Report Rule User Guide

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Role	Name	Title
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Within the context of this feature an “alert” is to be considered an email or a combination of email + an sms alert depending on the type of report rule settings configured
Note: User accounts need to be configured with a phone number and opt in to receive sms alerts

General Fields

Name - Name of the rule

Wards - The wards that are relevant for this report rule

Forms - The forms you want this rule to be in action for

Recipients

Recipients - Individual users who will receive this alert

Recipients teams - Teams who will receive this alert. All members of the team will receive the alert

User fields - User fields i.e “Owner” or “Assignee” that who will receive this alert Note: User fields (Model fields) is the functionality used for certain forms where a user will be chosen within the form

Send to originator - If enabled the person who sent in the initial submission will be the recipient of the alert. **Note:** Where no login is required on public web forms, originator can not receive alerts

Send to ward manager - If enabled all ward managers for the wards chosen in the wards field will receive the alert

Actions

The action in MEG that will trigger the alert

Create Observation - The chosen user(s) will receive an alert at the point a form is submitted, for the forms and areas chosen. [For advanced options like only triggering the alert based off certain criteria in the form please

contact support@megit.com]
Edit Observation - The chosen user(s) will receive an alert at the point a form is edited, for the forms and areas chosen. [For advanced options like only triggering the alert based off certain criteria in the form please contact support@megit.com]
Create Issue - The chosen user(s) will receive an alert at the point an issue is created.
Edit Issue - The chosen user(s) will receive an alert at the point an issue is edited.
Edit Issue Status - The chosen user(s) will receive an alert at the point the status of an issue is edited.
Schedule - The chosen user(s) will receive an alert at a scheduled interval (i.e daily, weekly, monthly). Schedules must be created in the schedule section of our settings area before adding them to a report rule.
Received e-mail message - For use with our "observation emails'' functionality allowing 2 way communication from within MEG with an external email address contained in a form. The chosen user(s) will be alerted when an email is received. (Ideal for patient feedback forms or incident forms where the staff member does not need a log in to MEG - Note: This is not an outright email offering, there can only be one email address per feedback form or incident)
Alert Triggered - For use with our "smart alerts" functionality. This allows users to receive an alert when certain time sensitive criteria is met. For example, "7 Medication Incidents within a week"

Report Content

The type of alert that will be sent

Public Report - *For use with create observation and edit observation - (Advised for auditing)* User will receive a confirmation email with a link to their submission report
Incident Update Notification - *For use with create observation and edit observation - (Advised for incident management)* User will receive an email with a link to the observation that has just been submitted. For example, A medication manager could receive an email when a medication incident is reported by any staff member.
Issue Detail - *For use with our schedule functionality* - users will receive a periodic email summarising the QIP issues linked to their account
QIP Update - *For use with Create Issue, Edit Issue, and Edit Issue Status* - User can be alerted when certain aspects of QIP happen for the chosen forms
Summary of Reminders - *For use with our schedule functionality* - Users will receive a periodic email summarising the QIP issues, Scheduled Audits, Observation Reviews, and Documents with pending actions linked to their account

Default - For use with the “Alert Triggered” action

Blank - For use with the “Received e-mail message” action

Additional fields

Note - Note to be included in the alert. Please refrain from including personally identifiable information.

Subject - Email subject line. If left blank the default for the email type is used.

Advanced Functionality

Note: Advanced functionality must be added by a member of MEG staff. It will be supported as a user facing functionality in time.

Alerts can be triggered based on the criteria of a form. This needs to be done via the “advanced editor” which brings you to the django entry for the report rule.

On this screen there is a “filter logic” field that allows report rules to have even more power because an alert can be sent based on answers received during the data collection process. For example the pharmacy may receive an alert when the category of an incident is equal to medication:

```
{
  "observation_filters": {
    "field": "category",
    "answer": "Medication",
    "answer_operator": "equals"
  }
}
```

Or a ward manager could receive an alert when the compliance score of an audit was below a certain threshold, 60% for example:

```
{
  "compliance_range": [
    0,
    0.60
  ],
  "observation_filters": {}
}
```

Document name	Report Rule User Guide v1

Approval summary

Step 1

David Scully May 10, 2023, 8:56 a.m.