

# Creating a Fee Determination Due Alert

This alert indicates the active clients where a periodic fee determination is due.

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 interface. The left navigation pane has the 'Agency' menu expanded, with 'Agency List' selected. A red circle with the number '1' is placed over the 'Agency List' menu item. The main content area displays the 'Agency List' table with columns for Actions, Name, Display Name, and Description. A red circle with the number '2' is placed over the 'Alerts Configuration' menu item in the left navigation pane.

Actions	Name	Display Name	Description
	A Managed Service Contractor	A Managed Servi	
	Auth Period Testing	Auth Period Tea	
	Bonneville County Community Crisis Center	Bonneville CCCC	
	Business Psychology Associates	BPA	
	D Williams Agency	D Williams Agen	
	Department of Health & Welfare	State DHW	
	DHW Child Welfare	Child Welfare	
	DHW Contractor	DHW Contractor	DHW TEST CONTRACTOR agency for SUD
	Idaho Department of Correction	IDOC	
	Idaho Dept of Juvenile Corrections	IDJC	
	Idaho Hope Project	Idaho Hope	
	Idaho Supreme Ct	ID Supreme Ct	
	IDHW, AMH	AMH Training	
	IDHW, CMH	CMH Training	
	IDHW, DBH, Region 1	DBH, Region 1	
	IDHW, DBH, Region 2	DBH, Region 2	

The screenshot shows the Idaho-WITS Training interface. The left navigation pane has the 'Alerts Configuration' menu selected. A red circle with the number '3' is placed over the 'Add New Alert' button in the top right corner of the 'Alert Configuration List' table.

Actions	Alert Type	Alert Name	Levels of care	Include case w/o LOG	Active	Assigned to Staff Type	Facility Excluded

4. Enter **Alert Name**.
5. Select **Periodic Fee Determination Due** 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?**
8. Select any **Facilities** this alert *will not* apply to. Use the greater than sign (>) to move them to the box on the right.
9. Enter the **Number of Days** you want this alert to show.
10. Enter the **Effective Date**.
11. 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 a sidebar menu on the left with options like 'Home Page', 'Agency Contacts', 'Agency List', 'GPRAs', 'Facility List', 'Staff List', 'Tx Team Groups', 'System Usage', 'Drug Screening', 'Billing', 'Contract Management', 'Alerts Configuration', 'Vendor Management', 'MU Calculation', 'Group List', 'Clinical Dashboard', 'Authorization Dashboard', 'Client List', 'System Administration', 'My Settings', 'Reports', and 'Support Ticket'.

The main form fields are as follows:

- Configuration Type:** Agency (Callout 4)
- Alert Name:** Periodic Fee Determination Due (Callout 4)
- Alert Type:** Periodic Fee Determination Due (Callout 5)
- Trigger Point:** Last Fee Determination Effective Date
- Alert Category:** Client
- Alert Description:** Indicates the active clients where a periodic fee determination is due
- What message should appear to users?:** Annual Fee Determination Due (Callout 6)
- When is the next activity due (days after the trigger point?):** 364 (Callout 7)
- How many days prior to the due date should this alert show up?:** 30 (Callout 7)
- Which staff should receive the message?:** Case Assigned To (Callout 7)
- Should message turn red when overdue?:** Yes (Callout 7)
- Which facilities follow these rules:**
  - Effective for these Facilities:** Treatment Location 1, Treatment Location 2 (Callout 10)
  - Excluded Facilities:** This is only for facilities you want excluded from this alert (Callout 8)
- Alert should stop being displayed this many days after it is generated:** 364 (Callout 9)
- Effective Date:** 03/11/2015 (Callout 10)
- Expiration Date:** (Callout 9)
- Buttons:** Cancel, Save, Finish (Callout 11)