

Patient Alerts are a powerful tool to use in your practice to quickly add an alert for an individual patient or a batch of patients at the same time from the Finder Tool.

ALERT TYPE	ALERT APPEARS WHEN
<b>Appointment</b>	Adding / editing an appointment and when adding a prescription refill request
<b>Account</b>	Adding a charge or payment for a patient and in Patient Accounts
<b>Consultation</b>	In the patient's consultation
<b>Prescription</b>	User is printing a prescription

## 1. Patient Alert

Open Patient Registration e.g. from [Patient Maintenance > Open Patient](#). Search for the patient and click the **Alerts** tab.



Select the **alert type** from the left-hand side i.e. Appointment, Account, Consultation or Prescription.



Select the Category, Severity and enter details of the alert.

The screenshot shows the 'Appointment Alert' configuration form. On the left, there is a vertical menu with 'Appointment' selected. The main form area has the following fields:

- Type: Appointment
- Date: 27/05/2025
- Category: CDM
- Severity: Medium
- Details: Please ask patient to book an appointment before adding any prescription refill request.

At the bottom right, there are 'Save' and 'Clear' buttons.

**Example:**

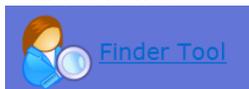
Appointment Alert: When adding a prescription refill [*Prescriptions > Refill Request*] or adding an appointment this alert will be displayed.



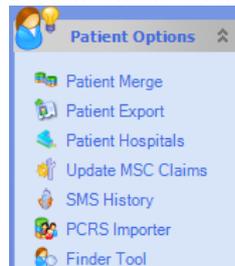
## 2. Group Patient Alert

Navigate to: [Patient Maintenance > Finder Tool](#) or [Control Panel > Finder Tool](#)

**Control Panel**



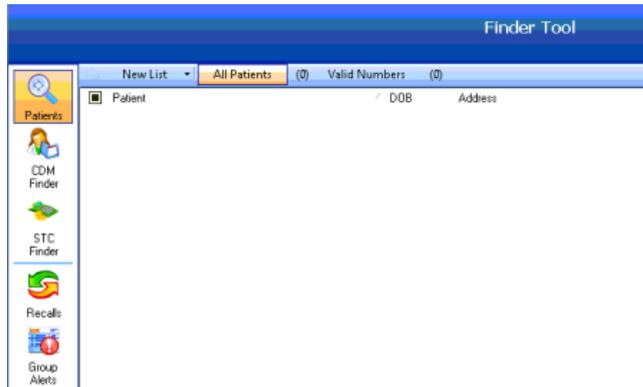
**Patient Maintenance**



Click Patients, CDM Finder or Recalls depending on which criteria you want to use. Read the Finder Tool quick guides for more details.

E.g. Find all patients with a duplicate name. Click **Patients** to open the Patient Finder. Click [New List > Patients > Duplicate Patient Name](#).

E.g. Find all CDM patients. Click **CDM Finder Tool** to open the Patient Finder. Click [New List > Reviews Due > CDM Reviews Due](#) and select All Reviews.

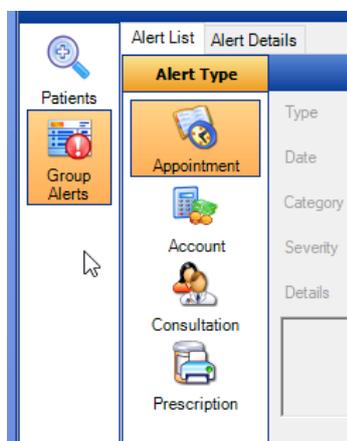


Once you find the relevant patients, click **Group Alert**. Add each group alert that you want for these patients.



### Manage Group Alerts

Open the **Group Alerts** tab to view all group alerts added.



To modify an alert, select it from the list. The Delete and Resolved button are enabled when an alert is selected.

Date	Category	Severity	Details	Active	Deleted	Resolved	Patients
30/06/2022	General	Medium	Advise patient to make an appointment for bloods before refill will be completed	6	0	0	6
17/06/2022	General	Medium	There are other patient in surgery with the same name. Confirm date of birth, address	385	1	0	386
17/06/2022	General	Medium	Ask patient do they consent to sms. Update Patient Registration. Close this Alert.	492	4	1	497

Double clicking on an alert will show a list of all patients who have this alert in their chart.

Alert List	Alert Details	Surname	Firstname
✓	⊙ ✖	Socrates	Barbara
✓	⊙ ✖	Socrates	Cathy
✓	⊙ ✖	Socrates	Patient
✓	⊙ ✖	Socrates	Patient1
✓	⊙ ✖	Socrates	Patient2
✓	⊙ ✖	Socrates	Patient3