Move Selected Data Overview

The Individualized Action Plan (IAP) should be completed in the Pre Admit episode, so that the Needs from the Comprehensive Assessment (CA) can be read. Once the IAP is completely finalized by all parties, it can be moved from the Pre Admit episode to the Admission episode.

1. In the *Entity Database* field, select Client.
2. In the *Form* field, select the form: **NYSCRI Individualized Action Plan**.
3. In the *Old Entity* field, enter the client name or ID, click Enter.
4. In the *Old Episode* field, select the client's pre-admit episode.
5. Click *Select Row to be Moved*.
6. A form selection screen displays. Select the row of data to move and click Ok.
7. View the *Row Details* for detailed information.
8. In the *New Entity* field, enter the client name or ID, click Enter.
9. In the *New Episode* field, select the client's admission episode.
10. In the *Reason for Moving Data* field, enter the data move reason, i.e. Move to admission.
11. Click *Submit*.

Note: Once the IAP is moved, it will be viewed in the Admission episode. The CA will be viewed in the Pre Admit episode.

Final to Draft Override Overview **(available to administrators only)**

Change a form's workflow status from final to draft. Draft status workflow items can be edited and resubmitted.

1. In the *Forms* field, select the form table. Forms that have final items can be selected.
2. In the *Entity Lookup* field, enter the client name, click Enter.
3. Click *Select Row*. A form selection dialog displays. Select the row, click Ok.
4. If appropriate, click *Print Row Contents* to generate a report of the form's information.
5. In the *Override Reason* field, enter the reason to revert the form to Draft.
6. Click *Submit*.

Treatment Plan Status Override Overview **(available to administrators only)**

Change a treatment plan status from pending approval or final to draft.

1. In the *Select Client* field, enter the client name, and select.
2. In the *Select Treatment Plan* field, select the treatment plan type to override.
3. In the *Select Client Plan* field, select the individual treatment plan.
   The field displays the treatment plan status, date, and name.
4. In the *Override Reason* field, enter the information.
5. Click *Print Treatment Plan* to view treatment plan information.
6. Click *Submit*.