

# EIM Reference Guide – Working with Alerts in EIM

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## Overview of Alerts

Your work with incidents in EIM consists of actions you take and data you enter. The system also takes actions and processes the information entered. These system activities and responses may generate system alert messages to inform you of issues to be addressed and measures to take. These alert messages are displayed on the **Alerts** tab that appears in the Dashboard. A sample Alerts tabbed page on a Dashboard with alert messages is illustrated below.

**My Dashboard**

Work Items	Alerts	News	SC Comments
<input type="checkbox"/>	Date	Alert Detail	
<input type="checkbox"/>	04/24/2021	<a href="#">The First Section for Incident 91736 has not yet been submitted and requires action.</a>	
<input type="checkbox"/>	04/19/2021	<a href="#">The First Section for Incident 91535 has not yet been submitted and requires action.</a>	
<input type="checkbox"/>	04/19/2021	<a href="#">The First Section for Incident 91518 has not yet been submitted and requires action.</a>	
<input type="checkbox"/>	04/19/2021	<a href="#">The First Section for Incident 91521 has not yet been submitted and requires action.</a>	
		<a href="#">The First Section for Incident 91522 has not yet been submitted and requires action.</a>	

**DELETE**

## Working with Alerts

Click the Alerts tab in the Dashboard (bordered in red in the illustration above) to open the Alerts pane. A table in the pane displays the alerts that currently require your attention. These alerts are listed in reverse chronological order (most recent on top), based on the date that they were generated.

Each message appearing in the Alert Detail column of the table is a link, as shown in the detail illustration below. The arrow and highlighted text depicted indicate the link.

Read each message and determine the order in which you need to address your alerts. Click the link for the first alert to address, and the Incident Detail screen for the incident ID identified in the alert opens.

Date	Alert Detail
04/24/2021	<a href="#">The First Section for Incident 91736 has not yet been submitted and requires action.</a>

There are some alerts that notify users of specialized incident events. Such alerts are discussed in other areas of this manual, where these specialized events are covered.

The list of alerts in the table can be sorted and filtered, using the standard methods used elsewhere in tables in EIM.

## Deleting Alerts

All alerts are purged after either 14 or 120 days, depending on the alert. You can, however, delete alerts before they would otherwise expire. To purge an alert before its set time (see illustration below):

1. Check the check box that appears beside the date of the alert you want to remove.
2. Click the [Delete] button at the bottom of the Alert pane. The alert is immediately deleted.

Clicking the check box that appears as the column heading to the first column of the table and then clicking the [Delete] button erases all the alerts from the table.

The screenshot shows a dashboard titled "My Dashboard" with a navigation bar containing "Work Items", "Alerts", "News", and "SC Comments". The "Alerts" section is active, displaying a table with columns for "Date" and "Alert Detail". The table contains four rows of alerts. The first row has a date of "04/24/2021" and a detail: "The First Section for Incident 91736 has not yet been submitted and requires action." The other three rows have dates of "04/19/2021" and similar details. A red box highlights the checkbox in the first row. A callout box points to this checkbox with the text: "First, click to check the check box for the alert you want to delete." Another callout box points to a red "DELETE" button at the bottom of the alert pane with the text: "Next, click the [Delete] button. The alert is purged from the table and system."

	Date	Alert Detail
<input checked="" type="checkbox"/>	04/24/2021	The First Section for Incident 91736 has not yet been submitted and requires action.
<input type="checkbox"/>	04/19/2021	535 has not yet been submitted and requires
<input type="checkbox"/>	04/19/2021	The First Section for Incident 518 has not yet been submitted and requires action.
<input type="checkbox"/>	04/19/2021	itted and requires

## Understanding the Alerts

The table displayed on the next few pages contains the current complete list of EIM alerts used by ODP-ID/A. This list is sometimes called the Alerts Matrix.

## Alerts Matrix

Subject of Alert Text	Triggering Condition	Hyperlink To	Alert Recipient(s)	Email Alert	Expiration
First Section Submitted	First Section submitted	Incident Detail	Individual's Primary Supports Coordinator/ Supports Coordinator Supervisor	Yes	After 120 days
Final Section Submitted	Final Section submitted	Incident Detail	Individual's Primary Supports Coordinator/ Supports Coordinator Supervisor	Yes	After 120 days
Incident Report is Not Approved	Incident Management Review submitted where 'Not Approved' was selected as the Review Approval Status.	Incident Detail	Individual's Primary Supports Coordinator/ Supports Coordinator Supervisor  <u>OR</u> All users at the reporting organization with Point Person and Incident Reporter Roles. <b>Note:</b> EIM generates an alert to all Incident Reporters at the initiating organization when an Individual Incident report is not approved during county/regional management review.	No	After 14 days
A restraint incident report has been filed that requires follow-up action.	A restraint first section document has been submitted for an individual <b>with an MCI</b> , and at least one of the two conditions in boldface type below is met:  <b>'Yes' is selected in one or more of the following drop-down boxes on the <i>Restraint Information</i> screen:</b> <ul style="list-style-type: none"> <li>The individual has had more than 2 emergency restraints in the past 6 months</li> </ul>	Incident Detail	The individual's primary Supports Coordinator and Supports Coordinator's Supervisor within the assigned organization/scope.  <u>OR</u>	Yes	After 120 days

Subject of Alert Text	Triggering Condition	Hyperlink To	Alert Recipient(s)	Email Alert	Expiration
	<ul style="list-style-type: none"> <li>Was a prone (face down) position used during this Restraint?</li> <li>Was this an improper use of a restraint?</li> <li>Was this an unauthorized use of restraint?</li> </ul> <p><b>'No' is selected in the following drop-down box on the <i>Restraint Information</i> screen:</b></p> <ul style="list-style-type: none"> <li>Is there documentation that all staff involved were trained on the behavioral support plan that was in place at the time of the incident that included this restraint?</li> </ul> <p>A single alert is generated for each targeted recipient.</p>		AE/County staff	No	After 120 Days
A restraint incident report has been filed that requires follow-up action.	<p>A restraint first section document has been submitted for an individual <b>without an MCI</b>, and at least one of the two conditions in boldface type below is met:</p> <p><b>'Yes' is selected in one or more of the following drop-down boxes on the <i>Restraint Information</i> screen:</b></p> <ul style="list-style-type: none"> <li>The individual has had more than 2 emergency restraints in the past 6 months</li> <li>Was a prone (face down) position used during this Restraint?</li> <li>Was this an improper use of a restraint?</li> <li>Was this an unauthorized use of restraint?</li> </ul> <p><b>'No' is selected in the following drop-down box on the <i>Restraint Information</i> screen:</b></p> <ul style="list-style-type: none"> <li>Is there documentation that all staff involved were trained on the behavioral support plan that was in place at the time of the incident that included this restraint?</li> </ul> <p>A single alert is generated for each targeted recipient.</p>	Incident Detail	All users in the individual's Region with the PW-EIM-INCIDENTMGTREV role	No	After 120 days
A restraint incident report has been filed that requires follow-up action.	A restraint first section document has been submitted for an individual <b>with an MCI</b> where the value in the <i>Restraint Duration (minutes)</i> field is 31 minutes or more.	Incident Detail	The individual's primary Supports Coordinator and Supports Coordinator's Supervisor within the assigned organization/scope. (Individual Incidents only)	Yes	After 14 days

Subject of Alert Text	Triggering Condition	Hyperlink To	Alert Recipient(s)	Email Alert	Expiration
A restraint incident report has been filed that requires follow-up action.	A restraint first section document has been submitted for an individual <b>without an MCI</b> where the value in the <i>Restraint Duration (minutes)</i> field is 31 minutes or more.	Incident Detail	Regional Staff	No	After 120 days
The Initial County Management Review has been submitted with comments that may require action.	At least one of the following two drop-down boxes contains a 'No' response: <ul style="list-style-type: none"> <li>• Were the actions taken to protect the individual's health, safety and rights prompt and adequate?</li> <li>• Were the actions taken to protect the individual's health, safety and rights documented?</li> </ul>	Incident Detail	Reporting organization users with an Incident Point Person and/or Incident Report Role	No	After 14 days
The Initial Regional Management Review has been submitted with comments that may require action.	At least one of the following two drop-down boxes contains a 'No' response: <ul style="list-style-type: none"> <li>• Were the actions taken to protect the individual's health, safety and rights prompt and adequate?</li> <li>• Were the actions taken to protect the individual's health, safety and rights documented?</li> </ul>	Incident Detail	Reporting organization users with an Incident Point Person and/or Incident Report Role	No	After 14 days

Subject of Alert Text	Triggering Condition	Hyperlink To	Alert Recipient(s)	Email Alert	Expiration
<p>The Initial Regional Management Review findings disagree with the Initial County Management Review Findings</p>	<p>The Initial County Management Review is submitted with the selection of 'Yes' on one or both of the questions below and the Initial Regional Management Review is submitted with the selection of 'No' on one or both of the corresponding questions:</p> <ul style="list-style-type: none"> <li>• Were the actions taken to protect the individual's health, safety and rights prompt and adequate?</li> <li>• Were the actions taken to protect the individual's health, safety and rights documented?</li> </ul>	<p>Incident Detail - Initial Regional Management Review</p>	<p>Individual's AE/Funding County with the Incident Management Reviewer role</p>	<p>No</p>	<p>After 14 days</p>
<p>The First Section for &lt;Incident ID&gt; has not yet been submitted and requires action.</p>	<p>When an incident is created, and the Incident First Section is not submitted within 72 hours of creation.</p>	<p>Incident Detail</p>	<p>All users with the PW-EIM-INCIDENTRPTR role in the reporting organization as well as the assigned Point Person for the incident.</p>	<p>No</p>	<p>After 14 days</p>

Subject of Alert Text	Triggering Condition	Hyperlink To	Alert Recipient(s)	Email Alert	Expiration
<p>A medication error report has been filed that requires follow-up action.</p>	<p>A medication error first section document has been submitted and at least one of the following two conditions is met:</p> <ul style="list-style-type: none"> <li>• Secondary Category <b>Wrong Person - Gave person someone else's medication</b> is selected</li> <li>• <b>Yes</b> is selected as the response to <i>Did the error occur over multiple consecutive administrations?</i></li> </ul> <p>And the following condition is met:</p> <ul style="list-style-type: none"> <li>• A Medication Error incident submitted is not linked to an incident classified as Neglect within 24 hours</li> </ul>	<p>Incident Detail</p>	<p>All SCE users in the individual's SCE</p> <p>Individual's AE/funding county and regional staff with the Incident Management Reviewer role (regional staff alerted only if individual has no MCI)</p> <p>Only one alert is received for two linked incidents.</p>	<p>Yes</p>	<p>After 120 days</p>
<p>Comments have been addressed as part of the Management Review</p>	<p>An SC Comment is addressed by a Management Reviewer, and the Management Review is submitted</p>	<p>Incident Detail</p>	<p>Individual's SC and SC Supervisor in the assigned organization</p> <p>The individual's primary Supports Coordinator and Supports Coordinator's Supervisor within the assigned organization/scope. (Individual Incidents only)</p>	<p>Yes</p>	<p>After 14 days</p>



## Receiving Email Alerts

Supports Coordinators (SC) and/or Supports Coordinator Supervisors receive email alerts generated by EIM for individuals on their caseload. Email alerts are generated in real-time when EIM produces a system alert for the SC or SC Supervisor. The emails are generated for the alerts listed in the Alerts Matrix with **Yes** in the Email Alert column of the table.

The user receiving the alert must be assigned to an SC Supervisor in HCSIS in order for the email alert to be generated for the incident. Users should ensure that their email addresses are listed correctly in Identity Manager in order to receive these email alerts. Illustrated below is an example of the email template:

<b>NoReply@pa.gov</b> to PCGSCENTCI ▾	Wed, Apr 28, 10:20 AM (22 hours ago)
<b><u>New EIM Alert</u></b>	
Incident ID: <a href="#">92028</a> , First Section is Submitted for an individual assigned to your caseload or SC you supervise.	
Primary Category: Medication Error	
Secondary Category: Wrong Person - Gave person someone else's medication	
Please login to the application <a href="#">here</a> to view this alert in EIM.	