

## Workflow Limitations during Transparent System Lockdown

# Tip Sheet

NHRMC will be using the transparent process to install service updates to our Epic software. During the "transparent system lockdown" period before the system downtime, you'll notice that you can't make changes that customize certain aspects of your workflows. This is because the transparent process is updating related data behind the scenes while you continue to use the system.

**The transparent lockdown period will be from Monday, June 14<sup>th</sup> at 12:00 pm until the completion of the installation which is expected to be by 2:00 am Thursday, June 17<sup>th</sup>.**

## Temporarily Unavailable Customization Options

There are some common workflow customization options that are temporarily unavailable during the lockdown.

### Creating or editing filters in Chart Review

An error message appears when you try to create a new filter in Chart Review or try to edit a filter that is already used in Chart Review.

**What to do:** If you see an error message when attempting to add or edit a filter, close the error message and continue your workflow. The changes that you made before the error message appeared aren't applied to Chart Review. Use Chart Review as it is currently set up and make any needed changes after June 17<sup>th</sup>.

### Applying filters in work lists

An error message appears when you try to add a new filter to one of your workqueues or try to edit a filter that is already used on a workqueue.

The following workqueues are affected:

- Status Report
- Study Search Report
- Result Tracker Work List
- Technologist Work List
- Technologist Schedule Orders Work List

**What to do:** If you see an error message when attempting to add or edit a filter, close the error message and continue your workflow. The changes that you made before the error message appeared aren't applied to your workqueue. Use your workqueues as they're currently set up and make any needed changes after June 17<sup>th</sup>.

### Customizing advanced settings for Charge Router Reconciliation and Routed Charges reports

During the lockdown, the Advanced tab doesn't appear when you create or edit a Charge Router Reconciliation or Routed Charges report.

**What to do:** Wait until after June 17<sup>th</sup> to customize these settings.

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### Creating or editing SmartLinks

During the lockdown, you won't be able to create new SmartLinks or edit your existing ones.

\*\*SmartPhrases are no longer affected and **can** be updated during the lockdown\*\*

**What to do:** Type the text that you want to appear instead.

### Personalizing dashboards

After you click the gear icon and update settings or edit the components of a Radar dashboard, an error message appears when you click Accept.

**What to do:** Close the error message and continue working in Hyperspace. You won't be able to make your changes until after June 17<sup>th</sup>.

### Creating, Editing, and Sharing NoteWriter Macros

If you attempt to create a macro or save changes to a macro during the lockdown, an error message appears.

Additionally, the Owners/Users tab in the SmartBlock Macro Editor is read-only during the lockdown, so you can't add owners or users for the macro.

**What to do:** Wait to make your changes, create macros, or share macros until after June 17<sup>th</sup>.

### Creating or editing QuickActions

When you create or edit a QuickAction in In Basket, an error message appears indicating that the QuickAction is locked. Note that there are two different error messages that can appear.

**What to do:** Wait until after June 17<sup>th</sup> to create a new QuickAction. Continue to complete the action as you did previously. If you need to edit a QuickAction before using it again, you might need to complete the action without using the QuickAction until after June 17<sup>th</sup>.

### Provider System Lists

Analysts are unable to create new System Lists for Providers onboarded during a System Lockdown.

**What to do:** Create provider system lists prior to Lockdown when possible. Wait until June 17<sup>th</sup> to create the new system list for providers.

### Saving SlicerDicer Sessions

When you save a SlicerDicer population or session, an error message appears when you click Save Session, and the session isn't saved.

**What to do:** Continue working in SlicerDicer but be aware that you can't save your work until after June 17<sup>th</sup>.

**If you have questions, please contact [Vera.Whitehurst@nhrmc.org](mailto:Vera.Whitehurst@nhrmc.org).**