



# **DeliverHealth**

## **InCommand**

### **Updates to Workflow Validation**

#### **Rules:**

#### **Logging, Copying, and Reporting**

#### **Release Notes**

## What's new?

DeliverHealth is pleased to announce several enhancements to Workflow validation rules, including the ability to copy MT rules to Workflow rules and vice-versa, new logging for validation overrides, and updates to validation rule reporting.

### Copying MT Validation Rules to Workflow Validation Rules

To help set up Workflow validation rules, a new option called '**Copy <name of rule> to Workflow Validation Rule**' has been added above the 'Load System Defaults' button. This option copies an MT rule and adds it to the list of Workflow rules. Workflow rules can also be copied and added to MT rules using the new '**Copy <name of rule> to MT Validation Rule**' option.

This feature is available to anyone with access to the Workflow validation rules.

The screenshot shows the 'eScript One' interface with the 'Management' tab selected. The 'MT Rules' sub-tab is active and highlighted with a red box. Below the navigation bar, the 'MT Validation Rules' section is visible. A list of rules is shown, including 'Missing Associate 2', 'Missing Associate 3', 'Missing Patient', 'No ADT', 'No Co-Signer', 'No DOS', 'Not Missing Appointment or Acct #', 'Order number missing', 'Transcription Body Contains Special Chara', and 'Transcription Body Has Blanks'. Below the list, there is a checkbox for 'Show Inactive Rules' which is checked. There are several action buttons: 'Add New Validation Rule' (with a plus icon), 'Edit Transcription Body Contains Special Characters' (with a pencil icon), 'Copy Transcription Body Contains Special Characters' (with a document icon), and 'Copy Transcription Body Contains Special Characters to Workflow Validation Rule' (with a document icon and a red box around it). At the bottom, there is a 'Load System Defaults' button (with a download icon).

### When copying a rule:

- there cannot be another rule with the same name in the destination location
- the name of the new rule will exactly match the name of the rule being copied
- the description of the rule will be: 'Copy of <description from original rule>'
- the rule will be copied over as inactive
- when copying an MT rule to a Workflow rule, any comment tags will be removed
- when copying an MT rule to a Workflow rule, the 'Warn on Completion' action will be selected by default
- when copying a Workflow rule to an MT rule, no action will be selected by default, and no comment tags will be assigned

The screenshot shows the 'MT Rules' interface. The 'MT Validation Rules' list includes: Missing Associate 3, Missing Patient, No ADT, No Co-Signer, No DOS, Not Missing Appointment or Acct #, Order number missing, **Transcription Body Contains Special Characters** (highlighted in blue), Transcription Body Has Blanks, and Validation Rule for 46283. Below the list, there is a checkbox for 'Show Inactive Rules' (checked), a '+ Add New Validation Rule' button, and several copy/edit actions for the selected rule. The 'Copy Transcription Body Contains Special Characters to' option is highlighted with a red box.



The screenshot shows the 'Workflow Rules' interface. The 'Workflow Validation Rules' list includes: Copy Test Transcription Body Special Characters (highlighted in blue), Final - No Account # Prevent, Missing Associate 1, Prelim - No Acct # - Prevent, Rev/Prelim - No Acct # - Warn, and **Transcription Body Contains Special Chara** (highlighted in red). Below the list, there is a checkbox for 'Show Inactive Rules' (checked), a '+ Add New Validation Rule' button, and several copy/edit actions for the copied rule. The 'Copy Copy Test Transcription Body Special Characters to' option is highlighted with a red box.

## Logging

When a Workflow rule fails, and the user still completes the job – either because the action was to ‘warn’, or the user has override rights – these actions will be shown in the activity log as a ‘Validation Override’.

Time	Action	User	Rule Name
6/16/22 3:21 PM	Print Job Succeeded	SPDOCX Print	Distribution Rule
6/16/22 3:21 PM	Print Job Succeeded	SPDOCX Print	Distribution Rule
6/16/22 3:21 PM	Print Job Succeeded	SPDOCX Print	Distribution Rule
6/16/22 3:39 PM	Viewed	mmoff	InQuery User
6/16/22 3:44 PM	Viewed	mmoff	InQuery User
6/16/22 3:44 PM	Validation Override	mmoff	InQuery User
6/16/22 3:44 PM	Completed From Preliminary	mmoff	InQuery User

The log entry can be expanded to display the following information for each failed rule:

- Failed rule name
- Failed snippets
- Rule type
- Completion Option (Warn on or Prevent Completion)

Time	Action	User	Rule Name
6/16/22 3:39 PM	Viewed	mmoff	InQuery User
6/16/22 3:44 PM	Viewed	mmoff	InQuery User
6/16/22 3:44 PM	Validation Override	mmoff	InQuery User
<b>Validation Rule:</b> Mark Workflow Rule <b>Completion Option:</b> Warn on Completion <b>Rule Type:</b> Workflow Rule <b>Failed Snippets:</b> PID is missing			
6/16/22 3:44 PM	Completed From Preliminary	mmoff	InQuery User

To find these transcriptions with failed validation, run InQuery’s Action Monitor report and select ‘Validation Override’ as the action.

**Note:** [Field] warnings and preventions are not included in the log. To have these logged, create a rule that includes a snippet for [fields].

## Reporting

The following reports have been updated to accommodate Workflow rules:

### Validation Rule History Report

This report shows a history of the changes to the rules. Updates include:

- A new ‘Rule Type’ row has been added under ‘Validation Rule’ that shows ‘MT Rule’ or ‘Workflow Rule’ accordingly.
- The ‘Rule Actions’ section has been updated to list ‘Completion’ as an action with its own row.
- A new ‘User Groups’ highlighted row has been added under the ‘Users’ row.

### Validation Rule Inventory Report

This report shows a list of all validation rules. Updates include:

- A new column has been inserted to the left of ‘Rule Active’ called ‘Rule Type’ that lists what type of rule it is. It will display ‘MT Rule’ or ‘Workflow Rule’ accordingly.
- The ‘Action’ value has been updated for Workflow Rules.
- A ‘Workflow Folders’ column has been added, as well as new columns for ‘User Group Filter’ and ‘User Groups’.

### Inquiry’s Action Monitor Report

This report lists all transcriptions for a given date range that have had a selected action performed.

- Added the ability to search for transcriptions based on ‘Validation Override’.

The screenshot shows the InVision Action Monitor report interface. The navigation bar includes 'Home', 'Completed', 'Workflow', 'Problem List', 'Services', and 'InVision'. Below the navigation bar are tabs for 'Reports', 'Scheduled Reports', and 'Saved Reports'. The 'Action Monitor' section is active, displaying a list of actions. A dropdown menu is open, showing various actions, with 'Validation Override' highlighted in blue. The 'Action' field in the report parameters is also highlighted with a red box.

## Search for Delivered Transcriptions based on Validation Override

In InCommand (Management > Delivered Transcriptions), users can now search for transcriptions with validation overrides via the 'Action Performed' drop-down.

Management	Maintenance	InVision	eSODemo Client Maintenance
Summary ▾	Outstanding Jobs	Delivered Transcriptions	
<i>This feature can only be used for clients where your transcription company is the base company.</i>			
Client	eSODemo ▾		
Transcription ID	Receipt		
Patient ID	Patient Name		
Document Type	Any ▾		
Location	Any ▾		
Action User	All ▾		
Action Performed	Any ▾		
Current Status	Moved to Clinician Sign		
Order Number	Moved to Completed		
Account Number	Moved to Invalid		
	Printed		
	Received		
	Restored		
	Resubmitted		
	Resubmitted for Correction		
	Returned		
	Unappended		
	Unmarked as Test		
	Unsuccessful Edit		
	Validation Override		
	Viewed		
	Workflow Configuration Move - Admin Review		
	Workflow Configuration Move - Autofax Verification		
	Workflow Configuration Move - Clinician Review		
	Workflow Configuration Move - Clinician Sign		
	Workflow Configuration Move - My Referrals		
	Workflow Configuration Move - Print & Mail		

## Application Requirements

- Operating system: Windows 10
- Web Browser: Chrome, Edge, Firefox
- RAM: 1 GB or higher
- Hard Drive Free Space: 1 GB or higher