I-SMART ALERTS

March 2013

Alert Name	Alert Description	Trigger Event/Point
Client Outcomes Due	Indicates the clients who are due for an outcomes survey.	Program enrollment date or outcome(followup) date
GPRA Followup Due	Indicates the ATR clients where a six-month followup GPRA interview is due	GPRA Intake interview date
Client Turning Age {x}	Indicates the clients who are turning a certain age. "When is the next activity due" should be answered with the target age, in days. A target age of 18 would be entered as 6570(18 multiplied by 365). Please note that WITS will add leap year days as appropriate.	Client Date of Birth
Treatment Plan Review Approval Required	Indicates the treatment plan review records where at least one staff person has not signed off	Creation of Treatment Plan Review
Client Group Enrollment Expiring	Indicates the clients whose client group enrollments are about to expire	Client Group Enrollment End Date
Eligibility Determination Due	Indicates the active clients where an eligibility record has been created, but no final determination date has been entered	Created date of Client Eligibility record
Waitlist Client Waiting	Indicates clients who have been on the waitlist for a particular period of time.	Date placed on statewide waitlist
Staff Recertification Due	Notifies Agency Administrator if Staff Certification is due	Certification Expiration Date
Close Discharged Case	Alert for notifying if a discharge has been created more than 30 days ago and the case is still open	Discharge Created Date
Referral Creation	Alert for notifying if a referral is created for a client	Referral Create Date
Expired Collateral Consent	Indicates the active clients where an update to a collateral contact's consent is due	Collateral Contact Consent Expiration Date
SAIS Batch Errors	Informational, for SAIS batch errors . Use the configuration set up to define the desired staff action. Example: "There are some errors in the SAIS batch submission related to your agency data. Please review and update as necessary."	Max sais_message_detail.created_date
Referrals In	Informational, for referrals in. Use the configuration set up to define the desired staff action. Example: "The Referrals are received for a client. Please review and accept referrals."	Max Referred Date
Consent Expiration	Informational, for the expiration of a client consent. Use the configuration set up to define the desired staff action. Example: "The consent has expired for the client. Please check if client is still in treatment at the provider and may require another consent."	Consent Expiration Date
Encounter Released to Billing	Alert for notifying if an encounter is released to billing	Encounter Release to Billing Date
Encounter Creation	Alert for notifying if an encounter is created for a client.	Encounter Create Date
Client Profile Creation	Alert for notifying if a client profile is created for a client	Client Profile Create Date
Discharge GPRA Creation	Alert for notifying if a discharge GPRA is created for a client.	Discharge GPRA Create Date
Followup GPRA Creation	Alert for notifying if a follow-up GPRA is created for a client	Followup GPRA Create Date
Intake GPRA Creation	Alert for notifying if an intake GPRA is created for a client	Intake GPRA Create Date
Treatment Plan Review	Indicates the active clients where a treatment plan has been created and signed off, and a treatment plan review is due	Treatment Plan Review Date
Inactive Client GPRA Discharge	Alert for notifying if client is inactive and if Discharge GPRA must be conducted.	Max of Last Encounter Date and GPRA Interview Date
Client Intake Creation	Informational, for the creation of a client intake. Use the configuration set up to define the desired staff action. Example: "A Client appointment should be scheduled within 5 days of intake. Please schedule an appointment if you have not already done so."	Client Intake Create Date

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March 2013

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Consent Creation	Informational, for the creation of a client consent. Use the configuration set up to define the desired staff action. Example: "The consent should be signed by the client within 10 days of creating the consent. Please secure the client's signature if you have not already done so."	Consent Create Date
Intake GPRA Interview	Alert based on the interview date of the intake GPRA interview.	Interview Date
Initial Treatment Plan	Indicates the active clients where an admission has taken place, but no treatment plan has been created.	Admission Date
ASAM Update	Reminder to update the client's ASAM screen based on the Client's current Program ASAM Level of Care.	Last ASAM Assessment date or enrollment start date
Inactive Client	Indicates the active clients where there has not been an encounter or miscellaneous note for some period of time.	Last Encounter Date or Miscellaneous Note Date