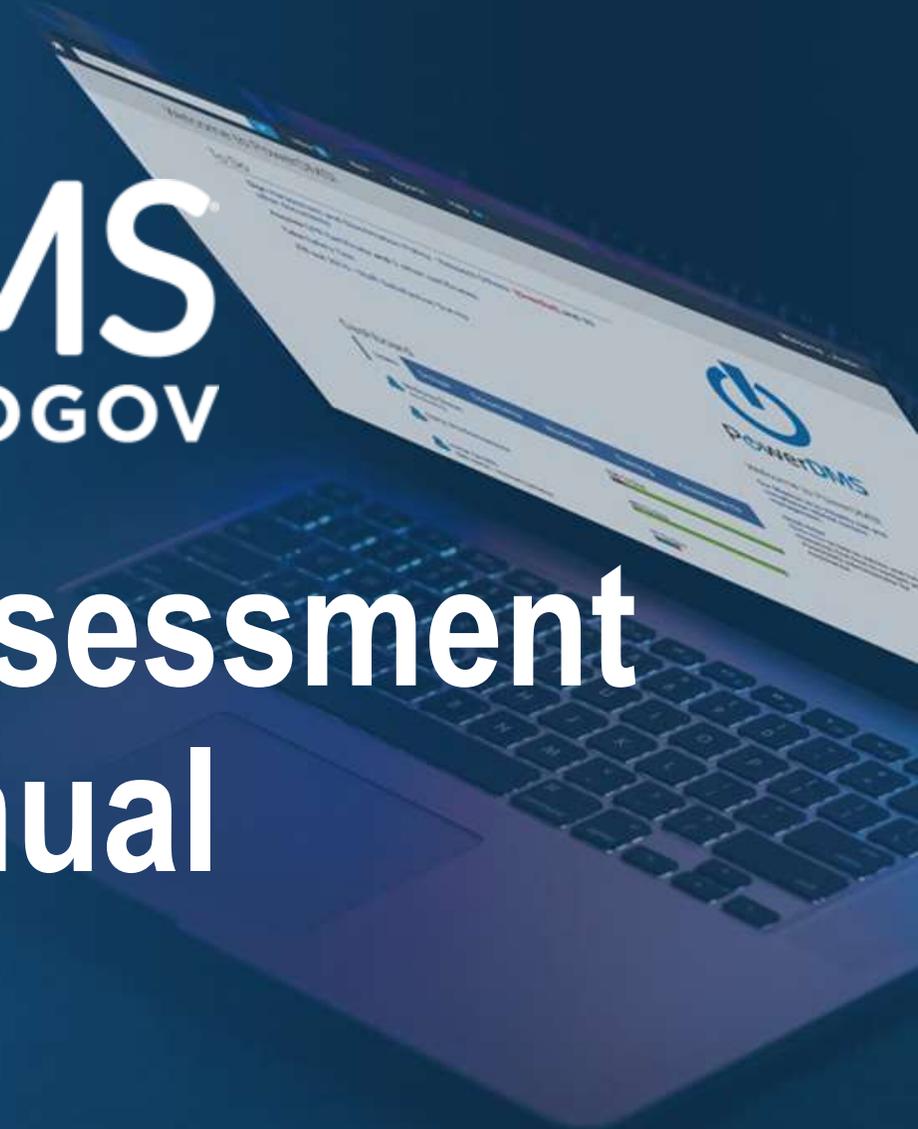


**PowerDMS**  
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# Upgrading Your Assessment to a New Manual

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# Amanda Bradford

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&  
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# This session will teach you how to:

- Identify when you have an update to assessment available
- Identify exactly what's changed in your manual that could impact your assessment
- Use the steps to crosscheck your assessment before upgrading
- Upgrade your assessment



# A Few Things to Note:

- This session is being recorded.
- The recording will be automatically Emailed to all registrants of this session, as soon as it becomes available.
- You can and should download a copy of this presentation from the Handouts section of the GoToWebinar sidebar.
- You can type in your questions any time within the questions field of GoToWebinar



# This session assumes you already

- ✓ Know how to subscribe to and access your manual in your PowerDMS site
- ✓ Know how to create your assessment
- ✓ Know how to add attachments to your assessment



# How do you know there's a new version available?

A blue rounded rectangular button with a white upward-pointing arrow icon on the left and the text "New Version Available" in white. The button is set against a light gray background.

New Version Available

A blue rounded rectangular button with a white pencil icon on the left and the text "Manage Assessment" in white. The button is set against a light gray background.

Manage Assessment

# Step 1: Compare Your Versions

**Note:** Upgrading an assessment to a newer version of a standards manual cannot be undone. [Learn more about upgrading your assessment.](#)

	Version	Publish Date	Expiration Date	Upgrade
<input checked="" type="checkbox"/>	Version 6.16	8/9/2022 1:13 PM	-	Upgrade
<input checked="" type="checkbox"/>	Version 6.15	4/13/2022 2:51 PM	-	Current
<input type="checkbox"/>	Version 6.14	12/1/2021 2:32 PM	-	Not Available
<input type="checkbox"/>	Version 6.13	7/28/2021 12:03 PM	-	Not Available
<input type="checkbox"/>	Version 6.12	4/7/2021 2:17 PM	-	Not Available
<input type="checkbox"/>	Version 6.11	11/30/2020 2:34 PM	-	Not Available
<input type="checkbox"/>	Version 6.10	8/17/2020 12:39 PM	-	Not Available
<input type="checkbox"/>	Version 6.9	11/25/2019 4:18 PM	-	Not Available
<input type="checkbox"/>	Version 6.8	5/9/2019 12:35 PM	-	Not Available
<input type="checkbox"/>	Version 6.7	1/9/2019 10:51 AM	-	Not Available
<input type="checkbox"/>	Version 6.6	12/20/2018 6:31 PM	-	Not Available
<input type="checkbox"/>	Version 6.5	8/3/2018 11:33 AM	-	Not Available
<input type="checkbox"/>	Version 6.4	4/3/2018 5:30 PM	-	Not Available

**Compare Selected Versions** Cancel

You can compare the selected versions to see what standards have been updated, added for removed from version to version.



# How to Compare Standards

The screenshot shows a hierarchical list of standards. The following table summarizes the callouts and their corresponding items:

Callout Description	Standard Item
Red indicates that standard has been removed	5.03 M (Red font)
Blue indicates that the standard has changed in location.	5.05 M (Blue font)
Blue indicates that the standard has changed in location.	5.06 M (Blue font)
Bold font indicates that the standard has been edited.	10.13 M (Bold font)

**Green font** color indicates the the item is newly added to the manual.

To view the specific changes made, you must select the item you wish to evaluate.



# Reading the Comparative View

**Original Item**

**7.1 Folders**

**Mandatory**

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Agency policy limits folder access to users. The policy includes:

- Which users may view folders and whether the view rights will include all documents and sub-folders within the folder
- Which users may access the folder's records
- Which users may create documents and sub-folders within a folder

**Revised Item**

**8.1 Folders**

**Mandatory**

---

Agency policy limits folder access to users. The policy includes:

- Which users may view folders and whether the view rights will include all documents and sub-folders within the folder
- Which users may access the folder's records
- Which users may create documents and sub-folders within a folder

Red indicates the modification.

Green indicates the new update.

# PowerDMS Tip

## Before deciding on your own...

- ✓ **Speak with your best point of contact from the Accrediting Body before updating assessment!**
- ✓ **Upgrades to your assessment cannot be undone.**

## Question:

How does upgrading your assessment affect your attachments?

## Answer:

Only attachments associated with affected standards are impacted.

- ✓ Deleted standards from one version to the next cannot carry over attachments.
- ✓ Changes to standards orientation maintain attachments.
  - Example: Standard 5.5.5 is changed to 4.5.5



# How to Upgrade Your Assessment

	Version	Publish Date	Expiration Date	Upgrade
<input type="checkbox"/>	Version 2.17	12/20/2018 6:42 PM	-	<a href="#">Upgrade</a>

Select upgrade to update your assessment.



# Step 1 of Upgrading

## Upgrade Assessment

**Note:** Upgrading an assessment to a newer version of a standards manual cannot be undone. [Learn more about upgrading your assessment.](#)

### Step 1 - Standards Manual Change Summary

Upgrading Amandas Assessment from Version 2.16 to Version 2.17.

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

There is 1 affected standard. ([View Side-by-Side Comparison](#))

- 1 standard was deleted..
- 5.3.2 Not in Use

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Next

PowerDMS will allow you to see the affected standards again prior to proceeding.

# Step 2 of Upgrading

 Upgrade Assessment

**Note:** Upgrading an assessment to a newer version of a standards manual cannot be undone. [Learn more about upgrading your assessment.](#)

### Step 2 - Changed Standards Settings

Perform the following actions for each listed role on the 0 standards that were changed by this upgrade:

Role	<input checked="" type="checkbox"/> Create review tasks	<input type="checkbox"/> Remove all proofs
Auxiliary	<input checked="" type="checkbox"/> Create review tasks	<input type="checkbox"/> Remove all proofs
Accreditation Team	<input checked="" type="checkbox"/> Create review tasks	<input type="checkbox"/> Remove all proofs
Accreditation Manager	<input checked="" type="checkbox"/> Create review tasks	<input type="checkbox"/> Remove all proofs
Mock Assessor	<input checked="" type="checkbox"/> Create review tasks	<input type="checkbox"/> Remove all proofs
CALEA Assessor	<input checked="" type="checkbox"/> Create review tasks	<input type="checkbox"/> Remove all proofs
CALEA Compliance Services Member	<input checked="" type="checkbox"/> Create review tasks	<input type="checkbox"/> Remove all proofs

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Next

Decide:

1. If you'd like to automate a task to be created to review the attachments originally chosen.
2. Remove the associated attachments automatically by selecting Remove all proofs for the appropriate roles.



# Step 3 of Upgrading

 Upgrade Assessment

**Note:** Upgrading an assessment to a newer version of a standards manual cannot be undone. [Learn more about upgrading your assessment.](#)

### Step 3 - Overview and Finish

Changed Standards: 10

- 4 standards were changed..
- 10.13 M
- 12.01
- 15.03 M
- 27.02 M
- 6 standards were deleted..
- 5.03 M
- CHOKEHOLDS
- DE-ESCALATION TECHNIQUES
- DUTY TO INTERVENE
- OBJECTIVELY REASONABLE
- VASCULAR NECK RESTRAINTS

**Tasks** - The following roles will have 4 review tasks created:

- Accreditation Manager
- Accreditation Team
- Mock Assessor
- Final Assessor

[Back](#) [Finish & Upgrade](#)

Last Chance to Check on  
Your Attachments!!



# Are you sure, your sure?

**Confirm Upgrade**

Are you sure you want to upgrade? This cannot be undone.

**Upgrade Now** Cancel



# PowerDMS Tip

- ✓ Remember, if you choose to upgrade, this cannot be undone.
- ✓ Review your attachments and assure you have any necessary copies of your attachments you may need prior to upgrading!

# You Should Now Be Able To:

- Identify when you have an update to assessment available
- Identify exactly what's changed in your manual that could impact your assessment
- Use the steps to crosscheck your assessment before upgrading
- Upgrade your assessment





# Resources

[Standards Series](#)

[Upgrading An Assessment](#)

