



## TransIT – Testing and Plans

Presentation to TransIT Virtual User Group

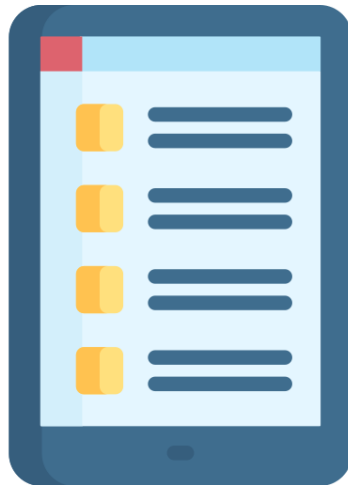
November 20, 2020



# Agenda

Topics for today

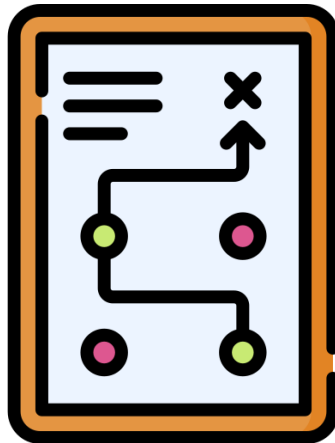
- Enhancements
- New scenario details elements
- Tip of the month



# Enhancements and Corrections

What's new since last time

- Enhancements:
  - Changed the filtering of available interface transactions to be same transaction, same facility
  - Plans Search Window defaults to available dates now and can be toggle to show the current date by clicking the Date link.
  - Added ability to send an email message when an issue is assigned
  - Employee Note visible on the Roster and the Users pages.



# Interface transactions: same transaction, same facility

What does that mean and what does it impact?

- TransIT displays all interfaces with that transaction added for that facility
- Can now show interface transactions that go through an interface engine to downstream systems on the Interface Testing page without the need for any additional steps on the Test Dashboard

The screenshot shows a software interface with a table of interface transactions. The table has columns for 'Reg Clerk', 'Interface', and 'Action'. The first row is highlighted in grey and shows 'Reg Clerk', 'Cerner', and 'PMLaunch'. The second row is highlighted in blue and shows 'Reg Clerk', 'Access Management - ERM - PMLaunch', and 'Click OK'. A detailed view of the first transaction is shown in a light blue box on the right. It contains the following information:

- ADT^A04: Cerner ADTs to Pyxis Cerner→ BD
- Patient Name: [Patient Name]
- MRN: [MRN]
- FIN: [FIN]
- ADT^A04: Cerner ADTs to PACS Cerner→ GE Healthcare
- Patient Name: [Patient Name]
- MRN: [MRN]
- FIN: [FIN]
- ADT^A04: Cerner ADTs to Engine Cerner→ Corepoint Health
- Patient Name: [Patient Name]
- MRN: [MRN]
- FIN: [FIN]
- ADT^A04: Engine ADTs to TeleTracking Corepoint Health→ TeleTracking
- Patient Name: [Patient Name]
- MRN: [MRN]
- FIN: [FIN]
- ADT^A04: Engine ADTs to Varian Corepoint Health→ Varian
- Patient Name: [Patient Name]
- MRN: [MRN]
- FIN: [FIN]

# Plans Search Window

Defaults to available dates now and can be toggle to show the current date by clicking the Date link

- Defaults range from the earliest incomplete activity to the latest
- Click the Date link to toggle the display to show activities that are to start today
- Manually set the date range to any other range you want to see

The screenshot shows the 'Plans Search Window' interface. At the top, there is a navigation bar with links: Home, Org Settings, Users, Tasks, Workflows, Scenarios, Testing, Issues, Training, Plans, Reports. The current page is 'Plans Search Window' for 'DEMO MAKE HEALTHCARE'. Below the navigation bar, there are filters for 'Rows: All', 'Type: Item(s) selected', 'Cat: 0 item(s) selected', 'Grp: 0 item(s) selected', and 'Status: 0 item(s) selected'. A 'Date range' filter is highlighted with a red box, showing 'From: 10/15/2020 12:00 AM' and 'To: 12/12/2020 12:00 AM'. Below the filters is a table of activities with columns: N/A, Type, Activity, Plan #, Assigned, Start, Finish, Dur., %, Status, Category, Group, and Comments. The table contains several rows of activity data.

N/A	Type	Activity	Plan #	Assigned	Start	Finish	Dur.	%	Status	Category	Group	Comments
1		send meds to OR	19	Eileen Black	15-Oct	16-Oct						
16	Activity	Begin non-passive PROD rebuild	2	All	08-Nov		4 hrs	25		Cutover	All	Delayed by 1 week and behind
8	Backload	Provide names of nursing backload resources to Core team	13 (13-9)	Brian Kottenstette	16-Nov 09:00					Pre-Cutover	Core	
9	Backload	Provide AD and OneChart access to nursing backload resources	13 (13-8)	Shruti	18-Nov 09:00		3 hrs		125	Pre-Cutover	Core	Dependency: List of names of resources
7	Activity	Generate and send packet to navilHealth	11	Crystal, Teri M	18-Nov 10:00		1 hrs			Pre-Cutover	Care Management	
8	Activity	Generate and send packet to Interqual	11	Crystal, Teri M	18-Nov 10:00		1 hrs			Pre-Cutover	Care Management	

# Send an email message when an issue is assigned

Improve turn-around time for issue resolution

- New field in the user record allows for emails to be sent when an issue is assigned, or when the assignment on an issue is changed
- Must have the Email is on checked and a valid email address in Send Email to

The screenshot shows a web application interface for managing users. At the top, there is a navigation bar with links: Home, Org Settings, Users, Tasks, Workflows, Scenarios, Testing, Issues, Training, Plans, Reports. On the right side of the navigation bar, it says 'TransIT Demo' and 'Patti Marshall Logout'. Below the navigation bar, there is a header for the current page: 'DEMO MAKE HEALTHCARE New User'. The main content area contains a form for creating a new user. The form fields are as follows:

- Organization: Demo MAKE Healthcare
- Facilities: Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co
- Username: user@demo.com
- First Name: TransIT
- Last Name: User
- Role: User (Trainer: )
- Position: Informaticist
- Employee Note: 105
- Timezone: Eastern Standard Time (EST)
- Email is on:  If you uncheck this user will not receive email for anything
- Send Email to: user@demo.com
- Contact number: 4169876541
- Text users phone:  Sends emails to users phone email as text messages
- Phones email address: 4169876541@pcs.rogers.com
- Roster status: Active

At the bottom of the form, there are 'Save' and 'Cancel' buttons. To the right of the form, there are some instructions: 'Required for automated email notifications to be sent, might not match username.' and 'Only for display on the roster if someone needs to contact the user.' Below that, it says 'Configured phone email address e.g. 416111222@pcs.rogers.com' and 'Display users current availability on the roster'.

# Send an email message when an issue is assigned

Improve turn-around time for issue resolution

- New Settings icon also enables each user to have access to turn on/off their ability to receive emails and update the email address that they wish to receive emails to
- Just click the Settings icon beside your name in the orange bar

Home Org Settings Users Tasks Workflows Scenarios Testing Issues Training Plans Reports TransIT Demo

DEMO MAKE HEALTHCARE User Roster Patti Marshall Logout

### Email Notifications

Email is on:  If you uncheck this you will not receive email for anything, not even issues

Send Email to:  Required for automated email notifications to be sent, can be different from your login.

Contact number:  Only for display on the roster if someone needs to contact you.

### Texting

Text my phone:  Sends emails to your phone as text messages



Phones email address:  Configured phone email address e.g. 416111222@pcs.rogers.com


# Send an email message when an issue is assigned

Improve turn-around time for issue resolution

- Emails come from [noreply@makesolutionsinc.com](mailto:noreply@makesolutionsinc.com) via amazones.com
  - May need to add to safe sender list to allow messages to be sent
  - Need to test with your vendors

[TransIT] Issue-148 Physician didn't default

 NoReply <noreply@makesolutionsinc.com> (NoReply via amazones.com)  
To  Patti Marshall

 We could not verify the identity of the sender. Click here to learn more.  
The actual sender of this message is different than the normal sender. Click here to learn more.

Issue 148 created by Patti Marshall

<https://prod.makesolutionsinc.com/make/Welcome.do?issue=148&orgid=1753028>

Physician didn't default

Physician didn't default



# Employee Note visible on the Roster and the Users pages 9

Particularly useful for large teams

- Changed the employee number that no one was using to be a note field
- Can be used to identify project role, or anything else you want

The screenshot shows the 'New User' form in the TransIT system. The form is titled 'DEMO MAKE HEALTHCARE New User' and is located in the 'Users' section of the application. The form includes the following fields and options:

- Organization: Demo MAKE Healthcare
- Facilities: Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co
- Username: user@demo.com
- First Name: TransIT
- Last Name: User
- Role: User
- Trainer:
- Position: Informaticist
- Employee Note: Informaticist, Emergency (highlighted with a red box)
- Timezone: Eastern Standard Time (EST)
- Email is on:  If you uncheck this user will not receive email for anything
- Send Email to: user@demo.com
- Contact number: 4169876541
- Text users phone:  Sends emails to users phone email as text messages
- Phones email address: 4169876541@pcs.rogers.com
- Roster status: Active

Buttons for 'Save' and 'Cancel' are located at the bottom of the form.

# Employee Note visible on the Roster and the Users pages

Particularly useful for large teams

- This is what it looks like on the user page

Home Org Settings Users Tasks Workflows Scenarios Testing Issues Training Plans Reports											TransIT					
Demo MAKE Healthcare → Users											DEMO MAKE HEALTHCARE Users			Patti Marshall Logout		
Upload Users New User																
Username	Facility	First Name	Last Name	Role	Position	Note	Notify Email	Phone	Last Login							
Addison@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Addison	Demo	User	Admission RN	PowerChart Analyst	addison@demo.com	(123)4567891 (1234567891@pcs.rogers.com)	15-Oct-2020 12:58							
admin@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Demo	Admin	Administrator	DBA	FirstNet Team Lead	admin@demo.com	7053546532 (7053546532@pcs.rogers.com)	30-Oct-2020 12:04							
Amy@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Amy	Red	User	Lab Tech	Lab Analyst	Amy@demo.com	(520) 588-9067	15-Oct-2020 13:00							
angela@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Angela	Demo	User	Accountant	Emergency SME	angela@makesolutionsinc.com	(705)123-4566	23-Feb-2018 09:44							
Barry@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Barry	Blue	User	Case Manager	Nursing SME	Barry@demo.com	(803) 896-0974	15-Oct-2020 13:03							
Carol@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Carol	Green	User	Physician - Ambulatory	Physician SME	Carol@demo.com	(803) 896-0974	15-Oct-2020 13:05							
copy@demo.com	Allscripts Facility, Cerner Facility	Copy	Cat	User	PAT RN	Preiop SME	cat@makesolutionsinc.com	4169997777 (4169997777@pcs.rogers.com)	15-Oct-2020 13:49							
Cory	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Cory	Copper	User		HIM Analyst	cory@demo.com									
Don@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Don	Yellow	User	PCP Office Staff	Ambulatory Analyst	Don@demo.com	6234440098	15-Oct-2020 13:50							
eam	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Erica	Maroon	User					09-Nov-2015 04:00							
Eileen@demo.com		Eileen	Black	User		Pharmacy Team Lead	Eileen@demo.com	6234440098	15-Oct-2020 14:01							
Fred@demo.com		Fred	Brown	User		Access Management Mgr	Fred@demo.com	6234440098	15-Oct-2020 13:55							
Gabi@demo.com		Gabi	Gray	User			Gabi@demo.com	6234440098								
Helen@demo.com		Helen	Pink	User			Helen@demo.com	6234440098								
Iris@demo.com		Iris	Silver	User			Iris@demo.com	2740310206								
Jack@demo.com		Jack	Gold	User			Jack@demo.com	4421199194								
newuser@demo.com		test	newuser	User			patti@makesolutionsinc.com	6234440098 (6234440098@tmomail.net)	23-Aug-2020 11:21							
Patricia	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Patricia	Brown	User												
Poppy	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Poppy	Purple	User	Admission RN											
reg@demo.com	Cerner Facility	Reggie	Registration	Student	Reg Clerk		patti@makesolutionsinc.com	4162770842	17-Sep-2020 08:40							
sample@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Sally	Sample	User	PAT RN	Lab Manager	Sally@makesolutionsinc.com	(123)456-7891 (1234567891@pcs.rogers.com)	17-Sep-2020 14:00							
tester@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Sample	Tester	Tester		HIM Analyst	angela@makesolutionsinc.com	7059848517 (7059848517@pcs.rogers.com)	25-Sep-2020 10:14							
trainer@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Tara	Trainer	Trainer	L&D RN	Instructional Designer	brian@makesolutionsinc.com	4045101605 (4045101605@tmomail.net)	18-Aug-2017 12:57							
user@demo.com	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	TransIT	User	User	Informaticist	Informaticist, Emergency	user@demo.com	4169876541 (4169876541@pcs.rogers.com)	01-Nov-2020 13:22							
Willow	Allscripts Facility, Cerner Facility, Epic Facility, Insurance Co	Willow	White	User	Admission RN											

# Employee Note visible on the Roster and the Users pages 11

Particularly useful for large teams

- This is what it looks like on the Roster Test Round page

Home Org Settings Users Tasks Workflows Scenarios Testing Issues Training Plans Reports						
Demo MAKE Healthcare > Testing > Roster				DEMO MAKE HEALTHCARE Roster Test Round		
<a href="#">View all test rounds</a>						
<b>Roster for test Integration Testing Round 2</b>						
User	Employee Note	Last active/Login	Covering	Contact nbr	Email	Status
Addison Demo	PowerChart Analyst	15-Oct-2020 12:58	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> BH RN</li> <li><input checked="" type="checkbox"/> Cath Lab RN</li> <li><input checked="" type="checkbox"/> RN</li> <li><input checked="" type="checkbox"/> PowerChart</li> </ul>	(123)4567891	addison@demo.com	Available
Amy Red	Lab Analyst	15-Oct-2020 13:00	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> PathNet</li> </ul>	(520) 588-9067	Amy@demo.com	Only available in AM
Angela Gray	TransIT Implementation Lead	4:07 pm	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> ED MD</li> <li><input checked="" type="checkbox"/> ED RN</li> <li><input checked="" type="checkbox"/> FirstNet</li> </ul>	705-888-9999	angela@makesolutionsinc.com	Testing
Barry Blue	Nursing SME	15-Oct-2020 13:03	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> PowerChart</li> </ul>	(803) 896-0974	Barry@demo.com	Available
Carol Green	Physician SME	15-Oct-2020 13:05	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> MD</li> <li><input checked="" type="checkbox"/> PowerChart</li> </ul>	(803) 896-0974	Carol@demo.com	At lunch until 2
Copy Cat	Preiop SME	15-Oct-2020 13:49	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> OR RN</li> <li><input checked="" type="checkbox"/> Perioperative Document Manager</li> <li><input checked="" type="checkbox"/> OpTime</li> </ul>	4169997777	cat@makesolutionsinc.com	Available
Demo Admin	FirstNet Team Lead	30-Oct-2020 12:04	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> ED MD</li> <li><input checked="" type="checkbox"/> ED RN</li> <li><input checked="" type="checkbox"/> FirstNet</li> <li><input checked="" type="checkbox"/> PowerChart</li> </ul>	7053546532	admin@demo.com	Demoing
Don Yellow	Ambulatory Analyst	15-Oct-2020 13:50	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Clinic Scheduler</li> </ul>	6234440098	Don@demo.com	Available
Eileen Black	Pharmacy Team Lead	15-Oct-2020 14:01	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> PharmNet</li> <li><input checked="" type="checkbox"/> Willow</li> </ul>	6234440098	Eileen@demo.com	Available
Fred Brown	Access Management Mgr	15-Oct-2020 13:55	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Radiant</li> </ul>	6234440098	Fred@demo.com	Available
Patti Marshall	MAKE Executive	7:18 pm	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Clinic Scheduler</li> <li><input checked="" type="checkbox"/> Reg Clerk</li> <li><input checked="" type="checkbox"/> ERM</li> <li><input checked="" type="checkbox"/> Access Management</li> <li><input checked="" type="checkbox"/> Cadence</li> <li><input checked="" type="checkbox"/> Prelude</li> </ul>	623-444-0098	patti@makesolutionsinc.com	Demoing
Sally Sample	Lab Manager	17-Sep-2020 14:00	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> PathNet</li> </ul>	(123)456-7891	Sally@makesolutionsinc.com	Active
Sample Tester	HIM Analyst	25-Sep-2020 10:14	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> AccessHIM</li> <li><input checked="" type="checkbox"/> Access Management</li> </ul>	7059848517	angela@makesolutionsinc.com	Available all day

# New scenario details elements

Do you have any requests?

- If there are elements that you would like added (either EHR or ERP) email [support@makesolutionsinc.com](mailto:support@makesolutionsinc.com)
- Modified [Patient Name] to be repeating to make it more useful in functional test scripts
- Added [Patient Last Name], [Patient First Name], [Patient Middle Name] as repeating elements

The screenshot shows the 'Scenario Details' page in the 'DEMO MAKE HEALTHCARE' application. The navigation bar includes 'Home', 'Org Settings', 'Users', 'Tasks', 'Workflows', 'Scenarios', 'Testing', 'Issues', 'Training', 'Plans', and 'Reports'. The page title is 'DEMO MAKE HEALTHCARE Scenario Details'. The form contains the following elements:

- Save** and **Cancel** buttons at the top.
- Scenario:** Regression - CareAdmin
- Dashboard display:** A dropdown menu.
- Facility: Add:** Cerner Facility (dropdown menu)
- Script Owner:** A text input field.
- Script Highlights: Add:** A text input field.
- Patient Name: Add:** A text input field.
- Patient Last Name: Add:** A text input field.
- Patient First Name: Add:** A text input field.
- Patient Middle Name: Add:** A text input field.
- Preferred First Name: Add:** A text input field.

# Tip of the Month

Pass it on to your entire team!

- Check to see if any of your custom tasks are missing the vendor on the outside of the task (click the Vendor link 2 times to bring them to the top)
- If the vendor isn't on the outside of the task, you can't pick the product/application on the inside of the task and both the Application and Login columns will be blank when you add the task into any scenario and again on the Test Steps page when you add the scenario to a test round

QA	Nbr	Task Name	Service	Subservice	Vendor	Updated	Description	Jump to end
↓	101112	Amb Armband print Appbar show	Medical Staff Office -	None -	None -	18/02/20	Accessing appbar to print armband	🗑 Edit Copy
↓	101113	Amb Bridging sheet show	Medical Staff Office -	None -	None -	18/02/20	Provider reviews bridging sheet with patient	🗑 Edit Copy
↓	101288	AMB - CCL Nurse; Document Vitals, other relevant details show	Cardiac Cath Lab -	None -	None -	10/05/20	Adding details to the Ambulatory Vital Signs powerform	🗑 Edit Copy
↓	101093	AMB, Clinical Connect (POwerchart) show	Medical Staff Office -	None -	None -	18/02/20	Clicking Clinical connect from menu bar	🗑 Edit Copy
↓	101276	AMB, Device Interrogation show	Medical Staff Office -	None -	None -	23/04/20		🗑 Edit Copy
↓	101278	AMB, Documentation Powerchart show	Medical Staff Office -	None -	None -	23/04/20		🗑 Edit Copy
↓	101277	AMB, Document rendering physician show	Medical Staff Office -	None -	None -	23/04/20	Manual step	🗑 Edit Copy
↓	101295	AMB Document Scanning show	None -	None -	None -	10/05/20		🗑 Edit Copy
↓	101097	AMB Existing order (Amb Organizer, Powerchart) show	Medical Staff Office -	None -	None -	14/02/20	Accessing existing Lab order attached to a patient's chart in ambulatory organiser	🗑 Edit Copy
↓	101279	AMB, Orders tab Powerchart show	Medical Staff Office -	None -	None -	23/04/20		🗑 Edit Copy
↓	101294	CCL Nurse confirms date and time of appointment with patient show	Ambulatory Clinics -	Cardiology	None -	10/05/20	CCL Nurse confirms date and time of appointment with patient and communicates appointment details to referring provider.	🗑 Edit Copy
↓	101285	CCL Nurse to HUC Or Nurse show	None -	None -	None -	10/05/20		🗑 Edit Copy
↓	101290	CCL Provider Intra-Procedure CVIS documentation show	None -	None -	None -	10/05/20		🗑 Edit Copy
↓	101291	CCL Provider Post Procedure documentation show	None -	None -	None -	11/05/20		🗑 Edit Copy
↓	101271	Change, Flip FIN to Visit ID show	None -	None -	None -	17/04/20	(Melissa Hollon) to flip Cerner from using FIN to identify the encounter to using Visit_ID_Number	🗑 Edit Copy



## Questions

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Please remember to send requests for future topics to:

[support@makesolutionsinc.com](mailto:support@makesolutionsinc.com)

