



# ORIGAMI RISK

**April 2023**

**Client Release Notes**

**Disclaimer**

These release notes cover the whole gamut of offerings from Origami Risk. You may or may not have these options in your system. Also, depending on your User Rights, you may not be able to access some of these features. Lastly, your System Administrator may have changed the way these items are named in your system.

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# April 2023 Client release notes

## What's new?

### New modules

#### Peer review

##### Why

Peer review is a process to evaluate the performance of a peer or 'like' practitioner and can be used in any healthcare organization. For example, a provider or nurse may evaluate the clinical performance of a peer with similar education, training, experience, and skills through a formal process.

This new solution helps you streamline and manage your peer review processes.

##### New solution

This new standard solution manages and tracks your peer reviews and performance improvement plans within your organization.

- **Peer review case types** are used to categorize your peer review cases. The solution is pre-loaded with three starter case types: Provider, Nurse, and Resident. You can add your own peer review case types, as needed.
- **Peer review cases** are used to manage multiple individual peer reviews related to a single case, all on a single record. You can add your own case types and individual review types, as well as create custom forms to match your new types. For example, you can create a form that is specific to each provider's role, like anesthesiologist or surgeon.
- You can add **committees** into your review process, for example, a Peer Review Committee, Medical Executive Committee or Nursing Leadership Committee. **Committee members** can be assigned as a team or as an individual. Committee members enter their findings and next steps, as well as create a performance plan, if needed.

Peer review has standard workflows to help guide your peer review coordinator, reviewer(s), and committee(s) through the process. Also included are templates to create notification letters.

You can configure this solution to match your organization's specific peer review workflow, review types, reviewer types, case types, and even the questions asked during the reviews. You can also set up automated processes that include mail merge functionality, to send letters of finding, for example. You can further have your system configured to integrate the `PeerReviewCases` domain with other domains, such as Incidents.

#### Users in this Solution

<b>Peer review coordinator</b> (users)	<ul style="list-style-type: none"> <li>• Initiates peer review cases and individual peer reviews.</li> <li>• Assigns peer reviews to reviewees.</li> <li>• Assigns peer review case to committee members.</li> </ul>
<b>Reviewer</b> (user assignment)	Completes assigned Peer review
<b>Committee member</b> (user assignment, user assignment teams)	<ul style="list-style-type: none"> <li>• Meets to review results of individual peer reviews.</li> <li>• Decides on next steps (secondary committee, performance improvement plans, etc.)</li> </ul>
<b>Reviewee</b> (peer review)	<ul style="list-style-type: none"> <li>• Healthcare professional being reviewed.</li> <li>• Healthcare professional being assigned a performance improvement plan.</li> </ul>

#### Inherited Permissions

<b>Reviewer</b> (users and external assignees)	Can access only the individual peer review record.
<b>Peer Review Coordinators</b>	Can access all related peer review, performance improvement plan records, and other relevant committee sections for the assigned peer review case.
<b>Committee Member</b>	Can access all related peer review and performance improvement plan records for the assigned peer review case

### Screens

The **Peer Review Case** screen:

Peer Review Cases >
Save Changes Cancel

**Peer Review Case #:**

---

**Peer Review Case Overview**

Case Number: \*

Case Type: \*

Case Status:

Peer Review Coordinator:

Case Trigger:

Case Referral Date:

Case Start Date:

Location:

Case Summary:

---

**Peer Review Committee**

Practitioner Response:

Case Action:

Committee Comments:

Committee Date:

---

**Medical Executive Committee**

Medical Executive Committee Action:

Reason for More Information or Additional Action:

Peer Review Case Close Date:

Medical Executive Committee Chair:

Medical Executive Committee Date:

---

**Incident Summary**

---

**Peer Reviews**

[+ New Peer Review](#)

Peer Review Number	Reviewee Name	Reviewer	Assigned Date	Status
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**Performance Improvement Plans**

[+ New Performance Improvement Plan](#)

Plan Number	Name	Peer Review Case Number	Start Date	Deficiency Category	Entry User
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The **New Peer Review** screen:

**New Peer Review**

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**Overview**

Peer Review Number: \*  Empty to autogenerate

Peer Review Status:

Peer Review Coordinator:

Peer Review Case Type:

Peer Review Type:

---

**Incident Report Overview**

Incident Number:

Incident Type:

---

**Reviewee Information**

Reviewee Name:

Reviewee ID Number:

Reviewee Department:

Reviewee Role:

Specialty:

---

**Clinical Findings**

What usually happens?

What should happen?

Why did it happen?

Overall Ability:	Excellent	Above Average	Average	Below Average
Patient Care:	Excellent	Above Average	Average	Below Average
Medical Knowledge:	Excellent	Above Average	Average	Below Average
Practice Based Learning:	Excellent	Above Average	Average	Below Average
Interpersonal & Communication Skills:	Excellent	Above Average	Average	Below Average
Professionalism:	Excellent	Above Average	Average	Below Average
System Based Practice:	Excellent	Above Average	Average	Below Average

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**Breach of Duty**

Was there a breach of duty?

If yes, what type of duty?

What caused the breach?

If the breach was due to error or at-risk behavior, was there any indication that a system issue may have contributed?

If a system issue was identified, to whom should this be referred?

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**Peer Review Summary**

Physician Comments:

Preliminary Finding:

Physician Name:

Physician Signature Date:

The **User Assignment** screen:

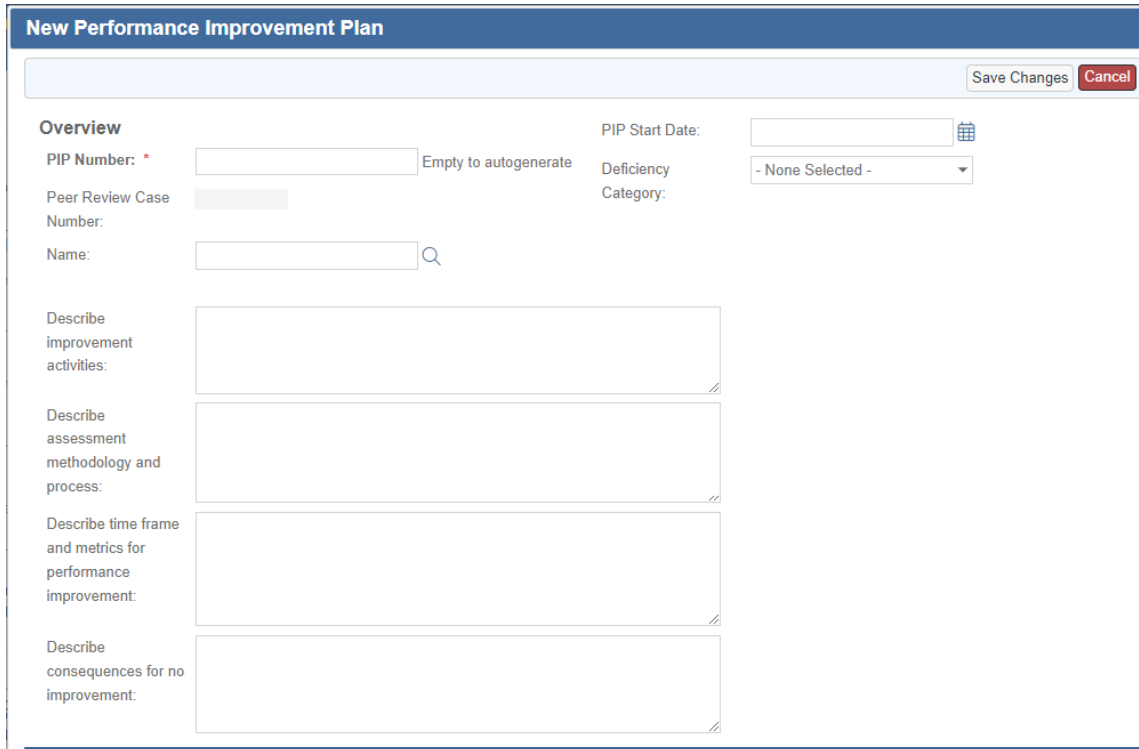
This screen is used to assign committee members.



The screenshot shows a window titled "User Assignment for Peer Review Case - Peer Review Case # [ ]". At the top right are "Assign" and "Cancel" buttons. Below is a form with the following fields:

- Assignee Type: \* [Named User] (dropdown)
- User: \* [ ] (text input with search icon)
- End Date: [ ] (calendar icon)
- Read-Only: [- None Selected -] (dropdown)

The **Performance Improvement Plan** screen:



The screenshot shows a window titled "New Performance Improvement Plan". At the top right are "Save Changes" and "Cancel" buttons. Below is an "Overview" section with the following fields:

- PIP Number: \* [ ] Empty to autogenerate
- Peer Review Case Number: [ ]
- Name: [ ] (text input with search icon)
- Describe improvement activities: [ ] (text area)
- Describe assessment methodology and process: [ ] (text area)
- Describe time frame and metrics for performance improvement: [ ] (text area)
- Describe consequences for no improvement: [ ] (text area)
- PIP Start Date: [ ] (calendar icon)
- Deficiency Category: [- None Selected -] (dropdown)

## System administrators



When our system adds new fields to a form, they are only added to the default form. If you have edited the **view mode** or **edit mode** form, your custom version of the form will not be updated. To use a new field, add it manually to your custom **view mode** or **edit mode** form in **Admin > Custom Forms**.

## System-wide administration

### New status options available for review user assignments

#### Previously

The only status options for review user assignments are **Approve** or **Reject**. This can still be true.

#### Now

When this option is activated, review user assignments now also have the **Save Draft** and **Request More Information** status options that can be enabled across any or all domains. When using **Request More Information**, a comment is mandatory to outline the change needed.



If you want to use this feature, see your Origami Service Administrator to update your system settings.

### Use advanced search to filter user assigned actions, inventory items, and reviews by their parent domains

#### Previously

You could not use advanced search to filter user assigned actions, inventory items, or reviews by their parent domain. For example, you could not create a data entry event to only fire for specific inventory items on a vehicle record.

## Now

You can now use advanced search to filter user assigned actions, inventory items, and reviews by their parent domain. These related records work bi-directionally, and will show up in the related records list for the parent domain and the child domain. The new related domains include:

- **User Assigned Actions:** Document Controls, HFMEAs, RCAs
- **Inventory Items:** Chemicals, Assets, and Vehicles
- **Reviews:** any domain that uses Data Entry Events

## How and where

The advanced search functionality is accessible from many places in the system, including reports, widgets, DEEs, etc.

For example, you can add a filter to an inventory item DEE for a vehicle.

1. Go to **Admin > Data Entry Event** and select **New Data Entry Event**.
2. Select the area: **Vehicles**
3. In the **Condition** or **Triggered by User Condition** section, select **Edit Filters**
4. On the **Advanced Search** window, enter `Inventory Items List` in the **Select a Field** drop down list.

Since related records work bi-directionally, you can also add a filter to the *Parent* vehicle DEE for an inventory item.

1. Go to **Admin > Data Entry Event** and select **New Data Entry Event**.
2. Select the area: **Inventory Item**
3. In the **Condition** or **Triggered by User Condition** section, select **Edit Filters**
4. On the **Advanced Search** window, enter `Parent Vehicle` in the **Select a Field** drop down list.

## Assets administration

### Edit the asset type screen

#### Previously

When creating new assets, the selection screen for **Select Asset Type** was not configurable.

**Now**

On the **Custom Forms** screen, you can use XML to customize the default selection screen for an asset type.

**How and where**

1. **Admin > Custom Forms**
2. Select the form set.
3. Select the **new form** or **edit form** of the **Select Asset Type** form.

## Audits administration

### Create an audit response form snippet using the `AuditDefinition` element

**Previously**

You couldn't create form snippets using Audit Definition XML elements.

**Now**

You can now show audit definitions on an audit response form snippet using the `AuditDefinition` form XML element.

## How and where

### Create the form snippet

1. **Admin > Custom Forms**
2. Select the form set.
3. From the **More** menu, select **Form Snippets**.
4. Select **New Form Snippet**.
5. In the **Create New Form Snippet** screen, select any type of snippet.
6. Select the snippet area: Audit Responses.
7. Click **Continue**.
8. Add the `AuditDefinition` element to the **Content** field.



For help using form XML, click **Go to XML Syntax Help** on the right of the **New Form Snippet** screen.

### Add the form snippet to your custom audit definition form

1. **Admin > Custom Forms**
2. Select the form set.
3. Select the the **Select Audit Definition** form's **new** or **edit form**.
4. From the top right side of the screen, drag the snippet onto the form.

## Chemicals administration

### Add the document controls grid to an anonymous collection link

#### Now

You can now show the document controls grid to external users when they submit a chemical on-line using an anonymous collection item. This allows external users to attach a safety data sheet to their online chemical submission.



This functionality is currently only available in the chemicals and safety huddle domains.

#### New fields

This new field is on the ***New Collection link Item*** screen.

<b><i>Include Associations Panel</i></b>	
	Indicates if an external user can add document controls to their chemical through the anonymous collection online link.

#### How and where

1. Go to ***Anonymous Collection Links > Add Collection Item***
2. Select ***Include Association Panels***.

### Automatically create and publish a document control for a chemical

#### Previously

To link a document control to a chemical, you had to first create both the chemical and document control, then separately link them, and finally publish the document control. This multi-step process is useful, for example, when you want to attach a Safety Data Sheet (SDS) to the chemical that is also available publicly in the repository.

## Now

You can now automate this process by adding new fields to the **Edit Chemicals** screen.





This automated process only works for chemicals that do not already have an associated document control.

You can also map fields from your chemical record to your new document control using an auto-fill mapping set. This auto-populates fields on the new document control with the chemical data.

## New fields

These fields are on the **Edit Mode** of the **Default for Chemicals** form.

<p><b>Document Control Creation Trigger</b></p>	<p>Indicates the system will automatically upload a document control for this chemical.</p> <div data-bbox="715 902 1434 1014" style="border: 1px solid #00aaff; padding: 5px;">  If you clear this check box, the fields below will be disabled.                 </div>
<p><b>Document Control Type</b></p>	<p>Indicates the document control type of the new document control. This field is optional.</p>
<p><b>Document Control File</b></p>	<p>Indicates the file used to create the document control.</p> <div data-bbox="715 1193 1434 1305" style="border: 1px solid #00aaff; padding: 5px;">  If you select a document control type, this file should be the same type.                 </div>
<p><b>Document Control Title</b></p>	<p>Indicates the title used for the new document control.</p>
<p><b>Document Control Folder</b></p>	<p>Indicates the folder where the new document control is stored in the repository.</p>
<p><b>Document Control Auto Fill Mapping Set Name</b></p>	<p>Indicates the auto-fill mapping set used when mapping the chemical record to the new document control. This field is optional.</p>



## How and where

### Add the fields

1. **Admin > Custom Forms**
2. Select the form set.
3. Select the **Edit Mode** of the **Default for Chemicals** form.
4. Create a new section called something like: Document Control Creation.
5. Add the new fields to this section.

### Create an auto-fill mapping set

- **Admin > Auto Fill Mappings**

## Automatically create and publish a document control for a chemical

1. Go to **Chemicals > New Chemical** (or open an existing chemical.)
2. On the **New Chemical** screen, in the **Document Control Creation** section, fill in the new fields.



If the chemical already has a document control attached, the new fields will be disabled.

3. When you select **Save Changes**, the system automatically creates the new document control, auto populates fields with the chemical data (if you entered a mapping set), sets the document control to "Open Repository Access", and then publishes it to the repository.



You can see the new document control in the **Document Control** section on the **View Chemical** screen.

## Custom forms administration

### Add auto-save options to editable grids

#### Now

You can now add a new attribute to editable grid panels that changes the save behavior when users move to a new record or close the window.

#### New attributes

`AutoSaveCurrentRecord`

Determines the save behavior when a user moves off of the current record. This includes closing the window, clicking off the record, and moving to the next record.

**Disabled:** (default) The data is not saved until the **Save** button is manually selected

**Enabled:** The system will auto-save the current record when the user moves off of the record.

**Enabled with Prompt:** The system will prompt the user to save the current record when the user moves off of the record.



This can only be used with `editableGrid="true"`.

#### How and where

1. **Admin > Custom Forms**
2. Select your form set.
3. Select the edit/view form to update.
4. After the attribute: `editableGrid="true"`, add:  
`autoSaveCurrentRecord="<Value>"`
5. Click **Save Changes**

#### Help in the system

The "Help on Forms XML" Mini Help Guide has been updated to include the new attribute in the `<gridPanel> Element` section. View the Mini Help guide here: **Admin > Custom Forms > Select your Form Set > More > Help**

## Add a related record panel on a form using the new `<inlineFormPanels>` attributes

### Previously

It was difficult to display details from a related record on a form. You had to use `<relatedField>` tags or custom fields. For example, to display incident details on the **Incident Investigation** screen, you defined each field from the incident that you wanted to display.

### Now

You can now use the new `<relatedDocument>` attribute of the `<inlineFormPanels>` element to show either the first panel or the entire related record's screen on your form.

### New attributes

These are attributes of the `<inlineFormPanels>` element.

<code>&lt;relatedDocument&gt;</code>	Indicates which domain you want to pull the form from.
<code>&lt;title&gt;</code>	The title used for the new panel.  This attribute can only be used with the <code>&lt;relatedDocument&gt;</code> attribute.
<code>&lt;enableExpandCollapse&gt;</code>	Indicates the panel is expandable/collapsible. This attribute can only be used with the <code>&lt;relatedDocument&gt;</code> attribute.
<code>&lt;expandByDefault&gt;</code>	Indicates the panel is expanded when the screen is first opened. This attribute can only be used with the <code>&lt;relatedDocument&gt;</code> attribute.
<code>&lt;firstPanelOnly&gt;</code>	Indicates that only the first panel of the related form is shown. This attribute can only be used with the <code>&lt;relatedDocument&gt;</code> attribute.

### How and where

See detailed instructions in the "Help on Forms XML" Mini Help Guide.

1. **Admin > Custom Forms**
2. Select your form set
3. From **More**, select **Help**

## Dashboards administration

### Delegate dashboard permissions using dashboard access groups

#### Previously

Dashboard access was controlled by a shared field with options of private, fully shared or shared with a specific role.

#### Now

Dashboards now have access group functionality. This means that dashboards can now be placed in folders that each have their own set of permissions within the access group.

- Each folder has the following access levels: **Full** (gives you all permissions), **View**, **Create**, **Edit**, and **Delete**.
- If you select **Create**, **Edit** or **Delete**, users will automatically get **View** as well.

#### New Screen

**New Dashboard Access Group**
Save Changes Cancel

**Dashboard Access Group Details**

Display Name: \*

Description:

Full Access: \* No ▼


Can Access Dashboards In No Folder: \* No ▼

<b>Full Access</b>	Yes – Group permissions are not shown as you have full access No – Group permissions are shown and can be set per access group
<b>Can Access Dashboards in No Folder</b>	Yes – Users can see any dashboard without a folder set (all dashboards) No – Users cannot see dashboards without a folder

### New role permissions

This account-level permission is in the **Administration - Users and Security** area.

<b>Manage Dashboard Access Groups</b>	This role can manage and setup dashboard access groups.
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This permission exists on top of any existing dashboard and user role permissions. Any prior permissions for dashboards will still apply. If a user doesn't have **edit** permissions, they will not be able edit, even if you grant **edit** access within your access group.

### How and where

#### Update the relevant permissions

1. From the **Gear** menu, select **Account:...** to access the account-level settings.
2. Go to **Admin > Roles** and select the role to update.
3. Select **Only Apply Filter to Area Names selected** and search for: **Administration - Users and Security**
4. Update the **Manage Dashboard Access Groups** permission.

#### Create a Dashboard Access Group

1. **Admin > Dashboard Access Groups**
2. Select **New Dashboard Access Group**
3. Fill in required fields


### Add a Dashboard to an Access Group

1. From a dashboard, select **Edit Dashboard**
2. Select **Edit Settings**
3. In settings, select the **Dashboard Folder**


**Name: \***   
**Description:**   
**Theme:**   
**Shared: \***   
**Dashboard Folder:**

**Interactive Options**

Allow users to view dashboard as another user. ⓘ  
 Use Interactive Options or Global Filter


 If a dashboard access group is applied when you already have a default or assigned dashboard, you will not have access to your default/assigned dashboard. Instead, you will be directed to a landing page, like below, where you can select a dashboard from a list of your available dashboards.

**Dashboards**


 Cannot find or access Dashboard #  You may no longer have view access to this Dashboard. Select from the Dashboards you have access to below.

Name ▲	Description	Created By	Shared
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Data entry events (DEE) administration

### Add data entry events and notification triggers in the Projects domain

#### Now

Data entry events and notification triggers are now enabled and available for the Projects domain.

#### How and where

1. **Admin > Data Entry Events**
2. Select **New Data Event**.
3. Select the **Event Area: Projects**

## Create a DEE to trigger when you associate two records from different domains

### Previously

When you associated two records together it was not possible to trigger a data entry event.

### Now

You now have the ability to create data entry events for the Links domain allowing you to trigger events when records from defined domains are associated or disassociated, for example, you can trigger a DEE when a document control is associated with a chemical.

### How and where

1. **Admin > Data Entry Events**
2. Select **New Data Entry Event**
3. Select the **Links** event area
4. In the **Condition** section, click **Edit Filters**
5. Select the parent domain and the child domain that will trigger this DEE when they are associated. Using the example above, you would select `Chemical` as the parent domain and `Document Control` as the child domain.

## Create a new DEE when the last user assigned action (of the same assignment type) is complete

### Now

You can now create a data entry event that runs when the last active user assigned action, with the same assignment type, is complete for a record.

For example, you have a document control with 3 reviewers assigned to it. The new **All Actions Finished For Assignment Type** option allows you to create a DEE that fires after the 3rd and final review is completed, not each time a review is completed.

### New fields

This new field is on the **Edit Data Entry Events** window.

<b>All Actions Finished For Assignment Type</b>	Indicates the DEE will run when the final user defined action of the same assignment type has completed.
---	--

### How and where

1. **Data Entry Events > New Data Entry Events**
2. Select the area: **User Assigned Action**

## Create a user assignment action in a DEE

### Previously

User assignments can be created manually from the **User Assignments** sections on **View** forms. This is still true.

### Now

You can now also create user assignments automatically using the new DEE action **New User Assignment**. This supports the following:

- Standard assignee types, including, Contact, Employee, User, External, and Team.
- Dynamic assignee types. These allow you to dynamically create an assignment based on User, Employee, Contact, or Email fields.
- Standard form tag syntax (see help on the screen for instructions).



This feature is only available in domains with user assignments. This includes: Document Controls, Document Templates, RCAs, HFMEAs, Peer Reviews, Engagement Requests, and MOC Requests domains.

### How and where

1. **Admin > Data Entry Events**
2. Select an event area that uses user assignments. (See note above for a list of areas.)
3. Fill in the values then click **Save**.
4. On the **Data Entry Event** screen, in the **Actions Triggered by Event** section, select **New User Assignment** from the **Create a new action** drop down list, on the right.



## Data import center administration

### Import broker office data

#### Now

You can now import data into the `BrokerOffices` domain with the new "Broker Offices" import spreadsheet template.

#### How and where

1. **Admin > Data Import Center**
2. In the right side panel, in the **Additional templates** section, search for: `Broker Offices`

### Import and export inventory and inventory items

#### Now

You can now import inventory and inventory items via the data import center. You can also export inventory and inventory item records using the data import center format.

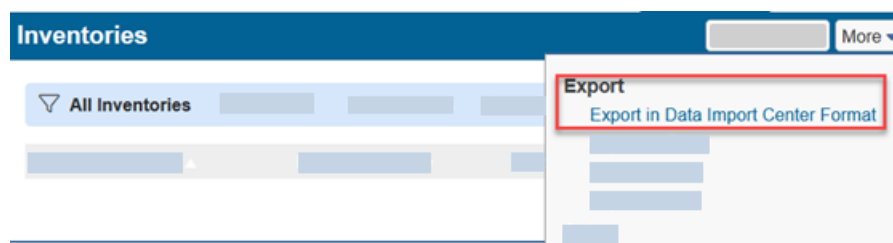
#### How and where

#### Import inventory or inventory items

1. **Admin > Data Import Center**
2. In the right side panel, in the **Additional templates** section, use one of the new templates: **Inventories** or **Inventory Items**.

#### Export inventory or inventory items

1. Open the **Inventories List** or **Inventory Items list**.
2. From the **More** menu, select **Export in Data Import Center Format**



## Document controls | Policies and procedures management (PPM) administration

### Limit linked files when exporting document controls

#### Previously

When you batch exported document controls, you could not select which linked files to export. For example, if you had a published document, the system would export all versions of the document instead of just the most recent one. You also couldn't exclude linked files from the export.

#### Now

You can now decide which files to export with your document control using two new batch processes keys: `OnlyMostRecentDocumentControl` and `ExcludeLinkedFilesOnDocumentControl`.



If the `ParentType Key` is *not* set to `DocumentControl`, the system will ignore these batch processes keys.

**New Process Keys**

`OnlyMostRecentDocumentControl`

True: Only the most recent version of a published document is exported.

False: All versions of a published document are exported.

The default setting is False.



This setting does not determine if directly linked documents are excluded.

For this, use the Key:

`ExcludeLinkedFilesOnDocumentControl`.

`ExcludeLinkedFilesOnDocumentControl`

True: Any files directly linked (uploaded and attached) to a document control are not exported.

False: All linked files are exported.

The default setting is False.



This setting does not determine if published files are excluded. For this, use the Key:

`OnlyMostRecentDocumentControl`.

**How and where**

1. Go to **Admin >Batch Processes** and open a batch process.
2. From the **More** menu, select **Origami Document Export**

**Add the new process keys to an existing batch process**

1. Go to **Admin >Batch Processes** and open a batch process.
2. Select **Edit Batch Process**
3. Copy and paste this information into your process parameters:

```
<!-- These settings only apply when parent type is
DocumentControl -->

<add key="ExcludeLinkedFilesOnDocumentControl" value="false"
/> <!-- If true, excludes any linked files from being
exported and only exports published files in the filter. -->

<add key="OnlyMostRecentDocumentControl" value="true" /> <!--
- If true, only exports the most recent version of each
Document Control from the filter. -->
```

## Engagement requests administration

### 15 new custom fields in the Engagement Requests domain

**Now**

The following custom fields are now available in the `EngagementRequests` domain:

- 15 custom Employee fields

**How and Where**

**Admin > Custom Forms**

### Add an engagement request type

**Now**

You can now add engagement request types directly to the code table. The system will automatically create a new custom form for each new engagement request type.

## How and where

### Add an Engagement Request Type

- **Admin > Code Tables > Engagement Request Types**
  - When you create a new engagement request type, the system automatically creates a new custom form named the same as the new engagement request type.
  - The new form will be identical to the new engagement request screen until you modify it to suit your needs.

### Edit an Engagement Request Type custom form

1. **Admin > Custom Forms**
2. Select the form set.
3. Go to the `Engagement Requests` section. All new **Engagement Request Type** forms will be in this section.

## Assign engagement request reviews to users or teams

### Previously

Review user assignments can only be created on document controls and document templates. This can still be true.

### Now

When this option is activated, you can see the **Edit Assignments** and **Review Assignments** sections on engagement requests. You can also assign reviews to users or teams.

Review forms can be created where you can create a custom form that is shown for reviews. This allows you to decide the information that is shown to users and is the default form used.



If you want to use this feature, see your Origami Service Administrator to update your system settings.

## External access administration

### Customize the payment confirmation screen for online payments

#### Now

You can now customize the payment confirmation screen when users make an online payment through an external access link.

#### New Fields

These new fields are on the **Invoice Payment** screen, in the **Payment Confirmation** screen.

<b>Title</b>	The title text displayed on the <b>Payment Confirmation</b> screen.
<b>Text</b>	The text body, displayed under the title, on the <b>Payment Confirmation</b> screen.

#### How and where

1. **Admin > External Access**
2. Open an existing external access type (or click the **New External Access Type** button)
3. In the new **Payment Confirmation** section, customize the look of your payment confirmation screen.

## Job safety analysis (JSA) / Lockout tagout (LOTO) administration

### Create custom email notifications for the JSA and LOTO approval process

#### Previously

JSA and LOTO have automatic email notifications that are sent out during the approval process. These emails cannot be removed or changed. This can still be true.

**Now**

When this option is activated, you can create your own email notifications using data entry events.



If you want to use this feature, see your Origami Service Administrator to update your system settings.


## Limit edit access to JSA and JSA request records

**Now**

You can now determine if a user role can edit the JSA or JSA records they create.

**New role permissions**

This account-level role permission is in the **JSA** and **JSA Request** areas.

<b>Edit Mine</b>	Indicates if this role can edit the records they create.
 If you clear this option, this role can not edit the records they create.	

**How and where**



You need to be at the account level.

1. From the **Gear** menu, select **Account:...** to access the account-level settings.
2. Go to **Admin > Roles** and select the role to update.
3. Select **Only Apply Filter to Area Names selected** and search for: JSA
4. Update the **Edit Mine** permission.

## Management of change (MOC) requests administration

### Assign MOC request reviews to users or teams

**Previously**

Review user assignments can only be created on document controls and document templates. This can still be true.

**Now**

When this option is activated, you can see the **Edit Assignments** and **Review Assignments** sections on MOC requests. You can also assign reviews to users or teams.

Review forms can be created where you can create a custom form that is shown for reviews. This allows you to decide the information that is shown to users and is the default form used.



If you want to use this feature, see your Origami Service Administrator to update your system settings.

## Policy and billing administration

### Add a due date for "pay as you go" invoices

**Previously**

The due date for "pay as you go" invoices are based on the **Due Date** setting in the billing profile. (This can still be true.)

**Now**

You can now add a due date specifically for "pay as you go" invoices using the new **Pay as You Go Due Date** field.

**New field**

This new field is on the **Edit Billing Profile** screen, in the **Invoice and Due Dates** section.

<b>Pay as You Go Due Date</b>	The due date for "pay as you go" invoices. This is based on the billing period end date.
-------------------------------	--

**How and where**

- **Admin > Billing Profiles**

### Customize the policy commission adjustment form

**Now**

You can now customize the policy commission adjustment form in **Admin > Custom Forms**



## Reference coverage-level fields on a custom form

### Now

The "field" attribute from the `<select>` element has been updated so you can now reference coverage-level fields on a custom form.

### How and where

See detailed instructions in the "Help on Forms XML" Mini Help Guide.

1. **Admin > Custom Forms**
2. Select your form set
3. From **More**, select **Help**

## Add a disclaimer for online payments

### Now

You can now add a disclaimer to the payment form screen. When this option is activated, the end user is required to select the disclaimer check box before the **Pay Online** button is shown.

### New fields

This new field is on the **Account Settings** screen, in the **Online Payments** section.

<b>Disclaimer</b>	Indicates a disclaimer is required before the end-user can pay. <ul style="list-style-type: none"><li>• When you add information into this field, the disclaimer check box will be required.</li><li>• If you leave this field blank, the end-user can pay without seeing a disclaimer.</li></ul>
-------------------	---

### How and where



You need to be at the client level.

1. From the **Gear** menu, select the client account to access client-level settings. (You may already be at the client level. )
2. **Admin > Account Settings**

## Reverse a refund

### Now

When this option is activated, you can reverse a refund, as long as:

- there is no check associated with the refund.
- If there is an associated check, it has been voided or canceled.

After the refund is reversed, you can see the reversal on the original payment record.



Only those refunds which are refunded through checks can be reversed. Online refunds cannot be reversed.

### New role permissions

This new role permission is in the **Member transaction** area.

#### **Reverse Refund**

Indicates if this role can reverse a premium refund. A refund can only be reversed if:

- there is no check associated with the refund.
- If there is an associated check, it has been voided or canceled.

### How and where

1. Open the policy that has a premium refund transaction.
2. In the **Premium Invoices** section, select a refund transaction.
3. From **More** select **Reverse Refund**.



Users will need their permissions updated to use this new functionality

### Update the relevant permissions

1. Go to **Admin > Roles** and select the role to update.
2. Select **Only Apply Filter to Area Names selected** and search for: Member Transaction
3. Update the **Reverse Payment** permission.



If you do not see check boxes on the **Roles** screen, it may be an account-level role. From the **Gear** menu, select **Account:...** then repeat the steps above.

## Reports administration

### Customize the view mode and edit mode of report forms

#### Now

You can now customize the **view mode** and **edit mode** of report forms. This includes requiring additional fields, adding tool tips, changing field labels and more.

#### How and where

**Admin > Custom Forms**

## Risk administration


### Limit edit access to risk records

#### Now


You can now determine if a user role can edit the risk records they create.

#### New role permissions

This account-level role permission is in the **Risk** area.

<b>Edit Mine</b>	Indicates if this role can edit the records they create.
<div style="border: 1px solid #0070C0; border-radius: 10px; padding: 5px; display: flex; align-items: center;">  <p>If you clear this option, this role can not edit the records they create.</p> </div>	

#### How and where

 You need to be at the account level.

1. From the **Gear** menu, select **Account:...** to access the account-level settings.
2. Navigate to **Admin > Roles** and select the role to update.
3. Select **Apply Filter to Area Names selected** and search for: `Risk`
4. Update the **Edit Mine** permission.

## Root cause analysis (RCA) administration

### Add a Five Whys panel or grid to a custom root cause form

#### Now

You now have simpler alternatives to the fishbone diagram for root cause analysis. The new `<rcaFiveWhysPanel>` element adds a Five Whys grid or Five Whys diagram to your custom root cause form. The grid and diagram can be custom styled and, once implemented, is fully interactive. You can add, edit, delete, or reorder your Whys.

#### New elements

<code>&lt;rcaFiveWhysPanel&gt;</code> element	This element displays the root cause's contributing factors as reasons in a 5 Whys diagram or grid for root cause analysis.
--	---

#### How and where

See detailed instructions in the “Help on Forms XML” Mini Help Guide.

1. **Admin > Custom Forms**
2. Select your form set
3. From **More**, select **Help**

## Safety huddles administration

### Add the safety huddle topics grid to an anonymous collection link

#### Now

You can now show the safety huddle topics grid to external users when they submit a safety huddle on-line using an anonymous collection item. This allows external users to attach safety huddle topics to their online safety huddle submission.



This functionality is currently only available in the chemicals and safety huddle domains.

#### New fields

This new field is on the ***New Collection link Item*** screen.

<b><i>Include Associations Panel</i></b>	Indicates if an external user can add safety huddle topics to their safety huddle through the anonymous collection online link.
--	---

#### How and where

1. Go to ***Anonymous Collection Links > Add Collection Item***
2. Select ***Include Association Panels***.

## Tasks administration

### Add the location field to task screens

#### Now

You can now add the Location field to the ***View Mode*** or ***Edit Mode*** of the ***Default for Tasks*** form. Once added, the ***Location*** search field will be available when users view or edit tasks.

#### How and where

***Admin > Custom Forms***

## System users

### System-wide

#### Building facility field list is now limited to the selected location

##### Previously

Locations and building facilities could not easily have dependencies set up between one another.

##### Now

Locations and building facilities now have an implicit dependency, which allows the system to dynamically filter the building facilities to only those matching the selected location.

##### How and where

When a screen includes both **Location** and **Building Facility** fields, you must select the location first, then you can select from the list of associated building facilities.

#### Delete grandchild records of a parent record

##### Previously

When deleting a record, the system would only delete the child records. If there were grandchildren, great grandchildren, etc. records you would get an error, stopping the delete. The workaround was to delete the child records first, then delete the parent.

##### Now

When deleting a record, the system now deletes all child, grandchild, great-grandchild, etc. records as well.

#### Enter a longer member name

##### Now

You can now enter a member name that is up to 250 characters long (up from 100).

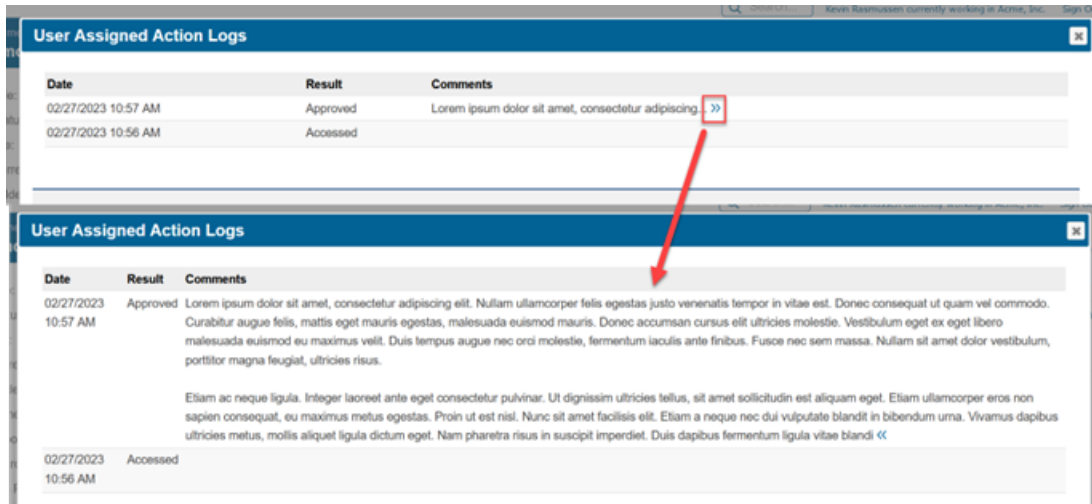
#### Improvements to the user-assigned action log

##### Previously

The **User Assigned Actions Log** screen was displayed in a non-grid form.

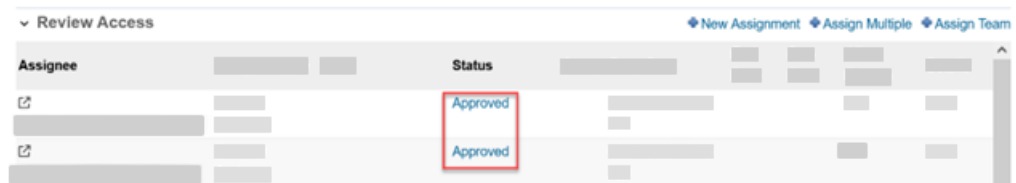
## Now

The **User Assigned Actions Log** screen has been updated to show the information in a grid. Comments are now limited to 1,000 characters. When comments are long, a limited amount is shown in the grid and clicking the double carats expands the full comment.



## How and where

1. From a **Review Access** section, select the status link of an item.



## Require signatures on review assignments

### Previously

You had no ability to collect signatures when performing review assignments.

### Now

When you create a review user assignment, you can now request a signature. When activated, the reviewer must attach a signature before they can complete their assignment. This functionality is available across all domains.

### New fields

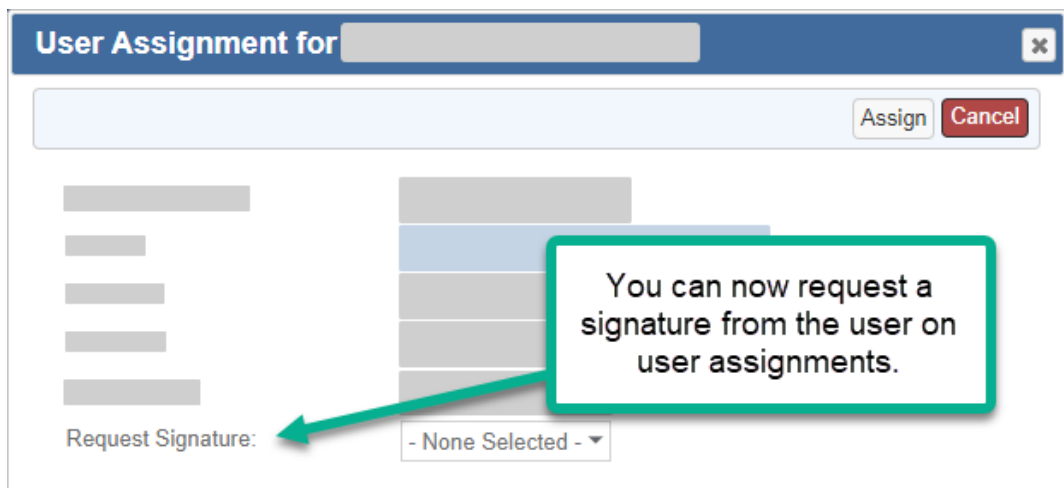
This new field is on the **User Assignment** screen.

<b>Request Signature</b>	Indicates if the user must supply a signature before they can approve or reject a user assignment.
--------------------------	--

### How and where

This works across all domains. As an example, follow these steps for an engagement request:

1. Open an engagement request.
2. In the **Review Access** section, select **New Assignment**
3. On the **User Assignment** screen, select **Yes** in the **Request signature** field.



## Audits

### All invalid audit response questions are shown at top of page

#### Previously

When you submitted an audit response, if required questions were missed or questions didn't pass validation, you received an error saying there were missing questions but no list was provided.



### Now

When you submit an audit response with incomplete or questions that don't pass validation, you are presented with a list of those questions. Each question is displayed as a hyperlink so clicking it will scroll the screen to the question allowing you to easily locate the questions.

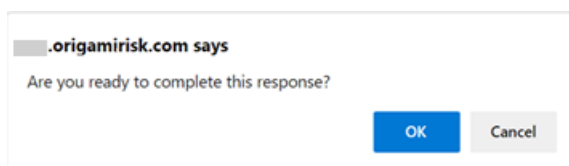
## Audit responses now require verification before completing

### Previously

When you clicked **Save as draft** or **complete** on an Audit Response, you were shown the same **Save successful** message.

### Now

- When you click **Save as draft**, you are still shown a **Save Successful** message.
- When you click **Complete**, you are now shown a pop-up to verify you want to complete the audit response, shown below. When you click **OK**, you receive the **Submit Successful** message.



## Chemicals

### Display GHS pictograms on a chemical

#### Now

When you add this field to your screens you can now see all relevant GHS pictograms for a chemical. This can be displayed on the screen as a column or grid, and also as a dashboard widget.

#### New fields

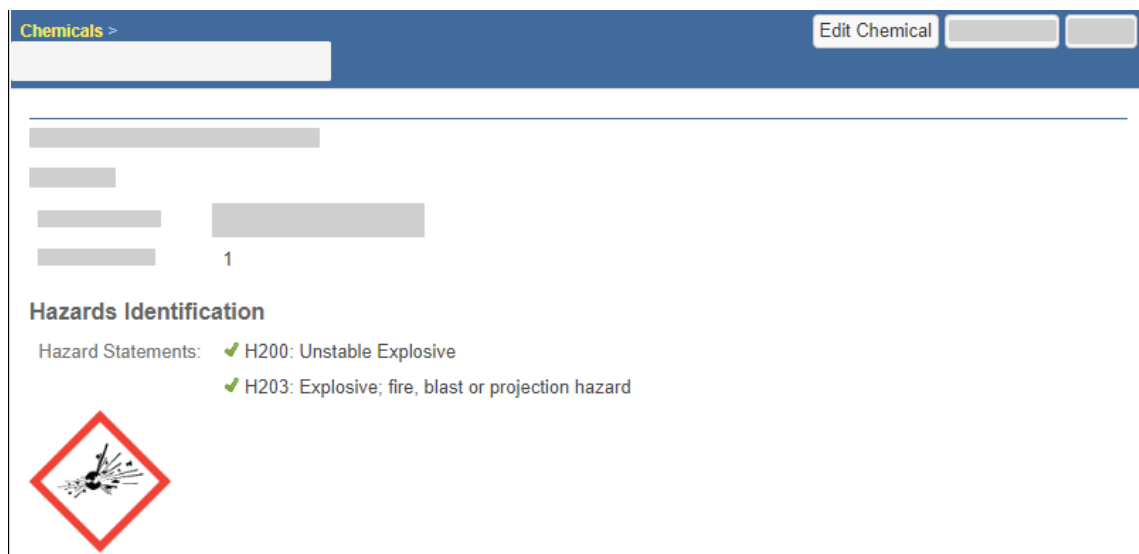
This new field is on the **View/Edit Chemicals** screen.

<b>GHS Pictograms</b>	Contains all relevant GHS Pictograms for the Chemical. This is determined by the selected Hazard Statements.
-----------------------	--

### How and where

#### Add the field directly on the form

1. **Admin > Custom Forms**
2. Select your form set.
3. Open the **Default for Chemicals - View form.**
4. Add this new field to the form.



#### Add the field as a column

1. **Admin > Custom Forms**
2. Select your form set.
3. In the right-side panel, select the Chemical's **Edit** or **New** from the **Search Screen Configuration** section.
4. Add this new field to the **Default Columns** section



### Display the pictograms on your dashboard widget

1. Save a search screen result (also called a "view") that includes the GHS Pictograms column.
2. Add the newly saved view to a dashboard (with the "Add to Dashboard" button). The pictograms now display on your dashboard widget.

## Claims

### Deactivate or reactivate EDI reports

#### Now

You can now deactivate or reactivate EDI reports with these statuses: NEW, TRJ, and TE1. When you deactivate an EDI report, it will no longer show in the EDI Reports list. When you reactivate an EDI report, it will now show in the EDI reports list.



This functionality is *not* available for EDI reports created before January 1, 2023.

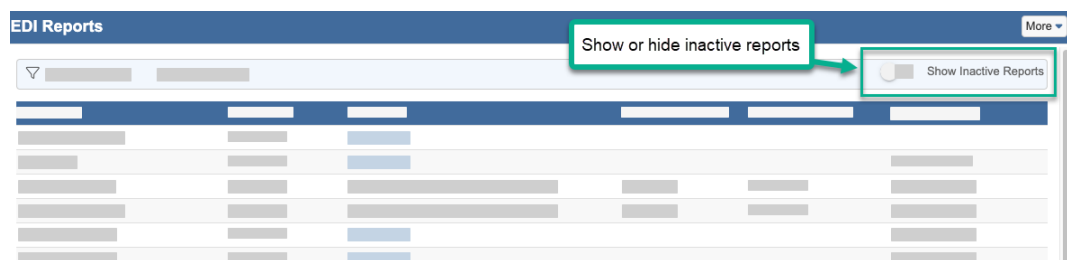
## How and where

### Deactivate an EDI report

1. On the **EDI report list**, open the EDI report that needs deactivated.
  - **More > Deactivate EDI Report**

### View deactivated reports and reactivate an EDI report

1. Open the **EDI Reports list**
2. In the top right of the list, turn on **Show Inactive Reports**



3. Open the report that needs reactivated.
4. **More > Reactivate EDI Report**



You can also access your EDI reports from the **Claims** screen, using the right-hand panel: **EDI Reports**

## Dashboards

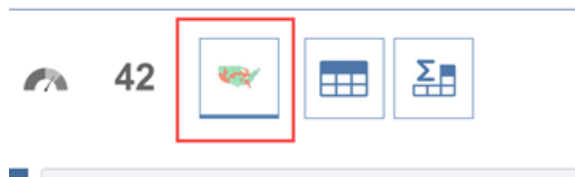
### Add a Canada map to your dashboard

#### Now

The custom widget builder now includes the Canada map.

### How and where

1. Go to the Dashboard.
2. Select **Edit Dashboard > Add Widget > New Widget**
3. Select a dataset.
4. Select a `state` field and a `value` field
5. Select **Map** as the type



6. In the **Display Options** screen, select **Canada** as the **Map Type**.

#### Display Options

**General**

Title:

Subtitle:

Cross-Client:  Once enabled, this cannot be reversed.

Side Stripe:

Low Color:

High Color:

Bottom Limit:

Top Limit:

Map Type: 

- United States
- Europe
- Canada

## Create multiple KPI panels and move them to different locations on your dashboard

### Previously

You were only able to create a single KPI Panel and it was locked at the top of the dashboard page.

### Now

When you add KPI panels to dashboards, they now behave like traditional widget panels. This means that you can create multiple KPI Panels and move them up and down on the dashboard, interspersed with regular panels.

**How and where**

1. From the Dashboard home screen, select ***Edit Dashboard***
2. Click ***Add KPI Panel***
3. click ***Add KPI Card***
4. Add needed cards and KPI Panels
5. Use the ***up*** or ***down*** arrows to move the panel within the dashboard.

**Define decimal places for percents in KPI and custom metric widgets****Previously**

You could format widgets as percentages but were unable to control the number of decimal places shown.

**Now**

You can now set the number of decimal places in percentage widgets to 0, 1 or 2 places.

## How and where

### KPI Card

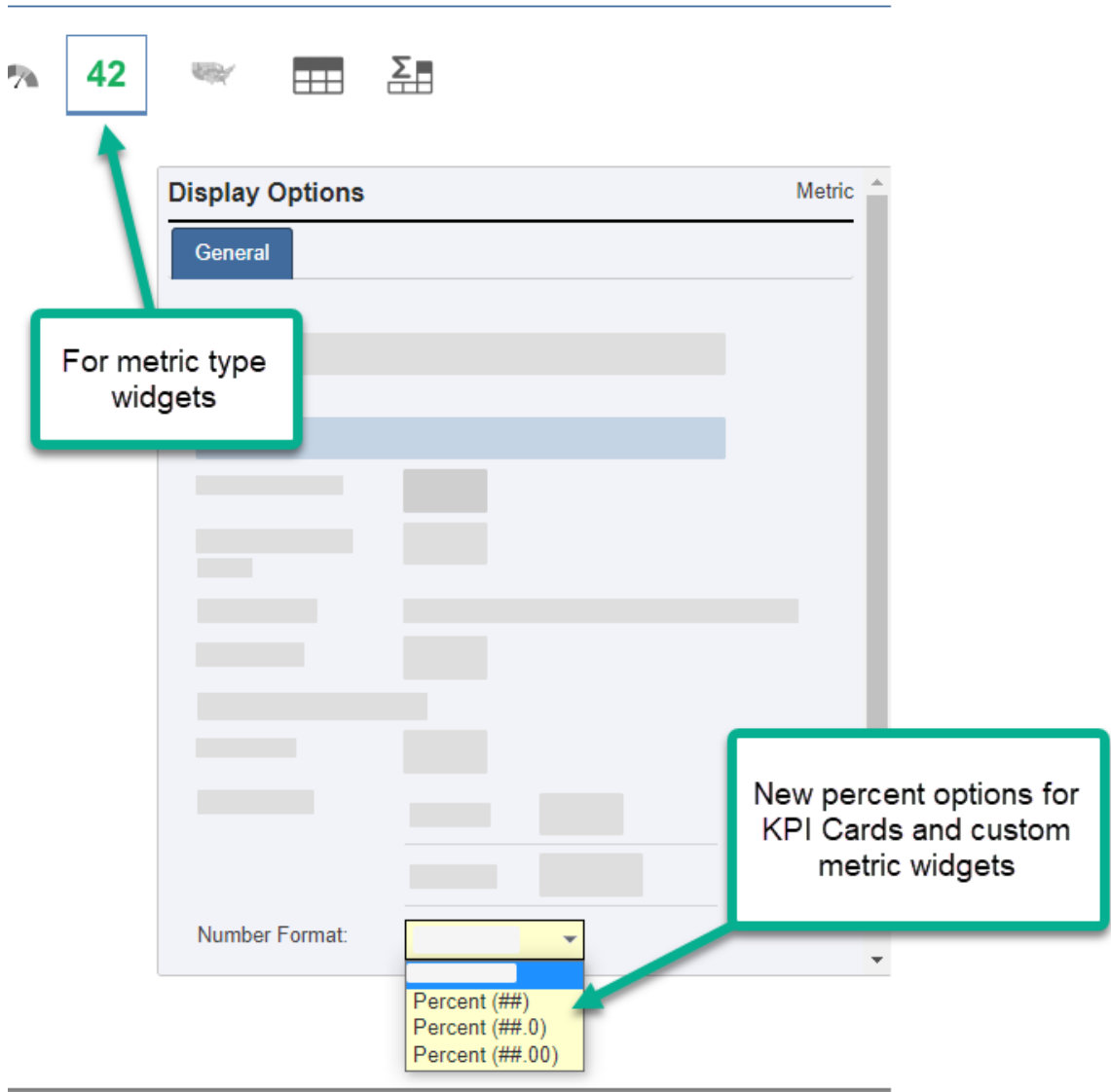
1. Go to Dashboards
2. Select **Edit Dashboard > Add KPI Card > Select Data set**
3. In the **Display options** section, select one of the new options in the **Number Format** field. (See screen shot below)

### Custom Metric Widget

1. Go to Dashboards
2. Select **Edit Dashboard > Add Widget > New Widget > Select Data set**
3. Add value > select Metric widget type



4. In the **Display options** section, select one of the new options in the **Number Format** field. (See screen shot below)



## Show user assignments in the My Notifications widget

### Previously

You needed to access assigned tasks through the email link sent to you at assignment.



**Now**

The **My Notifications** dashboard widget has been updated to allow for user assignments to be displayed. This will show all of your current user assignments displayed as hyperlinks so that when clicked you are able to complete your assignment.

**New fields**

This new field is on the **Edit Dashboard widget - My Notifications** screen.

<b>Include User Assignments</b>	Indicates if user assignments are shown in the My Notifications widget.
---------------------------------	---

**How and where**

1. Go to a dashboard.
2. Select **Edit Dashboard**.
3. Select the **My Notifications** widget and click the **Configure** button
  - If the **My Notifications** widget is not present on the dashboard, add one by clicking **Add Widget** and selecting the **My Notifications widget**
4. On the **Edit Dashboard widget - My Notifications** screen, select **Yes** in the **Include User Assignments** field.

## Document controls | Policy and procedure management (PPM)

### Document controls now automatically lock when editing

**Previously**

Document controls could be edited by multiple users at the same time. This was problematic because only the last user to click “save” would have their changes saved.

**Now**

If one user is editing a document control, any other users that try to access the document will receive a message that says, "This document is currently being edited by another user."

### Document controls now automatically save when editing

**Previously**

If you got distracted and didn’t save when editing a document control, any unsaved changes would be lost.

**Now**

If you do not save, the document will automatically save and close after a set amount of time. (The default time is 10 minutes.)



See your Origami Service Administrator to change the auto-save duration.

## Select an external access type for a document control repository filter

**Previously**

When external users accessed a document control repository filter's link, this could result in a view that showed extra columns or filters that didn't make sense for the documents being shown by the filter.

**Now**

You can now link an external access type to a document control repository filter using a new field.

**New fields**

This new field is on the **Document Control Filter** screen.

<b>External Access Type</b>	Specifies the external access type for the document control repository filter. Any user accessing the filter's external link is presented with the selected external access type's view and information.
-----------------------------	--

**How and where**

1. **Document Controls > More > Manage Filters**
2. Create or select repository filter record

## Document templates | Business continuity management (BCM)

### Add a dashboard widget to a document template element

**Now**

Existing dashboard widgets, including custom widgets and KPI cards, can be utilized and shown within a document template element.

**How and where**

1. Open a document template
2. Select **Create Element**
3. The option to select `Widget` is available.
4. You are then presented with the options to choose a dashboard and a widget from that dashboard.

Create New Element

i
Click on the [Preview](#) link to see the resulting layout before saving.

Element Type: \*  Regular  Widget

Heading:

Dashboard: \*  ▼

Widget: \* Compliance Scores by Rating ▼

**Apply default formatting to a document template**

**Previously**

When copying and pasting text into a document template element, the formatting from the source(s) would be copied in as well resulting in mismatched formatting across the elements of the document.

**Now**

You can now apply default formatting settings to the whole document. This updates all text within the document to have uniform formatting.


**New fields**

This new field is on the **Document Formatting** screen.

**Auto Apply  
Formatting**

- Yes – The formatting is applied to the document once published or when previewing the document. This overrides any current formatting within elements.
- No – The formatting is not applied.



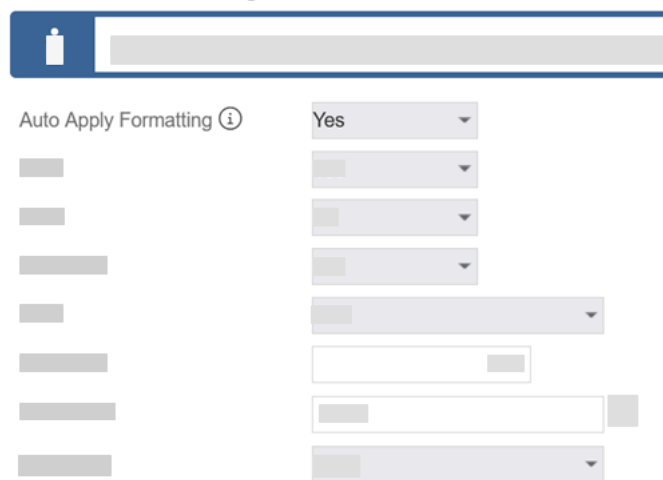
To manually apply formatting to an element, open the element and select the icon  (**Apply Template Format Settings**) on the **Content** toolbar.

## How and where


### Set up Auto-Apply Formatting

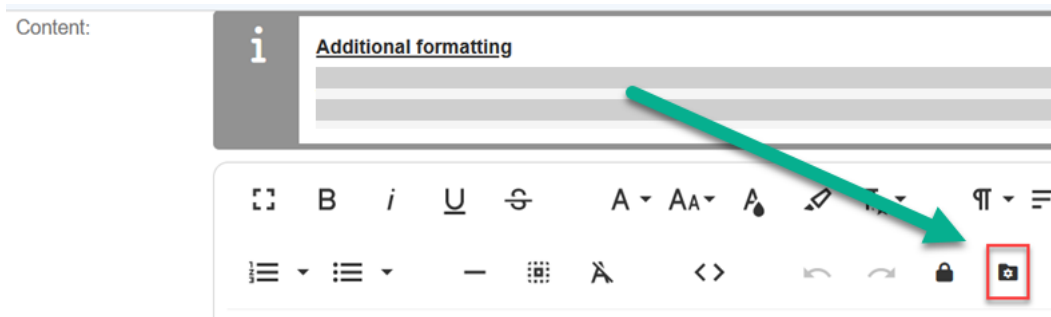
1. Open a document template.
2. Select **Edit Document Template**
3. Under **Document Formatting** set the desired formatting options.
4. Select the **Auto-Apply Formatting** check box to apply these settings to the document once published or previewed.

#### Document Formatting



### Manually apply formatting to an element

1. Open a document template
2. Select an element
3. On the **Content** toolbar, select the button:  **Apply Template Format Setting**



## ERM plans

### Change the owner of any ERM plan

#### Previously

This functionality was only available to the plan owner.

#### Now

With the new **Change Owner** user permission turned on, you can now change the plan owner of any ERM Plan, even if you aren't the current owner. For example, you can use this feature when an employee has left and you need to re-assign their plans to a new employee.

#### New user permissions

This new permission is in the **ERM Plan** area.

<b>Change Owner</b>	The user can change the plan owner of any ERM Plan.
---------------------	---

#### How and where

1. Open the **ERM Scheduled Plans list**.
2. Select the ERM Plan that needs an owner change.
3. Click **Edit Risk Plan**
4. On the **Edit Risk Plan** window, update the **Plan Owner** field.



Users will need their permissions updated to use this new functionality



#### Update the relevant permissions

1. From the **Gear** menu, select **Account:...** to access the Account-level settings.
2. Go to **Admin > Roles** and select the role to update.
3. Select **Apply Filter to Area Names selected** and search for: Insured Transaction
4. Update the **Change Owner** permission.

## External events

### External events now include advanced search, saved views, and search screen configuration

#### Now

In the right -side panel of external events, you can now perform advanced searches and save or favorite custom views. You can also configure default columns and filter fields for external events in search screen configuration.

#### How and where



#### Configure default columns and filter fields

1. **Admin > Custom Forms**
2. Select your form set.
3. In the right-side panel, select the External Event's **Edit** or **New** from the **Search Screen Configuration** section.

## Inventories

### Perform advanced searches and save custom views on inventory items

#### Now

You can now perform advanced searches and saved custom views for inventory items.

## Policy and billing

### Add tasks and contacts to a canceled policy

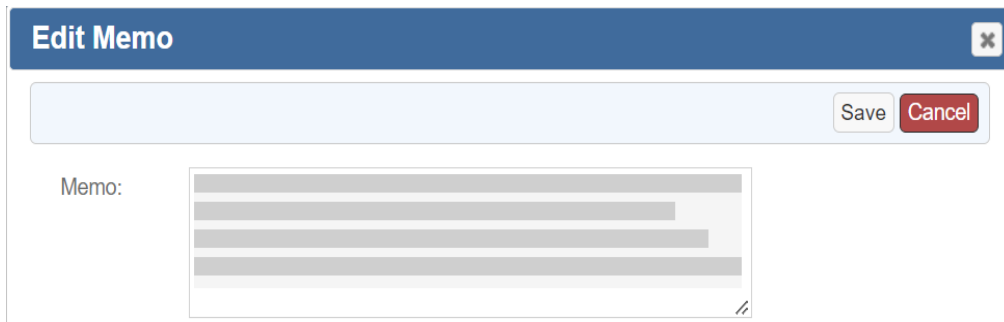
#### Now

You can now add tasks and contacts to a canceled policy.

## Add a memo to a payment that has already been posted

### How and where

1. Open a member transaction that has a paid amount.
2. click **Edit Memo**



The screenshot shows a modal dialog box titled "Edit Memo" with a close button (X) in the top right corner. Below the title bar is a light blue header area containing a "Save" button and a "Cancel" button. The main content area is labeled "Memo:" and contains a text input field with a light gray background and a small cursor icon at the bottom right. The input field is currently empty.



## Notice date and cancellation dates now recalculate based on billing profile rules

### Now

When you edit the due date of an unpaid member invoice, the system now recalculates both the notice date and cancellation dates based on the current billing profile rules.

- The notice date updates based on what is entered in the billing profile's **Grace period** field (in the **Payment Delinquency** section)
- The cancel date updates based on what is entered in the billing profile's **Cancel After** field (in the **Payment Delinquency** section)



If either of these fields are blank on the member transaction, they will remain blank after the due date changes.

### Payment Delinquency

i

Grace Period (i)  Days After Due Date

Cancel After (i)  Days After Grace Period



These settings only affect policies that have **Auto Policy Cancellation** enabled in the rating program.

### How and where

To update rules, navigate to: **Admin>Billing Profiles**

## Manually report payroll on a member transaction prior to billing period end (for UAT only)

### Now

A new role permission allows users to manually report payroll on a member transaction.

### New role permissions

This new role permission is in the *Member transaction* area.

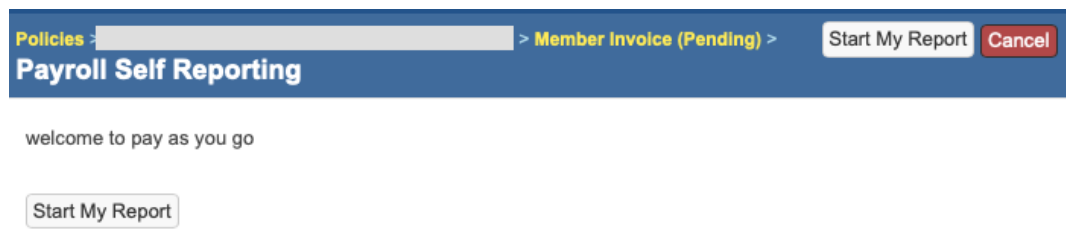
<b><i>Payroll Reporting</i></b>	Indicates if this role can manually report payroll on a member transaction. When selected, the <b><i>Report Payroll</i></b> button will be displayed to users in this role on the <b><i>Member Invoice</i></b> screen.
---------------------------------	--

## How and where

1. **Policy Billing**>**Member Invoice**
2. Click the **Report Payroll** button



3. The **Payroll Self Reporting** screen is displayed.



Users will need their permissions updated to use this new functionality



### Update the relevant permissions

1. Go to **Admin > Roles** and select the role to update.
2. Select **Apply Filter to Area Names selected**, then search for Member Transaction and
3. Update the **Payroll Reporting** permission.



If you do not see check boxes on the **Roles** screen, it may be an account-level role. From the **Gear** menu, select **Account:...** then repeat the steps above.

## Perform advanced searches, save views, and export policy transactions

### Now

You can now perform advanced searches and save views from the right side panel of policy transactions. You can also export your policy transaction view data to Excel, CSV, or PDF.

### How and where

#### Export policy transaction view data

1. Open the **Policy Transactions** list.
2. From the **More** menu, select **Export to Excel**, **Export to CSV**, or **Export to PDF**



When exporting to Excel, you may get an error when Excel has a hard time parsing the `Amount [Format=N2]` column. Manually remove the formatting from that column using the policy transaction's **Search Screen Configuration** screen (**Admin>Custom Forms** on the right-side panel, in the **Search Screen Configuration** section, click on **Policy Transaction**.) When finished, add the formatting back.

## See check information for disbursements in the policy commission section

### Now

When viewing a policy, you can now see the individual check number for each disbursement record in the **Policy Commission** section. When you click on the check number, the check record will be displayed.

## Reverse agency payment transactions at the agency level only

### Previously

You were able to reverse an agency payment transaction from the **Policy Billing** screen by navigating to a payment record, then selecting **More > Reverse Payment Record**

### Now

You can now only reverse agency payment transactions from the agency in the **Agency Billing** screen. Non-agency payments can still be reversed from the **Policy Billing** screen.

## Reverse an unallocated payment at the policy or member level

### Previously

In direct billing and member payments, you were only able to create a reversal payment on payments that were already allocated.

### Now

You can now create a reverse payment on unallocated direct member payments.

### New user role permissions

This new role permission is in the *Insured Transaction* area.

<b><i>Reverse unallocated payments</i></b>	Determines if the user can create a reverse payment on unallocated direct billing and member payments.
--	--

### How and where

1. Open an unallocated payment.
2. From **More**, select **Reverse this Payment**.



Users will need their permissions updated to use this new functionality



### Update the relevant permissions

1. Go to **Admin > Roles** and select the role to update.
2. Select **Only Apply Filter to Area Names selected** and search for: Insured Transaction
3. Update the **Reverse Unallocated Payments** permission.



If you do not see check boxes on the **Roles** screen, it may be an account-level role. From the **Gear** menu, select **Account:...** then repeat the steps above.

## See more of the policy number on the payment entry screen for member transactions

### Previously

When you were on the **Payment Entry** screen for a member transaction, the **Policy** field was too narrow to show the full policy number.

### Now

The field has now been expanded. When you are on the **Payment Entry** screen for a member transaction, you can now see more of the **policy** number.

### How and where

1. Go to a Member.
2. From the **More** menu select **Insured (Member) Billing**
3. On the **Insured/Member Billing** screen, from the **More** menu select **Payment Entry**

## Safety huddles

### Safety huddle extracts now include issues and attendees

#### Previously

When creating a printable safety huddle abstract, attendees and issues were not included.

#### Now

Safety huddle abstracts now automatically include the **issues** and **attendees** sections.

## How and where

### Create a Printable Abstract

- From a safety huddle: **Admin > Safety Huddles > Huddle Number > More > Printable Abstract**
- From a data entry event: **Admin > Data Entry Events > abstractsSafetyHuddles**
- From a bulk action: **Admin > Safety Huddles Records > More > Bulk Actions > select Printable Abstract** bulk action

Huddle Number	<input type="text"/>	Huddle Leader User	<input type="text"/>			
Huddle Name	<input type="text"/>					
Huddle Date	<input type="text"/>					
Huddle Duration	<input type="text"/>					
Safety Huddle Issues						
Safety Huddle Issue Number	Issue Date	Entry User	Safety Huddle Issue Type	Issue Description	Is Inactive	Memo
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
Safety Huddle Attendees						
Attendee Name	Email	Phone	Attendee Type	Attended		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		

► *Safety huddle abstract sample*

## Tasks

### Complete or delete tasks from a parent record

#### Previously

If you wanted to complete or delete tasks from a parent record, you would need to click into each task individually or navigate to the “All Tasks” list view.

#### Now

In the right-hand panel of a parent record, you can now see a check mark and red ‘x’ for each task which allows you to easily complete or delete tasks from the parent record.

The check mark and x will only appear if you have permissions to see these actions.

