Manage Alerts - Introduction

Introduction

This HuBERT on-demand training module…

Intro1

… is provided by the MN Department of Health WIC Program. It provides an overview of Manage Alerts.

Display Alerts

Open PF

Today is March 25th.

Let's open Guis' folder.

<no audio> Double-click on Guis Goode in the Participant List.

About

User-defined alerts are temporary messages that display when the first participant folder of a household is opened. They allow us to communicate with other staff and should convey pertinent and timely information about a participant or household.

Only alerts with Active Dates for today or in the past display.

The name is the member in whose Participant Folder that alert was created.

If we scroll…

<no script> Click to the right of the scroll bar.

Scroll

We can see up to…

<no script> Click to the right of the scroll bar.

Scroll1

…250 characters of all the alert texts, as well as the alert type, which should typically be household, but may be individual.

When we select a row….

<no audio> Click the row to select or highlight.

We can also view the entirety of the selected alert text without scrolling.

<no audio> Click when ready to continue.

Delete

We can also delete the selected alert. Since the only alert that still seems pertinent and timely is the December 5th alert with formula approval through May 2019, as best practice, we are going to delete the 11/27 and 8/13 alerts, which both refer to formula approval through November 2018.

<no audio> Click the **Delete Alert** button.

Delete1

<no audio> Message: Are you sure you want to delete the selected text?

<no audio> Click the **Yes** button.

Delete2

<no audio> Click the row to select or highlight. (highlight second row)

Delete3

<no audio> Click the **Delete Alert** button.

Delete4

<no audio> Message: Are you sure you want to delete the selected text?

<no audio> Click the **Yes** button.

Close Alert

We want to keep the December 5th alert, which we've read, and now just need to close the Display Alerts window.

CPA Review Alert

<no audio> Click the **Close** button or press the Enter key.

Open PF1

<no audio> Participant List displays again before opening Participant Folder.

Open PF2

<no audio> Participant Folder opens.

Manage Alerts

Alerts Icon

We can manage alerts using the icon on the toolbar in the Participant Folder...

Menu

...the option in the Participant Activities menu…

CGS Icon

…and in the Certification Guided Script...

About1

<no audio> Click the **Manage Alerts** icon.

About2

The Manage Alert window lists all alerts for the household. No matter whose folder is opened all of the alerts display.

The **Active Date** indicates when the alert will begin to display.

The **Member Name** indicates whose folder the alert was originally created in.

The **Type** is typically household, the other type is Individual

The **Alert Text** displays some of the contents of the alert.

We can scroll to view the rest.

<no audio> Click to the right of the scroll bar to view the rest of the alert.

Scroll

<no audio> Displays the rest of the alert.

Add Alerts

Add Alert

We can Copy Alert to Note, Add, Edit and Delete alerts from this screen.

Let's create a new alert.

<no audio> Click the **Add** button.

Add

The **Alert Date** defaults to the current date. It can be changed to a future date if we want the alert to start appearing later.

The **Alert Type** defaults to **Household**. This allows the alert to display regardless of which household member's Participant Folder is opened. If we were to select **Individual**, the alert would only display when the Participant Folder is opened for the member whose folder is was created in.

In general, there is no reason to set an alert to Individual.

The **Alert Security** section defaults to **Not Protected** and should always remain that way.

Protected alerts cannot be deleted and if an alert shouldn't be deleted, it should be a note...not an alert.

We'll quickly type an alert...

Type Alert

<no audio> Alert typed: Will has been diagnosed as lactose intolerant. Any milk issued should be lactose-free or lactose-reduced. – SM

Since there is no indicator who wrote an alert, it is best practice to add our initials at the end of an alert.

Save Alert

Alerts have a limit of 250 characters.

To save the alert, we simply click OK.

<no audio> Click the **OK** button to save the alert.

Saved

<no audio> Saved alert displays

Copy Alert to Note

Copy Alert

Alerts are supposed to be a method for communicating temporary messages but sometimes an alert should be made a permanent part of the record.

To do this, we can use the Copy Alert to Note function.

<no audio> Click the **Copy Alert to Note** button.

Copy

Before saving, if we need to, we can edit the alert text that should be saved for the note.

Edit Copy

<no audio> Cheese and yogurt are OK (added to current alert text).

Note Subject

We must always select a subject for our note.

<no audio> Click the **Subject** drop-down.

Subject

<no audio> Click below the scroll bar.

Subject1

<no audio> Select **Food Package.**

Participants Grid

Since notes, unlike alerts, are written for individuals and not households, if the alert applies to any other household members we can click their checkbox in the Participants grid and save it as a note to their record also.

In this case, the alert only applies to Will, so we won't select anyone else.

Clicking OK will save the alert to a note in Will's folder.

<no audio> Click the **OK** button or press the Enter key.

Alert after Copy

<no audio> Click to the right of the scroll bar.

Alert after Copy1

Notice the additional text we added to the note about cheese and yogurt was **not** added to the original alert.

Let's take a quick look at the note.

<no audio> Click the **Close** button.

Manage Notes

<no audio> Click the **Manage Notes** icon.

Note

"Alerts" displays under Application Area, which indicates this note was copied from an alert.

The other thing to note, is that the Staff Member listed is the person who copied the alert to the note, **not the person who originally wrote the alert**.

Edit Alerts

Edit

Let's take a quick looking at editing existing alerts. Use the icon to open Manage Alerts.

<no audio – failure hint> Click the icon with the yellow triangle, exclamation point and cog.

Edit1

We want to update the information in the second alert. What should we do to edit it? Go ahead.

<no audio – failure hint> Click the second row to select or highlight it.

Edit2

<no audio – failure hint> Click the **Edit** button.

Edit3

Like any text field, we can simply delete what we don't want…

Edit4

<no audio> Unwanted text is highlighted.

Edit5

<no audio> Pause for automated typing.

…and add our new text.

Remember, our Alert Date can only be today's date or a future date; it can't be a date in the past.

 If we were to click OK now…

Date Message

…this message would display to remind us to update the Alert Date.

<no audio> Message: Active date cannot be less than the current system date.

Edit6

However, we remembered. Go ahead and select today's date for the Alert Date.

<no audio> Click the **Alert Date** drop-down.

Alert Date

<no audio> Click the **Today** button.

Edit7

And save our changes.

<no audio> Click the OK button to save the changes.

Edit8

Since alerts are listed chronologically, with the most recent listed first, our edited alert is now the first row.

Delete Alerts in Manage Alerts

Delete Alert

We can also delete alerts in the Manage Alerts window.

Since we edited what is now the first alert listed, the second alert is no longer pertinent or timely, so as best practice recommends, let's delete it.

How do you think we do that? Go ahead.

<no audio – failure hint> Click the second row to select or highlight it.

Delete Alert1
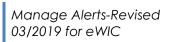
<no audio – failure hint> Click the **Delete** button.

Delete Alert2

<no audio – failure hint> Click the **Yes** button.

Delete Alert3

<no audio> Displays current alerts.

Close

<no audio> Click the **Close** button to exit Manage Alerts.

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.