

eScription One Distribution Rules

User Guide

All content is the exclusive property of DeliverHealth | Copyright © 2021 DeliverHealth

Table of contents

Introduction	. 3
Enabling Distribution Rules	. 3
Setting up Distribution Rules	. 4
Creating a New Rule	. 6
Distribution Rule Information	. 6
Workflow Trigger	. 6
Roles	. 7
Distribution Options	. 9
Custom Filters	15
Testing	16
Editing a Rule	16
Editing an Associate	16
Copying a Rule	17
Suppressing Duplicate Copies	17
Managing Distribution Rules Jobs	18
Viewing Transcriptions in the Activity Log	18
Checking Print Job Status in InQuiry	19
Viewing Distribution Rules Reports	19
Distribution Rules Inventory Report	21
Distribution Rules History Report	22
Support	22



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 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.

	hosp Client Maint	enance	InQuiry					
•	Maintenance 🗸	Advance	ed Maintenance 👻 Gro	ups 🗸 🛛 Pools 🗸	Templates 👻			
lictatin	g - not dictating		 Folder Access Access Rights Maintenance Access 	285				
			Δt	tribute	Result	Group	llser	
			Maintenance - Client D	efaults	✓ V	Cloup		
			Maintenance - Associa	tes	✓			
			Maintenance - Docume	ents	~		\checkmark	
			Maintenance - Users		~		\checkmark	
			Maintenance - Templat	es	~		\checkmark	
			Maintenance - Interface	es	~		\checkmark	
			Maintenance - Shadow	Print	~		\checkmark	
			Maintenance - Groups		~		\checkmark	
			Maintenance - Distribut	tion Rules	*		\checkmark	

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

Transcriptionists	Software	Advar	iced Maintenance 👻	
			Default Rate Options	
			InCommand Setup Options	
			- InCommand Security Roles	(?)
			Maintenance Tab	

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



Δ



Setting up Distribution Rules

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

Manage	ement	Mair	ntenance	h	osp Client	Maintena	nce	InQuiry				
Home	Worl	kflow	Workflo	ow 🗕	Maintena	ance 🗸	Ad	vanced Maintena	ince 🚽	Grou	ps 🗸 🛛 I	Ρ
Client	Setup]					L ≡	Client Contacts				
This	Client S	l etun wili	I take you th	rough th	e process of	Configurin	ä	Hours & Holiday	ſS			
Ente	r each s	tep in th	e order listed	d and en	ter the appro	opriate set	\square	Notifications			thing in a val	
Ine	settings	In Defai	lits (step 1) \	vIII be u	sea throughd	out the rem		Patient 🕨		veryt	ning in ora	e
								Validation Rules	•			
ſ	tep 1			tep 2	\rightarrow	step		ShadowLink 🕨				si
Clier	t Defaul	ts	Loc	cations		Departm		ShadowPrint 🕨			Use	er
								Distribution 		≢	Rules	_
Workflo	ow At a	Glance	e				Ξ	ShadowScribe S	Sections			



The Distribution Rules screen:

Use the Distribution Rules screen to add, edit, and copy rules. To view configured distribution rules, you must first specify search criteria, as shown below. 'ALL' is selected by default. To choose a specific criteria, open the drop-down and select an item from the list. The Dictating User, Authenticating User, and Associate drop-down menus all support searching for clinicians using alphanumeric and special characters, including spaces, apostrophes, and parentheses.

DeliverHealth	TRANSCRIPTION COMPANY CI	
Management Maintenance InVision	eSODemo Client Maintenance InQuiry	
Home Distribution Rules Workflow	✓ Maintenance	
Distribution Method All	✓ Dictating User All	Q search
Document Type All	✓ Authenticating User All	
Locations All	✓ Associate All	s clear
	Results Per Page 10 V	+ add rule

Click the **Search** button to populate the rules grid.

	DeliverHealth InCommand TRANSCRIPTION COMPANY Cr 1									
Manager	Management Maintenance InVision eSODemo Client Maintenance InQuiry									
Home	Distribution Rule	es Workflow 🗸	Maintenance 🗸	Advanced Maintena	nce 🗸 Groups 🗸	Pools 🗸 Ter	mplates 🗸			
	Distribution Method	All		~	Dictatin	g User All		*	Q search	
	Locations	All		~	Autrient	ite All		•	💕 clear	
					Results	Per Page 10 🗸			+ add rule	
Inventory F	Report		H4 4	Page 1 of 1 🕨 🕨	M		Choose Columns 🔟 Rese	et Layout ኳ 🛛 Clear Filter	rs 🍸 Refresh 😂	
Actions (i)	Name	Distribution Method	Triggers	Roles	Document Types	Locations	Dictating Users	Authenticating Users	Associates	
edit copy	Dictator & CC	Print	Preliminary	Dictator, CC Associate	All	All	All	All	All	
edit copy	East Campus	Print	Final and Final 2	Dictator, Additional Authenticator, CC Associate	Letter, Dschg, Imaging	East Campus	Additional Authenticator, Clarence Clayburn, Attending Jacoby	All	All	
edit copy	East Campus and Teaching Hosp	Fax Specific Number	Final and Final 2	Dictator	All	East Campus, Teaching Hospital	All	All	All	
edit copy	New Test rule	Print		Additional Authenticator	All	All	All	All	All	
edit copy	Test 1	Print	Approval in Preliminary	Additional Authenticator	All	All	All	All	All	
Inventory F	Report		144 4	Page 1 of 1 🕨 🕨	M		Choose Columns 💶 Rese	et Layout ঝ Clear Filter	rs 🝸 Refresh 😂	

Under each column in the grid, you can type in text to filter search results. As you hover over a rule, it will be highlighted in a different color for easier viewing.

To customize the screen, use the following buttons located at the bottom or top right:





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.



The Reset Layout button resets the grid to the default column layout.



The Clear Filter button removes any filtering that has been applied.



The Refresh button refreshes the results list.

DeliverHealth

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.

+	add	rule

Add New Distribution Rule	🛨 expand all 🗖 collapse all 🔀 save	Dreset 👖 close
Distribution Rule Information		
Name	*	0
Description		
Rule Active		-
+ Workflow Trigger		
+ Roles		
+ Document Types		
+ Location Groups		
+ Locations		
+ User Groups		

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.

🅤 DeliverHealth

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.

- Roles		୭
Roles	Dictator Additional Authenticator C Associate Attending Attending Admitting Primary Care Consulting Ordering	•

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





When adding associates, note that:

- When distributing via the 'Fax Associate' method, the rule will check whether an associate has autofax 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:

_	Document Types		
	Filter Type	Include All	
		Include All	_
	Document Types	Include Selected	
		Include All Except Selected	

- 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.



- Document Types					
Filter Type	Include Selected V				
Document Types	DocumentTypes Per Page: 15 ✓	M	✓ Page 1 of 1 ▶	Clear Filters	Refresh Reset
	Document Description		Document Type		Included 🔗
					-
	Chart Note		Chart		<
	Consult or Referral Letter		Letter		
	Discharge Summary		Dschg		✓
	Imaging Report		Imaging		
	Patient Letter		PLetter		
	RPH Template		RPH		
		M	◀ Page 1 of 1 ▶	Clear Filters	Refresh Reset

 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, to a ShadowPrint printer, or though the ShadowLink service.

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.

Edit Asso	ociate				×
	Email		Send Fax Cover Page		A
	Method of Delivery				
	Mail		InQuiry		
	AutoFax		Referral User	Surgeon, Demo	~
				Referral From Local Client	~
		last modified by SRF	_IMP on 6/18/2008 2:23:04 PM		
	Distribution Rules				
	Inventory Report	M 📢 Page 1 of 2 🅨 🔛	Choose C	Columns 🔟 Reset Layout 🕰 Clear Filters 🍸	Refresh C
	Actions i Name	Distribution Method Triggers Roles Document	Types Locations	Dictating Users Authenticating Users	Associates
					ok cancel



Distribution options:

- Distribution Options		(\mathfrak{I})
Distribution Method	Fax Associate	_
	Print ShadowLink	

- **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.

Client Has Existing Fax Trigger
This client has a legacy fax trigger enabled as configured under the client defaults 'AutoFax After Event' section.
Are you sure you would like to create a fax distribution rule?
Ok Cancel

- 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.

Distribution Rule Footers (Sha	dowPrint)	
HTML Page Footer page 1	[Copy To: [Copy_For]	
HTML Page Footer	Copy To: [Copy_For]	



Example:

Family history	
Code status	4
Mark Doc	
Date Dictated: 11/03/2017 Date Transcribed: 04/19/2019 MD/MT Job #: 3577	C
cc: Mark Associate	
Copy To: Mark Associate	

- Use Cover Page allows adding a cover page to ShadowPrint jobs. It is only for use with print jobs; None is selected by default. To add a cover page, select DOCX Cover Page from the drop-down menu. Cover page information will be pulled from the ShadowLink Transcription formats. The format must be of type DOCX. Please contact Support for assistance in creating the desired rendering information for your cover page.
- 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 Rules Workflow 🗸 Mainten	ance 👻 Advanced Mainten	ance 🗸 Groups 🗸 Poo	ls 👻 Templates 👻	
Distribution Method	Print 🗸			
Priority	5 Normal 🗸			
Number Of Copies	1 🗸			
Use Distribution Rule Footers	v			
Use Cover Page	None	3		
Watermark	Do Not Override V			
Printer Selection	Printer	Service Account	Active	Included
			© -	
	Bullzip PDF Printer	spdocx	Active	
	Bullzip Printer (XPS)	spdocx	Active	
	Nuance PDF	sptest	Active	
	Bullzip PDF Printer	spxps	Active	
	Bullzip Printer (XPS)	spxps	Active	
	Bullzip PDF Printer	spxpsi	Active	
	Bullzip Printer (XPS)	spxpsi	Active	✓
		H4 44	Page 1 of 1 🕨 🖬	₹ 2

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** when you finish creating the rule.





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

Home	Search All	Workflow	Problem List	Faxes	Services	InVision	My Templates	Log Out Super Admin
Summary	y Fax	es 🗸 🛛 S	shadowPrint 👻	Shado	wLink 👻	Shadow	Print Rules	
								help
+ Authentica	tor							[1 queued, 0 spooled]
+ Prelim								[0 queued, 0 spooled]
+ prelim2								[0 queued, 0 spooled]

- **ShadowLink** distributes the document through the ShadowLink service. The available delivery options behave the same as they do for a ShadowLink rule.
 - Include All Linked Documents includes all appended documents in the document set available for rendering and data usage. Note that all documents that are appended to one another must all pass the rule for the rule to trigger.

The 'Delivery Extension Selection' area shows ShadowLink service accounts and their corresponding delivery extensions. The extension you select here will be used for the distribution, along with the selected format.

Multiple extensions and formats can be selected, even from different services.

Distribution Method	ShadowLink	~			
Include All Linked Documents					
Delivery Extension Selection	DeliveryExtension	Service Account	Active	MARKCLIENT: Another Transcription TXT	Included
			8	MARKCLIENT: DOCX Cover Page	•
	Transcription TXT	mtest (MarkClient)	Active	MARKCLIENT: Transcription TXT	✓
	Transcriptions via	Athenn Test (MarkClient)	Inactive	MARKCLIENT: Transcription TXT - Plain Text MARKCLIENT: Word Doc	
	Transcriptions via	Test (MarkClient)	Active	MARKCLIENT: Another Transcription TXT	
			🙌 📢 Page	1 of 1 🍽 🔛	TO

New distribution rules created with the ShadowLink distribution method will appear in the Rules drop-down menu in InCommand and InQuiry (on the ShadowLink Transcription Deliveries tab):

DeliverHealth				MAF 🗸
Emdat MARKDEMO Management	MARKDEMO Maintenance MARKDEMO InVisi	on MarkClient Client Maintenance Ma	arkClient InQuiry	
Summary - Outstanding Job	s Delivered Transcriptions Advanced	Management 🗸 Options 🗸 Shadow	Link Transcription Deliveries	
Client MarkClient (Mark Tes Rule FAry Service Copy of Shadowlink D PatrickS Delete 2 Deliver, PatrickS Delete 1 Formal faile 2 Job ID Test Rule a	IS Rule	Transcription ID Status Any Date Created Date Rendered Date Retrieved Date Delivered Results Per Page 50 V	thru thru thru thru thru thru thru thru	Q search ✔ clear

You can also manually trigger a distribution for a distribution rule configured with the ShadowLink via the 'Export this job' dialog as is currently done for ShadowLink rules.



Export Now		
To push an export through n The transcription must meet	ow, select a rule and delivery method below. the selected Rule to Export.	
Rule	Copy of Shadowlink DS Rule	
Delivery Method/Format	Transcriptions via API / Transcription 1	
·	2	
The second se		
Exclude Export		
Do you want to exclude this	transcription from future exports?	
Do you want to exclude this Exclude	transcription from future exports?	

The ability to use the **test** button on the Export dialog is unavailable, however, you may use the **export now** button to export the transcription.

To push an export through n The transcription must meet	ow, select a rule and de the selected Rule to Ex	livery method below. port.					
Rule	Shadowlink DS Rule		Shadowlink DS Rule		Shadowlink DS Rule		~
Delivery Method/Format	Transcription TXT /	Transcription TXT	~				
Rule Test Status	Fail						
Field Name The testing feature is u	Field Value	Status tion rules at this time without testing.	Reason				
Field Name The testing feature is u Exclude Export	Field Value	Status tion rules at this time n without testing.	Reason				



From the 'Export this job' dialog you can also select a ShadowLink distribution rule and re-export a transcription to a specific recipient. Select one of the recipients from the 'Recipient' list and then choose 'export now' to re-send the transcription.

Export now			
To push an export through n The transcription must meet	ow, select a rule and delivery method below. the selected Rule to Export.		
Rule	Shadowlink DS Rule	~	
Delivery Method/Format	All	~	
Recipient	All Recipients		
	John D. Primary MD (CC Associate)		
Exclude Export	Jane D. Securally ND (CC Associate)		
Exclude Export			
Do you want to exclude this	transcription from future exports?		
Do you want to exclude this Exclude	transcription from future exports?		

Custom Filters

A custom filters section is available for a rule configured with the ShadowLink delivery method. Custom filters are created by the eScription One interfaces team when existing filters do not meet the client's need or are not specific enough. They ensure that transcriptions meeting some criteria pass the rule, while those not meeting the criteria, do not pass the rule.

When adding or editing a rule, you can add any custom filter that has already been created by the interfaces team.

Click +Add Filter to select a filter. Choose an operator and value for the filter, then save.

- Custom Filters					
Cuetom Eiltore					0
Custom Filters	Action	Field	Operator	Value	
	📄 Edit 💥 Delete	Recipient Has Autofax Enabled	Equals	True]
	📕 Save 🖹 Undo	New Test Field	Equals 🗸		
	Add Filter				1

- Action: choose to Save or Undo changes made to the custom filter.
- Field: choose a field that has been created for the client.
- Operator: choose Equals or Does not Equal.
- Value: the value that the field should or should not equal.



Testing

Use this section to test your distribution rule settings against specific transcriptions for a client.

Enter the Transcription ID (TID) number, then click the **Test** button. The test can be run on any TID in outstanding or delivered jobs.

- Testing		0
Transcription ID	🖌 test	
Result		

Note: Test files will not work with custom formats created for use with ShadowLink distribution 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.

AutoFax					Referral Use	r			\sim
							Referral From Local	Client	\checkmark
last modified by chsl1 on 9/8/2017 10:22:05 AM									
Distributio	n Rules								
Market Inventory Report		Ide				Choose Columns 🔲 Reset Layout ኳ Clear Filters 🝸 Refresh 🥃			Refresh
	y Report	14					,,,.,	•	
Actions	Name	Distribution Method	Triggers	Roles	Document Types	Locations	Dictating Users	Authenticating Users	Associates
Actions	Dictator & CC	Distribution Method Print	Triggers Preliminary	Roles Dictator, CC Associate	Document Types	Locations All	Dictating Users	Authenticating Users	Associates



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

Print and fax jobs can be checked via the following locations.

Viewing Transcriptions in the Activity Log

Distribution rule details have been added to the Transcription Information Activity Log to help 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 time.	s are in the time zone of "Centra	Standard Time"	Refresh 🗧 View Archived 🔳
Date	Action	Action By	Туре
11/12/19 8:48 AM	Export Delivered	test	Interfacing
6/17/20 8:38 AM	Print Job Queued	MG Printers	Distribution Rule
6/17/20 8:38 AM	Print Job Queued	MG Printers	Distribution Rule
6/17/20 8:38 AM	Print Job Queued	test	ShadowPrint Rule
6/17/20 8:38 AM	Print Job Spooled	MG Printers	Distribution Rule
6/17/20 8:38 AM	Print Job Spooled	MG Printers	Distribution Rule
6/17/20 8:38 AM	Export Delivered	test	Interfacing
6/17/20 8:41 AM	Export Delivered	test	Interfacing
6/17/20 5:49 PM	Print Job Spooled	MG Printers	Distribution Rule

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.



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.

Management Maintenance InVision Client Maintenance eSODemo InQuiry									
Home	Search	All Workflow	Problem Lis	t Faxe	s Services InVis	sion			Log Out Sup
Summary Faxes - ShadowPrint - ShadowLink - ShadowPrint Transcriptions									
		Print Job ID		Ale and			Documer	nt Type All	~
		Status Date		thru			Location	All	Y (2) h€
					📢 📢 Page 1		of 2 🍽 🔛		
View	Status	Status Change Date	Print Job ID	TID	Patient Name	Clinician	Document Type	Printer	Rule
	Printed	8/13/2021 5:44:32 PM	12607189	14916	Tracy Abrams	Super Admin	Chart	SP1: Bullzip PDF Printer	Dictator & CC
	Printed	8/13/2021 5:45:03 PM	12607188	14916	Tracy Abrams	Super Admin	Chart	SP1: Canon MP620 series Printer	Dictator & CC
	Printed	8/13/2021 5:46:33 PM	12607187	14914	Jean Selus	Super Admin	Chart	SP1: Bullzip PDF Printer	Dictator & CC
	Printed	8/13/2021 5:46:48 PM	12607186	14914	Jean Selus	Super Admin	Chart	SP1: Canon MP620 series Printer	Dictator & CC

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:

Ľ	Inven	tory Report									
		Locations	All		~	Associa Results	te All Per Page 10 V		*	cleardd rule	
	🗠 Inventory F	Report		H4 4	Page 1 of 1 🕨 🕨	*		Choose Columns 💶 Rese	ins 🔟 Reset Layout 🖘 Clear Filters 🍸 Refresh 😂		
	Actions i	Name	Distribution Method	Triggers	Roles	Document Types	Locations	Dictating Users	Authenticating Users	Associates	
	edit copy	Dictator & CC	Print	Preliminary	Dictator, CC Associate	All	All	All	All	All	
	edit copy	East Campus	Print	Final and Final 2	Dictator, Additional Authenticator, CC Associate	Letter, Dschg, Imaging	East Campus	Additional Authenticator, Clarence Clayburn, Attending Jacoby	All	All	
	edit copy	East Campus and Teaching Hosp	Fax Specific Number	Final and Final 2	Dictator	All	East Campus, Teaching Hospital	All	All	All	
	edit copy	New Test rule	Print		Additional Authenticator	All	All	All	All	All	
	edit copy	Test 1	Print	Approval in Preliminary	Additional Authenticator	All	All	All	All	All	
Image: Image						rs 🍸 Refresh 🕃					



. .

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

Edit Dictator & CC Distribution Rule	last modified by howard on 10/27/2021 12:27:56 PM	yiew history	🕂 expand all	— co
Distribution Rule Information				

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



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	В		(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	Fo	Iders Trig	gered	
3	92		Associates		FALSE	Co	mpleted F	From Mail Assoc Prir	nt
4	98		Authenticator		FALSE	Co	mpleted F	From Preliminary	
5	101		Fax CCs		FALSE	De	livered		
6	102		Print for Attending		FALSE	De	livered		
7	103		Print to 1st Flr Discharge	e Summ	FALSE	Co	mpleted F	From Marked For Re	view 2
10									
11	1								
12									
13									
14									
15									
1	•	Distribu	ition Rule Information	Workflow Trigger	Roles	Documen	t Types	Location Groups	+

	А	В						
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					
10								
11								
12								
13								
14								
15								
1	 Distribution 	tion Rule Information Workflow Trigger Roles Documen	t Types Location Groups (+)					

	А	В	С	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></script>				



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.

	В	С	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 Llear Groupe	Pada O		
	History - Distribution I	kule (+)		

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:
 - Australia <u>https://www.escription-one.com.au/inquiry/</u>
 - 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/

