

# Patient Alerts Overview and Permissions

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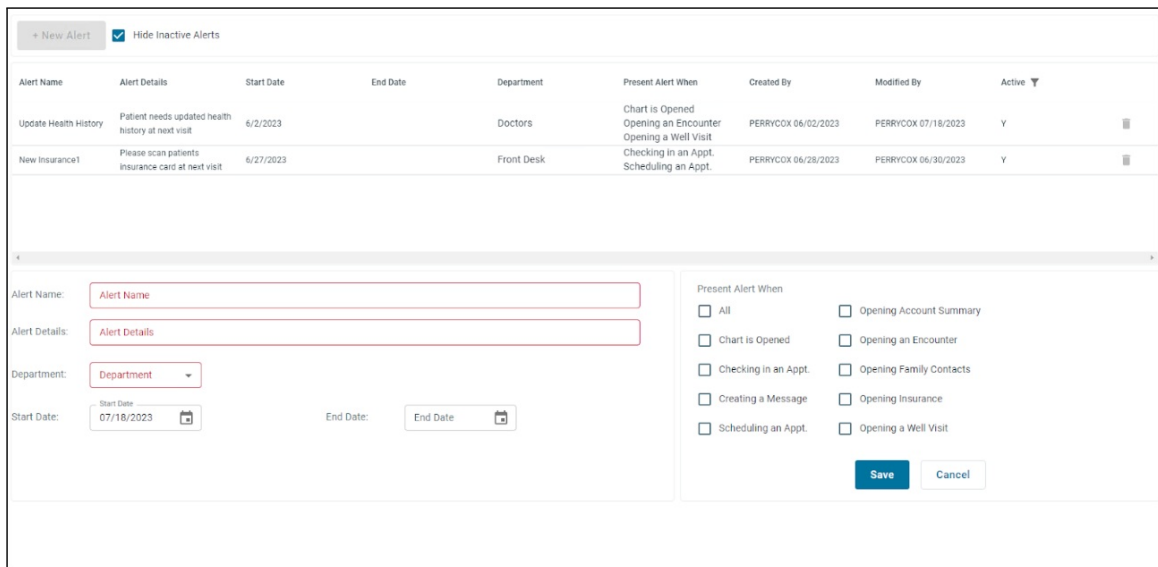
**Path: Clinical > Patient Chart > Communication > Alert Setup**

## About

Patient alerts can be created and managed using the Alert Setup module. This module allows you to create custom patient alerts that will be presented to staff members within the specified departments throughout their workflows.

In the Alerts Module you will be able to:

- Define the alert name and description
- Determine which department(s) the alert is presented to
- Define a timeframe the alert should be active (optional)
- Define where within OP the alerts are presented to the user



The screenshot displays 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 grid of checkboxes for various workflow events: All, Opening Account Summary, Chart is Opened, Opening an Encounter, Checking in an Appt., Opening Family Contacts, Creating a Message, Opening Insurance, Scheduling an Appt., and Opening a Well Visit. At the bottom right of the form are 'Save' and 'Cancel' buttons.

## Security Permissions

There are [security permissions](#) around who can access alerts, who can modify alerts, and who can mark alerts complete through the alert message pop-up.

- **Alerts\_Access:** Allows access to the alerts module found under Patient Communication.
- **Alerts\_Complete:** Allows you to complete the alert when the alert presents itself to you in your workflow.
- **Alerts\_Modify:** Allows you to add, update, and delete alerts.

If all of these permissions are added, please reset the Active form on the Personalize tab, then log off all sessions. Once you do this, you should see the Alerts button.