

How to prepare for the interRAI Upgrade

May 2019

Community

This guide provides step by step instructions for community users of the National interRAI Software System to prepare for the May upgrade 2019.

The May 2019 upgrade is scheduled for:

- 24 May 2019 for the Taranaki host site (Central)
- 31 May 2019 for the Canterbury host side (Northern and Southern)

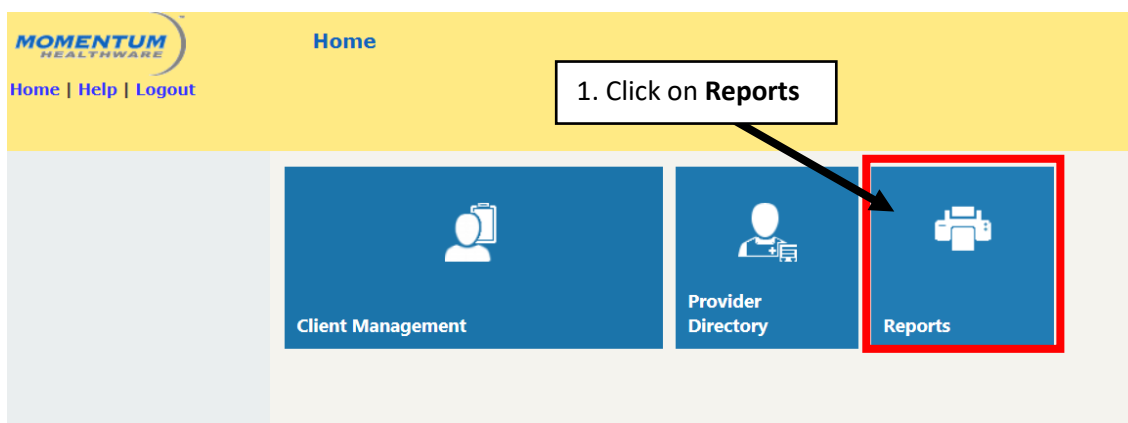
Community users need to ensure that all incomplete assessments are either marked complete or discontinued as appropriate and all records are checked in before your host site is upgraded. For this you should run the Incomplete MDS/Assessments Report and the Checked-Out Client Record report.

All MDS/Assessments left in draft prior to the upgrade may not be able to be completed. All MDS/Assessments checked-out will be forfeit.

Run the Incomplete MDS/Assessments Report

To run the Incomplete MDS/Assessments Report for your DHB office, complete the following steps:

Log into the interRAI software and go to the 'Home' page.



MOMENTUM HEALTHWARE Select Report

Home | Help | Logout

Select Report

Reporting Tasks

Change Working Organization

User Preferences

Report Title	Report Type	Description
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 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.
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.
Incomplete Assessments Report	Integrated Report	Incomplete Assessments Report
Infections Tracking Monthly Summary	Integrated Report	Displays the number of infections for each infection type by month. 12 months.

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

MOMENTUM HEALTHWARE Report Criteria - Incomplete Assessments Report

Home | Help | Logout

Report Criteria

Reporting Tasks

Select Report

Change Working Organization

User Preferences

Last Name: First Name: Record Status: All Provider: All

Organization: Community Training 20 Identifier Value:

View Report PDF

3. Choose the right **Organisation** from the drop down box

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

MOMENTUM HEALTHWARE Incomplete Assessments Report

Home | Help | Logout

Report

Reporting Tasks

Select Report

Prepare Report

Change Working Organization

User Preferences

Incomplete Assessments

Provider: All Record Status: All

NHI	Client	Assessment Reference Date	Reason for Assessment
MDS Assessments with incomplete sections			

Use this report to go to the client records and mark complete or discontinue all draft assessments as appropriate.



Note: You are unable to run the **Incomplete MDS/Assessments Report** by provider at this time.

Run the Checked-Out Client Record report

To run the Checked-Out Client Record report, please complete the following steps; log into the interRAI software and go to the 'Home' page.

MOMENTUM HEALTHWARE Home

Home | Help | Logout

1. Click on **Reports**

Client Management Provider Directory **Reports**

MOMENTUM HEALTHWARE Select Report

Home | Help | Logout

Select Report

Reporting Tasks

Report Title	Report Category	Description
Audit Report by Client	(All)	Integrated Report Audit Report By Client
Audit Report By User		Integrated Report Audit Report By User
Checked Out Client Record		Integrated Report HC Checked Out Client Record
Client Listing by GP		Integrated Report Client Listing by GP
Client Listing Home Care - By ID		Integrated Report Client Listing Report Integration.

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

MOMENTUM HEALTHWARE Report Criteria - Checked Out Client Record

Home | Help | Logout

Report Criteria

Reporting Tasks

Select Report

Change Working Organization

User Preferences

Organization: Community Training 20

Identifier Value

Record Status: All Personnel: All

Sort By: Date Checked Out

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

3. Choose the right **Organisation** from the drop down box

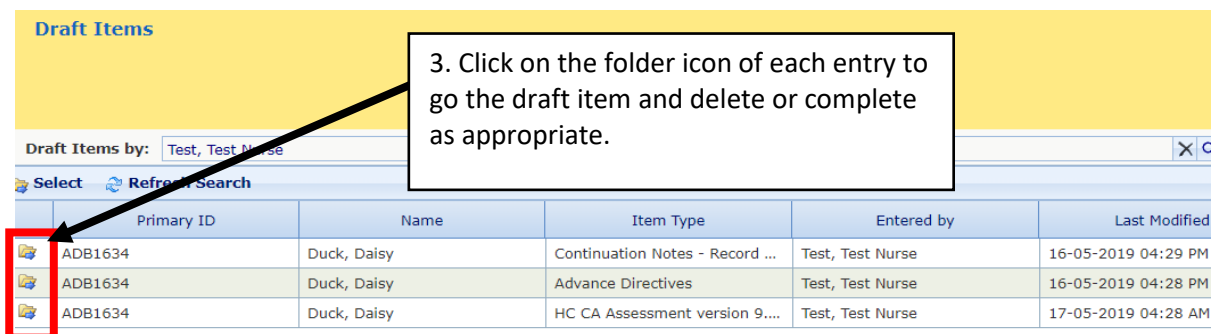
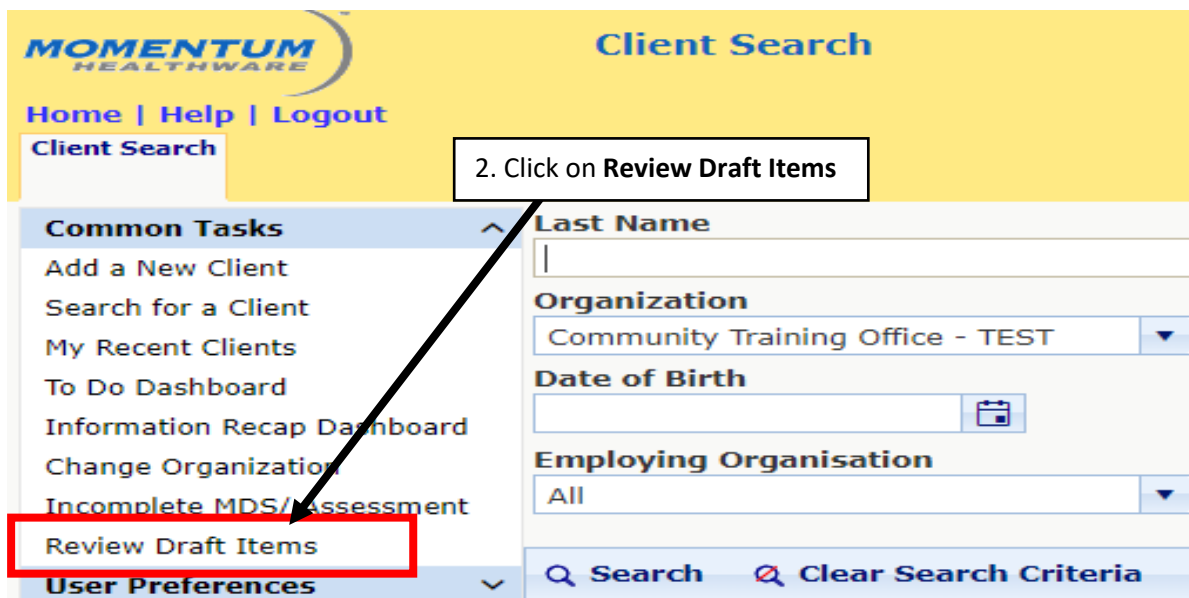
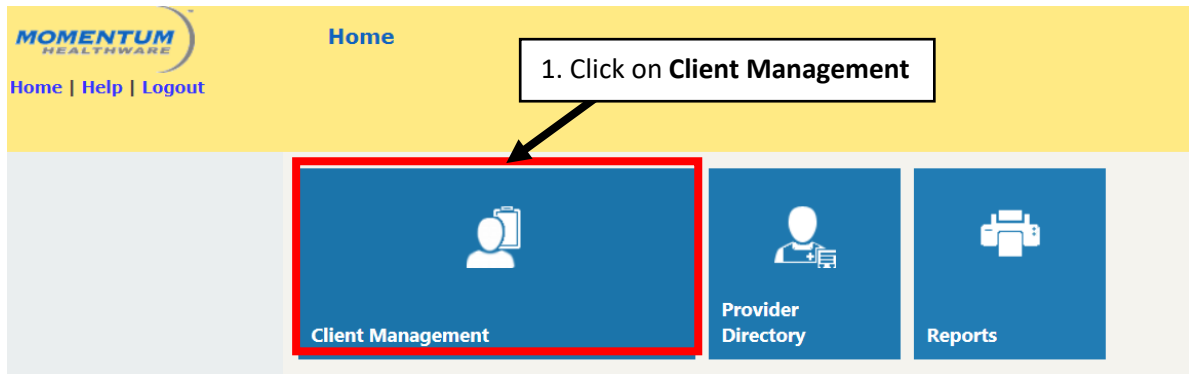
Use this report to identify the assessor/s whom have client records checked out and check them back in as appropriate.



Note: You can unable to run the **Checked-Out Client Record** report by provider at this time.

Your review draft items

To ensure you have left nothing in DRAFT prior to the upgrade, please complete the following steps; log into the interRAI software and go to the 'Home' page.



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.