

Client Testing Checklist (6.2021.1 Upgrade)



CONFIGURE

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. We ask 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.

Document testing results using the form provided below.

- If you are able to perform the task listed, mark the task as “Passed.”
- If you cannot perform the task or received an error, mark the “Failed” column and use the Comments box to provide as many details as possible, including ‘steps taken’ prior to the error. Attach screenshots if at all possible.
- 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.
- Leave the Passed/Failed columns blank and note “Not Applicable” in the Comments box if not applicable to your practice.
- Every task below must be initialed by the staff member completing the checklist.
- Additional pages may be attached to the end of the checklist if needed.

Once complete, submit the Client Testing Checklist to helpdesk@tsihealthcare.com or 919.442.0042. 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 EPM Team Lead	
Client EHR Team Lead	

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EPM TESTING				
Chart	Passed Testing	Failed Testing	Comments	Client Initials
Chart lookup for existing patient				
Chart maneuvering				
Print data sheet (if used)				
Print fee ticket				
Charge entry – add charges				
Payment entry & post batch				
Add a new patient & create chart				
Print demand statements				
Appointments	Passed Testing	Failed Testing	Comments	Client Initials
Appointment lookup				
Open existing appointment				
Reschedule appointment				
Cancel appointment				
Make new appointment				
Check-in appointment				

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Check out appointment				
Reports	Passed Testing	Failed Testing	Comments	Client Initials
Daily charge report				
Daily payment report				
Letters	Passed Testing	Failed Testing	Comments	Client Initials
Print Demand Encounter letters (if used)				
Print Demand Account letters (if used)				
Processes	Passed Testing	Failed Testing	Comments	Client Initials
Run EDI Encounter build & claim edits <i>(DO NOT send claims)</i>				
Run Statements build <i>(DO NOT send statements)</i>				

REPORT SERVER TESTING

(NOTE: Report Server Testing is only needed for clients on their own servers. If you are hosted on TSI's ASP, mark "N/A" and proceed to EHR Testing.)

Description	Initials
Can logon to Report Server and access all reports that are commonly used	
Daily reports generated successfully	
Weekly reports generating successfully	

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Monthly reports generating successfully	
Can print reports from report server	

EHR TESTING

(IMPORTANT NOTE: Testing should be completed in TEST or DEVL using existing patients. It is recommended that users duplicate real encounter information while testing to ensure testing workflows accurately represent production end user workflows.)

Top Icon Toolbar & Patient Information Bar	Passed Testing	Failed Testing	Comments	Client Initials
Confirm SOGI information displays correctly when hover over patient gender				
Confirm all patient information displays accurately on Patient Information Bar				
Confirm number indicators on patient badges are correct and hover function shows accurate data				
Confirm patient's Future and Past Appointments displays correctly <i>NOTE: Number of future and past appointments displayed will vary based on practice's configurations</i>				
Alerts	Passed Testing	Failed Testing	Comments	Client Initials
Verify that if patient has alerts present that the badge turns red				
Verify able to add/update alerts				

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Verify that the hover feature on the alerts button is working and all alerts display correctly				
Patient History Toolbar	Passed Testing	Failed Testing	Comments	Client Initials
Verify the new refresh button on Patient History Toolbar refreshes data on the Patient History tab				
Verify the new refresh button on Patient History Toolbar refreshes data on the Categories tab				
Verify the new Search Document Icon launches Document Search window				
On Document Search window, enter keyword or phrase to search for documents and open document from search results <i>NOTE: As not all documents are copied from Prod to Test, opening a document that was not created in Test may result in an error</i>				
Templates - Historical Data from Existing Encounters	Passed Testing	Failed Testing	Comments	Client Initials
Verify all templates open without error <i>NOTE: Opening pre-5.9.2020.1 customized templates rather than new version may result in an error</i>				
Verify all previously entered data from old encounters displays as anticipated				

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NOTE: Only one month of previously generated documents and scanned images created in Prod will populate in the TEST environment, older documents, may result in an error.

Templates - New Data Entered on New Encounters	Passed Testing	Failed Testing	Comments	Client Initials
Can create new encounters				
Complete at least 5 new encounters from check-in to check-out				
All templates open without error				
All new data displays as designed				
All active text links function				
All pick list values are displaying as anticipated				
All data grids function				
All buttons function				
Can add demographic data and is displaying as anticipated				
Can add medical history and displays accurately				
Can add social history and displays accurately				
Can add family history and displays accurately				
Can add new patient problem				
Can modify existing patient problems				

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*Finalize Template - 2021 E&M coding Guidelines <i>(if applicable)</i>	Passed Testing	Failed Testing	Comments	Client Initials
Verify time populates appropriate E&M visit code				
Verify prolonged service field populates appropriate code and units				
Encounters Flagged as Containing Substance Abuse Disorder Information & Disclaimer Statement <i>(if applicable)</i>	Passed Testing	Failed Testing	Comments	Client Initials
Confirm checking "Record contains substance abuse disorder information" checkbox on template displays practice's preferred configuration statement on generated documents <i>NOTE: Checkbox will only be present if your practice has decided to enable feature on 6.2021.1 Setup Form.</i>				
Screening Template <i>(if applicable)</i>	Passed Testing	Failed Testing	Comments	Client Initials
Verify able to launch and complete a screening from the Screening template and verify documented information appears on generated visit document				
Sensitive Encounters	Passed Testing	Failed Testing	Comments	Client Initials

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Verify able to mark encounter as sensitive by right clicking encounter and updating Sensitivity Settings <i>NOTE: User completing task must have appropriate permissions enabled in System Administrator to use this feature.</i>				
Confirm encounter marked as sensitive displays red exclamation point indicator next to encounter date				
Configurable Vital Sign BMI Alerts <i>(if applicable)</i>	Passed Testing	Failed Testing	Comments	Client Initials
Add height/weight information to generate BMI within range of practice's configured BMI alert and verify alert displays on the Vitals Signs popup template <i>NOTE: Only applicable if new BMI configurations were requested on practice's 6.2021.1 Setup Form.</i>				
My Phrases	Passed Testing	Failed Testing	Comments	Client Initials
Able to add, modify and create My Phrase with new functionality.				
APSO (assessment, plan, subjective, objective) <i>(if applicable)</i>	Passed Testing	Failed Testing	Comments	Clients Initials
Verify document generates and displays information appropriately.				

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Will not include any customization fields				
<i>NOTE: Only applicable if configurations were requested on practice's 6.2021.1 Setup Form.</i>				
Saves to encounter when selected				
Ophthalmology Only Template Enhancements	Passed Testing	Failed Testing	Comments	Client Initials
Confirm able to copy forward past lensometry and manifest refraction to today's visit				
Confirm able to view and copy forward exam details from previous encounters utilizing new Copy Past Exam-OPH template				
Verify new SITA Faster checkbox is available and able to be documented on Visual Fields – OPH template				
PRAPARE Template (if applicable)	Passed Testing	Failed Testing	Comments	Client Initials
Verify able to launch PRAPARE template and document data				
Generate PRAPARE document and verify data displays accurately				
Documents	Passed Testing	Failed Testing	Comments	Client Initials
Generate all EHR documents used by practice and verify data displays accurately				

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<i>(list out any documents that do not generate properly)</i>				
<i>NOTE: Previously generated documents and scanned images will not populate in the TEST environment.</i>				
Images (if applicable)	Passed Testing	Failed Testing	Comments	Client Initials
Open an EHR Image (new image)				
Save an EHR Image to encounter				
Medications	Passed Testing	Failed Testing	Comments	Client Initials
Add new medication				
Confirm Print Prescription (preview) displays properly				
Confirm Fax Prescription (preview) displays properly				
Verify able to launch the Clinical Reconciliation module from the Medications Module				
<i>NOTE: ePrescribing, faxing, ePA, EPCS, RTBC, and Medication Reconciliation cannot be tested until go live.</i>				
Allergies Module	Passed Testing	Failed Testing	Comments	Client Initials
Add allergies with multiple reactions with reaction severities				
Verify able to change order of reactions listed for allergy				
Confirm all allergies and their associated reactions/severities display correctly in grids and documents				

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Verify able to add criticality to new and existing allergies				
Verify able to launch the Clinical Reconciliation module from the Allergies Module				
Problems Module	Passed Testing	Failed Testing	Comments	Client Initials
Verify able to add and update Clinical Problems in the Problem List				
Verify able to add and update ICD diagnosis to the Billing ICD List				
Verify able to launch the Clinical Reconciliation module from the Problems Module				
Orders Module	Passed Testing	Failed Testing	Comments	Client Initials
Create new lab and radiology orders				
Confirm preview of new lab and radiology requisitions				
AUC TESTING (if applicable) – able to calculate AUC score, verify “indication not found” checkbox in indications window, verify modifiers and g-code generated				
Verify able to manually add results to orders (if applicable/normal practice workflow)				

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Verify results on Results tab display correctly				
<i>NOTE: If lab interface exists, will not be able to test interface functionality until go live.</i>				
Immunizations <i>(if applicable)</i>	Passed Testing	Failed Testing	Comments	Client Initials
Enter multiple historical vaccines at one time (if applicable)				
Place and complete an immunization order				
Generate Immunization Report and verify data displays properly				
<i>NOTE: If immunization registry interface exists, will not be able to test interface functionality until go live.</i>				
PAQ	Passed Testing	Failed Testing	Comments	Client Initials
Items display properly in provider's PAQ				
Providers can sign-off on items in PAQ				
Verify sign-off displays on PAQ items after signing				
Add Sign-off Comments to lab result and verify comments display in Orders Module under Sign-off and Tracking Comments panel				
<i>NOTE: Previously generated documents and scanned images will not populate in the TEST environment and if opened, may result in an error.</i>				
Workflow/Inbox	Passed Testing	Failed Testing	Comments	Client Initials
Appointment schedule displays accurately in the EHR inbox				
Tasks display accurately in EHR inbox				

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Verify the hover function for patient information is working				
Confirm accuracy of number indicator on tabs for pending items				
Verify the filters tabs contain the correct tasks (if applicable)				
Create new EHR task and assign to user/group				
Create new PM task in EHR (if applicable)				
Accept an EHR task				
Reassign an EHR task				
Decline task				
Verify tasking from template functions correctly				
Verify new Message Manager View tab able to be viewed NOTE: User must have appropriate permissions in System Administrator to view new Tab for Clinical Message Manager (formerly Rosetta Holding Tank)				
Document Management	Passed Testing	Failed Testing	Comments	Client Initials
Scan & file new item				
Complete a file import				
Complete a batch import				

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Patient Education	Passed Testing	Failed Testing	Comments	Client Initials
Can launch Patient Education from File Menu, Problems Module, Medications Module, and Procedures Module				
Confirm able to save patient education documents to patient's encounter				
Crystal Reports	Passed Testing	Failed Testing	Comments	Client Initials
Run all custom Crystal Reports used (if applicable)				

EHR Customizations	
Customization Status	Client Initials
<p>I have discussed customizations with my TSI Upgrade Specialist and evaluated our practice's need for customizations in 6.2021.1. Based on this evaluation (mark ONE response only):</p> <ul style="list-style-type: none"> <input type="checkbox"/> We do not need any customizations completed prior to the 6.2021.1 upgrade. <input type="checkbox"/> We would like TSI to complete our customizations. All customizations needed prior to our 6.2021.1 upgrade have been submitted to TSI Healthcare on the (separate) Customization Request Form. <input type="checkbox"/> We will complete our own customizations prior to the 6.2021.1 upgrade. 	
I understand that any customization requests submitted after go live on 6.2021.1 will be addressed through the standard development request process.	

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Prior to Go Live	
Description	Client Initials
I understand that:	
<ul style="list-style-type: none"> All EHR documents should be generated for all encounters by close of business on upgrade weekend 	
<ul style="list-style-type: none"> All items in PAQ should be signed off on by close of business on upgrade weekend 	
<ul style="list-style-type: none"> All Document Management batches should be filed by close of business on upgrade weekend 	
<ul style="list-style-type: none"> All Patient Portal messages should be accepted/denied by close of business on upgrade weekend 	
<ul style="list-style-type: none"> All eRx requests should be accepted/denied by close of business on upgrade weekend 	
<ul style="list-style-type: none"> All NextPen forms should be accepted/denied by close of business on upgrade weekend 	

Additional Testing Notes/Comments (attach additional pages if needed):