CM08: Alerts

May 12, 2017

Release# or Date	CR# or Incident #	Change Description	Author(s)	Section Modified
10-20-2015		Initial updates due to Supported Platforms review	Robert Thornton	1.1, 1.2.1, 1.2.1.2, 1.2.2.2, 1.2.2.3
10-30-2015		Peer Review for Supported Platforms updates	Gina Schendowich	1.1, 1.2.1, 1.2.1.2, 1.2.2.2, 1.2.2.3
11-6-2015		Final Review for Supported Platforms	Kortney Rudd	Entire Document

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1.1. Introduction

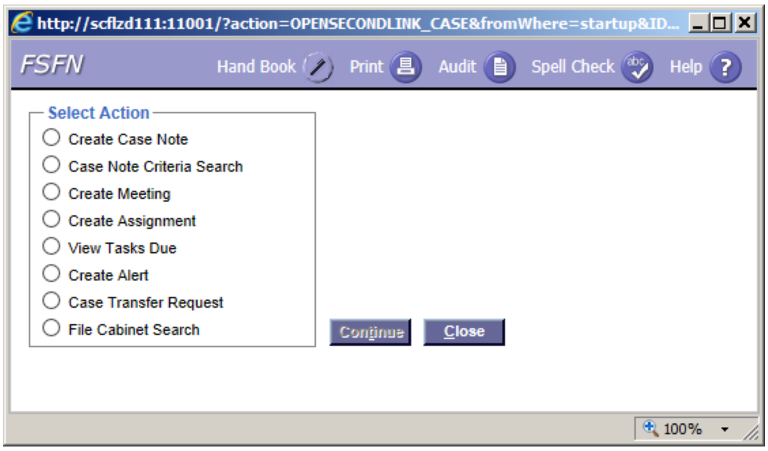
Alerts allow for the creation of messages pertinent to a case participant. Alerts are information that provides warning of condition for a participant. Alerts types include the following: Foster Home Under Investigation, Request to Locate, Pick-up Order, and CSEC Value-Confirmed Involvement. The alerts of type Abducted, Parent/Caregiver Absconded, and Runaway are automatically created and ended by the Missing Child Report processes. All other Alerts automatically expire in 180 days.

To access Alerts, the user must perform one of the following:

- Select Create Alert from the Actions hyperlink within a case, which provides the capability to create a new Alert for a case participant or person.
- Within the Outliner, select the Case expando, expand the Alert category and select the appropriate Alert hyperlink. If user has proper security rights, the Maintain Alerts page will display in edit mode; otherwise, the page will display in view only mode.
- Select Alerts hyperlink from Case or Person search results which launches the Alerts page in view only mode. Note: Only those users with proper security rights may update Alerts.

1.2. Pages

1.2.1. Page - Actions



1.2.1.1.Page Navigation and Overview

The Actions page is launched by selecting the Action hyperlink at the Case level from the Case on the worker's desktop.

The Actions page allows the worker to initiate various actions including Create Alert. Once the worker selects the Create Alert radio button and selects the Continue button, the Maintain Alerts page launches in edit mode. Note: Only those users with appropriate security rights will be able to Create Alerts. All other workers will only have the ability to view Alerts.

1.2.1.2.Page Information

Group Box:	Select Action	
Fields:	Create Case Note	Launches Case Note page
	Case Note Criteria Search	Launches Case Not Criteria Search page
	Create Meeting	Launches Meeting page
	View Tasks Due	Launches View Tasks Due page
	Create Alert	Launches Maintain Alert page
	Case Transfer Request	Launches Case Transfer Request page
	File Cabinet Search	Launches File Cabinet Search page
Options	None	

Links	None	
Buttons	Continue	Standard Continue processing

1.2.1.3.Background Processing

- When the user selects the Actions hyperlink beside a case, the Actions page launches.
- To launch the Maintain Alert page, the user must select the Create Alert radio button then the Continue Button.

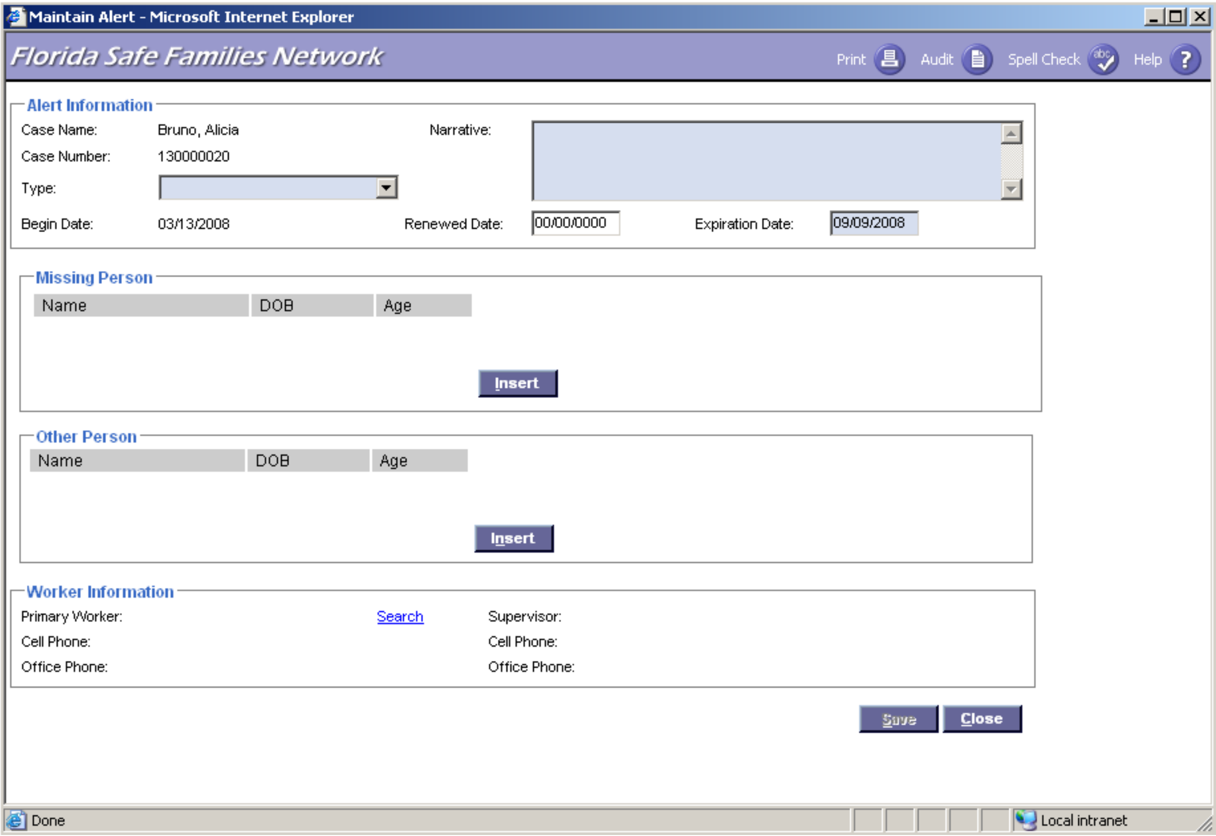
1.2.1.4.Save Processing

- None

1.2.1.5.CRUD Matrix:

- None

1.2.2. Page – Maintain Alert



1.2.2.1.Page Navigation and Overview

The Maintain Alert page is launched by selecting Create Alert from the Actions hyperlink at the Case level from the Case expando on the worker's desktop. Note: Only those users with appropriate security rights will be able to create, modify and expire Alerts. All other workers can view Alerts only.

To create an Alert, the user (with appropriate security rights) selects the Insert button in the Missing Person group box. The Case Participants and Other Contacts page launches with a participant/professional/other contacts selection box so the user can select the appropriate Missing Person(s) for the Alert. Participants are defined as persons involved directly in the case such as mother, father or child. Professional/Other Contacts are defined as all other persons involved in the case such as aunt or uncle. If the user selects the incorrect participant/professional/other contacts, the delete hyperlink enables the user to remove the selection from the group box. Once Missing Person(s) have been established, the user then selects the Insert button in the Other Person group box. The same participant/professional/other contacts selection box launches so the user can select the appropriate Other Person(s) involved in the Alert. If the user selects the incorrect participant/professional/other contacts, the delete hyperlink enables the user to remove the selection from the group box.

If an Alert has to be created for an Out-of-State person, a Service Referral with a type of "ICPC/Other" will be created by a user with the appropriate security rights; the user will then create a case with a case type of "Out-of-Town" with a default assignment to a "shell" worker. Further definition on how Service Referrals and Cases are created is defined within the SM02 and SM04a Topic Papers.

The name of the currently assigned primary worker of the case defaults in the Primary Worker section of the Worker Information group box. The Primary Worker's Supervisor information also defaults in the Supervisor section of the Worker Information group box. If this information needs to be updated, the user may select the Search hyperlink to search and retrieve the appropriate worker. If a different worker is retrieved, the retrieved worker's phone and Supervisor information is also retrieved and pre-populated into the Worker Information group box.

Once the Alert is created, only users with the appropriate security rights are able to update an Alert. If the case that contains the Alert is associated to the Supervisor's Unit, the user is able to drill down to the case within the Outliner. By drilling down further into the case, the user is able to drill down into the Alerts section and is then able to select the appropriate Alert hyperlink (if more than one). Once the Alert is launched and the user has the appropriate security rights, the user is able to update and save the Alert.

All users are able to view Alerts. Users are able to launch Alerts by one of the following:

- If the Alert is associated to a case on the user's Outliner, the user is able to drill down to the case within the Outliner. The user is able to drill down into the Alerts section and is able to select the appropriate Alert hyperlink (if more than one). Once the Alert is launched, the system will verify the user's security. If the user does not have the appropriate security rights, the user will only be able to view the Alert.
- If the user is searching for a case within the system and the result has an associated Alert, the case will display the Alert icon. The user is able to drill down into the Alerts section and is able to select the appropriate Alert hyperlink (if more than one). The Alert is launched in view only mode.
- If the user is searching for a person within the system and the result has an associated Alert, the person will display the Alert icon. Upon drilling down further into person, the user is able to drill down into the case(s) section and then the Alerts section where the user is able to select the appropriate Alert hyperlink (if more than one). The Alert is launched in view only mode.

1.2.2.2.Page Information

Group Box:	Alert Information	
Fields:	Case Name	Name of case associated with a created Alert; system derived; not editable
	Case Number	Number of case associated with a created Alert; system derived; not editable
	Type	Type of Alert; user selected drop-down value; editable; required; no default value
	Begin Date	Begin Date of Alert (creation date); pre-populates with current date; required; default value of current date
	Renewed Date	Date that Alert was renewed; user entered date field which cannot be later than 180 days from current date; not required; no default value
	Expiration Date	Date Alert expires; user entered date field; initially defaults to 180 days from Begin Date and is editable within the 180 day time limit; date will update to 180 days from date entered in Renewed Date when user enters Renewed Date
	Narrative	Narrative box allowing 1000 characters of text to be entered by user; required; no default value
Options	None	
Links	None	
Buttons	None	
Group Box	Missing Person	
Fields	Name	Name of the Missing Person involved in the Alert; pre-populated name of the selected participant(s) from the participant/professional/other contacts selection box; not editable; conditionally required (there must be at least one Missing Person); no default value

	DOB	DOB of the Missing Person; pre-populated DOB of the selected participant from the participant/professional/other contacts selection box; not editable
	Age	Age of the Missing Person; pre-populated Age of the selected participant from the participant/professional/other contacts selection box; not editable
Options	None	
Links	Delete	Selecting the Delete hyperlink deletes the participant row in the Missing Person group box
Buttons	Insert	Selecting the Insert Button inserts a row in the Missing Person group box, for every participant selected in the participant/professional/other contacts selection box. The participant information pre-fills to the Name, DOB and Age fields
Group Box	Other Person	
Fields	Name	Name of the Other Person involved in the Alert; pre-populated name of the selected participant(s) from the participant/professional/other contacts selection box; not editable; not required; no default value
	DOB	DOB of the Other Person; pre-populated DOB of the selected participant from the participant/professional/other contacts selection box; not editable; not required; no default value
	Age	Age of the Other Person; pre-populated Age of the selected participant from the participant/professional/other contacts selection box; not editable; not required; no default value
Options	None	
Links	Delete	Selecting the Delete hyperlink deletes the

		participant/professional/other contacts row in the Other Person group box
Buttons	Insert	Clicking the Insert Button inserts a row in the Other Person group box, for every participant selected in the participant/professional/other contacts selection box. The participant information pre-fills to the Name, DOB and Age fields
Group Box	Worker Information	
Fields	Primary Worker	Name of the currently assigned primary worker of the case; pre-populated worker name; not editable; required
	Cell Phone	Primary worker's cell phone number; pre-populated from Maintain Worker; not editable; not required
	Office Phone	Primary worker's office phone number; pre-populated from Maintain Worker; not editable; not required
	Supervisor	Name of the currently assigned primary worker's supervisor; pre-populated supervisor name; not editable; required
	Cell Phone	Primary worker supervisor's cell phone number; pre-populated from Maintain Worker; not editable; not required
	Office Phone	Primary worker supervisor's office phone number; pre-populated from Maintain Worker; not editable; not required
Options	None	
Links	Search	Selecting the Search hyperlink launches the data retrieval worker search page. Once worker is selected, Worker name, cell phone, office phone; Supervisor's name, cell phone, and office phone will display in the Worker Information group box
Buttons	Save	Standard Save processing
	Close	Standard Close processing

1.2.2.3. Background Processing

- ***Access:*** Only users with appropriate security rights will be able to create, modify and expire Alerts. However, all users can view Alerts.
- ***Existing Alerts:*** If an Alert exists for the Case, the Case icon will be updated to an Alert icon. Once the Alert has expired, the Case icon will change from an Alert icon back to a Case icon. If a user searches for a person with an associated Alert, the Person icon will be updated to an Alert icon. Once the Alert has expired, the Person icon will change from an Alert icon back to a Person icon.
- ***Editing Alerts:*** If the user has the appropriate security rights and the Alert is associated to their Unit, the user is able to select the appropriate Alert hyperlink (if more than one). Once the Alert is launched, the user is able to update and save the Alert.
- ***Case Name and Case Number:*** Case Name and Case Number will be brought forward from Maintain Case and will be displayed at the top of the page.
- ***Missing Person Group Box:*** To insert a new row into the Missing Person group box, the user will select the Insert button. The Insert Button will launch a 'participant selection' list of all Case participants, which is taken from the ALERTS_PART table. User may multi select participants from participant selection. Once participant(s) is selected, their Name, DOB and Age will display in rows below Missing Person group box. These fields are not editable. If incorrect participant is selected and displays in Missing Person group box, user may select Delete hyperlink to remove selected row.
- ***Other Person Group Box:*** To insert a new row into the Other Person group box, the user will select the Insert button. The Insert Button will launch a 'participant selection' list of all Case participants which is taken from the ALERTS_PART table. User may multi select participants from participant selection. Once participant(s) is selected, their Name, DOB and Age will display in rows below Other Person group box. These fields are not editable. If incorrect participant is selected and displays in Other Person group box, user may select Delete hyperlink to remove selected row.
- ***Primary Worker:*** Currently assigned primary worker of the case defaults in the Primary Worker field. The primary worker's cell phone and office phone are also displayed. This information is brought forward from the Maintain Worker page. If worker information needs to be updated, user may select the Search hyperlink. Data Retrieval Worker Search is launched and the user may search and retrieve the different worker. By updating the worker, a new assignment to the case is not created. The Primary Worker field is updated only on the Alerts page.

- ***Supervisor:*** Most recent assignment worker's Supervisor defaults in the Supervisor field. The Supervisor's cell phone and office are also displayed. This information is brought forward from the Maintain Worker page. If primary worker is updated, the updated worker's Supervisor will display in the Supervisor field. Supervisor's cell phone and office phone are also retrieved and displayed.
- ***Alert Expiration:*** There are two ways in which an Alert can expire. If a user enters a valid date into the Expiration Date field (cannot be before the Begin Date), the Alert expires on that date. If 180 days have passed since the Begin Date or Renewed Date of the Alert, the Alert expires. The Alert is not deleted, but is maintained historically and attached to the Case. Note: When a Case closes, the Alert expires ONLY based on its own expiration date; it does not expire with the Case closure.

1.2.2.4.Save Processing

- Upon save, Alert is created or updated accordingly. All information is stored within the ALERTS table.
- Case icon is updated from a manila folder to the Alert icon. Once the Alert has expired (expiration date is either entered or 180 days have elapsed), the Alert icon will change back to a manila folder. This will be a visual notification to users that the Alert is no longer current.
- Person icon updated from Person icon to the Alert icon. Once the Alert has expired (expiration date is either entered or 180 days have elapsed), the Alert icon will change back to a Person icon. This will be a visual notification to users that the Alert is no longer current.
- The Alert icon will be displayed upon drilling down into a case. Upon selecting, the Maintain Alert page is displayed for the selected case.

1.2.2.5.CRUD Matrix:

Table Name	Create	Read	Update	Delete
CASE_MASTER		X		
CASE_PART		X		
ALERTS	X	X	X	
ALERTS_PART	X	X		X
ASSIGNMENT		X		
PERSON		X		

1.2.3. Outliner – Alerts

1.2.3.1. Page Navigation and Overview

The Alerts within the Outliner is used to store and display Alerts associated to a case. Users assigned to the case may view the Alert(s) by selecting the Alert hyperlink. Once the Alert hyperlink is launched, the Maintain Alert page is displayed. If the user does not have appropriate security rights, the Maintain Alert page is displayed in view only mode. If the user has appropriate security rights, the Maintain Alert page is displayed in edit mode, enabling the user to update the Alert if required.

1.2.3.2. Page Information

Group	None	

Box:		
Fields:	Outliner: Level 1	The level 1 of the Outliner displays a Case expando, all case work is displayed under the Case expando including Alerts. If the Case has an associated Alert, the Case Icon changes to an Alert Icon. Once the Alert has expired, the Case expando displays the original Case Icon
	Outliner: Level 2	Level 2 of the Outliner displays the case work categories for each case selected. If the case has an associated Alert, an Alert category will display
	Outliner: Level 3	Level 3 of the Outliner displays the case work items for each category. If the case has an associated Alert, Alert item(s) will display
Options	None	
Links	None	
Buttons	None	

1.2.3.3.Background Processing

- Selecting the Alert item hyperlink launches the Maintain Alert page. If the user does not have appropriate security rights, the Maintain Alert page will launch in view only mode. If the user has appropriate security rights, the Maintain Alert page will launch in edit mode.

1.2.3.4.Save Processing

- None

1.2.3.5.CRUD Matrix

Table Name	Create	Read	Update	Delete
WORKER		X		
ALERT		X		

1.3. Inventories

1.3.1. Table Description

Table Name	Description
ALERTS	The ALERTS table stores information regarding all Alerts in Florida Safe Families Network. All related Florida Safe Families Network processes build and maintain this data.
ALERTS_PART	This table maintains information pertaining to the PERSONs involved in an ALERT. SM04a (Maintain Case) processes build and maintain this table.

1.3.2. Reference Data

1.3.2.1.Drop Down

FSFN Page: Maintain Alert
Field Name: Type
Table Name: ALERTS
Table Field: CD_ALERT_TYPE

1.3.3. Automated Messages

- None

1.3.4. Checklists

- None

1.3.5. Ticklers

- None

1.3.6. Notifications

- None

1.3.7. Text Templates

- None

1.3.8. Reports

- All reports' designs are documented in the RP01 Reports Topic Paper. Please refer to the CM08 section of that topic paper for information on the reports (if any) related to this topic. Please note that not all topics have associated reports.

1.3.9. Triggers

- None

1.3.10. Batch Programs

- None

1.4. Requirements Covered In This Paper

- IA-TRAC – 001

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