Navigating Alerts

Knowledge Base Article

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Ohio | Department of Job and Family Services

Last updated 05/25/2017

Overview

This article describes how to navigate the new **Activity Stream** functionality, specific to **Alerts**. **Alerts** serve the user in the following manner:

- Alerts notify the user of events that have taken place on the workload.
- SACWIS displays the date the **Alert** was created and the name of the worker who completed the trigger action.
- Alerts display based on your assignment and role.
- The Alert message is a hyperlink to the relevant work item that was completed. Alerts include hyperlinks to the applicable Case, Person, or Provider.

Note: Many of the Alerts are derived from existing SACWIS generated email notifications. Email notifications will continue, and will be supplemented rather than replaced by the new Alerts.

Managing Home Page Alerts

Caseworker and Supervisor View

After logging into SACWIS, the system defaults to the Home page. The Home page contains:

- **Headers (Home, Intake, Case, provider, Financial, Administration);**
- **Tabs (Alerts, Action Items, Approvals, Assignments) listed below the Headers;**
- **Broadcast Messages; and,**
- **Alerts listed below the Broadcast Messages**.

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Alerts display by clicking one of the following:

1. Select **Last login**. This is the default view on the Home page. Alerts generated since your last login will display. You may select to expand the timeframe to display more Alerts.
2. Select **1 day**. This view displays Alerts generated within the past day.
3. Select **7 days**. This view displays Alerts generated within the last seven days.
4. Select **14 days**. This view displays Alerts generated within the last fourteen days.

> **NOTE**: Alerts on the Home page will not be displayed beyond fourteen days.

The date displayed is the date the Alert was created. Each Alert is created based on a specific work item or piece of information being entered in SACWIS.

The Alert message is a hyperlink to a completed work item. Each Alert also displays the Case Name/ID, Person Name/ID and/or Provider Name/ID relevant to the Alert. Each of these identifiers is a hyperlink to the Case/Provider/Person.

The name of the worker who completed the Work Item which generated the Alert displays below the hyperlink.

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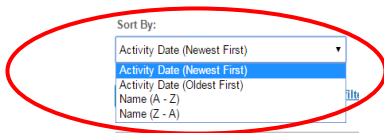
Sorting and Filtering Alerts

Alerts will be arranged according to the option chosen from the **Sort By** drop-down menu.

1. Click the drop-down box beside **Sort By**. A list of options displays.
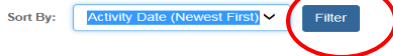
2. Click one of the following **Sort By** options:
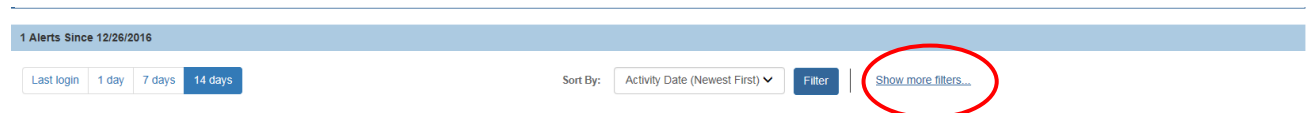   - Activity Date (Newest First),
   - Activity Date (Oldest First),
   - Name (A-Z), or
   - Name (Z-A).

3. Click the **Filter** button.

4. Click **Show More Filters** to filter with more specificity.

Caseworker View

Below is the Show More Filters expanded list, as seen by Caseworkers.

Select the **Show Work Completed on My Assignments by** filter by clicking on one of the following:

1. Select **Myself and other workers**. This displays Alerts for which the trigger action was completed by the logged in user, and those for which the trigger action was completed by another user. This is the default.

2. Select **Just myself**. This displays Alerts for which the trigger action was completed by the logged in user.

3. Select **Just other workers**. This displays Alerts for which the trigger action was completed by another user.

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Supervisor View

Below is the expanded Show More Filters list, as seen by Supervisors.

Alert View displays by clicking one of the following:

1. Select **All**. This displays all non-duplicated Alerts based on Supervisory Role and My Assignments, as defined below.

2. Select **Supervisory Role**. This is the default value upon login, which displays only those Alerts which have been identified as important enough to warrant an Alert to the Supervisor. This includes Supervisory Alerts for work items to which the Supervisor's subordinates are assigned, as well as work items to which the logged in user is directly assigned with a Supervisor role.

Note: From the Home page, the Supervisor does not see every Alert generated for each work item, such as a Case. However, **all** Alerts can be found in the Case Overview or Provider Overview.

3. Select **My Assignments**. This displays Alerts based on the logged in user's direct workload assignments and role.

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Note: Within the Show More Filters option, a Caseworker or Supervisor has the option to also select a **Category**, in addition to one of the radio buttons, for more specificity.

Once all filter and sort selections have been made, click the **Filter** button

Any Alerts meeting the selected Filter parameters will display.

4. Click **Reset** to return to the default Sort and Filter settings.

5. Click **Show fewer filters** to minimize the filter display.

Note: When the filters are minimized, gray boxes labeled **Assignment** and/or **Category** display below the **Last Login** button if either of these filters has been applied. Clicking on these gray boxes will remove the **Filter** option(s).

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Managing Case Overview Alerts

Alerts also display on the Case Overview and can be viewed here by any user with access to the Case, regardless of assignment or role.

1. Click the **Case** tab on the **Home** page.
2. Click **Workload.**

The **Case Workload** screen appears.

3. Click the plus sign beside the case work to view a list of his or her cases.
4. Select a case from the **Case Workload.**
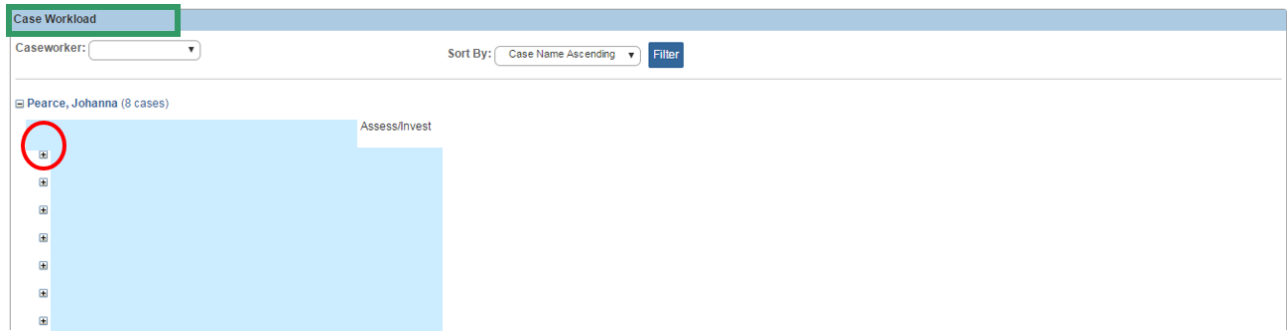
The **Case Overview** screen appears.

The **Case Alerts** tab is located in the middle of the bar between the **Action Items** and **Assignments/Eligibility** tabs). The Alerts are located on the lower portion of the Case Overview.

Click one of the following display option buttons to display Alerts:

1. **7 days**: This is the Case Overview default, displaying Alerts generated within the last seven days.
2. **14 days**: Alerts generated within the past fourteen days will display.
3. **30 days**: Alerts generated within the past 30 days will display.
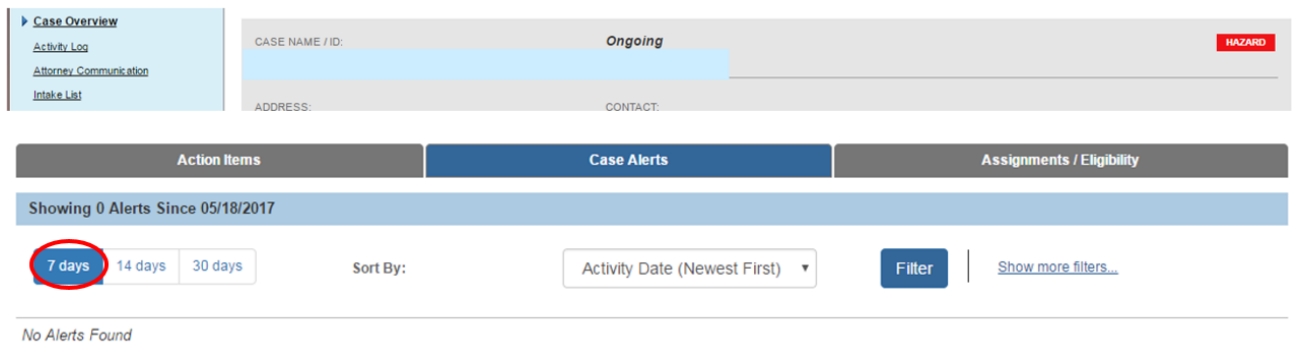
Note: Alerts on the Case Overview include all Alerts that have been generated for the case and all Alerts pertaining to Active Case Members.

Navigating Alerts

Filtering Alerts from the Case Overview functions in the following way:

1. Select one of the following from the **Sort By** drop-down box:
   - Activity Date (Newest First), or
   - Activity Date (Oldest First).

2. Click **Show More Filters.**

3. Enter a **From Date** and **To Date** in the **Specify Date Range** fields.

Note: This custom date range filter allows you to view Alerts for the Case which are more than 30 days old.

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4. Select **Sort By** to list Alerts newest or oldest first.

5. Click the **Filter** button.

Any Alerts meeting the specific filter parameters will display.

Below the buttons for **7 days/14 days/30 days**, a **Custom Date Range** gray box appears if this filter has been applied. You may remove the date filter option by clicking on the gray box.

If you need additional information or assistance, please contact the SACWIS Help Desk.