



GE Healthcare

Centricity Healthcare User Group Centricity Upgrade Best Practices

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imagination at work





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Today's discussion

Upgrade options

Preparing for CPS 11 upgrade

Post upgrade configuration
requirements/expectations

FAQs / Useful links



CPS Upgrade Options

GE Performed Upgrade

- Upgrade Coordinator
- Technical Resource
- SWAT Team Post Upgrade Support

Self upgrade



Preparing for Upgrade

Hardware

Third Party
Readiness

Documentation
& Training

5010
Readiness

Application Preparation

IT Recommendations





Hardware

- Review hardware requirements for servers AND workstations
- Consider "recommended" vs. "minimum" specifications
- Windows XP Pro is no longer supported for client workstations with CPS 11
- IE 9
- Utilize the Install Guide to configure SQL for optimal performance
- If GE completes upgrade, Are You Ready and Calculating Hardware Requirements documentation required



Going Virtual

- VMWare ESX 4.1
- Microsoft Hyper-V 2008
- Hyperthreading recommended and assumed in Calculating Hardware Requirements.xlsx
vCPU count

Citrix/TS Recommendations

Product	Minimum Version Supported
Citrix XenApp Presentation Server	6.0
Citrix ICA Client	12.1.44
Microsoft RDP Client	7.1

Virtual	CCC	Users per vCPU
Yes	Yes	8
Yes	No	10

Virtual	CCC	Users per server
No	Yes	40
No	No	50



Large Site Considerations (250+ Concurrent Users)

- Separate arrays for OS, DB, Transaction Logs, and Tempdb recommended
- Dedicated spindles required for database
- Calculating Hardware Requirements.xlsx



Documentation and Training

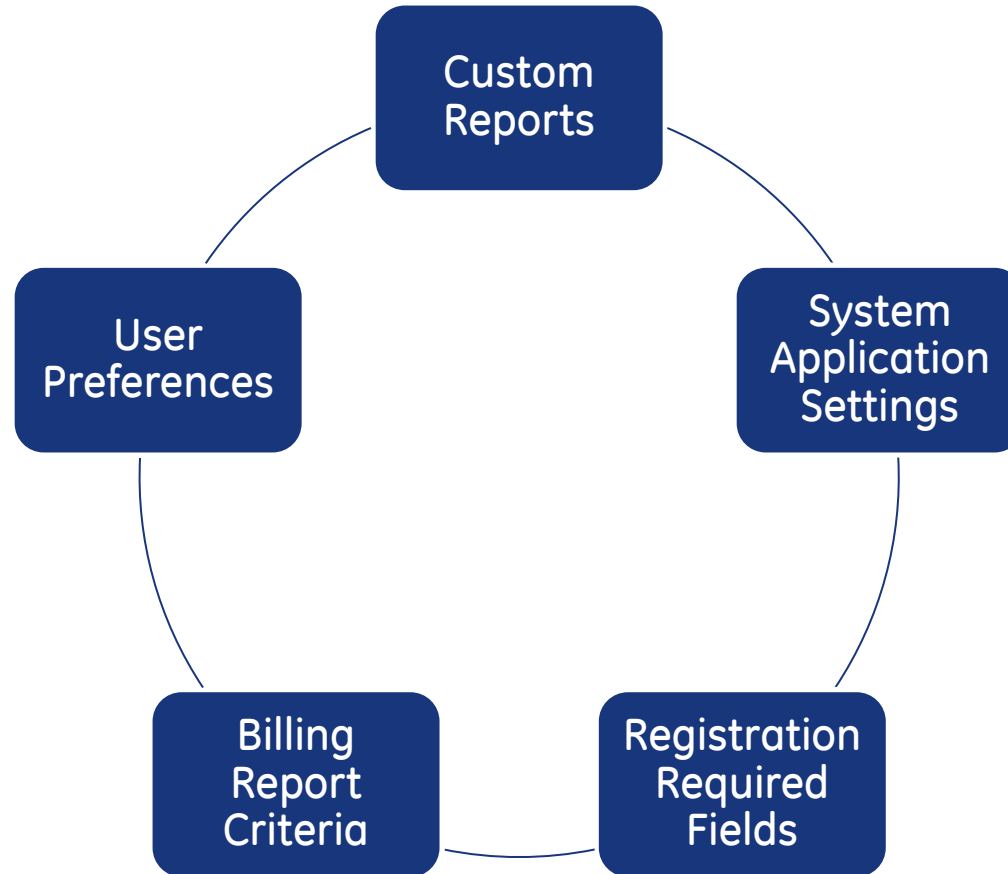


- Training Portal
- Release Notes
- What's New

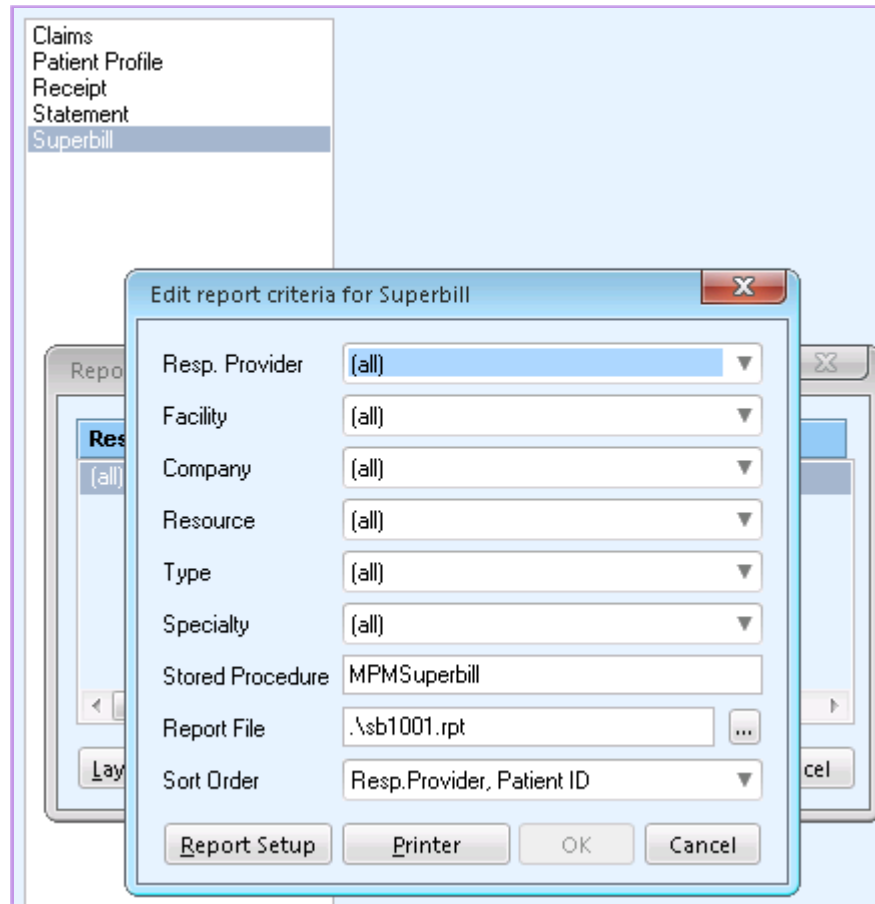
Identifying Pre-Upgrade Application Settings



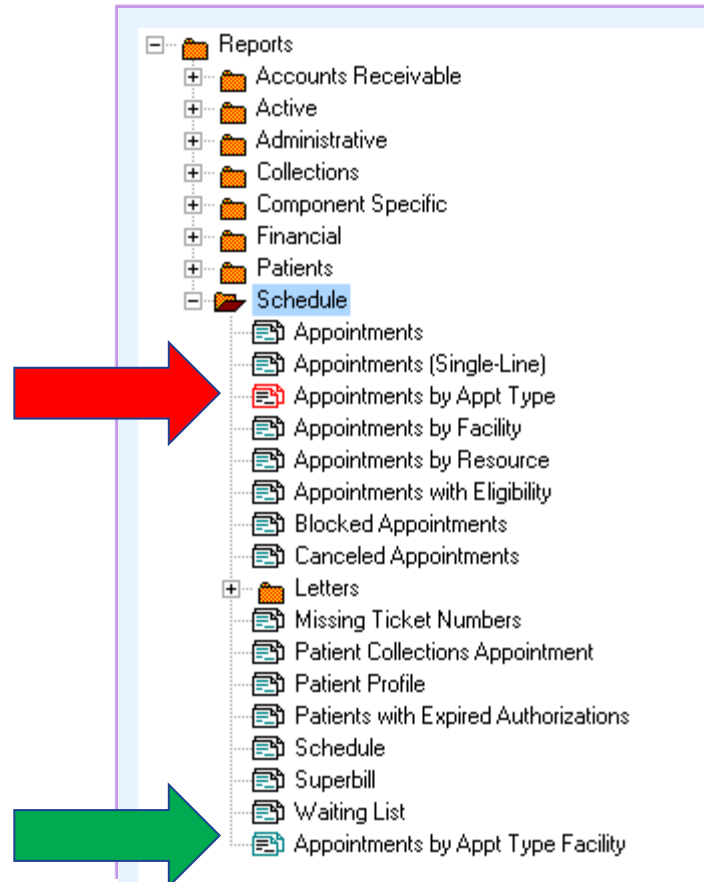
Application Preparation



Identify Administration Custom Reports & Billing Report Criteria



Identify Reports custom reports



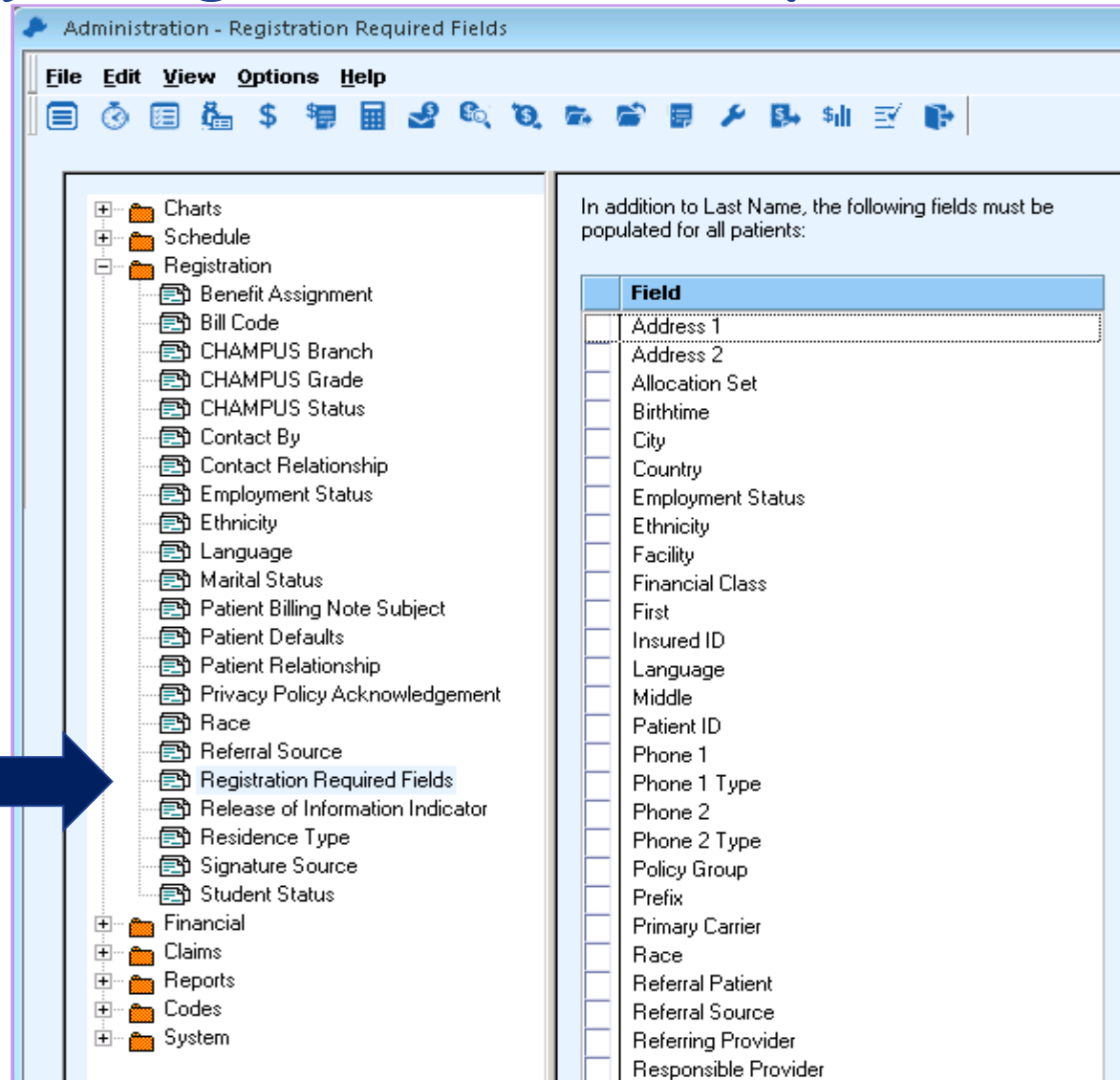
Identify Registration Required Fields

Administration - Registration Required Fields

File Edit View Options Help

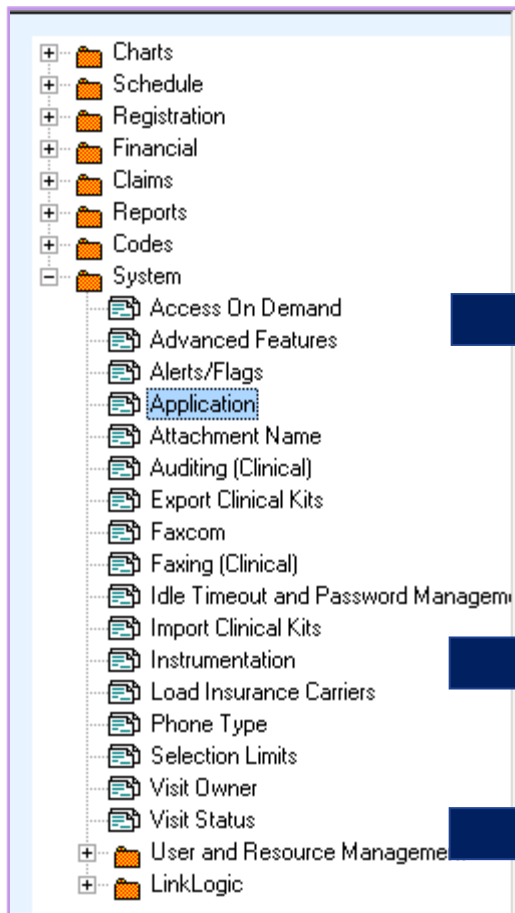
In addition to Last Name, the following fields must be populated for all patients:

Field
<input type="checkbox"/> Address 1
<input type="checkbox"/> Address 2
<input type="checkbox"/> Allocation Set
<input type="checkbox"/> Birthtime
<input type="checkbox"/> City
<input type="checkbox"/> Country
<input type="checkbox"/> Employment Status
<input type="checkbox"/> Ethnicity
<input type="checkbox"/> Facility
<input type="checkbox"/> Financial Class
<input type="checkbox"/> First
<input type="checkbox"/> Insured ID
<input type="checkbox"/> Language
<input type="checkbox"/> Middle
<input type="checkbox"/> Patient ID
<input type="checkbox"/> Phone 1
<input type="checkbox"/> Phone 1 Type
<input type="checkbox"/> Phone 2
<input type="checkbox"/> Phone 2 Type
<input type="checkbox"/> Policy Group
<input type="checkbox"/> Prefix
<input type="checkbox"/> Primary Carrier
<input type="checkbox"/> Race
<input type="checkbox"/> Referral Patient
<input type="checkbox"/> Referral Source
<input type="checkbox"/> Referring Provider
<input type="checkbox"/> Responsible Provider



The screenshot shows a software interface with a tree view on the left and a list of fields on the right. The tree view includes categories like Charts, Schedule, Registration, Financial, Claims, Reports, Codes, and System. The 'Registration' category is expanded, showing various sub-items. A blue arrow points to the 'Registration Required Fields' item. The right pane displays a list of fields with checkboxes, including Address 1, Address 2, Allocation Set, Birthtime, City, Country, Employment Status, Ethnicity, Facility, Financial Class, First, Insured ID, Language, Middle, Patient ID, Phone 1, Phone 1 Type, Phone 2, Phone 2 Type, Policy Group, Prefix, Primary Carrier, Race, Referral Patient, Referral Source, Referring Provider, and Responsible Provider.

Document Bulk Charge Import and Guarantor Based Collection Settings



Collections

Automatically move visits to collections
if patient balance is greater than and is at least days old

Automatically move visits to collections
if insurance balance is greater than and is at least days old

Automatically move visits to collections
if total balance is greater than and is at least days old

Guarantor-based collection letter
Move visits, new to Collections, to a status of

Move visits to Collections even if the guarantor has an active payment plan

Warn if accessing

A patient in collections A guarantor with an active payment plan
 A patient in bad debt A guarantor in collections

Charge Import

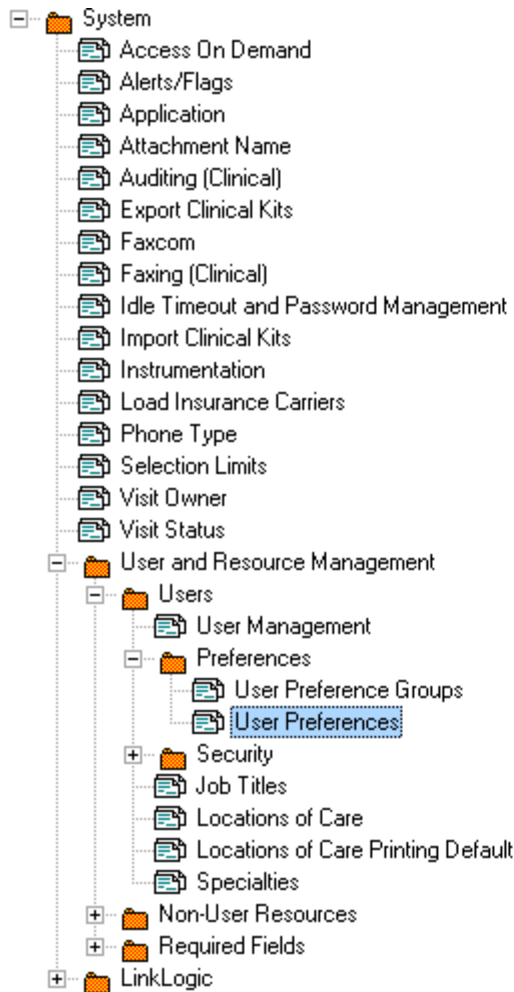
Allow bulk import for patients with open cases

Bulk Charge Import - Retrieving Additional Orders on Filed Claims

Always retrieve into same visit and set visit status to
Status Owner

Always retrieve into a new visit and set visit status to
Status Owner

Notate User Preferences



Preferences

Preferences for

User
 Group
 Enterprise

- Patient Charts
 - Custom Lists
 - Documents
 - Flowsheet
 - History View
 - Drug Interactions
 - Prescriptions
 - Order Entry
 - Orders Completion
 - Patient Banner
 - Problem List View
 - Alerts/Flags
 - Search
 - Spelling
 - Route Documents
- Desktop
 - Documents
 - Alerts/Flags
- Patient Information
 - Schedule
- Payment Entry
 - Visit Claims
- System
 - Application
 - Internet Sites

Schedule

Show canceled appointments
 Show unavailable resources
 Warn of unresolved appointments

1 Number of weeks to view in weekly view
0 Schedule refresh interval (in seconds), or 0 to turn off

Appointment Search Defaults

Days of the week and AM/PM # of results 1
Days out 1

	Sun	Mon	Tue	Wed	Thur	Fri	Sat
A.M.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P.M.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Include unallocated time slots in search
 Limits violations produce Errors and cancel the search
 Limits violations produce Warnings only and do not cancel the search

Schedule Preference

Set preferred schedule [] [...]
 No preferred schedule

[Use Defaults]

Other Pre Upgrade Considerations





Third Party Readiness

- Coordinate upgrade and readiness with all third party vendors
- CCC Version / Develop Upgrade Plans to 8.3.7.3, if necessary
- MQIC



IT Recommendations

- Good backup
- Perform upgrade under SQL “sa” account
- Rollback strategy



Everyone_CPS and Upgrades

PM04

CPS 2006, 9.x, and 9.5

CPS 10



Active Directory vs Application Security

Active Directory

- Auto Create Users
- Auto Sync AD Groups
- Less Maintenance within CPS

Application

- End Users can manage application security without IT assistance
- Password management options within application

Active Directory Security Model Requirements

Centricity Practice Solution - cps11 - CentricityPS - sa

Please select the appropriate security option for this database. If you are unsure of the appropriate choice, leave the default Application Authentication selected.

Application Active Directory

!!! WARNING !!! Ensure that Server Setup is running on the same machine where the JBoss is installed before continuing.

Domain Name
bublinfo.com

Active Directory Services Account

Specify a Domain Admin account to use when browsing users/groups and performing authentication requests. If this account is deactivated or modified, no users will be able to login.

Login Name:

Password:

Confirm Password:

< Back Exit

- AD Services Account
- Used to communicate between Application server and AD for authentication
- Domain Administrator privileges
- Must be able to enumerate AD

Adding New Users in AD Security Model

Edit User - Andersen MD, Lane R.

Basic Info Security Billing Identification Billing Fee Schedule Chart Access

Attributes

Inactive Schedule Templates
 Billable Provider Chart Access

First: Lane Middle: R. *Last: Andersen Suffix: MD

*List Name: Andersen MD, Lane R.
ID: 448
Organization:
Address 1: 120 NE Valley View Drive
Address 2:
City/State/Zip: Gresham OR 97030
Country: USA Subdivision:
Phone 1: () - []
Phone 2: (503) 665-1010 [] Work
Email:
Notes:

Identification

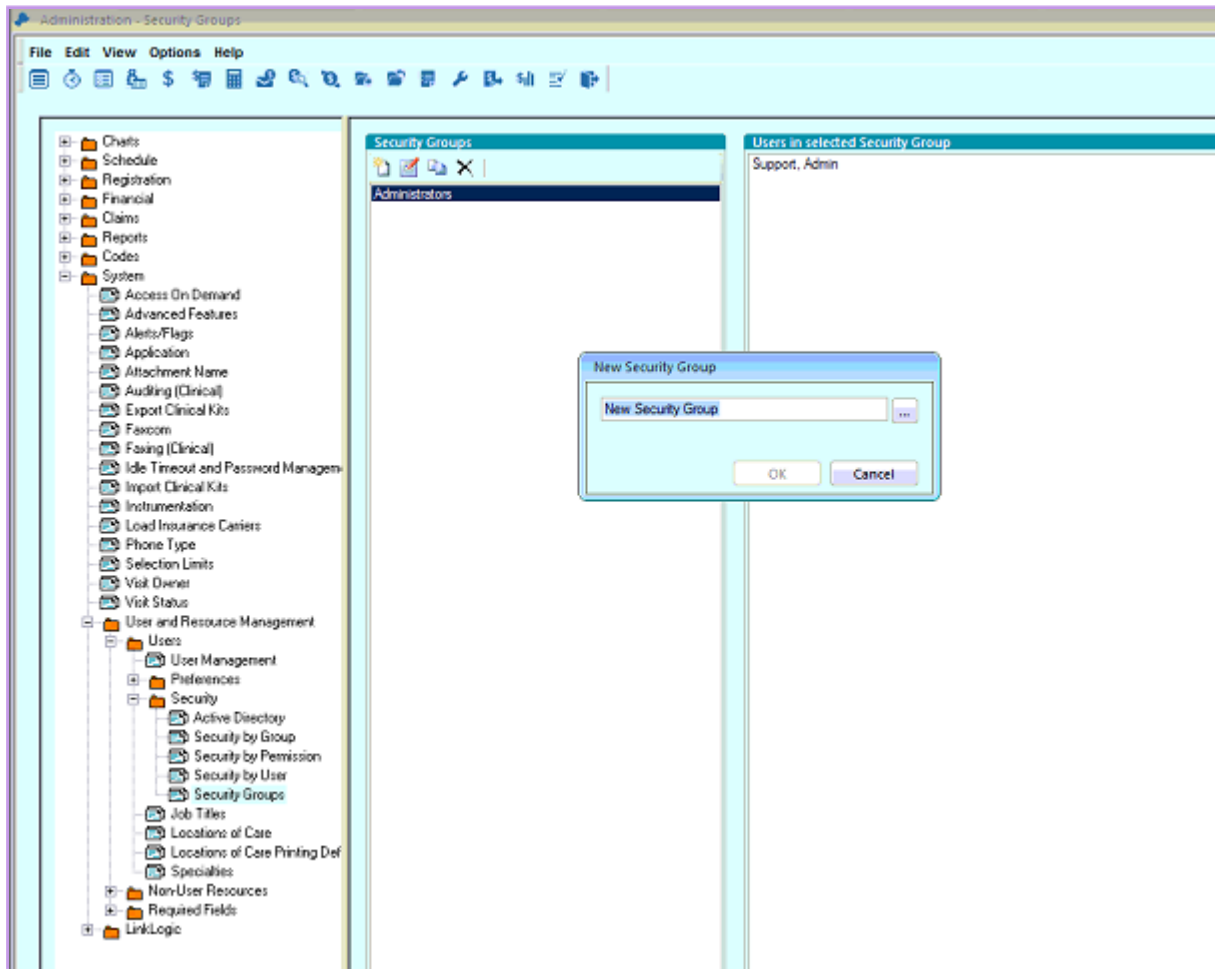
NPI:
DEA #: DE 6029651
Anesthesiologist License:
Additional License:
Specialty: Internal Medicine
Specialty License:
State License: ML3926123
UPIN #:

User Settings

*Login ID: landersen
Select a user preference group: Internal Medicine

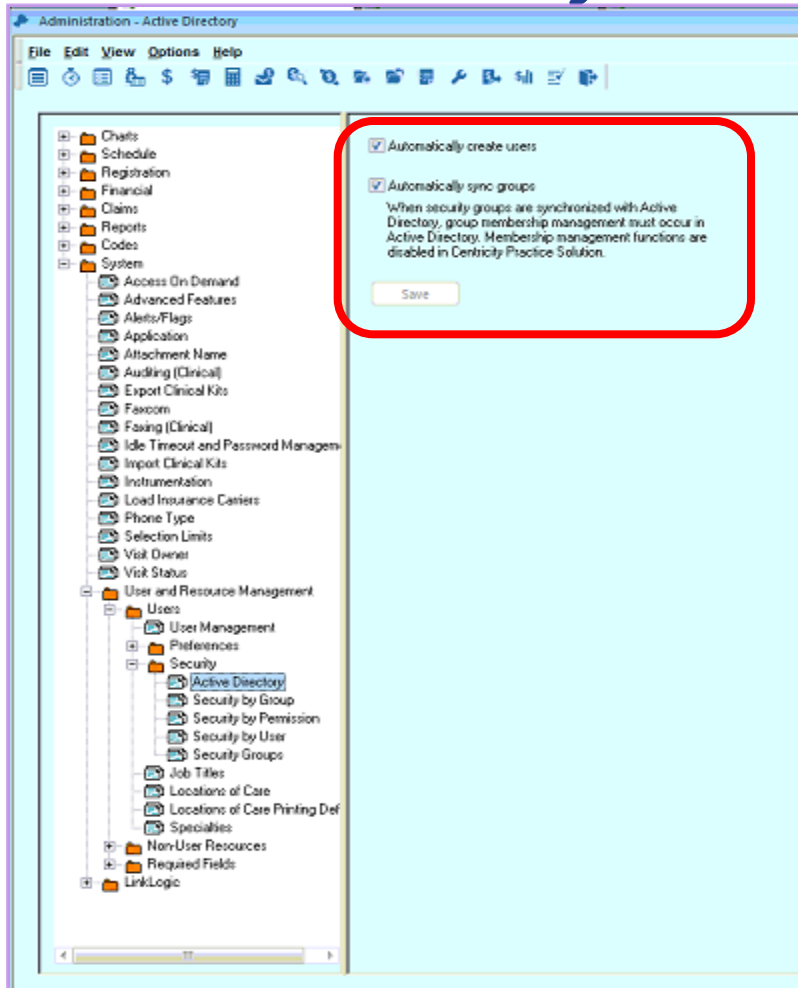
Prev Resource Next Resource OK Cancel

Adding New Groups in AD Security Model



- Can pull from AD or create new groups
- Add users to Security Groups that are not members of the AD group
- CPS does not write back to AD

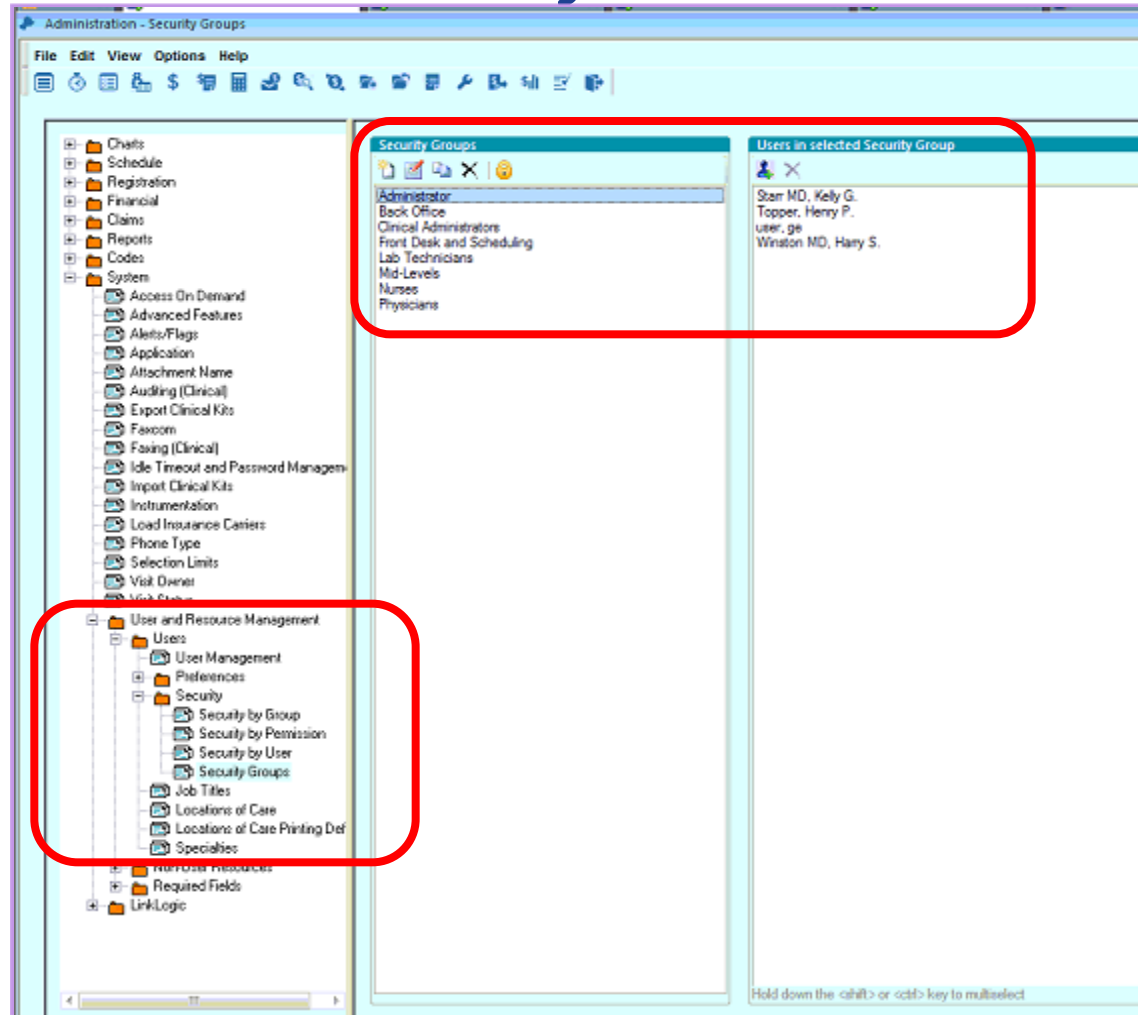
Additional AD Security Model Functionality



Auto Create Users

Auto Sync Groups

Creating Security Groups using Application Security Model



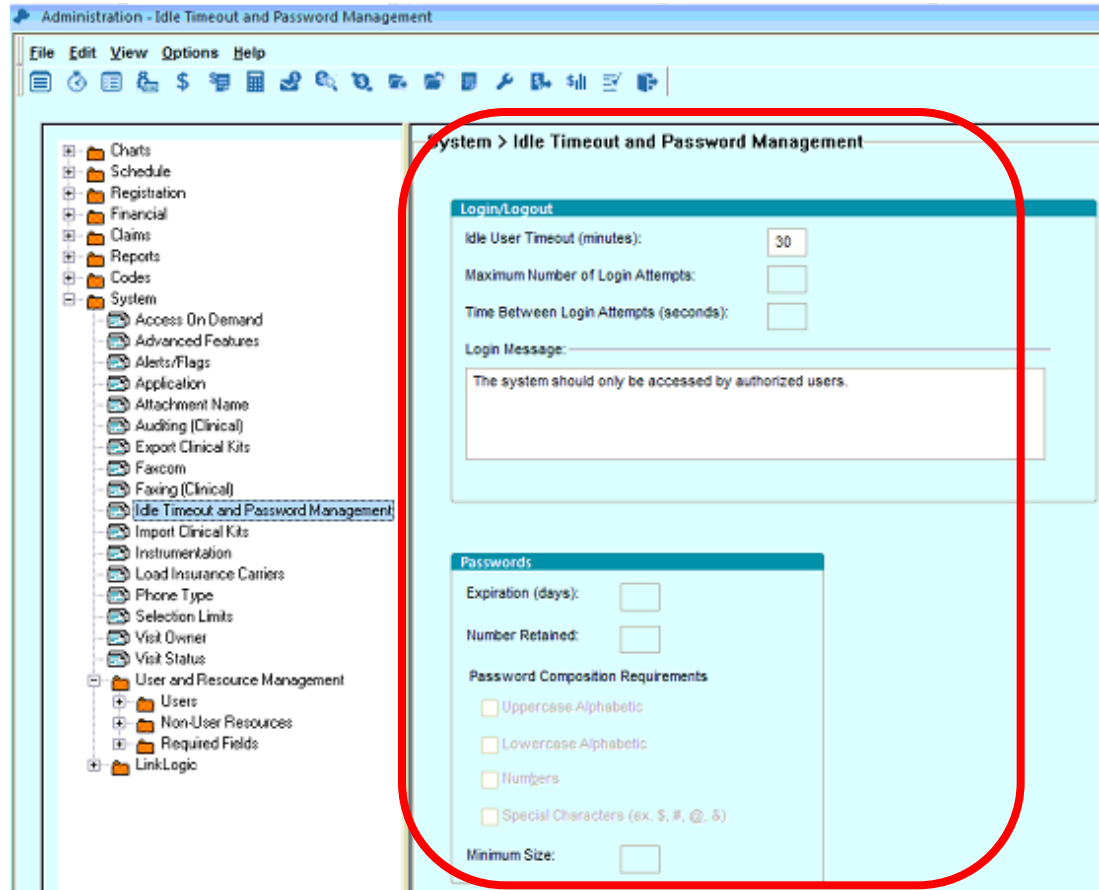
Adding Users with Application Security Model

The screenshot shows a 'New User' form with two tabs: 'Basic Info' and 'Security'. The 'Security' tab is active. The form is divided into several sections:

- Attributes:** Includes checkboxes for 'Inactive', 'Schedule Templates', 'Billable Provider', and 'Chart Access'.
- Identification:** Includes text boxes for 'NPI', 'DEA #', 'Anesthesiologist License', 'Additional License', 'Specialty License', 'State License', and 'UPIN #'. A 'Specialty' dropdown menu is set to '(none)'.
- User Settings:** (Highlighted with a red box) Includes a 'Login ID' text box, a 'Select a user preference group' dropdown menu, and a 'Lock User' button.
- Application Password Management:** Includes a checkbox for 'Force password change at next login', a 'Password' text box with a help icon, and a 'Confirm Password' text box.

Other fields in the 'Basic Info' section include 'First', 'Middle', 'Last', and 'Suffix' name boxes; 'List Name', 'ID', 'Organization', 'Address 1', 'Address 2', 'City/State/Zip', 'Country', 'Subdivision', 'Phone 1', 'Phone 2', 'Email', and 'Notes'.

Password Management Options





IT Requirements

- Internal Team Ready for Client/Plug-In Installation
- Ancillary installation considerations
- ICD 10 Diagnosis Codes for Billing
 - Review custom clinical content
 - Load appropriate codes by chapter



MIK/DTS Upgrade Process

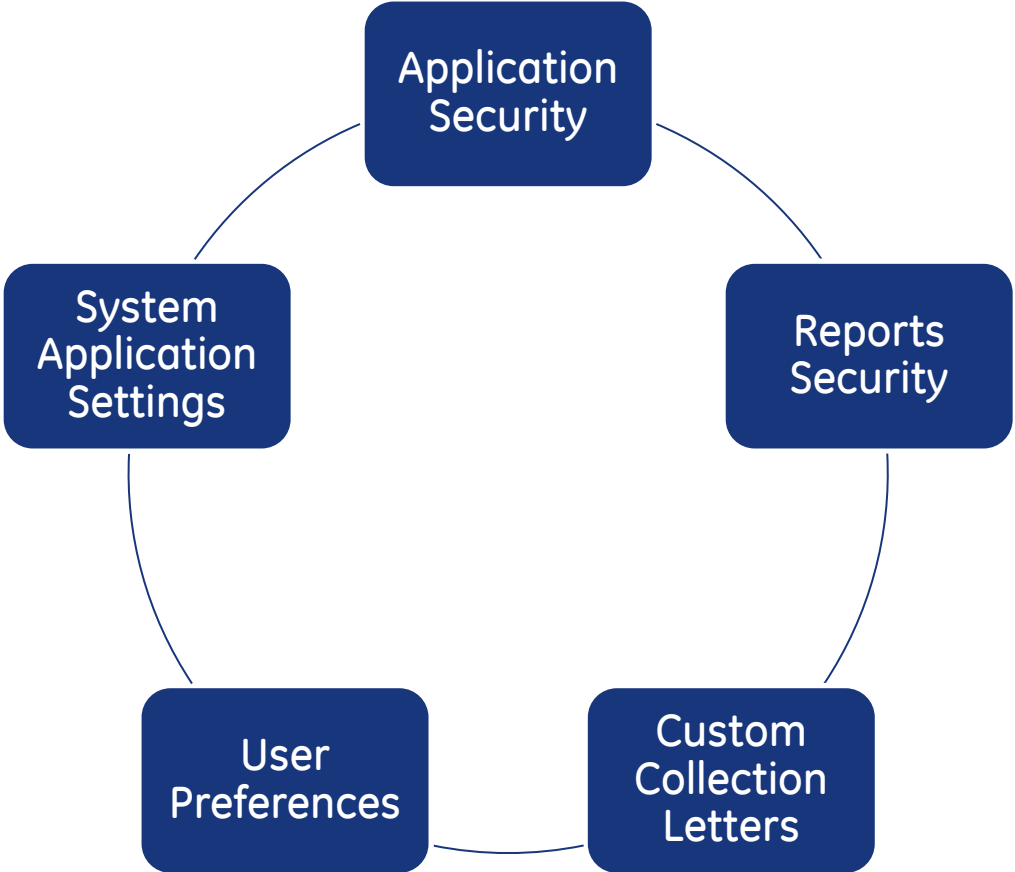
MIK

- Export Registry Files
- Update to x64 where necessary
- Import Post Upgrade
- Confirm all configurations
- Move necessary file shares

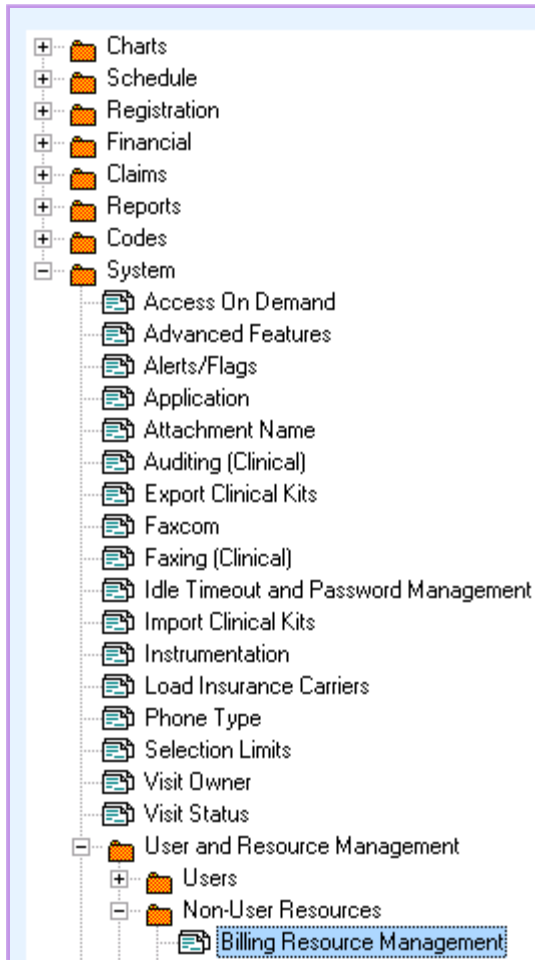
DTS

- Emr.ini
- Identify/secure Network Ilogic folder
- Llogic\standard and Ilogic\upgrade
- Options to run as service or application

Post Upgrade Application Testing



Handling Non User Billing Resources



Search for List Name containing...

Show Inactive

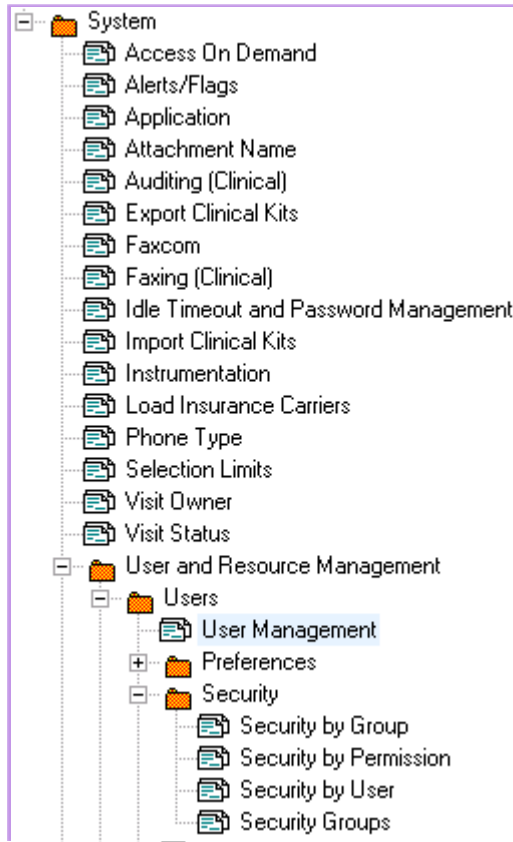
List Name	ID	Name	Org. Name	Specialty	UPIN
Bailey MD, William R	7	William Bailey	Medical Clinic, PC	General	4444
Beam MD, James S	401	James Beam			
Casey MD, Ben G	2	Ben Casey	Medical Clinic, PC	General	3690
Grey MD, Earle T	10	Earle Grey	Medical Clinics, Inc.	General	2312
Heart MD, John	9	John Heart	Medical Clinics, PC	Cardiology	Z46489
Marinelli MD, Alfred D	12	Alfred Marinelli	Anesthesia Associates	Anesthesiology	DR U...
Skinner MD, Howard L	6	Howard Skinner	Center for Aesthetic Surgery	Dermatology	UPIN
Smith, Nancy	21	Nancy Smith	Medical Clinics, P.C.	Family Practice	N/A
Truman MD, Lawrence G	8	Lawrence Truman	Truman Group Practice	Podiatry	E43215

Details for: Bailey MD, William R

Specialty: Schedule Resource Type(s):

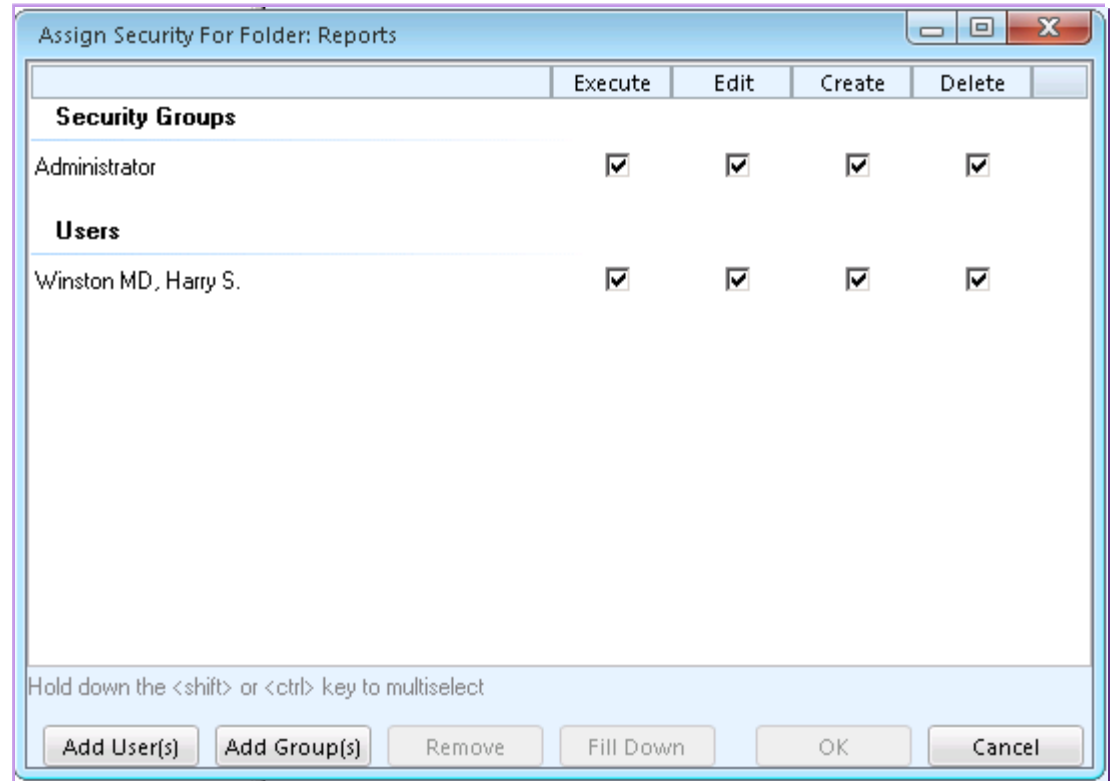
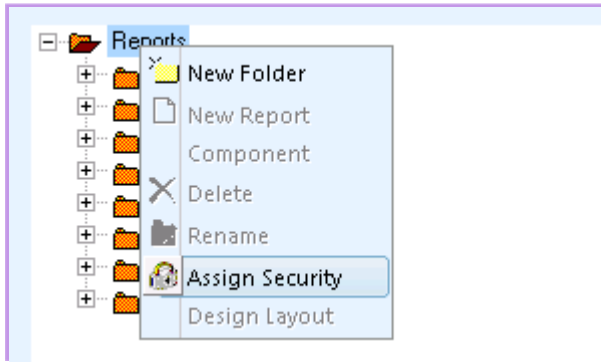
Phone:

Confirm/Configure Application Security



- Confirm users, groups, credentials, and group/user privileges
- New Functionality/Permissions

Verify/Review Report Security



Custom Collection Letters

File Edit View Options Mode Help

Reports

- Accounts Receivable
- Active
- Administrative
- Collections
 - Account Balances
 - Collection Labels
 - Guarantor Collections
 - Insurance Delinquency
 - Letters
 - Collection Letter**
 - Patient Collection Listing
 - Patient Delinquency
 - Review Letter
- Component Specific
- Financial
- Patients
- Schedule

User Interface

Controls	Name	Type
↑	STATUS	Drop List
↓	SORTBY	Drop List

Runtime

File: CollectionLetter.doc

Parameters and Formulas	Symbol	Value
-------------------------	--------	-------

Report Query

```
/* Collection Letter */  
/* There are two portions to this query. The first is to create a storedProcedure  
'rptCollectionParameters' which will be used by visit, so that what ever changes made  
to this query will be effective for the collection letter from visit component also. The
```



Post Upgrade Administration Verification/Configuration

- Bulk Charge Import/Guarantor Based Collection Settings
- User Preferences
- Registration Required Fields
- Business Reports Criteria

CPS 12 Software Requirements (Preliminary)

Client

Win 8 Pro x32 & x64

Win 7 Pro x32 & x64

IE 10 x32

IE 9 x32

App/DB Servers

Windows Server 2012 x64

Windows Server 2008 R2 x64

SQL Server 2012 SP1
Enterprise & Standard

SQL Server 2008 R2

Documentation Resources



Useful Links

Document Name	Location
CPS 11 Documentation	http://centricitypractice.gehealthcare.com/cps_11/documentation.htm
CPS 11 MU Readiness	http://centricitypractice.gehealthcare.com/mu/index.htm
CCC	http://centricitypractice.gehealthcare.com/ccc/index.htm
On-Line CPS Training Portal	http://centricityportal.gen21.com/knav/nav
Sign Up for Listserv	centricitypmservices@ge.com
ICD-10 Lookup Tool	http://apps.who.int/classifications/icd10/browse/2010/en

Thank you for joining us.

Questions



