Medications 2.0 Transition Checklist

If your agency is live/operational with AlayaCare you can migrate to Medications 2.0, please see the **Medications 2.0 Transition Guide** for full information on the transition process.

Below is a **checklist of steps** you should **complete** during your transition:

Checklist

Transition Steps

- ❑ Familiarize Yourself with Medications 2.0
  - o Understand the main **differences between Medications 1.0 and 2.0** by reviewing the comparison document linked at the bottom of this ZD article.
  - o Watch **Meds 2.0 Training Videos** in ACU Certifications
  - o Review the **Medications 2.0 resources on Zendesk**

- ❑ *(If Required)* Approve all forms with Advanced Form Components in UAT
  - o Any form submissions containing Meds 1.0 advanced components should all be approved before the transition from Meds 1.0 to Meds 2.0 begins.

- ❑ Submit a Zendesk ticket to activate Medications 2.0 in UAT
  - o Choose **Transition Request|Meds 2.0** from the issue selection dropdown

- ❑ Set Up, Validate, Correct and Test in your UAT environment
  - o <u>Part 1</u>: Set Up Medical System Settings and ACL's
    - ▪ Make sure to do this before anyone starts navigating into client medication profiles
  - o <u>Part 2</u>: Validate that the Medications 2.0 Data Transferred Correctly
    - ▪ Ensure there are no incorrect fields
  - o <u>Part 3</u>: Make Required Corrections as Needed
    - ▪ Copy and make corrections, discontinue incorrect version

  - o <u>Part 4</u>: Test Your End-to-End Medications 2.0 Workflows

- o <u>Part 5:</u> *(Only If Required)* Update All Forms That Use Advanced Form Components
  - ▪ Create a new version of the form, remove the Meds 1.0 component from the form, add in the new Meds 2.0 component to the form, and publish

❑ Communicate the Transition Plan with your Agency
- o Suggestions include:
  - ▪ Email communications with your training resources
  - ▪ Training sessions (if required)

❑ *(If Required)* Approve all forms with Advanced Form Components in Staging
- o Any form submissions containing Meds 1.0 advanced components should all be approved before the transition from Meds 1.0 to Meds 2.0 begins.

❑ Submit a <u>Zendesk ticket</u> to activate Medications 2.0 in Staging
- o Choose **Transition Request|Meds 2.0** from the issue selection dropdown
- o Request must be received by **Monday 5PM EST** for the data to be activated in your Staging environment **Thursday 7AM EST** of that same week.

❑ Set Up, Validate, Correct, and Test in your Staging environment
- o <u>Part 1</u>: Set Up <u>Medical System Settings</u> and ACL's
  - ▪ Make sure to do this before anyone starts navigating into client medication profiles
- o <u>Part 2</u>: Validate that the Medications 2.0 Data Transferred Correctly
  - ▪ Ensure there are no incorrect fields

- o <u>Part 3:</u> Make Required Corrections as Needed
- o <u>Part 4:</u> Test Your End-to-End Medications 2.0 Workflows
- o <u>Part 5:</u> *(Only If Required)* Update All Forms That Use Advanced Form Components
  - ▪ Create a new version of the form, remove the Meds 1.0 component from the form, add in the new Meds 2.0 component to the form, and publish

❑ *If Required:* Let Support Agent know more time is needed to test in Staging
- o Remember, it only lasts until midnight and then will revert to a Staging environment without Meds2.0

- ❑ *(If Required)* Approve all forms with Advanced Form Components in Production
  - o Any form submissions containing Meds 1.0 advanced components should all be approved before the transition from Meds 1.0 to Meds 2.0 begins.

- ❑ **Submit a Zendesk ticket to activate Medications 2.0 in your** Production **environment**
  - o Choose **Transition Request|Meds 2.0** from the issue selection dropdown
  - o Select the date you would like to have Medications 2.0 turned on (provide at least **3 business days**)

- ❑ Set Up, Validate, Correct, and Test in your Production environment
  - o <u>Part 1</u>: Set Up <u>Medical System Settings</u> and ACL's
    - ▪ Make sure to do this before anyone starts navigating into client medication profiles
  - o <u>Part 2</u>: Validate that the Medications 2.0 Data Transferred Correctly
    - ▪ Ensure there are no incorrect fields
  - o <u>Part 3:</u> Make Required Corrections as Needed
  - o <u>Part 4:</u> Test Your End-to-End Medications 2.0 Workflows
  - o <u>Part 5:</u> *(Only If Required)* Update All Forms That Use Advanced Form Components
    - ▪ Create a new version of the form, remove the Meds 1.0 component from the form, add in the new Meds 2.0 component to the form, and publish

- ❑ Start using Medications 2.0 in your Production environment!