



# Patient Alerts

*Creating Timely Patient Specific Alerts*

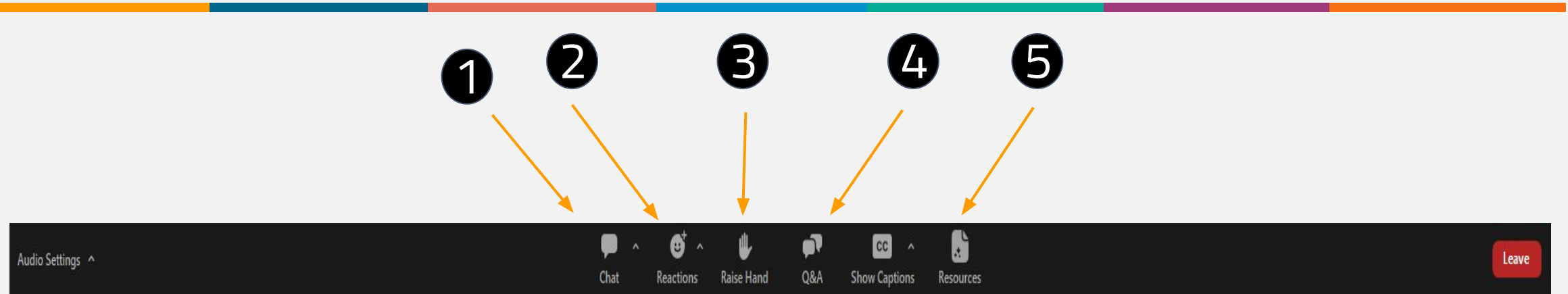


# Speaker

**Jeannine Hathaway**  
Director of Training



# Navigating Zoom



All attendees will be muted during this webinar.

1. **Chat** - Please enter additional team members names, who have not registered for the webinar.
2. **Reactions** - Use this to react with smile, like thumbs up, or celebrate emoji.
3. **Raise Hand** - Attendees can raise hand to alert trainer you have a question. Please add your question to the Q&A tab.
4. **Q&A** - Send questions throughout the webinar to organizer and panelists
5. **Resources** - Are available to download during the session

# Why Patient Alerts?



## **Problem:**

Unable to create patient specific alerts that would be visible when opening the chart and something more robust than...  
@@ in Billing and Misc Notes.

## **Solution:**

Patient Alerts were created

# Patient Alerts Overview



+ New Alert

Hide Inactive 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

Alert Name:

Alert Details:

Department:

Start Date:

End Date:

### Present Alert When

- All
- Chart is Opened
- Checking in an Appt.
- Creating a Message
- Scheduling an Appt.
- Opening Account Summary
- Opening an Encounter
- Opening Family Contacts
- Opening Insurance
- Opening a Well Visit

Save

Cancel

# Objectives



- At the end of this webinar you will be able to:
  - Use Patient Alerts
  - Navigate Patient Alerts
  - Set up Access
  - Activate Patient Alerts
  - Create Patient Alerts

# Security Permissions

## Alerts\_Access:

Allows access to the alerts module found under Communication in the patient's chart

## Alerts\_Complete:

Allows you to complete the alert when presented to you within your workflow

## Alerts\_Modify:

Allows you to create, update, and delete alerts

💡 Create a permission group or groups

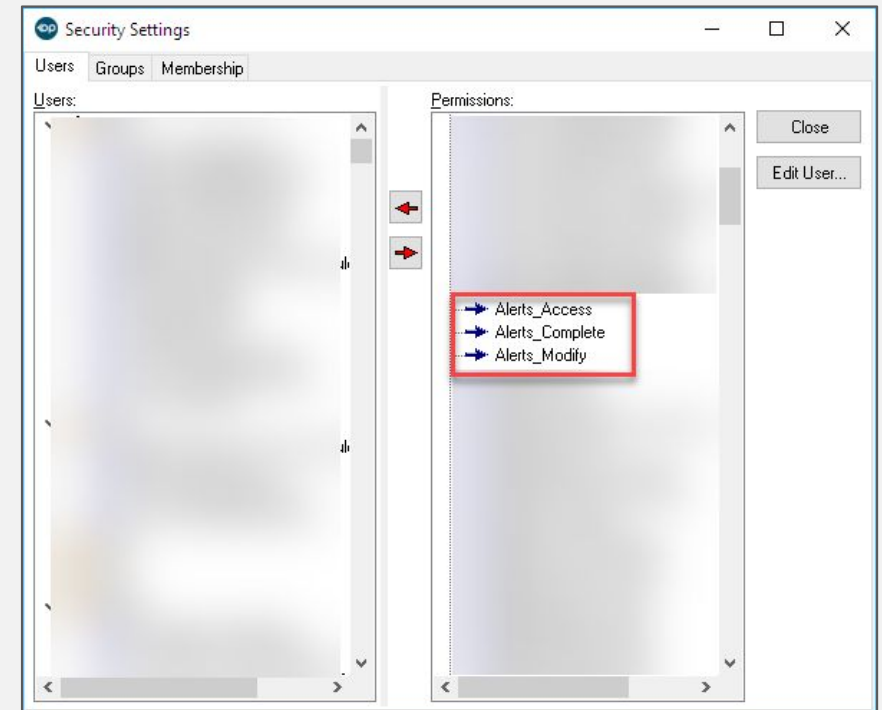
Considerations:

- Alerts View / Complete
  - Alerts\_Access
  - Alerts\_Complete
- Alerts Admin
  - Alerts\_Access
  - Alerts\_Complete
  - Alerts\_Modify

👤 Who should have the ability to create alerts?

Considerations:

- Leadership roles in each functional area



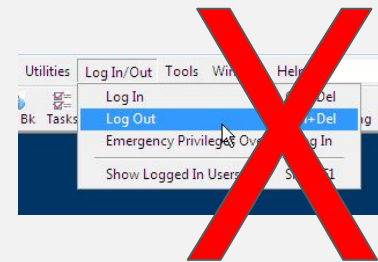
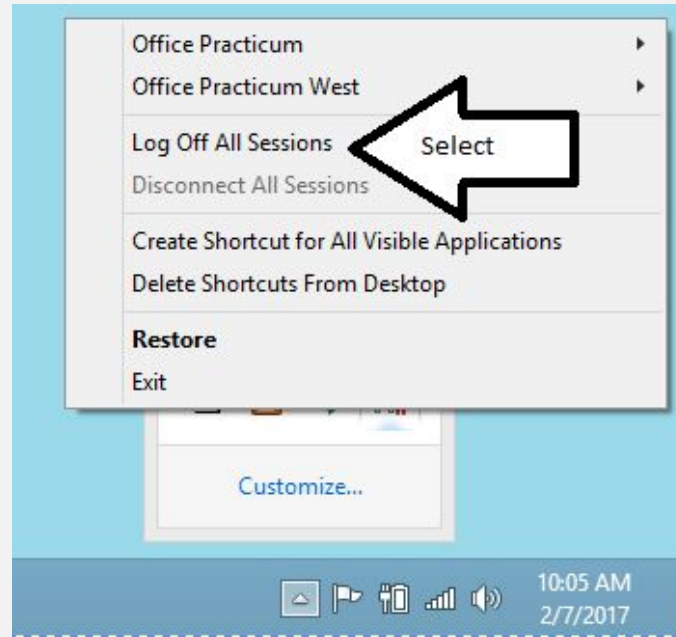
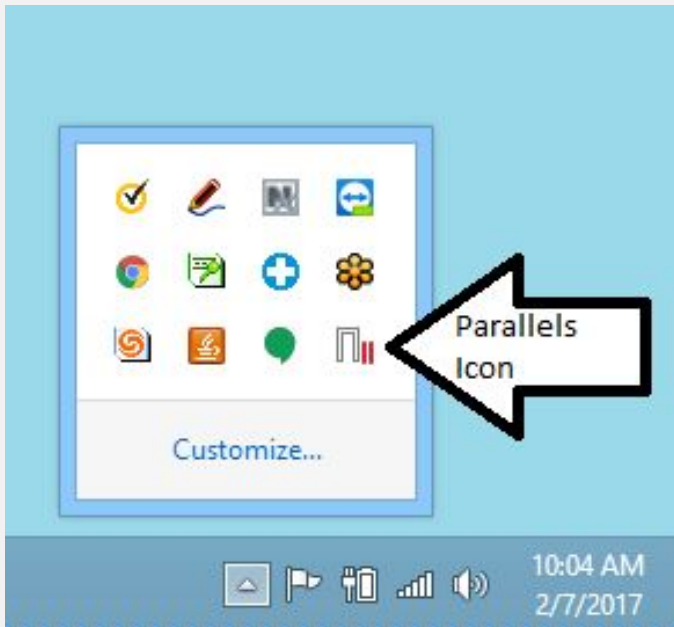


## Activity 1: Permissions



# Log off all Sessions

Find the Parallels icon in your taskbar (bottom right corner of your screen where you find the time and date). Right-click the Parallels icon and select Log Off All Sessions.



Logging out of OP is **not** the same as doing a Log Off All Sessions.



# Types of Alerts

# Department Use Cases- Tips and Tricks

**Alert Details**


Alert Name:

Alert Details:

Department:

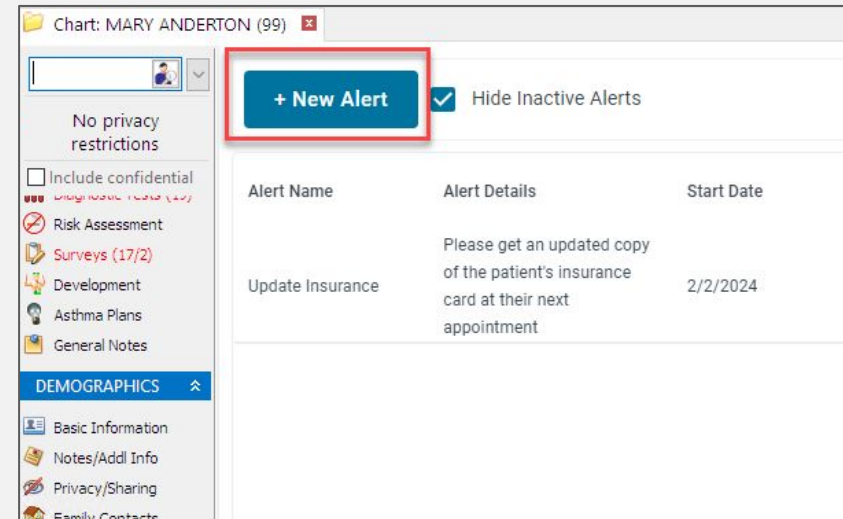
- SELECT ALL
- Billing
- Doctor
- Front Desk
- Integration Test

Department Use Cases by Dr. Suzanne Berman (Shared via Listserv)

- **All Departments:** for a true APB type situation
  - eg. when chart is opened or creating a message "We have been trying for weeks to reach mom about X! Next time she calls...."
- **Multiple Departments** (usually reception + billing OR clinicians + nurses) for clerical vs clinical needs -- "Mom needs to sign updated XYZ form" "Hep C RNA next time kid comes in"
- **One department** - like the above...
  - Often clinicians only if it needs to be a medical conversation with the family "Kid is candidate for PCV20 for high risk, talk to mom"
-  **One person-as-their-own-department**
  - You may have a clinician who is like Reminder Rita.
    - She loves putting lots of "sticky notes" on the chart for herself to remind herself about things. That way she has multiple things front of mind when she sees a kid. She loves it! However, because historically she was putting these notes-to-self in Tasks and the General Notes, it got to the point where the other providers (one in particular, who likes her charts clean lean and mean) was going bonkers.
    - So we made a Rita-Only department (of 1.) She can now make all her own popups and messages and reminders and so on and address them to her own Department of One so NO ONE ELSE HAS TO SEE THEM. It has led to great joy, peace, harmony, and prosperity :)

# Creating a Patient Alert

- Requires Alerts\_Modify permission
- Click + New Alert
- Enter required fields
- Click Save
- Missing fields will display in Red text below Save and prevent you from saving alert



Alert Name	Alert Details	Start Date
Update Insurance	Please get an updated copy of the patient's insurance card at their next appointment	2/2/2024



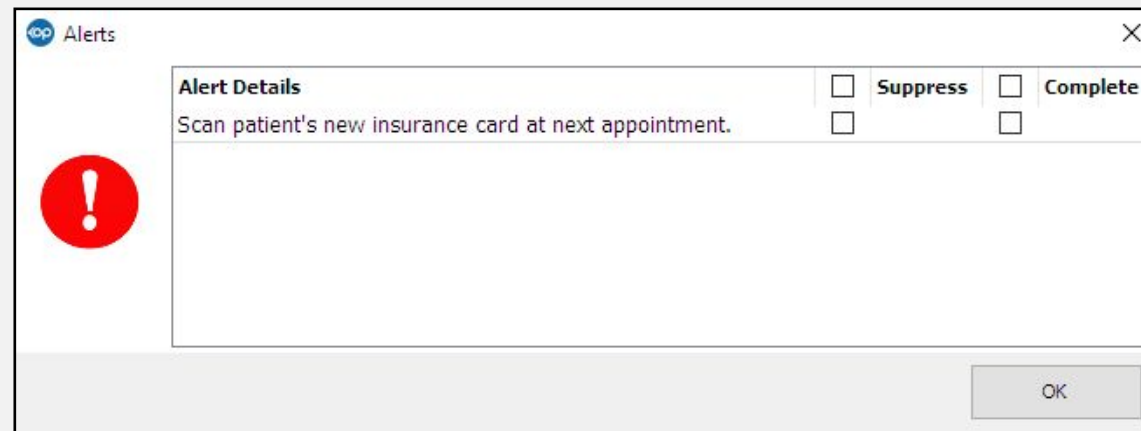
The following field(s) are required: Alert Name, Alert Details, Department, Present Alert When.



**Activity 2:**  
**Alert Type: Alert for all Departments**

# In Workflow Notification

Acknowledgement	Suppressing	Completing
Clicking OK	Check Suppress	Checking Complete
Pop-up presents when action is performed again	Suppresses alert until log out and back into OP	Enters an end date of today + makes alert inactive





**Activity 3:**  
**Alert Type: Multiple Departments**



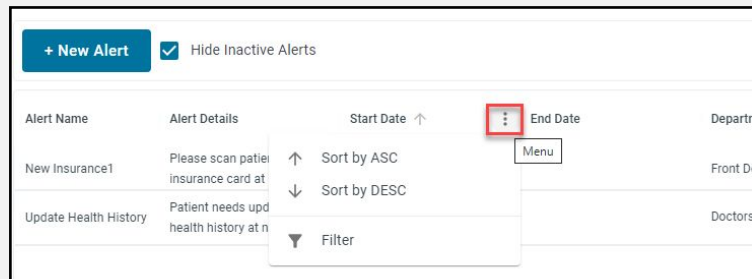
**Activity 4:**  
**Alert Type: One Department**



# Managing Patient Alerts

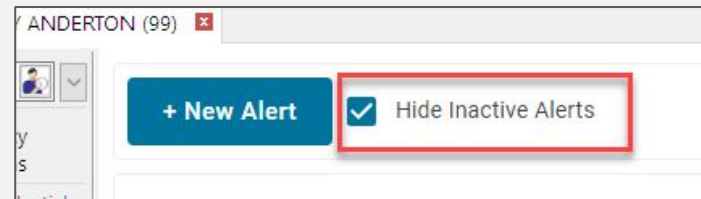
## Viewing Alerts

- Sorting on any column
- Filtering
  - Hover over column
  - Click ellipses



## Inactivating Alerts

- Alerts will present until an End Date is entered
- Alerts will no longer present ON or AFTER the end date
- To view inactive alerts, uncheck Hide Inactive Alerts



## Deleting Alerts

- Permanently removes from system
- Click Trash Can in the grid next to alert

# Inactivating vs. Deleting Alerts

*BOTH actions requires Alerts\_Modify permission*

## Deleting Alerts

- Permanently removes the alert record
- Only record of it existing is in the audit trail

## Inactivating Alerts

- Allows you to keep record of the alert
- Can re-use again but removing end date



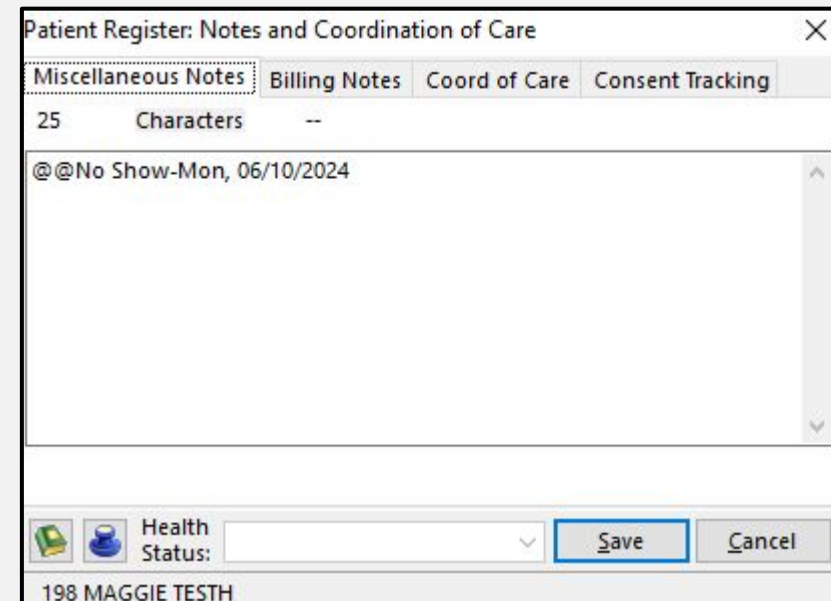
**★ Bonus Activity 5 ★**  
**Alert Type: One Person Department**

# But what about @@?

@@ in Miscellaneous and Billing Notes Notes are still functional for cross functional teams to create a pop up alert, without all the the admin access of Alerts\_Modify

## Alerts\_Modify:

Allows you to create, update, and delete alerts



Patient Register: Notes and Coordination of Care

Miscellaneous Notes | Billing Notes | Coord of Care | Consent Tracking

25 Characters --

@@No Show-Mon, 06/10/2024

Health Status:  Save Cancel

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# Appendix Resources

# Accessing Alert Setup



## Navigation:

Practice Management > Patient Chart > Alert Setup under Communications

[+ New Alert](#)  Hide Inactive 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	

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Alert Name:

Alert Details:

Department:

Start Date:

End Date:

Present Alert When

- All
- Chart is Opened
- Checking in an Appt.
- Creating a Message
- Scheduling an Appt.
- Opening Account Summary
- Opening an Encounter
- Opening Family Contacts
- Opening Insurance
- Opening a Well Visit

# Alert Criteria

## Alert Name

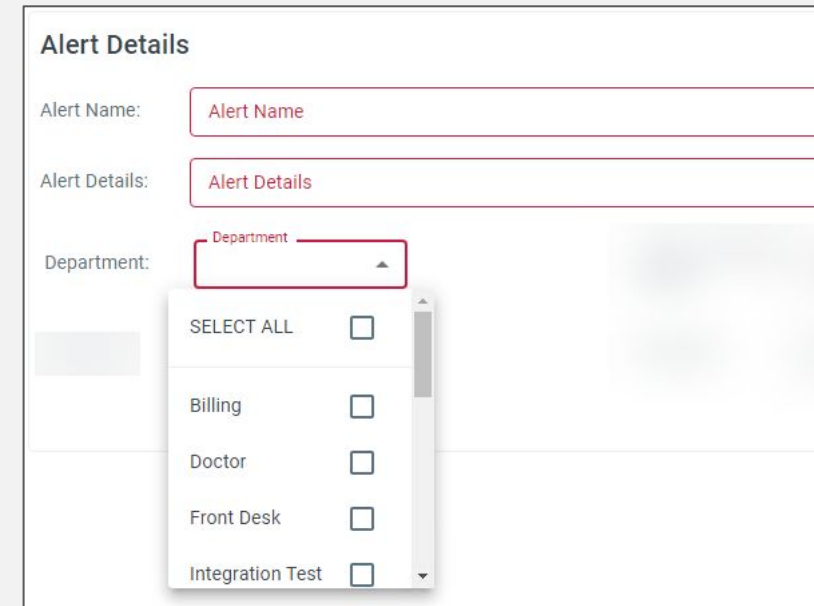
- Required field
- Holds up to 40 characters

## Alert Description

- Required field
- This is what displays to the users
- Holds up to 250 characters

## Department

- Required
- Multi-select option
- Drives what staff members see the alert



**Alert Details**

Alert Name:

Alert Details:

Department:

- SELECT ALL
- Billing
- Doctor
- Front Desk
- Integration Test

# Alert Criteria



## Start Date

- Required
- Defaults to today

## End Date

- Optional
- Makes alert inactive

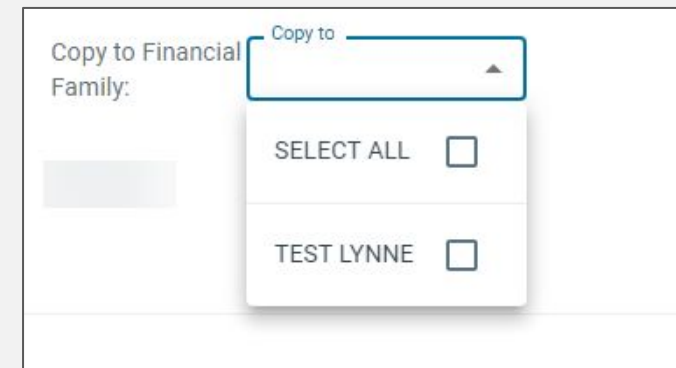
Start Date:	<input type="text" value="02/02/2024"/>	End Date:	<input type="text" value="End Date"/>
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# Alert Criteria

## Copy to Financial Family (Optional field)

- Only displays when patient has financial family
- Multi-select option
- Contains all siblings with the same financial guarantor
- Copying an alert only available when creating an alert
- No linkage - once copied to sibling it becomes an independent alert



The screenshot shows a user interface element for copying an alert to a financial family. It features a dropdown menu with the text 'Copy to' above it. Below the dropdown, there are two options: 'SELECT ALL' and 'TEST LYNNE', each with an unchecked checkbox to its right. The label 'Copy to Financial Family:' is positioned to the left of the dropdown.

# Alert Criteria

## Present Alert When

- Required
- Specifies where in the workflow the user will see the alert
- Multi-select

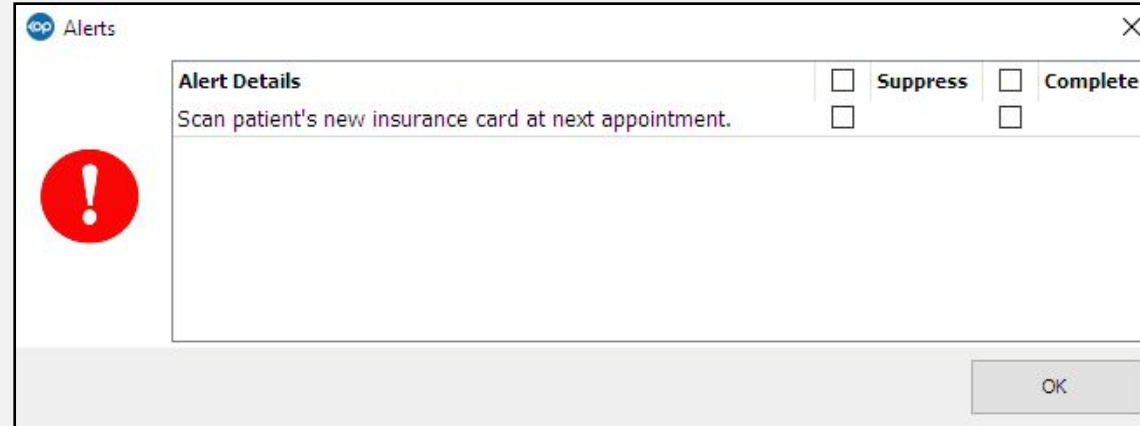
### Present Alert When:

- |   |  |
|---|--|
| <input type="checkbox"/> All                  | <input type="checkbox"/> Opening Account Summary |
| <input type="checkbox"/> Chart is Opened      | <input type="checkbox"/> Opening an Encounter    |
| <input type="checkbox"/> Checking in an Appt. | <input type="checkbox"/> Opening Family Contacts |
| <input type="checkbox"/> Creating a Message   | <input type="checkbox"/> Opening Insurance       |
| <input type="checkbox"/> Scheduling an Appt.  | <input type="checkbox"/> Opening a Well Visit    |

# In Workflow Notification

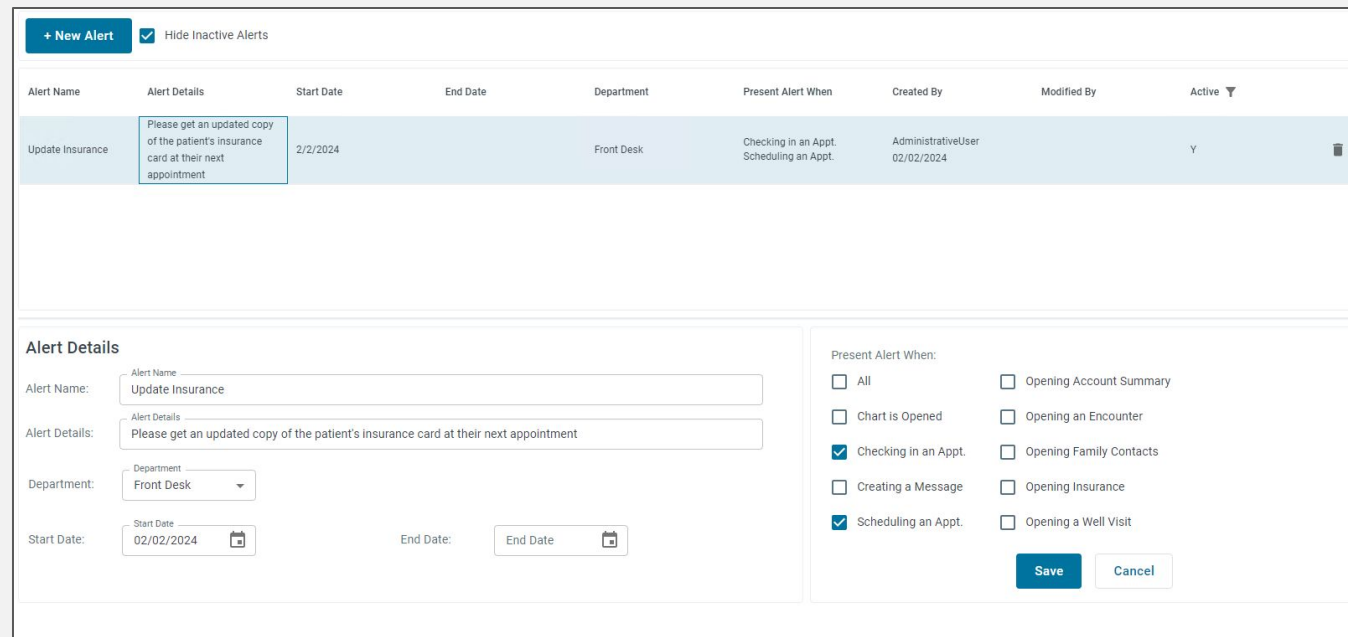
After an alert is created for a patient, when you perform the action that was specified in the **Present Alert When** section, a pop-up will appear on the screen.

**Note:** Pop-up will contain all alerts set to appear upon that action



# Modifying a Patient Alert

- Requires Alerts\_Modify permission
- Select an alert from grid
- Make changes
- Click Save



The screenshot displays the 'Alerts' management interface. At the top, there is a '+ New Alert' button and a checked 'Hide Inactive Alerts' checkbox. Below this is a table with columns: Alert Name, Alert Details, Start Date, End Date, Department, Present Alert When, Created By, Modified By, and Active. A single alert is listed: 'Update Insurance' with details 'Please get an updated copy of the patient's insurance card at their next appointment', start date '2/2/2024', department 'Front Desk', and 'Present Alert When' set to 'Checking in an Appt. Scheduling an Appt.'. Below the table is the 'Alert Details' form, which includes fields for Alert Name, Alert Details, Department (a dropdown menu), Start Date, and End Date. To the right of the form is a 'Present Alert When' section with a list of checkboxes: All, Chart is Opened, Checking in an Appt., Creating a Message, Scheduling an Appt., Opening Account Summary, Opening an Encounter, Opening Family Contacts, Opening Insurance, and Opening a Well Visit. The 'Checking in an Appt.' and 'Scheduling an Appt.' checkboxes are checked. At the bottom right of the form are 'Save' and 'Cancel' buttons.

Alert Name	Alert Details	Start Date	End Date	Department	Present Alert When	Created By	Modified By	Active
Update Insurance	Please get an updated copy of the patient's insurance card at their next appointment	2/2/2024		Front Desk	Checking in an Appt. Scheduling an Appt.	AdministrativeUser 02/02/2024		Y

**Alert Details**

Alert Name: Update Insurance

Alert Details: Please get an updated copy of the patient's insurance card at their next appointment

Department: Front Desk

Start Date: 02/02/2024

End Date: End Date

**Present Alert When:**

- All
- Chart is Opened
- Checking in an Appt.
- Creating a Message
- Scheduling an Appt.
- Opening Account Summary
- Opening an Encounter
- Opening Family Contacts
- Opening Insurance
- Opening a Well Visit

Save Cancel



Q&A

# Help Center Resources



- [Patient Alerts Overview and Permissions](#)
- [Alert Criteria](#)
- [Create, Modify and Delete Alerts](#)
- [In Workflow Notifications for Alerts](#)
- [Audit Log Tracking for Alerts](#)