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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Alert Configuration Search

Alert Category	▼	Alert Type ▼
Assigned to Staff Type	▼	Alert Name

Clear Go

Alert Configuration List

1 Add New Alert

Alert Type	Alert Name	Message	Assigned to Staff Type	Facility Excluded	Actions

Agency Alert Configuration Profile

Configuration Type Agency ▼   Agency Type

Alert Name ___   Alert Type ___ ▼

Trigger Point ___   Alert Category ___

Alert Description ___

What message should appear to users? ___

When is the next activity due (days after the trigger point)? ___

How many days prior to the due date should this alert show up? ___

Which staff should receive the message? ___ ▼
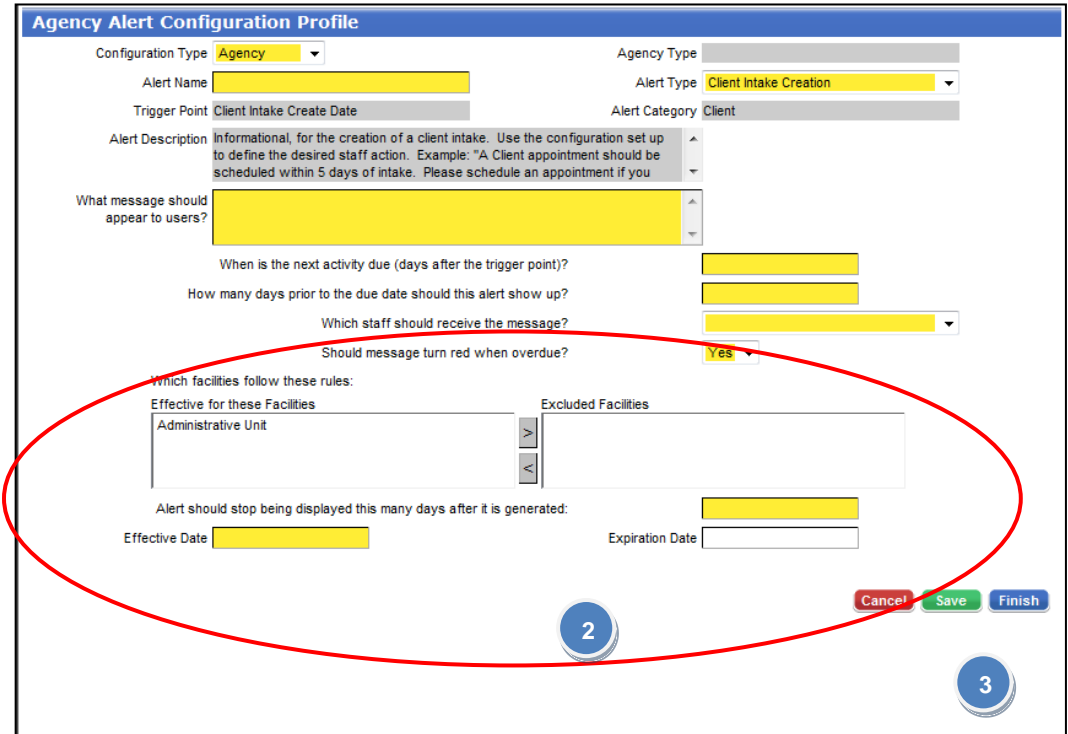
Should message turn red when overdue? Yes ▼

Alert should stop being displayed this many days after it is generated: ___

Effective Date ___   Expiration Date ___

Cancel Save Finish

2

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.

Agency Alert Configuration Profile

Configuration Type: Agency	Agency Type:
Alert Name:	Alert Type: Client Intake Creation
Trigger Point: Client Intake Create Date	Alert Category: Client

Alert Description: 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

What message should appear to users?

When is the next activity due (days after the trigger point)?

How many days prior to the due date should this alert show up?

Which staff should receive the message?

Should message turn red when overdue? Yes

Which facilities follow these rules:

Effective for these Facilities: Administrative Unit

Excluded Facilities:

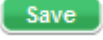Alert should stop being displayed this many days after it is generated:

Effective Date

Expiration Date

Cancel Save Finish

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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.

Alert List — See All in Agency

Alert Type	Client Name; ID	Applies To Staff	Message	Facility	Date Due	Actions

Agency Alert List

Alert Type	Client Name; ID	Applies To Staff	Message	Assigned to	Facility	Date Due	Actions
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	Lurkey, Turkey; 10810166495820U	N/A	This client is due for an annual assessment. Please update.	Garifalos, Nik	Test Facility	11/29/2010	Reassign | Review | Delete
Annual MH Assessment	Radd, Norrin; 10123145999914O	N/A	This client is due for an annual assessment. Please update.	Westergard, Cory	Administrative Unit	7/28/2010	Reassign | Review | Delete
Inactive Client	Darko, Donnie; 102231874754040	N/A	Please follow up as this client has not seen anyone lately	Comberiate, John	Administrative Unit	11/17/2010	Reassign | Review | Delete
Inactive Client	Bluth, Michael; 10221200578413I	N/A	Please follow up as this client has not seen anyone lately	Comberiate, John	Administrative Unit	2/8/2010	Reassign | Review | Delete
Inactive Client	Abuser, Substance; 11019165239419U	N/A	Please follow up as this client has not seen anyone lately	Garifalos, Nik	Test Facility	11/13/2009	Reassign | Review | Delete
Inactive Client	Moody, Hank; 10501170090808A	N/A	Please follow up as this client has not seen anyone lately	Keitz, Lee	Administrative Unit	11/8/2010	Reassign | Review | Delete
Inactive Client	Radd, Norrin; 10123145999914O	N/A	Please follow up as this client has not seen anyone lately	Westergard, Cory	Administrative Unit	7/6/2009	Reassign | Review | Delete

Finish

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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.

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7. When you click on the <u>Reassign</u> 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.

Agency Alert List

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

Agency Alert Profile

Alert Type Annual MH Assessment
Message This client is due for an annual as
Facility Test Facility

Client Name; ID Lurkey, Turkey; 10810166495820
Assigned to Administrator, WITS
Date Due 11/29/2010

Cancel Save Finish