

# Accreditation Association for Ambulatory Health Care

## Upgrading Assessments to the new Standards Manual in PowerDMS

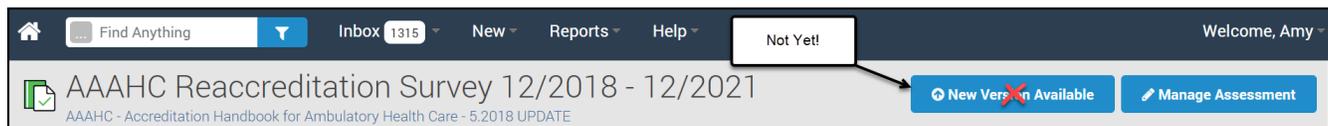
Due to the wholesale changes that the Accreditation Association for Ambulatory Health Care (AAAHC) has made to their Accreditation Handbook for Ambulatory Health Care, this guide will help you migrate your assessment to the latest version of the standards while maximizing your compliance documentation and highlights. This guide will minimize questions for agencies who use PowerDMS to build their assessments and who need to upgrade to the latest version of the AAAHC Handbook for Ambulatory Health Care.

### Table of Contents

<a href="#"><u>Warning</u></a>	1
<a href="#"><u>Attachment Anchoring Best Practices</u></a>	2
<a href="#"><u>Transitioning a Current Assessment to the Latest Standards Manual</u></a>	2
<a href="#"><u>Opening a New Assessment in v41 for a New Accreditation Cycle</u></a>	8

### **WARNING**

Read these instructions **before** you upgrade your assessment to the new version of the manual!



It is extremely important that you **DO NOT** navigate to your open AAAHC assessment and click the *Upgrade Assessment* button. While this action will be performed in the steps outlined in this guide, other protocols must be followed **prior** to this action. Failure to ensure you follow the steps (as outlined in the following pages) may result in losing the work you have completed towards proving compliance within your current assessment.

### Attachment Anchoring Best Practices

AAAHC has conducted a complete overhaul of the Accreditation Handbook for Ambulatory Health Care. These changes include a renumbering of many standards, reorganization of standards within the manual, deleted standards, newly added standards, relocation and/or rearrangement of elements of compliance, and changes to criteria for compliance ratings.

Due to these wholesale changes to the handbook, PowerDMS recommends checking attachment anchoring prior to updating your current assessment to the newest version of the handbook (v. 41).

To check attachment anchoring:

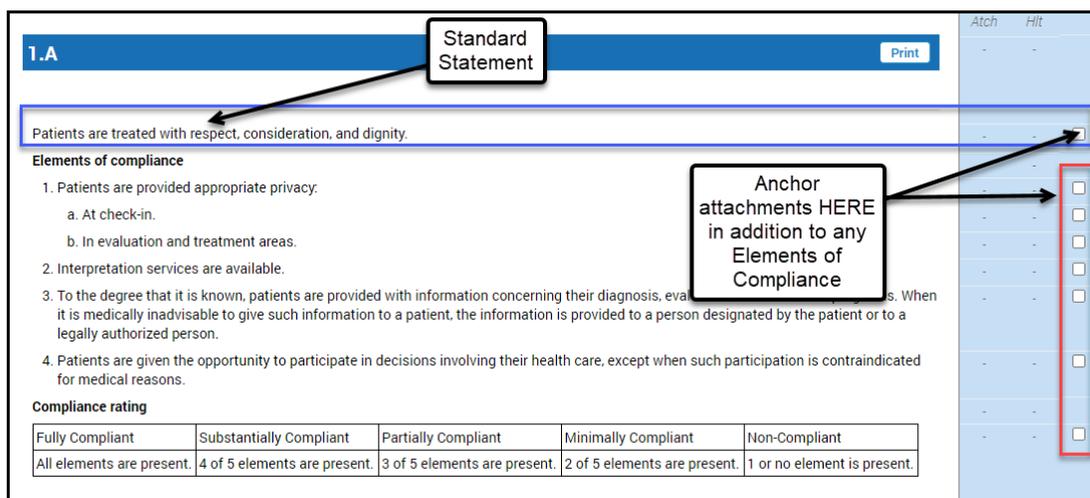
1. Navigate to the standard
2. Edit the attachment using the pull-out menu located on the right side of the attachment
3. Ensure the checkbox adjacent to the standard statement is selected even if you have selected checkboxes adjacent to Elements of Compliance.
4. Click Save

### **IMPORTANT NOTE**

If you have compliance documentation that is anchored to one or more dimensions of the Elements of Compliance, **it is a PowerDMS best practice to ALSO anchor your compliance documentation to the standard statement.**

One reason for anchoring attachments to the standard statement is to maximize the number of compliance documents that may be copied when the manual is updated. In other words...When the handbook undergoes additional revisions resulting in changes to the Elements of Compliance (i.e., deleted or relocated to a different standard), you may lose those attachments when you upgrade to the newest version of the manual **IF** those attachments are **only** anchored to one or more dimensions of the Elements of Compliance.

To ensure you retain the maximum number of attachments during a version upgrade, we recommend anchoring your attachments to the standard statement **IN ADDITION TO** any applicable Elements of Compliance.



## **Transitioning a Current Assessment to the Latest Version of the Manual**

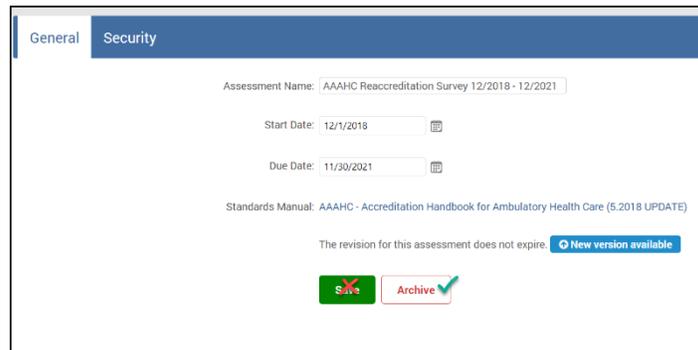
If you already have an open assessment under the AAAHC 5.2018 UPDATE (formatting adjustment), follow these steps to update to v41 with minimal loss of work you've done to your current assessment:

### **STEP 1: Archive your current assessment**

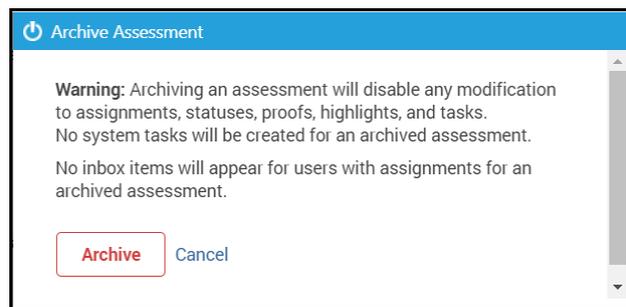
**That's right!** Archive your open assessment. This does two things. First, it preserves the work you have done on your current assessment. Second, it frees up your license so you can create a "copy" assessment for upgrading to the latest manual without losing your previous work.

To archive your current assessment

- a. Navigate to your assessment
- b. Select the *Manage Manual* button in the upper right-hand corner of your assessment.
- c. On the **General** tab, click the *Archive* button



- d. Click Archive to confirm



An archived assessment in PowerDMS is still accessible to you at any time. However, it does not show up in your active assessment list.

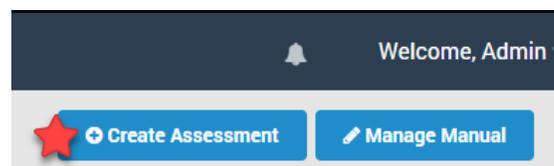
**STEP 2: Create a *NEW* assessment using the *AAAHC 5.2018 UPDATE (formatting adjustment)*.**

You may be thinking that I've made a mistake, "create a **New** assessment using the **OLD** version of the Handbook?" **But I didn't**...I want you to open a **NEW** assessment using the same version of the manual that you have been working in. In other words, the same version of the handbook as the assessment we had you archive in step 1. *If, at any time, you are concerned about moving forward, stop and contact PowerDMS support to help you through ([support@powerdms.com](mailto:support@powerdms.com) or 888-959-5158).*

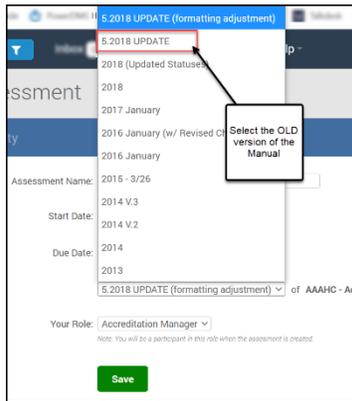
- a. Select the AAAHC manual from the blue menu under the Standards Manuals root.



- b. Click Create Assessment in the upper right-hand corner of the page.



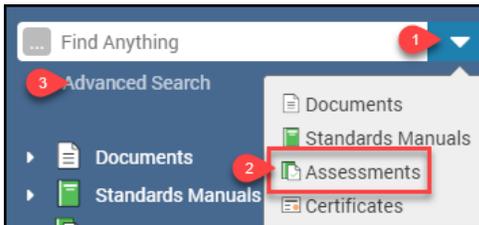
- c. Complete the fields for the new assessment with the information from the archived assessment to include the same start date and end date. Use the drop-down menu to select the old version of the manual. *NOTE: The latest version of the AAACH manual will appear in the field by default. Select the dropdown menu and select the older version of the manual.*



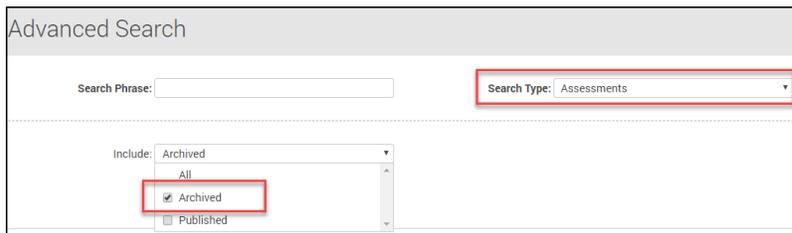
- d. Then select your role. It is **extremely** important that you have the **SAME** role in the new assessment as the archived assessment.
- e. Click **Save**.

**STEP 3: Access the Archived Assessment**

- a. Locate the archived assessment. To do this, click the white triangle in the Find Anything search bar and select Assessments from the drop-down menu. Then click Advanced Search.



- b. From the Advanced Search page, ensure the **Search Type** shows *Assessments*, and select *Archived* from the **Include** filter.



- c. Click **Search**
- d. Locate the assessment you just archived
- e. Click its title to view it.

Or

- a. Click the arrow on the name of the assessment in the viewer panel.
- b. Select the archived assessment from the drop-down field.

**STEP 4: Copy Tasks and Attachments to the New Assessment from the Archived Assessment**

PowerDMS gives you the ability to copy tasks and attachments quickly and easily from an archived assessment to a new assessment **using the same standards manual**. If you update your assessment to the latest version of the manual before following these steps or open a new assessment from the latest version of the manual, you will NOT be able to copy your attachments and tasks from the archived assessment. This results in the need to re-document your standards or recreate your tasks in the new assessment.

To copy attachments and tasks in bulk from the archived assessment, follow these steps:

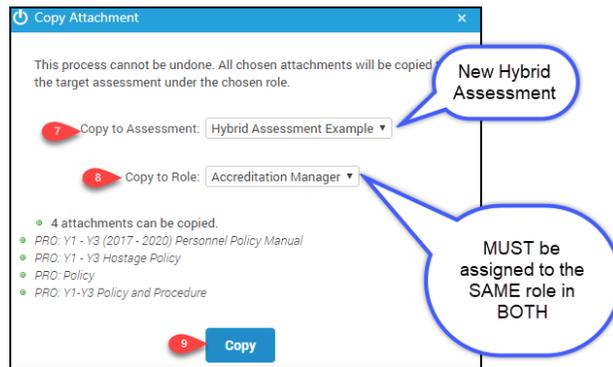
- a. In the **Archived** assessment, navigate to the root of the manual.
- b. Click the Attachments tab
- c. Use the filters to locate the attachments you want to copy. In the example below, I am copying all attachments labeled as written directives (WD). To do this, I will use the **NOTES** field and type my keyword “WD”, then click search.

- d. Select the master checkbox in the shaded area of the table. These will check all the boxes in the table automatically. You also have the option of changing the page size to include all attachments. This will allow you to copy all attachments over at once without navigating to additional pages.
- e. Select the *Select Action* button.

	Standard	Notes
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	View 4-4001	PRO: Policy
<input checked="" type="checkbox"/>	View 4-4002	PRO: Y1-Y3 Policy and Procedure
<input checked="" type="checkbox"/>	View 4-4048	PRO: Y1 - Y3 Hostage Policy
<input checked="" type="checkbox"/>	View 4-4048	PRO: Y1 - Y3 (2017 - 2020) Personnel Policy Manual

- f. Select Copy Selected Attachments from the drop-down menu.

- g. Select the new assessment from the *Copy to Assessment* drop-down menu.
- h. Select your role from the *Copy to Role* drop-down menu.
- i. Click the *Copy* button.



**NOTE:** These steps apply to bulk copying all attachments. You may easily copy other attachments (i.e., simple notes) to the new assessment by following the same steps above, but filtering for “Simple Note” attachment types and any keywords in the **NOTES** field.

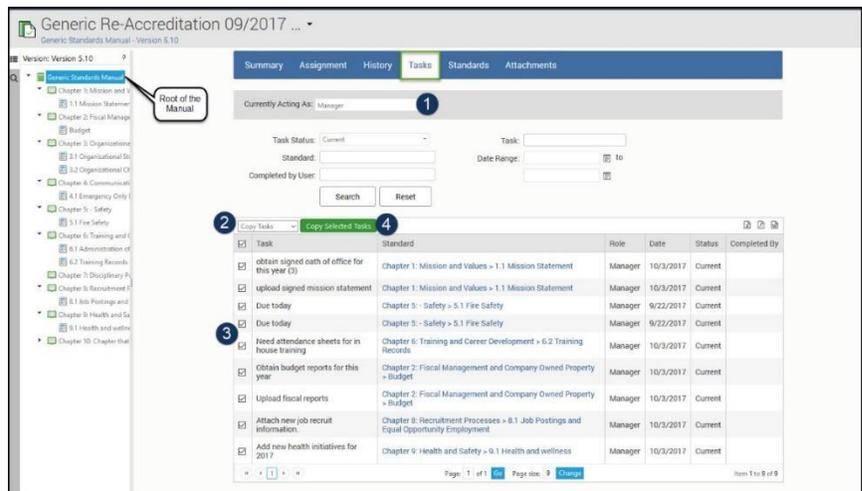
There are a few things worth mentioning:

1. The attachments will map over to the appropriate standards in the new assessment IF those standards still exist in v41.
2. Highlighting, labeling, and mapping copies over from the archived assessment so long as you made sure to anchor your attachments to the standard statement.

**STEP 5 (Optional): Copy Tasks to the New Assessment**

If you created tasks in your archived assessment, you may copy these tasks to the new assessment.

- a. Navigate back to the archived assessment following the process in STEP 3 above.
- b. From the root of the manual, click on the Tasks tab.
- c. From the *Currently Acting As* drop-down menu, select the **ROLE** of tasks you want to copy.
- d. From the *Select Action* drop-down menu, select *Copy Tasks*
- e. Click the master checkbox or select individual tasks separately
- f. Click *Copy Selected Tasks*



- g. Select the new assessment from the drop-down list
- h. Click *Next*
- i. Click *Next* again
- j. Click *Copy Tasks*

**Copy Tasks**

All selected tasks will be copied over to the target assessment.

Copy to Assessment

Assign Tasks to Role

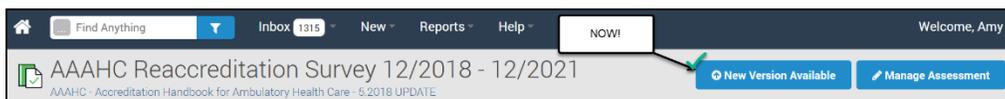
**Next** Cancel

**Important:** Tasks are assigned by Role. If you'd like to copy tasks for different roles (e.g., Accreditation Team), you must be assigned to both assessments (previous and new) in that Role.

**STEP 6: Upgrade the Open AAAHC 5.2018 UPDATE (formatting adjustment) to the new version of the standards handbook.**

You are now ready to upgrade your assessment to v41.

- a. Navigate back to your open assessment
- b. Check to ensure your attachments and tasks copied from the old assessment.
- c. Click the *New Version Available* button in the upper right corner of the assessment. This begins the upgrade process. NOTE: You cannot undo this action once you begin the process.



- d. Select *v41 from the table*
- e. Click *Upgrade*

**Upgrade Assessment**

Note: Upgrading an assessment to a newer version of a standards manual cannot be undone. [Learn more about up](#) v. 41 will appear at the top of the list assessment.

Version	Publish Date	Expiration Date	Upgrade
<input type="checkbox"/> 5.2018 UPDATE (formatting adjustment)	10/19/2018 1:32 PM	-	<a href="#">Upgrade</a>
<input type="checkbox"/> 5.2018 UPDATE	5/23/2018 1:15 PM	-	Current
<input type="checkbox"/> 2018 (Updated Statuses)	1/29/2018 3:40 PM	-	Not Available
<input type="checkbox"/> 2018	1/11/2018 11:51 AM	-	Not Available
<input type="checkbox"/> 2017 January	6/6/2017 8:36 AM	-	Not Available
<input type="checkbox"/> 2016 January (w/ Revised Chapter 17)	10/11/2016 4:01 PM	-	Not Available
<input type="checkbox"/> 2016 January	3/16/2016 7:20 AM	-	Not Available

- f. You will get a series of steps to review starting with a list of affected standards and the option to view a side-by-side comparison of the 5.2018 UPDATE (formatting adjustment) to v41. Scroll to the bottom of the page and click *NEXT*.

**Step 1 - Standards Manual Change Summary**

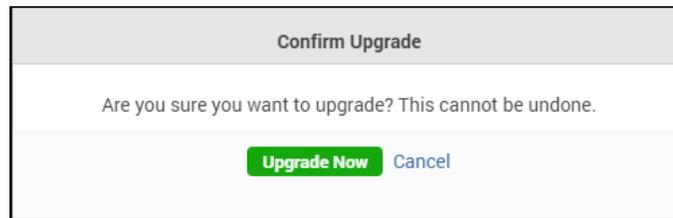
Upgrading ACI 4th Audit 11/2017 - 11/2020 from Standard Correction and Updated Forms to 5th Edition / 4th Edition.

Automatic Linking was **unchanged (On)**.

There are 1115 affected standards. [View Side-by-Side Comparison](#)

- 57 standards were added..
- 5-ACI-1A-19
- 5-ACI-1C-25
- 5-ACI-1F-02

- g. The next step asks you to create review tasks or remove all proofs. You should keep these default settings and simply select *NEXT*.
- h. The last step is a review. Simply scroll to the bottom of the page and select the *Finish & Upgrade* button. Then click *Upgrade Now*.



## **Opening a New Assessment in v41 for a New Accreditation Cycle.**

All new assessments for agencies seeking accreditation for AAAHC, will be opened using the latest version of the manual (v41). To open a new assessment, follow the instructions in the article, [Creating Assessments](#).