**Workflow Management – Spanish Summaries:**

**Desired Features:**

1.      Ability to quickly identify documents that are ready for translation.

2.      Ability to track the status and progress of documents from creation or modification until they    are made publishable.

3.      Ability to assign specific tasks to staff.

4.      Ability to know whether a task is being performed and whether it is completed.

5.      Ability to see all workflow information in one place.

6.      Ability to receive weekly or daily scheduled email notification based on default values (to be provided).  
   
  **Specifications:**  

**1.**   **Create a new optional processing status block for the summary schema that would contain elements for the workflow report.**  

**Proposed Elements**

1.      Assigned to (drop down menu with all users in the CDR)

2.      Translation Status Date (Date that the Translation Status value is added or changed)

3.      Translation Status

* Ready For Translation
* Translation PendingTranslation In Progress
* Translation Complete
* Translation Peer Review 1 Pending
* TranslationPeer Review 1 in Progress
* Translation Peer Review 1 Complete
* Translation  Peer Review 2  Pending
* Translation Peer Review 2 Complete
* Translation Made Publishable

4.      Type of Summary Change

* + - Editorial Change
    - Major Changes
    - New Summary
    - Comprehensive Revision
    - Reformat

**1.**      The block would be used in both the English and Spanish Summaries

**2.**      Only one block per summary would be used.

3. Use a combination "Ready For Translation" in the English Doc and "Translation Complete" in the Spanish Doc to determine when an English summary drops off the list. This would indicate that a translation process has been completed.

**4.**      The same block will be updated or existing block deleted and new one added each time there are changes that need translation.

**5.**      “Ready For Translation” should be the default value in English summaries.

**6.**      The "Assigned To field" in the English Summary would always default to Linda's Username with the ability to change it when needed.

**7.**      The "Assigned To" field would determine who receives email notification.  

**2. Create new report page with the following columns:**   
   
   
   
**|CDR ID | Title| Audience| | Assigned To | Translation Status | Translation Status Date | Type of Change | TRANSLATED DOC CDR ID |**  
   
  

1. The results of the report should be displayed both in HTML and MS Excel

1. The report would be categorized broadly into English and Spanish Summaries.  The Language data should be derived from the summary containing the Processing Status block.

1. The report interface should allow the report to be run based on each language or both languages. The default will be to run for both languages.

1. The interface should allow the report to be run based on each user thus retrieving only documents assigned to the  user.

1. The Audience should be taken from the summary containing the Processing Status block.

1. The report should have the ability to be run based on a date range with a default of the 7 days.

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1. The Spanish summaries would drop off the report when a Translation Status of  "Translation  Made Publishable" is selected and and a publishable version is created.

1. There are two "Type of Summary Change" elements referenced in this document. For HP summaries, populate the "Type of Change" column with the data from

the  "Type of Summary Change Value " element in the HP Summary (not from the processing status block).

1. For Patient summaries, populate “Type of Change” column with the data from the “Type of Summary Change” element in the Processing Status block. When there is a conflict, display the data from the element in the Processing Status block.

1. There should be counts at the end of the report of the various statuses that have been selected.

1. For the English document, [scheduled] email notifications should be sent to the “Assigned To" user whenever there is a new  "Translation Status" value and a publishable version is created.

1. The TRANSLATED DOC CDR ID will display the CDR ID of the Spanish document when one exists. This will be the case for existing summaries. New summaries will not have a CDR ID for the Spanish doc.

   
   
   
   
   
   
   
   
   
   
   
      
   
   
   
      
   
   
   
   
   
   
   
   
   
   
   
   
 