Client CARD Testing Checklist (6.2021.1 Upgrade)

The following is a list of content clients are required to check, verify, and agree upon after a Test upgrade has been completed and before a Production upgrade can be scheduled. We ask that the **Client Team Lead** reviews, initials, and signs this checklist. We recommend that at least two (2) staff members review each item to ensure no issues are missed.

Document testing results using the form provided below.

- If you are able to perform the task listed, mark the task as “Passed.”
- If you are unable to perform the task or received an error, mark the “Failed” column and use the Comments box provide as many details as possible including ‘steps taken’ prior to the error. Attach screenshots if at all possible.
- Note any issues, missing functionality, or error messages in the Comments boxes or the additional Notes/Comments fields available at the end of each table.
- Leave the Passed/Failed columns blank and note “Not Applicable” in the Comments box if not applicable to your practice.
- Every task below must be initialed by the staff member completing the checklist.
- Additional pages may be attached to the end of the checklist if needed.

Once complete, submit the Client Testing Checklist to helpdesk@tsihealthcare.com or 919-442-0042. Please allow a minimum of five business days for a member of our Upgrade Team to contact your staff to review the results and address any issues. Feel free to contact us if you have questions.

Practice Name	
Client EPM Team Lead	
Client EHR Team Lead	

EPM TESTING				
Chart	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Chart lookup for existing patient				
Chart maneuvering				
Print data sheet (if used)				
Print fee ticket				
Charge entry – add charges				
Payment entry & post batch				
Add new patient & create chart				
Print demand statements				
Appointments	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Appointment lookup				
Open existing appointment				
Reschedule appointment				
Cancel appointment				
Make new appointment				
Check in appointment				
Check out appointment				

Reports	Passed Testing	Failed Testing	Comments	Client Initials
Daily charge report				
Daily payment report				
Letters	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Print Demand Encounter letters (if used)				
Print Demand Account letters (if used)				
Processes	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Run EDI Encounter build & claim edits *(DO NOT send claims)*				
Run Statements build *(DO NOT send statements)*				

REPORT SERVER TESTING

(NOTE: Report Server Testing is only needed for clients on their own servers. If you are hosted on TSI's ASP, mark "N/A" and proceed to EHR Testing.)

Description	Initials
Can logon to Report Server and access all reports that are commonly used	
Daily reports generating successfully	
Weekly reports generating successfully	
Monthly reports generating successfully	
Can print reports from report server	

EHR TESTING (*IMPORTANT NOTE: Testing should be completed in TEST or DEVL using existing patients. It is recommended that users duplicate real encounter information while testing to ensure testing workflows accurately represent production end user workflows.)*				
Top Icon Toolbar & Patient Information Bar	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Confirm SOGI information displays correctly when hover over patient gender				
Confirm all patient information displays accurately on Patient Information Bar				
Confirm number indicators on patient badges are correct and hover function shows accurate data				
Confirm patient's Future and Past Appointments displays correctly *NOTE: Number of future and past appointments displayed will vary based on practice's configurations*				
Alerts	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Verify that if patient has alerts present that the badge turns red				
Verify able to add/update alerts				
Verify that the hover feature on the alerts button is working and all alerts display correctly				

Patient History Toolbar	Passed Testing	Failed Testing	Comments	Client Initials
Verify the new refresh button on Patient History Toolbar refreshes data on the Patient History tab				
Verify the new refresh button on Patient History Toolbar refreshes data on the Categories tab				
Verify the new Search Document Icon launches Document Search window				
On Document Search window, enter keyword or phrase to search for documents and open document from search results *NOTE: As not all documents are copied from Prod to Test, opening a document that was not created in Test may result in an error*				
Templates - Historical Data from Existing Encounters	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Verify all templates open without error *NOTE: Opening pre-6.2021.1 customized templates rather than new version may result in an error*				
Verify all previously entered data from old encounters displays as anticipated				
NOTE: Previously generated documents and scanned images will not populate in the TEST environment and if opened, may result in an error.				
Templates - New Data Entered on New Encounters	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**

Can create new encounters				
Confirm ability to add Virtual Visit Types				
Complete at least 5 new encounters from check-in to check-out				
All templates open without error				
All new data displays as designed				
All active text links function				
All pick list values are displaying as anticipated				
All data grids function				
All buttons function				
Can add demographic data and is displaying as anticipated				
Can add medical history and displays accurately				
Can add social history and displays accurately				
Can add family history and displays accurately				
Can add new patient problem				
Can modify existing patient problems				
***CARD Intake -Template Enhancements**	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Confirm can add and delete providers to the “Send Copies to” summary grid				

For practices using Automated Document Sharing only				
Confirm able to copy forward past previous free form HPI's				
Confirm able to create and use My Phrases in free form HPI				
Confirm checking HPI Box under ROS displays properly				
Confirm able to copy forward previous assessments and plans. Verify BMI sorts to bottom of assessments if entered in vital signs.				
***Coumadin – CARD- TSI**	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Confirm letters generate from new button				
***SOAP – CARD - TSI**	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Confirm Labs button launches Orders Module console and able to order lab/rad tests. **Only if selected option during Configuration call*				
Confirm diagnosis group option no longer pops up when launching the DAP template				
Confirm Copy Forward of previous Assessments/Plans and BMI and / or Tobacco Cessation sorts to last diagnosis				
Verify Communication Panel displays - telephone call template history				

Verify One Page PE displays and can save PE defaults				
Confirm copy forward of previous assessments and plans				
Confirm ability to edits assessments and plans				
***CARD Enroll In**	**Passed Testing**	**Failed Testing**	**Comments**	Client Initials
Confirm addition of CCM radio button				
Confirm Location picklist				
*CARD Doctor Visits	**Passed Testing**	**Failed Testing**	**Comments**	Client Initials
Confirm Type populates 'Same Doctor' radio button by default				
Confirm 'Ordered By' defaults to current provider				
Confirm additional 'When' options: • First available, As previously scheduled				
***Procedure Order- CARD - TSI**	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Confirm additional options for the following categories: • Vascular: Venous Reflux; Vein Center • EP: 30-day Event; Device Extr; Holter, ext • Cath Lab: TCAR; EVAR; Mitra Clip				

• EP Lab: ILR; Pocket Revision; Ablation – PVC/VTach				
***Procedure – CARD - TSI**	**Passed Testing**	**Failed Testing**	**Comments**	Client Initials
Confirm additional options for the following categories: • Cath Lab: Watchman; TMVR; TAVR; EVLT; VAD • CV Surg: TAVR; TMVR; VAD				
Confirm any additional cardiac procedure configuration (as noted on cardiology setup form)				
Confirm My Phrase on EP Result Wizard				
Confirm New EKG checkbox checked when provider enters results/interpretation				
Confirm ability to attach scanned documents and images to Cardiac procedures				
***Education – CARD - TSI**	**Passed Testing**	**Failed Testing**	**Comments**	Client Initials
Confirm additional check box for: • ICD Shared Decisions • ICD Post-Op				
***Finalize Template - 2021 E&M coding Guidelines** *(if applicable)*	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**

Verify time populates appropriate E&M visit code				
Verify prolonged service field populates appropriate code and units				
Confirm 'Bill ECG checkbox' is checked when applicable				
***MIPS Dashboard - CARD**	**Passed Testing**	**Failed Testing**	**Comments**	Client Initials
Confirm all tracked measures display and updates properly when applicable				
***Practice Orders Console**	**Passed Testing**	**Failed Testing**	**Comments**	
Confirm orders display properly				
Confirm filter options display orders properly				
Encounters Flagged as Containing Substance Abuse Disorder Information & Disclaimer Statement *(if applicable)*	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Confirm checking "Record contains substance abuse disorder information" checkbox on template displays practice's preferred configuration statement on generated documents *NOTE: Checkbox will only be present if your practice has decided to enable feature on 6.2021.1 Setup Form.*				

Client CARD Testing Checklist (6.2021.1 Upgrade)

Screening Template *(if applicable)*	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Verify able to launch and complete a screening from the Screening template and verify documented information appears on generated visit document				
Sensitive Encounters	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Verify able to mark encounter as sensitive by right clicking encounter and updating Sensitivity Settings *NOTE: User completing task must have appropriate permissions enabled in System Administrator to use this feature.*				
Confirm encounter marked as sensitive displays red exclamation point indicator next to encounter date				
Configurable Vital Sign BMI Alerts *(if applicable)*	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Add height/weight information to generate BMI within range of practice's configured BMI alert and verify alert displays on the Vitals Signs popup template *NOTE: Only applicable if new BMI configurations were requested on practice's 6.2021.1 Setup Form.*				
My Phrases	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**

Able to add, modify and create My Phrase with new functionality.				
Cardiology Scorecard	**Passed Testing**	**Failed Testing**	**Comments**	**Clients Initials**
Confirm view of one-page graphical trend view				
Ability to add, modify each of the following • Framingham Risk • MESA CHD Risk • HAS-BLED • Pooled Cohort ASCVD Risk • CHA_2DS_2-Vasc				
Appropriate Use Criteria (AUC)	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Place advance diagnostic order (MRI, CT, etc.) on the Procedure Order popup and verify the AUC Wizard launches and score is able to be calculated *NOTE: Patient encounter must have Medicare payer attached. Only applicable if practice has proceeded with AUC implementation.*				
***Patient Task History Template**	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Confirm launch of New Demographic template				

Confirm patient associated task history displays properly				
PRAPARE Template *(if applicable)*	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Verify able to launch PRAPARE template and document data				
Generate PRAPARE document and verify data displays accurately				
Documents	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Generate all EHR documents used by practice and verify data displays accurately				
NOTE: Previously generated documents and scanned images will not populate in the TEST environment.				
Images *(if applicable)*	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Open an EHR Image (new image)				
Save an EHR Image to encounter				
Medications	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Add new medication				
Confirm Print Prescription (preview) displays properly				
Confirm Fax Prescription (preview) displays properly				
Verify able to launch the Clinical Reconciliation module from the Medications Module				
NOTE: ePrescribing, faxing, ePA, EPCS, RTBC, and Medication Reconciliation cannot be tested until go live.				

Allergies Module	Passed Testing	Failed Testing	Comments	Client Initials
Add allergies with multiple reactions with reaction severities				
Verify able to change order of reactions listed for allergy				
Confirm all allergies and their associated reactions/severities display correctly in grids and documents				
Verify able to add criticality to new and existing allergies				
Verify able to launch the Clinical Reconciliation module from the Allergies Module				
Problems Module	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Verify able to add and update Clinical Problems in the Problem List				
Verify able to add and update ICD diagnosis to the Billing ICD List				
Verify able to launch the Clinical Reconciliation module from the Problems Module				
Orders Module	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Create new lab and radiology orders				
Confirm preview of new lab and radiology requisitions				

AUC TESTING (if applicable) – able to calculate AUC score, verify “indication not found” checkbox in indications window, verify modifiers and g-code generated				
Verify able to manually add results to orders (if applicable/normal practice workflow)				
Verify results on Results tab display correctly				
NOTE: If lab interface exists, will not be able to test interface functionality until go live.				

Immunizations *(if applicable)*	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Enter multiple historical vaccines at one time (if applicable)				
Place and complete an immunization order				
Generate Immunization Report and verify data displays properly				
NOTE: If immunization registry interface exists, will not be able to test interface functionality until go live.				

PAQ	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Items display properly in provider’s PAQ				
Providers can sign-off on items in PAQ				
Verify sign-off displays on PAQ items after signing				
Add Sign-off Comments to lab result and verify comments display in Orders Module under Sign-off and Tracking Comments panel				
NOTE: Previously generated documents and scanned images will not populate in the TEST environment and if opened, may result in an error.				

Client CARD Testing Checklist (6.2021.1 Upgrade)

Workflow/Inbox	Passed Testing	Failed Testing	Comments	Client Initials
Appointment schedule displays accurately in the EHR inbox				
Tasks display accurately in EHR inbox				
Verify the hover function for patient information is working				
Confirm accuracy of number indicator on tabs for pending items				
Verify the filters tabs contain the correct tasks (if applicable)				
Create new EHR task and assign to user/group				
Create new PM task in EHR (if applicable)				
Accept an EHR task				
Reassign an EHR task				
Decline task				
Verify tasking from template functions correctly				
Verify new Message Manager View tab able to be viewed NOTE: User must have appropriate permissions in System Administrator to view new Tab for Clinical Message Manager (formerly Rosetta Holding Tank)				
Document Management	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**

Scan & file new item				
Complete a file import				
Complete a batch import				
Patient Education	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Can launch Patient Education from File Menu, Problems Module, Medications Module, and Procedures Module				
Confirm able to save patient education documents to patient's encounter				
CPOE Search Bar *(If applicable)*	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Verify the CPOE search bar displays				
Verify performing entities display				
Create Lab, Diagnostic and Immunization order and confirm place order				
Crystal Reports	**Passed Testing**	**Failed Testing**	**Comments**	**Client Initials**
Run all custom Crystal Reports used (if applicable)				
Confirm the ability to run TSI crystal reports and view information displays properly • Missing Chart Note • Unsigned Chart Note • Pending Orders by Appt Date				

EHR Customizations

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Customization Status	Client Initials
I have discussed customizations with my TSI Upgrade Specialist and evaluated our practice's need for customizations in 6.2021.1. Based on this evaluation (mark ONE response only): ☐ We do not need any customizations completed prior to the 6.2021.1 upgrade. ☐ We would like TSI to complete our customizations. All customizations needed prior to our 6.2021.1 upgrade have been submitted to TSI Healthcare on the (separate) Customization Request Form. ☐ We will complete our own customizations prior to the 6.2021.1 upgrade.	
I understand that any customization requests submitted after go live on 6.2021.1 will be addressed through the standard development request process.	

Client CARD Testing Checklist (6.2021.1 Upgrade)

Prior to Go Live	
Description	**Client Initials**
I understand that:	
• All EHR documents should be generated for all encounters by close of business on upgrade weekend	
• All items in PAQ should be signed off on by close of business on upgrade weekend	
• All Document Management batches should be filed by close of business on upgrade weekend	
• All Patient Portal messages should be accepted/denied by close of business on upgrade weekend	
• All eRx requests should be accepted/denied by close of business on upgrade weekend	
• All NextPen forms should be accepted/denied by close of business on upgrade weekend	

Additional Testing Notes/Comments (attach additional pages if needed):