



We're Accredited! *What now?*

For an Accreditation Manager, it is anti-climactic to receive your initial accreditation. On the one hand, you're incredibly excited to have reached the finish line, be recognized by your peers for this amazing accomplishment, and see your picture in your local newspaper! Then you return to your agency and realize the process is about to begin all over again.

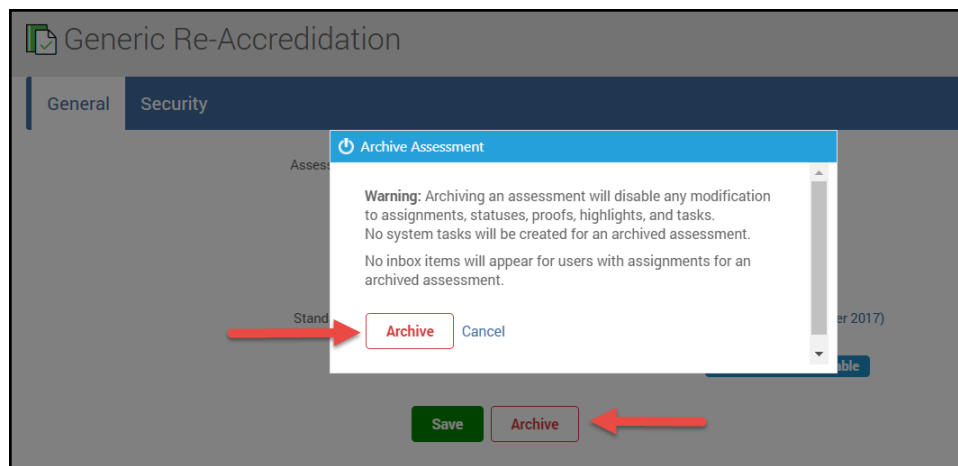
Do not despair, you have fellow Accreditation Managers who can cheer you onto your next goal – a 4-year accreditation cycle. It's a large undertaking that will prove to make a positive difference in your organization for years to come.



Archiving Your Assessment

Once your agency is ready to move from one assessment to a new assessment, the first action you should take is to archive your current assessment. Any archived assessment in PowerDMS will still be accessible to you at any time, it just won't show up in your active assessment list.

1. Navigate to your assessment.
2. Click the **Manage Assessment** button in the upper right corner of your screen.
3. From the Assessment **General** tab, click **Archive**.
4. In the pop-up window, click **Archive** to confirm or **Cancel** to go back.





Creating a New Assessment (As a Copy of the Assessment You Just Archived)

1. To create a new assessment, open your standards manual in the PowerDMS Manual Viewer, then click the **Create Assessment** button in the top right corner of the page.

The screenshot shows the 'Amusement Ride Safety Manual' page in the PowerDMS Manual Viewer. The page title is 'Amusement Ride Safety Manual' with '1st Edition' below it. In the top right corner, there are two buttons: 'Create Assessment' (with a plus icon) and 'Manage Manual' (with a pencil icon). A red arrow points to the 'Create Assessment' button. Below the title bar, there are tabs for 'General' and 'History'. The main content area shows the manual's title 'Amusement Ride Safety Manual' with a 'Print' button, followed by the text 'American Amusement Park Safety Commission' and three sections: 'Section 1', 'Section 2', and 'Section 3'.

2. Under the **New Assessment > General** tab, fill in the assessment name, start date, and due date. Next, select the manual you built your previously archived assessment from, and select your role. Ensure you have the same role in the new assessment that you held in the archived assessment.

The screenshot shows the 'New Assessment' form. The page title is 'New Assessment'. There are two tabs: 'General' and 'Security'. The 'General' tab is active. The form contains the following fields:

- Assessment Name:
- Start Date: with a calendar icon
- Due Date: with a calendar icon
- Manual Selection: of
- Your Role: with a dropdown arrow

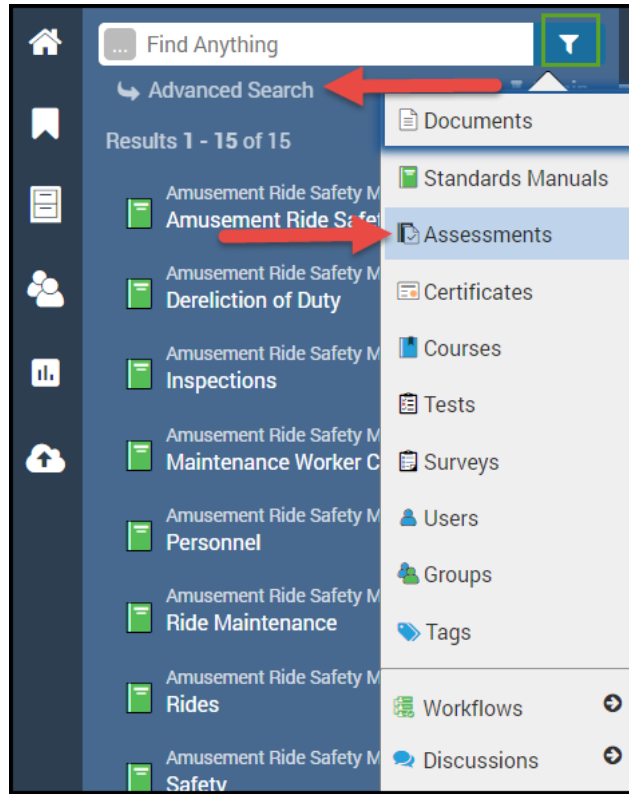
A note below the role field reads: 'Note: You will be a participant in this role when the assesment is created.' At the bottom of the form is a green 'Save' button.

3. Click **Save** when you're finished filling in the necessary information.

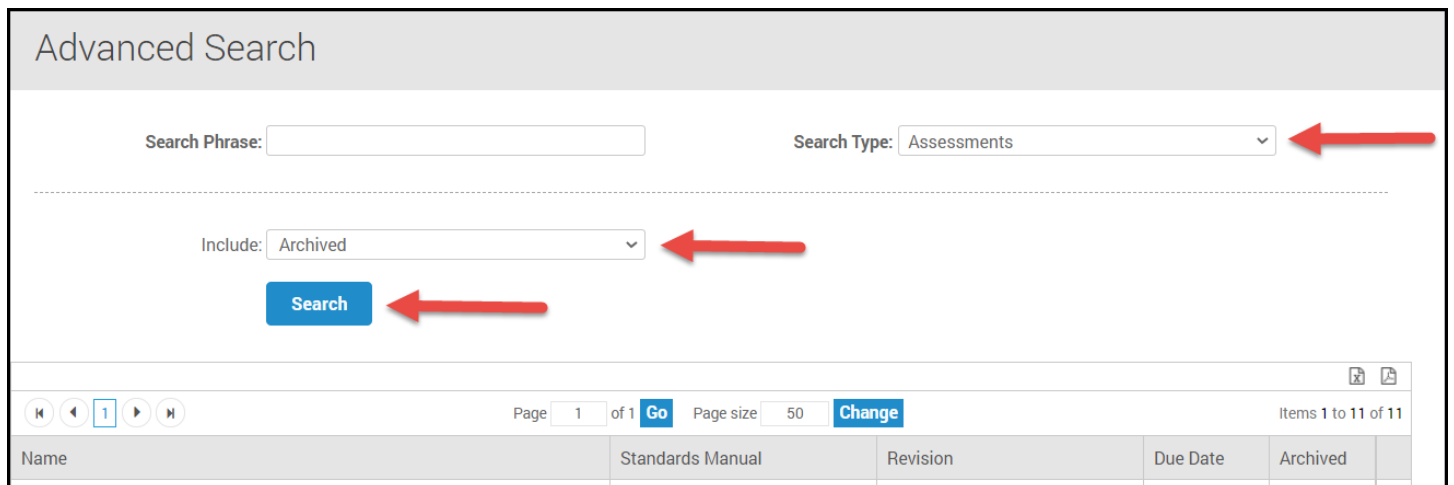
step 3

Navigating to Your Archived Assessment

1. Go to your **Find Anything** search bar above your left-side sidebar menu and click **Advanced Search**. You can select **Assessments** as your filter here.



2. From the **Advanced Search** page, if you didn't use **Assessments** as a filter, select **Assessments** from the **Search Type** drop-down menu. Then select **Archived** from the **Include** drop-down menu and click **Search**.



3. Once you locate the assessment you'd like to re-open, **click its title to view it**.

step 4

Copying Attachments in Bulk or Individually

1. Navigate to the root of the chapter or manual within your assessment, and click the **Attachments** tab.
2. You can click the **Filter** button and type a keyword to narrow down the search for the attachment you want to copy. Additionally, you can also narrow your search by date, role, attachment type, status, or notes by filling in the fields within this screen. For instance, you can search by "WD" for all your Written Directives.

Click the manual chapter from within your assessment.

Click Filter and type in any keyword to help narrow your search. You can also choose to fill in any of the above fields to find the attachment you are looking for.

Standard	Notes	User	Role	Created	Status	PowerDMS Document
<input type="checkbox"/> View	Rule 4. Application Requirements	Hiring standards for new hires as it applies to application requirements.	cbudrick - Cherilee Budrick	Consultant	8/30/2019	New Hire Standards

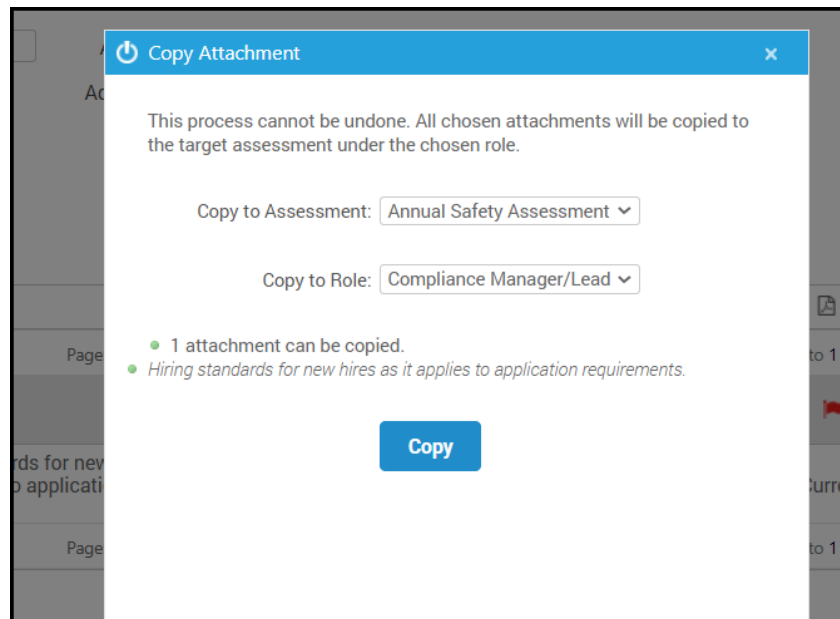
3. Once you see the attachment(s) you wish to copy, check the box to the left of the attachment title. You can click one or many. If all the attachments should be copied, select the very top checkbox (above the row for the first attachment). Please note, **only one page of attachments can be copied at a time.**
4. Click the **Select Action** button, then choose **Copy Selected Attachments.**

Update Selected Attachments

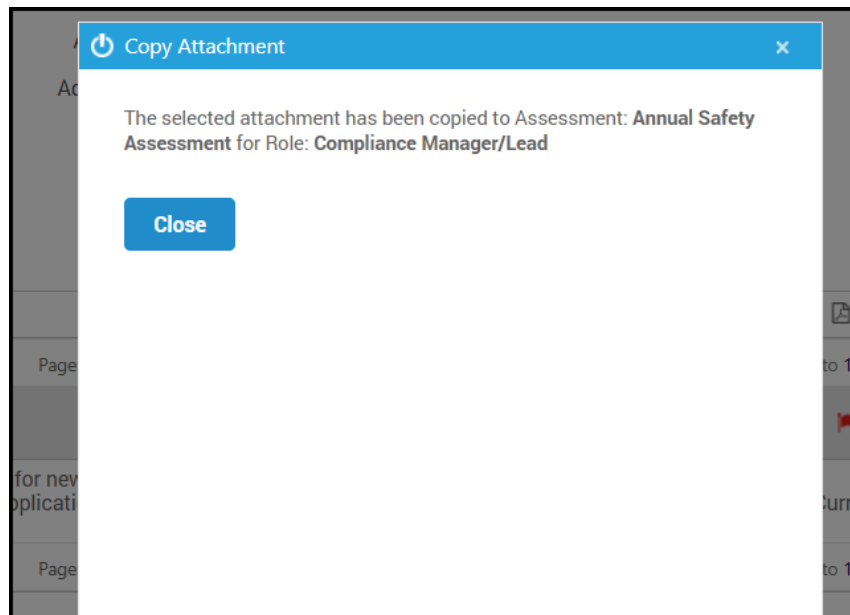
Copy Selected Attachments

Standard	Notes	User	Role	Created	Status	PowerDMS Document
<input checked="" type="checkbox"/> View	Rule 4. Application Requirements	Hiring standards for new hires as it applies to application requirements.	cbudrick - Cherilee Budrick	Consultant	8/30/2019	New Hire Standards

5. Under the **Copy to Assessment** drop-down menu, select the appropriate assessment you want to copy the attachment to. From the **Copy to Role** drop-down menu, select the applicable role that will need to manage the attachment. When you're ready, click **Copy**.



6. A pop-up confirmation message will let you know which assessment attachment was copied over from your archived assessment to your new assessment and to which role the attachment was assigned.



COMPLETE THIS STEP FOR EACH PAGE OF ATTACHMENTS. You cannot copy multiple pages at once.

Notes: Added after date:

Attachment Type: Added before date:

Added by Role: Status:

[Filter](#) [Reset](#)

[Select Action](#)

Page: of 1 [Go](#) Page size: [Change](#) Item 1 to 1 of 1

<input type="checkbox"/>		Standard	Notes	User	Role	Created	Status	PowerDMS Document	
<input type="checkbox"/>	View	Rule 4. Application Requirements	Hiring standards for new hires as it applies to application requirements.	cbudrick - Cherilee Budrick	Consultant	8/30/2019		New Hire Standards	Current

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Item 1 to 1 of 1

When all your attachments have been copied, log out and log back in. You should now see only your new assessment with all the attachments you've transferred over.

