

interRAI Annual Software Upgrade 2016:

What you need to know and what's changing

Information for assessors and managers

When is the upgrade happening?

Depending on which part of the country you are in, the upgrade will be occurring on either 28 October or 4 November 2016.

FROM 5PM, FRIDAY 28 OCTOBER

Auckland
Counties Manukau
Waitemata
Northland
Canterbury
South Canterbury
West Coast
Southern
Nelson Marlborough

FROM 5PM, FRIDAY 4 NOVEMBER

Bay of Plenty
Lakes
Tairāwhiti
Taranaki
Waikato
Capital and Coast
Whanganui
Hawke's Bay
Hutt Valley
Mid Central
Wairarapa

Important things to note:

- interRAI **will not be available** while the upgrade is being completed. The service desk will send out a notice when the upgrade is occurring and when it is complete.
- Please make best efforts to **ensure that all draft assessments are finished and marked complete before 5pm** on the day of your region's upgrade.
- **LONG TERM CARE FACILITIES** – please make special note of the information provided regarding the **facility/agency identifier**.

Understanding the changes

For **Aged Residential Care facilities**, please read the following information carefully.

For **DHBs**, TAS Educators, DHB Lead Practitioners and NASCs without a Lead Practitioner have now all been taken through the planned software upgrade changes – particularly noting the new outcome measures for home and community care assessors. Read the following information carefully.

DHBs can also find [a checklist to prepare for the upgrade here](#).

WHERE CAN YOU GET HELP?

If you have any queries please contact your service desk.

For South Island, Auckland and Northland: phone (03) 378 6555

For the rest of New Zealand:
Phone (06) 753 7766.

All upgrade notices can be found on the website [here](#) and the 2016 software upgrade is also in the [News section](#)

Outline of changes

Contents

General interRAI changes (LTCF and Home Care)

Ability to discontinue draft assessments

Facility / Agency Identifier

Falls Tracking

Wound Assessments

Delete old Photos of residents

Weight, Vital Signs and Care Plan Outcomes Reports

Categories for Progress and Continuation notes

New/updated Functions for Home Care

APPENDIX 1: INFORMATION ON SOFTWARE SPECIFICATIONS AND DEVICES

APPENDIX 2: INFORMATION ON USING PDF's ON MICROSOFT EDGE BROWSER

NEW FEATURES AND CHANGES

General interRAI changes

Long term care

Item	notes
1.	Validation for the minutes responses in section O3 increased to 9999 from 999
2.	The Mood CAP has updated descriptions to level 1 – medium risk and level 2 – high risk
3.	The pressure ulcer CAP has been updated (Bladder Continence no longer contributes to level 3 trigger)
4.	Replaced the word locomotion with mobility in G1f

Home care and Community Health Assessment (CHA) and functional supplement (CHA+FS)

Item	Notes
1.	Validation for the minutes responses in section P3 (home care) and P4 (Community Health + Functional Supplement) increased to 9999 from 999
2.	There are three new outcome measures associated with the home care, CHA and CHA+FS as follows: <ul style="list-style-type: none">• Deaf/blind severity index• IADL Capacity Hierarchy scale• Functional Hierarchy scale Scores are not calculated for historic assessments
3.	The Mood CAP has updated descriptions to level 1 – medium risk and level 2 – high risk
4.	Replaced the word locomotion with mobility in G2f

ED Screener

Item	Notes
1.	The urgency score now includes the 'self reported mood – sad' item

Ability to discontinue draft assessments

Assessors can now discontinue draft assessments:

- (a) You have an old historical assessment left in draft that cannot be marked complete
- (b) If the assessor opened a draft assessment by mistake
- (c) If the client declines a further assessment or

To discontinue a draft assessment, highlight the draft assessment in the MDS summary page and then click on the discontinue button.

The screenshot shows the MDS summary page with a table of assessments. The 'Discontinue Assessment' button is highlighted with a red box. The table has columns: View, Reference Date, Assessment, Status, Last Modified Date, CAPS, and QI. The first row is highlighted in orange and shows a 'Draft' status.

View	Reference Date	Assessment	Status	Last Modified Date	CAPS	QI
View	16-05-2016	HC Assessment version 9.3 New Zealand customisatio...	Draft	16-05-2016 08:47 PM	CAPS	
View	13-05-2016	HC Assessment version 9.3 New Zealand customisatio...	Complete	15-05-2016 11:30 PM	CAPS	
View	16-05-2016	Contact Assessment version 9.3	Discontinued	16-05-2016 10:16 PM		

The Assessors **must** add a note to the discontinued assessment stating the reason why the assessment was discontinued.

To do this, select the discontinued assessment on the MDS summary tab and click on view.

The screenshot shows the 'View a Historical MDS' page. The 'MDS' tab is highlighted with a red box. The 'View' button for the discontinued assessment is also highlighted with a red box. The table shows a list of assessments with columns: View, Reference Date, and Assessment. The first row is highlighted in orange and shows a 'Discontinued' status.

View	Reference Date	Assessment
View	30/06/2016	LTCF Assessment version 9.3 Ne
View	01/06/2015	LTCF Assessment version 9.1
View	11/02/2014	LTCF Assessment version 9.1
View	14/11/1961	LTCF Assessment version 9.1

On the form summary page you will a note widget called **‘form status’**

Click on this and add a note to describe why the assessment was discontinued then click save and return

The screenshot shows the 'Form Summary' page with a red box highlighting the 'Form Status' dropdown menu. The menu is open, showing the 'Discontinued' option. The page includes a navigation bar with tabs like 'Case Activity', 'Forms', 'Care Plan', 'MDS', 'Continuation Notes', 'QIs', 'CAPs', 'Outcomes', and 'Fill out a Form'. Below the navigation bar are buttons for 'Return', 'Save as Draft', 'Clear Data', 'Check for Errors', 'Clear Errors', and 'Mark Complete'. The 'Form Summary' section displays the 'Description' as 'HC Assessment version 9.3' and the 'Last Modified Date' as '16-05-2016 10:21 PM'.

This note pad will display as ‘yellow’ once a note has been added

The screenshot shows the 'Form Summary' page with a red box highlighting the 'Form Status' dropdown menu. The menu is open, showing the 'Discontinued' option. The page includes a navigation bar with tabs like 'Case Activity', 'Forms', 'Care Plan', 'MDS', 'Continuation Notes', 'QIs', 'CAPs', 'Outcomes', and 'Fill out a Form'. Below the navigation bar are buttons for 'Return', 'Save as Draft', 'Clear Data', 'Check for Errors', 'Clear Errors', and 'Mark Complete'. The 'Form Summary' section displays the 'Description' as 'HC Assessment version 9.3' and the 'Last Modified Date' as '16-05-2016 10:21 PM'. The background of the 'Form Status' dropdown menu is yellow.

The assessment is still able to be read.

No CAPs or Outcomes are calculated for discontinued assessments nor do they appear on client summary reports or trend reports.

Error Selected Form

Discontinue Assessment

Assessment	Status	Last Modified Date	CAPS	QI	Outcomes
CHA 9.3.1	Discontinued	16-05-2016 10:16 PM			
HC Assessment version 9.3 New Zealand customisatio...	Discontinued	16-05-2016 10:21 PM			
Contact Assessment version 9.3	Discontinued	16-05-2016 10:16 PM			
HC Assessment version 9.3 New Zealand customisatio...	Complete	15-05-2016 11:30 PM	CAPS		Outcomes
Emergency Department Screener version 9.3	Complete	11-05-2016 03:20 AM			Outcomes

No information from the discontinued assessment is copied forward to the next assessment.

Once discontinued, assessments **cannot** be made draft again.

Facility / Agency Identifier

All assessments will now have the organisation/facility number automatically populate the assessment. Assessors will not need to type in this information.

FACILITY/AGENCY IDENTIFIER	<div>a. Facility Name</div> <div>NZ HC Testing Facility</div> <div>b. Facility Number</div> <div>G00026-A</div>
ELIGIBILITY FOR PUBLICALLY FUNDED HEALTH SERVICES IN NEW ZEALAND	<div>a. New Zealand resident / citizen</div> <div><input type="radio"/> 0. No</div> <div><input checked="" type="radio"/> 1. Yes</div> <div><input type="radio"/> 11. Unknown (First Assessment only)</div>

NB. If an assessment is in 'draft' status before the upgrade and **section A** is 'marked complete', this section will **need to be re-opened** for the organisation/facility number to automatically populate the assessment after the upgrade.

If this step is not followed the assessment will *error* due to the facility/agency number needing to populate the assessment.

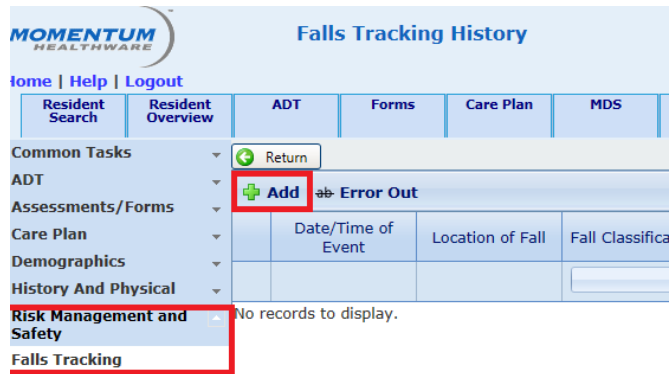
Note that all residential care organisations have HPI numbers, however, newly built facilities may not get their HPI number in time prior to being set up on the system and having residents admitted.

Facilities should request their HPI number using this email **HI_Provider@moh.govt.nz**

Falls Tracking

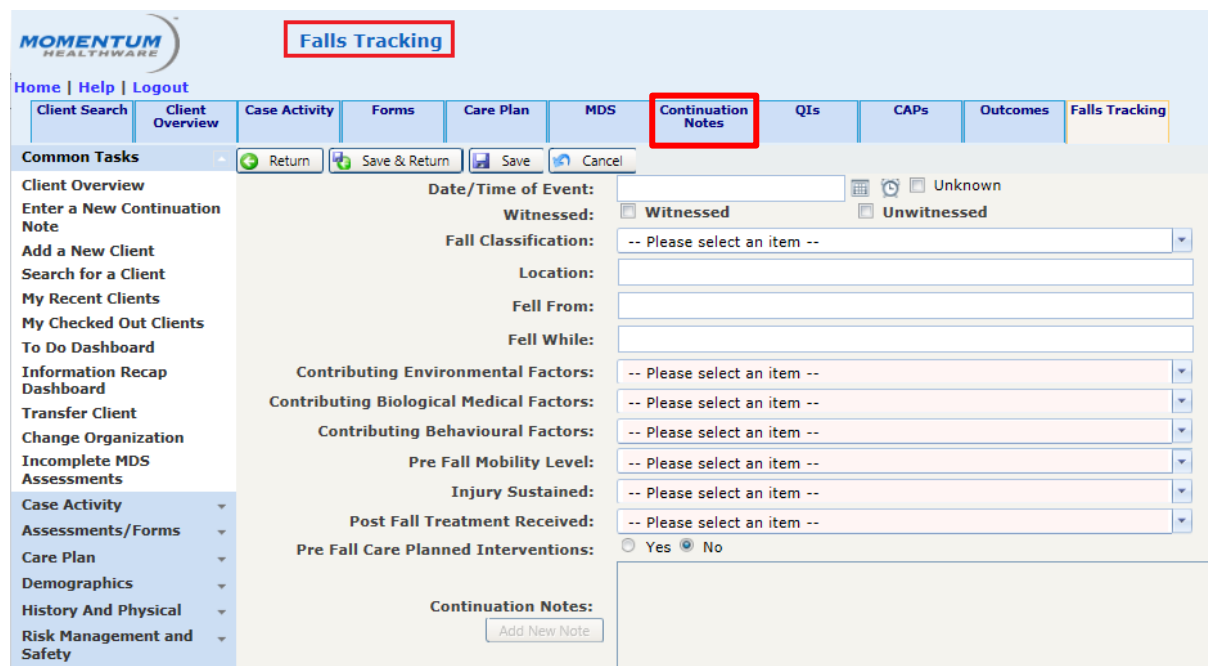
A new option in both Community and Residential offices is the ability to track a person's falls history.

Select the "Falls Tracking" option under the 'Risk Management and Safety Menu on the left of your screen then "ADD":

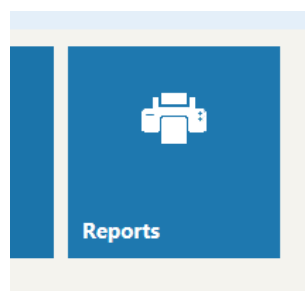


The Falls Tracking screen will open and assessors can enter information relating to the Fall.

Notes can be added and will be viewable on the Progress notes/ Continuation notes tab.



The Falls Tracking report can be selected from the Reports menu on the software log in home page:



The report can be viewed in PDF or Excel format

Falls Tracking History

Return

Zoom

ity

Generated By: User1280026 Test

Falls Tracking History Report

Unit: All

Provider:

Start Date: 04/05/2016 End Date: 17/05/2016

Date:Time	Location	Classification of Fall	Pre Fall Care Plan	Behavioural Factors	Environmental Factors	Biological Factors	Injury Sustained	Post Fall Treatment Received
NZ Long Term Care Testing Facility								
test1280026, ltc notes 16/05/2016 12:00 AM	bathroom	fall on and from stairs and steps	No	History of previous falls; Polypharmacy / multiple prescriptions	Flooring; Handrails	Impaired control of balance or gait; Muscle weakness / reduced physical fitness	Open Wound	Treated at home

Wound Assessments

There is now the ability to add ongoing wound assessments to wounds that have already been added in the wound module (some organisations add wounds here and use this information to populate section L of the interRAI residential care assessment).

To add a wound assessment, click on **'add wound'** for the wound that you have already entered.

The screenshot shows the 'Wound Assessments' section of a software interface. A red box highlights the 'Add' button and the table below it. The table has columns for 'Assessment Date / Time', 'Wound Size (L W D)', 'Exudate type', and 'Current w'. One row is visible with the date '12/05/2016 12:00 AM', size '12.00 x 12.00 x 12.00', exudate type 'Purulent', and current wound 'Stage 1'. Above the table, there are fields for 'Co-morbidities', 'Description', 'Entered By', 'Entered Date', 'Last Modified By', and 'Last Modified Date'. A diagram of a human leg is visible on the right side of the interface.

Assessment Date / Time	Wound Size (L W D)	Exudate type	Current w
12/05/2016 12:00 AM	12.00 x 12.00 x 12.00	Purulent	Stage 1

The edit wound screen opens with various assessment parameters to complete.

The screenshot shows the 'Edit Wound Assessment' screen. It has a header bar with tabs for 'ADT', 'Forms', 'Care Plan', 'MDS', 'Progress Notes', 'Physician Orders', and 'QIs'. Below the header are buttons for 'Return', 'Save & Return', 'Save', and 'Cancel'. The main form area contains several sections: 'Assessment Date / Time' with a date and time picker; 'Wound Size' with fields for 'Length (cm)', 'Width (cm)', 'Depth (cm)', and 'Wound Shape'; 'Evidence of Healing' with fields for 'Wound Colour', 'Granulation tissue present', and 'Epithelialization'. Each field has a dropdown menu or a text input field.

Assessors can add notes and upload pictures of the wound as well. Any notes added will also be viewable on the progress notes tab in the same way that any notes added within a care plan, (if used), can be viewed on the continuation notes tab.

The left screenshot shows a form with the following sections:

- Contributing Factors**: Two dropdown menus labeled "Systemic factors affecting healing" and "Environmental factors that may affect healing/cause".
- Treatment**: A text input field labeled "Treatment" and a "Notes" section with an "Add New Note" button.

The right screenshot shows a photo upload interface with the following elements:

- A large placeholder box for a photo.
- Instructions: "Please click the button below and select a new photo. Then click the 'Upload' button to see the new photo."
- Buttons: "Browse..." and "Upload".
- A "Last Modified By" field.

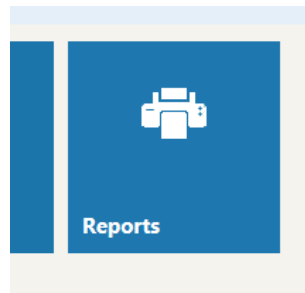
Delete old Photos of residents

There is now the option to delete old photos of residents rather than overwrite them with new photos.

The screenshot shows the photo upload interface with a red box highlighting the "Delete" button in the top toolbar. The toolbar also includes "Return", "Save & Return", "Save", "Cancel", and "Delete" buttons. The main area contains a placeholder for a photo and instructions: "Please click the button below and select a new photo. Then click the 'Upload' button to see the new photo." Below the instructions are "Browse..." and "Upload" buttons.

Weight, Vital Signs and Care Plan Outcomes Reports

There are three new reports that can be accessed via the reports module.



Weight and vitals signs

This gives a summary of height/weight/BP and so forth as per example report below:

Weight and Vital Signs For LTC Training Practice office

Last Name: All
Status: All

Last Name: All
From: 06/10/2015

Primary Id: All
To: 25/07/2016

	Weight (Kg)	Blood Pressure	Temperature (C)	Pulse (bpm)	Respiration (rpm)
YYY9999 - test, test					
05/07/2016 03:03 p.m.	100	160/80	36	160	5
05/07/2016 03:05 p.m.	100	160/80	36	160	5

Weight change indicator report

Gives a summary of % change in weight as per the example below.

Weight Change Indicators

From: 25/07/2015

End: 25/07/2016

Weight Change Summary for

of End Date Records: 15

% of Records Decreased Weight: 20%

% of Records Increased Weight: 13%

% of Records with No Change: 0%

Unit:

Name	Previous Date	Weight	Current Date	Weight	% Change
<input type="text"/>	24/11/2015	69.4	16/05/2016	70	+1%
	26/07/2015	59	07/02/2016	58	-2%
	-	-	05/04/2016	38	-
	27/09/2015	49	13/04/2016	52	+6%
	-	-	09/04/2016	61	-

Care Plan outcomes Report

There is a new care plan report that displays the care plan focus with its associated goals, achievements and comments associated with achievements or not of those goals. To access the report, click on the 'Selected Care Plan Expected Outcomes report' link

Care Plan	Active	08/05/2016	
View Care Plan List Add a New Care Plan Care Plan Summary View Evaluate Outcomes Selected Care Plan Report Selected Care Plan Expected Outcomes Report	Add New Focus Copy Focus Delete Focus		
	Start Date	Resolved Date	Focus
	08/05/2016		ADL function- Bed mobility assistance required; Bathing
	08/05/2016	08/05/2016	Behavioral symptoms- Repetitive statements/verbalization

The following report will display.

Return	Zoom
Residential Care Plan Expected Outcomes Report	
NZ Long Term Care Testing Facility	
Resident: testing, 1280026resident Unit/Room: West Wing14 - B Care Plan Start Date: 08/05/2016 Care Plan End Date:	Care Plan Print Date: 07/06/2016 10:39 PM Status: Active
Focus	Start Date: 08/05/2016 End Date:
ADL function	
Outcomes	Start Date: 08/05/2016
Resident will have total care with ADL's provided by staff to maintain or improve, if possible, current level of functioning for next 90 days.	
Evaluation Date	Evaluation Status
29/05/2016	Partially Achieved
Comment	comment 1
Outcomes	Start Date: 08/05/2016
test obj	
Evaluation Date	Evaluation Status
22/05/2016	Not Achieved
Comment	comment 2

Categories for Progress and Continuation notes

If your organisation uses the continuation or progress notes tab, there are two additional categories and now match those used in the residential care sector. When a continuation note is saved, notes of similar types can be filtered for review afterwards, e.g. reviewing all notes associated with falls or wound tracking.

The screenshot shows the 'Progress Notes Details' form. At the top, there is a toolbar with buttons: Add New Note, Copy, Delete, Save & Return, Save, Save as Draft, Return, and Print. Below the toolbar, the 'Effective Date' is set to '25/07/2016 11:55 AM'. The 'Entered by' field is 'Downes, Andrew National interRAI service' and the 'Entered for' field is 'Downes, Andrew National interRAI service'. A text box below these fields contains the message: 'Adding new notes now has categories to help filtering for notes to review after they have been saved'. On the right side, there is a 'Category' dropdown menu. The menu is open, showing a list of categories: '-- Please select an item --', '-- Please select an item --', Allied Health, Care plan, Client/family contact, **Falls tracking**, Level of Care changes, Medical correspondence, Providers, Record administration, Registered nurse, Review, Service coordination, **Transfers**, and **Wound tracking**. The 'Falls tracking' and 'Wound tracking' options are highlighted with red boxes. Below the form, there is a section labeled 'Addendums'.

CATEGORY	DEFINITION
Level of Care Change	Action taken. Rationale as per local guidelines
Transfers	interNASC; DHB offices: NASC and ARC offices
Service Coordination	Comments/ record of service allocation.
Client/family contact	All incoming and outgoing communication with client or their family.
Review	NASC service review outcome or identifying completed form for reading
Providers	ALL agencies providing input to clients, funded and Non-Governmental organisations
Allied Health	ALL health professionals (wide scope).
Registered Nurse	Practice Nurses / Gerontology Nurses
Medical Correspondence	GP / Psychiatrist reports /medical information.
Falls tracking	Falls notes form the Falls tracking module

Wound Care tracking	Wound care Module notes for the Wound care module LTCF Only
Care Plan	Care plan information LTCF only

For those organisations that use the care plan module, as well as linking notes to a care plan focus, a category will need to be selected as well. If no category is a good match then use the generic 'care plan' category.

New/updated Functions for Home Care

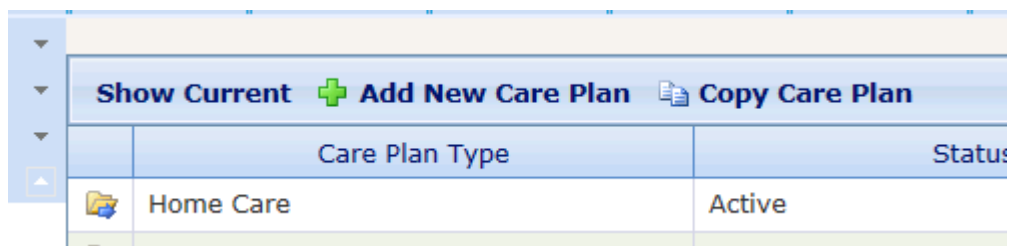
Mobile check in check out


This is now supported on Windows 10 devices and the Edge browser. Users may prefer to use IE11 rather than Edge (IE11 does come installed as part of the Windows 10 operating system, ask your IT support for advice if you have difficulties using the Edge browser).

Mobile check in check out is also now supported on Microsoft tablets that run Windows 7/8.1 (**not “RT” version**).

Add button for home care care plans

To reduce incidences of home care care plans being opened by mistake, when browsing to the home care care plan tab, there is now an additional ‘add’ button to click on to create a new draft care plan.



Show Current + Add New Care Plan Copy Care Plan		
	Care Plan Type	Status
	Home Care	Active

APPENDIX 1: INFORMATION ON SOFTWARE SPECIFICATIONS AND DEVICES

- 1) Browsers and devices supported
 - a. Internet Explorer

The application is optimised to support the following minimum screen resolutions:

- 1024x768 (4:3 screen format)
- 1366 x 768 (wide screen format)

Browsers and devices now supported

1. Microsoft internet Explorer IE 9,10,11 and Edge are now supported on Windows 7, 8.1 and Windows 10 laptops and tablets down to 10 inch display size are supported (Reference tested on Windows 7 professional, Windows 8.1 and Windows 10 laptops. For home care users please note that check in check out is supported on Windows 7/8.1/W10 and Windows tablets but not RT)

Please ensure that all latest Microsoft Patches are installed for versions of operating systems/browsers you are using

2. Android 10" tablets are supported using most recent operating system and Chrome browser version (Reference tested on Google nexus 10 device)

(a) Use of analytics/data warehouse not supported on Chrome/Android devices

3. Apple iPad tablets running latest operating system and latest Safari Browser version (Reference tested on Apple iPad Air and Apple iPad devices)

(b) Use of analytics/data warehouse not supported on Safari/iOS/Mac devices

Please note that although different combinations of browsers and devices/operating systems may work, the combinations that have official support are the browser and its associated 'home' operating system; Internet Explorer and Windows, Safari and iOS, Chrome and Android.

Please note that the multi-browser/device support means browsers must NOT be set to use compatibility/quirks mode. If a browser is set to compatibility/quirks mode you will not even be able to log in. To change this setting in Internet Explorer, go to the Tools menu and select the View Compatibility Settings and make sure that compatibility mode is not set for the interRAI sites that you use. Please contact your IT support for advice on these settings.

2) Use of 10" Class Touch Screen Devices e.g. iPads etc.

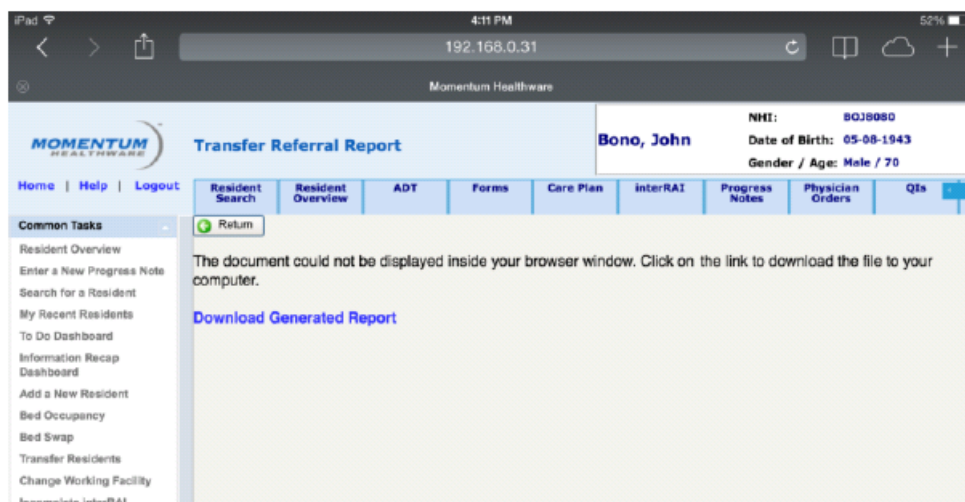
For those organisations that are thinking of using smaller size touch screen devices and personal computing devices such as iPads we strongly encourage you to take the time to understand your workflow and the best way to use these sorts of devices related to your workflow. Pilot them if you can as part of your decision making. For example, any screen in the application that has lots of grids in it, e.g. the care plan module, can be tricky to use on small touch screen devices as compared to completing an assessment form on a device with larger screens. Therefore you may find these devices easier to use in some situations rather than others. We do not recommend care planning on smaller devices as the screen size is small and can be tricky to use for novice users.

If using these devices, you may need to be able to create and provide screen shots to us if there is a problem that we need to assist with. Each device has a specific way of creating and managing screen shots, you will need to refer to the manufacturers' website/user guides on how to do these.

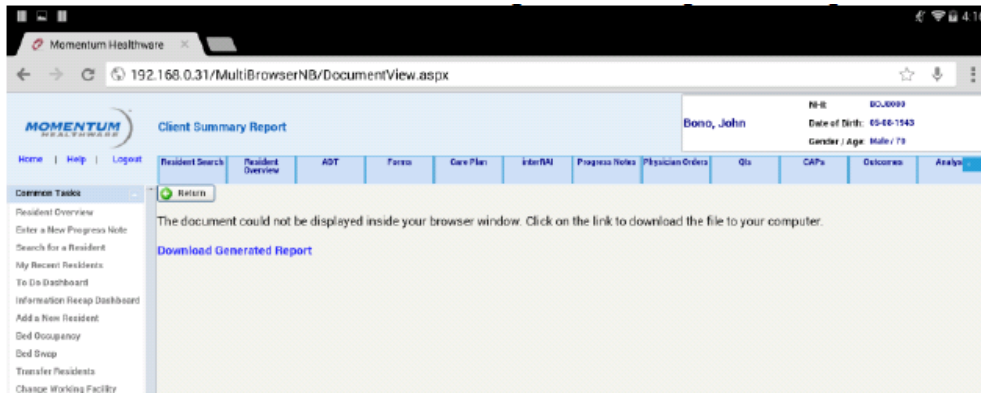
If the device supports use of client side certificates, each device will have a different way of managing these. Again you will need to refer to manufacturers' website/user guides for this.

3) Running reports

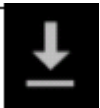
When running a report using an iPad you will see the report page appear with instructions to download the report. When you click on the 'download generated report' link the report will open in a new tab.



When running a report using a Chrome/Android device, you will see the report page appear with instructions to download the report. Click on the link to download the report.



The report will show in the download area of the screen. Look for this icon in the top left of the screen



To open the report tap on the download icon, this will expand to show you the list of recent downloads. Tap on the listed report to open it. The report will open in a new window. To return to the application you will need to click on the return button on the screen.

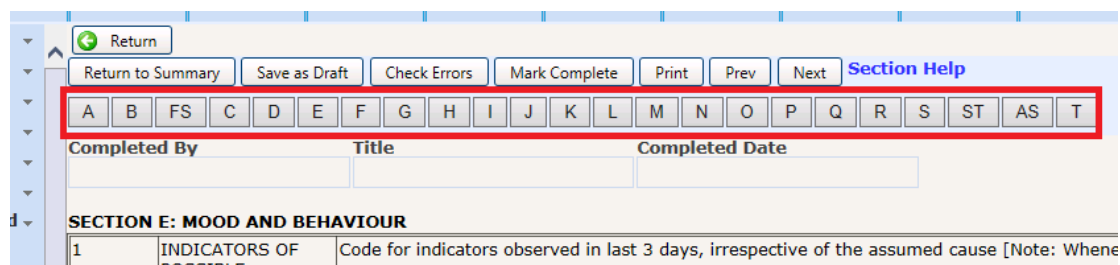


Make sure you delete the report from the downloaded list after you have finished.

Known Items that will be addressed in future releases

iPad - Scrolling on iPad devices

Due to a problem understood to be associated with the Safari browser for iPads, the 'quick navigation' buttons within the assessments, shown in the screen shot below, have needed to be removed in order to allow optimum scrolling and function/use of assessment error message links.



To assist with scrolling between assessment sections, assessors should either:

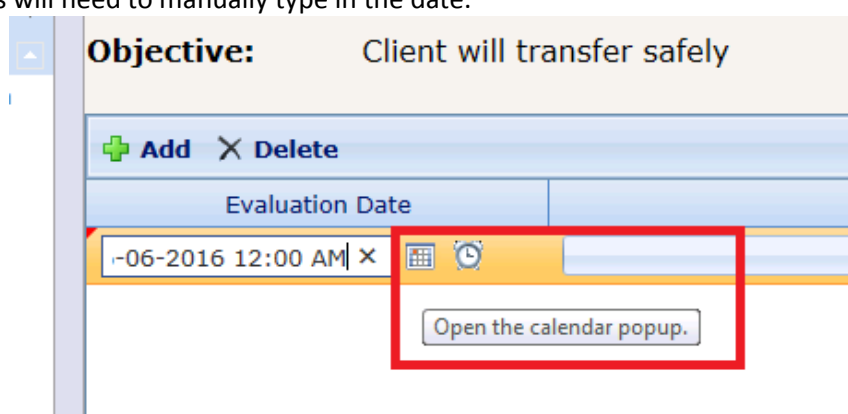
- 1) Use the next/previous buttons or
- 2) Click on 'return to summary' and select sections as required

Users may also find scrolling in longer assessment sections quite slow, e.g. section G, especially if after saving the section there is an error message related to one of the assessment answers.

This will need to be resolved by updates to the Safari Browser and or iPad operating system. Once resolved in the Safari browser/iPad operating system, the quick section navigation will be able to be made available again at the next release of the national interRAI software system.

a) iPad - date picker in objectives evaluation screen in care plan

The date picker in the care plan objective calendar 'pop up' does not open. To add an evaluation date assessors will need to manually type in the date.



At this point, it is unclear if this is related to the Safari Browser or related to the combination of this particular brand of web page controls¹. The resolution will require either an upgrade of the Safari browser or an upgrade to this particular brand of web page controls.

¹ Web page controls are things like calendar pop-ups, drop down list functions which are produced by 3rd party suppliers and used by software designers in their products

APPENDIX 2: INFORMATION ON USING PDF's ON MICROSOFT EDGE BROWSER

Viewing pdfs when using the Microsoft edge Browser

Please ensure you have the following media feature pack installed <https://support.microsoft.com/en-us/kb/3099229> if you are using a Windows 10 device with the edge Browser. If not you will see the following error when trying to open pdfs with the Edge Browser



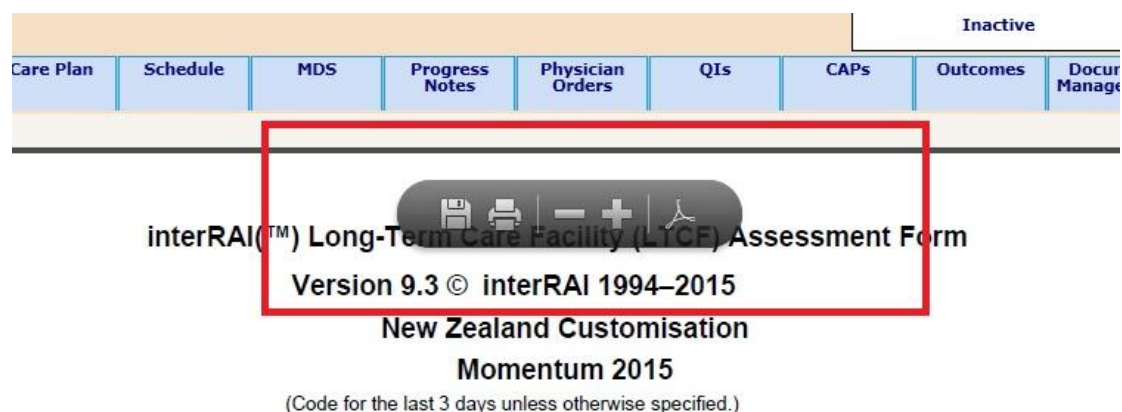
Something is missing

To view a PDF, you need some media functionality that you don't currently have. You can install the Media Feature Pack to view this PDF.

- [Go back to the last page](#)

Using pdfs when using the Microsoft Edge Browser

As at the time of writing these notes, the Edge Browser does not present the user with the normal sorts of functions/controls that you might be used to seeing with other browsers. For example, the Edge browser does not allow users to magnify or decrease the resolution of the pdf that you are viewing. In other browsers you will see similar icons as per the screen shot below if you mouse over the top area of the pdf, these allow you to print, save and magnify the pdf



\

When using Edge, these icons do not present when you mouse over the top of the pdf, as per the screen shot below.

Notes	Orders		
interRAI(™) Long-Term Care Facility (LTCF) Assessment Form Version 9.3 © interRAI 1994–2015 New Zealand Customisation Momentum 2015 (Code for the last 3 days unless otherwise specified.)			

If you want to save or physically print the pdf from Edge, right click anywhere in the pdf and you will see a 'save' prompt appear. Click on this and then save the pdf.

Progress Notes	Physician Orders	OTs	CAPs	Outcomes	Document Management
interRAI(™) Long-Term Care Facility (LTCF) Assessment Form Version 9.3 © interRAI 1994–2015 New Zealand Customisation Momentum 2015 (Code for the last 3 days unless otherwise specified.)					
					Save as

Information

First name

438003201 AU DIA