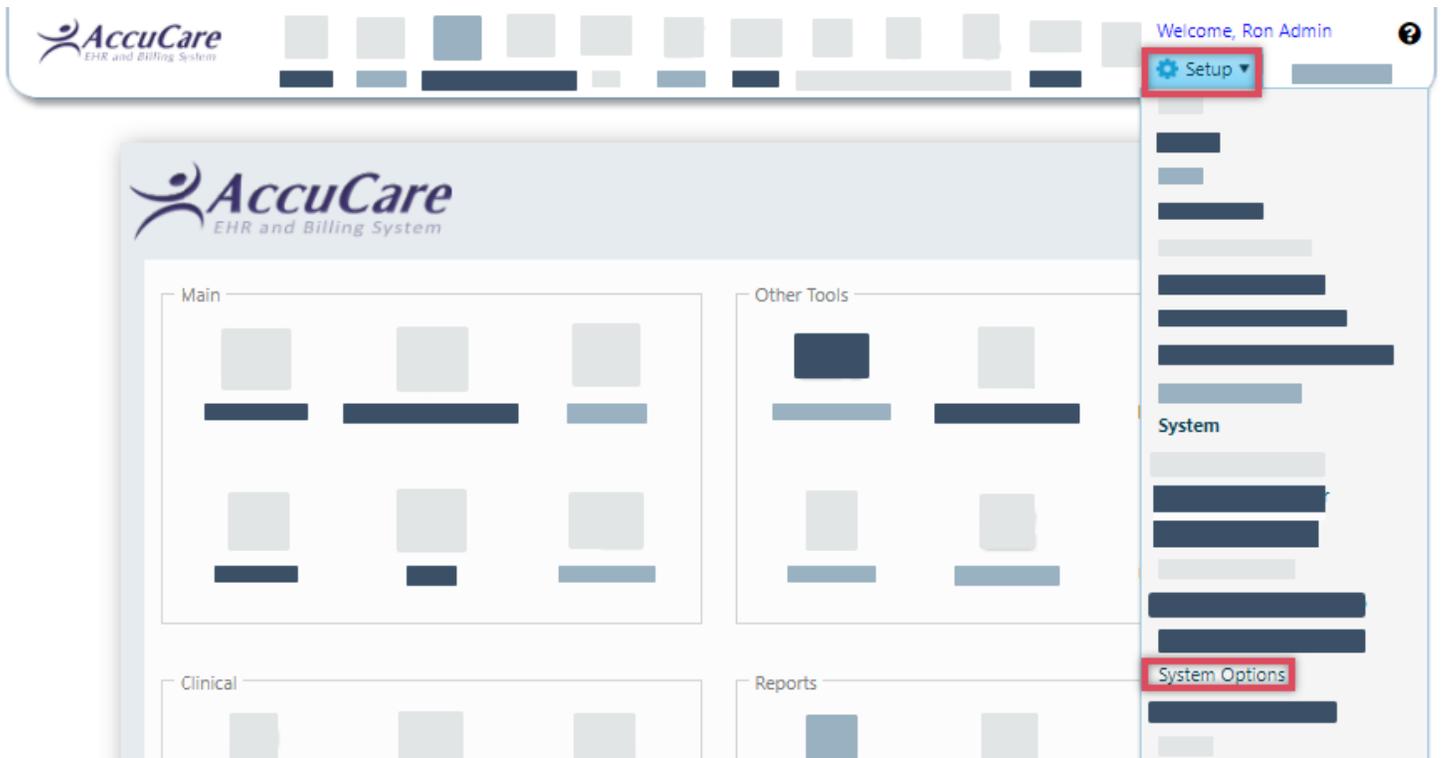


## How to Setup Assessment Data Carry Over

If you or your users have a requirement to create a second assessment for a returning client or every 6 months; there is an option in AccuCare to carry over the prior assessment into a new one. This option will help expedite the completion of a new assessment by creating a duplicate of all previous inputs allowing you to update only changed responses.

**\*\* Contact your Super Admin within your organization to setup this up in the System Options module.**

Location of System Option - from the Ribbon select **Setup** then click on **System Options**



## How to Setup Assessment Data Carry Over

Upon opening System Options look for **Carry Over Assessment** option under the General Tab

Click the **[Edit]** button

The screenshot shows the AccuCare System Options interface. The 'General' tab is selected and highlighted with a red border. The 'Carry Over to Assessment' option is also highlighted with a red border. The option is currently set to 'N' and has radio buttons for 'Always Carry Over' and 'Prompt User'. Other options include 'Data entry mode', 'Number of signature lines', 'Name - signature line 3', 'Title - signature line 3', 'Name - signature line 4', 'Title - signature line 4', 'Default Assessment Type', 'Default Treatment Plan Type', 'Default System Questionnaire Type', 'Carry Over to Follow-up', 'Disable SSN', 'Obscure SSN on Reports', and 'Obscure Tribal Enrollment Number on Reports'. The 'Edit' button at the bottom is also highlighted with a red border.

AccuCare  
Web-Based Practice Management System

Setup > System Options

General

Data entry mode  
[Do you want data entry mode where Y is entered as 1 (Y) or N is entered as 0 (N)]

Number of signature lines  
[Enter the default number of signature lines to use on reports - 1 to 4]

Name - signature line 3  
[Enter name for third signature line]

Title - signature line 3  
[Enter title for third signature line]

Name - signature line 4  
[Enter name for fourth signature line]

Title - signature line 4  
[Enter title for fourth signature line]

Default Assessment Type  
[Select default questionnaire type]

Default Treatment Plan Type  
[Select default treatment plan type]

Default System Questionnaire Type

**Carry Over to Assessment**  
[Enter Y to carry over from previous assessment to new assessment]

N

Always Carry Over  Prompt User

Carry Over to Follow-up  
[Enter Y to carry over from previous assessment or follow-up to new follow-up]

Disable SSN  
[Enter Y to disable SSN input in Client Intake]

Obscure SSN on Reports  
[Show only last two digits of SSN]

Obscure Tribal Enrollment Number on Reports  
[Show only last two digits of Tribal Enrollment Number]

Edit

## How to Setup Assessment Data Carry Over

To turn on this global option change the value of N to Y then select one of two rules

**Rule #1 - Always Carry Over** When the user clicks the [New] button the prior assessment's inputs are automatically copied into the new one without asking for a response.

Carry Over to Assessment  
[Enter Y to carry over from previous assessment to new assessment]

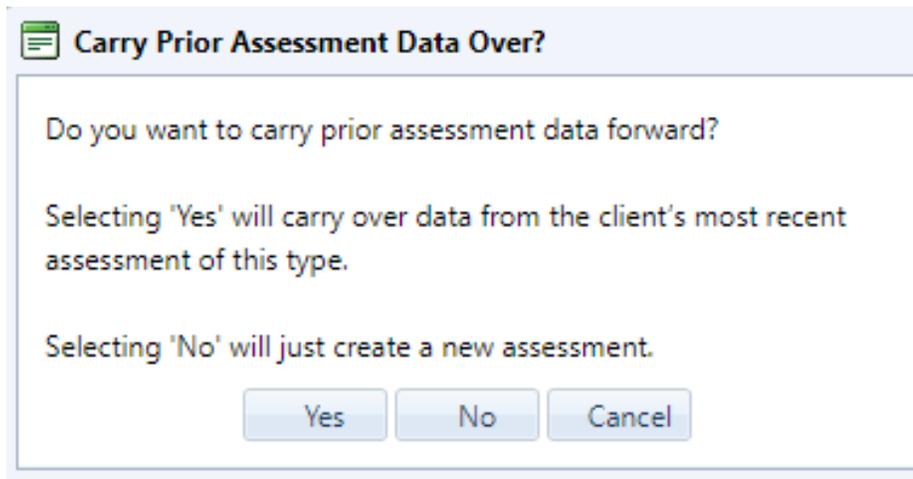
Always Carry Over  Prompt User

**Rule #2 – Prompt User** The user is given a prompt to either copy the prior assessment over or create a brand new blank assessment.

Carry Over to Assessment  
[Enter Y to carry over from previous assessment to new assessment]

Always Carry Over  Prompt User

Setting up Rule #2 will present the user with the option to carry over from prior assessment or create a brand new blank one when the **[New]** button in Assessment Module.

A dialog box titled "Carry Prior Assessment Data Over?". It contains the text: "Do you want to carry prior assessment data forward?", "Selecting 'Yes' will carry over data from the client's most recent assessment of this type.", and "Selecting 'No' will just create a new assessment." At the bottom are three buttons: "Yes", "No", and "Cancel".