**Prescriptive Rules Cleanup**

* Review the rules for your HSO
* Rules should follow our BJC naming conventions - begin with your HSO acronym
* Rules that only process once and don't need to process again, should be moved to closed status after they have run
* Rules that process regularly for annual assignments should have an end date. Once the end date has passed, move the rule to closed
  + Currently many rules that have only processed once are still active – these should be closed
  + Currently many rules that processed multiple times have end dates and need to be closed as well
* Several rules are sitting out in a draft status - if these will never be used - please go ahead and delete them (Once a rule has processed it cannot be deleted)

**Best Practice for Using Prescriptive Rules Annually**

* Each year, you can copy the rule from the previous year in order to retain the frequency of the assignment and the criteria for who was assigned
* In the copy, adjust title to reflect the current year, and adjust the certification/course being assigned by the rule to include the new training for the year
* Do NOT just modify the previous year's rule for the current year, as modification could then remove anything that has been assigned but not completed for a user (i.e. users on FMLA who still need to complete the training)
* When assigning annual rules, determine if you want the annual rule to assign just one time or if you want it to assign to your users on an ongoing, dynamic basis
  + One-time processing: will not assign training to new users or remove training from current users unless the rule is processed manually. Additional adds and removals in this case can be handled manually on a case-by case basis if needed
  + Ongoing, dynamic processing - processing every day or week - will assign and remove training based on changes to user in the system (i.e. job change, department change, or HSO - whatever criteria is in the member selection)

**New Hire training - should process regularly (weekly or every other week)** so that as new people enter a cost center/job/HSO they receive the training that they need

**Business Rules for Prescriptive Rules**

Use prescriptive rules for one-time processing for bulk assignment to multiple users

For ongoing processing of a rule to add and remove training based on criteria:

When the rule processes it assigns training to the users in the criteria

If you change the users - the next time the rule processes it will modify who is assigned based on the membership change

* If you remove all the users or all the training from the rule, the rule will fail
* If you add or delete the training in the rule, the rule will remove incomplete training and then assign the new training
* Rules will not remove training that is completed
* A Prescriptive Rule will only remove the training that was assigned by that specific rule; it will not remove training that was assigned by a different rule
* Rules that have processed at least one time cannot be deleted - they can be closed

**Audience Types**

Audience Types are used for limiting access to training. When an Audience Type is added to training, only the people in the audience type will be able to view, register, and complete that training.

* Audience Types can be used in prescriptive rules to assign training
* Multiple audience types can be combined in a prescriptive rule
* Audience Types can be used in a Smart List (Not typically recommended - this can overly complicate your criteria and lead to mistakes when criteria is modified)

Name Audience types based on the people included - (MBMC - All Nurses)

* Alternatively, if needed, if a specific training needs to have a non-standard group of users have access, you can name the audience type based on the title of the training. This should be the exception rather than the rule in naming
* Audience types with associations in the system cannot be removed
* ALWAYS look to see if your audience type already exists before going to create a new one
* ALWAYS check to see where the audience type is associated before making modifications to the audience type. Modifications to an audience type that is associated to a prescriptive rule, for example, will modify the assignment rule