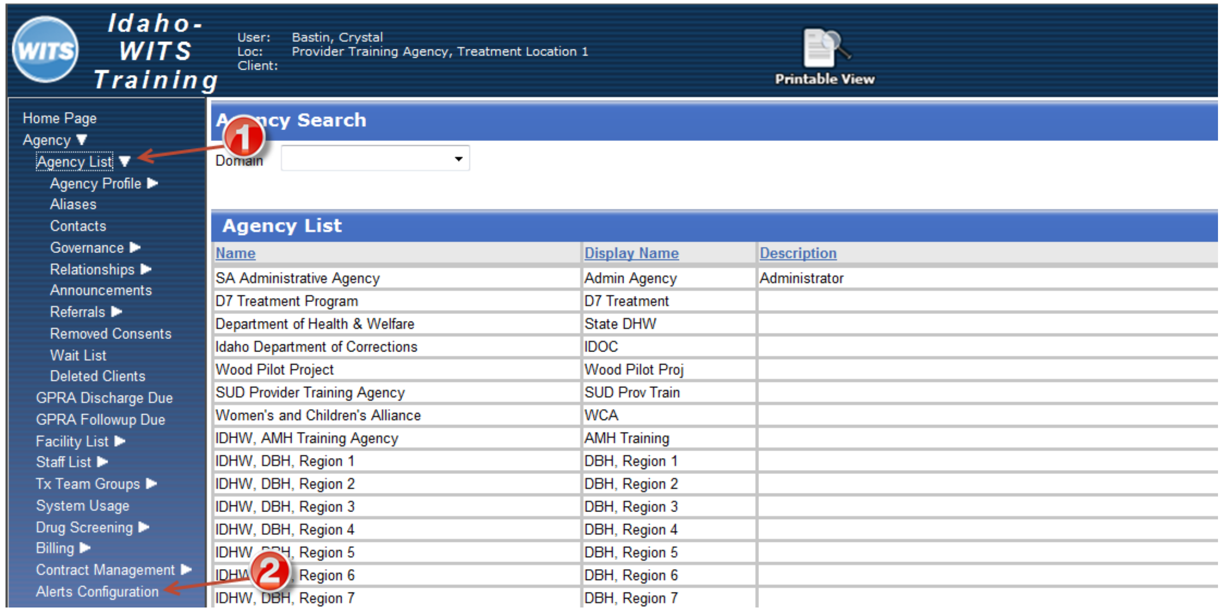
Creating an Inactive Client Alert

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 **<u>Agency</u>** to activate the Agency List menu.

2. Select **<u>Alerts Configuration</u>**.

3. Select **<u>Add New Alert</u>**.



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**.