



## Alerts and Staff Notes tabs

### Alerts:

1. Enter Participant number in the Participant Or Family # field

**OR** if the Participant number is not known:

2. Click on the Alerts tab on the Participant Summary page

Participant Care Plan Alerts Staff Notes Referrals

Alerts All

No Alerts Found.

View All Alerts

3. Click on Create New Alert button

4. Create a New Alert view:

### Create A New Alert

- Family  
 Participant

**Type:**

**Note:**

## 5. Select Family or a Participant

- If Participant is selected, use dropdown to select a Participant

Family  
 Participant

Debbie Adair ▼  
 Deidra Adair  
 Kinsey Adair  
 Debbie Adair  
 Ginny Adair  
 Drake Adair

## 6. Select an Alert Type from the dropdown

- **General:** Used for general information related to an appointment (ex: Updated contact information)
- **Nutrition:** Used for information provided outside of a nutrition education appointment (ex: Mom requested handout on weaning)
- **RD:** used to share information with registered dietitian or used by registered dietitian to share information with other staff. (ex: Weigh baby every visit until 1 year of age)
- **Certification:** Used for information specific to certification (ex: Needs to bring proof of residency next appointment)
- **Breastfeeding:** Used for Information specific to breastfeeding (ex: Has rental BP thru Dec. 2099)
- **Confidential:** Used for information that is needed for providing WIC services but doesn't need to be on forms that could be printed such as care plans (ex: Use cell phone number for all contacts)

**Type:**

General ▼  
 General  
 Nutrition  
 RD  
 Certification  
 Breastfeeding  
 Confidential  
 Other



11. Click on the Edit button

**NOTE:** The Alert can be edited within 24 hrs, by the staff person who created it or Local Admin.



12. Edit the information

### Edit Alert

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Type:

Breastfeeding ▾

Note:

Has a rental BP thru Dec

Alert

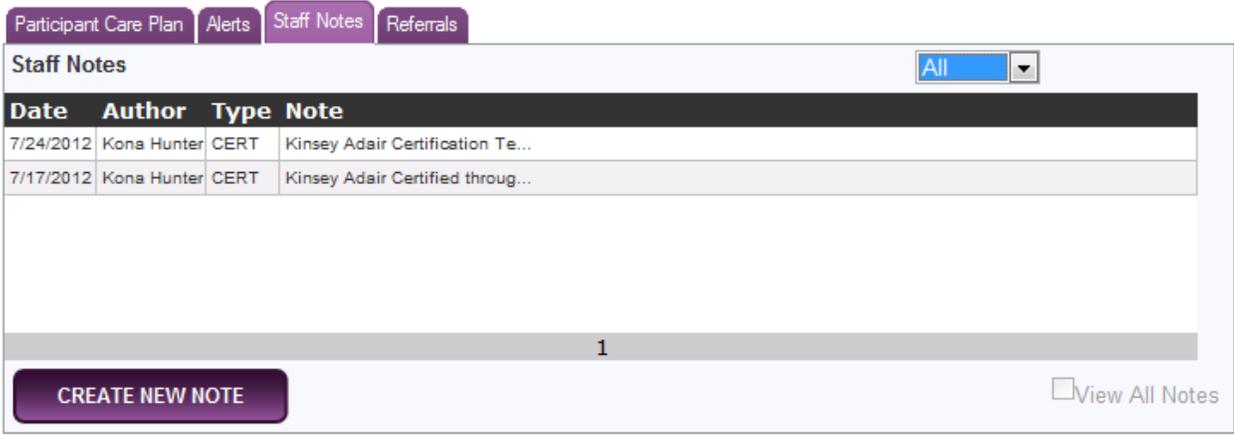
13. Save/Cancel buttons:

- Click on Save to save the entered information
- Click on Cancel to cancel the transaction

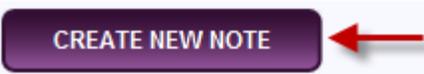


# Staff Notes:

- 1. Click on the Staff Notes tab on the Participant Summary page



- 2. Click on Create New Note button



- 3. Create a New Note view:

The screenshot shows the 'Create A New Note' form. It has a title 'Create A New Note' with a horizontal line underneath. There are two radio buttons: 'Family' (unselected) and 'Participant' (selected). Next to the 'Participant' radio button is a dropdown menu showing 'Debbie Adair'. Below this is a 'Type:' label followed by a dropdown menu set to 'General'. At the bottom is a 'Note:' label followed by a large empty text area.



## 4. Select Family or a Participant

- If Participant is selected, use dropdown to select a Participant

Family

Participant

Debbie Adair	▼
Deidra Adair	
Kinsey Adair	
Debbie Adair	
Ginny Adair	
Drake Adair	

## 5. Select an Staff Note Type from the dropdown

- **General:** Used for general information related to an appointment (ex: Updated contact information)
- **Nutrition:** Used for information provided outside of a nutrition education appointment (ex: Mom requested handout on weaning)
- **RD:** used to share information with registered dietitian or used by registered dietitian to share information with other staff. (ex: Weigh baby every visit until 1 year of age)
- **Certification:** Used for information specific to certification (ex: Needs to bring proof of residency next appointment)
- **Breastfeeding:** Used for Information specific to breastfeeding (ex: Has rental BP thru Dec. 2099)
- **Confidential:** Used for information that is needed for providing WIC services but doesn't need to be on forms that could be printed such as care plans (ex: Use cell phone number for all contacts)

Type:

General	▼
General	
Nutrition	
RD	
Certification	
Breastfeeding	
Confidential	
Other	

6. Notes

- Enter information related to Staff Note type in Note field (see Staff Note Type definitions above)

**Note:**

7. Save/Cancel buttons:

- Click on Save to save the entered information
- Click on Cancel to cancel the transaction



8. Viewing the alerts

- Click on the dropdown to sort by the type of Alert to view

**NOTE:** Authorized Signer and Health Screen information is auto populated, and are not editable

Participant Care Plan				Alerts	Staff Notes	Referrals
<b>Staff Notes</b>						
<b>Date</b>	<b>Author</b>	<b>Type</b>	<b>Note</b>	<div style="border: 1px solid black; padding: 2px;">             All              General              Nutrition              RD              Cert              BRFD              Conf              Auth. Signer              Health Screen              Other           </div>		

9. Click on the line item to Edit/View

Participant Care Plan				Alerts	Staff Notes	Referrals
<b>Alerts</b>						
<b>Date</b>	<b>Author</b>	<b>Type</b>	<b>Note</b>			
8/2/2012	Kona Hunter	GEN	Updated contact information	←		
8/2/2012	Kona Hunter	BRFD	Has a rental BP thru Dec			
8/2/2012	Kona Hunter	RD	RD referral, Code 111, 133. L...			



10. Click on the Edit button

**NOTE:** The Alert can be edited within 24 hrs, by the staff who created it or Local Admin



11. Edit the information

### Edit Note

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**Type:**  
General ▼

**Note:**  
Updated contact information

Alert

12. Save/Cancel buttons:

- Click on Save to save the entered information
- Click on Cancel to cancel the transaction



13. By selecting the Alert box the Staff Notes will be moved to the Alerts tab

