

How to use an evaluation from a different patient

A. Under My Application

B. Find your client's case that has the evaluation that you want to copy over

Client	Date Created	Date Last Modified	Type	Application Status	% Complete	Status	Created By	
TEST CASE3	10/15/2019	10/15/2019	Purchase	Missing Clinicals	74%	Submitted	suebpdaw@yahoo.com	INVITE CREATE NEW OPTIONS
FAKE PACKET	04/11/2019	04/11/2019	Purchase		85%	In Progress	suebpdaw@yahoo.com	INVITE CREATE NEW OPTIONS
TRIAL OH TEST	04/10/2019	04/10/2019	Purchase		87%	In Progress	suebpdaw@yahoo.com	INVITE CREATE NEW OPTIONS

C. Click create a new case

D. A pop up will appear

What would you like to bring over? ×

Note: In order to create a copy of the application you must select an option.

Client Information Form

Evaluation

List of attachments on this application

Document Name	Document Type
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CREATE

E. Only click Evaluation—You must un check mark Client information form

F. Then hit create

G. This will bring you directly into the Client information form (all information will need to be for new patient) It will pull the previous person NAME (only) be sure to update that.

Please NOTE: You will need to make sure any references to the other patient are removed and all pronouns are updated in the speech evaluation.