

Issues in Data Central

Issues are created, answered, and tracked within illuminate and are not pushed to any external systems, except for sending an optional email notification to the user the issue has been assigned to.

Access Create Issue Window

Issues can be created from panels, listings, detail windows, and Graphical Patient Profiles (GPP).

From the Subjects Panel:

1. Highlight a record and click the Create Issue icon in the panel toolbar, OR
2. Right-click on a record and select Create Issue.

From a Data Listing:

1. Check the box(es) at the left of each record, or right-click on a record.
2. Click the Create icon (+) in the panel toolbar or from the pop-up window.
3. Select Create Issue.

From a Listing Detail view:

1. Create an issue on the full record or select a field.
2. Click Create (+) in the panel toolbar or right-click.
3. From the drop-down, select Create Issue or Create Domain Issue.

From a Queries Details view:

1. From the Queries listing, open a query record.
2. Click the Create Issue icon in the panel toolbar.

From a Graphical Patient Profile:

1. To create an issue on the entire profile, click the Create Issue icon in the panel toolbar.
2. To create an issue on a section of the profile, click the Create Issue icon at the right of the section.
3. To create an issue on a data point, double click the data point in the GPP. Follow the steps for the Detail view.

Create an Issue

The Create Issue window opens with identifying pre-populated fields at the top. Issues have both default entries and required fields (identified by a red star).

1. **Priority** defaults to Moderate; change as appropriate.
2. **Assign To** defaults to User; change to Role or User Group, as appropriate, and then that from the associated drop-down.
3. **Due By** date defaults to the next day; change as appropriate and then click **OK**.
4. **Issue Text** allows for 4000 characters. Be specific.
5. **Send Notification to the User/Role/User Group** should be checked, as appropriate. If checked, select either **Send in batch** (puts issues into a queue and a Task must then be created), or **Send immediately**.
6. **Receive notifications for these changes** should be checked if you want to notify when an action has been taken on the issue.
7. Click **Save**.

Note: Issues created from an Exception or Reconciliation Listing may auto-populate the Issue Text field with the text in the 'QueryText' column.

Open the Issues Panel

To open the Issues Panel, click on Issues from the left navigation. This displays any Open, Answered, Closed, or Cancelled issues.

Open the Details View

To open the Details view for a record, use one of the following methods:

- Double-click on a record.
- Highlight a record and then click the Details icon.

Use Filters to Refine Records

Use column filters to limit the results to the issues of interest.

- Find issues assigned to you that require your action:
 - Status = Open and Assigned To = your username
- Find issues you opened to see the response, and then close, as appropriate:
 - Opened By = your username and Status = Answered
- Find RBQM related issues by clicking the RBQM Filters icon in the Issues toolbar.

Action Issues

Actions depend on Role and the Status of the issue: Answer – Close* – Cancel – Reopen** – In Progress (if configured)

Multiple Issues can be managed at one time from the Issues panel**:

1. Check the box(es) at the left of each record.
2. Click the Action icon.
3. Select the appropriate action.

Other ways to action an Issue:

- To action a single Issue from the panel, right-click on a record, select Action, then select action item.
- To action from the Details view, use the icons in the panel toolbar.
- In the Details view, Issues can be managed from the Related Issues section.

*When closing an RBQM issue, you have an option to snooze it.

**Single Closed Issues can be reopened.

Additional Details

- View the source of an issue by clicking the hyperlink in the Type field.
- View or add comments from the Issues panel or Details view.
- Edit an issue, such as changing the priority or the assignee, depending on the status of the Issue.