MEDITECH C/S 5.6 Update
Tips and Tricks

May 6, 2011

Peter Miessner
Senior Consultant
MEDITECH C/S 5.6 Update Tips and Tricks

- First Steps
- Resources
- Upgrade Process
- ARRA Top Off
- Go Live
- Acknowledgements
- Questions
MEDITECH C/S 5.6 Update Tips and Tricks

- **First Steps**
  - Review User Access and Custom Menus
  - Review NPR Reports and Customer Defined Screen
  - Review Hardware
  - Attend Meditech Webinars and In Person Sessions as available
  - Begin Looking at Top Enhancements
  - Utilize Meditech’s Upgrade Portal
    - [https://www.meditech.com/Updates/UPDccASupddoc.asp](https://www.meditech.com/Updates/UPDccASupddoc.asp)
MEDITECH C/S 5.6 Update Tips and Tricks

Resources

◊ Hardware / Technical
  • Windows 2000 cannot run Meditech 5.64 pp21 or 5.65 pp5 or later
  • If you are considering taking the 5.6x upgrade have Meditech Perform a Hardware Assessment as soon as possible
  • If the hardware assessment doesn’t suggest replacing or upgrading any servers you will still need to add at least 3-5 servers*
  • Remote Servers such as Citric or Terminal Servers will have some extra strain

◊ Staffing
  • Meditech has a suggested Staffing Breakdown on its Website
  • A Project Manager / Lead and Super Users are also necessary in addition to the FTEs in the Staffing Breakdown
MEDITECH C/S 5.6 Update Tips and Tricks

- **Upgrade Process**
  - Creation of In House Ring
  - Creation of Test Ring
  - **UPT**
    - *User Access – Profiles – Desktops*
      - CDS Screens and NPR Reports
    - Enhancements and Process Changes
    - Training
    - Testing
MEDITECH C/S 5.6 Update Tips and Tricks

Step 2 - Testing/Prep Worklist

Current Selection (Comp/Tot): 6/26 Overdue: 2

<table>
<thead>
<tr>
<th>Resp</th>
<th>Item</th>
<th>Appl Status - Comp/Tot Prereq Insr</th>
<th>%</th>
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<tbody>
<tr>
<td>MT</td>
<td>MT: Define UPT Access for MEDITECH, LSS &amp; Initial Site User</td>
<td>UPT Complete 1</td>
<td></td>
</tr>
<tr>
<td>MT</td>
<td>MT: Verify UPT Toolbox Parameters</td>
<td>UPT Complete 1</td>
<td></td>
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<td>MT: Review Dictionary Audit Trail Purge Delays</td>
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<td>Site</td>
<td>Site: Define UPT Access for Additional Site Users</td>
<td>MIS Complete 1</td>
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<td>MT</td>
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<td>UPT Complete 1</td>
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<td>Site</td>
<td>Site: Sign-off on Update LIVE Date &amp; Start Time</td>
<td>MIS Complete 1</td>
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<td>Site: Setup External Links</td>
<td>MIS Complete 1</td>
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<td>MT Testing/Prep Items for ORM (Conv 5.5 to 5.6)</td>
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Start Info 01/13/11 @ 0927 by User: MT on Device: JBROWN
Complete Info 01/13/11 @ 0927 by User: MT on Device: JBROWN

Scheduling Details

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<td>-0D 0H 2M</td>
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MEDITECH C/S 5.6 Update Tips and Tricks

UPgrade Dictionary Tool

Application
Dictionary

Search

Mnemonic | Description
----------|----------------
ABS      | Abstracting Case Mix
ADM      | Admissions
AP       | Accounts Payable
ARM      | Authorization & Referral Management
BAR      | Billing/Accounts Receivable

UPgrade Dictionary Tool

Application
Dictionary

Search

Description | Mnemonic
Option Set   | ABS.OPTION.SET
User Access  | ABS.ACCESS
MEDITECH C/S 5.6 Update Tips and Tricks

- MIS Desktop prior to 5.6

- MIS Desktop 5.6

MIS
Analyst Desktop
User Maintenance Desktop
Alerts
Archives/Images
Background Jobs
Change Your Password/PIN
Communications
Emulate User
Report Scheduler
System Preferences
Clinical Dictionaries (A-E)
Clinical Dictionaries (F-O)
Clinical Dictionaries (P-Z)
Custom Defined Routines
GL Dictionaries
Medical Records Forms
Process Screen Dictionaries
Users
List MIS Parameters
MEDITECH C/S 5.6 Update Tips and Tricks

- Analyst Desktop
- User Maintenance Desktop
- Alerts
  - Archives/Images
  - Background Jobs
  - Change Your Password/PIN
  - Communications
  - Emulate User
  - Report Scheduler
  - System Preferences
  - Clinical Dictionaries (A-E)
  - Clinical Dictionaries (F-O)
  - Clinical Dictionaries (P-Z)
  - Custom Defined Routines
  - GL Dictionaries
  - Medical Records Forms
  - Process Screen Dictionaries
  - Users
  - List MIS Parameters

- Alerts
  - Process
  - Application Status Screens
  - Snapshot
  - Notifications
  - Pagers
  - Parameters
  - File Servers
  - Application Servers
  - Background Job Clients
  - Print Servers
  - Network
  - Applications
  - Alert System

- Parameters
  - Enter/Edit
  - List
  - Initialize
MEDITECH C/S 5.6 Update Tips and Tricks
### MEDITECH C/S 5.6 Update Tips and Tricks

#### Chart Review

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**New Activity**

**Chart Review**

**Rounding**

**My List**

**Recently Accessed**

---

**Patient Lists**

**Select Patient**

**Next Patient**

**Patient Profile**

**Edit Pt Data**

**Patient Audit**

**eMAR**

**EMR**

**Enter Orders**

**Stock Orders**

**Edit Orders**

**Reconcile Meds**

**Rx Audit**

**Interventions**

**ADR Events**

**Progress Notes**

**Fill Lists**

**MARs**

**Billing**

**Inventory**

**Interfaces**

**System Mgmt**

**Preferences**
MEDITECH C/S 5.6 Update Tips and Tricks

Rejections

<table>
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<th>Type</th>
<th>Dollars</th>
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<th>Accounts</th>
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Performance Metrics

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Dollars

- Claim
- Bill Cycle
- Pre-Bill

Average Days

- Claim
- Bill Cycle
- Pre-Bill
## MEDITECH C/S 5.6 Update Tips and Tricks

### Therapist Desktop - ANH/MAIN/NURS (Test) - PETER J. MIESNBER

<table>
<thead>
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<th>Category</th>
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<th>*Ordering Doctor</th>
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### MEDITECH C/S 5.6 Update Tips and Tricks

#### Tips and Tricks

**Ogre, Shrek T**

<table>
<thead>
<tr>
<th>DATE</th>
<th>OR ROOM</th>
<th>PATIENT NAME</th>
<th>DATE OF BIRTH</th>
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<th>PATIENT NUMBER</th>
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<td>OR ROOM 2</td>
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<td>85</td>
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</table>
MEDITECH C/S 5.6 Update Tips and Tricks

USER - Test User Profile

- **Mnemonic**: USER
- **Test User Profile**: [Image]

**Appl DB** | **Type** | **M/P** | **Menu**
--- | --- | --- | ---
MIS | NPR | M | users.own.menu
ADM.ANH | NPR | P | ADM.PAT.desktop.ui
BAR.ANH | NPR | M | zcus.cashier.drawer.menu
HUB.ANH | NPR | M | *

**Sign-on Facilities**

- **ANH**: [Image]
In Test and Possibly even after Go Live the This is the Most Common Error Message Users will receive.

- This error means that the User has not been granted access within the application.
### Step: 2 - Testing/Prep Worklist

#### Current Selection (Comp/Tot): 5/28  Overdue: 2

<table>
<thead>
<tr>
<th>Resp</th>
<th>Item</th>
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<tbody>
<tr>
<td>MT</td>
<td>MT: Define UPT Access for MEDITECH, LSS &amp; Initial Site User</td>
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<tr>
<td>MT</td>
<td>MT: Verify UPT Toolbox Parameters</td>
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<td>Site</td>
<td>Site: Define UPT Access for Additional Site Users</td>
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<td>MT</td>
<td>MT: Standardize Access to UI Desktops &amp; Setup Super Users</td>
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<td>Site</td>
<td>Site: Sign-off on Update LIVE Date &amp; Start Time</td>
</tr>
<tr>
<td>Site</td>
<td>Site: Setup External Links</td>
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<tr>
<td>MT</td>
<td>MT: Testing/Prep Items for CRM (Conv 5.5 to 5.6)</td>
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<tr>
<td>Site Grp</td>
<td>Site: NPR Customer Menu Processing</td>
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<td>Site Grp</td>
<td>Site: NPR Customer Report Processing</td>
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<td>Site</td>
<td>Site: Review &amp; Edit MIS Customer Defined Screen Entries</td>
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<td>Site Grp</td>
<td>Site: Confirm Access Dictionary Entries are Refiled</td>
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<tr>
<td>Site</td>
<td>Site: Review &amp; Test ALL Custom Code</td>
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#### Start Info
- 01/13/11 @ 0927 by User: MT on Device: JBrown

#### Complete Info
- 01/13/11 @ 0927 by User: MT on Device: JBrown

#### Worklist Item Details

<table>
<thead>
<tr>
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<th>ACCESS_CONTROL_MT</th>
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<td>Src</td>
<td>Type</td>
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<td>Program</td>
<td>UPT, UTIL parameters.ac...</td>
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<tr>
<td>Argument</td>
<td>STARTUP</td>
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<td>Affects Data</td>
<td>TEST</td>
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#### Scheduling Details

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<td>Target Start Date</td>
<td>Target End Date</td>
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<td>Duration Est</td>
<td>Act</td>
</tr>
<tr>
<td>Duration Diff</td>
<td>0D OH 2M</td>
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#### Notes
- Update ID: 16  Pathway: CS 5.5-5.65  Scheduled Live Date: 06/11/11 @ 0800  Last Step Completed: 1 - Testing/Prep Assessment
MEDITECH C/S 5.6 Update Tips and Tricks

Step: 2 - Testing/Prep Worklist

<table>
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<td>Site</td>
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**MEDITECH C/S 5.6 Update Tips and Tricks**

### Managed Case Application Lookup

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MEDITECH C/S 5.6 Update Tips and Tricks

Site: Review & Edit MIS Customer Defined Screen Entries

**UPgrade Tools**

Worklist Item Instructions

**Item:** Site: Review & Edit MIS Customer Defined Screen Entries

**Type:** Managed Special Case Utility

**Effective:** C/S Rel: 5.64 Pri Pack: 16

**Edit Instructions**

In the Enter/Edit CDS Screen's query multiple, users can no longer specify Row or Column for where to display the query label. Furthermore, the query response can no longer be set to the SAME or NEXT row as the query label. Instead, the user will only specify which page, section, and seq# that the query will appear within. All queries in a given section will appear in their own panel. In a given section, queries will appear in such a way that only one query exists per line. Because of this new setup, the 'First Field/Page/Section' multiple no longer exists.

Several type queries, Text type queries, and any checkbox/radio button queries must exist in their own section.

*HCIS ANH.TESTS.65*
MEDITECH C/S 5.6 Update Tips and Tricks

Site: Review & Edit MIS Customer Defined Screen Entries
Total Entries For Current Selection: 136

<table>
<thead>
<tr>
<th>Fixed by Site</th>
<th>Name</th>
<th>Last Edited</th>
<th>Sev</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️ 2010 ETH\HIP\FA</td>
<td>ETHN.HIPAA.FALL RISK SHORT ...</td>
<td>02/23/11 @ 1400 By MIESSN...</td>
<td>Med</td>
</tr>
<tr>
<td>✔️ 2010ETH\HIP\FR</td>
<td>ETHN.HIPAA.FALL RISK RECUR...</td>
<td>02/23/11 @ 1402 By MIESSN...</td>
<td>Med</td>
</tr>
<tr>
<td>✔️ BBKBM1</td>
<td>BONE MARROW QUESTION</td>
<td>02/23/11 @ 1405 By MIESSN...</td>
<td>Med</td>
</tr>
<tr>
<td>✔️ BBKDRORDERED:</td>
<td>BBK DR. ORDERED</td>
<td>02/23/11 @ 1407 By MIESSN...</td>
<td>Med</td>
</tr>
<tr>
<td>✔️ BBKTX</td>
<td>BBK TRANSFUSION REACTION</td>
<td>02/23/11 @ 1429 By MIESSN...</td>
<td>Med</td>
</tr>
<tr>
<td>✔️ CARDIOVERSION</td>
<td>CARDIOVERSION</td>
<td>03/14/11 @ 1134 By MIESSN...</td>
<td>Med</td>
</tr>
<tr>
<td>✔️ CATH LAB</td>
<td>CATH LAB PROCEDURES</td>
<td>03/10/11 @ 0848 By MIESSN...</td>
<td>Med</td>
</tr>
<tr>
<td>✔️ CCL E&amp;M SCREEN</td>
<td>CCL Eval and Mqt ASSESSMENT</td>
<td>03/14/11 @ 1103 By MIESSN...</td>
<td>Med</td>
</tr>
</tbody>
</table>

Enter/Edit Managed Case Entry Comments

Update ID: 16
Pathway: CS 5.5~5.65

Item: Site: Review & Edit MIS Customer Defined Screen Entries
Entry: DRAW SEND LABS

Search Hits: 1 - With a maximum severity of Medium.

1. Severity: Medium - # of Queries >= Max Rows
   Detail Line: This MIS Screen entry uses 21 Queries and its 'Screen Type' allows 'Max Rows' of 5.
Enhancements / Changes

- 5.6 has been streamlined to look more how FS applications such as PCM/PWM and to an extend PCS / EMR have looked since 5.56
- In 5.65 the F11 has been brought back from previous versions of 5.6 where it was removed
- Menu Items / Buttons are no longer underlined – However if you use the F8 key many will be brought back
Enhancements / Changes

Many applications have added a blue i that will allow you to see additional patient information relative to the application you are in.
Enhancements / Changes

- The advent of Desktops will lead to process / workflow changes
- EDM – in 5.65 ability to use PCS MAR instead of the ED MAR*
- ORM / SCH - will be a lot of build / rebuild – Decision to continue with CDS or convert to Assessments or do a combination of both*
- Formulary will need to be loaded in Test and then again shortly after Go Live
- Introduction of Transfusion Administration Record (TAR) and Immunizations Documentation
Training

- Training is a critical step in the 5.6 upgrade that is often over looked when prepping / planning for the upgrade.
- Meditech has a matrix that has been pretty close on their website [https://www.meditech.com/Updates/Subwebs/CS56/News/HCIS_StaffingGuide.htm](https://www.meditech.com/Updates/Subwebs/CS56/News/HCIS_StaffingGuide.htm)

Testing

- Super and End User Testing
- Parallel and / or Integrated Testing
ARRA Top Off

- Windows 2000 is not compatible with the ARRA Updates (5.64 pp21, 5.65 pp5)
- If you do not have the upgrade set as mandatory users will not be able to reset their passwords on machines without the upgrade*
- SCA has had performance issues, ranging from system slowness to scanners not working
- Alerts can get stuck in a loop checking for free space, in Test
- PT Log File Server will need to have enough space to accommodate 2-5 GB of data growth per month
- Performance issues when going from 5.6x to 5.64 pp21 or 5.65 pp5
MEDITECH C/S 5.6 Update Tips and Tricks

- **ARRA Top Off**
  - Large Number of DTS
    - 1000+ between 5.64 pp20 and pp21
    - Over 3500 DTS between 5.65 pp4 and pp5
  - Desktop Changes
    - *In some modules such as MM Desktops have changed between previous versions of 5.6 and 5.65*
ARRA Top Off

- Ability to print Continuity of Care Documents, which is a criteria for ARRA.
- Patient Instructions can be downloaded to comply with the Requirements to be given to a patient electronically.
- Also included in the ARRA top offs are DTS required for compliance of the 5010 transactions due January 1, 2012.
- Some of the foundation has also been put in the 5.65 pp5 Top Off for ICD10 Transactions.
ARRA Top Off

- PCM ability to check off that Medications have been reconciled
- RXNorm Nomenclature to meet ARRA requirements
- When documenting drugs from Dispensing machines such as Pyxis users the Ordering Provider and Frequency
- Improvements to EMR load time and ability foundation for viewing ICD10 Codes on Problem List
- LOINC Codes can now be passed to EMR for Continuity of Care Documentation (CCD)-5.65pp5
- New claim field 4010 REMIT introduced for Coordination of Benefits for 5010 transactions
- X12 5010 837 Professional Claim in 5.65pp5
MEDITECH C/S 5.6 Update Tips and Tricks

- Go Live

  - File, REFILE then REFILE again items through the UPT prior to the start of Pre Live
  - Pre Live
    - Begins a few days prior to Go Live. HR unavailable, no changes to EDM Tracker
    - Ensure worklists are cleared and preferences are reset to a small selection and then filed into UPT as applicable
  - Downtime EMR
  - Downtime Users, test thoroughly
    - Verify Nursing Assessments
    - Spot check Access, Frequent NPR Reports
  - Conversions – System Performance
    - Monitor system performance after Go Live
Acknowledgements

A Special Thank you to Anderson Hospital, in Maryville, IL [http://andersonhospital.org/](http://andersonhospital.org/) for allowing us to use screen shots from their system.
MEDITECH C/S 5.6 Update
Tips and Tricks

Questions?
MEDITECH C/S 5.6 Update Tips and Tricks

- If you have further questions please contact

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