6.2021.1 Upgrade & TSI 2022
Rheumatology Content Testing Checklist

CONFIGURE/TEST
Avoiding disaster - Test, test, then test some more

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 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, documents, and modules. If you can 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 comment's boxes or the additional Notes/Comments fields available at the end of the document. 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. You may also attach any additional pages to the end of the checklist if needed.

Once complete, submit your Client Testing Checklist to helpdesk@tsihealthcare.com or fax it to 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 any questions.

Practice Name	
Client EPM Team Lead	
Client EHR Team Lead	

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Preparation & Training	
We have reviewed the 6.2021.1 Overview Document, watched training videos, & understand the changes	
We have reviewed the 2022 TSI RHE Overview Document & understand the changes	

EPM TESTING				
Chart	Passed	Failed	Comments	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 new patient & create chart				
Print demand statements				
Appointments	Passed	Failed	Comments	Initials
Appointment lookup				
Open existing appointment				
Reschedule appointment				

Cancel appointment				
Make new appointment				
Check in appointment				
Check out appointment				
Reports	Passed	Failed	Comments	Initials
Daily charge report				
Daily payment report				
Letters	Passed	Failed	Comments	Initials
Print Demand Encounter letters (if used)				
Print Demand Account letters (if used)				
Processes	Passed	Failed	Comments	Initials
Run EDI Encounter build & claim edits (DO NOT send claims)				
Run Statements build (DO NOT send statements)				

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 generating successfully	
Weekly reports generating successfully	
Monthly reports generating successfully	
Can print reports from report server	

EHR TESTING (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 Info Bar	Passed	Failed	Comments	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 NOTE: Number of future and past appointments displayed will vary based on practice's configurations				

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Alerts	Passed	Failed	Comments	Initials
Verify that if patient has alerts present that the badge turns red				
Verify able to add/update alerts				
Verify that the hover feature on the alerts button is working and all alerts display correctly				
Patient History Toolbar	**Passed**	**Failed**	**Comments**	**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 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				
Templates - Historical Data from Existing Encounters	**Passed**	**Failed**	**Comments**	**Initials**
Verify all templates open without error NOTE: Opening pre-6.2021.1 customized templates rather than new version may result in an error				
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, opening older documents can result an error.

Templates - New Data Entered on New Encounters	Passed	Failed	Comments	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 picklist 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				
*Finalize Template - 2021 E&M coding Guidelines (if applicable)	Passed	Failed	Comments	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 (if applicable)	Passed	Failed	Comments	Initials
Confirm checking “Record contains substance abuse disorder information” checkbox on template displays practice’s preferred configuration statement on generated documents NOTE: Checkbox will only be present if your practice has decided to enable the feature on 6.2021.1 Setup Form.				
Screening Template (if applicable)	Passed	Failed	Comments	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	Failed	Comments	Initials
Verify able to mark encounter as sensitive by right-clicking encounter and updating Sensitivity Settings NOTE: User completing task must have appropriate permissions enabled in System Administrator to use this feature.				
Confirm encounter marked as sensitive displays red exclamation point indicator next to encounter date				

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Configurable Vital Sign BMI Alerts (if applicable)	Passed	Failed	Comments	Initials
Add height/weight information to generate BMI within range of practice's configured BMI alert and verify alert displays on the Vital Signs popup template NOTE: Only applicable if new BMI configurations were requested on practice's 6.2021.1 Setup Form.				
My Phrases	**Passed**	**Failed**	**Comments**	**Initials**
Able to add, modify and create My Phrase with new functionality.				
PRAPARE Template (if applicable)	**Passed**	**Failed**	**Comments**	**Initials**
Verify able to launch PRAPARE template and document data				
Generate PRAPARE document and verify data displays accurately NOTE: Link will only be present if your practice has decided to enable the feature on 6.2021.1 Setup Form.				
Documents	**Passed**	**Failed**	**Comments**	**Initials**
Generate all EHR documents used by practice and verify data displays accurately				
NOTE: Only one month of previously generated documents and scanned images from Prod will populate in the TEST environment.				
Images (if applicable)	**Passed**	**Failed**	**Comments**	**Initials**
Open an EHR Image (new image)				
Save an EHR Image to encounter				

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Medications	Passed	Failed	Comments	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				
NOTE: ePrescribing, faxing, ePA, EPCS, RTBC, and Medication Reconciliation cannot be tested until go live.				

Allergies Module	Passed	Failed	Comments	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				
Verify able to launch the Clinical Reconciliation module from the Allergies Module				

Problems Module	Passed	Failed	Comments	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	Failed	Comments	Initials
Create new lab and radiology orders				

Confirm preview of new lab and radiology requisitions				
Verify able to manually add results to orders (if applicable/normal practice workflow)				
Verify results on Results tab display correctly				
AUC TESTING (if applicable) – able to calculate AUC score, verify “indication not found” checkbox in indications window, verify modifiers and g-code generated				
NOTE: If lab interface exists, it will not be able to test interface functionality until go live.				

Immunizations (if applicable)	Passed	Failed	Comments	Initials
Enter multiple historical vaccines at one time (if applicable)				
Place and complete an immunization order				
Generate Immunization Report and verify data displays properly				
NOTE: If immunization registry interface exists, it will not be able to test interface functionality until go live.				

PAQ	Passed	Failed	Comments	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				
NOTE: Previously generated documents and scanned images will not populate in the TEST environment and if opened, may result in an error.				

Workflow/Inbox	Passed	Failed	Comments	Initials

Appointment schedule displays accurately in the EHR inbox				
Tasks display accurately in EHR inbox				
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**	**Failed**	**Comments**	**Initials**
Scan & file new item				
Complete a file import				
Complete a batch import				

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Patient Education	Passed	Failed	Comments	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	Failed	Comments	Initials
Run all custom Crystal Reports used (if applicable)				

Rheumatology Specific Testing				
*Intake-RHE	Passed	Failed	Comments	Initials
Within the General panel:				
Able to update patient's preferred pharmacies				
Able to view and update the Patient Assistance grid				
Able to update the Clinical Trial list, verify alert displays accurately, and tasking works as configured				
Within the Health Monitor panel:				
Confirm that prior DEXA, TB, ECHO, and PFT dates populate automatically in the Health Monitor fields				
Able to manually enter dates in the Health Monitor fields for PCP Visit and VF				
Confirm that overdue test dates display in Red				

If utilizing any of the configurable Health Monitor fields, verify that fields are visible and data is populating accurately				
Within the Orders Panel				
Able to place follow up order using the Follow Up Button				
Able to document DEXA and include location where test was performed				
Able to document TB Test including location where test was performed and generate TST Result document				
If Intake Signoff panel is enabled:				
Able to document Nursing Notes and signoff as nurse				
Able to task to provider				
Able to document Provider Notes and signoff as provider				
*Histories-RHE	Passed	Failed	Comments	Initials
Able to view and update the Patient Problem list				
*SOAP-TSI	Passed	Failed	Comments	Initials
Within the General panel:				
Able to view and update the Patient Assistance grid				
Able to update the Clinical Trial list, verify alert displays accurately, and tasking works as configured				
Within the Patient Story Panel:				
Able to free-text information and verify information carries forward from visit to visit				

Within the Health Monitor panel:				
Confirm that prior DEXA, TB, ECHO, and PFT dates populate automatically in the Health Monitor fields				
Able to manually enter dates in the Health Monitor fields for PCP Visit and VF				
Confirm that overdue test dates display in Red				
If utilizing any of the configurable Health Monitor fields, verify that fields are visible and data is populating accurately				
Within the Labs | Diagnostics | Injections | Infusions | Communication panel (if panel is configured to display):				
Able to view data using the toggle options on the left: ○ Labs ○ Diagnostics ○ SubQ ○ Injections ○ Infusions ○ Communications ○ TB Test ○ DEXA ○ Treatment Flowsheet ○ Documents/Images NOTE: Document Management grid should display scanned items from the selected filter option.				

Able to document DEXA and include location where test was performed				
Able to document TB Test including location where test was performed and generate TST Result document				
Able to open an item in the Document Management grid by highlighting scanned document and selecting the Preview button				
Able to open an item in the EHR Documents grid by double-clicking				
Able to open an item in the Images grid by double-clicking				
Able to highlight a completed order in the Diagnostics grid and Print Report				
Within Problems panel:				
Able to view and update the Patient Problem list				
Able to view Resolved problems				
Within Review of Systems panel:				
Able to view and document in Review of Systems Dictation field				
Within all Dictation Fields:				
Able to choose multiple My Phrases at a time in dictation fields such as: ○ HPI Details ○ ROS Details ○ Exam Details ○ Assessment Details ○ Plan Details				

NOTE: Multi-select My Phrases will only be available if your practice has decided to enable the feature on the TSI RHE Setup Form.				
Within Assessment & Plan panel:				
Able to launch RHE ScoreCard by selecting link				
Able to launch Medication Orders template by selecting link				
Able to launch RHE MIPS Dashboard by selecting link				
When selecting the Save & Complete button for a patient who has multiple appointments on the same day, ensure the status is updated only on the appointment that is linked to the selected encounter NOTE: Only if practice configuration was requested				
Ensure any unused/underutilized panels that were selected to be removed on the TSI RHE Set Up Form are no longer visible. These may include: ○ Care Guidelines ○ Medication | Allergies panel ○ History Summary panel ○ Labs | Diagnostics | Injections | Infusions | Communications panel				
Default Rheumatologist	**Passed**	**Failed**	**Comments**	**Initials**
Able to add or update the Default Rendering Physician in the Chart Details tab of the Modify Patient information window and confirm it populates the Patient Information Bar NOTE: You must close out of the patient chart and re-open to see the change.				

RHE Summary Template	Passed	Failed	Comments	Initials
Ability to launch from the Patient Information bar and view the following information without opening an encounter: ○ Patient Story Box ○ Infusions, Meds, Joint Inj, SubQ/IM, DEXA, TB, Labs, and Diagnostics grid ○ Disease Activity ○ Communication History ○ Actions Taken grid from Prior Authorization ○ Assessment/Plan History ○ Research Study History ○ Documents/Images History ○ Allergies, Vitals, and Immunization History				

RHE ScoreCard	Passed	Failed	Comments	Initials
Screener and Opioid Assessment for Patients with Pain-Revised (SOAPP-R): ○ Able to launch SOAPP-R template ○ Able document SOAPP-R score and see the result on SOAPP-R graph				
Opioid Risk Tool (ORT): ○ Able to launch ORT template ○ Able document ORT score and see the result on ORT graph				
Maastricht Ankylosing Spondylitis Enthesitis Score (MASES): ○ Able to launch MASES template ○ Able document MASES score and see the result on MASES graph				

Outcomes Template	Passed	Failed	Comments	Initials
Able to launch Outcomes template from the sub-navigation menu on *SOAP-TSI template				
Able to view patient's treatment history alongside any of the following scores (if applicable): ○ BASDAI ○ BASMI ○ CDAI ○ DAS28 ○ HAQ2 ○ FIQR ○ PASI ○ RAPID3 ○ RODNAN ○ SDAI ○ SLEDAI ○ TLAS ○ MASES ○ SOAPP-R ○ ORT ○ Swollen Joints (SJ28) ○ Tender Joints (TJ28)				
Able to view patient's treatment history alongside any of the following lab values (if applicable): ○ Bilirubin ○ CBC ○ ESR				

○ CRP ○ AST ○ ALT ○ Vectra DA				
Copy Forward Template	Passed	Failed	Comments	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	Failed	Comments	Initials
Able to utilize the "Disease State" radio buttons to highlight pertinent sections of the Physical Exam				
Musculoskeletal System: ○ Able to document Hand and Wrist findings separately ○ Able to document Foot and Ankle findings separately ○ Able to document the SI Joint ○ Able to document Patrick's / FABER ○ Able to document Lateral Lumbar Flexion ○ Able to document Hand Dominance ○ Able to access MASES by selecting link, document findings to calculate score, and view score on the One Page PE ○ Able to select multiple picklist findings				
Confirm that data displays accurately in Physical Exam grid (on *SOAP-TSI template)				
Joint Exam (Simple)	**Passed**	**Failed**	**Comments**	**Initials**
Able to toggle between Joint Exam (Simple), Joint Exam (Detailed), and Soft Tissue Exam using the tabs in the 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.				
Able to use Copy Hand and Copy Feet buttons and verify data copies accurately				
If enabled, able to use Select All quick button functionality for: ○ MCPs ○ PIPs (hand) ○ DIPs (hand) ○ MTPs ○ PIPs (foot) ○ DIPs (foot)				
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 the auto-calculate feature for disease scores: ○ Confirm that DAS28, CDAI, and SDAI calculate automatically when all data elements are present				

Joint Exam (Detailed)	Passed	Failed	Comments	Initials
Able to toggle between Joint Exam (Simple), Joint Exam (Detailed), and Soft Tissue Exam using the tabs in the top right corner				
Able to document SI joint findings				

Right and Left Hand: ○ Able to copy findings from Right Hand to Left Hand and vice versa ○ Able to select multiple picklist findings in the comments field				
Right and Left Foot: ○ Able to copy findings from Right Foot to Left Foot and vice versa ○ Able to select multiple picklist findings in the comments field				
Soft Tissue Exam	Passed	Failed	Comments	Initials
Able to toggle between Joint Exam (Simple), Joint Exam (Detailed), and Soft Tissue Exam using the tabs in the top right corner				
Assessment	Passed	Failed	Comments	Initials
Confirm that only ICD10 codes display in the Billing Diagnosis History grid by default				
Able to select “ICD9” option and view ICD9 codes				
Able to sort Clinical Problems List using sort pop-up				
Able to remove inactive/old diagnoses by selecting “Resolve Condition” button NOTE: The “Add assessments on 1-click” checkbox must be unselected.				
Able to sort and filter My Favorites list by selecting Code <u>OR</u> Description radio button				
Assessment/Plan Details	Passed	Failed	Comments	Initials
On the *SOAP-TSI template in the Impression/Plan panel, when an Impression or Plan is selected for a				

diagnosis in the grid, the diagnosis will be automatically populated on the Assessment/Plan Details template				
Referral Order	Passed	Failed	Comments	Initials
Able to create template defaults for referral order				
Able to load created defaults on different patients encounters				
Medication Order	Passed	Failed	Comments	Initials
Able to create template defaults for medication order				
Able to load created defaults on different patients encounters				
PT Orders	Passed	Failed	Comments	Initials
Confirm that PT Order document no longer displays full assessment/plan (should only display details related to the PT Order)				
If tasking is enabled, verify that task is sent to appropriate user/workgroup when order is placed				
Follow Up Order	Passed	Failed	Comments	Initials
Able to document a follow-up call instead of a follow-up visit				
If mid-level pairing is enabled, place a follow up order for a provider and confirm that correct mid-level provider displays NOTE: Only available if your practice has decided to enable feature on the TSI RHE Setup Form.				
Diagnostic Result	Passed	Failed	Comments	Initials
Open a previously placed DEXA order and utilize the DEXA Results link to generate Result details text				

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Treatment Flowsheet	Passed	Failed	Comments	Initials
Able to launch the Treatment Flowsheet from the *SOAP-TSI template (in the Assessment/Plan panel)				
Able to filter Medication List by category				
Able to enter start reason for active medication				
Able to enter start/stop reason for inactive medication				
Able to generate Treatment Flowsheet document				
Patient Providers	**Passed**	**Failed**	**Comments**	**Initials**
Able to launch Patient Providers-TSI template, select providers to copy, and select the “OK” button. When faxing the Chart Note or other EHR document, confirm that selected providers appear in faxing window after choosing “Patient Physicians” option.				
If enabled, verify that PCP, Referring, and/or Other CC Providers checkboxes are automatically checked when Patient Providers-TSI template opens (as specified on TSI RHE Setup Form)				
If fax number is missing from a patient’s provider, confirm red alert icon displays				
Able to remove CC provider’s by selecting the Clear button and verify provider is also removed from PM patient provider list				
Joint Injection – New MR Template	**Passed**	**Failed**	**Comments**	**Initials**
Able to carry forward previous injections by using the Copy Forward button				

When applying joint injection defaults, ensure selected default inserts into the next available injection site (Rather than overwriting Site 1)				
Able to copy injections between site using the Copy buttons for easier documentation of bilateral injections				
Able to promote or demote using the arrow buttons				
SubQ/IM Injection MR Template	Passed	Failed	Comments	Initials
Able to select Order from Standing/Future Orders grid and Copy Forward to Today's Visit NOTE: Will only work for medication orders placed on RHE 2022 Release or later				
Ensure appropriate verbiage displays on Intake Note, Procedures, and Chart Note documents when “Bill for teaching visit” checkbox is selected				
Infusion Order	Passed	Failed	Comments	Initials
Able to select an Ordering Provider (other than the current provider) using the drop-down at the 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				
When an order is canceled/completed, verify that associated Other Medications are also canceled/completed				
Able to view the patient’s current medications and allergies in the “Medications | Allergies” panel				

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Pre Infusion Screening	Passed	Failed	Comments	Initials
Able to document up to 500 characters in “Details or additional side effects” field.				
Able to add new My Phrase in the “Details or additional side effects” or “Additional Comments” areas.				
Able to use new My Phrase after adding.				
Able to view Hep Panel results in the Hep Panel grid.				
Infusion Flowsheet	**Passed**	**Failed**	**Comments**	**Initials**
Select an infusion order to administer today and verify that Suggested Next Appointment displays accurately				
Select an infusion order to administer today and verify that Prior Authorization alert appears if Prior Authorization has not been obtained. NOTE: The accuracy of this alert is dependent on the practice using the TSI Prior Authorization template to document when authorization is obtained.				
Able to document the administration of all infusion drugs administered by the practice				
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	Failed	Comments	Initials
Able to launch 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: o Authorization obtained o Date obtained o Authorization # o Effective Date o Expiration Date o # Visits NOTE: Authorization Details should continue to be documented in EPM for billing purposes, and should be entered there before documenting on Prior Authorization-TSI template. When clicking in the "Authorization #" field, you should be able to select from the patient's list of authorizations that have already been entered in EPM.				
Able to enter Consent details: o Consent Obtained o Obtained Date o Reason Comments				
Able to enter Scheduling details: o Scheduled o Date o Time o Location				

NOTE: Appt Details should continue to be documented in EPM, and should be entered there before documenting on Prior Authorization-TSI template. When clicking in the “Scheduled Date” field, you should be able to select from the 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 a designated recipient				
Able to document on the Prior Auth Sticky Note and confirm this information carries forward to the next encounter				
Able to generate Prior Authorization Document and verify that it includes: o Tried and Failed Drugs o Last DEXA o Last TB o Labs (30, 60, 90 days or Manual) o Actions Taken grid				
Able to generate Patient Facesheet Document and verify that it includes: o Patient Demographics o Primary Care Physician o Employment o Marital Status o Spouse Name				

○ Emergency Contact ○ Insurance Coverage				
Clearance Tracking Panel:				
Able to generate Bisphosphonate Clearance Document				
Able to generate Biologic Clearance Document				
Rheumatology MIPS Dashboard	Passed	Failed	Comments	Initials
Able to view, add, or update information for each measure below (if applicable): ○ Quality Measure 39 ○ Quality Measure 47 ○ Quality Measure 110 ○ Quality Measure 128 ○ Quality Measure 139/318 ○ Quality Measure 155 ○ Quality Measure 176 ○ Quality Measure 178 ○ Quality Measure 226 ○ Quality Measure 402 ○ Quality Measure 236 ○ Quality Measure 431 ○ Quality Measure 418 ○ PI Measure: Patient Education Measure ○ PI Measure: Electronic Referral Loop NOTE: Not all measures may be able to be tested in a non-production environment (i.e. PI Measure: Sending Health Information).				
Research Template	Passed	Failed	Comments	Initials
Able to enroll patient in a new clinical trial				

Verify Clinical Trial alert displays accurately on the Research-TSI template				
Able to document patient as a clinical trial candidate and task to appropriate team/person NOTE: Tasking rules should be routed as specified on TSI RHE Set Up form.				
Able to use My Phrases in the Provider and Nurse comments sections				
Provider Test Action	Passed	Failed	Comments	Initials
Able to view patient appointments by select "View Appointment" button				
Able to view, add, or update preferred pharmacies from the Contact Information panel				
Verify Health Monitor fields are displaying data accurately				
Verify data displaying accurately in all sections of the Labs | Diagnostics | Communications panel				
Able to document and complete Provider Test Action workflow and able to generate Provider Test Action document				
Able to generate customized lab letters using "Lab Letter" My Phrase type on the Custom Lab Letter panel				
Patient Task History	Passed	Failed	Comments	Initials
Able to launch Patient Task History Template from the Patient Demographics Tab of the History Tool Bar				
Able to view all tasks for a patient in the grid				

Able to filter tasks by: ○ Encounter ○ Non Encounter ○ Read ○ Unread				
Able to sort tasks by various options in ascending and descending order				
Verify all data displays accurately within the grid				
Practice Orders Console	Passed	Failed	Comments	Initials
If practice uses Future/Recurring Orders in the Orders Module:				
Able to manage future/recurring orders in the Orders Module panel				
Crystal Reports	Passed	Failed	Comments	Initials
Able to generate Missing Chart Note Report				
Able to generate Unsigned Chart Note Report				
Able to generate Pending Orders by Appointment Date Report				

6.2021.1 Upgrade & TSI 2022 Rheumatology Content Testing Checklist

CONFIGURE/TEST

Avoiding disaster - Test, test, then test some more

EHR Customizations	
Customization Status	Initials
I have discussed customizations with my TSI Upgrade Specialist and evaluated our practice's need for customizations in 6.2021.1 and 2022 Rheumatology Content. Based on this evaluation (mark ONE response only): ☐ We do not need any customizations completed prior to the 6.2021.1 upgrade and 2022 Rheumatology Content. ☐ 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. We are aware that any customizations performed may need to be re-performed during future upgrades and that work performed to recreate these customizations will be billable at the standard hourly rate. ☐ We will complete our own customizations prior to the 6.2021.1 upgrade. We are aware that any customizations performed may need to be re-performed during future upgrades.	
I understand that any customization requests submitted after go live on 6.2021.1 and 2022 Rheumatology Content will be addressed through the standard development request process.	

Testing of EHR Customizations (if applicable) ***This section is to be filled out AFTER requested customizations have been completed in your Test Environment***				
Custom Templates/Documents	Passed	Failed	Comments	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)				

6.2021.1 Upgrade & TSI 2022 Rheumatology Content Testing Checklist

CONFIGURE/TEST

Avoiding disaster - Test, test, then test some more

Before Go Live on 6.2021.1 and 2022 Rheumatology Content	
Description	Initials
I understand that:	
• All EHR documents should be generated for all encounters by close of business on upgrade weekend	
• All items in PAQ should be signed off on by close of business on upgrade weekend	
• All Document Management batches should be filed by close of business on upgrade weekend	
• All Patient Portal messages should be accepted/denied by close of business on upgrade weekend	
• All eRx requests should be accepted/denied by close of business on upgrade weekend	
• All NextPen forms should be accepted/denied by close of business on upgrade weekend	

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

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.)