eScription One Distribution Rules

User Guide

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Introduction

Distribution rules allow more precise control over how a report is distributed. Users can configure when, where, and to whom a document should go based on criteria such as document type, location, dictating user, authenticating user, and more. Rules are initiated based on selected workflow trigger(s). If all criteria specified for the rule matches the document, the rule is run.

Enabling Distribution Rules

Two new settings have been added to InCommand to allow for the creation and management of distribution rules.

To allow InQuiry users to manage distribution rules, go to Client Maintenance> Maintenance> Users> Edit 'User'. Expand the 'Maintenance Access' section and click the **Maintenance – Distribution Rules** check box.
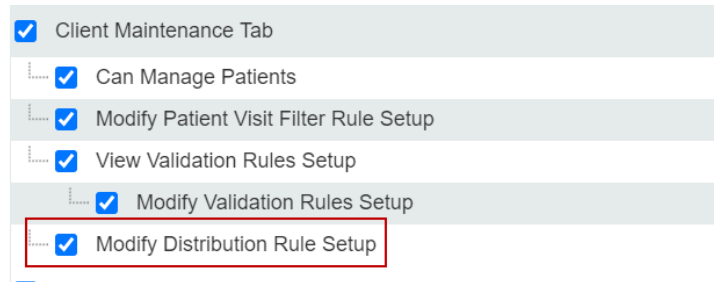

To allow InCommand users to manage distribution rules, go to Maintenance> Transcriptionists> Edit 'transcriptionist'. Expand 'InCommand Security Roles'.

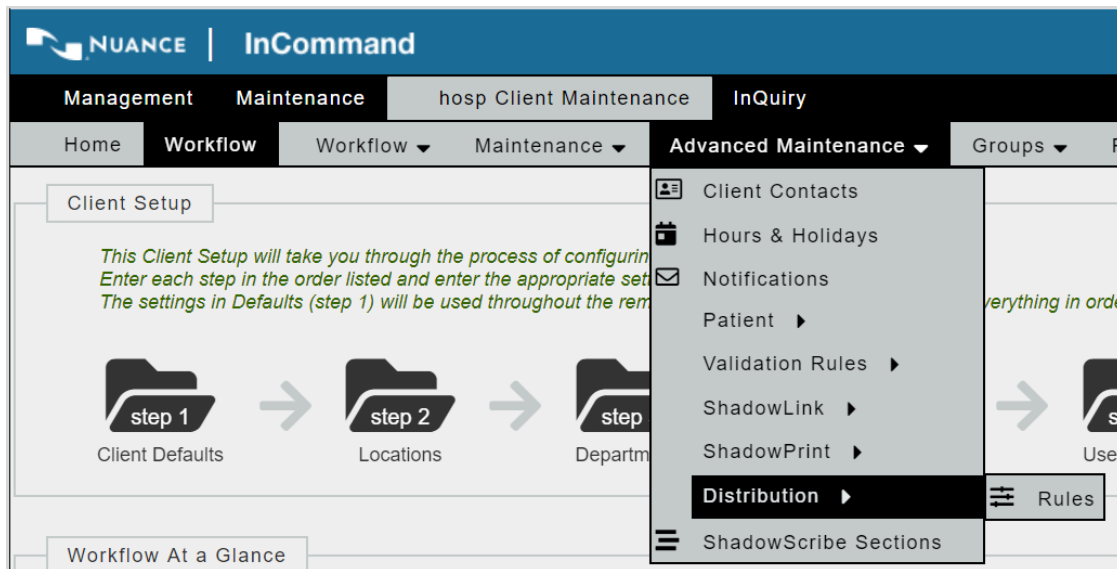Scroll down to 'Client Maintenance Tab'. Under this option, click the **Modify Distribution Rule Setup** check box.

Setting up Distribution Rules

Once enabled, go to InCommand> Client Maintenance> Advanced Maintenance> Distribution> Rules to start configuring rules.

The Distribution Rules screen:

		Name	Triggers	Roles	Document Types	Locations	Dictating Users	Authenticating Users	Associates
			All	All	All	All	All	All	All
		Authenticator	Preliminary	Additional Authenticator, CC Associate	All	All	All	All	All
		Fax CCs	Delivery	CC Associate	All except Imaging Report	All	All	All	All except James Bartholomew, Franklyn Cartwright
		Print for Attending	Delivery	Attending	Chart Note	All	All	All	All
		Print to 1st Flr Discharge Summ	Marked For Review 2	Admitting	Discharge Summary	East Campus	All	All	All

The Distribution Rules screen allows users to add, edit, and copy rules. To customize the screen, use the following buttons located at the bottom or top right:
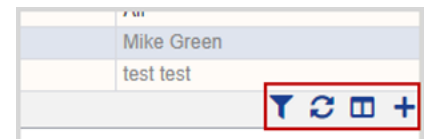
The Clear Filter button removes any filtering that has been applied.

The Refresh button refreshes the results list.

The Field Chooser button lets you select which columns should be displayed or hidden. To add or remove columns in the results list, drag column headers out of or into the window that appears. You can also change the orders by dragging the columns.

Only Active rules appear by default. To show inactive rules, select the Inactive or All filter option in the Active column or click the clear filter icon:

Creating a New Rule

+ Press the Add button to create a new rule. The Add New Distribution Rule screen opens.

Distribution Rule Information

Provide the following information for each rule:

- **Name:** Assign a unique name to the rule. This name will be used on subsequent screens to identify the rule. This is a required field.
- **Description:** Enter a descriptive summary of the rule triggers and other helpful information. (500 chars max)
- **Rule Active:** On/Off switch for the rule. If a rule is no longer needed, temporarily or permanently, uncheck this box to deactivate the rule. It will not be deleted.

    Once you name and describe the rule, you must select triggers and filters for the rule.

    Note: All rules matching the criteria of a particular dictation will run.

Workflow Trigger

Select one or more workflow positions to trigger a distribution when the transcription leaves that position. Note that the name displayed for the folders will reflect the name set up for the client's workflow folders.

If multiple workflow positions are chosen, and a job leaves each position as a result of separate actions, the job will be distributed after leaving each position. If multiple workflow positions are chosen, and a job leaves all positions as a result of one action, then the job will be distributed only once.

Triggers:

- **Dictation Received:** select to run the rule after the dictation has been received. This is used in very rare circumstances, as there is no transcription content available at the time, only data related to the transcription.
- **Delivered:** select to run the rule after the transcription has been typed and delivered to the client.
- **Completed from Marked For Review:** select to run the rule once the transcription is past this point in the workflow.
- **Completed from Preliminary:** select to run the rule once the transcription is past this point in the workflow.
- **Completed from Final Print or Final Fax:** select to run the rule once the transcription is past this point in the workflow.
- **Edited:** select to run the rule any time the transcription is edited after the first trigger point.
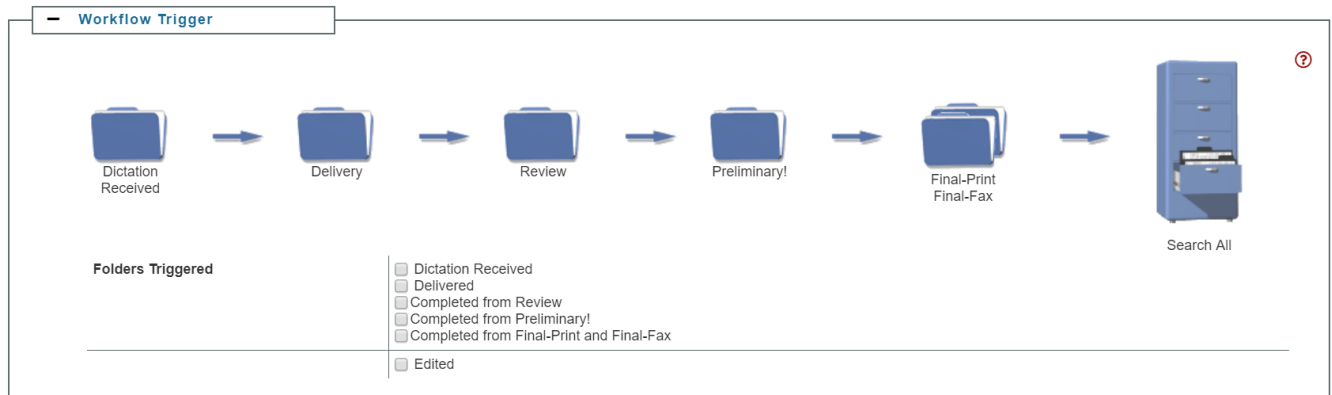
Roles

Select who will receive the document when the dictation passes the workflow trigger.

You can select one or more roles. To print all transcriptions, chose the Dictator role and set all filters to Include All.

The following fields are available as filters. Click on a field to expand it, or to expand all fields, click 'expand all' at the bottom of the screen.

| + Document Types |
| + Location Groups |
| + Locations |
| + User Groups |
| + Users |
| + Authenticating User Groups |
| + Authenticating Users |
| + Patient Types |
| + Patient Classes |
| + Patient Location Descriptions |
| + Associates |

When adding associates, note that:

- When distributing via the 'Fax Associate' method, the rule will check whether an associate has auto-fax enabled before queuing up a fax. If auto-fax is not enabled, no fax will be sent to that associate.
- The rule will only match if the selected associate(s) is in one of the selected recipient roles (see 'Roles' above).
- If an associate is in multiple roles on a transcription, or the transcription matches multiple rules that include the same associate, then the associate will only receive one copy of the transcription.

When adding user groups and users:

- A rule will pass only if the user matches the user group filter AND the user filter.

For each of the above filters, three options are available:

- **Include All** – enables the rule for all the filter's values. This is the default.
- **Include Selected** –provides a list of values to choose from. The rule will run only when the selected value(s) match a dictation. Use this option to make a small number of selections from a larger list.

  Click the check boxes to make selections. Filter a list by typing in the text box above the grid.

- **Include All Except Selected** – provides a list of values to choose from. The rule will run only when the selected value(s) do NOT match a dictation. Use this option when you want to include the majority of the list, with only a few exceptions.

Distribution Options

Distribution rules can be sent to an associate via fax or to a ShadowPrint printer.

Note: If 'Fax Associate' is selected as the distribution method and the distribution is intended for the role of 'Dictator' or 'Authenticator', the Dictator/Authenticator must be linked to an Associate via the Referral User section on the Edit Associate screen. The Dictator or Authenticating User must have the AutoFax and InQuiry options checked on their associate record, have the appropriate user selected in the Referral User drop-down (see below), and have a valid Fax Number populated in order to receive their faxes.

Distribution options:

- **Fax Associate** –faxes the document to the fax number that has been entered in InCommand for an associate.
- **Fax Specific Number** – faxes the document to a specific number that you enter here.

   Note: To prevent configuration issues when adding a new distribution rule with a fax delivery type, a warning will be displayed if there is an AutoFax trigger already enabled.

- **Print** – prints the document to one or more ShadowPrint printers (printers available for the local client). If this option is selected, all printing options that are currently available on the ShadowPrint rules screen can be configured.

  - **Priority** – defines the next transcription to be spooled from the print queue. Transcriptions queued with a higher priority are printed first (1 is the highest priority, 10 is the lowest; and 5 is the default priority setting and is considered normal). Priority will not change the order of printing for transcriptions already spooled.

  - **Number of Copies –** indicates the number of copies of the transcription to print at each printer defined in the rule.

  - **Use Distribution Rule Footers –** uses the distribution rule footers as configured on the print template. This option is commonly used to indicate who the recipient of a given print job is for when there are multiple roles enabled for a given printer. Documents will be printed with 'Copy To: [Recipient name]' in the footer. When this option is selected, standard footers will be overridden.

    Note: The default Distribution Rule footer is set to 'Copy To: [Recipient name]' but can be changed to accommodate the client's needs.

Example:

- ○ **Watermark –** allows for an override of the default watermark assigned to the document type.

  - ▪ **Do not Override –** The document type's default watermark will apply.

  - ▪ **Copy–** Transcriptions always print with the word "Copy" watermarked, regardless of the watermark setup for the document type.

  - ▪ **None –** Transcriptions will always print with no watermark, regardless of the watermark setup for the document type.

  - ▪ **Preliminary –** Transcriptions will always print with the word "Preliminary" watermarked, regardless of the watermark setup for the document type.

Distribution Options

Distribution Method	Print ▾
Priority	5 Normal ▾
Number Of Copies	1 ▾
Use Distribution Rule Footers	☐
Watermark	Do Not Override ▾

Printer Selection

Printer	Service Account	Active	Included
		▾	▾
Nuance PDF	SP1	Active	☐
Canon MP620 series Printer (Copy 1)	SP2	Active	☐
NPI416822 (HP LaserJet CP1525nw)	SP2	Active	☑
NPI92736B (HP LaserJet P2035n)	wschmidtprint	Active	☐

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To select a printer, click the check box in the **Included** column. Multiple printers can be selected, either from the same or different services.

Click the Save button when you finish creating the rule.

💾 save

Any rules that distribute to printers will appear on the ShadowPrint Rules management screen in InQuiry (Services> ShadowPrint Rules).

Editing a Rule

To edit an existing rule, click the Edit icon next to the rule on the Distribution Rules screen.

The Edit Distribution Rule screen appears, allowing you to modify the rule as needed.

Editing an Associate

When editing an associate who is included on a distribution rule (Client Maintenance> Maintenance> Associate), those distribution rules appear at the bottom of the Edit Associate screen. Here the rules can be directly edited if necessary, as a result of changes made to the associate.

Copying a Rule

To copy a rule, click the copy icon next to the rule. The Add New Distribution Rule screen displays. Enter a new name for the rule and modify it as needed.
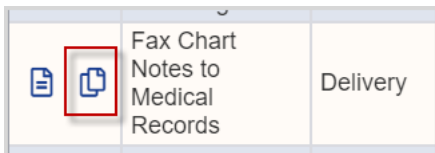
Suppressing Duplicate Copies

To avoid recipients receiving multiple copies of the same transcription we have put in place some deduplication logic:

- If an associate is in multiple roles on the same transcription, then the recipient will receive only one copy per distribution method.
- If a transcription matches multiple rules that include the same recipient, then the recipient will only receive one copy per distribution method.
- If multiple rules with different distribution methods apply to a transcription, then the recipient will receive a copy for each unique distribution method for the same transcription (i.e. fax, print, fax to a specific number, giving the recipient up to three copies).

 Note: Please note that AutoFax and ShadowPrint Rules work independently of Distribution Rules. If AutoFax and/or ShadowPrint are enabled for the client in addition to Distribution Rules, recipients may receive duplicate copies of transcriptions. We recommend disabling AutoFax and ShadowPrint rules when Distribution Rules are used.

Managing Distribution Rules Jobs

Users can check on print and fax jobs via the following locations.

Viewing Transcriptions in the Activity Log

Distribution rule details have been added to the Transcription Information Activity Log to help users better determine if a transcription was printed or faxed as a result of a distribution rule. To view the Activity Log for a transcription, go to Management> Delivered Transcriptions> Search. Under the Actions column, click to view/open a transcription.

The 'Action By' column now displays the name of the distribution rule that triggered the print/fax activity; the 'Action' column displays printed/faxed activities (including queued, created, spooled, canceled, succeeded); and the 'Type' field displays 'Distribution Rule'.

Activity

All times are in the time zone of "Central Standard Time"   view archived

	Date ▲	Action	Action By	Type
↺	5/19/20 3:14 PM	Received	admin	InQuiry User
	5/29/20 11:13 AM	Viewed	admin	InQuiry User
↺	5/29/20 11:13 AM	Edited	admin	InQuiry User
	5/29/20 11:13 AM	Viewed	admin	InQuiry User
↺	5/29/20 11:15 AM	Edited	admin	InQuiry User
↺	5/29/20 11:15 AM	Completed From Preliminary	admin	InQuiry User
ⓘ	5/29/20 11:15 AM	Print Job Queued	Authenticator	Distribution Rule
	5/29/20 11:16 AM	Export Triggered	DOC	Interfacing
	5/29/20 11:16 AM	Export Rendered	DOC	Interfacing

view archived

For additional information, click the ⓘ button. For print jobs, the Job ID appears, as well as the Distribution Rule Footer.

For fax jobs, the number of fax attempts, date/time of fax, and result are displayed.

Activity

All times are in the time zone of "Central Standard Time"   view archived

	Date ▲	Action	Action By	Type
↺	5/19/20 3:14 PM	Received	admin	InQuiry User
	5/29/20 11:13 AM	Viewed	admin	InQuiry User
↺	5/29/20 11:13 AM	Edited	admin	InQuiry User
	5/29/20 11:13 AM	Viewed	admin	InQuiry User
↺	5/29/20 11:15 AM	Edited	admin	InQuiry User
↺	5/29/20 11:15 AM	Completed From Preliminary	admin	InQuiry User
ⓘ	5/29/20 11:15 AM	Print Job Queued	Authenticator	Distribution Rule
	Print Job ID: 528		**Copy For:** Associate Mail 1	
	5/29/20 11:16 AM	Export Triggered	DOC	Interfacing
	5/29/20 11:16 AM	Export Rendered	DOC	Interfacing

view archived

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Checking Print Job Status in InQuiry

Print jobs triggered by distribution rules will also be listed in InQuiry> Services > ShadowPrint > Transcriptions. The Distribution Rule name will appear in the Rule column in the search results grid, as well as when you open the print job to view details.

Viewing Distribution Rules Reports

Two reports are available for distribution rules: **Inventory** and **History**. They can be run directly from the Distribution Rules screens.

To run the Inventory report, click one of the Inventory Report links on the main Distribution Rules screen:

To run the History report, click 📄 to edit a rule. Then click the 'view history' link at the bottom of the Edit distribution Rule screen:

view history

	+	**Associates**	
	+	**Distribution Options**	

ave   last modified by cryqa1 on 5/30/2020 10:04:28 PM view history
                                       ⊞ expand all   ⊟ collapse all

Once you click on a report link, a message appears indicating that a report has been queued.

Report Queued   ✖

The report has been queued for execution, you will receive a notification when it is completed.

Ok

After the report is generated, a second message appears with a link to the report.

There are **1** report(s) completed and ready for   (X)
review in your Saved Reports folder.

The most recent one is:

Distribution Rules Inventory Report - hosp

Show All Saved Reports

Distribution Rules Inventory Report

The Inventory report shows the configuration details for each Print and Fax Rule in one place. Click the sheets at the bottom of the page to see filter details for each rule.

	A	B	C	
1	**Distribution Rule Workflow Trigger for Client: Hospital (hosp) as of 05/30/2020 10:19 PM):19 PM**			
2	Rule ID	Name	Edited	Folders Triggered
3	92	Associates	FALSE	Completed From Mail Assoc Print
4	98	Authenticator	FALSE	Completed From Preliminary
5	101	Fax CCs	FALSE	Delivered
6	102	Print for Attending	FALSE	Delivered
7	103	Print to 1st Flr Discharge Summ	FALSE	Completed From Marked For Review 2

Distribution Rule Information | **Workflow Trigger** | Roles | Document Types | Location Groups … ⊕

	A	B	C
1	**Distribution Rule Roles for Client: Hospital (hosp) as of 05/30/2020 10:19 PM**		
2	Rule ID	Name	Provider Role ID
3	92	Associates	CC Associate
4	98	Authenticator	Additional Authenticator
5			CC Associate
6	101	Fax CCs	CC Associate
7	102	Print for Attending	Attending
8	103	Print to 1st Flr Discharge Summ	Admitting

Distribution Rule Information | Workflow Trigger | **Roles** | Document Types | Location Groups … ⊕

	A	B	C	D
1	**Distribution Rule Associates for Client: Hospital (hosp) as of 05/30/2020 10:19 PM**			
2	Rule ID	Name	Filter Type	Associates
3	92	Associates	Include All Except Selected	, Test (12)
4				<Script>Alert(1)</Sc, <Script>Alert(1)</Sc (39)
5				Creevy, Joseph (20)
6	98	Authenticator	Include ALL	
7	101	Fax CCs	Include All Except Selected	Bartholomew, James (U52966)
8				Cartwright, Franklyn (FC1)
9	102	Print for Attending	Include ALL	
10	103	Print to 1st Flr Discharge Summ	Include ALL	

… Patient Types | Patient Classes | Patient Location Descriptions | **Associates** | Distribution Options … ⊕

Distribution Rules History Report

The History report shows the changes that have been made to the selected distribution rule, as well as who made those changes.

Changes are highlighted in yellow.

	B	C	D	E
2	Client :	**Hospital**		
3	Rule ID :	**102**		
4	Modified Date	5/30/2020 9:17:52 PM	5/30/2020 9:31:25 PM	5/30/2020 9:46:31 PM
5	User ID :	cryqa1	cryqa1	cryqa1
6	**Distribution Rule Information**			
7	Name	Print for Attending	Print for Attending	Print for Attending
8	Description			
9	Rule Active	TRUE	TRUE	TRUE
10	**Workflow Trigger**			
11	Folders Triggered		Delivered	Delivered
12		Completed From Marked For Review 2		
13	Edited	FALSE	FALSE	FALSE
14	**Roles**			
15	Roles	Attending	Attending	Attending
16	**Document Types**			
17	Filter Type	Include Selected	Include Selected	Include Selected
18	Document Types	Chart Note (Chart)	Chart Note (Chart)	Chart Note (Chart)
19				Imaging Report (Imaging)
20	**Location Groups**			
21	Filter Type	Include ALL	Include ALL	Include ALL
22	Location Groups			
23	**Locations**			
24	Filter Type	Include ALL	Include ALL	Include ALL
25	Locations			
26	**Dictating User Groups**			

`History - Distribution Rule`

Support

Get assistance for Distribution Rules, and all other eScription One applications, here:

– Phone Support: 1-800-858-0080

– Support Email: esone.support@DeliverHealth.com

– InCommand Login:

> o **Australia** https://www.escription-one.com.au/tspadmin/
>
> o **Canada** https://www.escription-one.ca/tspadmin/
>
> o **United States** https://www.escription-one.com/tspadmin/
>
> o **United Kingdom** https://www.escription-one.co.uk/tspadmin/

– InQuiry Login:

> o **Australia** https://www.escription-one.com.au/inquiry/

- o **Canada** https://www.escription-one.ca/inquiry/

- o **United States** https://www.escription-one.com/inquiry/

- o **United Kingdom** https://www.escription-one.co.uk/inquiry/