

Assessment Manual Upgrade Checklist

Prepare for Updating

- Check the attachments' Order of Presentation for each standard
 - WDs should be listed first
 - Proofs are listed next with the most recent year on bottom
- Link attachments from deleted standards to their corresponding location for the updated manual.
- Ensure all attachments are anchored to the standard statement



TIP: For standards that are deleted and/or moved to a new location within the updated manual, consider using your folders to store the compliance documentation for reattaching after the upgrade

Make a Copy of the Original Assessment

- Bookmark and archive your original assessment
 - Check to ensure the archived assessment is accessible to you by clicking the bookmark icon
- Open a new assessment using the SAME version of the manual of the original assessment. Add the assignments to the new assessment.
- Copy all attachments from your bookmarked assessment to the new assessment for each role your attachments are in
- Upgrade to the new version of the manual - PowerDMS walks you through the steps

Upgrading Assessments Do's and Don'ts

- ✓ Check your anchors before copying your assessment
- ✓ Upgrade the copy of the assessment not the original
- 👉 Move attachments to corresponding standards in the new manual / use folders for deleted standards
- ✗ Upgrade the assessment without creating insurance first (making a copy)
- ✗ Forget to set status to the standards in the upgraded assessment



TIP: Move attachments to corresponding standards BEFORE upgrading to the new manual

Are You Ready for the Assessment?

The following checklist will prepare you for your mock or final assessment. This can be done at any time prior to your assessment.

- Create a group for your assessors
- Assign the group to PARTICIPATE in the mock / final assessor role
- Assign the group to OBSERVE the accreditation manager role
- Check your order of presentation
- Check attachment anchors (to the standard statement)
- Check highlight mapping (to bullet points for bulleted standards)
- Check consistency in attachment titles and highlight labels
- Ensure appropriate statuses are set for each standard
- Assign yourself to OBSERVE the mock / final assessor role

- Ensure the assessor's group does NOT have audit (or edit) rights to the assessment
- Ensure all standards are documented according to the accrediting body's guidance for assessments

Are You Ready for Your Final Assessment?

- Navigate to the assessors' group you've already created
- Once assigned an assessor, add the assessor to the group. Do not add an email address for the assessor
- Email the assessor your SITE KEY, the username, and Password to your site
- Instruct the assessor to request the Unlock Key from the accrediting body or PowerDMS (final assessments)
- Watch your PowerDMS site as your mock / final assessors set status on your assessment!