CRStar Insights
Workflow Navigator

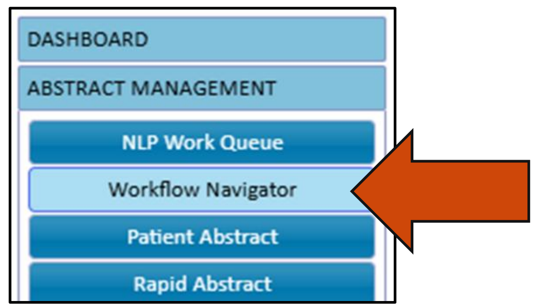
The CRStar *Workflow Navigator* (WFN) is a centralized hub for management of Suspense cases. It serves as a place for casefinding, maintenance of non-reportables, a case assignment module, and launchpad for abstracting. It was deployed for use by all clients on 6/3/2025.

This new module is highly customizable and may be used with varying workflow principles in different facilities and may also be customized by each user according to their preferences. <u>This document should not be considered a comprehenisive guide</u>, but more of a Quick-Start guide to the fundamentals of the Workflow Navigator.

Getting Started with the Workflow Navigator

Access the *Workflow Navigator* in the <u>Abstract Management</u> menu, above the Patient Abstract.

Upon first use, default settings will be active, and no filtering is applied.

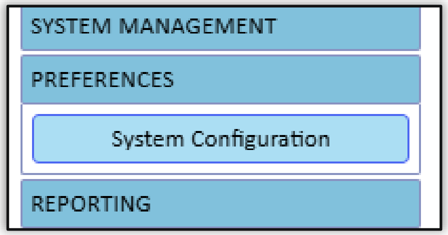


Applying filters in the Workflow Navigator

Hospital Code	MRN	Last Name	First Name	DOB	Site Code	View Patient	Class of Case	Date Case Initiated	First Contact Date
				mm/dd/yyyy				mm/dd/yyyy	03/01/2025
01				mm/dd/yyyy				mm/dd/yyyy	03/30/2025

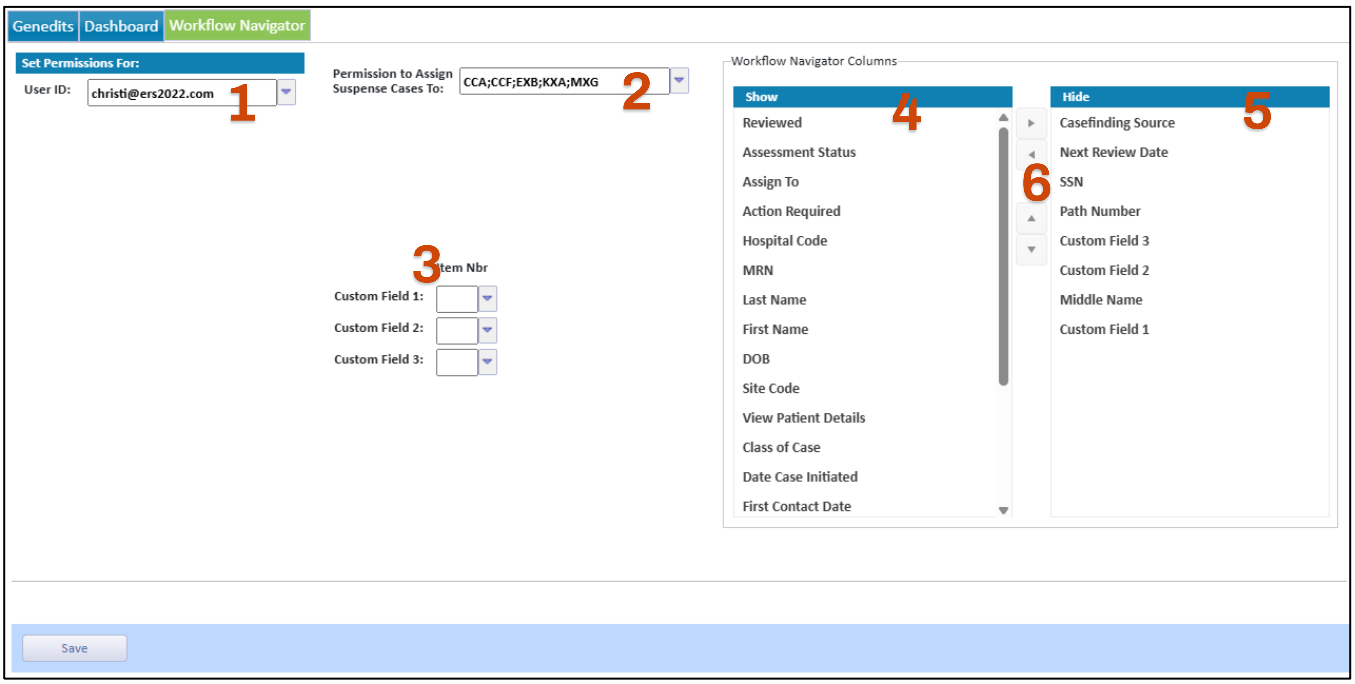
- All columns that contain a white box in the second row down from the column header, can be filtered. Fields with specific options like Hosp Code, Site Code, and Class of Case can be filtered using a single value (ex: 01), multiple values (ex: 01,03,06), or a range (ex: 01-06).
- A range of dates can be used to review a precise time frame, or either date can be left blank to view an open-ended batch of cases.
- Click any column header to sort the cases by the values in that column.
- Once filters are applied and/or columns sorted, they remain so until changed or cleared by the user.

Setting Preferences in the Workflow Navigator



Preferences are found in the System Configuration menu > Workflow Navigator.

Each user that has access to the WFN preferences menu may configure their own settings.



1 – The user for which preferences are being set.

2 – The abstractors to which this user will be allowed to assign cases.

3 – Custom fields that can be used to add necessary data to new columns in the WFN.

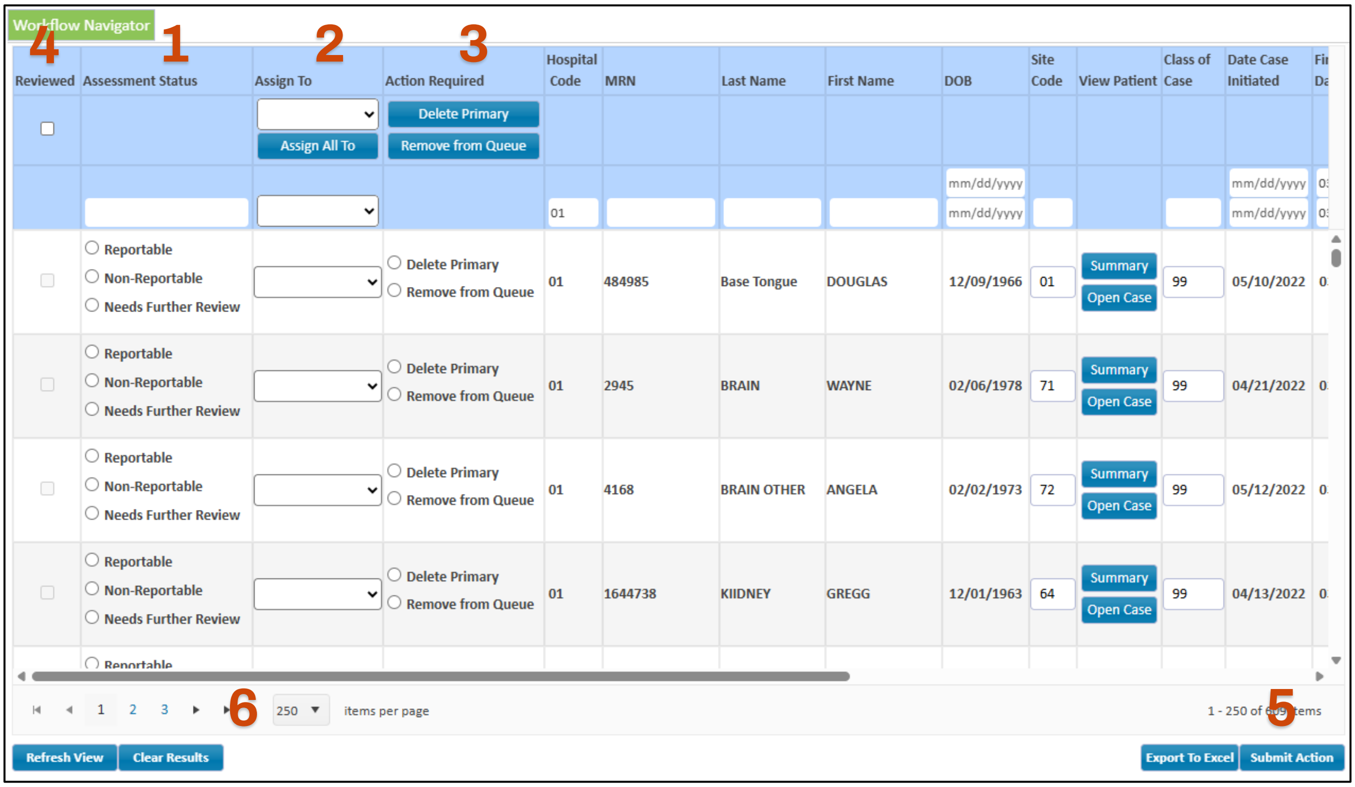
4 – Columns that are preferred to be displayed in the WFN for this user.

5 – Columns that are preferred to be hidden in the WFN for this user.

6 – Functional buttons for moving columns from "Show" to "Hide" and for moving columns up or down the list (items at the *top* of the "Show" list will appear at the *left* on the WFN).

Settings remain in effect during normal use unless they are changed here

Managing Suspense Cases in the Workflow Navigator



1 – When case-finding, the radio buttons in this column are used to designate reportability.

2 – Assign a batch of cases to a user with the top row drop-down and “Assign All To” button. Assign individual cases using the patient row drop-down in this column.

3 – Use the radio buttons in each row to specify an action for non-reportable cases. If list is filtered to all NR cases, user can choose to specify actions in batches using the dark blue “Delete Primary” and “Remove from Queue” buttons in the top row. (**Delete primary deletes that primary from the database; therefore, deleting the patient IF that is their only primary**. Remove from Queue leaves the case in suspense but hides it from WFN).

4 – Once a selection has been made in the Assessment Status column and in the Action Required column, the Reviewed column is activated. The check box here must be checked to Submit the action specified in the Action Required column. The check box in the top row can be used to apply “Reviewed” status to all eligible cases in the view.

5 – Submit Action button is clicked to execute the action specified in the “Action Required” column.

6 – Use this drop-down to specify the number of cases to be displayed, up to 500. When executing actions or applying batch assignments, it applies to everything in the view.

Using the View Patient functions in the Workflow Navigator

The "View Patient" column contains two action buttons for each case.

The "Summary" button opens the Patient Details window which displays patient identifiers, a list of primaries, and Comments and Suspense Remarks.

The "Open Case" button launches the Patient Maintenance screen for this primary.

Managing Historical Non-Reportable Cases in the Workflow Navigator

The Workflow Navigator will, by default, display **all** suspense cases, including those which have been designated as NR in the past and maintained in suspense. If you do not wish to see those historical NRs displayed, a System Admin User should open a support ticket requesting help to eliminate those cases from the default view in WFN.

For More Information about the Workflow Navigator

For more information about using the Workflow Navigator, please attend the 6/4/2025 session of Data Bites. For registration information (or for the recording after 6/4/2025), please visit the CRStar Resource Page.

