Testing Checklist

TSI Healthcare 2017 Rheumatology Release

The following is a list of content clients are required to check, verify, and agree upon after a Test upgrade has been completed and before a Production upgrade can be scheduled. Please note that you are not only testing the new TSI Healthcare Rheumatology content, but also KBM 8.3.8, which is why it is necessary to test ALL areas of your workflow, not just those which are affected by the new TSI Healthcare Rheumatology content. We ask that the Client Team Lead reviews, initials, and signs this checklist. We recommend that at least two (2) staff members review each item to ensure no issues are missed.

Use the tables to document any errors or missing functionality in the new templates. If you are able to perform the task listed, mark the task as "Passed." If you were unable to perform the task or received an error, mark the "Failed" column. Be sure to note any issues, missing functionality, or error messages in the comments boxes or the additional Notes/Comments fields available at the end of each table. If the function does not apply to your practice, leave the Passed/Failed columns blank and note "Not Applicable" in the comments field. Every task below must be initialed by the staff member completing the checklist.

Once complete, submit your Client Testing Checklist to helpdesk@tsihealthcare.com or 888.808.6156. Please allow a minimum of five business days for a member of our Upgrade Team to contact your staff to review the results and address any issues. Feel free to contact us if you have questions.

Practice Name	
Client Team Lead	

Preparation & Training	
We have reviewed TSI Healthcare 2017 RHE Overview Document & understand the changes	

General Testing				
General Workflow & Templates	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
View historical encounter and confirm that all data is displaying properly (at least 5 encounters)				
Complete entire encounter from check-in to check-out (at least 5 encounters)				
All modules are receiving data from associated templates (at least 5 encounters)				
Documents	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
All data is captured accurately on generated documents (at least 5 encounters tested)				
No errors while opening documents (at least 5 encounters tested)				
All anticipated data is being displayed (at least 5 encounters tested)				

Rheumatology Specific Testing				
***Intake-RHE**	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Within the General panel:				
• Able to update patient's preferred pharmacies				
Within the Health Monitor panel:				
• Confirm that prior DXA, TB, ECHO, and PFT dates populate automatically in the Health Monitor fields				
• Able to manually enter dates in the Health Monitor fields (DXA, TB, PCP Visit, VF, ECHO, and PFT)				
• Confirm that overdue test dates display in Red				
***SOAP-TSI**	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Able to view patient's appointments (using the View Scheduled Appointments button at the top of template)				
Within the Health Monitor panel:				
• Confirm that prior DXA, TB, ECHO, and PFT dates populate automaticall in the Health Monitor fields				
• Able to manually enter dates in the Health Monitor fields (DXA, TB, PCP Visit, VF, ECHO, and PFT)				
• Confirm that overdue test dates display in Red				

Within the Labs / Diagnostics / Injections / Infusions / Communication panel:				
• Able to view data using the new toggle options on the left: ○ Labs ○ Diagnostics ○ Office Services/DME ○ Immunizations ○ Injections ○ Infusions ○ Communications ○ ICS/Documents/Images *(NOTE: ICS grid will only display scanned items from the last 90 days)*				
• Able to open an item in the ICS grid by double-clicking *(NOTE: ICS images must be linked to an EHR encounter in order to open.)*				
• Able to open an item in the Documents grid by double-clicking				
• Able to open an item in the Images grid by double-clicking				
Within Assessment & Plan panel:				
• Able to launch Facet Injection template by clicking on link				
• Able to launch Nerve Block template by clicking on link				
• Able to launch Epidural Injection template by clicking on link				

RHE ScoreCard	Passed Testing	Failed Testing	Comments	Client Initials
Pain Score: • Able to see Pain Score graphed on the ScoreCard (pain score value is obtained from the MDHAQ)				
Rodnan Skin Score: • Able to launch Rodnan Skin Score template • Able document Rodnan Skin Score and see result on Rodnan Skin Score graph				
FRAX: • Able to launch FRAX template and view FRAX website within the template • Able to enter patient information within the FRAX website and calculate scores • Able to document Major Osteoporotic and Hip Fracture scores at the top of the FRAX template • Able to see scores on the FRAX graph				
Outcomes Template	**Passed Testing**	**Failed Testing**	**Comments**	**Outcomes Template**
Able to launch Outcomes template from sub-navigation menu on **SOAP-TSI* template *(NOTE: Template may be slow to launch due to data compiling from multiple data sources)*				
Able to view patient's treatment history alongside any of the following scores (*if applicable*): • RAPID3 • HAQ2 • BASDAI • CDAI • DAS28				

Able to view patient's treatment history alongside any of the following lab values (*if applicable*): • Bilirubin • CBC • ESR • CRP • AST • ALT • VectraDA				
Copy Forward Template	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
If using or planning to use the Copy Forward template:				
• Ability to copy forward HPI from prior encounter				
• Ability to copy forward ROS from prior encounter				
• Ability to copy forward Physical Exam from prior encounter				
• Ability to copy forward Assessment & Plan from prior encounter				
• Ability to copy forward Dictation data from prior encounter				
• Ability to copy forward Entire Encounter				
If you chose to NOT allow copying between providers:				
• Verify that other provider encounters are not visible in the "Encounter Date to Copy" drop-down				

If you chose to EXCLUDE FIELDS from copying forward:				
• Verify that excluded field data is not copying forward. *(NOTE: After copying forward, you will need to open and close the template from which data was excluded to refresh the summary grid.)*				
If you chose to EXCLUDE VISIT TYPES:				
• Verify that excluded visit types are not visible in the “Encounter Date to Copy” drop-down				
One Page Physical Exam	**Passed Testing**	**Failed Testing**	**Comments**	
Able to utilize the “All Normal” checkboxes next to each Exam System				
Neurovascular: • Able to document Phalen’s and Tinel’s				
Musculoskeletal: • Able to document Occiput-Wall, Finger-Floor, and Modified Schober’s				
Confirm that data displays accurately in Physical Exam grid (on *SOAP-TSI template)				
Joint Exam (Simple)	**Passed Testing**	**Failed Testing**	**Comments**	
Able to toggle between *Joint Exam (Simple)*, *Joint Exam (Detailed)*, and *Soft Tissue Exam* using the tabs in top right corner				
Able to view Swollen/Tender Joint History by clicking on blue “Swollen/Tender Joint History” link				
Able to document SI joint findings *(NOTE: “Individual” joint exam option must be selected to see SI joint.)*				

Confirm that patient's last ESR and/or CRP value (and date) populates automatically				
Able to generate DAS28 score using CRP value (must select the CRP radio button)				
Able to calculate SDAI score				
If you chose to enable auto-calculate feature for disease scores: • Confirm that DAS28, CDAI, and SDAI calculate automatically when all data elements are present				
Joint Exam (Detailed)	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Able to toggle between *Joint Exam (Simple)*, *Joint Exam (Detailed)*, and *Soft Tissue Exam* using the tabs in top right corner				
Able to document SI joint findings				
Soft Tissue Exam	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Able to toggle between *Joint Exam (Simple)*, *Joint Exam (Detailed)*, and *Soft Tissue Exam* using the tabs in top right corner				
Assessment	**Passed Testing**	**Failed Testing**	**Comments**	
Confirm that only ICD10 codes display in the Billing Diagnosis History grid by default				
Able to select "ICD9" option and view ICD9 codes				
PT Orders				
Able to place PT order for Aquatic Therapy				

Confirm that PT Order document no longer displays full assessment/plan (should only display details related to the PT Order)				
Treatment Flowsheet	**Passed Testing**	**Failed Testing**	**Comments**	
Able to launch the Medication Flowsheet from the *SOAP-TSI template (in the Assessment/Plan panel)				
Able to enter start reason for active medication				
Able to enter start/stop reason for inactive medication				
Patient Providers	**Passed Testing**	**Failed Testing**	**Comments**	
Able to launch Patient Providers template, select providers to copy, and click "OK" button. When faxing the Chart Note or other EHR document, confirm that selected providers appear in faxing window after choosing "Patient Physicians" option.				
Infusion Order	**Passed Testing**	**Failed Testing**	**Comments**	
Able to select an Ordering Provider (other than the current provider) using the drop-down at top				
Able to Place Order for all infusion drugs administered by the practice				
Able to Cancel & Renew an existing order				
Able to Complete & Renew an existing order				
Able to view patient's current medications and allergies in the "Medications | Allergies" panel				

Pre Infusion Screening	Passed Testing	Failed Testing	Comments	Client Initials
Able to document up to 500 characters in “Details or additional side effects” field.				
Able to add new MyPhrase in the “Details or additional side effects” or “Additional Comments” areas.				
Able to use new MyPhrase after adding.				
Able to view Hep Panel results in the Hep Panel grid.				
Infusion Flowsheet	**Passed Testing**	**Failed Testing**	**Comments**	
Able to document the administration of all infusion drugs administered by the practice				
Able to enter vitals				
Able to document Pre-Infusion and Post-Infusion details				
Able to enter vitals				
Able to generate Infusion Flowsheet document and confirm that all information appears accurately on the document				
If using Charge Pass Through:				
• Confirm that billing grid populates with correct CPT codes, units, and diagnoses after documenting drugs administered				
• Able to submit all charges to EPM by clicking the Submit button				

Prior Authorization Tracking	Passed Testing	Failed Testing	Comments	
Able to locate and open the Prior Authorization-TSI template				
Chart Review panel:				
Able to view the following items: • Labs • TB Test • Disease Activity • Infusion History • Injection History • Office Services • Diagnostics • DEXA • ICS/Documents/Images • Immunizations • Vitals Signs				
• Able to view active and inactive medications				
• Able to view Treatment Start/Stop Reason				
Allergies Panel:				
• Able to view allergies				
Problem List Panel:				
• Able to view problem list				
Prior Authorization Tracking Panel:				
• Able to view patient's Infusion Orders				
• Able to view patient's Injection Orders				

• Able to select an order from the Infusions or Injections grid and see details populate in the MANAGE ORDER section below				
• Able to enter the following Authorization details on selected order: ○ Authorization obtained ○ Date obtained ○ Authorization # ○ Effective Date ○ Expiration Date ○ # Visits *(NOTE: Authorization Details should continue to be documented in EPM for billing purposes, and should be entered there prior to documenting on Prior Authorization-TSI template. When clicking in the "Authorization #" field, you should be able to select from patient's list of authorizations that have already been entered in EPM.)*				
• Able to enter Consent details: ○ Consent Obtained ○ Obtained Date ○ Reason/Comments				
• Able to enter Scheduling details: ○ Scheduled ○ Date ○ Time ○ Location *(NOTE: Appt Details should continue to be documented in EPM, and should be entered there prior to documenting on Prior Authorization-TSI template. When clicking in the "Scheduled Date" field, you should be able to select from patient's list of appointments that have already been entered in EPM.)*				

• Able to free-type any additional comments in the “Action/Comment” field				
• Able to click the Save button to update the Order and save Action/Comments to the grid below				
• Able to click the Save & Task button to update the order, save Action/Comments to the grid below, and send task to designated recipient				
• Able to document on the Prior Auth Sticky Note and confirm this information carries forward to the next encounter				
Practice Orders Console	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Launch “*Practice Orders Console-TSI” template from EHR File Menu (File → System/Practice Template → Practice → Show All → *Practice Orders Console-TSI)				
Able to see all patient orders in the Order Management grid				
Able to apply the following filters to the Order Management grid: - Order Date Range - Order Type - Order Status - Ordering Provider				
Able to select an order from the grid an update using the fields below				
Able to select an order from the grid and go to patient’s chart using “Open Chart” button				
If practice uses Future/Recurring Orders in the Orders Module:				
Able to manage future/recurring orders in the Orders Module panel				

CUSTOM TEMPLATES/DOCUMENTS	
Description	**Initials**
We are aware that any customizations performed on KBM templates may need to be re-performed during future KBM upgrades. Work performed to recreate these customizations will be billable at then standard hourly rate.	

TESTING				
Custom Templates/Documents	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Custom templates function as designed (at least 5 encounters tested)				
Custom documents generate properly (at least 5 encounters tested)				
New data entered displays properly (at least 5 encounters tested)				
Previously entered data displays properly (at least 5 encounters tested)				

List All Custom Templates Needed in Production

(These will need to be exported out of Test prior to Prod Upgrade, and imported into Prod post-upgrade. You ONLY need to list templates that have been modified in your Test environment since the TSI Healthcare 2017 RHE Content was loaded.)

Prior to RHE Go Live	
Description	**Client Initials**
We understand that TSI Healthcare recommends that all documents should be generated for all encounters by close of business on upgrade date. (Un-generated documents can be generated after the TSI Healthcare 2017 RHE package is loaded, however the TSI Healthcare 2017 RHE package may include updates which will affect the content of documents.)	

Additional Notes/Comments for TSI Healthcare 2017 RHE Testing:

We would also love to know which items were a big win for your practice this release. Please feel free to share your thoughts on which enhancements were most beneficial for your practice. (*NOTE: Future enhancement requests can be submitted to rheumatology@tsihealthcare.com for consideration*.)