Chapter 4: Using the Worklist

The SEER*DMS workflow provides a configurable means to direct the flow of records and other system data through the appropriate automatic and manual tasks. The workflow controls the path of a record through the editing, screening, matching, and consolidation tasks with the ultimate goal of incorporating it into the patient set data.

A record entering the workflow is initially processed in a series of automatic tasks. If human attention is required in order to complete a task, a manual task is initiated. Once a staff member completes the manual task, the record continues to the next automatic task in the workflow. The record moves from automatic to manual processes as necessary, until it completes its journey through the workflow.

The SEER*DMS worklist provides a view of the automatic tasks that are currently running and the manual tasks that require attention. The manual tasks displayed in the worklist are the staff's "to do list". Users can select tasks to complete or managers can assign tasks to users, depending on registry policy. The automatic tasks are displayed in the worklist to allow you to track the flow of data and, in rare situations, cancel automatic processes.

A unique Task ID is assigned to the first task created when a record enters the workflow. As that record moves from task to task, the Task ID remains the same. The same Task ID is retained until the record exits the workflow.

In this chapter, you'll learn about

- Data Shown in the Worklist
- Sorting the Worklist
- Searching or Filtering the Worklist:
    - Searching for a Record or Patient Set in the Worklist
    - Filtering by User Assignment, Task Type, Task Age, and Other Data Items
- Following Data through the Worklist
- Assigning, Releasing, or Rerouting Tasks
- Opening a Task Assigned to You
- Opening an Unassigned Task
- Terminating Manual Tasks
- Restarting Workflow Activity
- Viewing or Aborting Automatic Tasks
- System Failure Tasks
- Printing the Worklist
- Worklist Tasks
- Workflow Reports

Data Shown in the Worklist

There are many ways to access the worklist; the route you take only affects the default values set in the filter. Once you go to the worklist, you will be able to adjust the filters to create an appropriate list of tasks. Your account's system permissions determine which tasks you will be able to view and access.

To view all worklist tasks assigned to you, select **View > Worklist** or click the **Worklist** link on the Home page. To view tasks of a certain type that are assigned to you, use the shortcut links in the **My Tasks** section of the Home page. To view tasks of a certain type that are unassigned, use the shortcut links in **Unassigned Tasks**.

The following data columns are shown in the worklist:

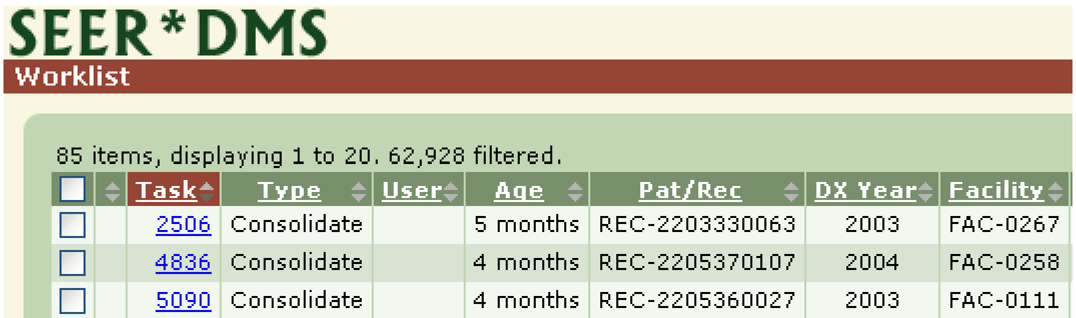
- **Task** – Unique ID assigned to the series of processes used to move the data through the workflow (the same ID is maintained as a record moves from one type of task to another)
- **Type** – Type of workflow task, as described in the *Workflow Tasks* section of this chapter
- **User** - The user assigned to this task
- **Age** – Length of time since the task was created (shown if Show Age is checked). Age is reset when the data move forward to a new task type.
- **Date** – Date the task was created (shown if Show Age is unchecked). Date is reset when the data move forward to a new task type.
- **Pat/Rec** – ID of the Patient Set or Record ID that is the focus of the task. If the processing of a record triggered the task and the record is not yet linked to a patient set, the Record ID will be shown. Once the record is linked to a Patient Set, the Patient Set ID will be shown. Click the Information Icon ⓘ next to the record's or patient set's ID to see values of key fields.
- **Reg** – Region. This column is only displayed if your registry's implementation of SEER*DMS is configured to support multiple regions.
- **Dx Year** – Year of diagnosis. If a record is the focus of the task and year of diagnosis is not available or not applicable for that record, this column will contain the screening year, year of admission, or year of last contact as determined by the type of data. A date from the incoming record is used if the record has not yet been linked to a patient set. Once the record is linked to a patient set, the date of diagnosis for a CTC is used. If the Patient Set has multiple CTCs and all CTCs are submissible, this will be the date of diagnosis of the CTC to which the task's original record is linked. Otherwise this column will contain the year of diagnosis for the earliest diagnosed, non-submissible CTC. Year is populated in this manner to enable you to identify tasks that must be completed for the next submission.
- **Facility** – Reporting facility
- **Site** – Cancer site. The site coded on the incoming record is used if the record has not yet been linked to a patient set. Once the record is linked to a patient set, the site and year of diagnosis are based on a CTC in the patient set. Refer to the description of Dx Year for description of the CTC that is selected.
- **Information** – A text field displaying additional task-specific data items (Patient Name, Record Type, etc.)

The worklist often contains too many results to fit on the screen all at once. In these cases, the list will be broken into several pages. Use the Page Selection links to view the rest of the list, or use the Filter controls to search or limit the list.

When you open a worklist item, the task is assigned to you to prevent two users from inadvertently working on the same task. Once assigned, tasks may be rerouted to other users or designated as unassigned. The steps and account permissions required to reroute or release tasks are described in *Assigning, Releasing, and Rerouting Tasks*.

Sorting the Worklist

In SEER*DMS, a table is sorted by the column with a highlighted column header (highlighted in red in the example below; other colors are used in different color schemes). In the example below, the worklist is sorted by Task ID. The up arrow next to "Task" indicates that the table is sorted in ascending order. To sort the worklist by any of the data items, click on the corresponding column heading. To reverse the sort order, click the column header again.



Searching or Filtering the Worklist

System permissions are required to view and access certain task types (refer to the *Worklist Tasks* section of this chapter for more information.)

To search for a task related to a specific patient, record, or patient set:

1. Select **View > Worklist**, or click the **Worklist** link on the Home page.

2. By default, only your tasks are displayed. If you would like to search all tasks:

    a. Remove the text in the **User(s)** filter.

    b. Check **Show Unassigned.**

3. If you know the record or patient set ID, enter it into the **Pat/Rec ID(s)** filter. To enter multiple IDs, click the down arrow to expand the filter.

4. To search by patient name:

    a. If you would like to search for a specific patient by name, enter search text into the **Information** filter. If you enter *John Smith*, tasks related to patients named either John or Smith will be returned. If you use quotes and enter "Smith, John", only tasks related to patients named John Smith will be returned.

    b. **Tip:** To find tasks for patients whose names start with an M, enter "; M" into the **Information** filter. You must include the quotes in your search text.

5. Click **Apply**.

6. If you cannot find the data in the worklist, the record or patient set may have completed its journey through the workflow. If you searched by Record ID, the task will not be listed unless the record is still the focus of the task. Once the record is linked to a Patient Set, the Patient Set ID becomes the focus ID. To determine whether the record is still in the workflow, use the Patient Lookup to find the record and open it in the editor. If the record is involved in a worklist task, SEER*DMS will post a message at the top of the page and include a link to view the task. Detailed instructions for using the Patient Lookup are provided in *Chapter 20: Searching for Records and Patients*.

To filter the worklist:

1. Use the **Type(s)** filter to search for tasks by task type. Scroll through the list in the Type(s) filter and click the relevant task type. To select more than one type, hold down the CTRL key and click each desired type. To deselect a type, click it a second time while holding the CTRL key. The entries in the Type(s) filter are described in *Worklist Tasks*.

2. If you would like to search for a specific task and you know its ID, enter the ID into the **Task ID(s)** filter. To enter multiple IDs, click the down arrow to expand the filter.

3. If you would like to search for specific data, enter one or more IDs into the **Pat/Rec ID(s)** filter. To enter multiple IDs, click the down arrow to expand the filter.

4. To search for tasks related to data loaded on a specific day or in a particular import, enter the **Import ID** or click the Lookup icon to select the Import ID from a list. You may enter two or more IDs separated by a space.

5. Use the **User(s)** filter and **Show Unassigned** box to display tasks based on assignment:

   a. To show tasks assigned to a particular user, enter the full user name in the **User(s)** filter. You may enter two or more user names separated by a space.

   b. To show tasks assigned to all users, remove all text from the **User(s)** filter. Blank in any filter selects all values for the field.

   c. If you are *only* interested in unassigned tasks, enter *unassigned* in the **User(s)** filter. You must also check the **Show Unassigned** box as described in step 3. (**Tip:** Any text that is not a registered username will work. For example, enter "X" in the User(s) filter and check Show Unassigned. When you click Apply, SEER*DMS will attempt to show tasks assigned to user X and the unassigned tasks. Since there is no user X, only unassigned tasks will be listed.)

   d. To include unassigned tasks, check the **Show Unassigned** box. If you are only interested in tasks that are currently assigned to a SEER*DMS user, leave this box unchecked (and set the User(s) filter as described in step 2).

6. Use the **Information** filter to search by text displayed in the Information column, such as patient name or record type. The data items displayed in the Information column vary by task type and are documented in the chapters related to each specific task. To match a complete phrase, enclose it in quotes (e.g., *"Smith, John"*). If you enter *John Smith* or *Smith, John* without quotes, tasks related to patients named either John or Smith will be returned (the list could include names such as John Smith, John Doe, and William Smith).

7. **Age** and **Date** are two expressions of the same attribute, the time that the task was created. The worklist allows you to filter on this attribute using date filters. By default, the worklist displays task Age instead of the exact date and time the task was created. To display Date instead of Age, uncheck the **Show Age** box. To specify a date range, enter values in the **From** and **To** filters. Use the *MM-DD-YYYY* format, or click the Calendar icon. You may enter an open-ended range to include all dates prior to or later than a specific date.

8. Use the **DX Year** filter to search for tasks by year of diagnosis. You may specify a range of years (e.g., *2002-2004*) or use a comma to select separate years (e.g., *2002, 2004*).

9. Use the **Facility** filter to display tasks involving records and patient sets corresponding to a specific reporting facility. Enter the Facility ID or click the Lookup icon to select the facility from a list.

10. Use the **Site** filter to search tasks by cancer site. Click the Lookup icon to select a single code from a list or type one or more codes into the box (separate the codes by commas or spaces). You may enter a partial string. For example, enter C50 to search for site codes of C500 through C509.

11. Use the **Data Type** filter to search for tasks by the type of data that is the focus of the task. You may select one record type or patient set. Once a record moves through the workflow and is linked to a patient set, the patient set will be the focus of the task. If a task involves multiple records, the records other than the focus record are not considered when searching by record type.

12. Use the **Reportability** filter to search for record tasks with a specific value for reportability. Once the record is linked to a patient set, the patient set becomes the focus of the task. The Reportability filter cannot be used to search for Patient Set tasks (Visual Edit Patient Set, Resolve Patient Set Errors, for example).

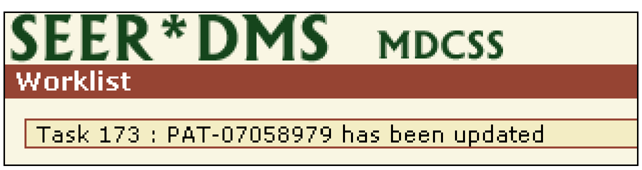
13. If the filters are set appropriately, click **Apply**. Click **Reset** to restore default settings.

Following Data through the Worklist

A Task ID is assigned when an incoming record triggers the initial task in the workflow. As the record moves from task to task, the same Task ID is maintained. This remains true until the record completes its journey through the workflow. At that point, there will be no tasks in the workflow with that Task ID.

The Worklist Filter provides a mechanism for searching the Worklist by several fields, including task ID, patient set ID, and the record ID of unlinked records (once a record is linked to a patient set, you must search by the patient set ID). Filtering by Task ID, if known, is the fastest and most effective way to follow a record through the workflow. Therefore, it is recommended that you take note of the Task IDs as you do your work.

To facilitate tracking by Task ID, SEER*DMS shows the Task ID at the top of the page during a task.



When you finish a task, a message is displayed at the top of the Worklist, notifying you that the data have been updated and reminding you of the Task ID.

To follow data as you complete a task:

1. Take note of the Task ID. You may copy the task number to the Windows clipboard (highlight the text on the screen with your cursor and press Ctrl-C), or write it down.

2. Use the Worklist Filter to determine where the data are now. Select **View > Worklist**, or click the **Worklist** link on the Home page.

3. By default, only tasks assigned to you are displayed. The record or patient set may have moved forward in the workflow to a task that is not assigned to you. To search among your tasks, tasks assigned to others, and unassigned tasks:

   a. Remove the text in the **User(s)** filter.

   b. Check **Show Unassigned**.

4. Enter the worklist task ID in the Task ID(s) filter. (If you copied the number to your clipboard, click your mouse in the Task ID(s) filter and press CTRL-V to paste the text into the filter.)

5. Click **Apply**. If the task is not found in the worklist, all workflow tasks required to process the record or patient set were completed.

Assigning, Releasing, or Rerouting Tasks

Requires system permission: *worklist_task_reassignment*

When a user opens an unassigned task, the task is assigned to that user's account and will be listed in the **My Tasks** section of their Home Page. Other users cannot access the task unless the task is released or rerouted.

Assigned tasks can be rerouted to a different user or released. The Release feature resets the task to unassigned; the Reroute feature changes the assignment from one user to another. Tasks can only be rerouted to a user with the appropriate system permissions.

To reroute or release an open worklist task:

1. To assign the selected task(s) to another user, select **Task > Reroute**.
   a. Set the **Action** to *Reroute to user*, and select a user name from the pull-down list. The list will only include users who have the system permissions required to open all of the selected tasks.
   b. Enter text into the **Comment** box. This text will be included in the e-mail notification sent to the user receiving the task.
2. To designate the task(s) as unassigned, select **Task > Release**.
3. If you have the *system_administration* permission, *Terminate* and *Restart* will be included on the Task menu (Restart will only be available in tasks related to records, not patient sets). These actions should be used with care (see the *Terminating Tasks* and *Restarting Tasks* sections of this chapter for more information).

To use the Worklist to assign, release, or reroute worklist tasks:

1. Select **View > Worklist** or click the **Worklist** link on the Home page.
2. To release or reroute a specific user's tasks, enter their username in the **User(s)** filter.
3. To modify tasks of a certain type, or to modify a specific task, use the filters to limit the list (as described in the *Searching or Filtering the Worklist* section of this chapter.)
4. Select the task or tasks:
   a. To select a single task, check the box to the left of the Task ID.
   b. To select two or more tasks, use one of the following methods:
      i. To select specific tasks, check the box to the left of each Task ID. You can only select tasks on the same page with this method.
      ii. To select all tasks displayed on the current page, check the box on the top left of the page, adjacent to the **Task** column heading.
      iii. To select all tasks on all pages of the filtered worklist, click **Modify All** and skip ahead to Step 6.

5. Click **Modify**.

6. Set the **Action**:

   a. To assign the selected task(s) to a user, set the **Action** to *Reroute to user*, and select a user name from the pull-down list. The list will only include users who have the system permissions required to open all of the selected tasks.

   b. To designate the task(s) as unassigned, set the **Action** to *Release*.

   c. If you have the *system_administration* permission, *Terminate* and *Restart workflow activity* will be listed as possible Actions. These should be used with care (see the *Terminating Tasks* and *Restarting Tasks* sections of this chapter for more information).

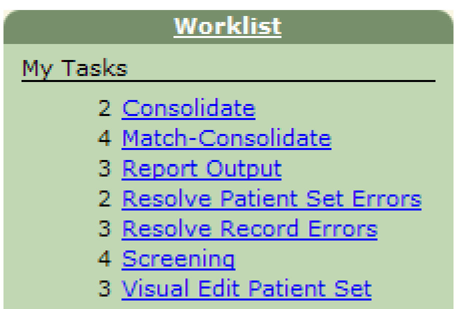
7. Enter text into the **Comment** box. This text will be included in the e-mail notification related to this action.

8. Click **OK**.

9. Each rerouted task will be assigned to the selected user. SEER*DMS will send an e-mail notification to the user, listing the Task ID for each task that is now assigned to that user. Each released task will be designated as unassigned.

Opening a Task Assigned to You

The **My Tasks** section of the Home page summarizes the worklist tasks assigned to you. Only tasks appropriate for your system permissions will be displayed. The number of tasks assigned to you is displayed to the left of the task type. Use the shortcut links to access the worklist; the worklist will be filtered to show the tasks of that type that are assigned to you.



To open a task assigned to you:

1. Open the worklist:

   a. To view all the tasks assigned to you, select **View > Worklist** or click the **Worklist** link on the home page.

   b. To view assignments of a certain task type, click one of the shortcut links in the **My Tasks** box on the home page. (Note: If there is only one task of that type, that task will open automatically.)

2. To reduce the list further, enter search criteria in the filter controls. (See *Searching or Filtering the Worklist* for instructions.)

3. Click **Apply.**

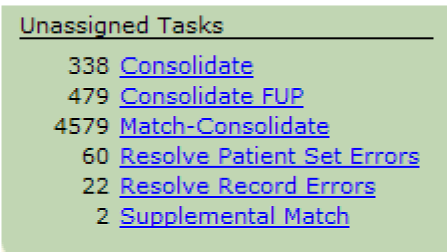
4. To sort the worklist by the data in a column, click on the column heading.

5. To open a task, click on the ID number in the **Task** column. Once you open a task, it is assigned to you and will remain assigned to you until you complete the task or the task is released or rerouted.

Opening an Unassigned Task

System permissions are required to view and access certain task types. (See *Worklist Types* for more information.)

The **Unassigned Tasks** box on the Home page summarizes the unassigned tasks that you are permitted to access, and provides shortcut links for each type of task. Use the shortcut links to access the worklist; the worklist will be filtered to show the tasks of that type that are unassigned.



To open an unassigned task:

1. Select **View > Home**, or click the **SEER*DMS logo** to view the Home page.

2. To view the unassigned tasks of a certain type, click one of the shortcut links in the **Unassigned Tasks** box. (Note: If there is only one task of that type, that task will open automatically.)

3. To reduce the list further, enter search criteria in the filter controls. (See *Searching or Filtering the Worklist* for instructions.)

4. To sort the worklist by the data in a column, click on the column heading.

5. To open a task, click on the ID number in the **Task** column. Once you open a task, it is assigned to you until you complete, release, or reroute it.

Terminating Manual Tasks

System permissions: *system_administration*

You may use the terminate feature to end manual worklist tasks. Instructions for ending automated tasks are provided in the *Viewing or Aborting Automatic Tasks* section of this chapter. The terminate feature should be used with extreme care when modifying tasks that relate to the processing of patient data. The task is ended without forwarding the record or patient set to subsequent processes in the workflow. Terminate is an appropriate method for removing tasks that are unrelated to the processing of patient data, for example, Report Output tasks.

To terminate manual worklist task(s):

1. Select the task or tasks. To search for a task in the worklist, use the Worklist filters as described in the *Searching or Filtering the Worklist* section of this chapter.

2. Specify the tasks to be terminated by checking the box to the left of each Task ID.

3. Click **Modify**.

4. Set the **Action** to *Terminate*.
5. Click **OK**.
6. Click **OK** to confirm. The tasks will be removed from the workflow. SEER*DMS will send an e-mail notification to you.

Restarting Workflow Activity

System permission: *system_administration*

You may use the restart workflow feature to terminate a task and resubmit the focus record to the beginning of the workflow. If a patient set is the focus of a task, the workflow activity cannot be restarted. Therefore, a record cannot be resubmitted to the workflow once it has been linked to a patient set. Only the task's focus record is resubmitted to the workflow. Other records involved in the task are not affected.

Modifications previously made to the record will be retained. Therefore, a record may trigger a Resolve Record Errors task when first loaded but not trigger the task when resubmitted (if the relevant data items were changed).

To restart the workflow activity of incoming record(s):

1. Filter the worklist so that the tasks of interest are displayed in the worklist (see the *Searching or Filtering the Worklist* section of this chapter).
2. Select the task(s) by checking the box to the left of each Task ID.
3. Click **Modify**.
4. Set the **Action** to *Restart workflow activity*.
5. Click **OK**.
6. Click **OK** to confirm when prompted. The selected tasks will be ended and the focus records will be sent to the beginning of the workflow, triggering new tasks. The new workflow tasks will be assigned new Task IDs. SEER*DMS will send an e-mail notification to you indicating the number of records that were resubmitted to the workflow.

Viewing or Aborting Automatic Tasks

System permission: no special permissions are required to view automatic tasks; *system_administration* is required to abort automatic tasks.

When SEER*DMS performs an automated process, an automatic task will appear in the worklist. These items allow users to track the progress of automatic tasks through the workflow, and view additional information about an item, if necessary.

SEER*DMS will run most automated processes quickly, and remove the item from the worklist as soon as the task is completed. However, if a process is taking longer than expected, a user may need to cancel the operation by ending the task as described in *Terminating Tasks* section.

To access an automatic task in the worklist:

1. Select **View > Worklist**, or click the **Worklist** link on the Home page.
2. Only your tasks are displayed. Some automated tasks are assigned to the user who initiated the process. For example, Run Report tasks are assigned to a user. Other

automated tasks are unassigned. To view all automated tasks, clear the search text in the **User(s)** filter and check the **Show Unassigned** box.

3. Scroll down the list in the **Type(s)** filter. Automatic task types are displayed at the bottom of the list in grey. Select one or more task types to display.
4. Click **Apply.** The worklist will be filtered to display only the selected automatic task types. (The Task IDs for automatic worklist tasks are displayed in grey.)
5. Click the Task ID to view additional information about an item.
6. If you determine that this operation needs to be canceled, click **Abort Task**. Otherwise, click **Close** to return to the worklist.

System Failure Tasks

System permission: the permission required to perform the task is also required to view a System Failure spawned by that task; no permissions are assigned to automated tasks for processing records moving through the workflow.

A System Failure task will be created if SEER*DMS is unable to perform a process. Open the task to view the name of the workflow activity, the time and date that the activity was started, and the runtime exception generated. If you determine that the failure was due to a temporary problem such as a database deadlock, you may **Retry** the activity. If you believe that a system flaw caused the problem, report the System Failure to the SEER*DMS technical support team.

Printing the Worklist

You may print a list of the tasks displayed in the worklist. The list will include all tasks currently selected in the Filter settings. It is recommended that you filter the worklist prior to printing to avoid an excessively large print job. There are several reports related to tasks in the worklist and worklist tasks that have been completed. See the *Workflow Reports* section of this chapter for more information.

To print the worklist:

1. Select **View > Worklist**, or click the **Worklist** link on the Home page.
2. Use the **Filter** controls to select the worklist items that you would like to print. (See *Searching or Filtering the Worklist* for more information.)
3. Click **Print.** SEER*DMS will generate a system report in a PDF file (RPT-040A).
4. Depending on your browser settings, you may be prompted to **Open** or **Save** the report. If so, click **Open**. The PDF will open in an Adobe Acrobat window.
5. Use the Adobe controls to print or save the worklist report; and close the Adobe window.

Worklist Tasks

The task types shown in the worklist are listed in the following tables. Each manual task is initiated when an automated task cannot be completed without human intervention. The Automated Tasks listed here are the tasks which are triggered by a system user but completed in automated processes, for example, when starting a System Task.

Manual Tasks	Function
Consolidate	Combine data from incoming records with data previously loaded into the system (*Chapter 12: Consolidating Data*).
Consolidate FUP	Resolve conflicts encountered during the automated consolidation of follow-up information (*Chapter 16: Follow-up*).
Image Data Entry	Enter record data stored in an image file
Import Review	Review a pre-load analysis of an import in order to identify potential errors prior to loading the records into the workflow (*Chapter 5: Importing Data Files*).
Match-Consolidate	Review possible matches identified for an incoming record (main workflow path). Determine whether the record should be consolidated with an existing Patient Set, or refers to a new Patient Set (*Chapter 10: Matching Incoming Records to Database*).
Non-rpt Rescreening	Review two records that match each other but do not match any reportable records or patient set data. This task is only created if the two matching records are both auditable (not reportable); or if one is auditable and the other is supplemental. Verify the match and determine if the combined data should be used to create a patient set (*Chapter 15: Re-screening of Non-reportable Records*).
Report Output	Access the output of a report that ran offline (*Chapter 24: Creating Reports and Extracting Data*).
Resolve Patient Set Errors	Resolve errors identified in the final automated review of the patient set (*Chapter 14: Resolving Patient Set Errors*).
Resolve Record Errors	Resolve errors which must be resolved prior to screening (*Chapter 8: Resolving Record Errors*).
Screening	Screen an incoming record for reportability (*Chapter 9: Screening for Reportability*).
Supplemental Match	Review possible matches for data that follows the supplemental workflow path. This task is only created if the supplemental match algorithm includes weighted, possible match results.
Visual Edit Patient Set	Review a new patient set that was auto-created from an incoming record (*Chapter 13: Visual Editing*).
System Failure	View information about a process that failed to complete.

Automated Tasks	Function
Automatic Patient Edits	Recalculates the edit errors for a cohort of Patient Sets (*Chapter 14: Resolving Patient Set Errors*).
Execute Build Task	Builds CTCs from non-abstract records (*Chapter 27: System Administration*).
Execute Import	Loading imported data (*Chapter 5: Importing Data Files*)
Execute Import Analysis	Performing the pre-load analysis of an import in order to identify possible potential errors prior to loading the records into the workflow (*Chapter 5: Importing Data Files*).
Execute System Task	Executing one of the utilities or "tasks" that implement processes in batch mode (*Chapter 27: System Administration*).
Run Extract Report	Create data file for a system extract (*Chapter 24: Creating Reports and Extracting Data*).
Run Report	Generating output of a system report (*Chapter 24: Creating Reports and Extracting Data*).
Other Automatic Activities	This allows you to search for other automated tasks not specifically listed in the filter.

Workflow Reports

These SEER*DMS system reports can be used to monitor data and tasks in the workflow.

Report ID	Title	Description
RPT-003A	Tasks for Unlinked Records with Closed AFLs	Lists workflow tasks for unlinked records which are associated with closed AFLs.
RPT-061A	Workflow Location of Imported Records	For each record imported at a specified time, this report lists the current location of the record in the workflow. It is paged by the import data file which contained the original record.
RPT-062A	Workflow Tasks by Facility and Year of Diagnosis	Workflow tasks by source facility and diagnosis year.
RPT-075A	Number of Open Worklist Tasks by Data Type	Number of open, manual workflow tasks by year of diagnosis and data type.
RPT-075A	Number of Open Worklist Tasks by User	Number of open, manual workflow tasks by user account (total, number of unassigned tasks, and number assigned to each user.
RPT-082A	Number of Workflow Tasks Completed (by Task)	The number of workflow tasks completed in a specified time period. This report includes a list of users for each type of task.
RPT-082B	Number of Workflow Tasks Completed (by User)	The number of workflow tasks completed by each user in a specified time period. This report lists the number of tasks per user.
RPT-084A	Summary of Data Entry and Ad hoc Editing	The number of Records and Patient Sets imported via data entry and modified via ad hoc editing.