10.3 Upgrade Customer Readiness Guide

Purpose

This guide outlines the courseware and WebEx® recordings available to support the Horizon Clinicals® 10.3 upgrade. Please complete the relevant courseware and recordings prior to your upgrade.

Note: You can find the current version of this document on the McKesson Provider Technologies Product Training Portal. From the My Training page, look under Important Links at the lower right.

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How to access the courseware

With Release 10.3, you no longer have to order a 10.3 upgrades training CD. You can access the 10.3 courseware directly from the McKesson Provider Technologies Product Training Portal.

1. Send an e-mail to education.solutions@mckesson.com requesting access to the Upgrades Release 10.3 Program. Include your hospital, enterprise or customer number, contract number, and your 10.1 or 10.3 upgrade start date.

2. Once you are enrolled in the Upgrades Release 10.3 Program you will be notified by email and can log in to the McKesson Provider Technologies Product Training Portal. You will have access to the program for one year from enrollment date.

3. Under Upgrades Release 10.3 Program Components, in the middle of the page, select training by product area from the list of 10.3 Upgrade Education Assets.
4. Click on the first link within the Upgrade Release 10.3 Program Components titled “Common Application Framework”

5. Upon clicking the link, you will be shown the screen below where you will be able to launch the first course. This will repeat for all program components.

Horizon Clinicals 10.3 courseware

This section outlines the courseware available to support the 10.3 upgrade by product area. There are six types of Horizon Clinicals 10.3 courseware:

- **Application Overview** – Provides the learner with a high level overview of the product.
- **Bridge Document** – Supplements the web-based training and is intended for users already familiar with the application functionality. Focuses on the enhancements to 10.3.
- **Job Aid** – Step-by-step instructions for common application tasks.
- **WBT** – Web-based training.

The Horizon Clinicals 10.3 courseware is grouped as follows:

**Common Application Framework**
- CAF700H – Common Application Framework – Bridge Document (10.1–10.3)

**Horizon Expert Documentation Configuration Tool**
- HCT700H – Horizon Expert Documentation Configuration Tool – Bridge Document (10.3)

**Horizon Infrastructure Configuration Tool**
- HIC100H – Horizon Infrastructure Configuration Tool – Self-Study Guide (10.3)
Translation Manager
- TMR200A – Translation Manager Overview (1.1)
- TMR200H – Translation Manager Job Aid (1.1)

Horizon Health Summary™
- HHS100A – Horizon Health Summary – Application Overview (10.3)
- HHS700H – Horizon Health Summary – Application Bridge Document (10.1–10.3)
- HHS705H – Horizon Health Summary – Job Aids
- HHS920E – Horizon Health Summary – Immunizations (10.3)

Horizon Perinatal Care™
- HPC100A – Horizon Perinatal Care – Application Overview for Surveillance and Archival (3.14)
- HPC101A – Horizon Perinatal Care – Application Overview for Workflow Management (10.3)
- HPC105A – Horizon Perinatal Care – Surveillance and Archival Administrative Overview (3.14)
- HPC700H – Horizon Perinatal Care – Application Bridge Document – (10.1–10.3)

Horizon Expert Documentation™
- HED400H – Horizon Expert Documentation Reports Quick Reference Guide
- HED705H – Horizon Expert Documentation – Application Bridge Document (10.1–10.3)

Horizon Admin-Rx™
- MED105A – Horizon Admin-Rx – Application Overview
- MED400H – Horizon Admin-Rx Reports Quick Reference Guide
- MED700H – Horizon Admin-Rx – Application Bridge Document (10.1–10.3)
- MED705H – Horizon Admin-Rx – Build Bridge Document (10.1–10.3)

Care Organizer
- ORG100A – Care Organizer – Application Overview
- ORG705H – Care Organizer – Application Bridge Document (10.1–10.3)
- ORG710H – Care Organizer – Build Configuration Bridge Document (10.1–10.3)

Horizon Care Alerts™
- HCA700H – Horizon Care Alerts Bridge Document

Horizon Emergency Care™
- HEC170A – Horizon Emergency Care Physician Upgrade Training (10.3)
- HEC400H – Horizon Emergency Care Reports Quick Reference Guide
- HEC700H – Horizon Emergency Care Application Bridge Document (10.1–10.3)

Horizon Expert Orders™
- HEO400H – Horizon Expert Orders Reports Quick Reference Guide
- HEO700H – Horizon Expert Orders Application Bridge Document (10.1–10.3)

Horizon Order Management™
- HOM700H – Horizon Orders Management Application Bridge Document (10.1–10.3)

Horizon Expert Notes™
- HEN700H – Horizon Expert Notes Application Bridge Document (10.1–10.3)

HorizonWP Physician Portal
- HPP100A – HorizonWP Physician Portal Application Overview (13.1)

Document Manager
- REP100H – Document Manager – Student Handbook (10.3)
How to access the WebEx recordings

Note: The WebEx Player is required to view the recordings. See “How to download the WebEx Player” beginning on page 5.

1. Log in to the McKesson Customer Portal.
2. Click the Education and Training tab.
3. Under Webinar Archive, click the View All link.
4. Under Articles, click the recording you would like to view.
5. Click the blue link under the description to start the recording. Note: If a message appears, click OK to continue.

Horizon Clinicals 10.1 WebEx recordings

For additional training on 10.1 see the 10.1 Upgrade Customer Readiness Guide available on the McKesson Provide Technologies Product Training Portal. From the My Training page, look under Important Links at the lower right.

Horizon Clinicals 10.3 WebEx recordings

This section lists the 10.3 recordings applicable for the 10.3 upgrade.

Horizon Expert Documentation and Care Organizer

- Release 10.3: Care Organizer Overview (22 min) This presentation is an overview of the enhancements to Care Organizer in the ER10.3 release. The review will assist in understanding the changes and help customers determine what end-user training may be needed at their facility.
- Release 10.3: HED upgrade in-scope enhancements (5 min) ER10.3 Horizon Expert Documentation upgrade in-scope enhancements. The recording includes column display; modify/inactivate another’s charting, and LConfig webforms.

Horizon Expert Orders

- Release 10.3: HEO Time Offset and Consecutive Orders (16 min) This presentation describes the enhancement to Horizon Expert Orders Order Outlines. Horizon Expert Orders now provides the ability to predefine order groups (outlines) that have a time relationship to each other. This can be used to configure test preps or protocols where orders need to be done in a particular order or at a certain time before or after a procedure.
- Release 10.3: HEO lab mapping process (25 min) This presentation is an overview of the Horizon Expert Orders Lab Mapping Process at 10.3. This presentation reviews: Horizon Expert Orders Lab Mapping Steps; Building new Horizon Expert Orders Lab Concepts; Mapping Lab Label Seq’s; Units of Measure Conversion; Lab Results Decision Support Build; Dispositioning Lab Label Seq’s; and Lab Result Alerts in Horizon Expert Orders.

Admin-Rx

- Release 10.3: Horizon Admin-Rx allergy screening and MAAR enhancements (27 min) Provides an overview of 10.3 allergy screening and Medication Administration Associated Results (MAAR) enhancements.
• **Release 10.3: Horizon Admin-Rx schedule select and recently given warning enhancements** (15 min) Provides an overview of 10.3 Schedule Select and Nurse Schedule Comments and Admin-Rx Recently Given Warning enhancements.

• **Release 10.3: Horizon Admin-Rx infusion and dose precision enhancements** (27 min) Provides an overview of 10.3 Infusion and Dose Precision enhancements.

• **Release 10.3: Admin-Rx and IV Manage Labels** (10 min) This recording provides an overview of the ER10.3 enhancements that support rate and dose displayed in IV Med Drips class and modify IV results in Horizon Expert Documentation CRv result detail. The recording includes discussion about HED_IV_INTAKE_CHART and DOSE_PREC_NEW.

**Horizon Emergency Care and Patient Tracking Board**

• **Release 10.3: EDTB Count Functional Training** (7 min). Overview of the Patient Tracking Board enhancement for patient counts and filters.

• **Release 10.3: EDTB Medication Order Notification Enhancement** (3 min). Overview of the Patient Tracking Board enhancement for Medication Order Notification.

• **Release 10.3: HEC Client device setup** (3 min) Reviews prerequisites for 10.3 clients with Horizon Emergency Care.

• **Release 10.3: HEC Disabling longitudinal data access** (3 min) Reviews the option and setup to disable entering longitudinal data (entering home medications and allergies) on Quick Admit records to help prevent duplicate home medication and allergy entries.

• **Release 10.3: HEC Order Management View enhancements** (4 min) Provides a way for the customer to control the display of data on the Manage Orders tab.

• **Release 10.3: HEC NIH Stroke Score re-write** (2 min) Reviews changes made to the view of NIH Stroke Score application.

• **Release 10.3: HEC Printing and faxing** (7 min) Reviews the new Print/Fax dialog box, preserved workflow, and other print/fax features.

• **Release 10.3: HEC Setting up printing/faxing with HEC Config Tool** (10 min) Reviews the printing architecture, database design, functionality, and setup.

• **Release 10.3: HEC Staff Legend Credentials on the Chartview Reports** (2 min) Reviews the addition of the staff legend/credentials to the chart view and printed chart view PDF reports.

**Horizon Care Alerts**

• **Release 10.3: HCA Enhancements** (14 min) This recording covers the new enhancements for Horizon Care Alerts at Release 10.3.

**HorizonWP Physician Portal**

• **HPP 13.1 Foundation Enhancements** (6 min) This recording includes the Foundation Enhancements included in HorizonWP Physician Portal 13.1.

• **HPP 13.0 Portlets Enhancements** (26 min) This session reviews the enhancements for HorizonWP Physician Portal 13.0 Horizon Infrastructure portlets.

**How to download the WebEx Player**

The WebEx Player is required to view the recordings. You must have administrator rights on your computer to install the WebEx Player.

If you have problems with the installation, contact WebEx Support at 866-229-3239 or your IT support team for assistance.

Follow these steps to download the WebEx Player:

2. Scroll to the bottom of the page. Under CHANNELS, click **Get the WebEx player**.

3. On the right side of the page, click Download the .WRF player (for Windows)

4. **Important!** When the Download WebEx Player window opens, do **not** click the **Download Now** button.

   A yellow Information Bar appears above the **Download Now** button. Right-click the Information Bar and click **Download File**.

5. Click **Run**.

6. Click **Run**.

7. Click **Next**.

8. Check “I accept the terms in the license agreement” and Click **Next**.

9. Select **Complete** and then click **Next**.

10. Click **Next**.

11. Click **Install**.

12. Click **Finish**.

13. Close the WebEx Download window.

Troubleshooting

If the .WRF file does not run, this means it has somehow become associated with the wrong file type such as Microsoft® Works or Word. Here are the steps to fix this problem:

1. Download the .WRF file to the Desktop.
2. Right-click the .WRF file and select **Open With**.
3. If **AtAuthor** is in the list of Programs:
   a. Click **AtAuthor** and select **Always use the selected program to open this kind of file**.
   b. Click **OK**.
4. If **AtAuthor** is not in the list of Programs:
   a. Click the **Browse** button and go to `c:\Program Files\WebEx\Record Playback`.
   b. Select **AtAuthor.exe** and click **Open**.
   c. Select **Always use the selected program to open this kind of file**.
   d. Click **OK**.

Now the .WRF file should play and any other .WRF files should automatically play without having to download and re-associate with WebEx Player.

Frequently asked questions

Who should I contact if I encounter problems accessing the courseware, documentation, or the recordings?

Send an e-mail message to education.solutions@mckesson.com describing your issue. Include your customer number, the course title or recording name and your contact information.

Where do I access the courseware and recordings?

You can access the courseware listed in the section “Horizon Clinicals 10.3 courseware” through the **McKesson Provider Technologies Product Training Portal**. You can access the recordings listed in the section “Horizon Clinicals 10.3 WebEx recordings” through the **Customer Portal** on the **Education and Training** page. See detailed instructions in the section “How to access the courseware” and “How to access the WebEx recordings.”

Are there any course prerequisites?

Yes, some courses do require you to complete prerequisites prior to launching the course. Please review the course descriptions on the **McKesson Provider Technologies Product Training Portal** to better understand the requirements.

The 10.3 upgrade courseware and recordings assume prior product knowledge gained from previous releases of the software. If you require additional product training, please contact education.solutions@mckesson.com.

I launched the course but it doesn’t display. What can I do?

First, check to see if pop-ups are blocked. If they are blocked, allow them. Second, check is to see if a secondary window opened. Some courses have multiple links or windows. If you still can’t view the courseware, contact Education.TechSupport@mckesson.com.
By what date do I have to view the recordings?
Please view all recordings before the kick-off call. As you watch the recordings, document any questions and send them to your assigned project manager; he or she will assign them to the appropriate resources, who will contact you.

What recordings should I start with?
This depends on the site and products you are upgrading. See the Horizon Clinicals 10.1 and 10.3 WebEx recordings lists in this document. The recordings are grouped by product and then by release. Contact your project manager if you have any further questions about the recordings necessary for your site.

If you are a 10.3 upgrade, please view both 10.1 and 10.3 recordings. This will best prepare your team.

Who do I go to with questions?
If you have questions regarding the recordings, contact your McKesson project manager, implementation consultant, and/or the Enterprise Account Executive assigned to your hospital. She or he will contact the appropriate resources to get the answers or training you need. Your assigned project implementation consultant will also be in touch with you to track your progress and answer any remaining questions.