

## KBM 8.3 Testing Checklists

The following is a list of content clients are required to check, verify, and agree upon after a test upgrade has been completed and before a Production upgrade can be scheduled. We ask that the Client Team Lead reviews, initials, and signs this checklist. We recommend that at least two (2) staff members review each item to ensure no issues are missed.

Use the tables to document any errors or missing functionality in your new KBM templates. If you are able to perform the task listed, mark the task as “Passed.” If you were unable to perform the task or received an error, mark the “Failed” column. Be sure to note any issues, missing functionality, or error messages in the comments boxes or the additional Notes/Comments fields available at the end of each table. If the function does not apply to your practice, leave the Passed/Failed columns blank and note “Not Applicable” in the comments field. Every task below must be initialed by the staff member completing the checklist.

Once complete, submit your KBM Upgrade Testing Checklist to [helpdesk@tsihealthcare.com](mailto:helpdesk@tsihealthcare.com) or 888.808.6156. Please allow a minimum of two weeks for a member of our KBM Upgrade Team to contact your staff to review the results and address any issues. Feel free to contact us if you have questions. Each practice should complete ONE (1) KBM Upgrade Conversion Test Approval Sign-Off.

Practice Name	
Practice Manager	
Client Team Lead	

List All Custom Templates Needed in Production (These will need to be exported out of Test prior to Prod Upgrade, and imported into Prod post-upgrade)

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PRODUCTION ENVIRONMENT REQUIREMENTS	
Description	Initials
Read and understand NextGen EHR version 5.8 or higher is required	
Read and understand that all maintenance jobs should be disabled for the duration of the KBM upgrade	
Reviewed TSI KBM Upgrade Information on the Route ICD-10 website	

CUSTOM TEMPLATES/DOCUMENTS	
Description	Initials
We are aware and have reviewed the list of templates that were copied and renamed to determine what customizations were originally performed and whether these customizations need to be re-preformed on the new templates.	
We are aware and have reviewed the list of often used templates in our current KBM.	
We are aware and have reviewed the list of often used documents in our current KBM.	
We are aware that any customizations performed on new KBM templates may need to be re-performed during future KBM upgrades. Work performed to recreate these customizations will be billable at then standard hourly rate.	

KBM CONFIGURATION		
Description	Comments	Initials
We have reviewed the following configurable areas of the KBM and approve of the default content or have been configured as needed (for any items that do not apply to your specialty, you may enter "n/a" in the comments column):		
- Protocols		
- Recommended Care		
- Screening Questions		
- Reason for Visit / HPI		
- Procedures		
- Office Diagnostics		



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- Review of System Defaults		
- Physical Exam Defaults		
- Other Miscellaneous Template Defaults		
- Assessments		
- My Phrases		
- Immunization Order Sets		
- Documents		
- Provider List		
- Protocol Alerts		
- Picklists		
- Required Fields		
- Practice Preferences		
- Provider MU Stage & CQM Preferences		
- Universal Preferences for Growth Charts/Graphing		

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TESTING				
Custom Templates/Documents	Passed Testing	Failed Testing	Comments	Client Initials
Custom templates function as designed (at least 10 encounters tested for all templates used)				
Custom documents generate properly (at least 10 encounters tested for all documents used)				
New data entered displays properly (at least 10 encounters tested for all templates used)				
Previously entered data displays properly (at least 10 encounters tested for all templates used)				
KBM Templates- New Data	Passed Testing	Failed Testing	Comments	Client Initials
All templates open without error (at least 10 encounters tested for all templates used)				
Can add new patients (at least 10 encounters tested for all templates used)				
Can create new encounters (at least 10 encounters tested for all templates used)				
Can add medical data (at least 10 encounters tested for all templates used)				
Can add demographic data (at least 10 encounters tested for all templates used)				
All new data displays as designed (at least 10 encounters tested for all templates used)				
All active text links function (at least 10 encounters tested for all templates used)				
All picklists function (at least 10 encounters tested)				

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for all templates used)				
All pick list values are displaying as anticipated (at least 10 encounters tested for all templates used)				
All data grids function (at least 10 encounters tested for all templates used)				
All buttons function (at least 10 encounters tested for all templates used)				
Can add demographic data and is displaying as anticipated(at least 10 encounters tested for all templates used)				
Can add medical history and displays accurately (at least 10 encounters tested for all templates used)				
Can add Social history and displays accurately (at least 10 encounters tested for all templates used)				
Can add family history and displays accurately (at least 10 encounters tested for all templates used)				
Can add new clinical problem list items and carry forward to new NextGen KBM templates (at least 10 encounters tested for all templates used)				
Can add Immunizations into Orders Module and displays accurately (at least 10 encounters tested for all templates used)				



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KBM Templates- Existing/Historical Data	Passed Testing	Failed Testing	Comments	Client Initials
All templates open without error (at least 10 encounters tested for all templates used)				
Correct version of the template opens (at least 10 encounters tested for all templates used)				
All previously entered data from old encounters displays as anticipated (at least 10 encounters tested for all templates used)				
All data grids function/populate as anticipated (at least 10 encounters tested for all templates used)				
All demographic data is displaying as anticipated (at least 10 encounters tested for all templates used)				
Medical history displays accurately (at least 10 encounters tested for all templates used)				
Social history displays accurately (at least 10 encounters tested for all templates used)				
Family history displays accurately (at least 10 encounters tested for all templates used)				
Clinical problem list displays as anticipated (at least 10 encounters tested for all templates used)				
Able to Automatically Map ICD Billing Diagnoses to SNOMED Problem List (one test for 1:1 mappings)				
Able to Manually Map ICD Billing Diagnoses to SNOMED Problem List (at least 10 patients tested)				
Immunizations display as anticipated (at least 10 encounters tested for all templates used)				

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Documents	Passed Testing	Failed Testing	Comments	Client Initials
All data is captured accurately on generated documents (at least 10 encounters tested for all templates used)				
No errors while opening documents (at least 10 encounters tested for all templates used)				
All anticipated data is being displayed (at least 10 encounters tested for all templates used)				
Workflow	Passed Testing	Failed Testing	Comments	Client Initials
Understand new KBM templates and workflow (at least 10 encounters tested for all templates used)				
Reviewed necessary workflow documentation (at least 10 encounters tested for all templates used)				
Completed an entire encounter from check-in to check-out (at least 10 encounters tested for all templates used)				
All modules are receiving data from associated templates (at least 10 encounters tested for all templates used)				
Completed all template/document customizations to accommodate practice specific workflow (at least 10 encounters tested for all templates used)				



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Prior to KBM Go Live	
Description	Client Initials
All documents should be generated for all encounters by close of business on upgrade weekend	
All items in PAQ should be signed off on by close of business on upgrade weekend	
All ICS batches should be filed by close of business on upgrade weekend	
We understand that the Document Builder executable has been changed from HighEdit format to TxText format. The TxText must be used after upgrade or documents will not be generated.	

Gap Analysis Review	
Description	Client Initials
Template Activity shown in Gap Analysis Template was reviewed and used to complete testing of most used templates	
Document Activity shown in Gap Analysis Template was reviewed and used to complete testing of most used documents	
Template Workflow Analysis Activity shown in Gap Analysis Template was reviewed and used to complete testing of most used workflows	
Template Pop Up to Parent Template Relationship Activity shown in Gap Analysis Template was reviewed and used to complete testing of most used pop up templates	
List of Templates with Fields Not Part of Any KBM Section shown in Gap Analysis Template was reviewed and used to complete testing of new KBM 8.3 templates and compare functionality to current KBM version templates	



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**Additional Notes/Comments for KBM Testing/Gap Analysis:**