

# Switching an Initial Assessment Type

If an incorrect type of Initial Assessment (e.g. IA Primary or IA Secondary) has been entered, it can be switched prior to approval. As different information is collected based on the type of Initial Assessment, most information will not 'copy' over when switched; rather this allows you to replace the original Initial Assessment with the correct IA type.

1. Once an Initial Assessment has been entered and saved, 'Switch Assessment Type' will appear on the Options drop-down on that IA. To switch the IA type, select 'Switch Assessment Type' and click Go.

The screenshot shows the eWISACWIS Assessment page for 'American, Annie M.' with Assessment ID 9223623. The page has tabs for 'Participants', 'Basic', 'Allegations', 'Contacts', and 'Results'. The 'Participants' tab is active, displaying a table of assessment participants. An 'Options' dropdown menu is open, listing various actions. The 'Switch Assessment Type' option is highlighted with a red box. Other options include 'Approval', 'Extension', 'Link Report to Assessment', 'Serious Incident Notification', 'Assessment', 'Actual', 'Family RA Future A/N', 'IA Narrative', 'Strengths and Needs', 'Clinical', 'IA Primary', 'IA Checklist', 'SS Checklist', 'Ongoing Checklist', 'Text', 'Mandated/Relative Reporter Notice', and 'Safety Services Cover Sheet'. There are 'Go', 'Save', and 'Close' buttons on the page.

Name	Gender	DOB	Race	ICWA Record	Roles	Edit Roles
<a href="#">American, Jack</a>	Male	06/01/1973		<a href="#">Create</a>	AM	<a href="#">Roles</a>
<a href="#">American, Annie M.</a>	Female	08/08/1970	Asian	<a href="#">Edit</a>	HM-PR-RP	<a href="#">Roles</a>
<a href="#">Andrew, Annie M.</a>	Female	01/01/2006	White	<a href="#">Create</a>	AV-HM	<a href="#">Roles</a>
<a href="#">Andrew, Fannie</a>		01/01/2020	Asian	<a href="#">Create</a>	AV-HM-RN	<a href="#">Roles</a>

2. The following message will display. To continue click 'Yes'.

**Confirmation**

Switching the assessment type will delete information associated to the original assessment type upon save. Do you want to continue?

[Yes](#) [No](#)

3. The opposite type of Initial Assessment will automatically be launched. So, if an IA Primary was originally entered, the IA Secondary will automatically be launched, and vice versa.
4. Enter information for that IA type and Save when finished.