### Health New Zealand Te Whatu Ora



### What's New

### interRAI Software Upgrade

August 2024 Version 4.00.0142.0056

Version 5

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### Introduction

This document outlines the new and updated features for the upgrade of the interRAI Assessment Software from version 4.00.0138.0017 to version 4.00.0142.0053 The upgrade will occur in August 2024.

**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 <u>website</u>.

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

### 1. New features for this upgrade

### **1.1** Changes that affect all users

### 1.1.1 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.

### 1.1.2 The Gender option 'Indeterminate' has been changed to 'Other'.

#### 1.1.3 Current password must be used when resetting a password.

When resetting your password, users will need to enter their current password as well as their new password to complete the change (except when using the 'Forgot Password' function).

CIVICA	Change Password
Resident Search Change Pass	word
Common Tasks 🗸 🗸 🗸	🖹 Save 🗠 Cancel
Mobile 🗸	User Id
User Preferences	alextest
Change Password	Current Password
Profile	
User Settings	New Password
	Retype New Password

### 1.2 Changes that affect LTCF users

#### 1.2.1 New look for the LTCF assessment

The LTCF 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.

### 1.2.2 Change to Section N – Medications

Medications are no longer entered individually for N1, instead only a count of the number of prescribed medications is entered.

Section N. Medications	Check Errors	Mark Complete
N1. Total Number Of Medications In Last 7 Days. Record the number of different medications (prescription and over-the-counter), including eye and ear drops, taken regular days (note: also include medication taken on a maintenance basis. Enter 15 if 15 or higher).	rly or on an occasional ba	3 🖓

For information on this change, please refer to the <u>Total Number of Medications</u> coding help on our website.

1.2.3	New lay	out for	Advanced	<b>Directives</b>	items	(P2)

P2. Advance Directives
P2a. Advance Care Planning discussions started
Not started (0)
Started (1)
P2aa. Note
P2b. Advance Care Plan documented
Not documented (0)
Documented (1)
P2ba. Note
P2c. Advance directive documented
Not documented (0)
Documented (1)
P2ca. Note
P2d. Other treatment restrictions
Not documented (0)
Documented (1)
P2da. Note

For information on these items and how to code them, please refer to the <u>Responsibility and</u> <u>Directives guide</u> on our website.

### 1.2.4 New Outcome Scales for LTCF assessment –First Fall Risk Scale, Clinicianrated Mood Scale, Composite Mood Scale and Self-Report Mood Scale

For information on these scales, please refer to the <u>New LTCF Outcome Scales guide</u> on our website.

## 1.2.5 Number of diagnoses from the Disease and Diagnoses History that can be added in I2 in the assessment is reduced to six

When more than six diagnoses are checked for 'Use in MDS' only the first six in alphabetical order will be included in the assessment.

### **1.3 Changes that affect Community users**

### **1.3.1 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 <u>Skills Booster</u>

<u>session</u> so that you can be updated on all of the changes. If you are unable to attend, here is a recording of a session that you can view: <u>https://youtu.be/XP9aBwKqwUI?si=deK4zfedwxzELx0v</u>

### **1.3.2** New look for the Home Care and Contact assessments

The Home Care and Contact assessments have 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.

### 1.3.3 New item Home Care and Contact assessments (HC – A13d&e, CA – B3b&c)

The Home Care and Contact assessments have two new items around home rental/ownership.



For information on these items and how to code them, please refer to <u>Rented Dwelling and Sector</u> <u>of Landlord Items</u> on our website.

### **1.3.4** Change to Section M – Medications (Home Care)

Medications are no longer entered individually for M1, instead only a count of the number of prescribed medications is entered.



For information on this change, please refer to the <u>Total Number of Medications</u> coding guide on our website.

### 1.3.5 New layout for Advanced Directives items (O2 – Home Care)

O2a. Advance Care Planning discussions started	
Not completed (0)	
Completed (1)	
O2aa. Note	
O2b. Advance Care Plan documented	0
Not documented (0)	
Documented (1)	
O2ba. Note	
O2c. Advance directive documented	0
Not documented (0)	
Documented (1)	
O2ca. Note	
O2d. Other treatment restrictions	0
Any treatment restrictions recorded?	
No (0)	
Yes (1)	
O2da. Note	

For information on these items and how to code them, please refer to the <u>Responsibility and</u> <u>Directives</u> resource on our website.

### 1.3.6 New automatic coding rule for P1 and P2

When P1a1 is coded as 'No Informal Helper' all items in P1 will automatically be coded as 'No informal helper', and P2a-c will be coded as 'No' and are not able to be modified until P1a1 coding is changed.

When P1a2 is coded as 'No informal helper', P1b2-P1d2 will automatically be coded as 'No informal helper' and are not able to be modified until P1a2 coding is changed.

# 1.3.7 New Outcome Scales for Home Care assessment – Caregiver Risk Evaluation (CaRE), Frailty Scale, First Fall Risk Scale, Clinician-rated Mood Scale, Composite Mood Scale and Self-Report Mood Scale

For information on these scales, please refer to the <u>New HC Outcome Scores</u> guide on our website.

# 1.3.8 Number of diagnoses from the Disease and Diagnoses History that can be added in I2 (Home Care) or D5 (Contact) in the assessment is reduced to six

When more than six diagnoses are checked for 'Use in MDS' only the first six in alphabetical order will be included in the assessment.

### **1.4 Changes that affect Palliative Care users**

#### **1.4.1** New look for the Palliative Care assessment

The PC 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.

## 1.4.2 Item O4d: Family or close friends report feeling overwhelmed by person's illness.

This item is now compulsory.

### 1.4.3 New automatic coding rule for O2 and O4

When O2a1 is coded as 'No Informal helper' all items in O2 will automatically be coded as 'No informal helper', and O4a-d will be coded as 'No' and are not able to be modified while until O2a1 coding is changed.

When O2a2 is coded as 'No informal helper', O2b2-O2e2 will automatically be coded as 'No informal helper' and are not able to be modified until O2a2 coding is changed.

### 1.4.4 New items Palliative Care assessments PC – A16b&c



For information on these items and how to code them, please refer to <u>Rented Dwelling and Sector</u> <u>of Landlord Items</u> guide on our website.

### 1.4.5 Change to Section L – Medications

Medications are no longer entered individually for L2, instead only a count of the number of prescribed medications is entered.

Section L. Medications Check Errors Mar	k Com <mark>pl</mark> et
L1. Allergy to Any Drug	0 6
No known drug allergies (0)	
Yes (1)	
L2. Total Number of Medications	60
Record the number of different medications (prescription and over-the-counter), including eyedrops, taken regularly or on an occasional basis in the last 7 days. (Note: Also include medications taken on a maintenance basis.)	
Code number (enter 15 if 15 or higher)	
	104

For information on this change, please refer to the <u>Total Number of Medications</u> guide on our website.

### **1.4.6** New layout for Advanced Directives items (N2)

N2a. Advance Care Planning discussions started		
	Not started (0)	
	Started (1)	
NZaa. Note		
N2b. Advance Care Plan documented		
	Not documented (0)	
	Documented (1)	
N2DA. NOTE		
N2c. Advance directive documented		
	Not documented (0)	
	Documented (1)	
N2ca. Note		
N2d. Other treatment restrictions		
Any treatment restrictions recorded:	No (0)	
	10 (0)	
	Yes (1)	
N2da. Note		
poster Anna anna Alfraga anna a		

For information on these items and how to code them, please refer to <u>Responsibility and Directives</u> guide on our website.

# 1.4.7 New Outcome Scale for Palliative Care assessment – Caregiver Risk Evaluation (CaRE)

For information on this scale, please refer to the <u>New Palliative Care Outcome Scores</u> guide on our website.

# 1.4.8 Number of diagnoses from the Disease and Diagnoses History that can be added in A10 in the assessment is reduced to six

When more than six diagnoses are checked for 'Use in MDS' only the first six in alphabetical order will be included in the assessment.

### **1.5 Changes that affect Acute Care users**

### **1.5.1** New look for the Acute Care assessment

The AC assessment has a new design. All Acute Care assessments (AC – Admission, AC – Discharge, or a review assessment) are completed by loading the same form (interRAI<sup>TM</sup> AC v9.3 (New Zealand v1)). 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.

### **1.5.2** Outcome scores are now available for this assessment.

ADL Hierarchy Scale, ADL Short Form Scale, Body Mass Index (admission and review only), Cognitive Performance Scale (CPS), Communication Scale, Short Depressive Scale (admission and review only), Pain Scale, Pressure Ulcer Rating Scale (admission only) are now available for the interRAI Acute Care assessments.

For information on these scales, please refer to the resources from the <u>AC Outcomes, Screeners</u> and <u>CAPs guide</u> on our website.

## 1.5.3 Screeners and identifiers for risk of adverse outcomes are now available for this assessment.

ADL Decline Risk Screener, Delerium Screener, Dementia Screener, Depression Screener (admission and discharge only), Falls Risk Screener, Pressure Ulcer Risk Screener, Readmission Screener, and Undernutrition Screener (admission and review only) are now available for the interRAI Acute Care assessments.

For information on these screeners, please refer to the resources from the <u>AC Outcomes</u>, <u>Screeners and CAPs guide</u> on our website.

## 1.5.4 Clinical Action Points (CAPs) are now available for the Acute Care Admission and Review assessments.

The Activities of Daily Living Prevention, Activities of Daily Living Treatment, Behaviour, Delerium Treatment, Depression and Anxiety, Falls and Pressure Ulcer Prevention, Pressure Ulcer Treatment, Readmission (admission only) and Undernutrition (admission only) CAPs are now available for the interRAI Acute Care Admission and Review assessment.

For information on these Clinical Action Points, please refer to the resources from the <u>AC</u> <u>Outcomes, Screeners and CAPs guide</u> on our website.

### **1.5.5** There is now an Assessment Summary section in the Acute Care assessment.

Information on how to use the Assessment Summary can be found here: <u>AC Outcomes, Screeners</u> and <u>CAPs guide</u>

# 1.5.6 Responses are cleared from Sections B-M of the Acute Care Discharge assessment when the person is marked 'Deceased' in A12 and the assessment is then marked complete.

## 1.5.7 Planning and research consent item has now been added at the start of the assessment.

To code this item, ask the person if they consent to their assessment data being used for research. All identifying information such as name, address and NHI will be removed. Please note, this consent item relates to data only. For consent to complete the assessment, please follow your organisation's processes and add a note if this is a requirement. More information can be found in the online workbook in Unit 1.

### 2. Single Page Application (SPA) assessments

This section applies to the new design for the LTCF, Home Care, Contact, Palliative Care and Acute Care assessments.

#### **Assessment Controls**

There are the 5 action buttons at the top of the assessment, and section piano keys on the lefthand 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.



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



The assessment opens on one page that users can scroll through or use the navigations keys to go to a certain section.

Only sections needing to be completed (based on coding of previous sections) will be displayed.

Navigation	Save	Complete	Check Errors	Clear Errors		Outputs
Reason for Assessment and Date	Section B.	Intake and Initial History			Check Errors	Mark Complete
A. Identification Information						
I. Intake and Initial History	Castlan C	C			Check Errors	Mark Complete
Cognition	Section C.	Cognition				
Functional Status	C1 Comitive S	kills for Daily Decision Making				n 🖓 🙆
Continence	Making decision	s regarding tasks of daily life - e.g., when	to get up or have meals, which clothes	to wear or activities to do		••••
0 / D E IE	O Independe	nt—Decisions consistent, reasonable, and	safe (0)			
biddon as C1 = No	O Modified in	ndependence—Some difficulty in new sit	uations only (1)			
liscemable consciousness	O Minimally i	impaired—In specific recurring situations	, decisions become poor or unsafe; cue	s/supervision necessary at the	ose times (2)	
coma [Skip to Section G]	O Moderately	/ impaired—Decisions consistently poor	or unsafe; cues / supervision required a	t all times (3)		
	O Severely in	paired-Never or rarely makes decisions	; (4)			
. Medications	No discern	able consciousness, coma [Skip to Sect	ion G] (5)			
. Treatments and rocedures	(					
Responsibility and Directives	Section G.	Functional Status			Check Errors	Mark Complete

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	e and Initial History		4	Check Errors	Mark Complete
Section C. Cogn	ition			Section controls	Reopen
Completed By	Colliss, Alex Assessor	Testing On 2024/04/16	sessor information on se	ction completion	
					0000
C1. Cognitive Skills for Making decisions regard Independent—Dec	ing tasks of daily life - e.g., when isions consistent, reasonable, and	to get up or have meals, which clothes I safe (0)	to wear or activities to do		
C1. Cognitive Skills for Making decisions regard Independent—Dec Modified independent Minimally impaire	Daily Decision Making ing tasks of daily life - e.g., when isions consistent, reasonable, and lence—Some difficulty in new sit d—In specific recurring situations	to get up or have meals, which clothes f safe (0) uations only (1) c, decisions become poor or unsafe; cu	to wear or activities to do	se times (2)	
C1. Cognitive Skills for Making decisions regard Independent—Dec Modified independ Minimally impaire Moderately impair	Daily Decision Making ing tasks of daily life - e.g., when isions consistent, reasonable, and dence—Some difficulty in new sit d—In specific recurring situations ed—Decisions consistently poor	to get up or have meals, which clother f safe (0) uations only (1) c decisions become poor or unsafe; cu or unsafe; cues / supervision required	to wear or activities to do es/supervision necessary at the at all times (3)	se times (2)	
C1. Cognitive Skills for Making decisions regard Independent—Dec Modified independ Minimally impaire Moderately impaire Severely impaired	Daily Decision Making ing tasks of daily life - e.g., when isions consistent, reasonable, and lence—Some difficulty in new sit d—In specific recurring situations ed—Decisions consistently poor —Never or rarely makes decisions	to get up or have meals, which clother f safe (0) uations only (1) c, decisions become poor or unsafe; cu or unsafe; cues / supervision required s (4)	to wear or activities to do es/supervision necessary at tho at all times (3)	se times (2)	
C1. Cognitive Skills for Making decisions regard Independent—Dec Modified independ Minimally impaire Moderately impaire Severely impaired No discernable cor	Daily Decision Making ing tasks of daily life - e.g., when isions consistent, reasonable, and dence—Some difficulty in new sit d—In specific recurring situations ed—Decisions consistently poor —Never or rarely makes decisions raciousness, coma [Skip to Sect	to get up or have meals, which clothes f safe (0) uations only (1) c, decisions become poor or unsafe; cu or unsafe; cues / supervision required s (4) ion G] (5)	to wear or activities to do es/supervision necessary at the at all times (3)	se times (2)	

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.

Save	C	omplete	Check Errors	Clear Errors	
Section	Errors and Ward Validation errors	arnings and warnings have	e occurred		
A7. Eligi	Errors/Warnings	Description			Use scrollbar when there is a long list
A7a. New	Error:	A7a. New Zeala	nd resident / citizen This field is	required.	of errors/warnings to review
	Error:	A7d. UK or Aust required.	ralian citizen visiting NZ This fie	dis	
	Error:	A7e. ACC accep	ted claims This field is required.		
	Error:	A10a. (255 char	acters max) This field is required		Error/Warping and information on why
This field is r	Error:	A10b. Primary C	ioal This field is required.		coding does not pass assessment
A7b. Wor	Error:	A12. Residential field is required	/Living status at time of assess	nent This	validation check
	From	A12a Liver This	field is required		
A7c. Aust	ralian resident in NZ			ОК	Use OK to close the window when finished reviewing

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 of the items in the section.

Section H. Continence	Click 'Clear Errors' to dis items in the section	check Errors Mark Comple
H2. Urinary Collection Device (Exclude pads	/ briefs)	• 7
	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		• P
	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 Making decisions regarding tasks of daily	Making / life - e.g., when to get up or have meals, which clothes to wear or activities to do	elp icon 🗪 🛛 🖓 🥥
Independent-Decisions consistent	, reasonable, and safe (0)	
O Modified independence-Some di	fficulty in new situations only (1)	
O Minimally impaired—In specific rea	curring 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	
	Sec. Intent	
	To record the person's actual performance in making everyday decisions about the tasks of daily living. These items are expecially important for further assessment and	
Item help pop-up window	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	
	Here are some examples of decision-making tasks.	those times
	Choosing itams of slothing:	
	© CK	

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.

or unsafe; cues/supervision necessary at those times (2)
or unsafe; cues/supervision necessary at those times (2)
or unsafe; cues/supervision necessary at those times (2)
ion required at all times (3)
Comment icon is yellow if there is a
Comment icon is yellow if there is a
which clothes to
or unsafe; cues/supervision necessary at those times (2)
sion required at all times (3)
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.		
This field is required. A7b. Work Visa		Required item, coded and passes assessment validation check
This field is required. A7b. Work Visa	No (0)	Required item, coded and passes assessment validation check
This field is required. A7b. Work Visa	No (0) Yes (1)	Required item, coded and passes assessment validation check

### 3. Mobile app (for offline use)

The mobile app is available to use with the new SPA assessments. It will work for the Home Care, Contact, Palliative Care, LTCF and Acute Care assessments. Currently the ACC Contact is not able to be completed using the mobile app.

### 3.1 Installing the Mobile app

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



### 3.1.4 Google Chrome

3.1.4.1 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.

		1. Click on <b>Install App</b>	
Momentum	Install app?	×	
User ID Password	Install	2. Click <b>Install</b> in the pop-u	p window
	codini.		

3.1.4.2 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.

### 3.1.5 Microsoft Edge

3.1.5.1 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.

	Install Momentum Mobile app Publishen: civicauatmobile.interrai.health.nz Use this site often? Install the app which:     Opens in a focused window     Has quick access options like pin to taskber     Syncs across multiple devices	
User ID	Install 4 2. Click Install in the pop-up win	do
Password		

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

Momentum Mobile - Civica	6)	
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  Pin to taskbar  Pin to 5sart  Create Desktop shortcut Auto-start on device login	
User ID	Allow Don't allow	
Password		

- **3.1.6** 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.
- **3.1.7** 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'.



**3.1.8** 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/Resident' page will be displayed.

### 3.2 Adding and removing client/resident files for offline use

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

#### **First Method**

- **3.2.3** Search for the client and go to their overview page.
- **3.2.4** 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     Mobile Offline
Enter a New Continuation Note Add a New Client Search for a Client	Testing, Alex A e Likes to be called

**3.2.5** 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.

olliss, Alex (Last Sync: 08/04/2024 16:48)
dentifiers

3.2.6 To remove the person for use offline, click on **Remove Client from Mobile Offline**.

CIVIC	<b>`</b>	Client Overvio	ew				
Client Search	Client Overview	Case Activity	Forms	Care Plan	MDS	Continuation I	Note
Common Tasks Client Overview	^ 1	🕞 Return 🔋 R Full Name	emove Clie	nt from Mobile	Offline		ick on Remove Client from Mobile Offline
Enter a New Cont Add a New Client Search for a Clien	inuation Note	Testing, Alex A e Likes to be called	i.				_

### Second Method

3.2.7 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		NZ HC Testin 2. Click on My Mobile Offline Clients
All Mobile Offline Clients		Date of Birth

**3.2.8** 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 Mo	obile Offli	My Mobile Offline Clients					
Common Tasks	~	Last Name		1. E	nter the person's NHI number		Primary ID
Message Centre	~				under Primary ID	_	88B1234
Mobile	^	Provider			Organization ID		Record Status
Mobile App Installations		All	1	Q	ZZ_ Training Practice office HC	-	Active
My Mobile Offline Clients			0	and the			
All Mobile Offline Clients		Q Search	2. Click on Sear	ch			
User Preferences	~	La	st Name		First Name Prima	iry ID	Record Status
		Community Case		Study	3. List of files match criteria will ap	ing sea pear	rch

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

CIVICA		My Mobi	le Offline Clients				
Client Search My Mob	ile Offli	ne Clients					
Common Tasks	~	Last Name		1	First Name		Primary ID
Message Centre	~						BBB1234
Mobile	^	Provider	4				Record Stat
Mobile App Installations		All	4. Click to add a check m	hark next to	the client files to be used o	offline	<ul> <li>Active</li> </ul>
My Mobile Offline Clients							
All Mobile Offline Clients		Q Sez	Update Mobile Offline Client List		5. Click on Update Mobile	e Offline Clie	nt List
User Preferences	~		Last Name		First Name	Primary ID	Record Stat
		🕺 Co	mmunity Case	Study		BBB1234	Active

**3.2.10** 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**.

### 3.3 Checking clients/residents marked for offline use

### 3.3.1 Go to All Mobile Offline Clients

**3.3.2** 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 Client Search All Mobile Off	All Mobile Offline Cli	ents						£1010	
Common Tasks	Last Name		]	First Name		Primary ID			
Mobile App Installations My Mobile Offline Clients	Marked for Mobile Offline I Colliss. Alex Assessor Testing	зу	a a	the magnifying class icon					
All Mobile Offline Clients User Preferences	Q Search	2. Click on	Search						
	Last Name	First Name	Test	Organization Name	Marked for Offline by	User Id	Device info	Last Sync	
	Community	Case Study	ZZZ0066	NZ HC Testing Facility 2024	Colliss, Alex				
	C= Testing	Alex A	ACA2023	NZ HC Testing Facility 2024	Colliss, Alex				
	C=> Testing	Alex Tablet	AC82024	NZ HC Testing Facility 2024	Colliss, Alex				

**3.3.3** You can use the file icon to the left of the persons name to go to their file and make changes.

# 3.4 Synchronisation between the Mobile app and web-based application

- **3.4.1** While using the Mobile app connected to the internet, the client record and assessments are continuously synchronised.
- **3.4.2** After adding clients to use offline, log into the app before disconnecting from this internet. This transfers your client/resident information into the app.
- **3.4.3** 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.
- **3.4.4** Re-connecting to the internet and logging to the Mobile app automatically updates the client/resident records you marked for synchronisation in the web-based application.
  - 3.4.4.1 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.
  - 3.4.4.2 After this, we recommend removing all the clients from your list of clients/residents marked for offline use.

### 3.5 Navigating the app

- **3.5.1** Selecting an organisation
  - 3.5.1.1 Only those organisations that you have permission to access are displayed
  - 3.5.1.2 Select the organisation you want to work with.

Momentum Mo	bile - Civica	Θa	15	-	ā	×
Select O	rganisation				Offline	=
Q ZZ_	T					×
	ZZ_ Training Practice office HC Z					
	ZZ_ Training Practice office LTC Z					

#### **3.5.2** Selecting a client record

3.5.2.1 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	₽	ស	 	۲	×
	← Select Client			0	Online	H
	Q Search					
File can only be accessed online while using the app	Brown, John XYZ1002			Mal	e, Age 8.	5
Arrows indicate the file can be accessed offline while using the app	Doe, Jane ABC1234			Femal	e, Age 7	D

- 3.5.2.2 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.
- 3.5.2.3 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 Ove	erview				Offline	=
Use the return to Age: 61	back arrow to the client list	s, Test Client 2 ACB2023				
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 Stree Oneville Onetown 111 New Zealand 1231	et 1		

#### **3.5.3** Finding an existing assessment

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



3.5.3.2 Click on 'Forms and Assessments'



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



- 3.5.3.4 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.
- **3.5.4** Add a new assessment or form.
  - 3.5.4.1 One the client overview page, click on the three lines in the top right-hand corner of the app window.

Momentu	um Mobile - Civica											
÷	Client Overview	Click on the three lines in the top right-hand corner of the app window	=									
	Colliss, Test Chent 2											
		ACB2023										
Male												
Age: 61	1											

3.5.4.2 Click on 'Forms and Assessments'.

Momentum Mobile - Civica									
← Client Overview						0	)ffline	=	
	Collis	s, Test Client 2 ACB2023	2	Change (	Organi Client	sation			
Male Age: 61	Click on 'Forms	s'	Forms and Assessments						
				Logout					
Organisation Name ZZ_ Trainin	g Practice office HC	Status	Activ	ve					

3.5.4.3 Click on the blue circle with the plus sign.

Momentum Mobile - Civica	Ca	зř.		ш	×
← Assessments			Off	line	=
Colliss, Test Client 2 ACB2023 Male Age: 61					
interRAI <sup>™</sup> HC v9.3 (New Zealand v1)			09/06/2	raft 2024	
Click on the blue of	ircle ic	on			Ð

3.5.4.4 Select the required assessment or form from the list

		Θa	:	—	×
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)				
Ú	interRAI™ PC v9.3 (New Zealand v4) interRAI™ Palliative Care v9.3 (New Zealand v4)				

3.5.4.5 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.

### 4. 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						
Erroring out assessments							
Users are currently not able to error out an assessment. If you need assistance with this, or correcting an assessment that has been marked complete, please contact your interRAI Educator or email <u>interRAI@tas.health.nz</u>							
This can only be requested by the person who has completed the assessment.							
For corrections to an assessment:							
<ol> <li>The request must be within five days of the assessment being marked complete.</li> </ol>	Fix in progress						
<ol><li>Open a new draft assessment of the same type and make the changes needed.</li></ol>							
<ol> <li>Contact us to error out the incorrect assessment. You will not be able to save your new draft assessment as complete until we have errored out the incorrect one. We will let you know when we have completed this.</li> </ol>							
4. Mark your new assessment complete.							
Urinary Incontinence CAP not calculating correctly in the Home Care assessment. Please review this CAP with each assessment to make sure there are not issues that need addressing even if the CAP hasn't triggered.							
There are some minor cosmetic issues (for example spelling and grammar in item help sections) that we are aware of and will be resolved in coming updates.							
The community care plan presenting situation is not displaying with line breaks in the current care plan screen.	Fix in						
The line breaks entered are present when viewed in the presenting situation, and in the care plan report.							
Domicile code, language, or facility code are not populating from the overview into the assessment. This error is happening on occasion for a few users. Please email interRAI@tas.health.nz for help resolving this issue.							

Middle name character lim characters. To correct:	iit in l	LTCF	ass	sessr	men	t. This	s fie	ld is currently limited to 11	
1. Click on the reside	nt's n	ame	on t	he C	ver	view I	⊃ag	e	
2. Click +Add									<u> </u>
3. Enter the first and second names without the middle name on a new line									Fix in proaress
4. Tick 'Display as Cu the other line.	irrent	t' for t	his ı	new	nam	ne, an	d u	ntick 'Display as Current' on	1 0
5. Navigate back to y will be able to mark	our a ‹ you	sses r ass	sme essr	nt ar nent	nd th con	ne nar nplete	ne v e.	will have updated and you	
Return button in Diseases assessment when these s	and creer	Diagi ns are	nose e aco	es an cess	ld C fror	ontinu n with	uatio in a	on notes creates a new draft a SPA assessment.	
When in Diseases and Diagnoses or the Continuation notes, go back to the assessment by clicking on MDS/Assessment in the banner menu, and then choose the draft assessment from the list.									Fix in progress
Audit Report by User – Assessments completed This report will not return information for assessments completed in the SPA format.									Fix in progress
Some users are not able to entering the Assessment F as the year, the software r assessment complete but manually entering the ARE once and to give the softw	o pro Refer egist the s ) and are a	perly ence ers th oftwa l insta a few	con Dat nis a are le ead seco	nplet e (Al s 002 eave use t onds	e th RD) 24, 1 s it i the c for	eir as . This not 20 in dra date p the da	ses is t )24. ft. V oicko ate	sments when manually because if a user types '24' . The user can still mark the Ve recommend users avoid er, remembering to click only to populate.	
Assessment Reference Date	09/09/	2024						0	
Are you happy for your assessme any other identifying informatio	er Se n	eptembe	er 2024		<	Today	>	arch? Your name and address and	Fix in
Client or person entitled to control	S.)	MO	TU	WE	TH	FR	SA		progress
O client disagrees or client is not	1	2	3	4	5	6	7	titled to consent on behalf of dient	
Codyrees	8	9	10	11	12	13	14		
interioAl ** 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	
						W	12		