

## Workflow Limitations During the Upgrade Lockdown

Northwestern Medicine is using the background upgrade process to upgrade to the February 2020 version of Epic. During the "Upgrade 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 background process is updating related data behind the scenes while you continue to use the system.

For Northwestern Medicine, the upgrade lockdown period will last between Thursday, September 9<sup>th</sup> at 4:00 PM through Sunday, September 13<sup>th</sup> at 2:30 AM.

## 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 the upgrade.

### 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:

- Protocol Work List
- Reading Work List
- Signing Work List
- 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 the upgrade.

## 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 the upgrade to customize these settings.

## Creating or editing SmartPhrases and SmartLinks

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

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

## Personalizing dashboards

After you click  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 the upgrade.

## 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 the upgrade.

## 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 the upgrade 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 the upgrade.

## 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 the upgrade.

## If you have questions

If you have questions or encounter any issues completing a workflow during the lockdown, contact the Service Desk.