



**Department of Health Care Services
Children's Medical Services Network**



CMS Net Web Section Case Alerts Section 48

CMS Net Web Section - Section 48

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1 DEFINITIONS, ABBREVIATIONS, & ACRONYMS

The following terms, abbreviations, and acronyms may be used in this document:

Term	Definition
CCS	California Children's Services
CIN	Client Identification Number
CMS	Children's Medical Services
CMS Net	CMS Case Management System
CMS Net Legacy	CMS Case Management System – Legacy Application
CMS Net Web	CMS Case Management System – Web Application
DHCS	Department of Health Care Services
GHPP	Genetically Handicapped Persons Program
HCP or HP	Health Care Plan
HFP or HF	Healthy Families Plan
ICD	Int'l Classification of Diseases (Diagnosis/Procedure Code)
MCP	Managed Care Plan
MEDS	Medi-Cal Eligibility Data System
PEDI	Provider Electronic Data Interchange
NPI	National Provider Identifier
PMF	Provider Master File (Medi-Cal Provider list)
SAR	Service Authorization Request
SCC	Special Care Center

Table 1-1

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2 BACKGROUND

Case Alerts allows individuals to make internal notes about a CCS or GHPP case that can be viewed by CMS Net users to alert them of important information about the client. A link to Case Alerts appears in the client header in CMS Net Web and flashes in red with an indicator of how many alerts exist on the case.

In CMS Net Legacy, users are prompted to view alerts when they enter the case. Users may also view alerts by going to the Case Alerts menu option, then selecting the client.

The Case Alerts module replaces the legacy module called Electronic Post It Notes and exists in CMS Net Web and will remain in CMS Net Legacy until it is phased out completely.

3 INTRODUCTION

The Case Alert option allows a user to enter, edit, print or delete a BRIEF note on a client's record that appears as a prompt to view alerts when entering a record. This option provides a way to alert another user of issue(s) associated to the case. Example: over 40k, turning 21 check b-day or client deceased do not contact family. This does not replace the narrative or comment function.

Important note: *Case Alerts are NOT a legal part of the record.* All Case Alert entries can be viewed, edited or deleted by anyone within the client's legal county.

Case Alerts are used for various items such as:

- Alerting users of important notes they may need to know about a case when speaking to the family.
- Reminders to ask a client for additional information the next time they contact CCS.
- Alerting users of important information they should be aware of when working on the case.

4 ACCESSING CASE ALERTS

The Case Alerts appears on any screen that contains a Patient Header or Client Information Header. Located in the top right of the header, the link is displayed in a steady blue color when no alerts are on the case and flashes in red for cases that contain alerts. The Case Alerts link also displays a count after the link, indicating how many alerts are currently on the case.

Case Alerts, previously known as Electronic Post It Notes, are still available in CMSNet Legacy until the system is phased out completely.

4.1 Patient Header



Figure 4-1

4.2 Client Information Header



Figure 4-2

4.3 Case Alerts Link – No Alerts

Link is blue and is steady when there are no alerts. A zero count is displayed after the link.

[Case Alerts \(0\)](#)

Figure 4-3

4.4 Case Alerts Link – With Alerts

Link flashes between blue and red colors when there are alerts. A count is displayed after the link.

[Case Alerts \(1\)](#)

Figure 4-4

5 ADD CASE ALERT

1. Click 'Case Alerts' link, in the Client Information Header or Patient Header.

Figure 5-1 – Client Information Header

Figure 5-2 – Patient Header

2. A pop-up window is displayed.

Figure 5-3

3. Click 'Add Alert' button. A new text box appears.

Figure 5-4

4. Enter text of alert. Typing truncates when max limit of 43 characters is reached.

Figure 5-5

5. Click 'Save' button. A notification appears confirming the save was successful.

Figure 5-6

6. Click the 'Add Alert' button to add additional alerts, or click the Close button or x on the top right corner of the pop-up window to return to the main screen.

6 MODIFY CASE ALERT

1. Click 'Case Alerts' link, in the Client Information Header or Patient Header.

CORRESPONDENCE					
CLIENT INFORMATION					
Client Name:	Client,Test	Case Number:	T983618	Date Of Birth:	01/01/2014

Figure 6-1 – Client Information Header

Registration						
Patient Header						
Patient Name:	* Client	Appellation	Select	* Test	Case Number:	

Figure 6-2 – Patient Header

2. Click the text box of the alert you wish to modify. A checkmark automatically appears in the 'Select' checkbox.

Case Alerts For Client: Client,Test		
<input type="checkbox"/> Select	Case Alerts	Last Updated By: Landry, Raven
<input checked="" type="checkbox"/>	tests	Last Updated On: 03/18/2014 03:26 PM
<input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Add Alert"/> <input type="button" value="Reset"/> <input type="button" value="Print All"/> <input type="button" value="Close"/>		

Figure 6-3

3. Modify the text as desired. Repeat these steps for any additional alerts that need modification. Click the 'Save' button. A notification appears confirming the save was successful.

Case Alerts For Client: Client,Test		
• Case Alert saved successfully.		
<input type="checkbox"/> Select	Case Alerts	Last Updated By: Landry, Raven
<input type="checkbox"/>	test 2	Last Updated On: 03/19/2014 02:54 PM
<input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Add Alert"/> <input type="button" value="Reset"/> <input type="button" value="Print All"/> <input type="button" value="Close"/>		

Figure 6-4

7 DELETE CASE ALERT

1. Click 'Case Alerts' link, in the Client Information Header or Patient Header.

CORRESPONDENCE					
CLIENT INFORMATION					
Client Name:	Client,Test	Case Number:	T983618	Date Of Birth:	01/01/2014

Figure 7-1 – Client Information Header

Registration						
Patient Header						
Patient Name:	* Client	Appellation:	Select	* Test	Case Number:	

Figure 7-2 – Patient Header

2. Click the 'Select' checkbox next to the Case Alert you wish to delete. Click the top box next to the 'Select' header if you wish to delete all alerts.

Case Alerts For Client: Client,Test				
<input type="checkbox"/> Select	Case Alerts		Last Updated By	Last Updated On
<input checked="" type="checkbox"/>	test 2		Landry, Raven	03/19/2014 02:54 PM
<input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Add Alert"/> <input type="button" value="Reset"/> <input type="button" value="Print All"/> <input type="button" value="Close"/>				

Figure 7-3 – Select an Alert

Case Alerts For Client: Client,Test				
<input checked="" type="checkbox"/> Select	Case Alerts		Last Updated By	Last Updated On
<input checked="" type="checkbox"/>	test 2		Landry, Raven	03/19/2014 03:04 PM
<input checked="" type="checkbox"/>	test 3		Landry, Raven	03/19/2014 03:04 PM
<input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Add Alert"/> <input type="button" value="Reset"/> <input type="button" value="Print All"/> <input type="button" value="Close"/>				

Figure 7-4 – Select All Alerts

3. Click 'Delete' button. A notification appears confirming the save was successful.

Case Alerts For Client: Client,Test				
<ul style="list-style-type: none"> • Case Alert Deleted successfully. 				
<input type="checkbox"/> Select	Case Alerts		Last Updated By	Last Updated On
<input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Add Alert"/> <input type="button" value="Reset"/> <input type="button" value="Print All"/> <input type="button" value="Close"/>				

Figure 7-5

8 LAST UPDATED STAMPS

8.1 Last Updated By

'Last Updated By' indicates the most recent user to modify the record.

8.2 Last Updated On

'Last Updated On' indicates the most recent date and time the record was modified. In CMS Net Legacy, there was no time-stamp. Records that indicate the change was made at midnight are converted records that previously had no time-stamp.

8.3 Sorting

Case Alerts may be sorted by 'Last Updated By' or 'Last Updated On'. In order to sort by these fields, click the up arrow to the left of the column header to sort in ascending order, and the down arrow on the right to sort in descending order.

8.3.1 Sort by Last Updated By

Sorting in ascending order lists the Case Alerts by the user who last updated the record, from A-Z

<input type="checkbox"/> Select	Case Alerts	▲ Last Updated By ▼	▲ Last Updated On ▼
<input type="checkbox"/>	Test from Terry - 3	Duperron, Terrence Patrick	03/25/2014 09:29 AM
<input type="checkbox"/>	Test from Terry - 2	Duperron, Terrence Patrick	03/25/2014 09:28 AM
<input type="checkbox"/>	Test from Terry - 1	Duperron, Terrence Patrick	03/25/2014 09:26 AM
<input type="checkbox"/>	test 3	Landry, Raven	03/25/2014 09:32 AM
<input type="checkbox"/>	test 2	Landry, Raven	03/19/2014 03:20 PM
<input type="checkbox"/>	test 1	Landry, Raven	03/19/2014 03:19 PM

Figure 8-1 – Sort Ascending

Sorting in descending order lists the Case Alerts by the user who last updated the record, from Z-A

<input type="checkbox"/> Select	Case Alerts	▲ Last Updated By ▼	▲ Last Updated On ▼
<input type="checkbox"/>	test 3	Landry, Raven	03/25/2014 09:32 AM
<input type="checkbox"/>	test 2	Landry, Raven	03/19/2014 03:20 PM
<input type="checkbox"/>	test 1	Landry, Raven	03/19/2014 03:19 PM
<input type="checkbox"/>	Test from Terry - 3	Duperron, Terrence Patrick	03/25/2014 09:29 AM
<input type="checkbox"/>	Test from Terry - 2	Duperron, Terrence Patrick	03/25/2014 09:28 AM
<input type="checkbox"/>	Test from Terry - 1	Duperron, Terrence Patrick	03/25/2014 09:26 AM

Figure 8-2 – Sort Descending

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8.3.2 Sort by Last Updated On

Sorting in ascending order lists the Case Alerts by the last date and time the record was updated, oldest to newest.

<input type="checkbox"/> Select	Case Alerts	Last Updated By	Last Updated On
<input type="checkbox"/>	test 1	Landry, Raven	03/19/2014 03:19 PM
<input type="checkbox"/>	test 2	Landry, Raven	03/19/2014 03:20 PM
<input type="checkbox"/>	Test from Terry - 1	Duperron, Terrence Patrick	03/25/2014 09:26 AM
<input type="checkbox"/>	Test from Terry - 2	Duperron, Terrence Patrick	03/25/2014 09:28 AM
<input type="checkbox"/>	Test from Terry - 3	Duperron, Terrence Patrick	03/25/2014 09:29 AM
<input type="checkbox"/>	test 3	Landry, Raven	03/25/2014 09:32 AM

Figure 8-3 – Sort Ascending

Sorting in descending order lists the Case Alerts by the last date and time the record was updated, newest to oldest.

<input type="checkbox"/> Select	Case Alerts	Last Updated By	Last Updated On
<input type="checkbox"/>	test 3	Landry, Raven	03/25/2014 09:32 AM
<input type="checkbox"/>	Test from Terry - 3	Duperron, Terrence Patrick	03/25/2014 09:29 AM
<input type="checkbox"/>	Test from Terry - 2	Duperron, Terrence Patrick	03/25/2014 09:28 AM
<input type="checkbox"/>	Test from Terry - 1	Duperron, Terrence Patrick	03/25/2014 09:26 AM
<input type="checkbox"/>	test 2	Landry, Raven	03/19/2014 03:20 PM
<input type="checkbox"/>	test 1	Landry, Raven	03/19/2014 03:19 PM

Figure 8-4 – Sort Descending

9 PRINT CASE ALERTS

1. Click 'Case Alerts' link, in the Client Information Header or Patient Header.

CORRESPONDENCE

CLIENT INFORMATION [Case Alerts \(1\)](#) [Face Sheet](#)

Client Name: Client,Test Case Number: T983618 Date Of Birth: 01/01/2014

Figure 9-1 – Client Information Header

Registration

Patient Header [Case Alerts \(0\)](#)

Last Name: Client Appellation: Select First Name: *Test Middle Name: Case Number:

Figure 9-2 – Patient Header

2. Click the 'Print All' button at the bottom of the screen. There is currently not an option to print only a selection of alerts.

Case Alerts For Client: Client,Test

<input type="checkbox"/> Select	Case Alerts	Last Updated By	Last Updated On
<input type="checkbox"/>	test 1	Landry, Raven	03/19/2014 03:19 PM
<input type="checkbox"/>	test 2	Landry, Raven	03/19/2014 03:20 PM

Save Delete Add Alert Reset Print All Close

Figure 9-3

3. A pop-up window appears with a list of all alerts in a PDF format for printing.

https://cmsdevw.cahwnet.gov/CMS_TS/PDFPrint?actionName=caseAlertPrint&patientId=1263767

File Edit Go to Favorites Help

CALIFORNIA CHILDREN'S SERVICES (CCS)
Case Alerts

Patient Name: Client,Test	Case #: T983618	DOB: 01/01/2014	Med. Elig:
Gender: Female	CIN: 37172183A6	Lgi County: Sacramento	Reg Status: Pending
CaseLoad: 34Z080	Nurse Case Mgr:		Fin. Elig:
			Res. Elig:

Case Alert	Last Updated By	Last Updated On
test 1	Landry, Raven	3/19/14 3:19 PM
test 2	Landry, Raven	3/19/14 3:20 PM

Figure 9-4

4. There are several ways to print from this window.
 - a. Click 'File' then 'Print' from the file menu at the top of the window. Click 'Print'.
 - b. Right click anywhere in the central area of the page and click Print. Click 'Print'.
 - c. Hold down 'CTRL' and press 'P' on your keyboard. Click 'Print'.

10 TROUBLESHOOTING

10.1 Message Displayed: Alert description is required.

Scenario: I clicked 'Save' and received an error message that the alert description is required.

Solution: This error may appear if a user is performing an action, such as saving, and has a select box checked but the Case Alerts note is empty. Uncheck the Select box next to the empty text box, or enter the Case Alert note, then perform the action again.

10.2 All Alerts are missing from Case

Scenario: There were previously Case Alerts on a case but they suddenly disappeared.

Solution: This may happen if a user accidentally clicks the checkbox next to the 'Select' header, and then clicks the delete button. Clicking the top 'Select' box visibly selects all alerts.

10.3 No 'Add Alert, 'Delete, or 'Save' Button

Scenario: I am trying to modify a Case Alert but there is no 'Add Alert', 'Delete', or 'Save' buttons.

Solution: You are trying to modify a case that does not reside in your legal county. Users are able to view Case Alerts for cases that are not in their county, but do not have the ability to add, delete, or modify them.

<input type="checkbox"/> Select	Case Alerts	Last Updated By	Last Updated On
<input type="checkbox"/>	test 1	Landry, Raven	03/19/2014 03:19 PM
<input type="checkbox"/>	test2	Landry, Raven	03/19/2014 03:20 PM
<input type="checkbox"/>	Test from Terry - 1	Duperron, Terrence Patrick	03/25/2014 09:26 AM
<input type="checkbox"/>	Test from Terry - 2	Duperron, Terrence Patrick	03/25/2014 09:28 AM
<input type="checkbox"/>	Test from Terry - 3	Duperron, Terrence Patrick	03/25/2014 09:29 AM
<input type="checkbox"/>	test3	Landry, Raven	03/25/2014 09:32 AM

Figure 10-1