



COPYING ASSESSMENTS BETWEEN PROGRAMS

This job aid will demonstrate how to copy assessments between programs within one organization.

ASSESSMENT LIST GRID

Assessment List

Assessment ID	Assessment Description	Assessor Name	Start Date	Completion Date	Assessment Status
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Would you like to pre-fill this assessment with the previous Exit Assessment? ☐ Yes ☒ No
Would you like to copy an assessment from another program within your Organization? ☒ Yes ☐ No

Select Assessment Remove

Assessment Date: 09/09/2015
Assessment Type: Program Entry Assessment

Show Preview Cancel

1. Bring the Accepted-Pending client into focus on the *Assessment Creation* screen.
 - a. Select the desired Accepted-Pending client on the *Bulletin Board* and click the **[Show]** button. You will be on the *Referral Details* screen.
 - b. Navigate to the *Assessment Creation* screen. Under *Provider Involvement* grid, enter provider involvement start date and facility and click **[Save]**.
2. Copy a previous assessment to an entry assessment.

TIP: The question “Would you like to pre-fill this assessment with the previous Exit Assessment?” should be answered with **[No]** unless the client is reentering in the same program after exiting previously.

- a. To copy a previous assessment as the client’s entry assessment, select radio button **[Yes]** to question *Would you like to copy an assessment from another program within your Organization?*
- b. Click the **[Select Assessment]** button to display the *Assessment Search* pop-up.



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- i. **TIP:** A previous exit assessment must be entered within the last 30 days by a program within your organization in order to copy it to a new entry assessment. If it was entered beyond the last 30 days, it will not appear as an option to select.

ASSESSMENT SEARCH POP-UP

Assessment Search

Select Provider Agency
GOODWILL OF SOUTHWESTERN PENNSY

Program ID	Program Name▲
619	GOODWILL - HEARTHOUSE 2-ESG
▶ 274	HEALTHY START HOUSE
596	JAIL-HARBOR PROGRAM
667	NSCM DROP IN CENTER ESG (DAY SHELTER)
668	PLEASANT VALLEY SHELTER ESG

Program Involvement List

Program Name	Program Start date	Enrollment Date	Est. Exit Date	Exit date	Voluntary Termination	Enrollment
▶ HEALTHY START HOUSE	09/09/2015	09/08/2015	09/07/2017	09/08/2015	Yes	Exited

Assessment List

Assessment ID	Assessment Description	Assessor Name	Start Date	Completion Date	Assessment Status
▶ 5505	Program Exit Assessment	KDTEST38 KDTEST38	09/09/2015	09/09/2015	Complete

Select Cancel

- c. On the *Assessment Search* pop-up, select the program the client was previously enrolled in. Select the assessment to be copied over to the new entry assessment by clicking the **[Select]** button.
- i. **TIP:** Program involvement information and available assessments to copy over will appear in the grid below each program as it is selected.



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ASSESSMENT LIST GRID WITH PREVIOUS ASSESSMENT SELECTED

Assessment List

Assessment ID ▼	Assessment Description	Assessor Name	Start Date	Completion Date	Assessment Status	
5518	Program Entry Assessment	KDTEST38 KDTEST38	09/09/2015		Active	<div>New Save Remove</div>

Would you like to copy an assessment from another program within your Organization? ☒ Yes ☐ No

Select Assessment Remove

Program ID	Program Name	Assessment ID	Assessment Description	Assessor Name	Start Date	Completion Date
274	HEALTHY START HOUSE	5505	Program Exit Assessment	KDTEST38 KDTEST38	09/09/2015	09/09/2015

Assessment Date*

Assessment Type*

Show Preview Cancel

- The selected assessment will appear in the grid above the Assessment Date and Assessment Type. Click **[Save]** to prepopulate this assessment as the client's new Entry Assessment.
- The copied assessment should now appear as the client's Entry Assessment on the *Assessment List* grid. To complete assessment, navigate and update assessment as needed in order to finalize and enroll client.

FOR MORE INFORMATION...

For assistance, please contact the Allegheny County Service Desk at servicedesk@alleghenycounty.us or 412-350-4357 (Option 2 for DHS).

To access the Self Service Tool go to: <http://servicedesk.alleghenycounty.us>