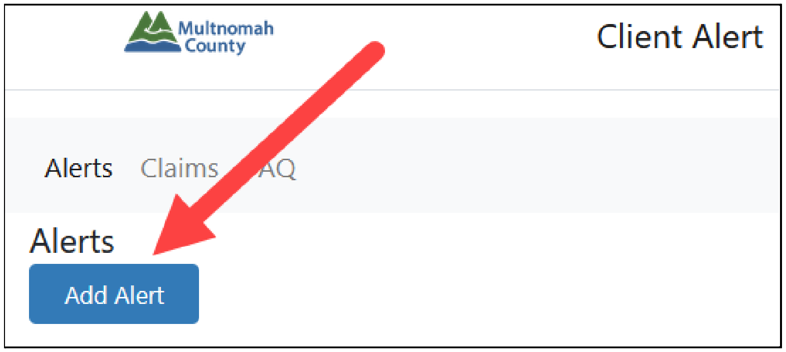
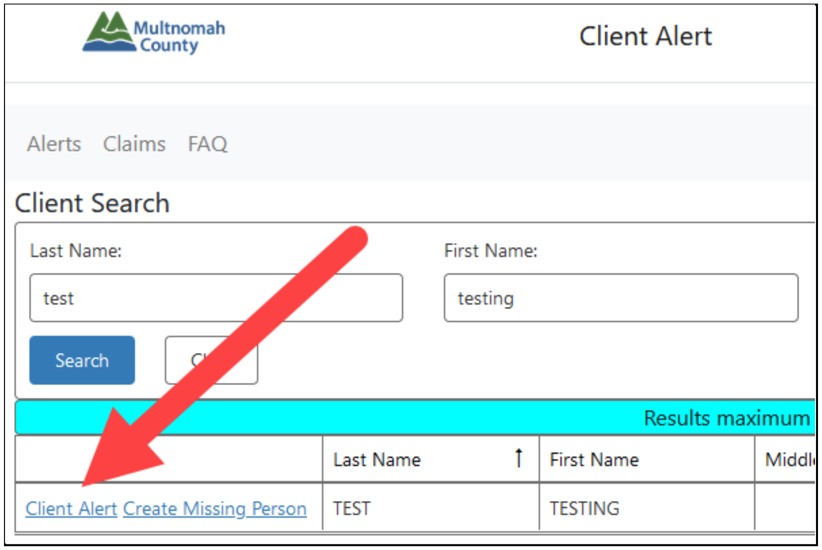
Creating a Client Alert:

1. Select "Add Alert"

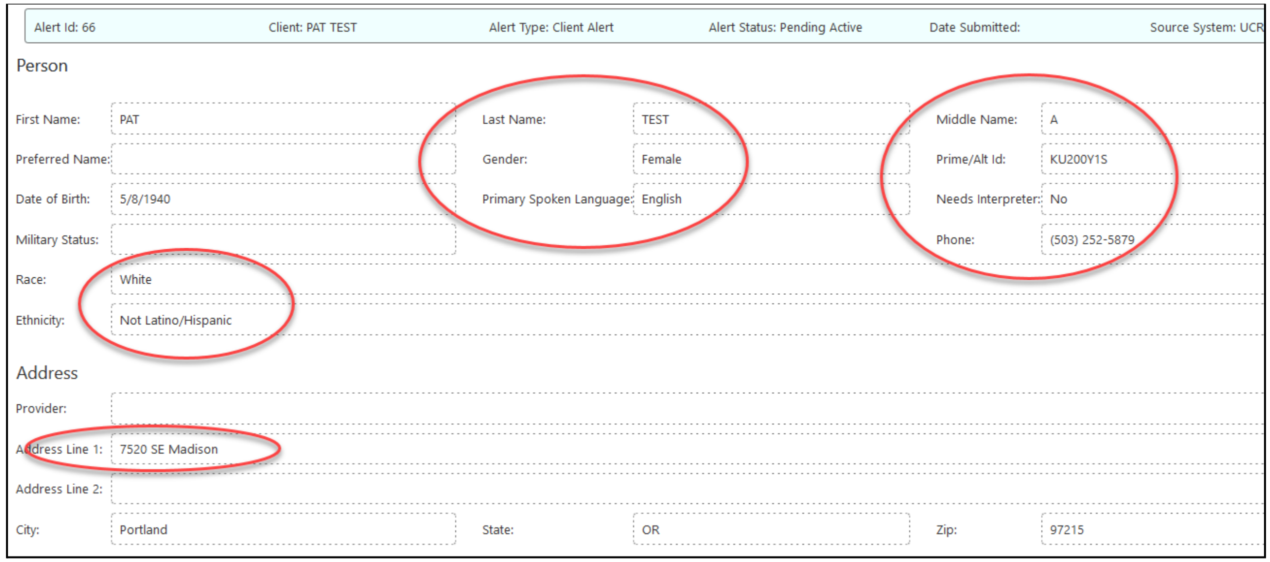


2. Search for the client (Note, if the name is common, you may need to add search terms to refine your search, a maximum of 100 results are returned). If your client is not in the system, add the client to the relevant source system, or if you do not have access, contact your direct supervisor.

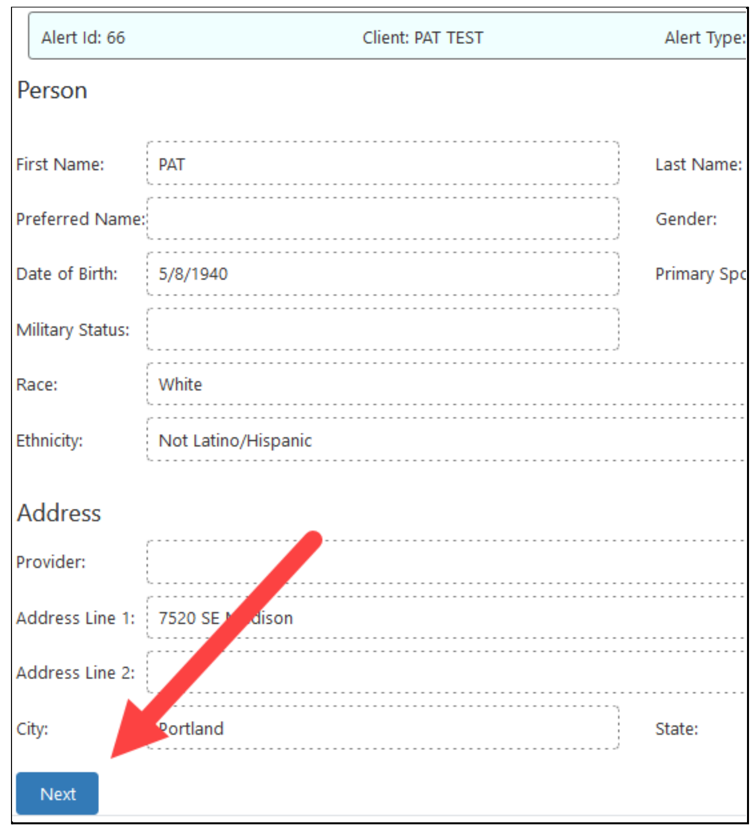
3. Once the client is identified, Select "Client Alert"



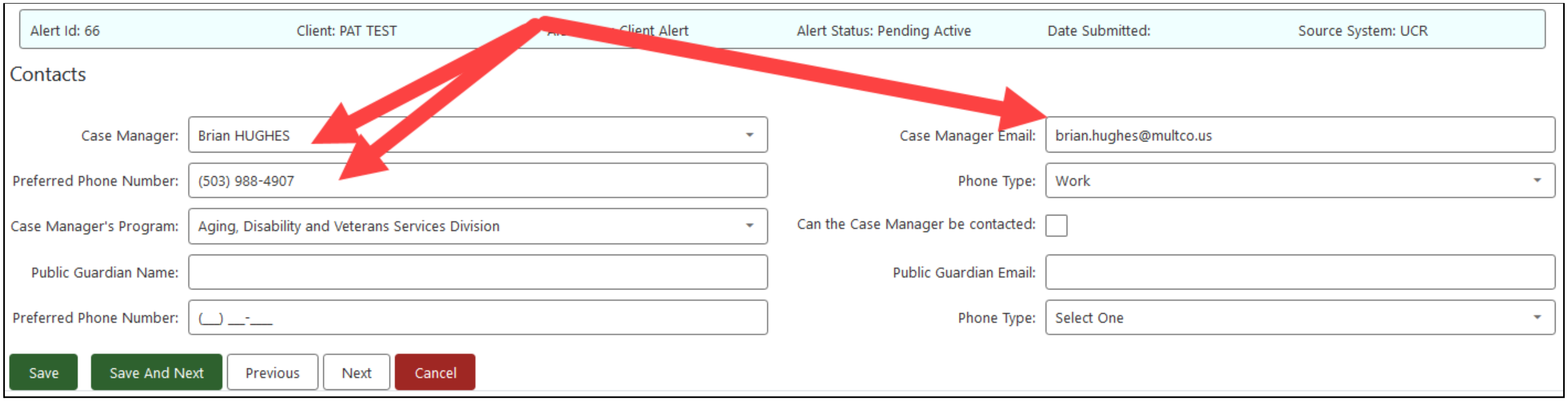
4. The information will automatically populate fields with information from the client database. Please verify that the demographic information is up to date. If information is incorrect, information needs to be updated in the database prior to entry of Client Alert (update manually or contact your direct supervisor).



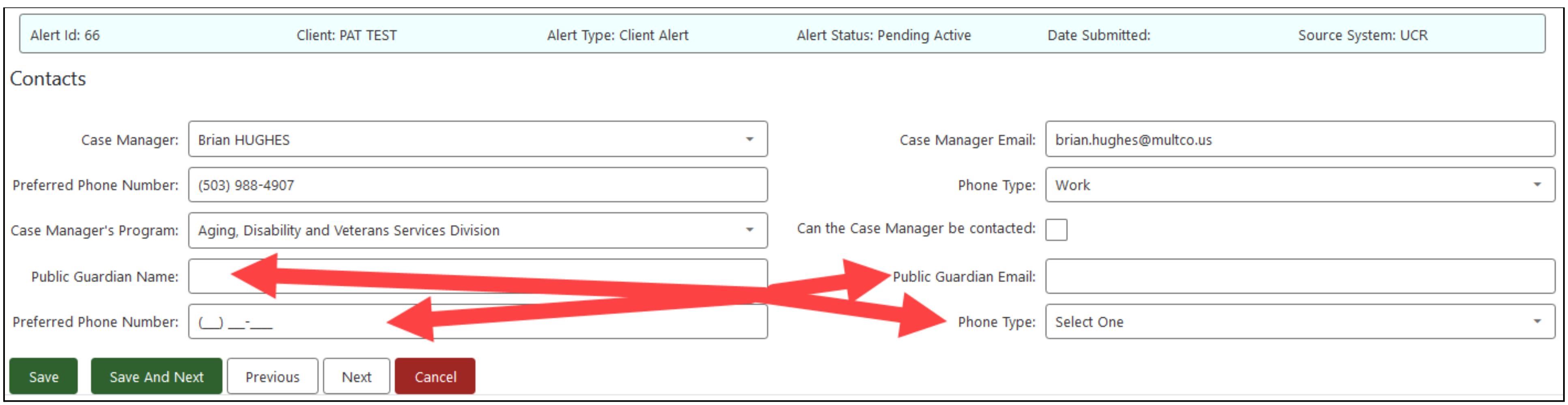
5. Once you've entered all known client demographic information, click "Next."



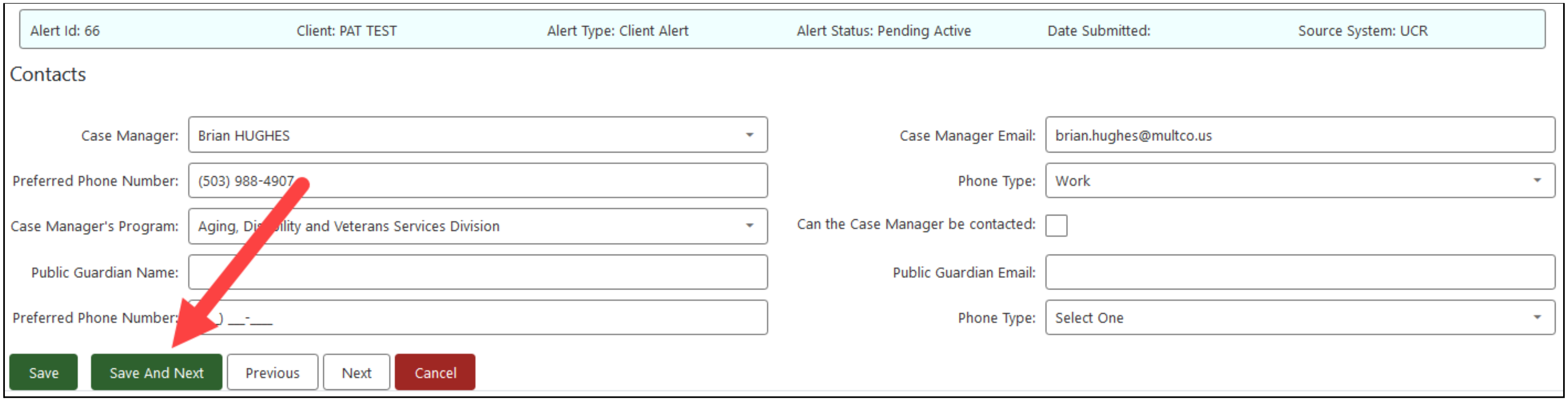
6. Select the Case Manager (CM) from the dropdown menu if known. The CM's phone, email and program will auto populate.



7. If a client has a known public guardian, add their information to the optional fields.

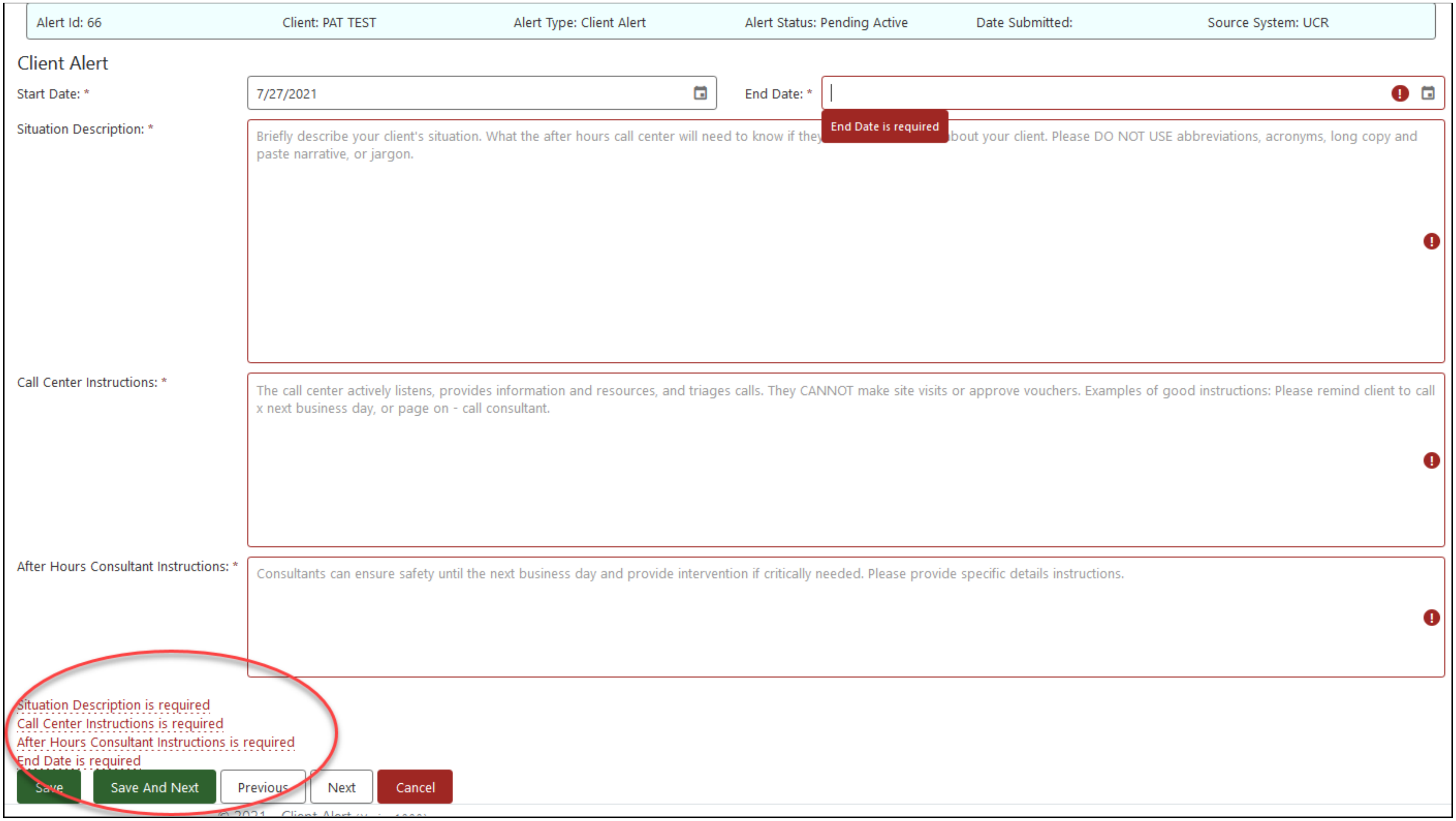


8. Click “**Save and Next**” to save your work and continue. **Note - data entered by the user will not be saved if the page is navigated away from, or a tab is changed, until the “Save” or “Save and Next” buttons are clicked.**



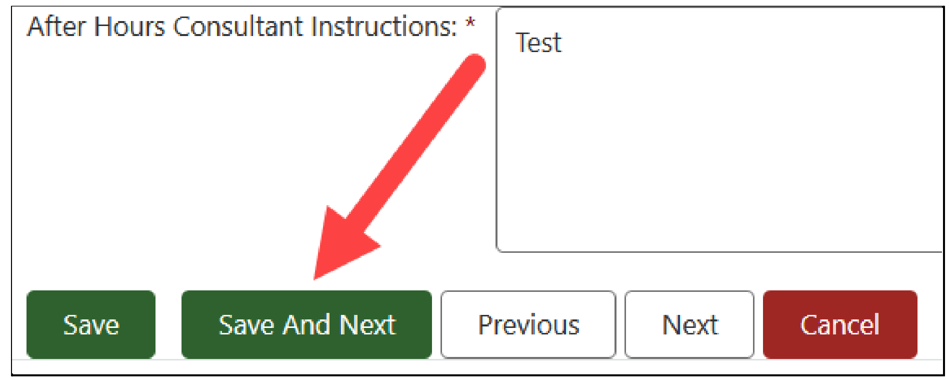
9. [FAQ for detailed instructions on filling out the narrative fields](#).

10. All fields on the “Client Alert” page are required before “Save” or “Save And Next” are selected. **Note - data entered by the user will not be saved if the page is navigated away from, or a tab is changed, until the “Save” or “Save and Next” buttons are clicked.**

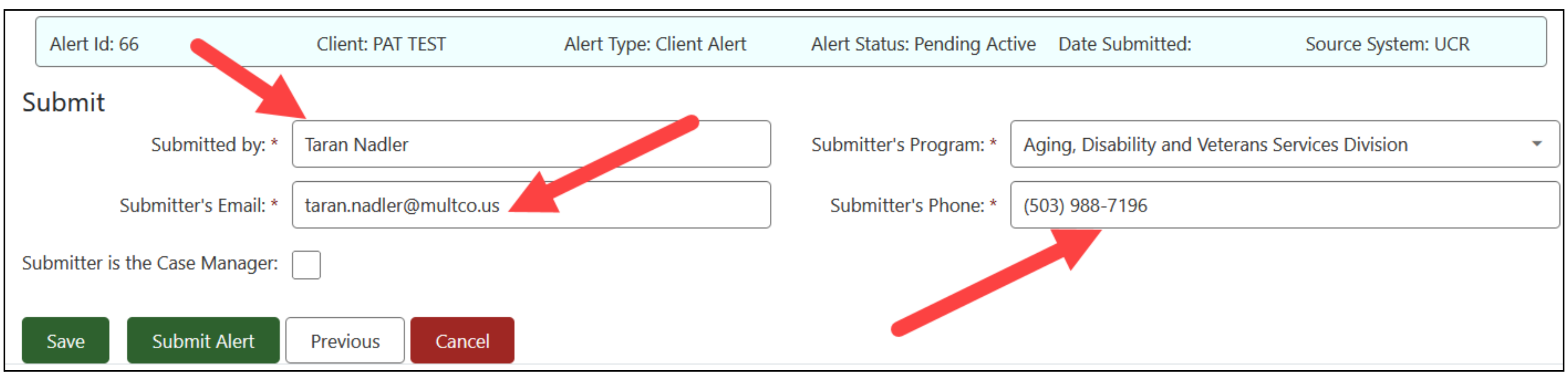


11. Note that the help text disappears once you begin typing in any field.

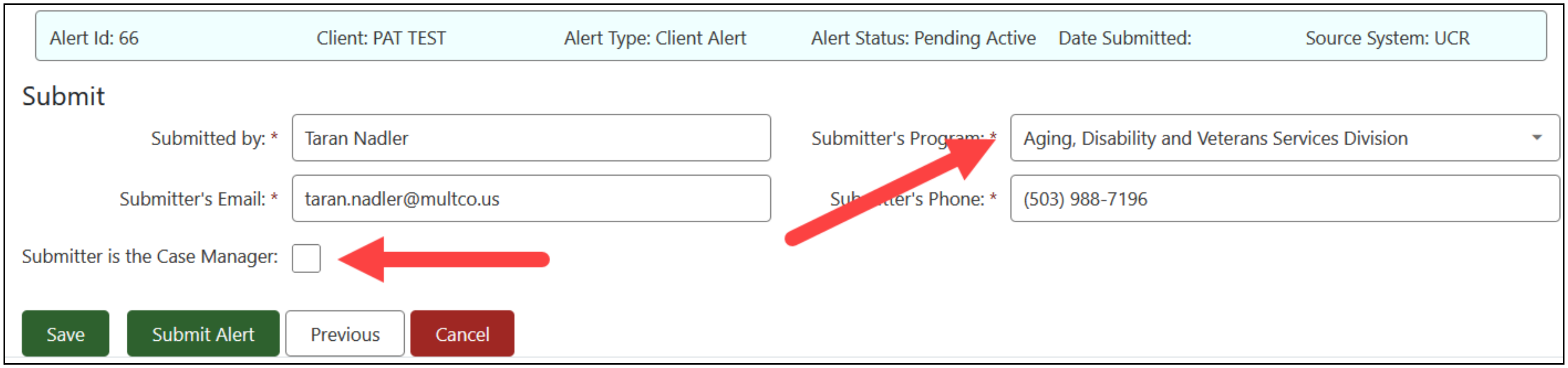
12. Click “Save And Next” to continue. **Note - data entered by the user will not be saved if the page is navigated away from, or a tab is changed, until the “Save” or “Save and Next” buttons are clicked.**

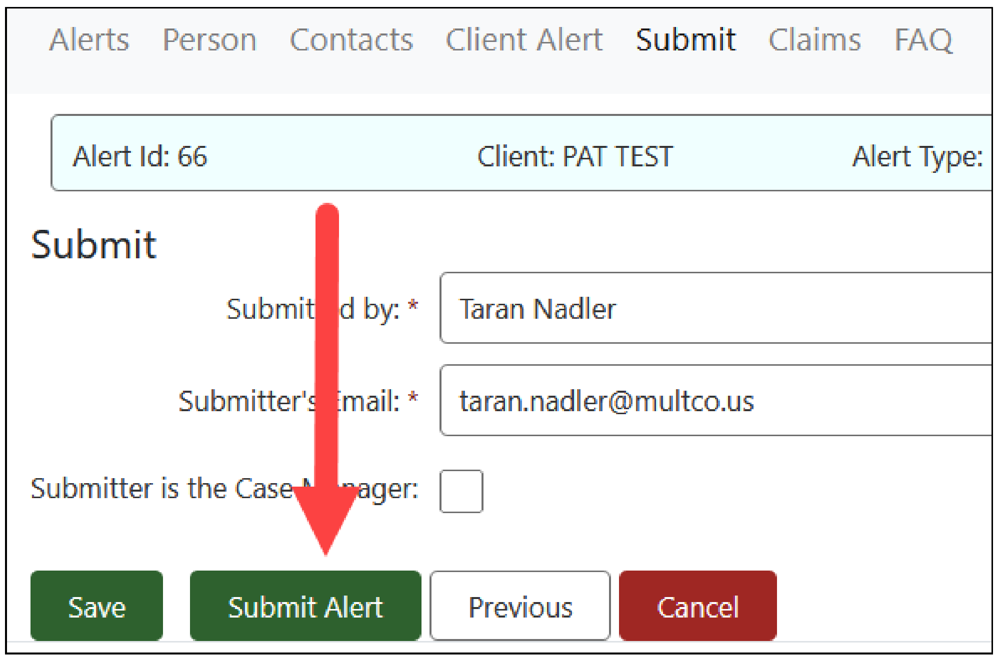


13. Check that submitter autopopulated information is accurate and edit if needed.

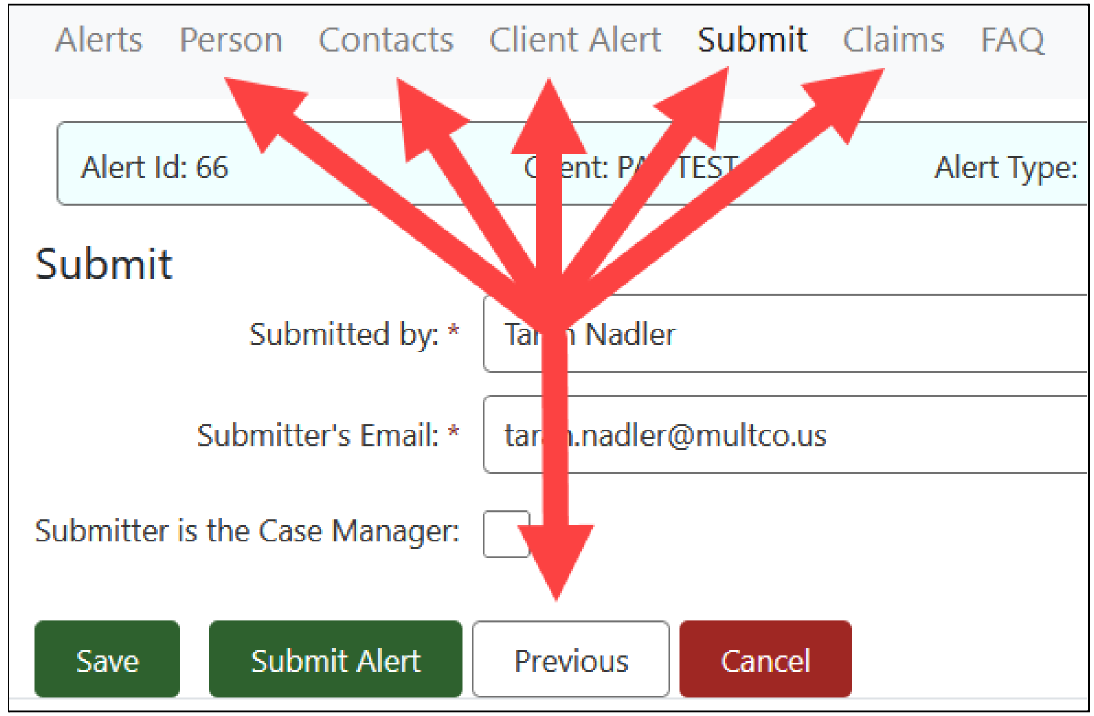


14. The submitter will need to choose their program from the drop down menu. If the case manager is submitting the report, the checkbox “Submitter is the Case Manager” should be selected. To finish, click “Submit Alert.”

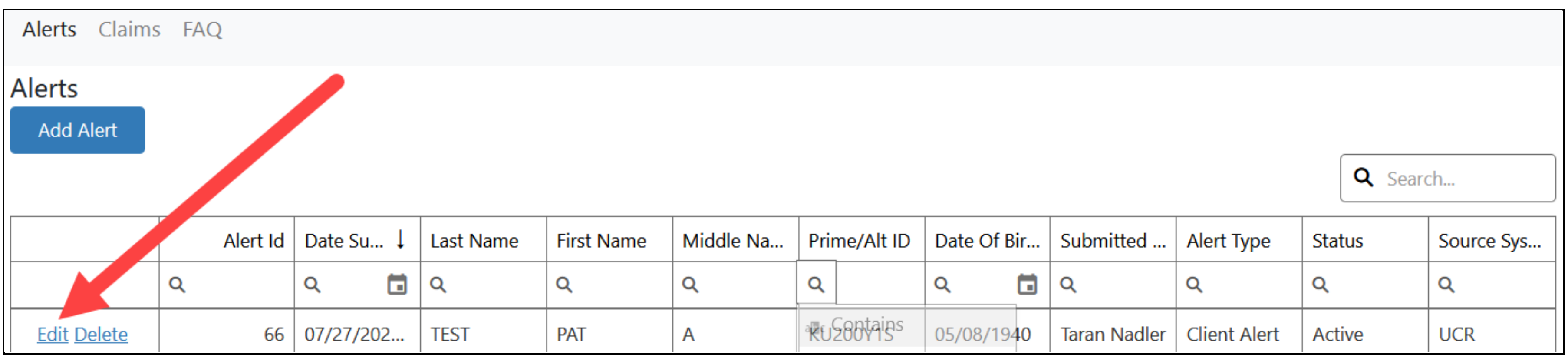




15. If you need to make immediate changes you can select "Previous" or click on any of the navigation tabs.



16. You can go back and edit the Alert if needed to update information.



17. In order to locate an alert that has been written, staff can search by clicking into any of the heading bar search options including Alert Id (if known), last name, or Prime ID.