



## Alerts and Staff Notes tabs

### Alerts:

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

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

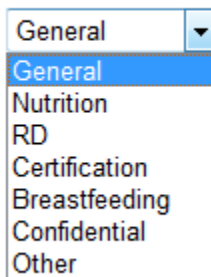
- If Participant is selected, use dropdown to select a Participant

Family  
 Participant



## 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:**


7. Notes

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

**Note:**

8. Save/Cancel buttons:

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



9. 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>			All
<b>Date</b>	<b>Author</b>	<b>Type</b>	<b>Note</b>

10. 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		BRFD	Has a rental BP thru Dec
8/2/2012		RD	RD referral, Code 111, 133. L...



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:

Note:

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

Participant Care Plan Alerts **Staff Notes** Referrals

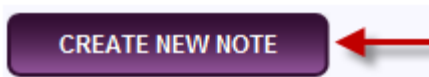
Staff Notes All

Date	Author	Type	Note
7/24/2012	[Redacted]	CERT	Certification Te...
7/17/2012	[Redacted]	CERT	Certified throug...

1

[CREATE NEW NOTE](#) [View All Notes](#)

2. Click on Create New Note button



3. Create a New Note view:

**Create A New Note**

Family

Participant [Redacted]

**Type:**

General

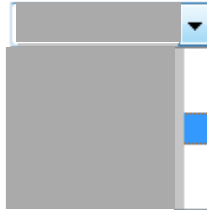
**Note:**

[Empty text area]

## 4. Select Family or a Participant

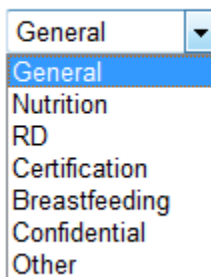
- If Participant is selected, use dropdown to select a Participant

Family  
 Participant



## 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:**


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>			All
<b>Date</b>	<b>Author</b>	<b>Type</b>	<b>Note</b>
			General
			Nutrition
			RD
			Cert
			BRFD
			Conf
			Auth. Signer
			Health Screen
			Other

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		GEN	Updated contact information
8/2/2012		BRFD	Has a rental BP thru Dec
8/2/2012		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

