

Creating a Close Discharged Client Alert

This alert is for notifying if a discharge has been created more than 30 days ago and the case is still open.

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 ▾ ← 1
Agency Profile ▶
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GPRA Followup Due
Facility List ▶
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Contract Management ▶
Alerts Configuration ← 2

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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Alerts Configuration
User Management ▶

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 **Close Discharged Case** as the **Alert type**.

6. Enter the message in **What message should appear to users?**

7. Complete these fields.

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. It includes fields for Configuration Type (Agency), Alert Name (Close Discharged Case), Trigger Point (Discharge Created Date), Alert Description (Alert for notifying if a discharge has been created more than 30 days ago and the case is still open), and What message should appear to users? (Close case/intake for discharged client). There are also fields for Agency Type, Alert Type (Close Discharged Case), and Alert Category (Client). A section for 'Which facilities follow these rules' includes 'Effective for these Facilities' (Treatment Location 1, Treatment Location 2) and 'Excluded Facilities' (This is only for facilities you want excluded from this alert). There are also fields for 'When is the next activity due (days after the trigger point)?' (0), 'How many days prior to the due date should this alert show up?' (0), 'Which staff should receive the message?' (Case Assigned To), and 'Should message turn red when overdue?' (Yes). At the bottom, there are fields for 'Alert should stop being displayed this many days after it is generated:' (180), 'Effective Date' (3/11/2014), and 'Expiration Date'. The form ends with 'Cancel', 'Save', and 'Finish' buttons.