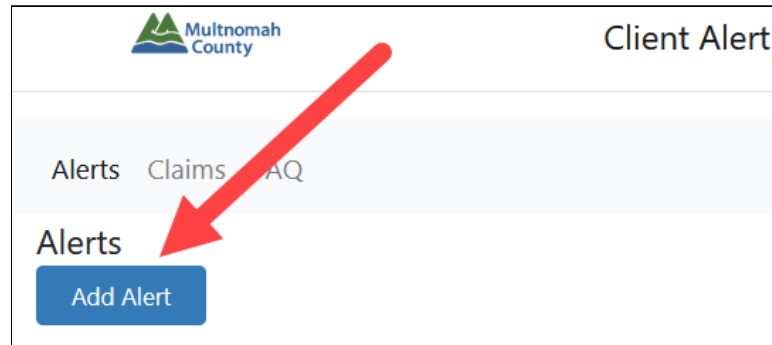


Creating a Client Alert:

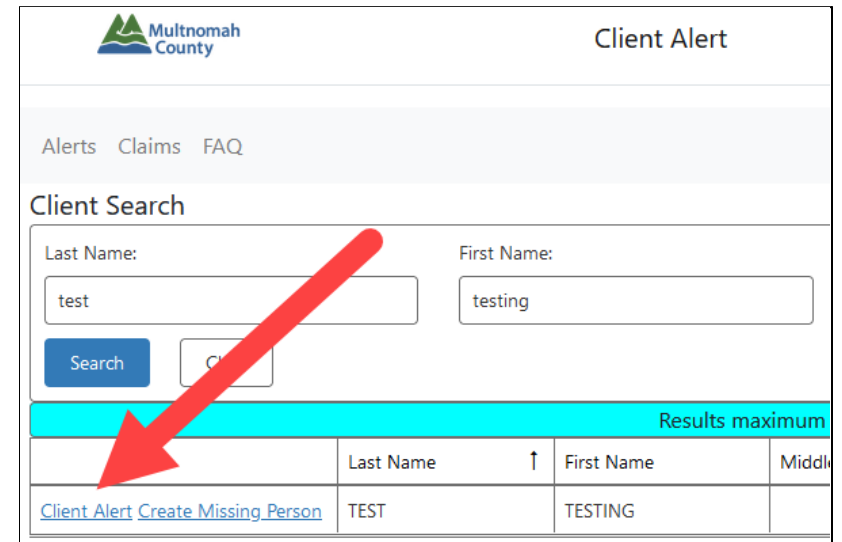
1. Select “Add Alert”



The screenshot shows the Multnomah County Client Alert interface. At the top, there is a logo for Multnomah County and the title 'Client Alert'. Below this, there are three tabs: 'Alerts', 'Claims', and 'FAQ'. The 'Alerts' tab is selected. Under the 'Alerts' tab, there is a sub-tab 'Alerts' and a blue button labeled 'Add Alert'. A red arrow points to the 'Add Alert' button.

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”



The screenshot shows the Multnomah County Client Alert interface. At the top, there is a logo for Multnomah County and the title 'Client Alert'. Below this, there are three tabs: 'Alerts', 'Claims', and 'FAQ'. The 'Alerts' tab is selected. Under the 'Alerts' tab, there is a sub-tab 'Alerts' and a blue button labeled 'Add Alert'. A red arrow points to the 'Add Alert' button.

Client Search

Last Name: First Name:

Results maximum

	Last Name	First Name	Middle
Client Alert Create Missing Person	TEST	TESTING	

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).

Alert Id: 66		Client: PAT TEST		Alert Type: Client Alert		Alert Status: Pending Active		Date Submitted:		Source System: UCR	
Person											
First Name:	PAT			Last Name:	TEST			Middle Name:	A		
Preferred Name:				Gender:	Female			Prime/Alt Id:	KU200Y1S		
Date of Birth:	5/8/1940			Primary Spoken Language:	English			Needs Interpreter:	No		
Military Status:				Phone:	(503) 252-5879						
Race:	White										
Ethnicity:	Not Latino/Hispanic										
Address											
Provider:											
Address Line 1:	7520 SE Madison										
Address Line 2:											
City:	Portland			State:	OR			Zip:	97215		

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

Alert Id: 66		Client: PAT TEST		Alert Type:		
Person						
First Name:	PAT			Last Name:		
Preferred Name:				Gender:		
Date of Birth:	5/8/1940			Primary Spoken Language:		
Military Status:						
Race:	White					
Ethnicity:	Not Latino/Hispanic					
Address						
Provider:						
Address Line 1:	7520 SE Madison					
Address Line 2:						
City:	Portland			State:		
Next						

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

This screenshot shows the 'Contacts' section of a form. At the top, a header bar contains the following information: Alert Id: 66, Client: PAT TEST, Alert Type: Client Alert, Alert Status: Pending Active, Date Submitted: (empty), and Source System: UCR. Below the header, the 'Contacts' section contains several fields. On the left, there is a 'Case Manager' dropdown menu with 'Brian HUGHES' selected. Below it are fields for 'Preferred Phone Number' (containing '(503) 988-4907') and 'Case Manager's Program' (a dropdown menu with 'Aging, Disability and Veterans Services Division' selected). Further down are fields for 'Public Guardian Name' and 'Preferred Phone Number' (with a placeholder '() __-__'). On the right side, there is a 'Case Manager Email' field containing 'brian.hughes@multco.us', a 'Phone Type' dropdown menu with 'Work' selected, a checkbox for 'Can the Case Manager be contacted:' which is unchecked, a 'Public Guardian Email' field, and a 'Phone Type' dropdown menu with 'Select One' selected. At the bottom of the form are five buttons: 'Save' (green), 'Save And Next' (green), 'Previous' (light blue), 'Next' (light blue), and 'Cancel' (red). Three red arrows originate from the 'Case Manager' dropdown and point to the 'Case Manager Email', 'Preferred Phone Number', and 'Case Manager's Program' fields, illustrating the auto-population process.

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

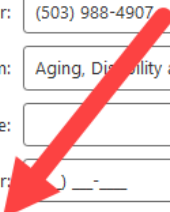
This screenshot shows the same 'Contacts' section of the form as the previous one, but with red arrows highlighting the optional fields for a public guardian. The header bar and the Case Manager information remain the same. The red arrows point to the 'Public Guardian Name', 'Preferred Phone Number', 'Public Guardian Email', and 'Phone Type' fields, indicating where to enter this information. The 'Save' and 'Save And Next' buttons are highlighted in green, while the 'Previous', 'Next', and 'Cancel' buttons are light blue.

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.**

Alert Id: 66	Client: PAT TEST	Alert Type: Client Alert	Alert Status: Pending Active	Date Submitted:	Source System: UCR
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Contacts

Case Manager:	Brian HUGHES	Case Manager Email:	brian.hughes@multco.us
Preferred Phone Number:	(503) 988-4907	Phone Type:	Work
Case Manager's Program:	Aging, Disability and Veterans Services Division	Can the Case Manager be contacted:	<input type="checkbox"/>
Public Guardian Name:		Public Guardian Email:	
Preferred Phone Number:		Phone Type:	Select One



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.**

Alert Id: 66	Client: PAT TEST	Alert Type: Client Alert	Alert Status: Pending Active	Date Submitted:	Source System: UCR
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Client Alert

Start Date: *

7/27/2021

End Date: *

End Date is required

Situation Description: *

Briefly describe your client's situation. What the after hours call center will need to know if they call about your client. Please DO NOT USE abbreviations, acronyms, long copy and paste narrative, or jargon.

Call Center Instructions: *

The call center actively listens, provides information and resources, and triages calls. They CANNOT make site visits or approve vouchers. Examples of good instructions: Please remind client to call x next business day, or page on - call consultant.

After Hours Consultant Instructions: *

Consultants can ensure safety until the next business day and provide intervention if critically needed. Please provide specific details instructions.

Situation Description is required

Call Center Instructions is required

After Hours Consultant Instructions is required

End Date is required

Save

Save And Next

Previous

Next

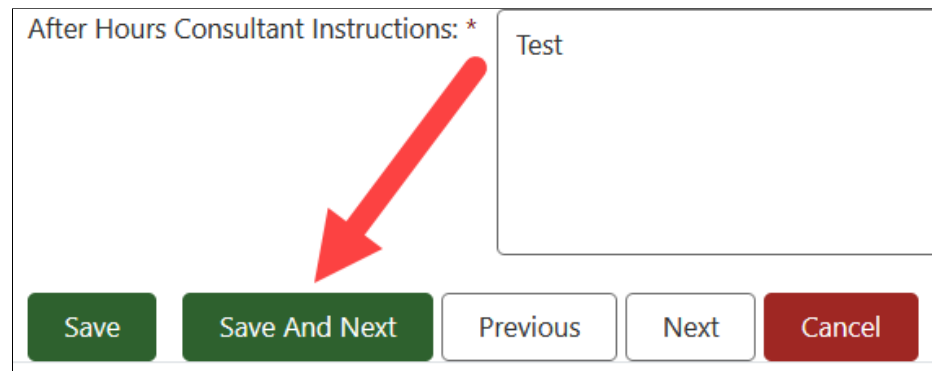
Cancel

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



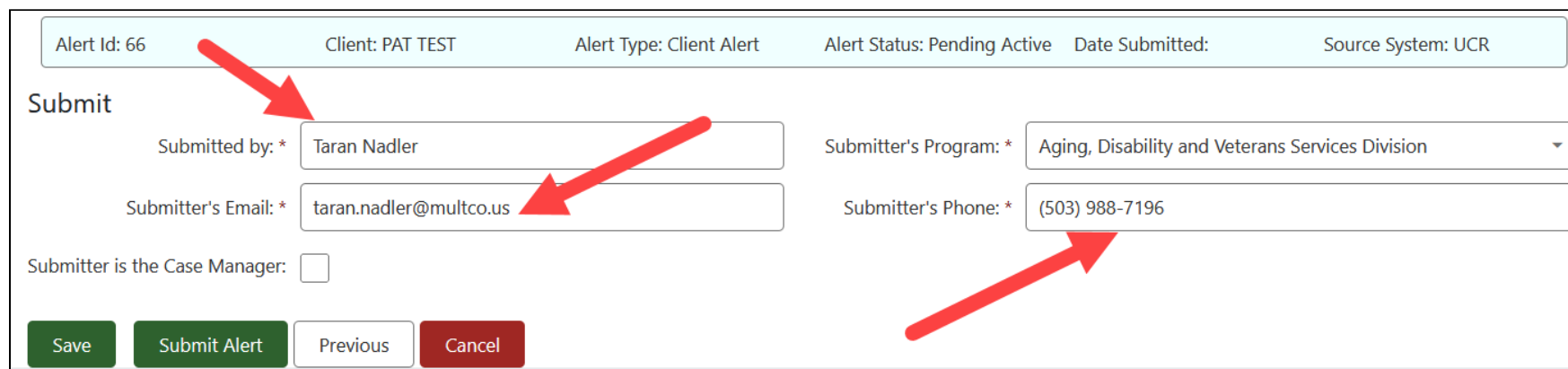
The diagram illustrates the state of a form field before and after user input. On the left, the 'Situation Description: *' field contains placeholder text: 'Briefly describe your client's situation. NOT USE abbreviations, acronyms, lon'. A red arrow points to this text. A dashed arrow points to the right, where the same field now contains the text 'Example of info'. The red arrow now points to the text entered by the user, and the placeholder text has disappeared.

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.**



This form section includes a text area labeled 'After Hours Consultant Instructions: *' containing the word 'Test'. Below the text area are five buttons: 'Save' (green), 'Save And Next' (green), 'Previous' (light blue), 'Next' (light blue), and 'Cancel' (red). A red arrow points from the 'Save And Next' button towards the text area.

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



This form displays autopopulated information for a submission. At the top, a light blue header bar contains the following details: 'Alert Id: 66', 'Client: PAT TEST', 'Alert Type: Client Alert', 'Alert Status: Pending Active', 'Date Submitted:', and 'Source System: UCR'. Below this, the 'Submit' section contains several fields: 'Submitted by: *' with the value 'Taran Nadler', 'Submitter's Email: *' with the value 'taran.nadler@multco.us', 'Submitter's Program: *' with a dropdown menu showing 'Aging, Disability and Veterans Services Division', and 'Submitter's Phone: *' with the value '(503) 988-7196'. There is also a checkbox labeled 'Submitter is the Case Manager:'. At the bottom, there are four buttons: 'Save' (green), 'Submit Alert' (green), 'Previous' (light blue), and 'Cancel' (red). Red arrows point to the 'Submitted by' field, the 'Submitter's Email' field, and the 'Submitter's Phone' field.

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.”

Alert Id: 66	Client: PAT TEST	Alert Type: Client Alert	Alert Status: Pending Active	Date Submitted:	Source System: UCR
--------------	------------------	--------------------------	------------------------------	-----------------	--------------------

Submit

Submitted by: * Taran Nadler

Submitter's Program: * Aging, Disability and Veterans Services Division ▼

Submitter's Email: * taran.nadler@multco.us

Submitter's Phone: * (503) 988-7196

Submitter is the Case Manager: ☐

Alerts Person Contacts Client Alert **Submit** Claims FAQ

Alert Id: 66	Client: PAT TEST	Alert Type:
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Submit

Submitted by: * Taran Nadler

Submitter's Email: * taran.nadler@multco.us

Submitter is the Case Manager: ☐

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

Alerts Person Contacts Client Alert Submit Claims FAQ

Alert Id: 66 Client: PAT TEST Alert Type:

Submit

Submitted by: * Taran Nadler

Submitter's Email: * taran.nadler@multco.us

Submitter is the Case Manager: ☐

Save

Submit Alert

Previous

Cancel

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

Alerts Claims FAQ

Alerts

Add Alert

Search...

	Alert Id	Date Su... ↓	Last Name	First Name	Middle Na...	Prime/Alt ID	Date Of Bir...	Submitted ...	Alert Type	Status	Source Sys...
	🔍	🔍 📅	🔍	🔍	🔍	🔍	🔍 📅	🔍	🔍	🔍	🔍
Edit Delete	66	07/27/202...	TEST	PAT	A	Contains RU200Y15	05/08/1940	Taran Nadler	Client Alert	Active	UCR

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.