Workflow Limitations During the Transparent Lockdown

Upstate is using the transparent upgrade process to upgrade to the new version of Epic. During the "transparent lockdown" period before the system downtime for upgrade, you will notice that you cannot make changes that customize certain aspects of your workflows. This is because the transparent upgrade process is updating related data behind the scenes while you continue to use the system.

For SUNY Upstate Medical, the transparent lockdown period will last from **7:00 AM Wednesday May 18 through the completion of upgrade on May 21st.**

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.

Customizing advanced settings for Charge Router Reconciliation and Routed Charges reports

During the lockdown, the Advanced tab does not 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.

Moving Activities to a Sidebar or Floating Window

You cannot move activities, such as the Notes activity, to a floating window or sidebar during the lockdown.

What to do: Wait to move the Notes activity until after the upgrade.

Creating or editing QuickActions

When you create or edit a QuickAction in the 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 IMT Help Desk at 315-464-4115 or use Vocera to reach Clinical Support.