Creating an Alert on a Person

OVERVIEW

This User Guide details creating and ending an alert on a person.

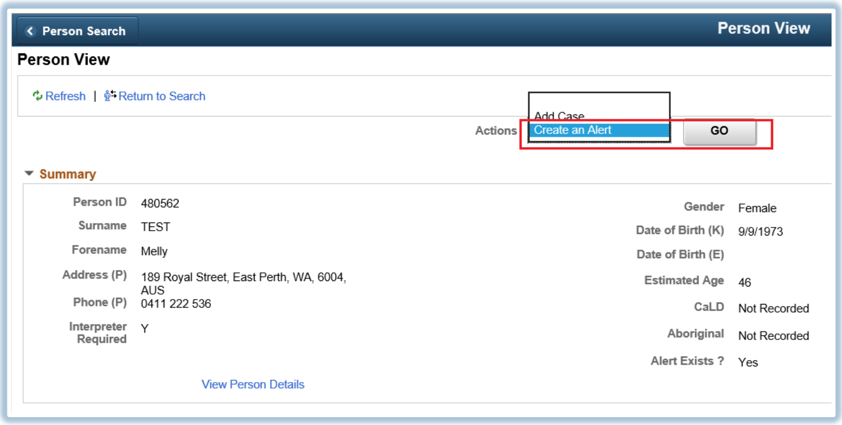
NAVIGATION

On the Home page, click on **Person Search** tile.
Search for the client and select the **Person View** icon

1. CREATING AN ALERT FOR A PERSON:

In the **Person View** of the client

- From the Actions drop down options select **Create an Alert**
- Select GO

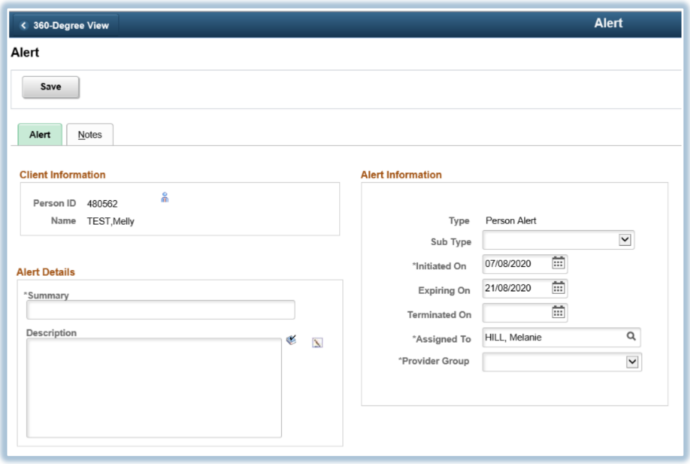


2. ADDING THE ALERT DETAILS:

Complete the following information:

- **Summary**
- **Description**
- **Sub Type**
- **Expiring On**: this is a future date but is <u>not</u> the actual date it expires. The alert will no longer be active once a date has been recorded in **Terminated On**
- **Terminated On**: can leave this field blank. This to be completed when closing the alert.
- **Assigned To**: this will auto-populate with your own details but can be edited.
- **Provider Group**: select your provider group from the dropdown list (if applicable).

Click on Save



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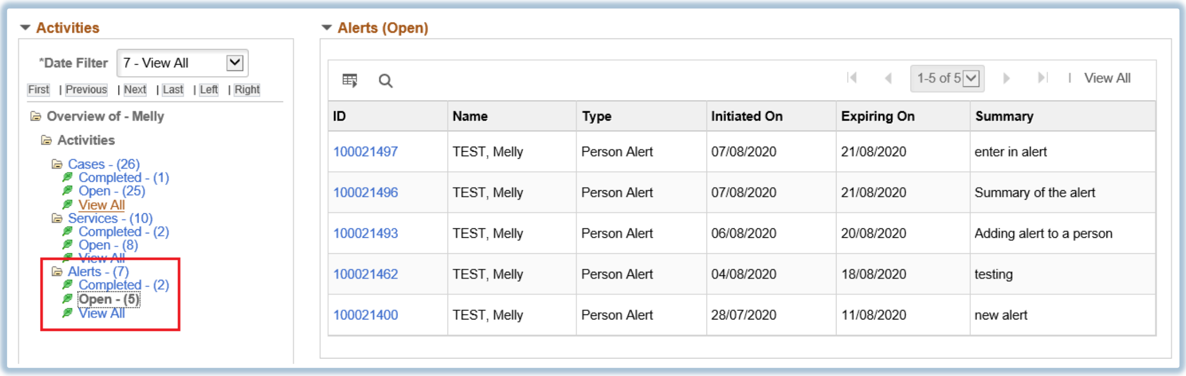
3. NAVIGATING BACK TO PERSON AND VIEWING THE ALERT:

Click on the **Person View** icon in the Alert screen or the **Person View** button in the top left hand corner of the screen.

The alert recorded against a person will be shown in the **Person View** of the person in the tree-view. It will show all Open and Completed alerts for the Person.



4. COMPLETING THE ALERT ON THE PERSON:

Navigate to the **Person View** of the person**.**

From the Activity tree open the Alert by selecting the **Alert ID** hyperlink**.**

In the Alert, enter in the **Terminated On** date.

Click on **Save.** The alert will now be displayed in the 'Completed' section of the tree on the person.

Please Note: After completing the required fields, and saving the page, the screen will become read only.