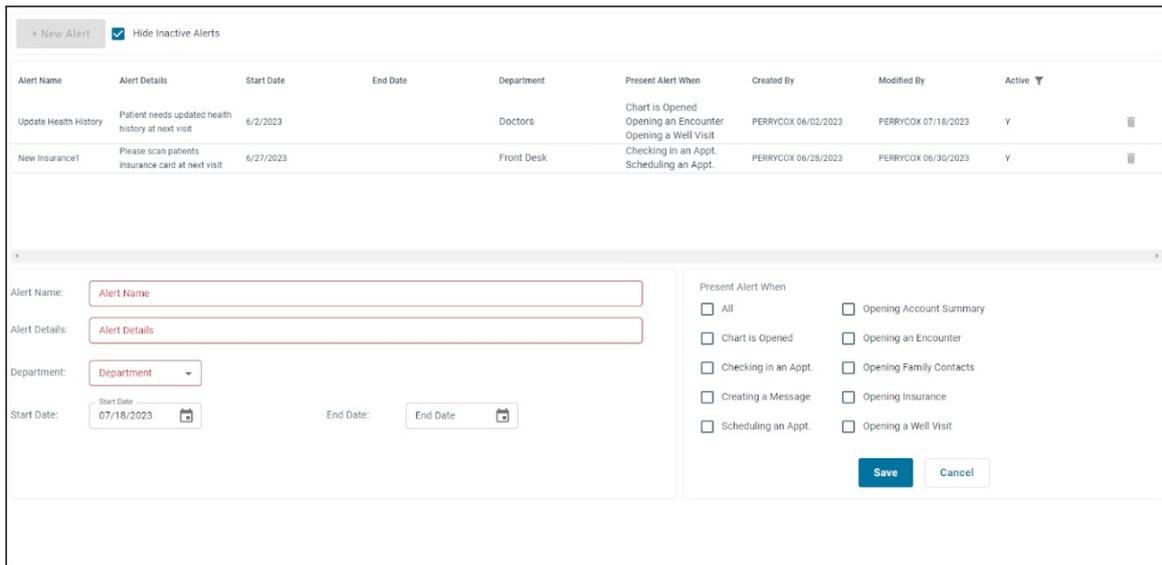# Alert Criteria

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

Version 21.3

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

About

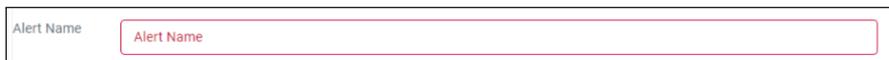This article will go over the fields and criteria around alerts.

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 cahracters.

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.
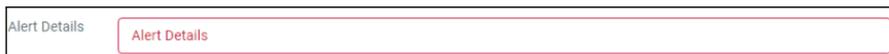
Department

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.
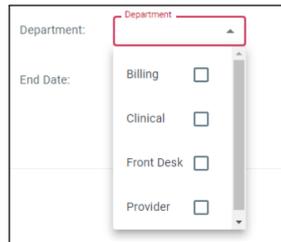
Copy to Financial Family

The Copy to Financial Family field is an optional field when creating a patient alert. This is a **multi-select drop down containing all siblings with the same financial guarantor**. If the patient has no financial family, this option will not appear.
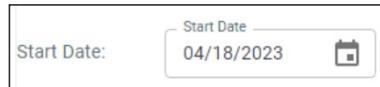
Note: when you edit or update an alert, you cannot propagate the change to a linked sibling.   "Copying an alert" will only put the initial information in the sibling's chart. It then becomes an independent alert that will need to be updated and maintained from the sibling's chart.

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.

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.