

Process Alerts Rules [.2215 and previous]

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Process Alert rules determine when Process Alert messages are sent. Message templates must be created on the Messages tab before establishing rules.

If a message is to be sent more than once for the same alert, multiple rules must be established for the alert (e.g., a rule to notify two weeks prior to the event and a separate rule to notify one week prior to the event). A single message may be used by multiple rules.

Messages	Rules	Scheduler				
Save	😣 Delete	+ New Rule				
Messenger	Rule List					
Subject			Message		Created Date	Status
18th Birthda	y Rule		Student Birthday	/s	04/11/2014	active
6th Birthday			Student Birthday	/s	04/11/2014	active
Plan End Dat			Plan End Date		04/11/2014	active
Release Day	Message		Release Day		04/11/2014	
Rule Detail	*Rule Nar				Message Temp	late
active	Plan End	Date		Plan End Date	-	
Special Con Days Before 30	nditions #/After Event Du Calendar Days		Event 1 Plan End Date * The alert checks the abov	and	vent 2 The above is due	▼
		Image	1: Process Alerts Rules e	ditor		

Process Alerts Rules Editor

The following options are available.

Rule Detail

Field	Description
Active	Selection indicates the rule is currently active.
Rule Name	Name of the rule.
Associated Message Template	Template from the Messages tool assigned to the rule.

Special Conditions

Field	Description
Days Before/After Event Due	Number of days before or after when the message should be sent.
Count Option	Entered number above is based on either School Days or Calendar Days.
Before/After Logic	If the message related to the rule is to be sent BEFORE an event, select the "Before" option. If the message is to be sent AFTER an event, select the "After" option.
	When After is selected, the message will be sent after the EXACT amount of specified days have passed. This means that if an event occurred 11 days prior to the start date of the scheduled alert and the message is set to send 10 days after the event, the case manager will NOT receive an alert for that event.
Event 1	Selection indicates the event to which the before/after selection applies. See the list of Event Options available.
Event 2	Selection indicates the event to which the before/after selection applies. See the list of Events Options available.

Event Options

The values for Event 2 are dependent on the Event 1 selection.

Event 1 Options	Event 2 Options
Age 10 Birthday	Not applicable

Event 1 Options	Event 2 Options
Age 14 Birthday	Not applicable
Age 18 Birthday	Not applicable
Age 21 Birthday	Not applicable
Age 3 Birthday	Not applicable
Age 6 Birthday	Not applicable
Age 7 Birthday for Developmentally Delayed	Not applicable
Age 9 Birthday	Not applicable
Previous Evaluation + 3 years	New Evaluation (3 year)
Evaluation Consent Date	Evaluation Date OREvaluation - Determination Date
Evaluation - Determination Date	Not applicable
Evaluation Date	Plan Start Date
Plan End Date	Locked IEP Starting
Plan Start Date	Not applicable
Progress Report Date	Not applicable
Term End Date	Progress Report Due
Today	Not applicable

Create Process Alerts

Rule Detail

- 1. Select the **New Rule** icon.
- 2. Mark the **Active** checkbox.
- 3. Enter the name of the rule in the **Rule Name** field.
- 4. Select the message template to which the rule should be applied. The message template must have been created on the Messages tab to appear in this list.

Special Conditions

- 1. Enter the number of **Days Before/After Event Due**.
- 2. Select the option of whether to count by **School Days** or **Calendar Days**.



- 3. Select the **Before** or **After** option from the dropdown list.
- Select the event for which this rule applies and the before/after logic is applied in the Event 1 dropdown.
- 5. If applicable, select the event before which the message should be sent from the **Event 2** dropdown list. This dropdown list is populated based on the event selected from the Event 1 dropdown list.
- 6. When finished, select the **Save** icon.

After establishing rules, user the Scheduler tab to set when the messages should be sent.

If a message is to be sent more than once for the same alert, multiple rules must be established for the alert (e.g., a rule to notify two weeks prior to the event and a separate rule to notify one week prior to the event). A single message may be used by multiple rules.

Create Multiple Alerts for a Message

Multiple rules may be set to remind case managers of the same event. For example, if case managers can be reminded of upcoming triennial evaluation two weeks in advance and again one day in advance if the evaluation still has not been created.

8th Birthday Rule	Student Birthdays	04/11/2014	active
6th Birthday Rules	Student Birthdays	04/11/2014	active
Plan End Date - Month	Plan End Date	04/11/2014	active
Plan End Date - Week	Plan End Date	04/11/2014	active
Release Day Message	Release Day	04/11/2014	

Image 2: Process Alerts Rulers - Multiple Alerts

Examples of Process Alert Rules and Conditions

The following is a list of sample rules that can be created.

Age Rules

Rules may be set to remind case managers of students' upcoming birthdays (ages 3, 6 and 18) when the case manager is required to perform an action.

Rule Detai	Rule Name			*Associate	ed Message Template
active	18th Birthday Rule			Student Bi	
Special Co Days Befor	onditions re/After Event Due	_	Event 1	_	Event 2
2	Calendar Days 👻	Before 👻	Age 18 Birthday	and	
			* The alert checks the above date.		* The above is due.

Annual IEP Due

Rules may be set to remind case managers of expiring IEPs and indicate that a new locked IEP will be needed.

Exceeded Days

Rules may be set to remind case managers if they have exceeded a certain number of days between receiving consent to evaluate and evaluation determination, as necessary for completion of special education documents.

active	*Rule Name Exceeded 14 days between consent a					sociated Message Template ceeded Days	
Special Condi Days Before/A	itions Ifter Event Due			Event 1		Event 2	
15 Ca	lendar Days 👻 After 👻		•	Evaluation - Consent Date 🔹 🗧		Evaluation - Determination Date 👻	
			4	* The alert checks the above date.		* The above is due.	

Locked IEP

Rules may be set to remind special education case managers when a locked IEP will be due for a student (after an evaluation has been locked and saved).

Rule Detail	*Rule Name			*/	Associate	d Message Template
active	Locked IEP Due in	10 days			ocked IEP	
Special Cor	ditione					
	After Event Due		Event	1	_	Event 2
10	Calendar Days 👻	Before 👻	Evalu	ation Date 🗸 🗸	and	Plan Start Date 👻
			* The a	alert checks the above date.		* The above is due.

Progress Report

Rules may be set to remind special education case managers when a progress report will be due for a student (as the term nears its end).

active	*Rule Name Progress Report due	in 7 days		*Associated Message Template Progress Report Due 👻		
	itions ⊾ <mark>fter Event Due</mark> Calendar Days 👻	Before 👻	Event 1 Term End Date	- and	Event 2 Progress Report Due 👻	
			* The alert checks the above date.		* The above is due.	

Evaluation Due

Rules may be set to remind special education case managers that an evaluation will be due for a student.

Rule Detail	*Rule Name Evaluation Due			ed Message Template	
Special Co Days Befor 7	nditions e/After Event Due Calendar Days 👻	Before 👻	Event 1 Previous Evaluation + 3 Years * The alert checks the above d		Event 2 New Evaluation (3 year) ★ The above is due.
_		Imag	ge 8: Evaluation Due		