

interRAI Implementation checklist

MOMENTUM SOFTWARE UPGRADE 2016

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1 Overview

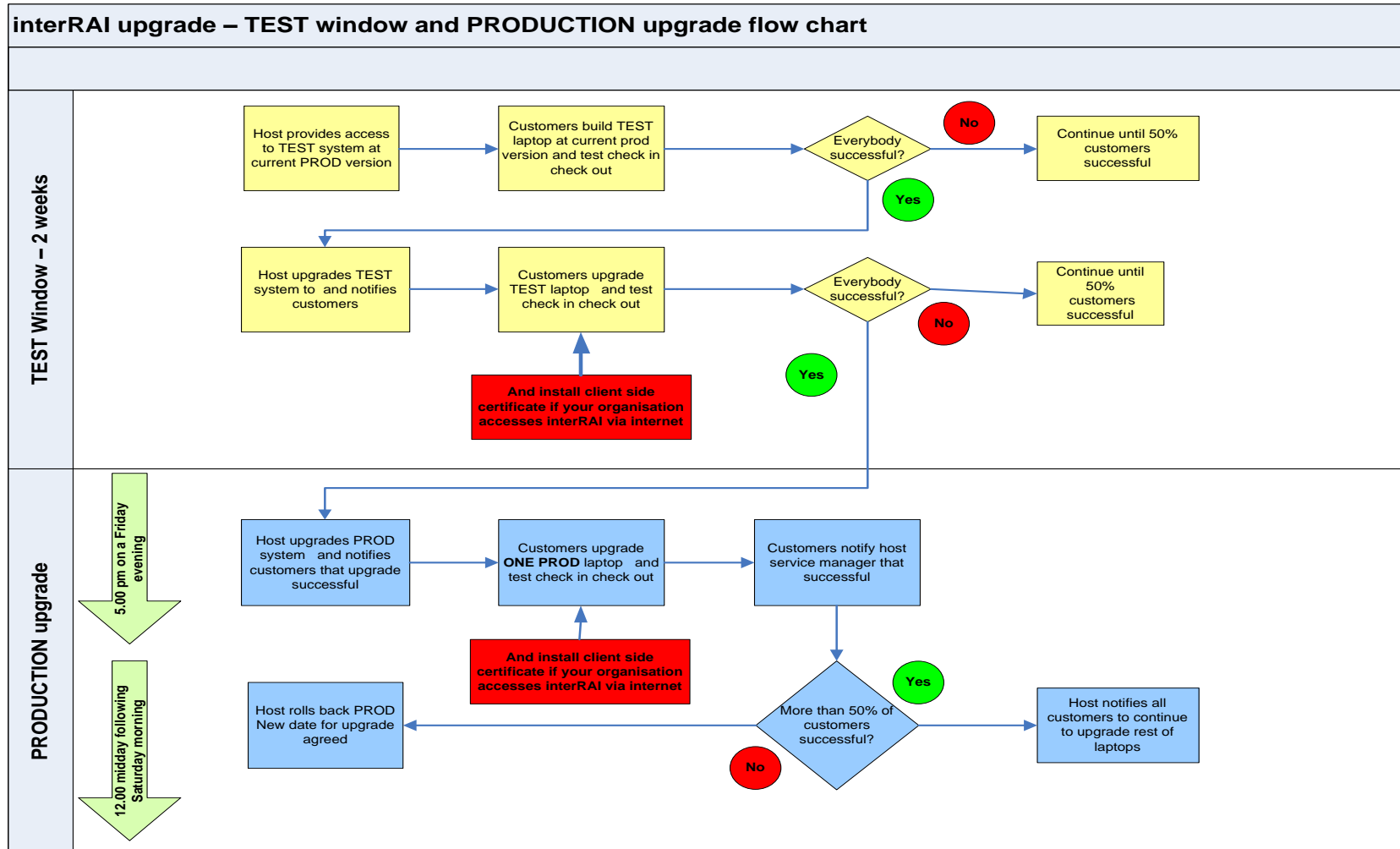
This plan/checklist provides guidance/a template for hosted organisations to develop their local implementation tasks to upgrade any laptops that use the Momentum Healthware software for interRAI. As timelines become clearer you will need to add these to the appropriate places within this plan and of course add more tasks that may be required for your local processes at upgrade.

Please pay special attention to the roll back section noted in the assumptions and in the schedule template.

2 Assumptions

- Both host sites will make a TEST instance accessible via both secure connected health connections and secure internet for a three-six week window to allow customer sites to test installation and connection to their host prior to 'move to production'
- The wiki will be used to allow selected customer ICT staff to download their upgrade package.
- The CDHB TRAINING instance will be upgraded at the earliest opportunity to allow lead practitioners and systems clinicians to train their staff in new functions
- During the actual PRODUCTION UPGRADE a roll back period will be available and will need to be tightly managed. The roll back period will be managed thus:
 - The host will upgrade on a Friday evening
 - Hosted customers will be advised to upgrade a single laptop on the Saturday
 - The host will communicate a successful central upgrade to customer sites on the Friday evening
 - On the following Saturday morning from 9.00am to 12.00am hosted customer sites will be expected to upgrade one laptop and demonstrate that they can connect to the central host and successfully complete a check in check out
 - During this time the application is only to be used by technical staff for installation testing supported by lead practitioners and system clinicians
 - As customer sites complete this successfully, they will need to contact Andrew (National interRAI service manager) by phone on 027 501 0397 or email Andrew.Downes@healthshare.co.nz and confirm that one device is working successfully
 - When >50% of customer sites have acknowledged that they one device working post 'move to production' then a roll back period will be deemed to have expired and customers will be advised to proceed to upgrade the rest of their devices
 - If 'roll back' is required, then:
 - for customer sites this is an uninstall and re-install of one device
 - for the central host this is a restore of the previous version
 - for users this means a prolonged outage until the central host is restored back to the previous version

3 High level flowchart



4 Template schedule/checklist

	TESTING interRAI upgrade	Notes and resources (please add in any useful notes for your local implementation)	dates	Person responsible
1.	Confirm at DHB/NGO level who are the service managers of interest who need to be aware and involved in planning			
2.	Confirm one or two people to coordinate comms across services and any planning			
3.	Advise A Downes of any people, DHB or NGO, that specifically should be included in services desk notices from the host (emails required)			
4.	Communicate to all DHB services and contracted NGOs that the upgrade season is in flight and that they should be arranging plans as per notices from the interRAI service desk			
5.	Ensure that local IT support are enrolled to support the upgrade if required. Both at DHB and NGO level			
6.	Ensure changes for the upgrade have been communicated to DHB/NGO staff and that any orientation/training is planned/scheduled			
7.	Follow upgrade update notices from host to ensure staff aware of key dates			
8.	Test upgrade of one laptop and test that this laptop can successfully check in and check out. Some organisation will prefer to manually upgrade, some will package and deploy, Ensure you have installed client side digital certificates if in central or midland DHB regions			
9.	Confirm to Andrew Downes (National interRAI service manager) that one laptop has been successfully upgraded and can check in check out	Tel 027 501 0397 or andrew.downes@healthshare.co.nz		

10.	Ensure that there is a plan to access the TRAINING system to orientate users to new functions			
	interRAI upgrade– move to PRODUCTION			
11.	Ensure NGO services have plans in place for their upgrade			
12.	Ensure all DHB/NGO services are aware of planned production upgrade dates/times			
13.	Ensure IT support is lined up if required for both DHB and NGO			
14.	Audit system in run up to upgrade to ensure that minimal records are checked out and minimal draft assessments. Follow up with assessors as required for both DHB and NGO			
15.	On day of upgrade - local user notification - advise local users that upgrade to their laptops will be completed TODAY. Advise that ALL records should be checked back in before the upgrade.			
16.	Ideally run checked out record report on day of upgrade and ensure all records are checked back in in the afternoon			
17.	Ensure devices are collected to central point for upgrading if need be or all connected to network port for 'packaged' upgrades that are pushed out	Some devices may need settings such as 'standby' adjusted so that they are not dormant for upgrade packages that are pushed out		
	Start of central host upgrade process			
18.	National host will remove access to the PRODUCTION system and complete upgrade			
19.	Local organisation to upgrade one device only to new version. Ensure client side digital certificates installed if in central and midland region DHBs			
	Start of process to confirm local DHBs/NGO/PHOs can successfully connect			

	(the roll back window)			
20.	Receive advice from national host that upgrade successful			
21.	Connect to PRODUCTION system with laptop using PRODUCTION user ID			
22.	Once one laptop has successfully connected to the PRODUCTION site and has successfully completed a check in check out – contact Andrew Downes (National interRAI service manager) 027 501 0397 or email andrew.downes@healthshare.co.nz			
23.	Wait for advice from national host before proceeding to upgrade rest of devices			
	End of roll back period and decision to proceed or roll back			
24.	Receive confirmation from national host that upgrade of rest of devices can proceed			
25.	Upgrade rest of devices as required			
26.	Advise users that they will be able to access the system again			
	Roll back process (if required)			
27.	Receive advice from the national host that <50% of organisations have been able to upgrade and that the central interRAI servers will be rolled back to previous version			
28.	Advise users that access to the system will be removed until further notice			
29.	Uninstall local device and re-install with prior version (local organisations already have this software available to them)			
30.	Wait for further notice from the national host to allow users back onto the system			