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.

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

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.