

# Alert Criteria

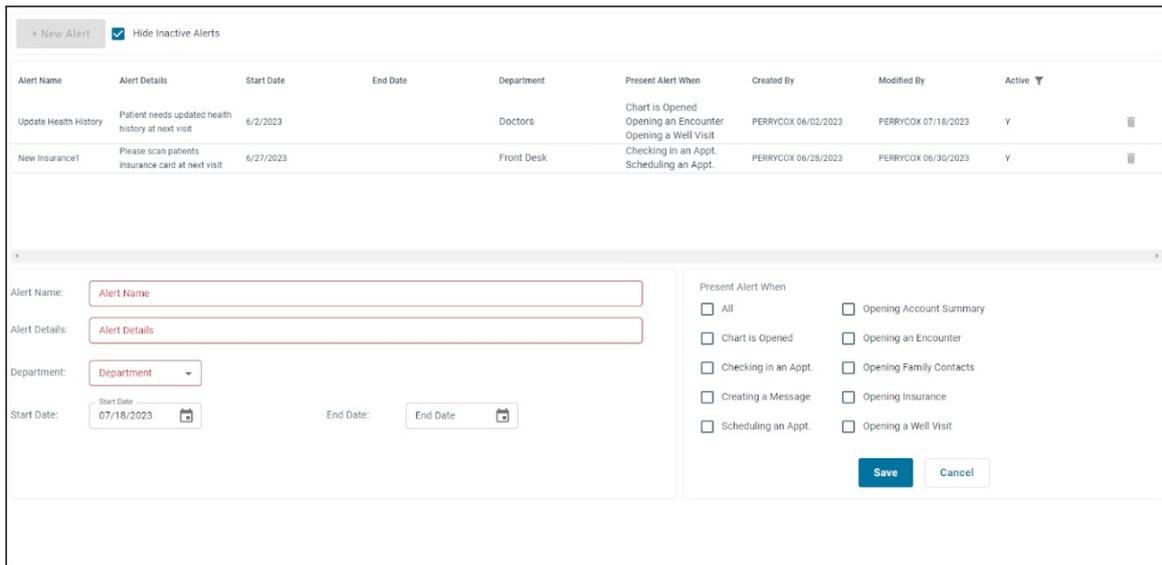
Last Modified on 02/07/2024 3:13 pm EST

Version 21.3

Path: Clinical > Patient Chart > Communication > Alert Setup

## About

This article will go over the fields and criteria around alerts.



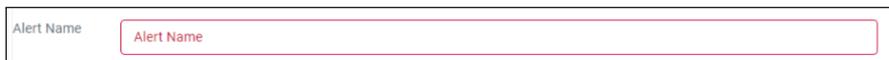
The screenshot shows the 'Alert Setup' interface. At the top, there is a '+ New Alert' button and a checked 'Hide Inactive Alerts' checkbox. Below this is a table of existing alerts:

Alert Name	Alert Details	Start Date	End Date	Department	Present Alert When	Created By	Modified By	Active
Update Health History	Patient needs updated health history at next visit	6/2/2023		Doctors	Chart is Opened Opening an Encounter Opening a Well Visit	PERRYCOX 06/02/2023	PERRYCOX 07/18/2023	Y
New Insurance1	Please scan patients insurance card at next visit	6/27/2023		Front Desk	Checking in an Appt. Scheduling an Appt.	PERRYCOX 06/28/2023	PERRYCOX 06/30/2023	Y

Below the table is a form for creating a new alert. It includes fields for 'Alert Name', 'Alert Details', 'Department' (a dropdown menu), 'Start Date' (with a calendar icon), and 'End Date' (with a calendar icon). To the right of these fields is a 'Present Alert When' section with a list of checkboxes: All, Chart is Opened, Checking in an Appt., Creating a Message, Scheduling an Appt., Opening Account Summary, Opening an Encounter, Opening Family Contacts, Opening Insurance, and Opening a Well Visit. At the bottom right of the form are 'Save' and 'Cancel' buttons.

## Alert Name

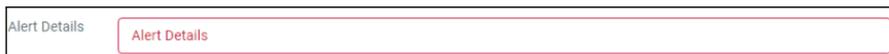
The alert name is **required** when creating an alert and gives a brief description of what the alert is about. The name can have up to 40 characters.



A form field labeled 'Alert Name' with a red border and a red error message 'Alert Name' inside the field.

## Alert Description

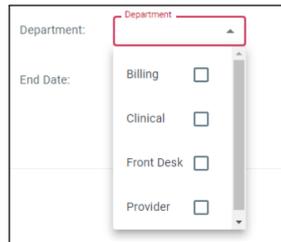
The alert description is **required** when creating an alert and gives the detailed information that will be presented to you. The description can have up to 250 characters.



A form field labeled 'Alert Details' with a red border and a red error message 'Alert Details' inside the field.

## Department

The department is **required** when creating an alert. This is a multi-select drop down containing **all of your practice's departments**. The alert you are creating will only be presented to users within that department.



Department:

End Date:

- Billing
- Clinical
- Front Desk
- Provider

## Copy to Financial Family

The Copy to Financial Family field is an optional field when creating a patient alert. This is **multi-select drop down containing all siblings with the same financial guarantor**. If the patient has no financial family, this option will not appear.

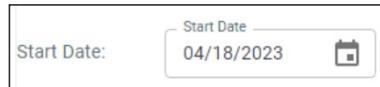
Note: when you edit or update an alert, you cannot propagate the change to a linked sibling. "Copying an alert" will only put the initial information in the sibling's chart. It then becomes an independent alert that will need to be updated and maintained from the sibling's chart.



Copy to Financial Family:

## Start Date

Start Date is **required** when creating a patient alert. It will default with today's date but can be changed if you want an alert to start presenting after a certain date.



Start Date:

## End Date

End Date is an optional field. Entering an end date makes the alert inactive as of that date. It will no longer present itself to users within the specified departments on or after that date.

## Present Alert When

Present Alert When is **required** when creating an alert. This specifies **where** in the workflow the alert should be presented. You can select **one or more** of the following options:

- **All:** The alert will be presented for all listed areas under *Present Alert When*.
- **Chart is Opened:** The alert will be presented when the patient's chart is opened.
- **Checking in an Appt.:** The alert will be presented anytime an arrival time is populated for the patient:
  - Clicking the clock next to arrival time in Add/Edit Appt. Screen or Tracking Screen.
  - Manually entering in an arrival time in the Add/Edit appt. Screen or Tracking Screen.
  - Populating a visit status that sets an arrival time.
- **Creating a Message:** The alert will be presented when the patient is context and messages are opened, the patient is selected in the message window, or the Create New Message button is clicked and that patient is in context.
- **Scheduling an Appt.:** The alert will be presented when the patient is selected in the Add/Edit Appt. Screen.
- **Opening Account Summary:** The alert will be presented when the patient's Account Summary screen is opened.
- **Opening an Encounter:** The alert will be presented when a patient's Encounter is opened.
- **Opening Family Contacts:** The alert will be presented when a patient's Family Contacts is opened.

- **Opening Insurance:** The alert will be presented when a patient's Insurance Screen is opened.
  - **Opening a Well Visit:** The alert will be presented when a patient's Well Visit is opened.
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