

# **Navigating Alerts**



**Knowledge Base Article**

# Navigating Alerts

## Table of Contents

Overview .....	3
Managing Home Page Alerts .....	3
Caseworker and Supervisor View .....	3
Sorting and Filtering Alerts .....	5
Caseworker View.....	6
Supervisor View .....	7
Managing Case Overview Alerts .....	9

# 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.
- Ohio 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 Ohio 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 Ohio 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 shows the top navigation bar with tabs: Home, Intake, Case, Provider, Financial, and Administration. Below this is a secondary row of tabs: Alerts, Action Items, Approvals, and Assignments. The main content area displays three sections of broadcast messages:

- BROADCAST MESSAGES:** Two messages from 04/09/2016 9:28 AM. Each has a subject line: "This is a very important subject line, perhaps consider about 75 char long" and a body of placeholder text.
- QUENTON COUNTY JOB & FAMILY SERVICES - CHILDREN SERVICES DIVISION MESSAGES:** One message from 04/14/2016 8:30 AM with the same subject line and a "Show more" link.
- OOJFS MESSAGES:** Two messages from 04/09/2016 9:28 AM and 04/04/2016 1:15 PM, both with the same subject line and "Show more" links.

At the bottom of the message section are two buttons: "Add Message" and "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.

639 Alerts Since

Last login | 1 day | 7 days | 14 days

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

**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 Ohio 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) Filter | [Show more filters...](#)

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

04/14/2016	<a href="#">&lt;ChildFirstname&gt; &lt;Lastname&gt; &lt;Suffix&gt; / &lt;0000000&gt; is in a Living Arrangement</a>	Case Name/ID: <a href="#">Lastname, Firstname F / 0000000</a> Completed by: Driver, Elle
04/11/2016	<a href="#">Activity Log created/updated by non-assigned worker</a>	Case Name/ID: <a href="#">Lastname, Firstname F / 0000000</a> Completed by: Winfield, Jules
04/11/2016	<a href="#">&lt;ChildFirstname&gt; &lt;Lastname&gt; &lt;Suffix&gt; / &lt;0000000&gt; is on leave</a>	Provider Name/ID: <a href="#">Lastname, Firstname F / 0000000</a> Completed by: Driver, Elle

# Navigating Alerts

## 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.



## Navigating Alerts

### 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](#)

---

## Navigating Alerts

**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.

639 Alerts Since

Last login 1 day 7 days 14 days

Alert view:

All

Supervisory Role

My Assignments

Category:

All

Sort By:

Name (A-Z)

Filter Reset | [Show fewer filters](#)

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

639 Alerts Since

Last login 1 day 7 days 14 days

Alert view:

All

Supervisory Role

My Assignments

Category:

Assessment / Investigation

Sort By:

Name (A-Z)

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.



## Navigating Alerts

**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: Completed by:
01/25/2017	Safety Plan Effective	Case Name / ID: Completed by:

## 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**.

Home Intake Case Provider Financial Administration

Workload Court Calendar Placement Requests

Case Workload

Caseworker: Sort By: Case Name Ascending Filter

Test, Worker (24 cases)

- Test, Child [ 121212 ] - Open 06/17/2022 - Ongoing
- Sacwis, Susie [ 123456 ] - Open 11/21/2023 - Adoption

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.

# Navigating Alerts

The screenshot shows the 'Case Overview' page for a case named 'Adoption' with ID 'Sacwis, Susie / 123456'. The case is 'Open' as of 04/03/2024. The address is 123 Test Rd, Test, Oh 12345. The agency is 'Test County Children Services Board'. The primary worker is 'Test Worker' (Assign Worker) and the supervisor is 'Test Supervisor'. The 'Case Alerts' section shows 0 alerts since 06/04/2024. The 'Sort By' dropdown is set to 'Activity Date (Newest First)'. There are buttons for '7 days', '14 days', '30 days', and 'Filter'. A 'Show more filters...' link is also present. The status at the bottom is 'No Alerts Found'.

**Note:** Alerts on the **Case Overview** include all Alerts that have been generated for the case and all Alerts pertaining to Active Case Members.

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 close-up screenshot highlights the filtering options for Case Alerts. It shows the 'Case Alerts' tab selected in the navigation bar. Below the navigation bar, there are buttons for '7 days', '14 days', and '30 days'. The 'Sort By' dropdown menu is highlighted with a red box and is set to 'Activity Date (Newest First)'. There is also a 'Filter' button and a 'Show more filters...' link. The status at the bottom is 'No Alerts Found'.

# Navigating Alerts

## 2. Click **Show More Filters**.

**Case Actions**

[View Member Details](#) | [Access Original Case](#) | [Program Categories](#) | [Case Status History](#) | [View Adoption Subsidies](#)

Action Items | **Case Alerts** | Dashboard | Assignments / Eligibility

Showing 0 Alerts Since 06/04/2024

7 days | 14 days | 30 days | Sort By: Activity Date (Newest First) ▾



Filter | **Show more filters...**

---

No Alerts Found

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

Showing 0 Alerts Since 01/25/2017

Specify date range: 01/01/2017  01/25/2017   
From Date To Date

Sort By: Activity Date (Newest First) ▾

Filter | Reset | [Show fewer filters](#)

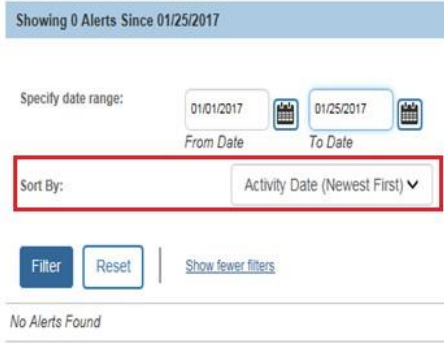
---

No Alerts Found

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

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

# Navigating Alerts



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 have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).