KN⬤WLEDGELINK

When you design an assignment profile, you write rules to tell it to look for users with a specific set of attributes. The users who match those attributes are automatically assigned. Assignment profiles are powerful because they are dynamic. A user who moves from one job to another is automatically *unassigned* courses from the old job and then *assigned* courses for their new job.

How to Write Assignment Rules

Assignments are based on Security Domains, Groups, and Rules:

Security Domains	In most cases, you will select "TRUSTEES" and the option to "include subdomains." While there are security domains for individual entities, it is best to use other attributes to assign by entity.
Groups	Each group represents a specific set of rules. A user is assigned if they match ALL rules within a group. • If there are multiple groups, a user is assigned if they match ALL rules in "Group 1" OR all rules in "Group 2" OR all rules in "Group 3" etc.
Rules	The rules in a group are defined by an attribute, operator, and values. For example: • Attribute *Matches* (or *Does Not Match*) specific value(s) • Attribute *Contains* (or *Does Not Contain*) specific value(s) • Attribute *Starts With* (or *Does Not Start With*) specific value(s)

Commonly Used Attributes

The following attributes can be used in assignment profiles.

Attribute	Description / Notes
User ID	The individual user's 8-digit Penn ID (12345678). • If Penn ID is used, the assignment will not be dynamic. It is best to use other attributes so, if an individual's organization ID, job code ID, etc. changes, the assignment is automatically updated based on the new values. • If you must use Penn ID, keep in mind that the assignment should be periodically reviewed for updates and/or deactivated when it is no longer needed.
Job Code ID	The specific job code assigned by HRIS. Examples: HS.K580, HS.J01ITCONS, HS.K541, HS.L62000, HS.01VOL, HS.M3010
Organization ID	The specific organization ID (department) assigned by HRIS. Examples: HS.K435B, HS.J3000, HS.K7410, HS.L2540, HS.UOB71, HS.INSYR

Attribute	Description / Notes
HS Entity	The entity, assigned by HRIS, where the individual works. Refer to the list below.

HS Entity	Entity	Description
HS.CCA	CCA	Clinical Care Associates
HS.CCH	CCH	Chester County Hospital
HS.CRDTC	CCH	CCH Credentialed Employee (Not paid by UPHS)
HS.CORP	CORP	Corporate Services
HS.CPUP	CPUP	Clinical Practices of U of P
HS.DOY	DOY	Doylestown
HS.GSPP	GSPP	Good Shepherd Penn Partners
HS.CRDTL	HUP	HUP Credentialed Employee (Not paid by UPHS)
HS.HUP	HUP	Hospital of the Univ of Penn
HS.LGCHC	LGH	LGH Columbia Center
HS.LGFDN	LGH	LG Health Foundation
HS.LGH	LGH	Lancaster General Hospital (LG)
HS.LGMG	LGH	Lancaster General Medical Grp
HS.LGTHG	LGH	The Heart Group of LG Health
HS.CRDTG	LGH	LGH Credentialed Employee (Not paid by UPHS)
HS.CRDTA	PAH	PAH Credentialed Employee (Not paid by UPHS)
HS.PAH	PAH	Pennsylvania Hospital
HS.HCHS	PMAH	Penn Medicine at Home
HS.PMAH	PMAH	Penn Medicine at Home
HS.CRDTK	PMPH	PMPH Credentialed Employee (Not paid by UPHS)
HS.PMPH	PMPH	Princeton Health
HS.CRDTP	PPMC	PMC Credentialed Employee (Not paid by UPHS)
HS.PMC	PPMC	Penn Presbyterian Medical Center

Attribute	Description / Notes
Hire Date	The user's hire date in the format M/D/YYYY. This attribute is most commonly used in combination with the operators "On or After" and "On or Before." The attribute can be used to limit assignments only to employees hired before or after a certain date. • Transfers and re-hires may not be assigned appropriately if hire date is used in the assignment criteria. • New user accounts created prior to the user's start date will always have the <u>current date</u> as the hire date. (We cannot put a future date in this field.) The date will continue to be updated every day until the user's actual start date.
Item Completion	This attribute allows you to assign based on completion of another course. In other words, everyone who completes this course, and matches the other attributes, will be assigned. • Check the box that appears if you want to include Substitute Completions.
User is a Manager	This attribute allows you to assign based on whether the user has a Team View page. The available options are "Equals Yes" or "Equals No." • Not all users with Team View pages are actual managers. Therefore, we recommend using "Manager Flag" to identify actual managers (see below).
Manager Flag	This attribute is supplied by Pennfor and possible values are "Y" and "N". If the value is "Y" then the user is a manager in Pennfor.
Lawson company and Employee ID	This is the user's Lawson company and employee ID (not Penn ID). This attribute is typically used with the operators "Contains" or "Does Not Contain" to include or exclude employees in company 2000 (payroll resources), company 8888 (non-payroll resources), or 1111 (applicants).

Attribute	Description / Notes
UPHS Job Family	This field may contain the Job Family and subfamily, separated by a dash. For LGH, this field is used to identify clinical, indirect clinical, and non-clinical employees. Examples: INFOTECH-SRVSUPRTOP LGHCLINICA NURSING-INPATNURSG LGHNONCLIN HUMANRES-HRIS LGHINDIREC • Job Family is not typically provided for non-payroll resources (NPR's).
Secondary Work Assignment	If the user holds a second job within the health system, this field may contain the entity, organization, job code, and job family of that second job, separated by dashes. For example, HS.LGH-STUDL-LTCLINICA-LGHCLINICA. • To use this attribute, you will need to create a separate group. Credentials may not be a true representation of whether the user is a provider in the health system. See "NPI Number" below.
Provider Credentials	This fields contains provider credentials (for example, MD, PA, etc.). • The presence of credentials in this field may not always mean that the user is a provider in the health system. See "NPI Number" below.
NPI Number	This field contains the National Provider Identifier and can be used to identify and assign providers. For example, you can use the rule "NPI Number is not empty" to assign all providers.
UPHS Flag	This attribute allows you to assign based on specific codes. The available codes are:

UPHS Flag	Description
MW	Midwife
MD	Physician
NP	Nurse Practitioner
PA	Physician Assistant
RN	Registered Nurse
PCI	Payment Card Industry
FCBC	Franklin Casualty Billing Compliance
BC	Billing Compliance

• Multiple codes, separated by dashes, may be included in this field. Therefore, always use the operator "Contains" or "Does Not Contain" with this attribute. If you need multiple flags in your assignment profile, DO NOT add multiple flags to one group. Each flag requires its own group. |