Health New Zealand
Te Whatu Ora

interRAI™
New Zealand

How to prepare for the
interRAI Upgrade August 2024

Information for community assessors and NASC managers

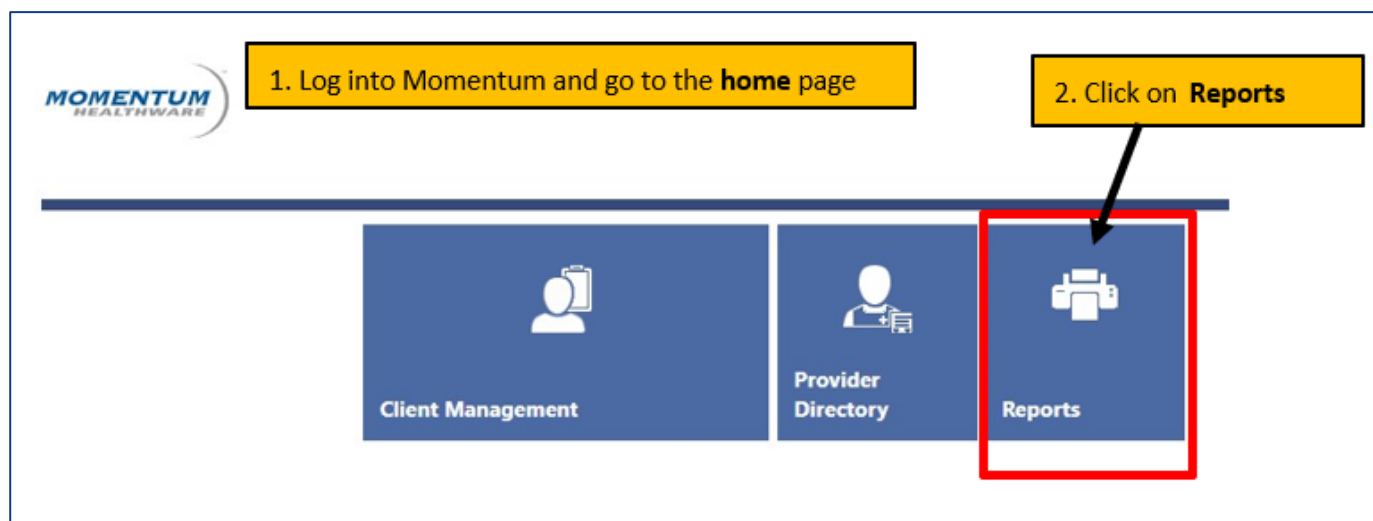**An upgrade is planned for 9 August 2024**
The interRAI national software system (Momentum) is being upgraded on 9 August 2024. The upgrade is introducing a number of changes that will make it easier to work with your assessments.

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. **All checked out records need to be checked back in where possible to avoid loss of assessment information.** Check In Check Out is being phased out and will not be able to be accessed after the upgrade.

2. Click on Checked Out Client Record report

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

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

Client Management

Provider Directory

Reports

	Report Title	Report Category	Description
		(All) ▼	
⇨	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

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.

Incomplete Assessments
Training Practice office CDHB

Provider: All   Record Status: Active

NHI   Client   Assessment Reference Date   Reason for Assessment

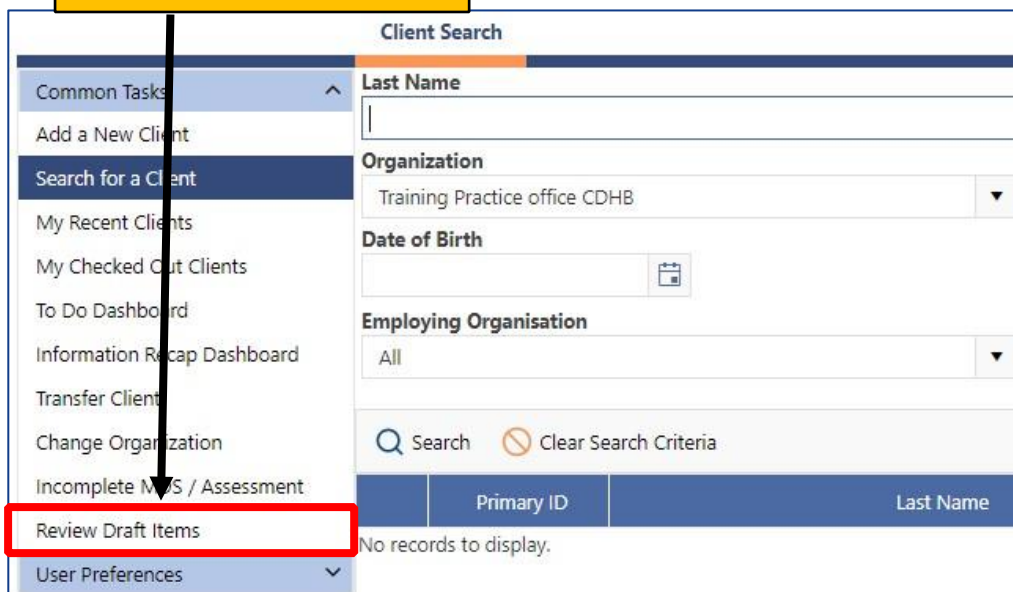MDS Assessments ready to be marked complete

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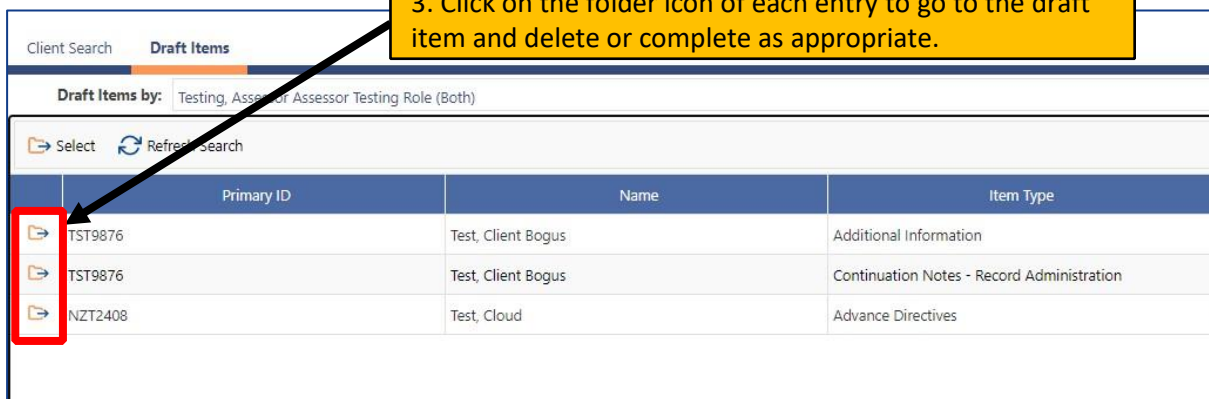
1. Log into Momentum and go to the **home** page

2. Click on **client management**
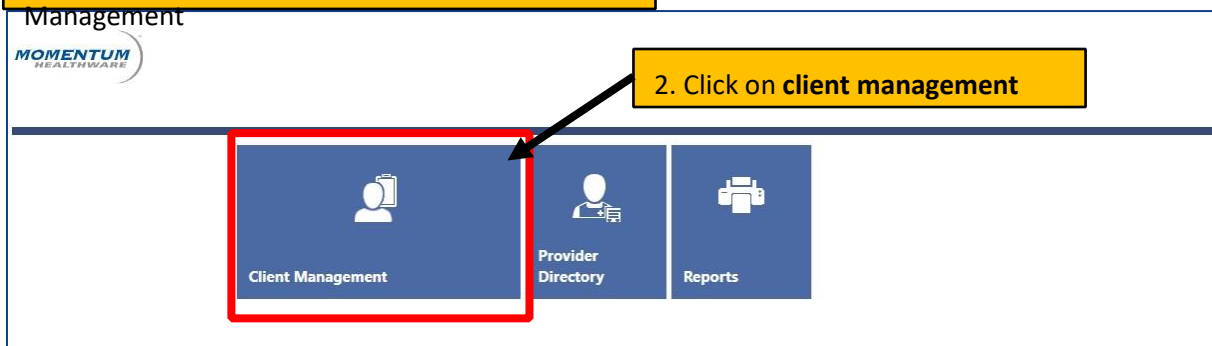
3. Click on **Review Draft Items**

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

	Primary ID	Name	Item Type
📂	TST9876	Test, Client Bogus	Additional Information
📂	TST9876	Test, Client Bogus	Continuation Notes - Record Administration
📂	NZT2408	Test, Cloud	Advance Directives

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.