OP | Webinar Resource Handout:

Creating Timely Patient Specific Alerts

Scenario #1: Adding Permissions for Patient Alerts

Exercise A: Create Permission Groups

1. Navigate to **Practice Management > Staff Directory**
   (OR **Admin>Security Administration)**
2. Click **Security Access**. The Security Permission window opens.
3. Select the Groups Tab

   Note: We will create two groups
4. Click **Create New Group**
   - **a. Alerts View / Complete**
   - **b. Alerts Admin**
5. Assign Permissions
   - a. Group 1- Name group: **Alerts View / Complete**
     - i. Scroll to find **Alerts_Access** on the right-hand side of the grid.
     - ii. Drag and drop **Alerts_Access** under the new group name
     - iii. Scroll to find **Alerts_Complete** on the right-hand side of the grid.
     - iv. Drag and drop **Alerts_Complete** under the new group name
   - b. Group 2- Name group: **Alerts Admin**
     - i. Scroll to find **Alerts_Access** on the right-hand side of the grid.
     - ii. Drag and drop **Alerts_Access** under the new group name
     - iii. Scroll to find **Alerts_Complete** on the right-hand side of the grid.
     - iv. Drag and drop **Alerts_Complete** under the new group name
     - v. Scroll to find **Alerts_Modify** on the right-hand side of the grid.
     - vi. Drag and drop **Alerts_Modify** under the new group name

Exercise B: Assign Users to Groups

1. Select the **Membership** tab
2. Find the **Alerts View/Complete** group on the left-hand side.

3. Find your user on the right-hand side of the grid.
4. Drag and drop your user
5. Find the **Alerts Admin** group on the left-hand side.
6. Find your user on the right-hand side of the grid.
7. Drag and drop your user into this group
8. Permission Activation
    a. If cloud, you will need to log off all sessions for permissions to take effect
    b. If server, close OP and reopen
9. Take home: Repeat these steps of assigning permissions to any additional staff	

Exercise C: Confirm Access 1. Clinical>Patient Chart> Search for Mary Testpatient (ID:99) or a test patient of your choice 2. Within the chart, scroll to see Alert Setup under Communications on the left-hand side 3. Select Alert Setup	

Scenario #2: Latex Allergy **Alert type: All Departments** You have a patient that requires a patient alert to be known by all. This is something you would want everyone to see.	

Exercise A: Create an Alert
 	
1. If not already in the chart navigate to Clinical>Patient Chart> Select Testpatient
2. Navigate to Communication>Alert Setup
3. Click + New Alert
4. Enter required fields
    a. Alert Name: Latex allergy
    b. Alert Description: Latex Allergy!!! (This will display to users)
    c. Department: Select All
    d. Start Date: Today
    e. End Date: Leave Blank (We don't want this to expire)
    f. Present Alert When:
        i. Chart is Opened
        ii. Checking in an Appt
        iii. Opening an Encounter
        iv. Opening a Well Visit
5. Save
6. Close the chart	

In Workflow Notification:
1. Reopen your test patient chart to see how the alert will appear upon opening.
2. Options Presented
    a. **Acknowledge**: Clicking OK - Pop-up presented when action is performed again
    b. **Suppress**: Check Suppress- Suppresses alert until log out and back into OP
    c. **Complete**: Checking Complete- Enters an end date of today + makes alert inactive
3. For your user to not be presented with this alert again today select ________ (choose a,b, or c)	

Outcome: You created an APB alert for all to see.	

Scenario #3: Sign Updated Form **Alert type: Multiple departments** You need a parent/guardian to sign an updated form. You will create an alert for two departments	

Exercise A: Create an Alert
 	
1. If not already in the chart, navigate to Clinical>Patient Chart> Select Testpatient
2. Navigate to Communications>Alert Setup
3. Click + New Alert
4. Enter required fields
    a. Alert Name: Update Form
    b. Alert Description: Parent needs to sign an updated HIPAA disclosure form.
    c. Department:
        i. Front Desk
        ii. Billing
    d. Start Date: Today
    e. End Date: Leave Blank (We don't want this to expire)
    f. Present Alert When:
        i. Checking in an Appt
        ii. Opening Insurance
5. Save
6. Close the chart	

In Workflow Notification:
Note: Must be part of Billing and Front Desk Departments to confirm workflow
Reopen your test patient chart to see how the alert will appear upon opening.
1. Options Presented
    a. **Acknowledge**: Clicking OK - Pop-up presented when action is performed again
    b. **Suppress**: Check Suppress- Suppresses alert until log out and back into OP
    c. **Complete**: Checking Complete- Enters an end date of today + makes alert inactive
2. If the parent completed the form, which option should be selected? Choose a,b, or c ________	

Outcome: You created an alert for two departments to see	

Scenario #4: Vaccine Counseling **Alert Type: One Department (Clinician)** The patient is a candidate for PCV20 for high risk, talk to mom	

Exercise A: Create an Alert
Note: Must be part of Provider Departments to confirm workflow
 	
1. If not already in the chart, navigate to Clinical>Patient Chart> Select Testpatient
2. Navigate to Communications>Alert Setup
3. Click + New Alert
4. Enter required fields
    a. Alert Name: Counseling-Vaccine
    b. Alert Description: Candidate for PCV20 for high risk, talk to mom
    c. Department:
        i. Providers *(if you don't have a Provider department, choose the department that would make the most sense for your office)*
    d. Start Date: Today
    e. End Date: Leave Blank (We don't want this to expire)
    f. Present Alert When:
        i. Chart is Opened
        ii. Opening an Encounter
        iii. Opening a Well Visit
5. Save
6. Close the chart	

In Workflow Notification:
1. Reopen your test patient chart to see how the alert will appear upon opening.
2. Options Presented
    a. **Acknowledge** Clicking OK - Pop-up presented when action is performed again
    b. **Suppress**: Check Suppress- Suppresses alert until log out and back into OP
    c. **Complete**: Checking Complete- Enters an end date of today + makes alert inactive
3. In the event, the patient was seen for gastroenteritis and vaccine counseling was not on the top of the list, which option would be selected? Choose a,b, or c ________	

Outcome: You created an alert for one department to see	

Bonus- Scenario #5 : 💡 **One person-as-their-own-department**
For the staff member, perhaps the clinician, who likes a lot of reminders, and sticky notes, create that individual as their own department

Notes: This person should be assigned the permission groups of Alerts Admin.
Departments cannot be deleted

Exercise A: Create Department
Note: Departments cannot be deleted

1. Practice Management>Reference Data>Departments
2. Select +
3. Department Name: Name of Individual
4. Select Color
5. Select Checkmark

Exercise B: Assign Department
1. Practice Management>Reference Data>Staff/Providers
2. Select Staff Member
3. Department
    a. + Add new department

Exercise C: Create Alert (s)
1. If not already in the chart, navigate to Clinical>Patient Chart> Select Testpatient
2. Enter required fields
    a. Alert Name: Reminder
    b. Alert Description: Patient recently moved
    c. Department:
        i. Name of Individual
    d. Start Date: Today
    e. End Date: Leave Blank (We don't want this to expire)
    f. Present Alert When:
        i. Chart is Opened
        ii. Opening an Encounter
        iii. Opening a Well Visit
    g. Optional - If the patient is part of a financial family, you can consider copying the alert to a member of the financial family
        i. Important Notes:
            1. Copying an alert is only available when creating an alert
            2. No linkage - once copied to a sibling it becomes an independent alert
3. Save

Outcome: You created an alert for one department to see!

Office Practicum