

# 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**.

Idaho-WITS Training

User: Bastin, Crystal  
Loc: Provider Training Agency, Treatment Location 1  
Client:

Printable View

Home Page  
Agency ▼  
Agency List ▼  
Agency Profile ▶  
Aliases  
Contacts  
Governance ▶  
Relationships ▶  
Announcements  
Referrals ▶  
Removed Consents  
Wait List  
Deleted Clients  
GPRA Discharge Due  
GPRA Followup Due  
Facility List ▶  
Staff List ▶  
Tx Team Groups ▶  
System Usage  
Drug Screening ▶  
Billing ▶  
Contract Management ▶  
Alerts Configuration

Agency Search

Domain

Agency List

Name	Display Name	Description
SA Administrative Agency	Admin Agency	Administrator
D7 Treatment Program	D7 Treatment	
Department of Health & Welfare	State DHW	
Idaho Department of Corrections	IDOC	
Wood Pilot Project	Wood Pilot Proj	
SUD Provider Training Agency	SUD Prov Train	
Women's and Children's Alliance	WCA	
IDHW, AMH Training Agency	AMH Training	
IDHW, DBH, Region 1	DBH, Region 1	
IDHW, DBH, Region 2	DBH, Region 2	
IDHW, DBH, Region 3	DBH, Region 3	
IDHW, DBH, Region 4	DBH, Region 4	
IDHW, DBH, Region 5	DBH, Region 5	
IDHW, DBH, Region 6	DBH, Region 6	
IDHW, DBH, Region 7	DBH, Region 7	

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Billing ▶  
Contract Management ▶  
Alerts Configuration

Alert Configuration Search

Alert Category  
Assigned to Staff Type  
Alert Type  
Alert Name

Clear Go

Alert Configuration List

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

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.

*Note: The number 6570 would be the clients 18<sup>th</sup> 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. It includes the following fields and callouts:

- 4:** Alert Name: Client Turning 18
- 5:** Alert Type: Client Turning Age {x}
- 6:** What message should appear to users?: Client Turning 18
- 7:** When is the next activity due (days after the trigger point?): 6570
- 7:** How many days prior to the due date should this alert show up?: 14
- 7:** Case Assigned To: [Dropdown menu]
- 7:** Should message turn red when overdue?: Yes
- 8:** Expiration Date: 28
- 9:** Effective Date: 3/11/14
- 10:** Finish button