

# How to prepare for the interRAI upgrade

November 20, 2020

## Information for community assessors and NASC managers

### An upgrade is planned for 20 November 2020

The interRAI national software system (Momentum) is being upgraded on 20 November 2020. The upgrade will make it easier to work with your assessments.

### You must complete three tasks to prepare

To ensure upgrade success, we need you to run the incomplete MDS/Assessments Report, run the Checked-Out Client Record report, and review your draft items before the upgrade begins. If these actions aren't completed, you risk losing incomplete or checked out records.

## Task one: run the Checked-Out Client Record report

These steps show you how to run a report to find all your checked out records.

1. Log into Momentum and go to the **home** page

2. Click on **Reports**

2. Click on **Checked Out Client Record** report

Report Title	Report Category	
ACC CA Form V1.3	New Zealand	
ACC CHA Form V1.3	New Zealand	
ACC CHA+FS Form V1.3	New Zealand	
ADT Census Report	Integrated Report	ADT Census Report
Audit Report By Client	Integrated Report	Audit Report By Client
Audit Report By User	Integrated Report	Audit Report By User
Chart Access	Integrated Report	Chart Access Report
<b>Checked Out Client Record</b>	Integrated Report	<b>HC Checked Out Client Record</b>
Client Activity Pursuit Summary	Integrated Report	Displays the preferred activities at the selected organization.
Client Activity Pursuit Summary Detail	Integrated Report	Displays activity pursuit by client at the selected organization.

3. Choose the right **Organisation** from the dropdown box. You can also filter by **Provider**

The screenshot shows the 'Report Criteria' page in Momentum Healthware. It includes a sidebar with 'Reporting Tasks', 'Select Report', 'Change Working Organization', and 'User Preferences'. The main area has fields for 'Last Name', 'First Name', 'Record Status', 'Personnel', 'Organization' (with a dropdown menu), 'Identifier Value', 'Sort By', and 'Date Checked Out'. A 'View Report' button is at the bottom left, and a search icon is in the top right.

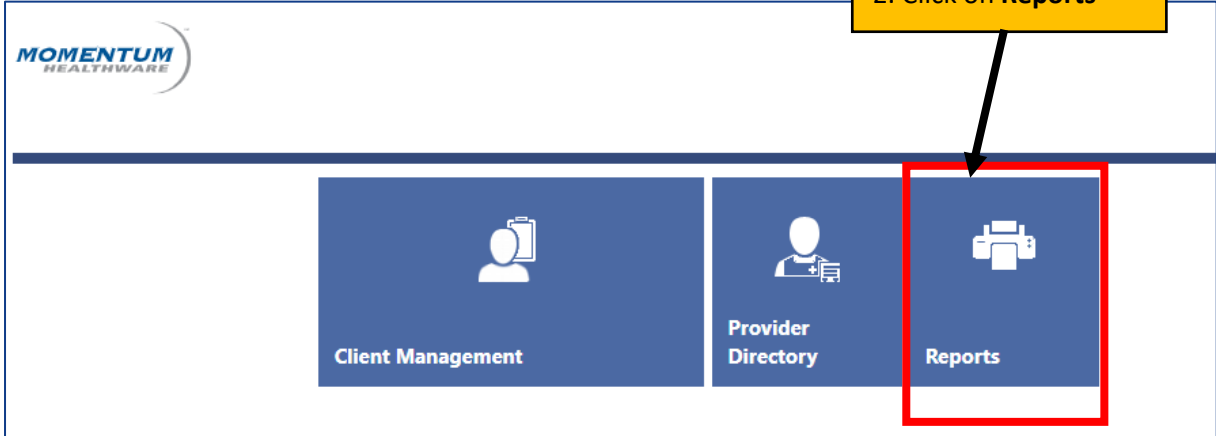
4. Click on View Report to generate

### Task two: run the incomplete MDS/Assessments Report

These steps show you how to generate a list of incomplete MDS/Assessments, so you can mark them complete, or discontinue them.

1. Log into Momentum and go to the **home** page

2. Click on **Reports**



**Select Report**

Report Title	Report Category	Description
ACC CA Form V1.3	New Zealand	
ACC CHA Form V1.3	New Zealand	
ACC CHA+FS Form v. 1.3	New Zealand	
ADT Census Report	Integrated Report	ADT Census Report
Audit Report By Client	Integrated Report	Audit Report By Client
Audit Report By User	Integrated Report	Audit Report By User
Chart Access	Integrated Report	Chart Access Report
Checked Out Client Record	Integrated Report	HC Checked Out Client Record
Client Activity Pursuit Summary	Integrated Report	Displays the preferred activities at the selected organization.
Client Activity Pursuit Summary Detail	Integrated Report	Displays activity pursuit by client at the selected organization.
Client Listing by GP	Integrated Report	Client Listing by GP
Client Listing Home Care - By ID	Integrated Report	Client Listing Report Integration.
Client Listing Home Care - By Name	Integrated Report	Client Listing Report Integration.
Client Outcome Analysis Report HomeCare	Integrated Report	Client Outcome Analysis Report.
Contact Assessment date and due date	New Zealand	
Falls Tracking History	Integrated Report	Client Fall Tracking History
Falls Tracking Monthly Summary	Integrated Report	Displays the number of falls for each fall classification by month. 12 months.
Falls with Injury Monthly Summary	Integrated Report	Displays the number of falls for each injury documented by month. 12 months.
Incomplete Assessments Report	Integrated Report	Incomplete Assessments Report

2. Click on **Incomplete Assessments Reports** from the list

3. Choose the right **Organisation** from the dropdown box. You can also filter by **Provider**

**Report Criteria**

Organization: Training Practice office CDHB

Provider: All

View Report as: PDF

4. Click on **View Report** to generate

5. You will see a report like this. Use it to go to the client records and mark complete or discontinue draft assessments, as appropriate.

**Report**

IncompleteAssessmentsReport429-09-2020+12+154PM.pdf

**Incomplete Assessments**  
Training Practice office CDHB

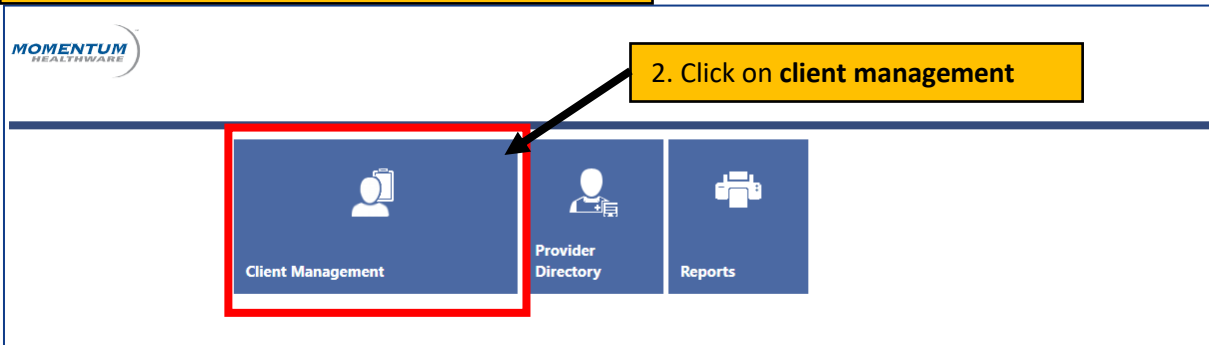
Provider: All      Record Status: Active

NHI	Client	Assessment Reference Date	Reason for Assessment
MDS Assessments ready to be marked complete			

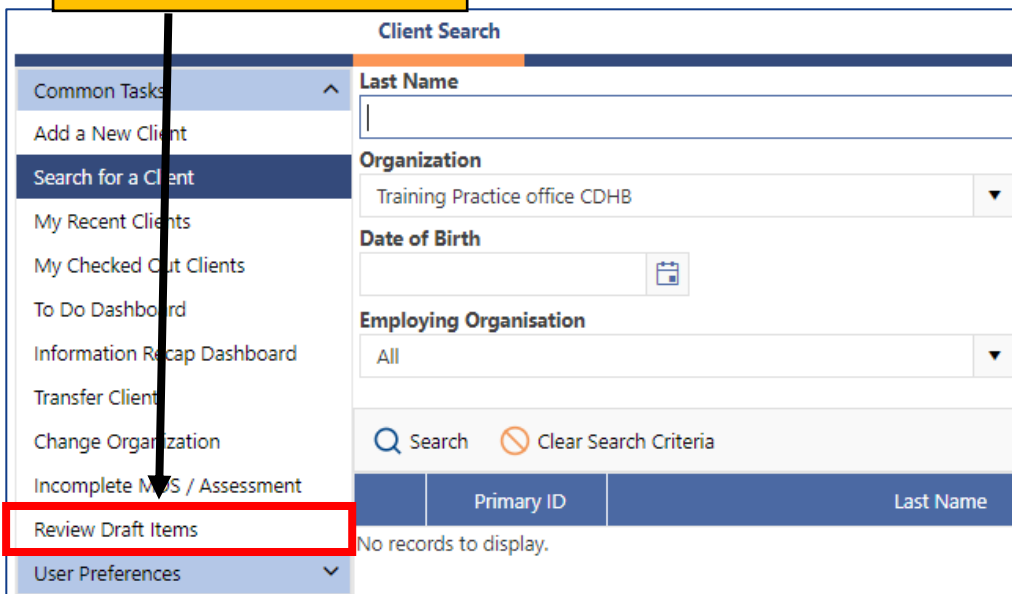
## Task three: review your draft items

These steps show you how to find your draft items, so you can review them and either complete or discard them as appropriate.

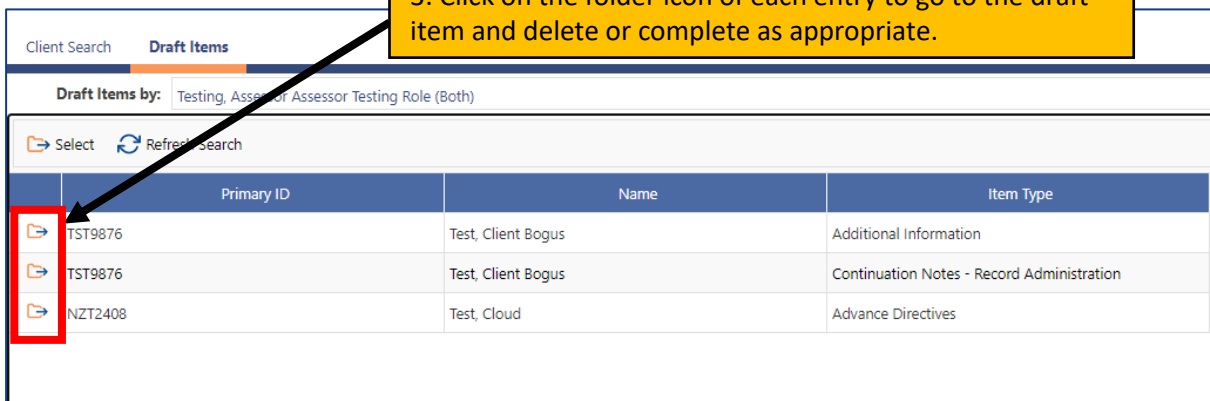
1. Log into Momentum and go to the **home** page



3. Click on **Review Draft Items**



3. Click on the folder icon of each entry to go to the draft item and delete or complete as appropriate.



Use this review feature to identify all items that you as a user have left in draft.

**Note:** You can only run this review for **your own** draft items.