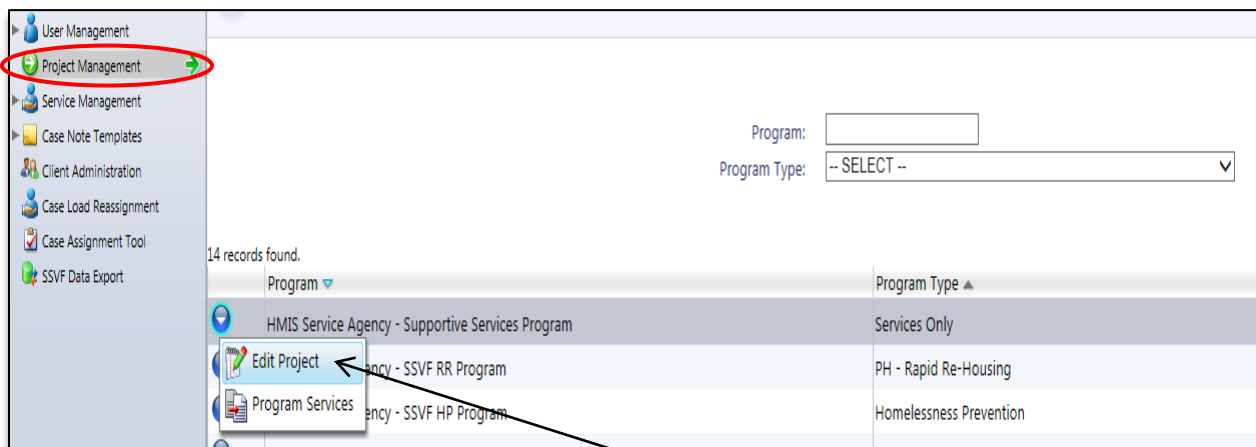


## Case Manager Alerts Guide

To assist Organizations and Case Managers better manage their programs the system has been updated to include 4 new notification features that can assist in monitoring of their client's data quality. The new features relate to Project Capacity, Annual Assessments, Service Inactivity and Extended Enrollments, all of which can be enabled and configured to best meet the needs of individual projects.

*Please note that these alert and notification functions are located and configured within each Project Profile and are only accessible by managerial level staff.*

These new alert features are located in each project's profile, which contains all project based configurations, and can be located under the Home -> Agency Manager Functions (or Assistant Manager Functions) -> Project Management area. Within the Project Management area the system will list all of the projects setup under your organization.



By using the project record action menu (blue ball) select the **Edit Project** option to load the profile screen and access these functions.

### Project Capacity Alert:

The Project Capacity allows for the recording of a maximum amount of clients that your project can serve at any single point in time and refers to the overall number of active enrollments that can be entered into the HMIS system. This is an extremely useful setting to assist organizations in keeping their HMIS project enrollments accurate and to stay on top of exiting or discharging persons when their project stay has been completed.

*This option is highly recommended for residential projects, especially those that have a set number of beds that can be occupied any one night.*

To activate this feature enter in your capacity number into the **Project Capacity** field and select the **Capacity Notification**, which includes “Warn and Limit” and “Warn Only” settings.

**Project Capacity** - Enter the capacity of the project into the field below, which is the total number of persons that can be served or enrolled at a single time. Select the Capacity Notification Type will display a message once capacity is reached and not allow any additional enrollments, while the "Warn Only" setting will display the capacity message but continue to allow additional enrollments.

Project Capacity:

Capacity Notification:\*

When you perform new enrollments into this project the system will check this setting and determine if your current capacity has been met. For “*Warn and Limit*” the system will notify the user that the capacity level has been met and will not allow any new enrollments, for “*Warn Only*” the system will provide the notification but will still allow continued enrollments.

### Annual Assessment Alert:

The Annual Assessment alert allows for Case Managers to receive automatic alerts on their currently enrolled clients that have missing or past due annual assessments. Since most HUD funded projects are required to perform annual assessments on all clients that are not yet exited but have been enrolled for longer than 12 months this is a great option to use as a reminder.

To activate this feature simply check the **Annual Assessment Auto-Alert** option. When activated the system will periodically perform annual assessment checks and Case Managers will receive alerts for any client enrolled in a program longer than 12 months without an annual assessment.

**Annual Assessment Auto-Alert** - this option when selected will send out automatic alerts to Case Managers about their enrolled clients that are missing or are due.

Annual Assessment Auto-Alert:


In PA HMIS, all annual assessments are also called “*During Enrollment Assessments*” and consist of assessment data collected after the project enrollment while the client is still enrolled. The system always uses the clients most recent or latest during enrollment assessment during the specific reporting period as their annual assessment for reporting purposes.

### Service Inactivity Alert:

The Service Inactivity alert allows for Case Managers to receive automatic alerts on their currently enrolled clients that have had no active services in the timeframe denoted. This alert will most benefit those projects that continually enter in services as part of program participation and this option can provide notification when that service participation is no longer active or on-going. This can be used to assist in continuing service data entry or to identify clients that need to be exited or discharged.

To activate this feature enter the number of days into the **Service Auto-Alert Days** field. When activated the system will periodically perform service inactivity checks and Case Managers will receive alerts for any client enrolled in a program that have service inactivity (no active services) for the denoted timeframe.

**Service Inactivity Auto-Alert** - this option allows for the creation of automatic alerts sent to Case Managers to signify periods of service inactivity for enrolled clients. To activate this alert service within this timeframe an alert will be sent by the system.


Service Auto-Alert Days:  

### Extended Enrollment Alert:

The Extended Enrollment alert allows for Case Managers to receive automatic alerts on their currently enrolled clients that have been enrolled past the timeframe denoted. This alert can be used to assist in identifying clients that have been enrolled in a program long past the normal timeframe for the average program participant. We recommend using a timeframe in which most of your clients should have been exited or discharged from the program.


To activate this feature enter the number of days into the **Extended Enrollment Auto-Alert Days** field. When activated the system will periodically perform extended enrollment checks and Case Managers will receive alerts for any client still enrolled in a program after the extended enrollment time frame.

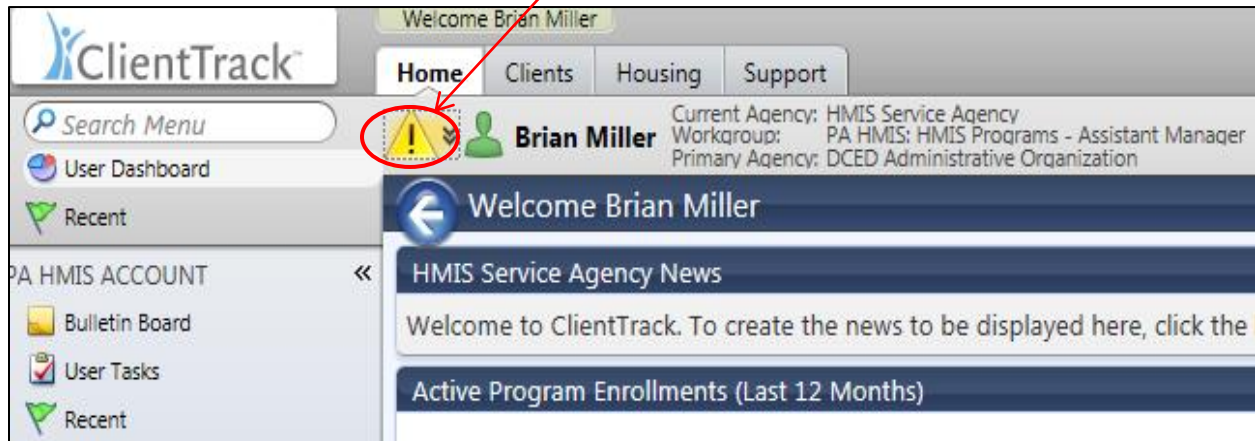
**Extended Enrollment Auto-Alert** - this option allows for the creation of automatic alerts sent to Case Managers to signify a longer than normal enrollment length. To activate this alert this program for longer than the entered timeframe an alert will be sent by the system.


Extended Enrollment Auto-Alert Days:  

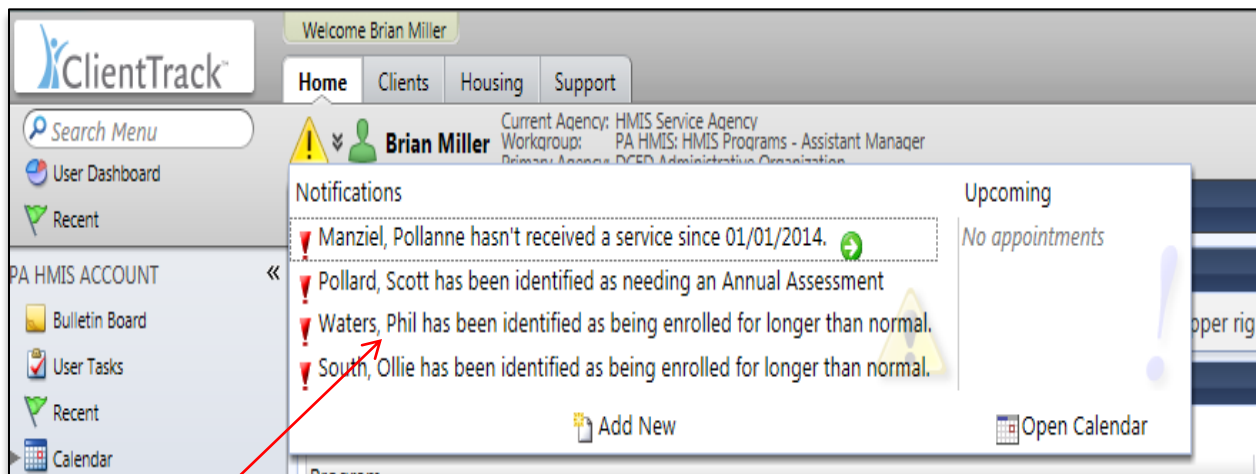
*Please note that while the system will use the enrollment date during initial checks, for additional notifications the system will use the date of the most recent alert.*

## Case Manager Notifications:

Case Manager Alerts will be broadcast to each user on their **Home** tab, within the notification area directly to left of your name, denoted by this symbol . When this notification symbol is yellow or red that indicates you have pending or available notifications, sent either through other users or through these automatic system alerts.



To view these alerts simply click on the notification symbol  and the system will display, in summary form, all of your current alert messages. Each of the three auto-alerts when sent will display the client's name and a short message indicating the reason for the alert.



These alert messages will remain available within your notification area until you access them and change their status. To access an alert, select or click the alert within this summary screen.

The alert message will load in a new window and will provide additional details on the notification and the message, priority and dates can all be altered as warranted. To remove

the alert from your notification area you will need to change the **Status** of the alert to either “Complete” or “Cancelled”. Once that status is saved the alert will be permanently retired.

**Notification / Alert**

Enter the appropriate information below for the notification / alert.  
**Please Note:** The Priority option will determine how the notification icon is displayed when the client is accessed.

High (Red)  
Normal (Yellow)  
Low (Green)

Message: \* Waters, Phil has been identified as being €

Notification Type: \*  
 Violence  
 No Contact  
 Information  
 System Alert

Priority: \* Medium

Begin Date: \* 04/28/2015 AM

End Date: AM

Status: \* Complete

**Alert Setup** - Use the fields below to determine when to show the notification. If you check *Show Reminder*, the alert will open a popup window the specified length of time before the schedule begins.

Alert(s)

Please note that you also have access to set additional *Alerts* for this notification and the system can store reminders that can prompt you for further action at later times. This functionality works much like reminders in standard Outlook or Google calendars.