

Creating an Alert for a Client Turning a Certain Age

This alert indicates the clients who are turning a certain age. Please note that WITS will add leap year days as appropriate.

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Agency** to activate the Agency List menu.
2. Select **Alerts Configuration**.
3. Select **Add New Alert**.

The screenshot shows the Idaho-WITS Training application interface. The left navigation pane is expanded to the 'Agency' section. A red circle with the number '1' highlights the 'Agency List' menu item. A red arrow points from this circle to the 'Agency List' menu item. Below the navigation pane, the 'Agency List' table is visible. A red circle with the number '2' highlights the 'Alerts Configuration' menu item in the left navigation pane. A red arrow points from this circle to the 'Alerts Configuration' menu item. The 'Agency List' table has the following columns: Actions, Name, Display Name, and Description. The table contains several rows of agency data, including 'A Managed Service Contractor', 'Auth Period Testing', 'Bonneville County Community Crisis Center', 'Business Psychology Associates', 'D Williams Agency', 'Department of Health & Welfare', 'DHW Child Welfare', 'DHW Contractor', 'Idaho Department of Correction', 'Idaho Dept of Juvenile Corrections', 'Idaho Hope Project', 'Idaho Supreme Ct', 'IDHW, AMH', 'IDHW, CMH', 'IDHW, DBH, Region 1', and 'IDHW, DBH, Region 2'.

The screenshot shows the Idaho-WITS Training application interface. The left navigation pane is expanded to the 'Alerts Configuration' section. A red circle with the number '3' highlights the 'Add New Alert' button in the top right corner of the 'Alert Configuration List' table. A red arrow points from this circle to the 'Add New Alert' button. The 'Alert Configuration Search' section is visible above the table, with fields for 'Alert Category', 'Assigned to Staff Type', 'Alert Type', and 'Alert Name'. The 'Alert Configuration List' table has the following columns: Actions, Alert Type, Alert Name, Levels of care, Include case w/o LOC, Active, Assigned to Staff Type, and Facility Excludes.

4. Enter Alert Name.
5. Select Client Turning Age {x} as the Alert type.
6. Enter the message in What message should appear to users?
7. Complete these fields.
 - 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?

Note: The number 6570 would be the clients 18th birthday.

8. Enter the Number of Days you want this alert to show.
9. Enter the Effective Date.
10. Select Finish.

The screenshot shows the 'Agency Alert Configuration Profile' form in the Idaho-WITS Training system. The form is titled 'Agency Alert Configuration Profile' and includes the following fields and callouts:

- 4:** Points to the 'Alert Name' field, which contains 'Client Turning 18'.
- 5:** Points to the 'Alert Type' dropdown menu, which is set to 'Client Turning Age {x}'.
- 6:** Points to the 'What message should appear to users?' text area, which contains 'Client turning 18'.
- 7:** Points to the 'When is the next activity due (days after the trigger point)?' field, which contains '6570'.
- 8:** Points to the 'Alert should stop being displayed this many days after it is generated' field, which contains '28'.
- 9:** Points to the 'Effective Date' field, which contains '9/25/15'.
- 10:** Points to the 'Finish' button at the bottom right of the form.

Other visible fields include 'Configuration Type' (Agency), 'Alert Category' (Client), 'Trigger Point' (Client Date of Birth), 'Alert Description', 'How many days prior to the due date should this alert show up?' (14), 'Which staff should receive the message?' (Case Assigned To), and 'Should message turn red when overdue?' (Yes). The form also has 'Cancel', 'Save', and 'Finish' buttons at the bottom right.