

Creating an Inactive Client Alert

This alert indicates the active clients where there has not been an encounter or miscellaneous note for some period of time.

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 ▶
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 (2)

Agency Search
Domain

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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Agency ▼
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GPRA Discharge Due
GPRA Followup Due
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Contract Management ▶
Alerts Configuration
User Management

Alert Configuration Search

Alert Category
Assigned to Staff Type
Alert Type
Alert Name

Clear Go (3)

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 **Treatment Plan Review** as the **Alert type**.

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

7. Complete these fields.

8. Select the appropriate **Levels of Care** this alert applies to. Use the greater than sign (>) to move them to the box on the right.

Note: If you do not select the level of care the alert will not work properly.

9. Select any **Facilities** this alert *will not* apply to. Use the greater than sign (>) to move them to the box on the right.

10. Enter the **Number of Days** you want this alert to show.

11. Enter the **Effective Date**.

12. Select **Finish**.

The screenshot shows the 'Agency Alert Configuration Profile' form. It includes fields for Configuration Type (Agency), Alert Name (Tx Plan Review), Trigger Point (Treatment Plan Review Date), Alert Description (Indicates the active clients where a treatment plan has been created and signed off, and a treatment plan review is due), and What message should appear to users? (Treatment Plan Review Due). There are also fields for Agency Type, Alert Type (Treatment Plan Review), and Alert Category (Client). A section for 'When is the next activity due (days after the trigger point)?' has a value of 15. A section for 'Which staff should receive the message?' has a dropdown set to 'Treatment team Primary care staff mem'. A section for 'Levels of Care' has 'N/A' selected. A section for 'Which facilities follow these rules?' has 'Treatment Location 2' selected. A section for 'Excluded Facilities' has 'Treatment Location 1' selected. The 'Effective Date' is 3/11/2014 and the 'Expiration Date' is 24. The form has 'Cancel', 'Save', and 'Finish' buttons at the bottom right.