

What's New

interRAI ACC Contact Assessment Version 10 Upgrade

March 2025 Version 2

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1 Introduction

This document outlines the new and updated features for the upgrade of the interRAI ACC Contact Assessment from version 9.3 to version 10. The upgrade will take effect from 24 March 2025.

Please note: This document is subject to change up to and immediately post the upgrade. If you have saved or printed a copy, please check that you are referring to the most recent version on our website.

Please contact <u>interRAI@tas.health.nz</u> if you require any further information.

New features for this upgrade

New version of the Contact assessment

The Contact assessment is now version 10. There are a number of changes to the assessment items, with some items removed and some new ones added. Please attend a Skills Booster session so that you can be updated on all of the changes.

New look for the ACC Contact assessment

The ACC Contact assessment has a new design. Please see <u>Section 2</u> of this document for navigating this new format. When completing the first assessment after the upgrade, using the new design, there will be no data carried forward from previous assessments.

New mobile app is available for completing assessments offline.

Details of the app and its use can be found in <u>Section 3</u> of this document.

Referral Details must be entered

Details of the referral must be entered on the overview page. These are then pre-populated into items A15a and A15b in the assessment.

To add a referral:

1. Go to Referrals in the left side menu, and then click on Add New Referral

| CIVICA | Client Overview | | | |
|----------------------------|--|--|--|--|
| Client Search Client O | verview Case Activity Forms Care Plan MDS / / | | | |
| Common Tasks | ← ✓ C Return 🔋 Remove Client from Mobile Offline | | | |
| Case Activity | Y Full Name | | | |
| Assessments/Forms | ✓ Test Client | | | |
| Care Plan | Instruction | | | |
| Demographics | Likes to be called | | | |
| History And Physical | | | | |
| Risk Management and Safety | ✓ Service Address | | | |
| MDS / Assessment | ✓ 2 Two Street Two:illo | | | |
| Continuation Notes | V Twotown 2000 | | | |
| Reports | Vew Zealand | | | |
| Referrals | Go to Referrals in the left side menu | | | |
| Referral Summary | Contact z ranny whatao | | | |
| Add New Referral | Click on Add Now Poferral | | | |
| Document Management | | | | |
| Mobile | Comments: | | | |

2. Complete the fields (the ones highlighted red are mandatory), making sure Referral Status is set to 'Active' and then click Save and Return

| 🕞 Return 🖹 Save & Return 🖹 Save 🗠 Cancel | | |
|--|-----------------------|---|
| Referral Source: | Please select an item | |
| Referral Status: | Draft | |
| Referral Date: | 02/12/2024 | |
| Date Referral Received: | i (5 | |
| Referral Accepted: | ● Yes O No | |
| Date Referral Accepted/Rejected: | Ö | |
| Reason for Rejection: | Please select an item | • |
| Continuation Notes: + Add Note | | |

Updated in Version 2

ACC Claim Number

The ACC claim number is no longer a free text field. The software will now only accept valid ACC Claim Number formats with no spaces.

The number is populated into the assessment from the overview page. Any changes to the Claim Number must be made on the overview page.

ACC Client Number

The ACC client number is no longer a free text field. The software will now only accept valid ACC Client Number formats with no spaces. If there is no ACC Client Number in the client information, this field can be left blank. Do not use the ACC Claim Number.

This is populated into the assessment from the overview page. Any changes to the Client Number must be made on the overview page.

Assessment Changes

New items B3b&c

The ACC Contact assessment has two new items around home rental/ownership.

| B3b. Rented Dwelling Ask the person (or if they do not know and there are other adult members of their household) "Do you or anyone else living here rent this home?" | 6 | • | 0 |
|--|----|-----|---|
| Rented dwelling – Rented dwellings may include rooms, houses, flats, apartments, boarding houses and informal dwellings such as caravans, sheds or garages. (1) | | | |
| O Dwelling owned, or partly owned, or held in a family trust – The assessed individual does not need to be the owner of the dwelling, but one member of the household must be an owner of the dwelling. (2) | | | |
| O Unable to determine – The person declines to provide an answer, does not know, or other sources of information do not clarify. (8) | | | |
| B3c. Sector of Landlord [Note: Only code this item if question, Rented Dwelling, was coded as '1'] Ask the person, "Who owns this rental property?" | • | • 🗗 | |
| Private person, trust or business – Any individual, a trust such as the Masonics or Abbeyfield, iwi, a community housing provider or a not-for-profit or for-profit company. Where a person O says a property manager such as a real estate agent or a letting agency or property company such as Quinovic, this code should be used. This should also include homes owned by an employer of one of the residents. (1) | | | |
| O Local authority or city council – Often known as council or pensioner housing. Note some councils have put the management of their council housing with a community housing provide trust. If this is the case and the respondent is aware of management by a trust, use code 1 ('private person, trust or business'). (2) | or | | |
| O Housing New Zealand – A dwelling provided by the state housing provider. This will typically be referred to as Housing New Zealand but some people might refer to the landlord as Hous New Zealand Corporation or Housing Corporation of New Zealand or simply as a 'state house'. (3) | ng | | |
| O Unable to determine – Use this code if the person cannot answer or declines to provide an answer or no one else in the household is willing or able to specify the landlord. (8) | | | |

For information on these items and how to code them, please refer to your interRAI Workbook Units in interRAI Learning and Development (iL&D) found <u>here.</u>

Item C9 is now hidden as it is always coded as 'Yes' and cannot be changed

C9 Home Care or Community Support Services May Be Required for the Person is now hidden in the assessment as it must always be answered 'Yes'. Sections D and E of the assessment must be completed to ensure a case mix is calculated for every assessment.

New automatic coding rule for D18

When D18a1 is coded as 'No Informal Helper' all items in D18 will automatically be coded as 'No informal helper', and D19a&b will be coded as 'No'. This item is not able to be modified until D18a1 coding is changed.

When D18a2 is coded as 'No informal helper', D18b2 will automatically be coded as 'No informal helper' and is not able to be modified until D18a2 coding is changed.

Updated in Version 2

A5b ACC Claim Number is populated from the overview

The ACC claim number is no longer a free text field. This is now pre-populated into the assessment from the overview page. Any changes to the Claim Number must be made on the overview page.

The software will now only accept valid ACC Claim Number formats with no spaces.

A5c ACC Client Number is populated from the overview

The ACC client number is no longer a free text field. This is now pre-populated into the assessment from the overview page. Any changes to the Client Number must be made on the overview page.

The software will now only accept valid ACC Client Number formats with no spaces. If there is no ACC Client Number in the client information, this field can be left blank. Do not use the ACC Claim Number.

2 Single Page Application (SPA) assessments

This section applies to the new design for the ACC Contact Assessment.

Assessment Controls

There are the 5 action buttons at the top of the assessment, and section navigation keys on the left-hand side to navigate through sections.

The action button functions are:

- Save saves the assessment as draft.
- Complete marks the assessment complete.
- Outputs opens an Outcomes and CAPs window on the right-hand side of the assessment window. These outputs update in real time as the assessment is completed.
- Check Errors checks the entire assessment for errors. The view of the assessment changes to show only those items that need correcting.
- Clear Errors clears the red arrow cross from errors that have been corrected and returns the assessment to the standard view showing all assessment items.

| Navigation | Save | Complete | Check Errors | Clear Errors | Outputs | ━ | Action buttons |
|-------------------------------|---|---|---|--|--|--|--|
| Assessment Date and Consent | interRAI™ A(| CC Contact A | ssessment v10 | 0 (New Zealand | 1 v1) | | |
| A. Demographic Information | | ee condern | 33533116112 110 | o (non Louisin | | | |
| B. Intake and Initial History | Accorement n | avigation pior | t | | | | |
| C. Preliminary Screener | Assessmentin | laviyation plai | id Reys hd Ass | essment information | used for research | | |
| D. Clinical Evaluation | Assessment Refere | ence Date 28/ | 01/2025 | | | | E 0 0 |
| | | | | | | | |
| E. Summary | Are you happy for removed | your assessment in | formation to be used | for planning and rese | arch? Your name and a | ddress and any of | ther identifying information will be |
| E. Summary Outcomes | Are you happy for removed (Client or person | your assessment in | formation to be used on behalf of client agr | for planning and rese | arch? Your name and a | ddress and any of | ther identifying information will be |
| E. Summary Outcomes | Are you happy for removed © Client or person Client disagrees | your assessment in n entitled to consent s or client is not com | formation to be used on behalf of client agr petent to make inform | for planning and rese ees ed choice or person en | arch? Your name and a titled to consent on beha | ddress and any of | ther identifying information will be |
| E. Summary Outcomes | Are you happy for removed Client or person Client disagrees interRAI ^{TV} ACC Contact | your assessment in n entitled to consent is or client is not com ct Assessment (CA) Fo | formation to be used on behalf of client agr petent to make inform m version 10.0 © interRAI | for planning and rese ees ed choice or person en 2022 | arch? Your name and a | ddress and any of | ther identifying information will be 《 |
| E. Summary Outcomes | Are you happy for removed © Clent or person Clent disagrees interRAT ^w ACC Contact Status | your assessment in n entitled to consent is or client is not com ict Assessment (CA) Fo Draft | formation to be used on behalf of client agr petent to make inform m version 10.0 © interRA | for planning and rese ees ed choice or person en 2022 | arch? Your name and a titled to consent on beha Last Modified By | ddress and any of alf of client disagre Colliss, Alex Sy | ther identifying information will be (|

The navigation key is orange when the section is in draft, and changes to green when the section is marked complete.



When a new assessment is opened, only the Assessment Date and Consent section of the assessment will be displayed in the assessment and navigation areas. Once the Assessment Reference Date and planning and research consent items have been coded, the rest of the sections will appear. It may take a moment to load the assessment, do not double click.



The assessment opens on one page that users can scroll through or use the navigation keys to move between sections.

Section headers 'stick' at the top of the section being completed. On the right-hand side of the section header, for a section in draft, are the Mark Complete, Check Errors and Clear Errors action buttons for that section. When a section is complete, the section Reopen button appears here instead. The name of the person and the date the section was completed also appears.

| Section B. Intak | and Initial History | | | Check Errors | Mark Complete |
|---|---|---|-------------------------------|------------------|---------------|
| Section C. Cogni | tion | | | Section controls | Reopen |
| Completed By | Colliss, Alex Assessor | Testing On 2024/04/16 | essor information on se | ction completion | |
| C1. Cognitive Skills for Making decisions regard O Independent—Dec | Daily Decision Making ing tasks of daily life - e.g., when isions consistent, reasonable, and | to get up or have meals, which clothes safe (0) | o wear or activities to do | | 900 |
| | lence—Some difficulty in new site | uations only (1) | | | |
| Modified independ | | | terrendelen engennen at the | se times (2) | |
| Modified independ Minimally impaired | I—In specific recurring situations | , decisions become poor or unsate; cue | /supervision necessary at the | | |
| Modified independ Minimally impaired Moderately impair | I—In specific recurring situations ed—Decisions consistently poor o | , decisions become poor or unsate; cue or unsafe; cues / supervision required a | all times (3) | | |
| Modified independ Minimally impaired Moderately impaired Severely impaired No discernable cor | I—In specific recurring situations, ed—Decisions consistently poor of -Never or rarely makes decisions isciousness, coma [Skip to Section] | decisions become poor or unsate; cue or unsafe; cues / supervision required a (4) ion G] (5) | all times (3) | | |

Check Errors opens a pop-up window with the section errors and warnings listed. There is a scrollbar if there is a number of errors/warnings to review. Clicking on OK closes the pop-up.

| Section | Errors and Wa | arnings and warnings have | occurred | | |
|-----------------|-----------------|--|--------------------------------------|----------|---------------------------------------|
| A7. Eliai | Errors/Warnings | Description | | | Use scrollbar when there is a long li |
| A7a New | Error: | A7a. New Zealan | d resident / citizen This field is r | equired. | of errors/warnings to review |
| | Error: | A7d. UK or Austr required. | alian citizen visiting NZ This field | d is | |
| | Error: | A7e. ACC accept | ed claims This field is required. | | |
| | Error: | A10a. (255 chara | cters max) This field is required. | | Error/Warning and information on wh |
| This field is a | Error: | A10b. Primary G | oal This field is required. | | coding does not pass assessment |
| A7b. Wor | Error: | A12. Residential field is required. | /Living status at time of assessm | ent This | validation check |
| | Error | A12a Liver Thin | field is required | | |
| | | | | | Use OK to close the window when |

Items in the section that do not have any warnings or errors are hidden. Only items which still require coding, or don't meet validation are visible. There is a yellow message bar at the top of the assessment which displays when the section is in 'Check Errors' mode. Click on 'Clear Errors' to display all items in the section.

| | | | ors wode |
|--|---|---------------------------------|------------|
| Section H. Continence | Click 'Clear Errors' to dis items in the section | Check Errors M Clear Errors | ark Comple |
| H2. Urinary Collection Device (Exclude pac | ls / briefs] | | 8 2 |
| | None (0) | | |
| | Urodome (1) | Only items that don't meet the | |
| | Indwelling catheter (2) | validation checks (indicated by | |
| | Cystostomy, nephrostomy, ureterostomy (3 | in 'Check Errors' mode | |
| This field is required. | | | |
| H4. Pads or Briefs worn | | | 00 |
| | No(0) | | |
| | | | |

Section Help is now available at an item level. Each item has an information icon, which opens a pop-up window with the information needed.

| C1. Cognitive Skills for Daily Decision N Making decisions regarding tasks of daily | laking life - e.g., when to get up or have meals, which clothes to wear or activities to do | elp icon 🗪 🖲 🖓 🥥 |
|--|---|------------------|
| O Independent—Decisions consistent, | reasonable, and safe (0) | |
| O Modified independence—Some diff | iculty in new situations only (1) | |
| O Minimally impaired—In specific recu | rring situations, decisions become poor or unsafe; cues/supervision necessary at those times (2) | |
| Moderately impaired—Deci Severely impaired—Never o | Section B. Intake and Initial History | Check |
| No discernable consciousne | C1. Cognitive Skills for Daily Decision Making | |
| | Intent | |
| Item help pop-up window | To record the person's actual performance in making everyday decisions about the tasks of daily living. These items are especially important for further assessment and care planning in that they can alert the assessor to a mismatch between a person's abilities and his or her current level of performance, as the family may be inadvertently fostering the person's dependence. | |
| | Definition | those times (|
| | Here are some examples of decision-making tasks: | |
| | Chaosing items of slathings | |
| | ок | |
| | antian C. Functional Chatric | Check |

Comments are added to items by clicking on the page icon. This brings up a text field below the item which the comment can be typed into. Comments are now visible alongside the coding they support.

| C1. Cognitive Skills for Daily Decision Making Making decisions regarding tasks of daily life - e.g., when to get up or ha | Comment icon is white when no comments are entered. Clicking on the icon makes the comment field visible. | - | | | | | | |
|---|---|----------|--|--|--|--|--|--|
| Independent—Decisions consistent, reasonable, and safe (0) | | | | | | | | |
| O Modified independence—Some difficulty in new situations only (1) | | | | | | | | |
| O Minimally impaired—In specific recurring situations, decisions become | O Minimally impaired—In specific recurring situations, decisions become poor or unsafe; cues/supervision necessary at those times (2) | | | | | | | |
| O Moderately impaired—Decisions consistently poor or unsafe; cues / s | supervision required at all times (3) | | | | | | | |
| Severely impaired—Never or rarely makes decisions (4) | | | | | | | | |
| No discernable consciousness, coma [Skip to Section G] (5) | | | | | | | | |
| | | | | | | | | |
| C1. Cognitive Skills for Daily Decision Making Making decisions regarding tasks of daily life - e.g., when to get up or have | Comment icon is yellow if there is a comment entered. | | | | | | | |
| O Independent—Decisions consistent, reasonable, and safe (0) | | | | | | | | |
| O Modified independence—Some difficulty in new situations only (1) | | | | | | | | |
| O Minimally impaired—In specific recurring situations, decisions become | ne poor or unsafe; cues/supervision necessary at those times (2) | | | | | | | |
| O Moderately impaired—Decisions consistently poor or unsafe; cues / | supervision required at all times (3) | | | | | | | |
| Severely impaired—Never or rarely makes decisions (4) | | | | | | | | |
| No discernable consciousness, coma [Skip to Section G] (5) | | | | | | | | |
| Comments: | | | | | | | | |
| Add your comments here Comment text field. | | | | | | | | |
| Added By Colliss, Alex Assessor Testing Da | ate 16-04-2024 13:05:10 Comment entry details. | | | | | | | |

Uncoded required items, or items that don't pass validation checks in the assessment are indicated by the red X icon on the right. Red text under the item gives the information about why the item doesn't pass validation. A coded, required item that passes validation is indicated by a green tick on the right.

| A7a. New Zealand resident / citizen | | Required item, not coded or coding does not pass assessment validation check |
|-------------------------------------|--------------------------------------|---|
| | No (0) | |
| | Yes (1) | |
| | Unknown (First Assessment only) (11) | |
| This field is required. | | Demuined item coded and eccess . |
| A7b. Work Visa | | assessment validation check |
| | No (0) | |
| | Ves (1) | |
| | (5) (1) | |

Printing an Assessment

The assessment is now printed from the MDS/Assessment list, or from within the assessment itself.

Note: Assessment comments are still printed from the left side menu by selecting 'Print MDS/Assessment Comments'

Printing from the MDS/Assessment List

- 1. Highlight the assessment in the list that you want to print
- 2. Click on the 'Print' button located in the command ribbon above

| Next N | IDS / Assessment | | | | | |
|--------|------------------|---------------------------------|------------------------|---|-------------------|----------------------------------|
| + Ne | w 💿 Discontinu | e 2b Error Out 🔋 Delete 🔒 Print | | | lick in the print | button |
| | Reference Date | | MDS / Assessment | | Status | Last Modified Date |
| | | | | • | | |
| Ð | 28/01/2025 | interRAI™ ACC-CA | v10.0 (New Zealand v1) | | Draft | 28/01/2025 03:17 PM |
| C+ | 03/12/2024 | interRAI™ ACC-CA | v10.0 (New Zealand v1) | | Draft | 06/12/2024 02:13 PM |
| D | 08/11/2024 | interRAI™ ACC-CA | v10.0 (New Zealand v1) | | Highlight | the assessment you want to print |
| C | 08/11/2024 | interRAI™ ACC-CA | v10.0 (New Zealand v1) | | Disconanded | |
| C> | 02/11/2024 | interRAI™ ACC-CA | v10.0 (New Zealand v1) | | Complete | 15/11/2024 09:50 AM |

Printing in the assessment form

- 1. Open the assessment
- 2. Click on the 'Print' button at the top of the form



1. Mobile app (for offline use)

The mobile app is available to use with the new SPA assessments, including the ACC Contact Assessment.

1.1 Installing the Mobile app

- **1.1.1** Make sure your device is connected to the Internet.
- **1.1.2** Open the interRAI Assessment Software and log in. If you have access to more than one organisation, choose a working organisation.
- **1.1.3** Click on the Civica Momentum Mobile App tile.

| CIVICA | Home | |
|--------|-------------------|-----------------|
| | | Civica Momentum |
| | Client Management | Mobile App |

1.1.4 Google Chrome

1.1.4.1 A new tab will open with the app. If this is the first time opening it, you will have the option to install the app in the top right corner of the screen. Click on Install App and then click Install in the pop-up window that appears.

| Login | | 1. Click on Install App |
|-------------------|--------------|---|
| CIVIC Momentum | Install app? | × 2. Click Install in the pop-up window |
| Password | | |
| | LOGIN | |

1.1.4.2 You can now close the browser window with the Mobile app log in page. The app should open separately from your browser. We recommend pinning the app to your task-bar so it is easy to locate.

1.1.5 Microsoft Edge

1.1.5.1 A new tab will open with the app. If this is the first time opening it, you will have the option to install the app in the top right corner of the screen. Click on Install App and then click Install in the pop-up window that appears.

| Login | 1. Click on Install App |
|----------|--|
| Momentun | Install Momentum Mobile app |
| * | Publisher: civicauatmobile.interrai.health.nz Use this site often? Install the app which: • Opens in a focused window • Has quick access options like pin to taskbar • Syncs across multiple devices |
| User ID | Install 42. Click Install in the pop-up window |
| Password | |
| | LOGIN |

1.1.5.2 Choose the preferred options for adding the app as shortcuts and to your task-bar and click Allow

| Momentum Mobile - Civica | a | - 0 X |
|--------------------------|--|---|
| Login | App installed | Online |
| CIVICA | Momentum Mobile has been installed as an app on your device and will safely run in its own window. Launch it from the Start menu, Windows taskbar or your Desktop. | |
| | Allow this app to Image: Allow this app to Image: Plin to taskbar Image: Plin to Start Image: Create Desktop shortcut Image: Auto-start on device login | Chose your preferred options for the taskbar and shortcuts and click Allow |
| User ID | Allow Don't allow | |
| Password | | |
| | N | |

- **1.1.6** Once the app has been installed, enter your UserID and password and click Login. The first time you open the app may take some time to synchronise.
- **1.1.7** The first time you log in to the app, you will be asked to register for local data synchronization. Click 'Register' in the pop-up window and check 'Don't show again'.



1.1.8 Once successfully logged in and synchronised, the app will open and the 'Select Organisation' page will be displayed if you have access to multiple organisations. If you only have access to a single organisation, then the 'Select Client' page will be displayed.

1.2 Adding and removing client files for offline use

- **1.2.1** Make sure your device is connected to the internet.
- **1.2.2** Log in to the web-based version of the interRAI Assessment Software at <u>Production</u> (interrai.health.nz).

First Method

- **1.2.3** Search for the client and go to their overview page.
- **1.2.4** To add the person for use offline, click on Add Client to Mobile Offline.

| CIVICA | Client Overview |
|--|---|
| Client Search Client Overview | Case Activity Forms Care Plan MDS Continuation Note |
| Common Tasks ^ | Return + Add Client to Mobile Offline Click on Add Client to Mobile Offline |
| Enter a New Continuation Note Add a New Client Search for a Client | Testing, Alex A e Likes to be called |

1.2.5 On the right side of the overview page will now be displayed the name of the user with the record marked for Mobile Offline use.

| Gender | Marked for Mobile Offline by |
|------------------|---|
| emale | Colliss, Alex (Last Sync: 08/04/2024 16:48) |
| Primary Language | Identifiers |



| CIVICA | Client Overview |
|--|--|
| Client Search Client Overview | V Case Activity Forms Care Plan MDS Continuation Note |
| Common Tasks ^ * | Return Remove Client from Mobile Offline Click on Remove Client from Mobile Offline Full Name Full Name Click on Remove Client from Mobile Offline |
| Enter a New Continuation Note Add a New Client Search for a Client | Testing, Alex A e Likes to be called |

Second Method

1.2.7 On the left-side menu, click on Mobile and then My Mobile Offline Clients.

| CIVICA | Client Search |
|----------------------------|---------------------------------------|
| Client Search | Last Name |
| Mobile | 1. Click on Mobile |
| Mobile App Installations | Organization |
| My Mobile Offline Clients | 2. Click on My Mobile Offline Clients |
| All Mobile Offline Clients | Date of Birth |

1.2.8 Enter the person's NHI (or other search criteria) into the appropriate fields and click Search. A list of clients matching the criteria will be displayed.

| CIVICA Client Search My M | obile Offli | My Mobile Offline Clients | | | | |
|--------------------------------|-------------|---------------------------|--------------------|---|------------------------------|-----------------------|
| Common Tasks Message Centre | * * | Last Name | 1. E | nter the person's NHI number under Primary ID | | Primary ID 8881234 |
| Mobile | ^ | Provider | | Organization ID | | Record Status |
| Mobile App Installations | | All | I Q | ZZ_ Training Practice office HC | | Active |
| My Mobile Offline Clients | e 1 | | 6 | | | |
| All Mobile Offline Clients | | Q Search | 2. Click on Search | | | |
| User Preferences | ~ | Las | st Name | First Name | Primary (D | Record Status |
| | | Community Case | Study | 3. List of files r criteria w | natching seaı vill appear | rch z |

1.2.9 Add a check mark to the client/s for offline use and click on Update Mobile Offline Client List.

| CIVICA | | My Mob | ile Offline Clients | | | | | |
|----------------------------|----------|-------------|-----------------------------------|------------------|-------------------------|--------------|----------|-----------------------|
| Client Search My Mol | ile Offl | ine Clients | | | - | | | 108780 1 087 |
| Common Tasks | ~ | Last Name | | First | Jame | | | Primary ID BBB1234 |
| Mobile | ^ | Provider | | | | 1 6611 | 1 | Record State |
| Mobile App Installations | | All | 4. Click to add a check | mark next to the | e client files to be us | sed offline | | Active |
| My Mobile Offline Clients | | | | | | | - | 1 |
| All Mobile Offline Clients | | Q Ser | Update Mobile Offline Client List | 5. | . Click on Update N | Iobile Offli | ne Clien | t List |
| User Preferences | ~ | | Last Name | | First Name | Pri | mary ID | Record Stat |
| | 1 | 🍼 Co | ommunity Case | Study | | BBB1234 | | Active |

1.2.10 To remove the client from the list, search for them again under My Mobile Offline Clients, remove the check mark, and click on Update Mobile Offline Client List.

1.3 Checking clients marked for offline use

- **1.3.1** Go to All Mobile Offline Clients
- **1.3.2** Search for your name using the magnifying glass icon beside the Marked for Mobile Offline by field and click on search. A list of the clients/residents that you have marked will appear here.

| CIVICA | e Offlir | All Mobile Offline Clie | ents | | | | | | £1010 |
|---|----------|--|-------------|----------|----------------------------|-----------------------|-------------------------------|-------------|-----------|
| Common Tasks Mobile Mobile App Installations My Mobile Offline Clients | * * | Lost Name Marked for Mobile Offline L Colliss, Alex Assessor Testing | y | a | First Name | arch for yourself by | Primary ID Y USING ICON | | • |
| All Mobile Offline Clients User Preferences | ~ | Q Search | 2. Click on | Search | | | | | |
| | | Last Name | First Name | Tes | t Organization Name | Marked for Offline by | Userild | Device Info | Last Sync |
| | | Community | Case Study | ZZZ0066 | NZ HC Testing Facility 202 | 4 Colliss, Alex | | | |
| | | C Testing | Alex A | ACA2023 | NZ HC Testing Facility 202 | 4 Colliss, Alex | | | |
| | | C=> Testing | Alex Tablet | AC82024 | NZ HC Testing Facility 202 | 4 Colliss, Alex | | | |

1.3.3 You can use the file icon to the left of the person's name to go to their file and make changes.

1.4 Synchronisation between the Mobile app and web-based application

- **1.4.1** While using the Mobile app connected to the internet, the client record and assessments are continuously synchronised.
- **1.4.2** After adding clients to use offline, log into the app before disconnecting from the internet. This transfers your client/resident information into the app.
- **1.4.3** When you are not connected, you can continue to work or create client assessments. Your work will be automatically saved on your local device's storage.
- **1.4.4** Re-connecting to the internet and logging into the Mobile app automatically updates the client/resident records you marked for synchronisation in the web-based application.
 - 1.4.4.1 After reconnecting to the internet, and before making any changes to your assessment in the web-based version, log in to the app again. This transfers the client/resident information entered offline back into the web-based version.
 - 1.4.4.2 After this, we recommend removing all the clients from your list of clients/residents marked for offline use.

1.5 Navigating the app

1.5.1 Selecting an organisation

- 1.5.1.1 Only those organisations that you have permission to access are displayed
- 1.5.1.2 Select the organisation you want to work with.

| Momentum Mol | oile - Civica | Θa | 13 | ä | × |
|--------------|---------------------------------------|----|----|---------|------------------|
| Select O | rganisation | | | Offline | = |
| Q ZZ_ | Τ | | | | × |
| | ZZ_ Training Practice office HC Z | | | | |
| | ZZ_ Training Practice office LTC Z | | | | - 1111 - 1111 |
| | | | | | |

1.5.2 Selecting a client record

1.5.2.1 All client records in an organisation are visible when the Mobile app is online. You can search for the person by name. Those clients/residents who have been synchronised for offline use with have an arrow icon next to their name.

| | Momentum Mobile - Civica | P | ଶ | | | × |
|---|--------------------------|---|---|------|-------------|---|
| | ← Select Client | | | O | Online | = |
| | Q Search | | | | | |
| File can only be accessed online while using the app | Brown, John XYZ1002 | | | Ma | ile, Age 8! | 5 |
| Arrows indicate the file can be accessed offline while using the app | ABC1234 | | | Fema | ile, Age 7(| 2 |
| | | | | | | |

1.5.2.2 When you access the *Select Clients* page in mobile offline, only those client records you have marked for synchronisation are displayed. See section 4.2 for instructions on marking clients for synchronisation.

1.5.2.3 Click once to open the client record you want to work with. The record will open to an overview page. The information in the overview page is display only, and is not able to be edited in the app. All changes to this information need to be made in the web-based application.

| ← Client Overview Offline | | | | | | | | | | |
|-----------------------------------|---------------------------------|------------------|---|--|--|--|---|--|--|--|
| Male Age: 61 | | | | | | | | | | |
| Organisation Name | ZZ_ Training Practice office HC | Status | Active | | | | | | | |
| Full Name | Colliss, Test Client 2 | NHI | ACB2023 | | | | | | | |
| Likes To Be Called Marital Status | | | | | | | | | | |
| Date of Birth | 1962-07-04 | Primary Language | | | | | | | | |
| Age | 61 | Phone Number | | | | | | | | |
| Gender | Male | Service Address | 123 One Street Oneville Onetown 1111 New Zealand 1231 | | | | • | | | |

1.5.3 Finding an existing assessment

1.5.3.1 On the client overview page, click on the three lines in the top.

| Momentu | um Mobile - Civica | | o x |
|---------|--------------------|---|-----|
| ÷ | Client Overview | Click on the three lines in the top right-hand corner of the app window | = |
| | Colliss, 1 | Test Chent 2 | |
| | AC | B2023 | |
| Male | | | |
| Age: 61 | | | |

1.5.3.2 Click on 'Forms and Assessments'

| Momentum Mobile - Civica | | | | Ga | Ĩ | | | × | | | | | |
|--------------------------|-------------------------------|----------------------------------|-------|----------|--------|-----------------------|---------------|---|--|--|--|--|--|
| ← Client Overv | view | | | _ | | C | offline | = | | | | | |
| | Collis | s, Test Client 2 | | Change (| Organi | sation | | | | | | | |
| | | ACB2023 | | | | | Change Client | | | | | | |
| Male | Click on 'Forms | Click on 'Forms and Assessments' | | | | Forms and Assessments | | | | | | | |
| Age: 61 | | | | Logout | | | | | | | | | |
| Organisation Name ZZ | _ Training Practice office HC | Status | Activ | /e | | | | 1 | | | | | |

1.5.3.3 Any completed or draft assessments or forms will be displayed in a list



1.5.3.4 Click once on the required assessment to open it. The assessment is displayed in the same format as the web-based assessments and can be navigated in the same way. See <u>Section 3</u> of this document.

1.5.4 Add a new assessment or form.

1.5.4.1 One the client overview page, click on the three lines in the top right-hand corner of the app window.



1.5.4.2 Click on 'Forms and Assessments'.

| Momentum Mobile – Civica | | | | Cu | I | - | | × |
|--------------------------------|--------------------|-----------------------|-------|----------|--------|--------|---------|---|
| ← Client Overview | | | | _ | | 0 | offline | = |
| | Colliss, | Test Client | 2 | Change (| Organi | sation | | |
| | | Change Client | | | | | | |
| Male | Click on 'Forms a | Forms and Assessments | | | | | | |
| Age: 61 | | | | Logout | | | | |
| Organisation Name ZZ_ Training | Practice office HC | Status | Activ | 'e | | | | |

1.5.4.3 Click on the blue circle with the plus sign.



1.5.4.4 Select the required assessment or form from the list

| | ile - Civica | œ | : | | |
|-----------|--|---|---|--|---|
| Select fo | rm type to create | | | | 8 |
| ď | interRAI™ CA v10.0 (New Zealand v1) interRAI™ Contact Assessment v10.0 (New Zealand v1) | | | | |
| ď | interRAI™ HC v9.3 (New Zealand v1) interRAI™ Home Care v9.3 (New Zealand v1) | | | | |
| ď | interRAI™ PC v9.3 (New Zealand v4) interRAI™ Palliative Care v9.3 (New Zealand v4) | | | | |

1.5.4.5 The assessment is displayed in the same format as the web-based assessments and can be navigated in the same way. See <u>Section 3</u> of this document.

2. Known Issues

The list below are issues that are present at the time of the upgrade. We are continuing to work with our software vendor to have these corrected as soon as possible. Where needed, we will have a documented workaround for you.

| Issue | | | | | | | | Status |
|--|--|---|--|--|---|--|--|-------------------|
| There are some minor in item help sections) updates. | cosme that we | tic is are | sue awa | es (f are d | or ex of an | kan Id v | nple spelling and grammar vill be resolved in coming | Fixes in progress |
| The community care p breaks in the current of | | | | | | | | |
| The line breaks enterest situation, and in the ca | Fix in progress | | | | | | | |
| Domicile code, langua overview into the asse few users. Please ema issue. | Fix in progress | | | | | | | |
| Return button in Disea a new draft assessme SPA assessment. | ases and nt wher | d Dia h the | agno se s | oses scre | s and ens | d C are | ontinuation notes creates accessed from within a | |
| When in Diseases and the assessment by clic then choose the draft | d Diagno cking or assessr | oses n MD ment | or f S/A | the sse m th | Cont essm ne lis | tinu ieni st. | uation notes, go back to t in the banner menu, and | Fix in progress |
| Some users are not a manually entering the because if a user typ 0024, not 2024. The u the software leaves in entering the ARD and click only once and to populate. | ble to p e Asses es '24' user can t in draf i instea o give th | orop ssme as th n stil ft. W d us ne so | erly ent l ne y ll m /e re e th oftw | r co Ref ear ark eco ne d /are | mple eren , the the ate j e a fe | ete ce so ass enc oic ew | their assessments when Date (ARD). This is ftware registers this as sessment complete but I users avoid manually ker, remembering to seconds for the date to | |
| Assessment Reference Date | 09/09/2024 | | | | | | Ê 0 | Fix in progress |
| Are you happy for your assessmer September 2024 < Today > arch? Your name and address and any other identifying information | | | | | | | | |
| Client or person entitled to co | SU MO | TU | WE | TH | FR | SA | | |
| Client disagrees or client is no disagrees | 8 6 | 3 | 4 | 5 | 13 | 7 | titled to consent on behalf of client | |
| interRAI™ Long-Term Care Facilities (L | 15 16 | 17 | 18 | 19 | 20 | 21 | | |
| | 22 23 | 24 | 25 | 26 | 27 | 28 | | |
| Status Draft | 29 30 | 1 | 2 | 3 | 4 | 5 | Mawhinney, Shelley interRAI System | |
| Completed By | 6 7 | 8 | 9 | 10 | 11 | 12 | 09/09/2024 11:19 AM | |
| L | | - | - | _ | _ | - | | |