

BAS Regional Staff and Supports Coordination Agencies Alerts Tip Sheet

An alert is an electronic message automatically generated in HCSIS to inform the user of an event that occurred or did not occur as expected within the system. Alerts may be used for informational, reminder or escalation purposes. Some alerts, called Smart Alerts, contain hyperlinks to take you to the appropriate HCSIS screen to perform the required action, while others convey only textual information. Tasks in this tip sheet can be performed by the following roles:

- BAS Statewide Administrator
- BAS Regional Administrator
- AAW Supports Coordination Supervisor
- AAW Support Coordinator

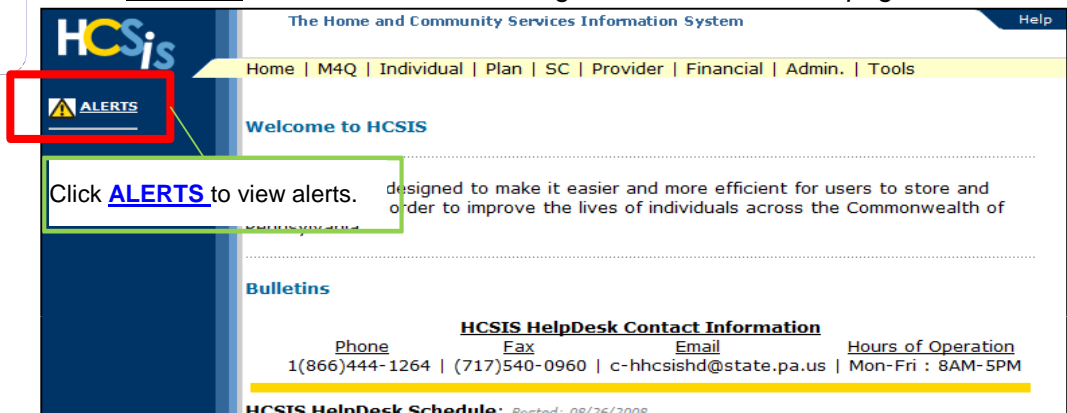
Viewing Alerts in HCSIS

1 Login to HCSIS

Open Internet Explorer and type the link below into the address bar, click the HCSIS Login link and enter your Username and Password to login to HCSIS.
<https://www.hcsis.state.pa.us/>

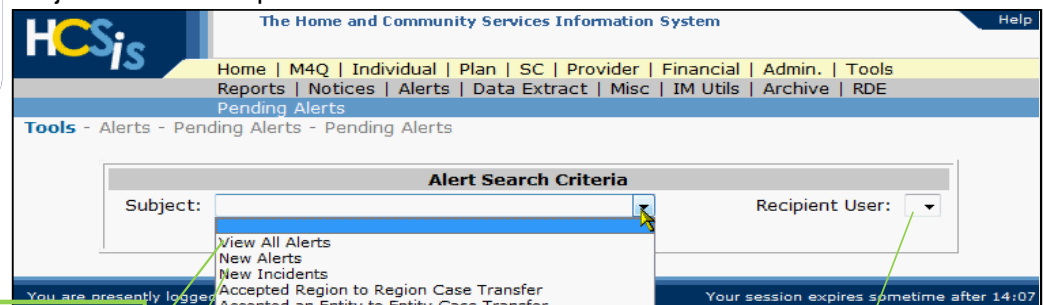
2 Click ALERTS

Click ALERTS underneath the HCSIS logo on the *HCSIS Homepage*.



3 Click the **Subject** drop-down menu to choose alert type

From the *Alert Search Criteria* page, select **View All Alerts**, **New Alerts**, or a specific subject from the drop-down list.



Access all alerts by selecting **View All Alerts**.

Access new alerts by selecting **New Alerts**.

Access specific alerts by selecting the desired alert subject.

Search for alerts for a specific user by selecting the **Recipient User** from the drop-down list. An SC Supervisor can see the alerts for their SCs. If your role is not authorized to view other user's alerts, this list will remain unpopulated.

4 The alert search results are displayed

The Home and Community Services Information System

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Pending Alerts

Tools - Alerts - Pending Alerts - Pending Alerts

Alert Search Criteria

Subject: Recipient User:

Reset Search

Your search found multiple matches. Please select the desired Alert.

Go To: Page 4 Go

Select	Date of Alert	Alert Subject	Alert Message
<input type="checkbox"/>	4/1/2009	Annual Review Date Alert	Annual Review Date Alert: Consumer Name: AUTISMISP, GAAAUTISMISP
<input type="checkbox"/>	4/1/2009	Annual Review Date Alert	Annual Review Date Alert: C
<input type="checkbox"/>	3/26/2009	Case Transfer Initiated to an alternate Region	An individual is being transfe Consumer Name: SATDMWAL 187854, MCI #: 530328081, Organization: CENTRAL, Sending SC Entity: , Receiving Organization: WEST, Receiving SC Entity:
<input type="checkbox"/>	3/24/2009	Closure Initiated	<u>A Case closure has been initiated</u> : Consumer Name: SMITH, PAUL, Consumer ID: 179179Closure Reason: , , Effective Date: 1/25/2009
<input type="checkbox"/>	3/23/2009	Accepted Region to Region Case Transfer	Region to Region transfer for an Individual has been Accepted: Consumer Name: SATDMWALAUTISMAB, DCAREGIONTRANS, Consumer ID: 187729, MCI #: 530327971, Transfer Effective Date: 3/23/2009, Sending Organization: CENTRAL, Sending SC Entity: , Receiving Organization: WEST, Receiving SC Entity:
<input type="checkbox"/>	3/19/2009	Case Transfer Initiated to alternate SC Entity	An Individual is being transferred from one SC Entity to another SC Entity: Consumer Name: SMITH, TESTSATRNDTWO, Consumer ID: 179477, MCI #: 310319755, Transfer Effective Date: 3/19/2009, Sending Organization: CENTRAL, Sending SC Entity: TT_SAT TEST ENTITY 4, Receiving Organization: SAT TEST ENTITY 1, Receiving SC Entity:
<input type="checkbox"/>	3/19/2009	Case Transfer Initiated to an alternate Region	An individual is being transferred from one Region to another Region: Consumer Name: SMITH, DANIEL, Consumer ID: 179229, MCI #: 290320634, Transfer Effective Date: 3/19/2009, Sending Organization: SOUTHEAST, Sending SC Entity: , Receiving Organization: CENTRAL, Receiving SC Entity:

Delete

You are presently logged into HCSIS Wednesday, April 01, 2009 11:58 Your session expires sometime after 12:23

The **Date of Alert** displays the date the alert was created. The alert will be automatically deleted 14 days after this date.

To navigate between pages of alerts, click the **Go To:** drop-down menu, then click [Go].

The **Alert Message** identifies specific details regarding the alert

To delete an alert, select the checkbox, then click [Delete].

Smart Alert vs. FYI Alert

Smart Alerts are alerts that require an action and contain a hyperlink that link to the relevant screen in HCSIS to perform that action. The **Closure Initiated** alert is a smart alert. Clicking on the underlined link will take you to the appropriate screen in HCSIS to close the individual's case.

FYI Alerts are informational and do not have an associated action. The **Accepted Region to Region Case Transfer** alert is an FYI alert. There is no action required from the user, this alert simply tells them the individual's case transfer is complete.

Closure Initiated	<u>A Case closure has been initiated</u> : Consumer Name: SMITH, PAUL, Consumer ID: 179179Closure Reason: , , Effective Date: 1/25/2009
Accepted Region to Region Case Transfer	Region to Region transfer for an Individual has been Accepted: Consumer Name: SATDMWALAUTISMAB, DCAREGIONTRANS, Consumer ID: 187729, MCI #: 530327971, Transfer Effective Date: 3/23/2009, Sending Organization: CENTRAL, Sending SC Entity: , Receiving Organization: WEST, Receiving SC Entity:

Below is a list of alert types, action items, and alert destinations.

Alert Types

Individual Alerts

Plan Submitted but Baseline Outcomes are Incomplete

The SC has submitted the final plan but the Baseline Outcomes assessment is incomplete. A Smart Alert is sent to the BAS Statewide Administrator, Regional Administrator, SC and the SC Supervisor.

LOC Reassessment

The annual Level of Care re-assessment will be due in 60 days. The alert is sent 60 days prior to the re-certification due date. The SC must complete and record the LOC re-assessment outcome. A Smart Alert is sent to the BAS Statewide Administrator, Regional Administrator, SC and SC Supervisor.

Closure Initiated

The case closure process has been initiated for an individual's record. A Smart Alert is sent to the BAS Statewide Reviewer, Statewide Administrator, Regional Reviewer, and Regional Administrator.

Shared Consumer Demographics

A shared consumer's demographic or Alternate ID information has been changed or removed by another program office. An Informational Alert is sent to the BAS Statewide Administrator, Regional Administrator, SC and SC Supervisor.

Plan Alerts

Plan Must be Created within 15 Days

The plan creation deadline is within 15 days. The SC must submit the draft plan in HCSIS. A Smart Alert is sent to the SC.

Final Plan must be Submitted within 15 Days

The final plan must be submitted for review within 15 days. The SC must finalize the plan and submit it in HCSIS. A Smart Alert is sent to the SC.

Plan Submitted for Review

The SC has submitted a plan to be reviewed by the SC Supervisor. The SC Supervisor should review the plan then it submit it for approval to the BAS Regional Administrator. A Smart Alert is sent to the SC Supervisor.

Plan Submitted for Approval

The SC Supervisor has submitted the final plan in HCSIS and is awaiting approval. The BAS Regional Administrator must approve the plan. A Smart Alert is sent to the BAS Regional Administrator.

Plan Sent Back for Revision

The submitted plan is rejected by BAS and is sent back to the SC for revisions. The SC must make the revisions and submit again for approval. A Smart Alert is sent to the SC and SC Supervisor.

Below is a list of alert types, action items, and alert destinations

Alert Types

Plan Alerts (continued)

Projected Annual Review Date

The annual review must be performed within 30 days of the alert. The SC must perform the yearly assessments and review/revise the individual's plan before the Projected Annual Review date. A Smart Alert is sent to the BAS Statewide Administrator, Regional Administrator, SC, and SC Supervisor.

Service Authorized

A service on an individual's plan have been authorized and can now be utilized. A Smart Alert is sent to the SC.

Assignment Alerts

Individual Pending Assignment to SC Caseload

The individual chooses an SC and their case is assigned to the SC Entity by BAS. The SC Supervisor must accept the assignment in order to be able to view the individual's record into their organization and assign it to the proper SC. A Smart Alert is sent to the SC Supervisor.

Individual Added to Caseload

The individual/family chooses an SC and the individual is added to a SC caseload by the SC Supervisor. The SC is now responsible for the individual. An Informational Alert is sent to the SC and SC Supervisor.

Transfer Alerts

Case Transfer Initiated to an Alternate SC Entity

A case transfer from one SC Entity to another SC Entity has been initiated. The receiving SC entity must accept or reject the transfer. An Informational Alert is sent to the BAS Regional Reviewer, Regional Administrator and SC Supervisor.

Case Transfer Initiated to an Alternate Region

A case transfer from one region to another region has been initiated. The receiving region must accept or reject the transfer. An Informational Alert is sent to the BAS Regional Reviewer and Regional Administrator of the receiving region.

Accepted Case Transfer

An SC Entity to SC Entity transfer or Region to Region transfer for an individual has been accepted. In both cases, an Informational Alert is sent to the BAS Regional Reviewer and the Regional Administrator. For SC Entity to SC Entity transfers, the SC Supervisor will also receive the Informational Alert.

Referback Case Transfer

An SC Entity to SC Entity transfer or Region to Region transfer for an individual has been referred back to original organization. In either case, an Informational Alert is sent to the BAS Regional Reviewer and the Regional Administrator. For SC Entity to SC Entity Referback, the SC Supervisor will also receive the Informational Alert.