

Navigating Alerts



Knowledge Base Article

Navigating Alerts

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Navigating Alerts

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.**

The screenshot displays the SACWIS Home page interface. At the top, there is a horizontal navigation bar with tabs: Home, Intake, Case, Provider, Financial, and Administration. Below this, a secondary set of tabs includes Alerts, Action Items, Approvals, and Assignments. The Alerts tab is currently selected. The main content area is divided into three sections: BROADCAST MESSAGES, QUENTON COUNTY JOB & FAMILY SERVICES - CHILDREN SERVICES DIVISION MESSAGES, and ODJFS MESSAGES. Each section contains a list of messages with timestamps and subject lines. The first two sections have a red border, while the third has a blue border. At the bottom, there are two buttons: 'Add Message' and 'Manage Messages ...'.

Home	Intake	Case	Provider	Financial	Administration
Alerts	Action Items	Approvals	Assignments		

BROADCAST MESSAGES
04/09/2016 9:28 AM This is a very important subject line, perhaps consider about 75 char long
This is one urgent broadcast message. Pulvinar tempor. Magnis sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Magnis sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.
04/09/2016 9:28 AM This is a very important subject line, perhaps consider about 75 char long
This is one urgent broadcast message. Pulvinar tempor. Magnis sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.

QUENTON COUNTY JOB & FAMILY SERVICES - CHILDREN SERVICES DIVISION MESSAGES
04/14/2016 8:30 AM This is a very important subject line, perhaps consider about 75 char long... [Show more](#)

ODJFS MESSAGES
04/09/2016 9:28 AM This is a very important subject line, perhaps consider about 75 char long... [Show more](#)
04/04/2016 1:15 PM This is a very important subject line, perhaps consider about 75 char long... [Show more](#)

[Add Message](#) [Manage Messages ...](#)

Navigating Alerts

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.

0 Alerts Since 01/06/2017 01:33 PM

Last login 1 day 7 days 14 days

Sort By: Activity Date (Newest First) [Show more filters...](#)

No Alerts Found.

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.

36 Alerts Since < Date/Time >

Last login 1 day 7 days **14 days**

Sort By: Activity Date (Newest First) [Show more filters...](#)

Result(s) 1 to 15 of Y / Page 1 of Z

04/14/2016	<ChildFirstname> <Lastname> <Suffix> / <0000000> is in a Living Arrangement	Case Name/ID: Lastname, Firstname F / 0000000 Completed by: Driver, Elle
04/11/2016	Activity Log created/updated by non-assigned worker	Case Name/ID: Lastname, Firstname F / 0000000 Completed by: Winnfield, Jules
04/11/2016	<ChildFirstname> <Lastname> <Suffix> / <0000000> is on leave	Provider Name/ID: Lastname, Firstname F / 0000000 Completed by: Driver, Elle

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Sorting and Filtering Alerts

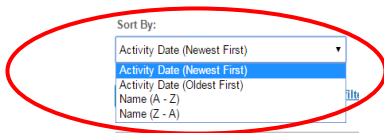
Alerts will be arranged according to the option chosen from the **Sort By** drop-down menu.

1. Click the drop-down box beside **Sort By**. A list of options displays.

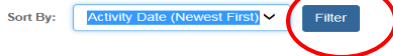


2. Click one of the following **Sort By** options:

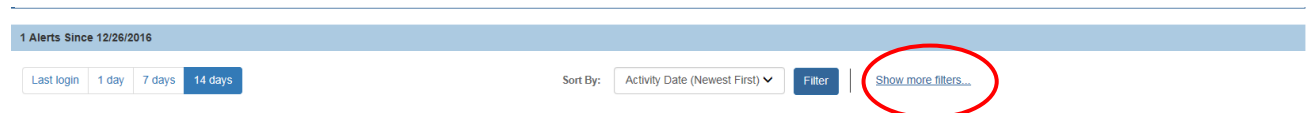
- Activity Date (Newest First),
- Activity Date (Oldest First),
- Name (A-Z), or
- Name (Z-A).



3. Click the **Filter** button.



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



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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.

1 Alerts Since 12/26/2016

Last login 1 day 7 days 14 days

Show work completed on my assignments by:

☒ Myself and other workers

☐ Just myself

☐ Just other workers

Category:

All

Sort By:

Activity Date (Newest First)

Filter Reset Show fewer filters

Navigating Alerts

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.

0 Alerts Since 01/09/2017 02:21 PM

Last login 1 day 7 days 14 days

Alert view:

☒ All

☐ Supervisory Role

☐ My Assignments

Category:

All

Sort By:

Activity Date (Newest First)

Filter Reset Show fewer filters

1

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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.

0 Alerts Since 02/07/2017 08:02 AM

Last login 1 day 7 days 14 days

Alert view:

☒ All

☐ Supervisory Role

☐ My Assignments

Category:

- All
- Administration
- Assessment / Investigation
- Court
- Financial
- Ongoing / Adoption
- Provider

Filter Reset Show fewer filters

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

22 Alerts Since 01/17/2017

Last login 1 day 7 days 14 days

Alert view:

☐ All

☒ Supervisory Role

☐ My Assignments

Category:

Assessment / Investigation

Sort By:

Activity Date (Newest First)

Filter Reset Show fewer filters

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).

2 Alerts Since 01/17/2017

Last login 1 day 7 days 14 days

Sort By: Activity Date (Newest First) Filter Show more filters

Assignment Category

Result(s) 1 to 2 of 2 / Page 1 of 1

01/25/2017	Safety Plan Discontinued	Case Name / ID: [redacted]
		Completed by: [redacted]
01/25/2017	Safety Plan Effective	Case Name / ID: [redacted]
		Completed by: [redacted]

Navigating Alerts

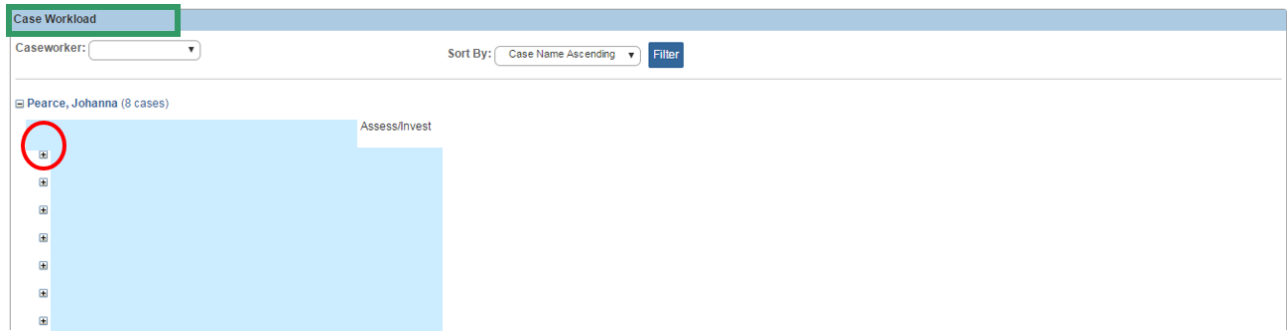
Managing Case Overview Alerts

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**.

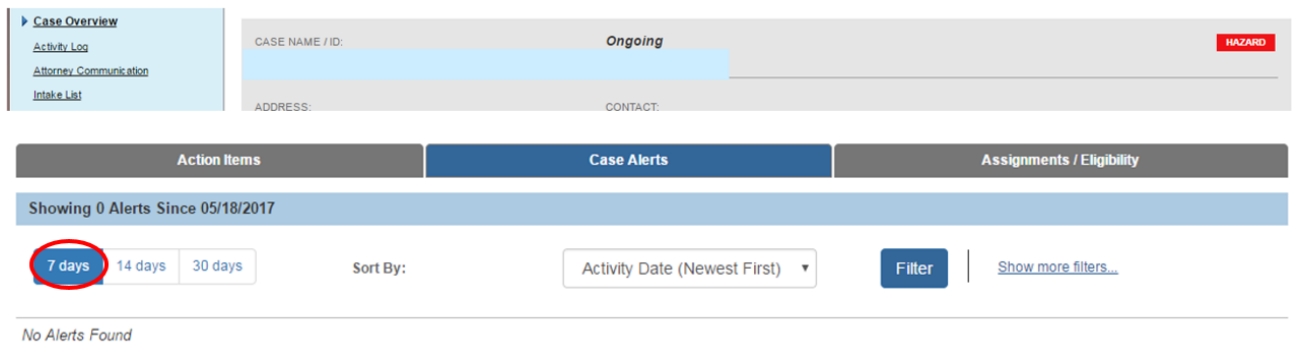


The **Case Overview** screen appears.

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).

This screenshot shows the 'Case Alerts' tab selected. Below the header, it says 'Showing 0 Alerts Since 01/25/2017'. There are three buttons for time ranges: '7 days', '14 days', and '30 days'. To the right, the 'Sort By:' label is followed by a dropdown menu currently set to 'Activity Date (Newest First)'. This dropdown and the 'Filter' button are circled in red. A 'Show more filters...' link is also visible. At the bottom, it says 'No Alerts Found'.

2. Click **Show More Filters**.

This screenshot is similar to the previous one, but the 'Show more filters...' link is circled in red. The 'Filter' button is also visible. The 'No Alerts Found' message is at the bottom.

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



This screenshot shows the 'Specify date range:' section. It has two input fields: 'From Date' with the value '01/01/2017' and 'To Date' with the value '01/25/2017'. Each field has a calendar icon to its right. This entire section is circled in red. Below this, there is a 'Sort By:' dropdown set to 'Activity Date (Newest First)'. At the bottom, there are 'Filter' and 'Reset' buttons, and a 'Show fewer filters' link. The 'No Alerts Found' message is at the very bottom.

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

Navigating Alerts

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

Showing 0 Alerts Since 01/25/2017

Specify date range:  
From Date To Date



Sort By: Activity Date (Newest First) ▼

| [Show fewer filters](#)

No Alerts Found

5. Click the **Filter** button.

Showing 0 Alerts Since 01/25/2017


Specify date range:  
From Date To Date

Sort By: Activity Date (Newest First) ▼

| [Show fewer filters](#)

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.

Action Items	Case Alerts	Assignments / Eligibility			
Showing 0 Alerts from 01/01/2017 to 01/25/2017					
<div>7 days 14 days 30 days</div> <div>Sort By: Activity Date (Newest First) ▼ <input type="button" value="Filter"/> Show more filters...</div> <div><div>Custom Date Range </div></div> <tr><td colspan="3">No Alerts Found</td></tr>			No Alerts Found		
No Alerts Found					

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