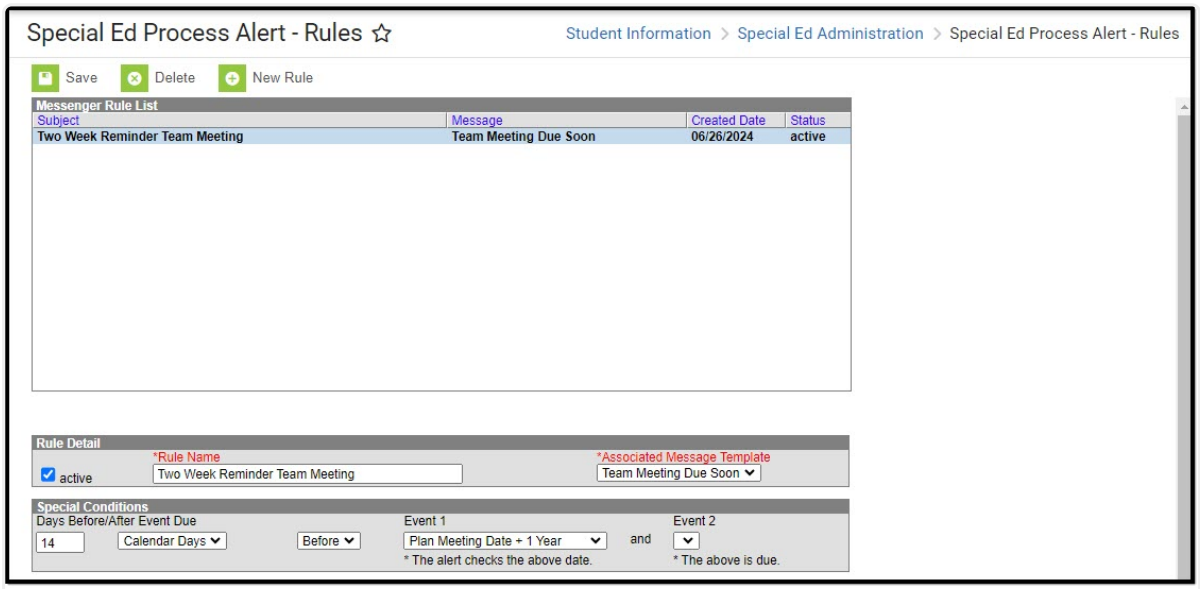
Special Ed Process Alert Rules

Last Modified on 09/09/2026 2:44 pm CDT

Tool Search: Process Alert Rules

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.



Process Alerts Rules editor

See the Special Ed Process Alerts Tool Rights article for information on the tool rights needed for this tool.

Process Alerts Rules Editor

The following options are available.

Rule Detail

Field	Description
Active	Selection indicates the rule is currently active.

Field	Description
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
Age 14 Birthday	Not applicable
Age 17 Birthday	Not applicable
Age 18 Birthday	Not applicable
Age 21 Birthday	Not applicable

Event 1 Options	Event 2 Options
Age 3 Birthday	Not applicable
Age 5 Birthday	Not applicable
Age 6 Birthday	Not applicable
Age 7 Birthday for Developmentally Delayed	Not applicable
Age 9 Birthday	Not applicable
Previous Evaluation + 2 Years *Pennsylvania Only* The student's Primary Disability Category must be set to Intellectual Disability on the Enrollments tool for this process alert to work.	New Evaluation (2-year)
Previous Evaluation + 3 years	New Evaluation (3 year)
Evaluation Consent Date	• Evaluation Date OR • Evaluation - Determination Date
Evaluation - Determination Date	Not applicable
Evaluation Date	Plan Start Date
Plan End Date	Locked IEP Starting
Plan Meeting Date + 1 Year	Not applicable
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

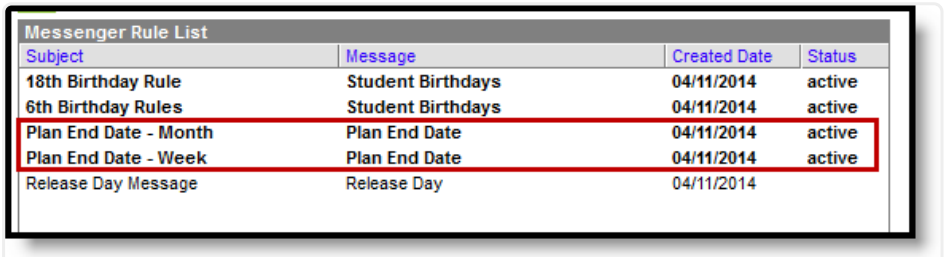
1. Enter the number of **Days Before/After Event Due**.
2. Select the option of whether to count by **School Days** or **Calendar Days**.
3. Select the **Before** or **After** option from the dropdown list.
4. Select the event for which this rule applies and the before/after logic is applied in the **Event 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.



Messenger Rule List

Subject	Message	Created Date	Status
18th 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	

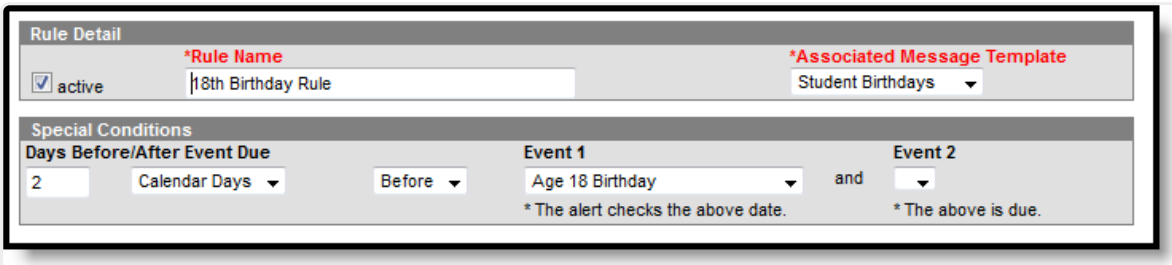
Process Alerts Rulers - Multiple Alerts

Examples of Process Alert Rules and Conditions

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

Age Rules

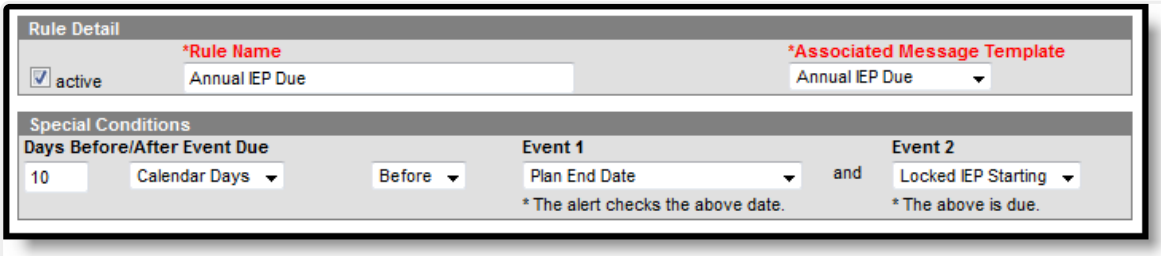
Rules may be set to remind case managers of students' upcoming birthdays (ages 3, 6 and 18) when the case manager is required to perform an action.



Birthday Rule

Annual IEP Due

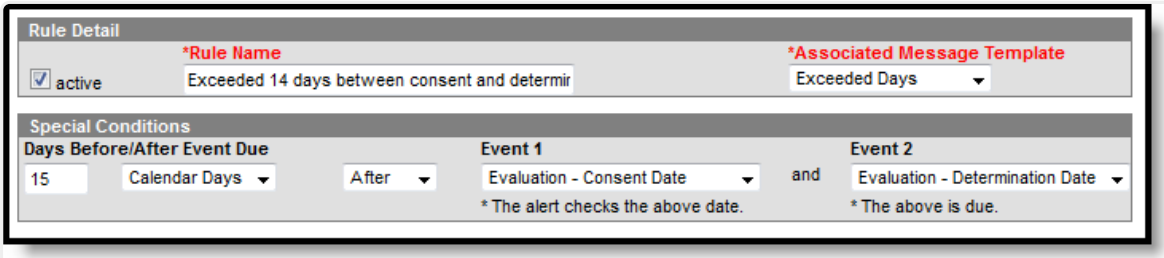
Rules may be set to remind case managers of expiring IEPs and indicate that a new locked IEP will be needed.



New IEP Needed

Exceeded Days

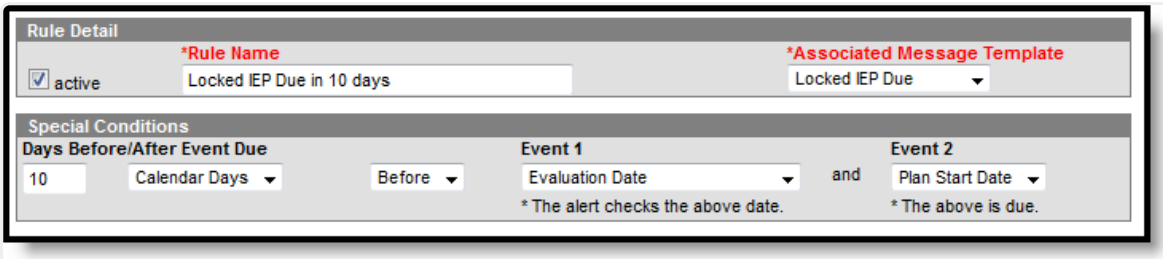
Rules may be set to remind case managers if they have exceeded a certain number of days between receiving consent to evaluate and evaluation determination, as necessary for completion of special education documents.



Exceeded Days

Locked IEP

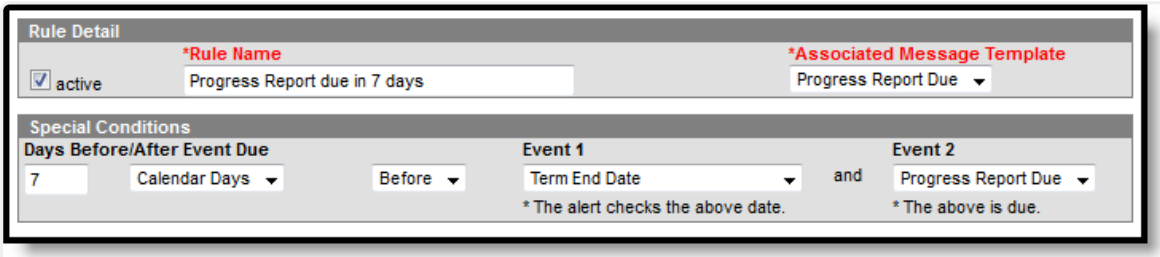
Rules may be set to remind special education case managers when a locked IEP will be due for a student (after an evaluation has been locked and saved).



Locked IEP Needed

Progress Report

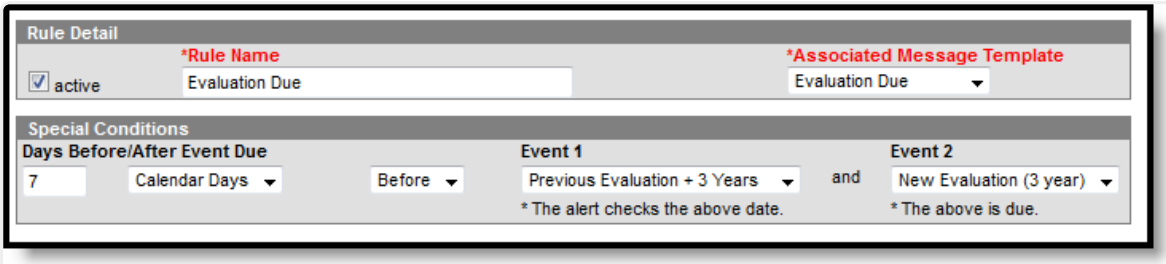
Rules may be set to remind special education case managers when a progress report will be due for a student (as the term nears its end).



Progress Report

Evaluation Due

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



Evaluation Due