Adding Alerts

Where: Agency > Alert Configuration

Start: To create an alerts click on the **Agency** link located in the left navigation menu. Then click on **Alerts Configuration**.

1. From the "Alert Configuration Search" screen click on the ***Add New Alerts*** link.
2. You should now see the "Agency Alert Configuration Profile" screen appear. Continue by entering the data in the required fields including:
   a. **Configuration Type** will be set to Agency and your context agency will be selected for Agency.
   b. Select an **Alert Type** from the Drop-Down. WITS will fill in the Alert Category, Trigger Point and Description.
   c. Note the **message** that should appear to users. What do you want users to do when they see this alert?
   d. **When is the next activity due (days after the trigger point)?** If the Alert Type is an initial Treatment Plan, the trigger point is an admission date. How many days after the admission date should the initial treatment plan be created?

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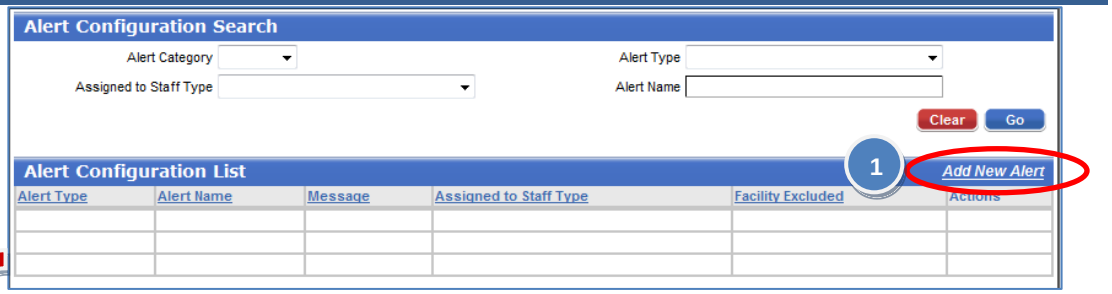

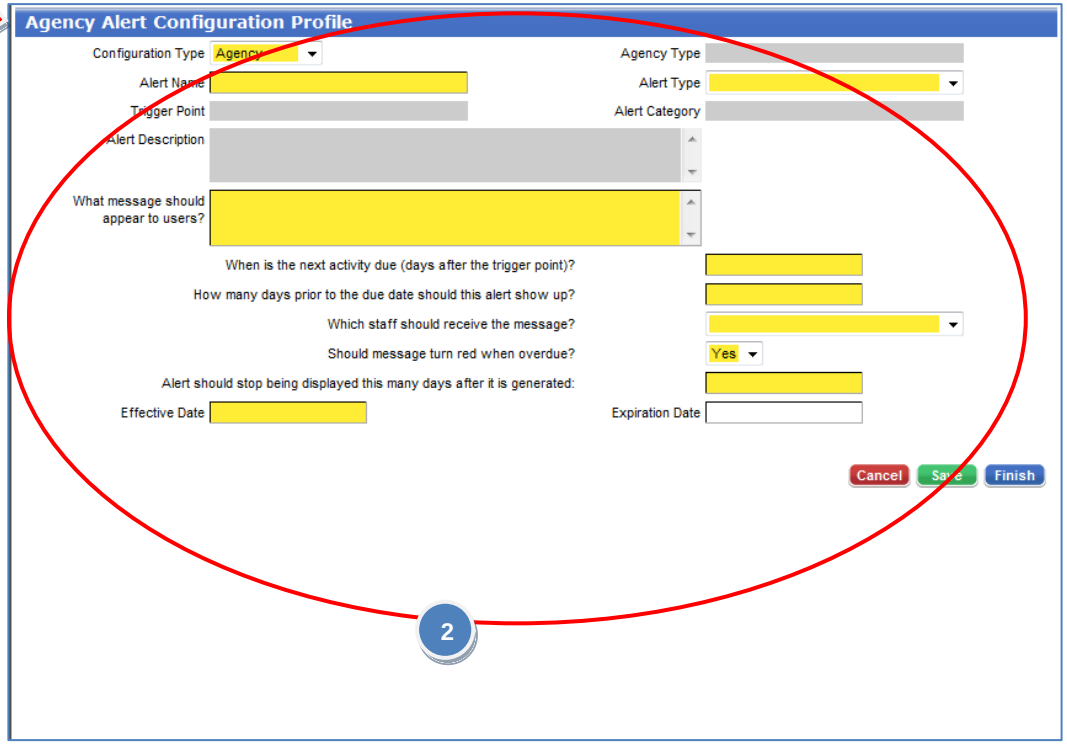

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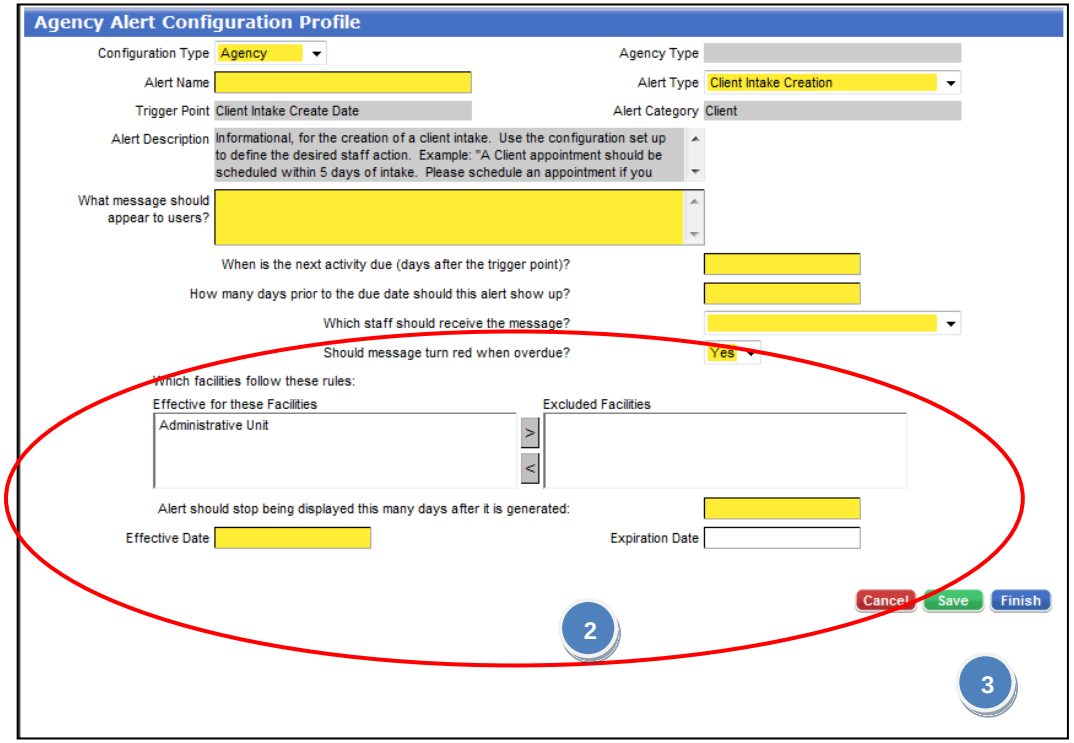
e. **How many days prior to the due date should the alert show up?** If the Initial Treatment Plan is due 30 days after admission, when do you want people notified? 10 days prior?

f. **Which staff should receive the message?** You must choose from a pre-defined list of staff options in the dropdown. NOTE: Initially, alerts do not go to a "specific" staff member that you can select directly. If you want all alerts to go to a specific staff member, choose "Agency Administrator". Agency Administrators have the ability to reassign alerts to specific staff in their agency.

g. **Should message turn red when overdue?** Overdue means that the due date (set in the first question) has passed.

h. **Facility:** When setting up Alerts for a specific agency, you may have the ability to exclude facilities. You can either determine that certain facilities should not get the alert, or they may need a different configuration.

i. **Alert should stop being displayed this many days after it is generated:** In some cases, an alert may no longer be relevant in 10, 30 or 60 days.



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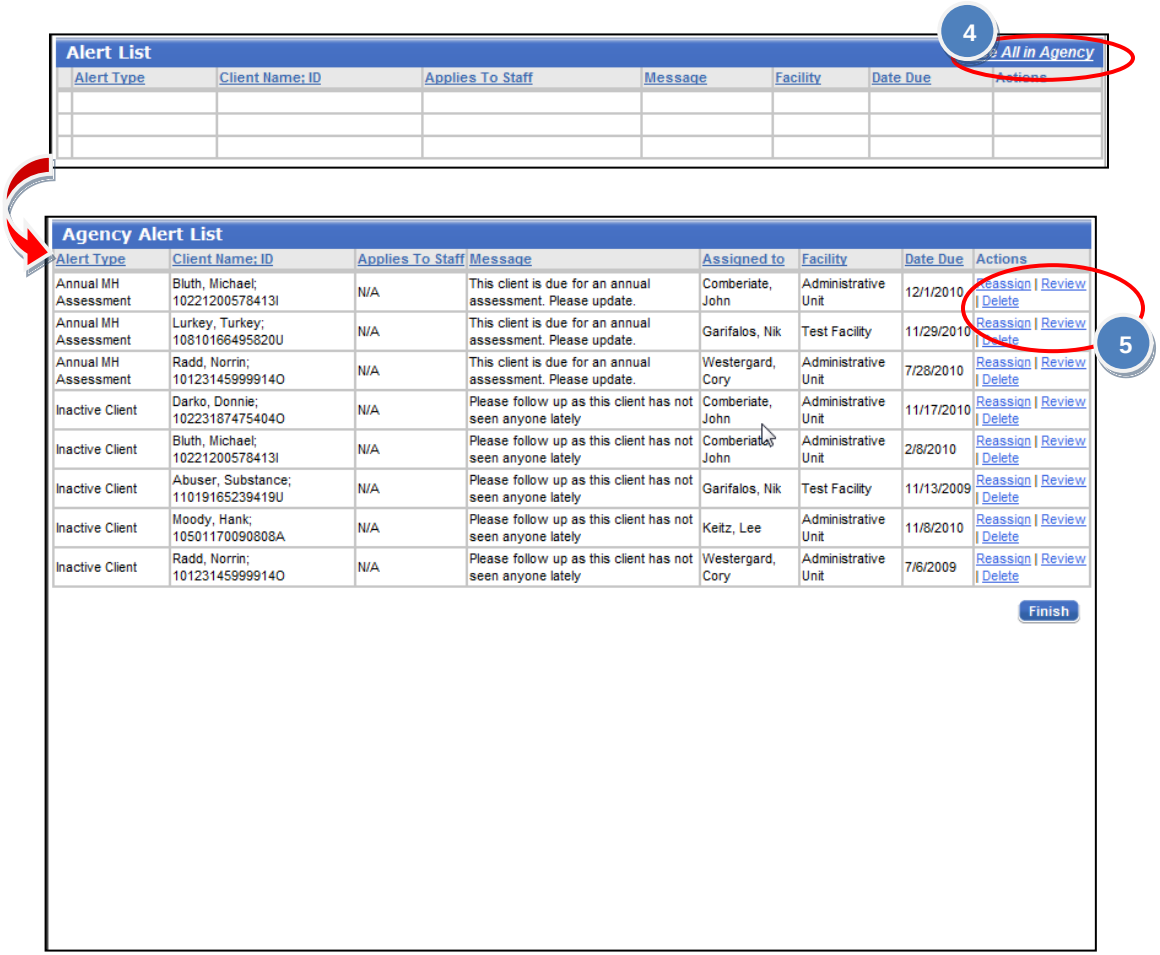
a. You must enter an effective date. You may enter an expiration date if you no longer wish to use this alert configuration.

3. When complete, click on the Finish, or Save buttons.

4. Agency Administrators may have alerts appearing on their own home page. They will also have the "**See all in Agency**" link.

5. When you click on the link, the Agency Alert List appears.
   a. It allows you to view all alerts in the agency to see if particular staff may not be completing work on time.
   b. Delete alerts if they are no longer relevant (if a client leaves treatment)
   c. Reassign alerts to staff.



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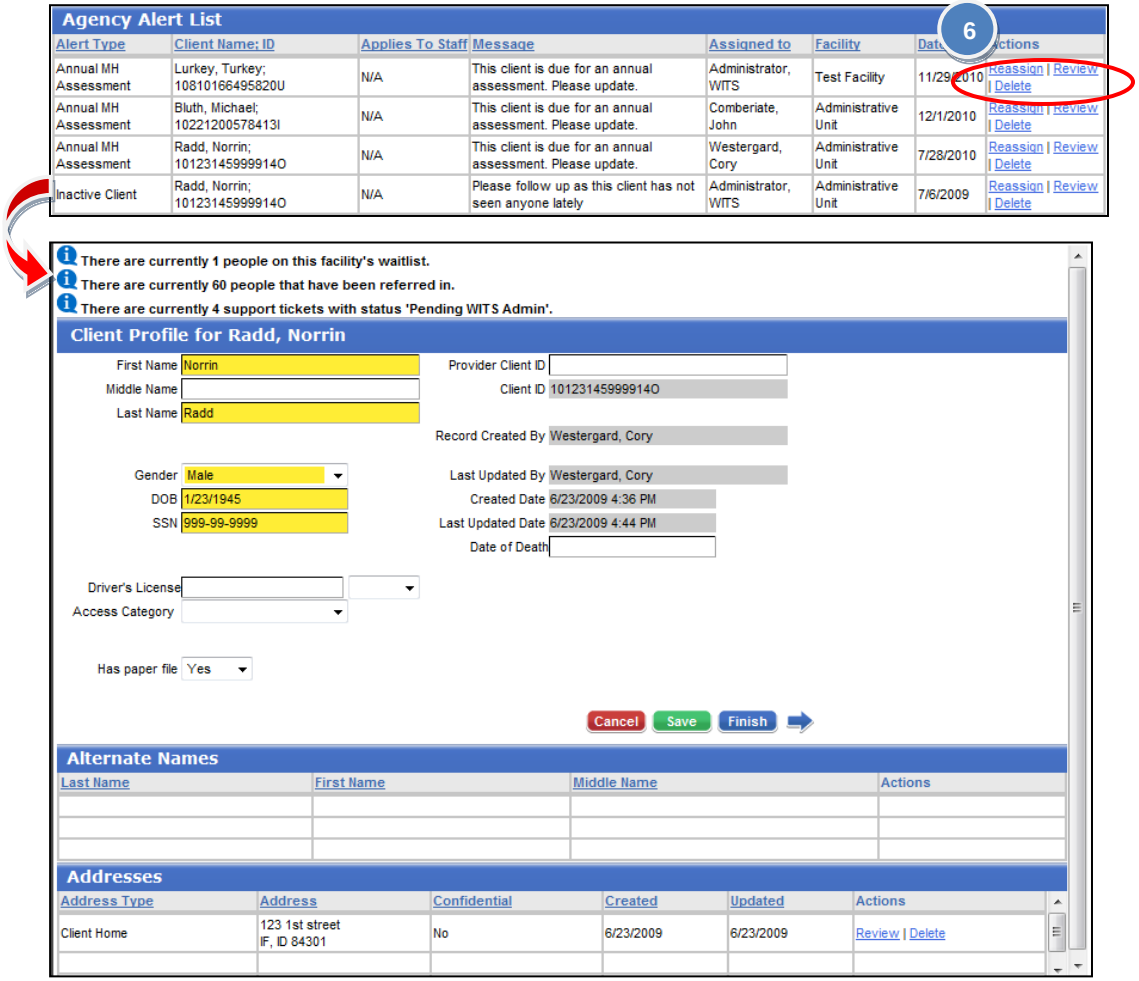
6. When you click on the Review button, it takes you to the screen relevant to the Alert to allow you to take the required action.
   For example, if you are looking at an alert with an alert type "Inactive Client" with the message "Please follow-up as this client has not seen anyone lately", it takes you to the client profile screen to enable you to follow up.



Alert Type	Client Name; ID	Applies To Staff	Message	Assigned to	Facility	Date	Actions
Annual MH Assessment	Lurkey, Turkey; 10810166495820U	N/A	This client is due for an annual assessment. Please update.	Administrator, WITS	Test Facility	11/29/2010	Reassign | Review | Delete
Annual MH Assessment	Bluth, Michael; 10221200578413I	N/A	This client is due for an annual assessment. Please update.	Comberiate, John	Administrative Unit	12/1/2010	Reassign | Review | Delete
Annual MH Assessment	Radd, Norrin; 101231459999140	N/A	This client is due for an annual assessment. Please update.	Westergard, Cory	Administrative Unit	7/28/2010	Reassign | Review | Delete
Inactive Client	Radd, Norrin; 101231459999140	N/A	Please follow up as this client has not seen anyone lately	Administrator, WITS	Administrative Unit	7/6/2009	Reassign | Review | Delete

Alternate Names			
Last Name	First Name	Middle Name	Actions

Addresses					
Address Type	Address	Confidential	Created	Updated	Actions
Client Home	123 1st street IF, ID 84301	No	6/23/2009	6/23/2009	Review | Delete

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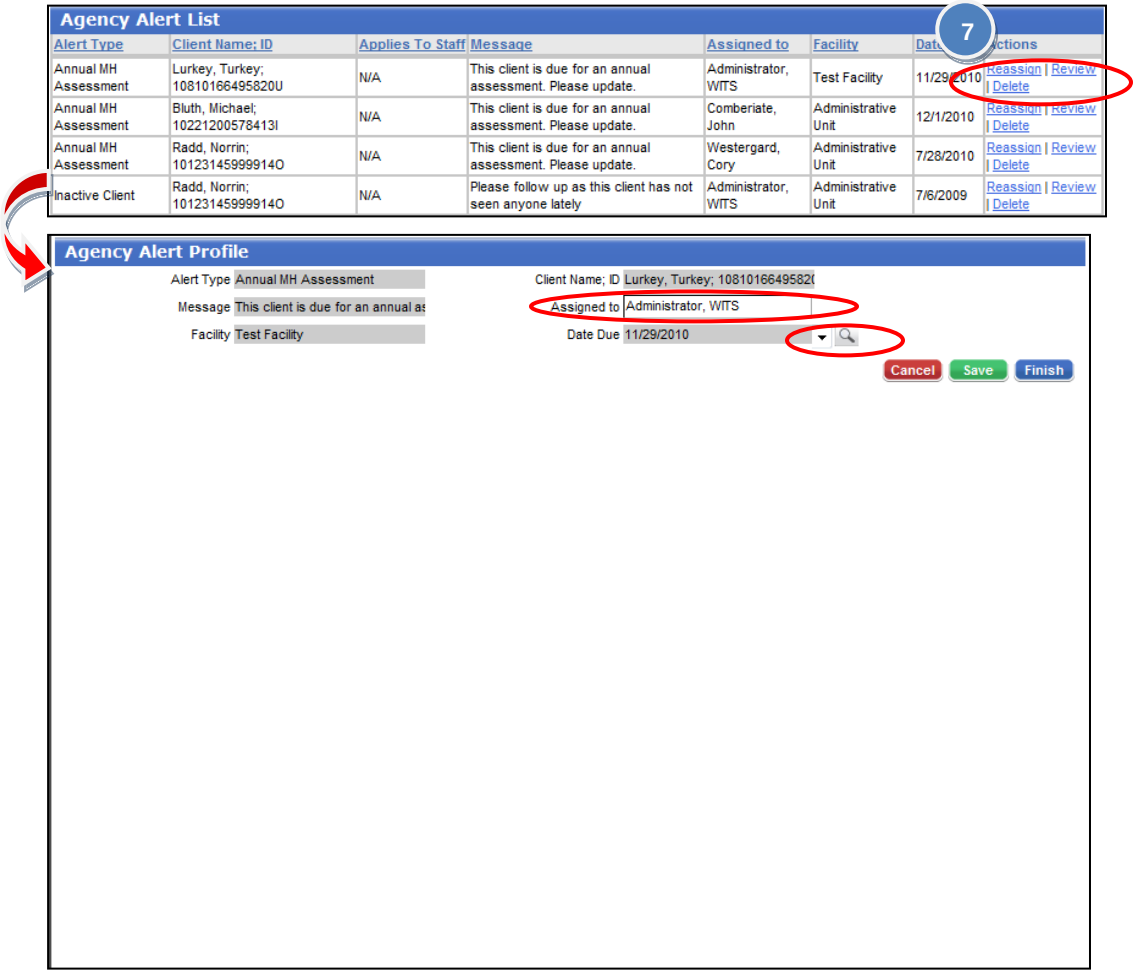
7. When you click on the Reassign button, it takes you to the "**Agency Alert Profile**".
8. To reassign the staff, you need to remove the old name present in the **Assigned To** field and type in the new staff member you would like to assign the alert to.
9. When you type the initial or name of the new staff member, click on the button and then click on the button. The new name will now show up for you to select.
10. When complete, click on the Finish, or Save buttons.



Finish: You have now added and managed alerts.