

Create, Modify and Delete Alerts

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Path: Clinical > Patient Chart > Communication > Alert Setup

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Create an Alert

If you have the **Alerts_Modify** security permission you will have the ability to create a patient alert.

To Create a new alert:

1. Open a patient's **chart**.
2. Navigate to **Alert Setup** under **Communication**.
3. Click **+ New Alert**.
4. Enter a Name into the **Alert Name** field.
5. Enter what you want the alert to say in the **Alert Description** field.
6. Select one or more departments from the **Department** drop-down list (*optional*).
7. Select a **financially linked sibling** to copy the alert to.
8. Verify the **Start date** and change if needed (*optional*).
9. Enter an **End date** if the alert should only be presented for a specific timeframe (*optional*).
10. Check one or more options under **Present Alert When** section.
11. Click **Save**.

Modify an Alert

If you have the **Alerts_Modify** security permission you will have the ability to modify a patient alert.

To Modify a new alert:

1. Open a patient's **chart**.
2. Navigate to **Alert Setup** under **Communication**.
3. Select the **alert** from the grid.
4. Make the necessary changes.
5. Click **Save**.

Mark an Alert Inactive

Alerts will remain active and continue to present until an **End Date** is entered. Once an end date has been entered the Alert will no longer present **ON** or **AFTER** that date.

The alert can be made visible in the alerts grid by unchecking the **Hide Inactive Alerts** checkbox and can be reactivated by removing the **End Date**.

Alert Name	Alert Details	Start Date	End Date	Department	Alert Presents	Created by	Modified by	Active
Payment Plan	Mother has set up a payment plan. She will pay \$30 every 2 weeks until balance is paid in full.	5/23/2023		Billing	Opening Account Summary	PERRYCOX 05/23/2023	PERRYCOX 06/06/2023	Y
New alert to test a future end date shows	It shows	6/9/2023	6/30/2023	Kaseya	Chart is Opened	PERRYCOX 06/09/2023		Y



Note: Marking an alert complete from the Alert pop-up will put an end date of Today and the alert will no longer present itself.

Delete an Alert

If you have the **Alerts_Modify** security permission you will have the ability to Delete a patient alert.



Warning: Deleting an alert completely removes it from the grid. The only record of it existing will be in the audit log.

To delete an alert permanently:

1. Open a patient's **chart**.
2. Navigate to **Alert Setup** under **Communication**.
3. Select the **alert** from the grid.
4. Click the **Trash Can** icon.
5. A confirmation message will appear:
 - Click **Delete** to delete the alert, *OR*,
 - Click **Cancel** to return to the patient alert setup.

Sort/Filter the Alerts Grid

The columns of the patient alert grid can be sorted or filtered when clicking the **ellipses** next to the column header. Then, you can choose to sort by that column in **Ascending** or **Descending** order, or select the **Filter** button to filter the grid by the specifics you enter for that column.

Alert Name	Alert Details	Start Date ↑	⋮	End Date	Department
New Insurance1	Please scan patient insurance card at	↑ Sort by ASC	Menu		Front De
Update Health History	Patient needs upd health history at n	↓ Sort by DESC			Doctors
		Filter			