CDPH California Department of Public Health

CalREDIE California Reportable Disease Information Exchange

CalREDIE Alerts

User Guide

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CalREDIE
California Department of Public Health

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Section 1: Background Information

CalREDIE Alerts, formerly known as ARNOLD Alerts, is the built-in event notification component of CalREDIE. The Alerts module allows users to sign up to receive email alerts for incidents and outbreaks that have been entered or updated in CalREDIE.

There are two major steps to setting up CalREDIE Alerts. The ***Event Subscription*** is used to select the conditions for which alerts are sent. The ***Contact Method*** is used to specify the email address alerts are sent to, as well as the days and times that alerts are sent. Other components of Alerts include the ability for email alerts to be sent to another address if the email alert is not acknowledged within a certain timeframe, and the ability to forward all alerts for a given date range to a different email address.

This document provides step-by-step instructions for subscribing to CalREDIE email alerts. To begin using Alerts, users must first set up the ***Notification Priority*** and ***Contact Method***. When these two items are complete, users can then use the ***Event Subscription*** to select the email alerts they wish to receive.

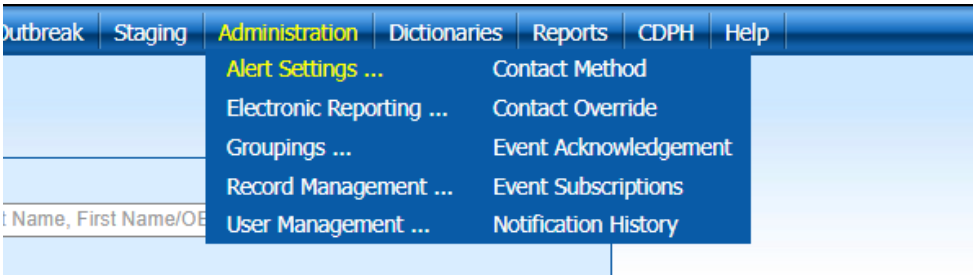
For several of the steps, users are required to name certain elements with a unique name that does not already exist in the Alerts system. To ensure that all names are unique, naming conventions have been developed. **Please follow all naming conventions exactly as described.** As always, CalREDIE Help can answer any questions related to the Alerts tool or to the CalREDIE system generally.

Section 2: Accessing CalREDIE Alerts

From within the CalREDIE system, Alerts can be accessed by navigating to Administration > Alert Settings. There are five items in the submenu:

1. Contact Method
2. Contact Override
3. Event Acknowledgement
4. Event Subscriptions
5. Notification History

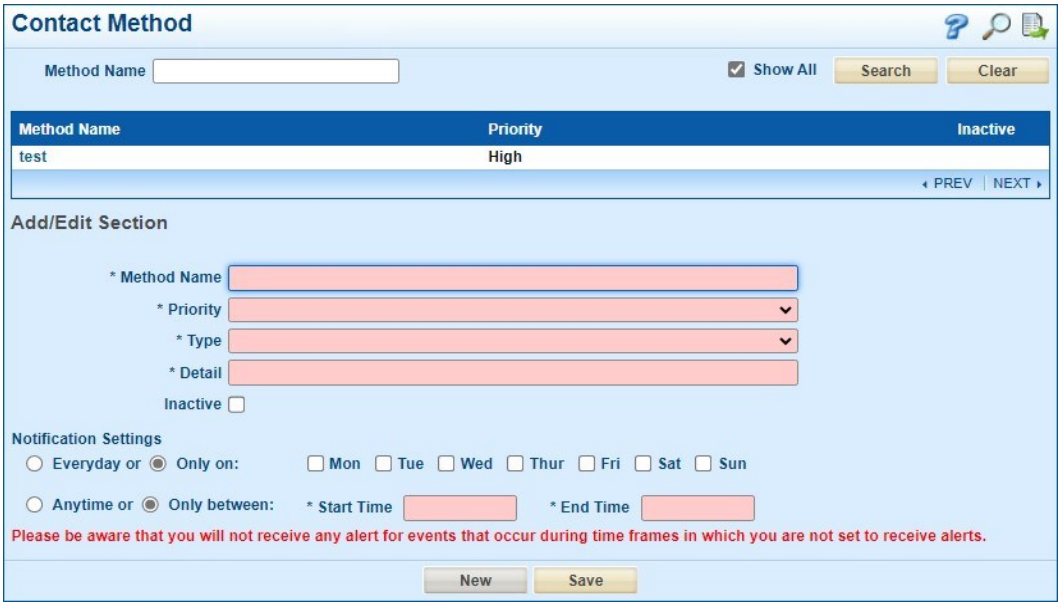
Figure 1: Items in the Alert Settings menu



Section 3: Contact Method

The Contact Method specifies the email account that alerts will be sent to, as well as the days and times that alerts will be sent. The Contact Method is tied to a Notification Priority.

Figure 2: Contact Method



To set up a Contact Method (Figure 2):

1. Select ***Contact Method*** from the Alert Settings submenu.
2. Click ***New*** to set up a new method.
3. Enter a ***Method Name*** using the following format: **Username – XXXX**, where XXXX is the type of email address.
    a. For example, *RSmith – Work* might be the Method Name for Richard Smith's work email.
4. Select a ***Method Priority*** from the dropdown. The options here are Low, Medium and High. These will be explained below.
5. Select "Email" as the ***Method Type***.
    a. Note that the "Phone" and "Text" methods are not configured and will not work.
6. Enter the email address in the ***Method Detail*** field.
7. Select the days you wish to be notified about events via this contact method. You may select ***Everyday*** or select individual days.
8. Select the times you wish to be notified about events via this contact method. You may select ***Anytime*** or specify certain times.
9. Click ***Save***.

*Please keep in mind that users will only receive alerts during the selected days/times for events that **occur** during the selected days and times. For example, you cannot configure Alerts to send messages only during business hours and have all weekend alerts sent Monday morning at 8AM. If you configure Alerts to only send messages during business hours, events outside of those hours will not prompt an alert.*

What are the Priority levels?

Events can be categorized as either High, Medium, or Low priority. Essentially, the difference between the three will be in the frequency of recurring notifications, and the escalation criteria if the event is not acknowledged. But this is entirely user-configurable: by default, there's no built-in difference between these three priority levels.

Section 4: Event Subscription

The Event Subscription, which is tied to the Notification Priority, is where users choose the instances for which they wish to receive an alert. The following alerts are available for each disease and outbreak:

- **New Record** – a new incident or outbreak is created.
- **Update Record** – a change has been made to the incident or outbreak.
- **EFC Update** – the electronic filing cabinet has been modified.
- **Process Status Change** – you may choose statuses to be alerted about.
- **Resolution Status Change** – you may choose statuses to be alerted about.
- **Staging** – a new lab or web report is in the Disease Incident Staging Area (DISA)
- **All** – any of the events above will trigger an alert.

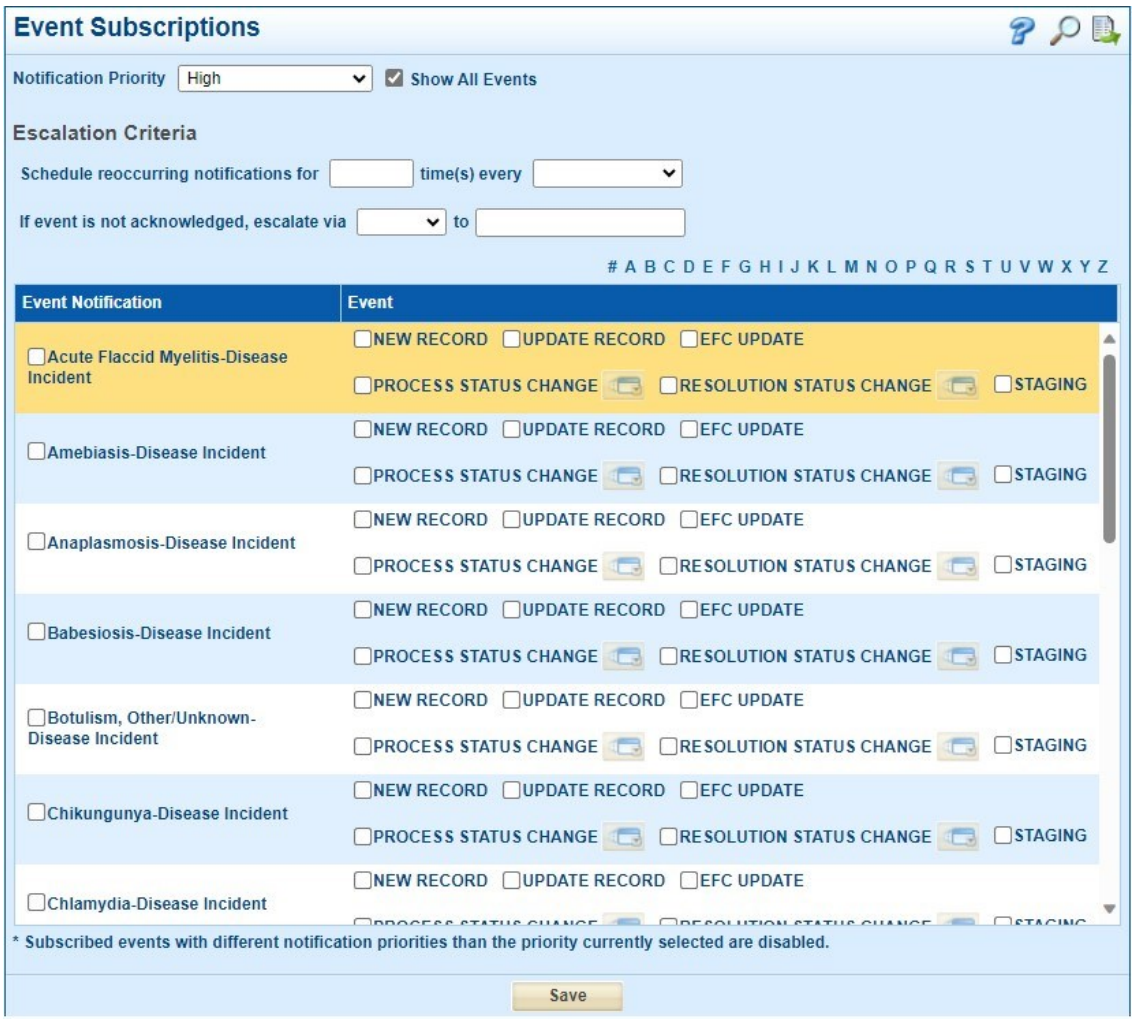
To set up an Event Subscription (Figure 3):

1. Select ***Event Subscriptions*** from the Alert Settings submenu.
2. Select a ***Notification Priority***.
    a. The Priority(s) you see in the dropdown are the priorities that have been tied to a Contact Method. If you have only set up one Contact Method, using the *High* priority, you will only see *High* in this dropdown.
3. Check the ***Show All Events*** checkbox.
    a. By default, you will only see events to which you are already subscribed.

Checking the box will display a list of events to which you may subscribe. These events are typically incidents or outbreaks of a specific disease condition.

4. Skip the ***Escalation Criteria*** section. This topic is covered below in Section X.
5. Use the scrollbar, or click the alphabetical legend, to search for the event you wish to subscribe to.
6. Once you identify the correct event, use the checkboxes to select the types of alerts you wish to receive. To receive all alerts for a disease or outbreak, check the box next to the event name. To specify individual alert types, use the checkboxes to the right of the event name.
    a. To specify alerts for individual Process or Resolution Statuses, the Event Subscription must be saved first, and you must have opted to receive that type of alert (or must have selected All).
7. Click ***Save***.

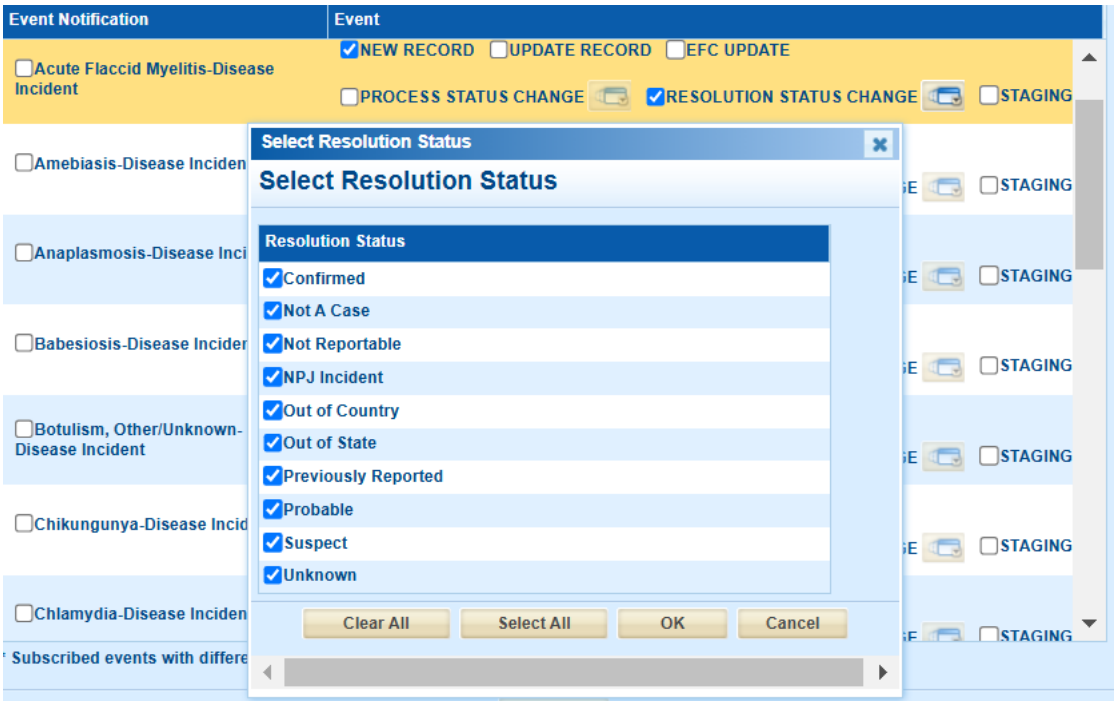
Figure 3: The Event Subscription page



To select individual Process or Resolution Statuses (Figure 4):

1. Click the corresponding button next to that alert option.
2. Select the statuses you wish to receive alerts for from the pop-up.
    a. You will be alerted when an incident/outbreak is set ***to*** that status, not ***from*** that status.
3. Click ***OK***. You will receive a message that the subscriptions have been saved.
4. Click ***Save*** to save all changes.

Figure 4: Selecting individual statuses



Section 5: Escalating and Acknowledging Alerts

It is possible for CalREDIE to send multiple email alerts for a single instance of an event: this is called a *reoccurring notification*. If a user does not acknowledge these alerts, it is also possible for CalREDIE to send an alert to a different email address, what we call an *escalation*.

To set up reoccurring notifications and escalation (Figure 5):

1. Click on ***Event Subscriptions*** on the left-hand side of the screen.

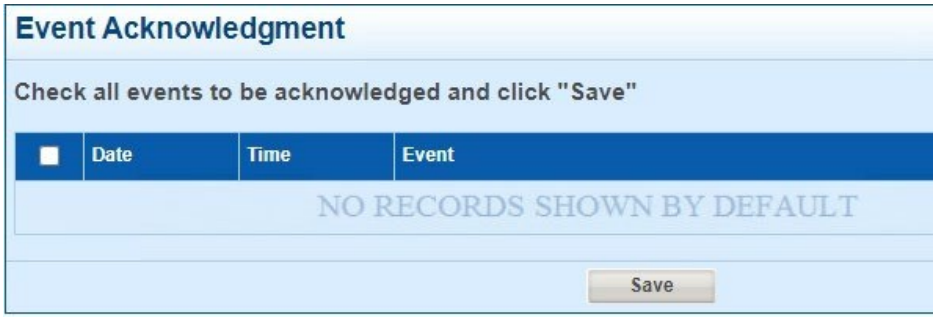
2. Select the ***Notification Priority*** for which you wish to schedule the reoccurring notifications and escalations. Note that the changes you make will apply to **all events that use that priority level.**
3. Enter a number for the number of reoccurring notifications.
4. Select how often the notifications should be sent from the dropdown.
    a. For example, if you choose to send *four* recurring notifications every *15* minutes, you will be alerted four times over an hour to your original contact method.
5. To escalate the event, select “Email” from the dropdown.
6. Enter the escalation email address.
    a. Continuing with our example above, if the alert goes unacknowledged after those four notifications, a final alert will be sent to the email address you enter here. In most cases, this should be a colleague or supervisor who is responsible for handling these events in the case that you are unavailable.
7. Click ***Save***.

Figure 5: Reoccurring notifications and escalation

To acknowledge an alert (Figure 6):

1. Select ***Event Acknowledgement*** from the Alert Settings submenu.
2. All alerts to be acknowledged will appear in the grid. Use the checkbox to acknowledge each alert.
3. If there are multiple alerts to acknowledge, use the ***Check All*** button.
4. Click ***Save***.

Figure 6: The Event Acknowledgement page



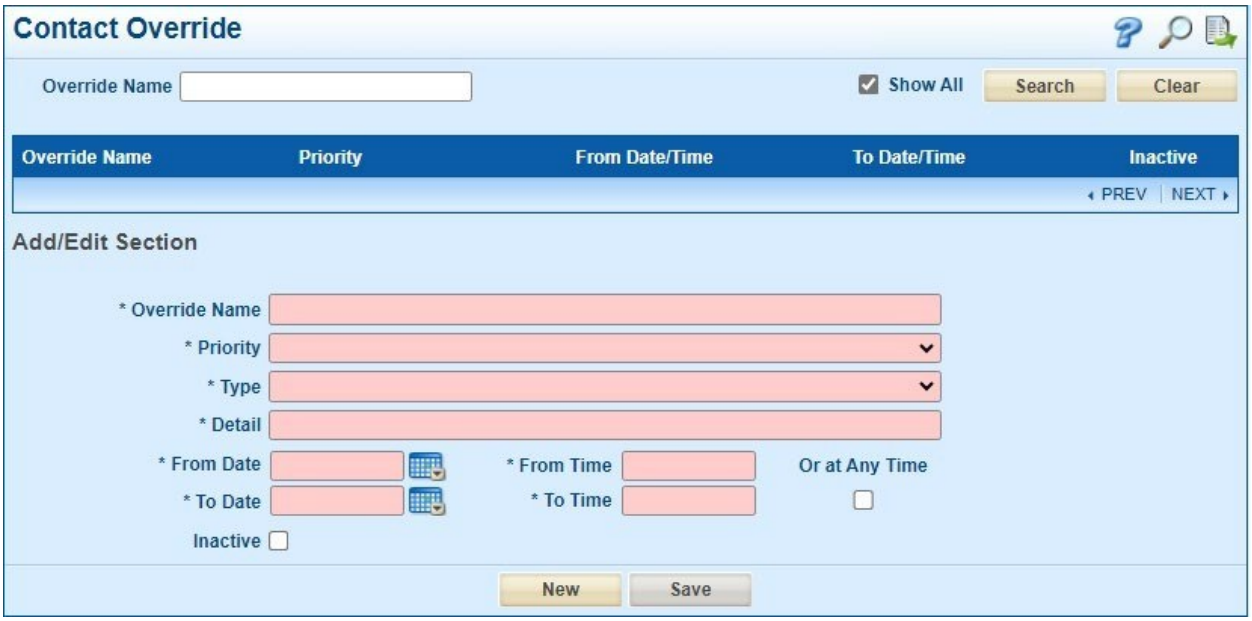
Section 6: Overriding Alerts

It is possible to forward alerts to a different email address for a given period. This is done by creating a Contact Override.

To set up a Contact Override (Figure 7):

1. Select ***Contact Overrides*** from the Alert Settings submenu.
2. Click ***New*** to start a new override.
3. Enter an ***Override Name*** using the following format: **Username – XXXX**, where XXXX is the reason for the override.
    a. For example, *RSmith – Vacation* might be Richard Smith's override when he's on vacation.
4. Select the ***Override Priority*** from the dropdown. Your override will apply to events with that priority only. You will need to create a separate override for every priority level you use, as appropriate.
5. Select "Email" as the ***Override Type***.
    a. Recall that other contact methods do not work.
6. Enter an email address in the ***Override Detail*** field.
7. Enter the ***From*** and ***To*** dates of the override.
8. Select the times for the override or click ***Or At Any Time***.
9. Click ***Save***.

Figure 7: The Contact Override page



Section 7: Notification History

The Notification History allows users to see a list of all sent alerts and allows users search for sent alerts in a certain timeframe. This is also a good way to troubleshoot any issues you note with CalREDIE Alerts.

To view the Notification History (Figure 8):

1. Select ***Notification History*** from the Alert Settings submenu.
2. If desired, enter a date range in the ***From*** and ***To*** fields.
3. You may also indicate a ***Status*** if you wish to look for specifically Failed, or Succeeded, messages.
4. Use the ***Subject*** field to enter information from the event name if you wish to narrow down your search.
5. If you have alerts going to multiple email addresses, you may use the ***Method Detail*** field to enter the specific email address you are looking for.
6. Click ***Search***.
7. Use the number ranges at the bottom of the screen to navigate through the results.

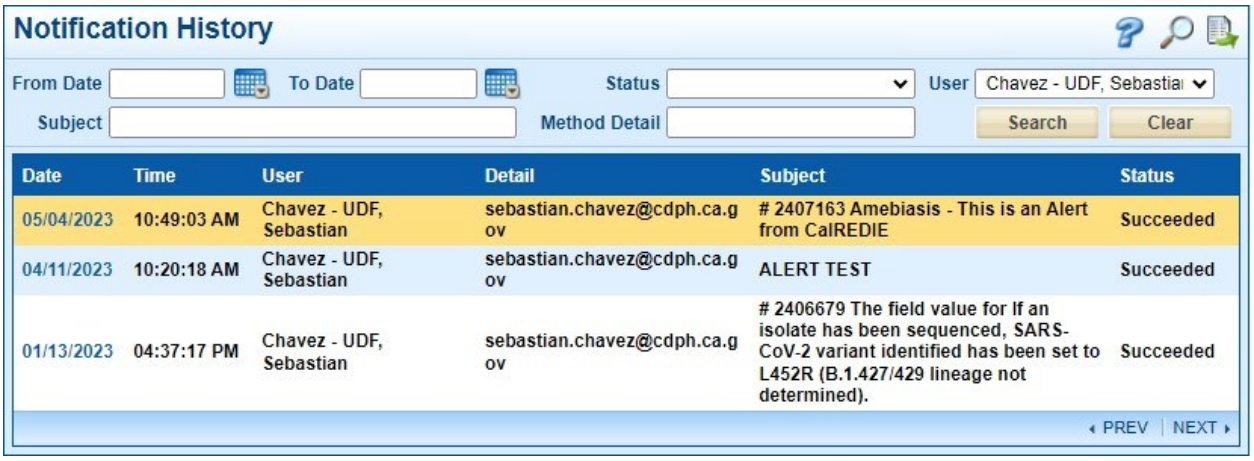



Figure 8: The Notification History page