



November 2024

Review the latest Lumeon Conductor features and enhancements. **Coming soon!** We are currently building the new documentation site for Lumeon Conductor. In the meantime, please access the PDF versions of the [Lumeon Conductor Docs](#).

Diary Management

New Features and Enhancements

Create Core Config for new Diary Search

The diary search feature has been updated. To use the new diary search feature, please contact Lumeon Support.

Note: The feature is controlled by a new configuration parameter, *enable_optimised_appointment_search*. Setting this value to true will enable this feature.

Fixes

- **Questions not linked to appointment type:** The issue that caused an error to display when you tried to link a question to an appointment type has been resolved. You can now link a question to an appointment type, as expected.

Digital Rounding

New Features and Enhancements

ADOD Time widget

The time now displays on the ADOD (anticipated date of discharge) widget. Previously, the ADOD widget only showed the date.

Allow Actions appearing on a task to be controlled by twig rules. The display of Actions in a Task has been improved by adding an extra field for the definition of each action in the Field Display Control screen. This enables you to use Twig statements to control when the action appears, such as for specific task types only.

Previously, you could define the actions that appeared at the top of a task by entering the text for the action in the Field Display Control screen. These actions then appeared for all task types.

Lookup functionality within Twig Template

The Lookup functionality (lookup.get, lookup.has) can now be used within the Twig Template of Worklist Template Fields. This enables the Worklist Template Fields to retrieve data from a Lookup table rather than configuring them to contain all retrievable data and any corresponding display logic.

Add Status to Digital Rounds

A new Status field is available on the Create/Update Round Configuration window. This enables the user to control whether the round is viewable in the Start Round dropdown on the Digital Rounds screen. The status default is Active so that the round displays in the dropdown and the round facilitator can choose it as the round configuration for the digital round. It can be changed to Inactive so that it does not display

Add Copy and Delete to Digital Rounds

Copy and Delete functions are now available on the Round Types screen.

- **Copy:** Enables the user to create a copy of an existing round type. You can then make changes to it and save it as a new round type.
- **Delete:** Enables the user to remove an existing round type from the list of existing round types. The round type can be deleted if it is active or inactive.

EMR

🔧 Fixes

- **Improved note saving:** The issue that prevented the "Failed to save the section" popup error message from closing has been resolved. You can now dismiss this message and save your EMR notes again.

FHIR APIs

🔔 New Features and Enhancements

FHIR API enhancement for Appointment modules

The FHIR API now allows for the inclusion of appointment modules when booking or updating appointments. A new FHIR extension enables the specification of selected modules for each section of the appointment, supporting improved patient self-scheduling of Health Assessment appointments.

Pathway Orchestration

New Features and Enhancements

Event-driven pathways

A new Trigger Event pathway function is now available. This enables an event with a custom name and data to be triggered from an activity, which is passed to all its descendant activities, triggering their evaluation. This supports the building of loosely coupled modular pathways from individual component pathways.

Enable Lookup table management via CSV download and upload

A new lookup table management is available for Lookups to enable editing lookup tables by file upload. This enables you to update a lookup table in the following ways:

- **Add only:** Any new key/value/comment rows whose keys are not already in the lookup table will be added.
- **Add and replace:** Any new key/value/comment rows whose keys are not already in the lookup will be added and those with matching keys will be replaced with the data in the file.
- **Replace only:** Any matching key/value/comment rows in the lookup will be replaced with those in the file.
- **Remove only:** Any rows from the lookup whose keys match those in the file will be removed.
- **Remove all and add:** All rows will be removed from the lookup and all the rows from in the file will be added.
- **Download this Lookup as CSV:** Enables a user to download the contents of a lookup table to use a starting point for the operations above.
- **Confirmation message:** Displays before uploading a file to a lookup table. This helps you minimize mistakes.

Add Comment/Notes to Lookups at Lookup Table Level

A Description box is now available on Lookups. This feature enables users to describe or add notes to a lookup table. This helps you differentiate between tables and understand their uses. This is an optional field.

Patient Journey

New Features and Enhancements

Patient Search via MRN

Previously, the ability to search patients via MRN from the Patient Search screen was only available to clients using the DICOM feature. This option is now available to all clients

Display classic UI forms

You can now view classic forms (forms without the Display in New UI checkbox selected) in the new unified UI. Previously, the form would not display corrected if you attempted to view it.

Fixes

- **External identifier changes logged incorrectly:** The issue that caused only the latest change to display in the log instead of all changes when you made multiple changes on the External Identifier screen for a referral has been resolved. A log item now displays for each change that is made, as expected.

Reporting

New Features and Enhancements

New column and filters on Report Scheduler

A Created by column is now available on the Report Scheduler. Additionally, A Created By and Status is now available.

- **Created By column:** Displays the user who created each scheduled report.
- **Created By filter:** Enables you to filter the report list by the Created By column.
- **Status filter:** Enables you to filter the report list by the Status column.

SMS Communication

New Features and Enhancements

Improve SMS opt-out handling

SMS opt-out handling has been improved. Any SMS incoming to Conductor will first have its value checked to see if it's equivalent to a configured opt-out keyword, regardless of any outgoing messages logged. If the incoming message value is equivalent to a configured opt-out keyword, it will then check the associated campaign to see if it should be handled via the new SMS handling process or sent to routing code.

Previously, if there were no active outgoing messages, it would be sent to routing code regardless of campaign configuration.

Improve handling of inbound SMS messages

Incoming SMS message will now always first check if the campaign is configured to use the new SMS handling process or if it should be sent to routing code, regardless of the response status for the outgoing messages.

Cancel old-style SMS template messages if expiry time has passed

Old-style SMS templates are now set to expire if their expiry time has passed. Previously, only new-style SMS templates were being set to expired.

Rename new SMS process labels on Campaign

The 'Use new SMS process' checkbox on the Campaign screen has been renamed to 'Match incoming SMS to logged outbound messages' to better clarify what the checkbox impacts.

SMS opt-out keywords case agnostic

Opt-out keywords configured within the UI are now case agnostic when a patient texts in the keyword. Regardless of the capitalization, it will process correctly if the word matches.

Simplified SMS template configuration

The expected responses section of the SMS template configuration has been simplified. There are now radio buttons for Variable, Fixed, or None, as expected responses. If Fixed is selected, a new box will display which enables you to create the expected fixed responses and drop them directly into the template.

Tasks and Task Collections

New Features and Enhancements

New Task Collection data points

There are new Task Collection data points to the Create Search Template modal. These data points are available in the context of the *Task_collection*, *Patient*, and *Activity base* objects.

Task Manager Enhancements: Task Collections Support

The Task Manager is enhanced to support displaying both tasks and task collections, enabling you to easily manage and distinguish between both. This update includes improved filtering, display adjustments, and seamless interaction with both tasks and task collections.

- **Task and Task Collection Display:** Tasks and task collections display with clear distinctions. Task collections are shown in the Task Collection column, while individual tasks display in the Task Type column.
- **New Task/Collection Filter:** New filter to toggle between displaying tasks, task collections, or both.

- **Filter Compatibility:** All existing filters, such as Status, Priority and Assigned To work seamlessly with both tasks and task collections.
- **Task Collection Modal:** You can open a Task Collection modal by clicking on the Task Collection name within Task Manager.

New Task Collection Events widget

There is a new Task Collection Events widget, offering a consolidated view of all notes and events from tasks within a Task Collection, along with those directly on the Task Collection. This widget organizes logs into a single, easy-to-read table, sorted by timestamp in descending order.

The new Log Table includes:

- **Date:** Displays the timestamp of when the event occurred.
- **Source:** Identifies the originating task or task collection for each entry.
- **Note:** Displays the event that occurred.

Task Collections functionality

The Task Collections functionality has been expanded to include all the capabilities and features available for tasks, significantly expanding the usefulness of Task Collections.

Task Collection data points

Task Collections can now be configured with the following data points:

- Default Subject
- Default Detail
- Instructions
- Default Priority
- Default Assignee Type
- Default Assignee
- Default Due Date

Task Modals for Task Collections

Task Collections now utilize the existing task creation and task detail modals, making it easier to create and update task collections using default values for fields such as subject, due date, and detail.

Task Manager integration

Task Collections now appear in the Task Manager, enabling better organization and assignment management.

Task Pathway Functions

Task creation and modification Pathway Functions now fully support Task collections, enabling

actions such as assigning task collections, updating task collection details, and more.

Access Task Collection properties via Twig

Task Collections and their properties can now be accessed using Twig, similar to how tasks are accessed.

Support for Task Attributes

Task Collections can now use Task Attributes, enabling the same flexibility in assigning attribute values as individual tasks.

Field display control settings to vary by task type

The task field display controls now vary based on the task type for the Task Detail actions, Task Detail display, and New Task Display.

The Task Manager and Task Display controls are now a separate configuration page.

Change Update Task pathway function to include Task Collection parameter

The pathway function for Update Task has been enhanced by adding a new parameter that defines a task collection ID using Twig. The new parameter is called Assign to Task Collection.

This parameter can have the following values:

- **A Task Collection ID:** The pathway function links the task to the defined task collection.
- **empty:** The pathway function ignores the parameter and makes no changes to any existing linked task collection.
- **0:** The pathway function removes the linked task collection from the task.

Add new security points to control display of task items

New security points are available to control the display of Task Collections and Task Action Links menu items.

Patient Task Collections widget

The new Patient Task Collections widget to enhance the display of task collections related to patient encounters and activities within worklists and Quick View*.

Task collection table

The widget displays all task collections of the Task Group type for the current patient encounter or activity.

- **Task Group:** The task collection names are hyperlinked to the task detail modal for further information on the task collection.
- **Due Date:** Displays either the task collection's due date or the calculated due date based on a customizable Twig formula, depending on the configuration.
- **Status:** Indicates the current status of each task collection.

- **Priority:** Displays either the task collection's priority or the calculated priority based on a customizable Twig formula, depending on the configuration.
- **Assigned To:** Displays the name of the user assigned to the task collection.
- **Ownership Actions:** Enables the logged in user to assign and unassign the task collection to and from themselves.

Configurable Twig formulas

The widget can be configured with raw Twig formulas to customize the calculation of priority and due dates for task collections, providing flexibility for how the data is displayed.

Optional current task display

A checkbox enables users to include the current task collection in the table display. When selected, the current task is marked with an asterisk.

Table sorting

Task collections are sorted by the due date in ascending order. If the due dates are identical, task collections are sorted by created date.

Add filter to actionable worklist columns

You can now filter worklist columns containing an action (hyperlink). This enables you to easily filter and find worklist results across all columns. Previously only columns containing plain text could be filtered.

Note: Worklist filtering is only available on search template-based worklists.

Add Expected Duration to Task Type and Task Collection Type

The Expected Duration (minutes) field is now available on the task type modal and task collection type.

The fields are non-mandatory and will only accept integers or empty values, with the default value being empty. The fields are accessible via Twig.

- `taskType.ExpectedDuration`
- `taskCollection.ExpectedDuration`

Worklist assign task collection pathway

A new `WorklistAssignTaskCollection` pathway function is available that enables you to assign task collections directly from a worklist row to yourself or a task queue. The pathway function supports both Twig and hardcoded values for the assignee. This feature streamlines task collection management by enabling assignment actions directly from a worklist.

Single Task Collection widget

The new Single Task Collection widget provides a comprehensive view of a task collection

entity and the tasks within it, enabling you to view details, take actions, and manage tasks effectively within a collection.

Task Collection Details

The Task Collection Detail area of the widget displays key information about a task collection, including Task Group Name, Priority, Due Date, Status, and Assignee.

You can assign or unassign yourself from a task collection by selecting the Assign to Me or Unassign buttons. Additionally, the widget can be configured using raw Twig formulas to customize priority and due date calculations, offering flexibility in data presentation.

Task Tables

The widget features two task tables: Open Tasks and Closed Tasks.

Open Tasks

The Open Tasks table enables you to prioritize and manage tasks within a task collection, with tasks ordered by priority (High, Normal, Low) and duration open. Users can click on individual tasks to access more details in the task modal:

Time Remaining

The table includes a Time Remaining column, where time is calculated based on when the task status changes from Not started to In progress, plus its expected duration.

Expected Duration is configured against the task type, and can vary between task types within a task collection.

- Time Remaining = (Start Time + Expected Duration) - Current Time.
- Negative values appear in bold red font, highlighting overdue tasks.
- If a task lacks an expected duration, a dash ("-") is shown.

Below the Open Tasks table, two action buttons display for further task collection management:

- **Duplicate Task Group:** Creates a new instance of the task collection with a fresh set of tasks.
- **Add Task:** Opens the Create New Task modal, allowing users to add a specific task to the task collection.

Closed Tasks

The Closed Tasks table lists tasks with a Closed status, including those closed with reasons such as Withdrawn or Complete. You can click on any closed task to open the task modal and view additional details. The Closed Tasks table includes the following columns: Closed Task Name, Close Reason, Assignee, and Close Date/Time.

This Single Task Collection widget provides users with greater control and flexibility in managing task collections, streamlining task organization and visibility.

Patient Task Collections Widget

Task Collections can be one of two types, Task Group or Task Collection.

The Patient Task Collections Quick View widget now filters to only display task collections of type Task Group. This enables administrators to define which type of task collections are shown in this widget, rather than displaying all task collection types.

Add task or task collection ID access via Twig

You can now reference the ID of the task or task collection on which an action is triggered using Twig within Task Detail modals. Users can now use Twig expressions like *task.id* or *taskCollection.id* to reference the ID of the current task or task collection in various contexts, including task instructions, task headers, and pathway functions.

Example use case: When an action is triggered from the Task detail modal or worklist row, Twig can now reference the task or task collection ID. For example, a task collection's ID can be referenced to using to update the correct task attribute.

New Task fields reset

The New Task modal will not automatically reset to the default when changing field values for fields Patient, Change Assign to Type, Change Assignee, and Change Activity.

Add Twig accessibility to logged in user's info

The logged in user's information is now accessible via Twig using *loggedInUser().id*

Use case: This allows the passing of their user Id to the Update Task Action pathway function, so that a user can assign themselves to a Task.

Field display control settings vary by task type

The task field display controls now vary based on the task type for the Task Detail actions, Task Detail display, and New Task Display.

The Task Manager and Task Display controls are now a separate configuration page.

Separate controls for Patient and Admin links on Task Details

There are now separate controls for the Patient and Admin links on the Task Detail display within the Task Display Control screen. This controls if the links are hidden or viewable.

🔧 Fixes

- **Security point for task reassign button:** Previously, a security point was not available for the Reassign button on the task detail window. A new security point that controls whether the Reassign button displays on the task detail window is now available. Your organization can now decide who access types can reassign tasks to another user.

User Management

New Features and Enhancements

Add Has Access column to Staff screen

The Has Access column is now available on the Staff screen. This new column enables administrators to easily confirm which staff members have been granted user access to CPM. A checkmark icon indicates that the user has access.

Maintenance Mode during upgrades

A new Maintenance Mode feature is available to improve the upgrade process. This feature enables Lumeon support to temporarily restrict system access to a set of authorized users only. During this time, an alert is displayed on the login page, notifying users that Maintenance Mode is enabled. This will help prevent data loss and ensure a smooth upgrade process.

Worklists

New Features and Enhancements

Sort worklists on dates correctly

Conductor now sorts dates in date order. There is a new Datatype field on the Update Worklist Template Fields window. When you define the columns on a worklist template and select the field type as Display, you can select the Datatype as Text, Integer, or Date. If they select Date, the dates display in correct ascending/descending order on the worklist.

Previously, Conductor sorted dates in worklist columns in alphabetical/numerical order rather than date order. For example, if the months display in words, a December date would display before a May date in ascending sort order. Also, if dates display in MM/DD/YYYY or DD/MM/YYY format, dates with lower months or days are displayed first rather than in year order first. For example, 01/01/1980 would display before 02/02/1960 in ascending sort order.

Add Copy and Delete buttons to the Worklist Templates page

Copy and Delete buttons are now available on the Worklist Templates screen.

- **Copy:** Enables you to create a copy of an existing worklist template. You can make any necessary changes to the copy and save it as a new worklist template.
- **Delete:** Enables you to delete a worklist template from the list of existing worklist templates. A confirmation alert is displayed to prevent accidental deletion when you click the Delete button.

Worklists automatically refresh when closing Quickview

Worklists now automatically refresh when you close any Quickview window. This improves your experience by ensuring that all worklist data remains current, including any data that has changed while the Quickview has been open or has been changed through your actions within the Quickview window.

Coming soon! Access Health Catalyst Community site to:

- Ask a question
- Request a feature
- View release notes
- Access documentation
- View product roadmap
- Take a product survey