

# Process Alerts Rules

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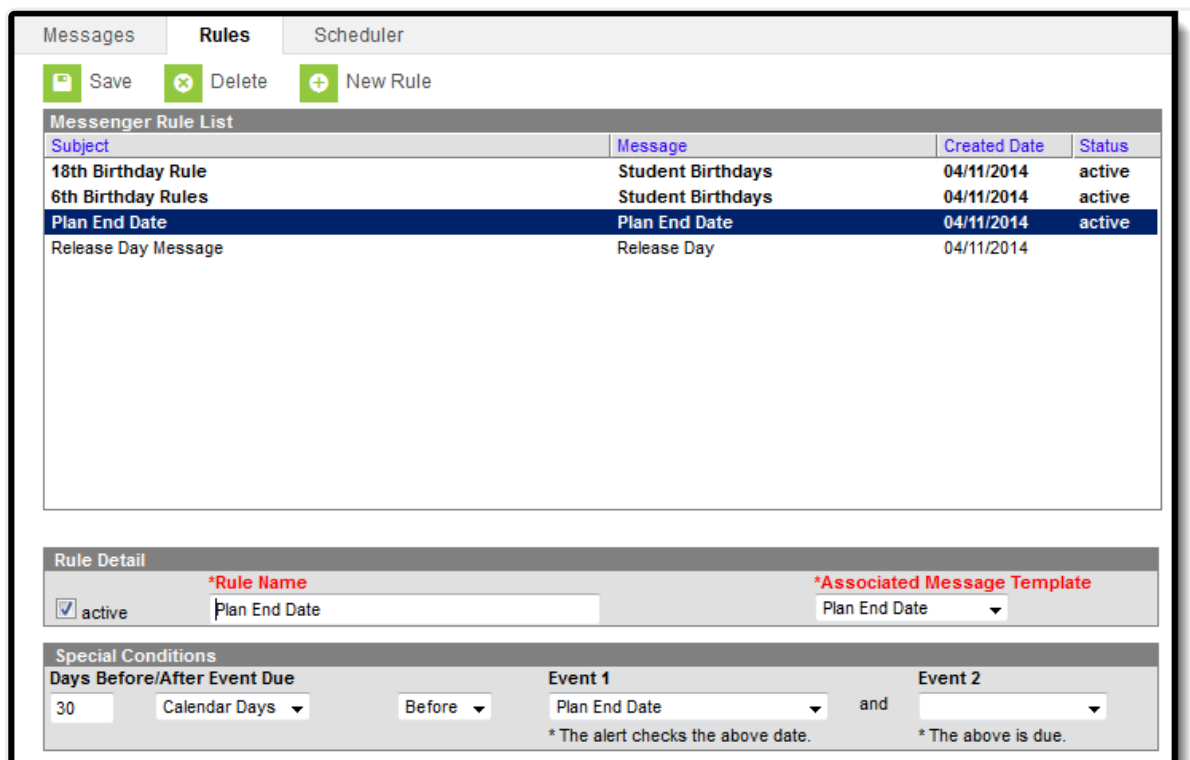
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**Classic Path:** System Administration > Special Ed > Process Alerts > Rules

**Search Terms:** Process Alerts 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.



The screenshot shows the 'Rules' tab in the Process Alerts Rules editor. At the top, there are tabs for 'Messages', 'Rules', and 'Scheduler'. Below the tabs are three buttons: 'Save' (with a floppy disk icon), 'Delete' (with an 'X' icon), and 'New Rule' (with a plus icon). The main area is titled 'Messenger Rule List' and contains a table with the following data:

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	Plan End Date	04/11/2014	active
Release Day Message	Release Day	04/11/2014	

Below the table is a 'Rule Detail' section. It includes a checkbox for 'active' (checked), a text input for '\*Rule Name' with the value 'Plan End Date', and a dropdown for '\*Associated Message Template' with the value 'Plan End Date'. Below this is a 'Special Conditions' section. It has a 'Days Before/After Event Due' section with a value of '30' and a dropdown for 'Calendar Days'. It also has two event sections: 'Event 1' with a value of 'Plan End Date' and 'Event 2' with a value of 'and'. Below these are two footnotes: '\* The alert checks the above date.' and '\* The above is due.'

Image 1: Process Alerts Rules editor

## Process Alerts Rules Editor

The following options are available.

### Rule Detail

Field	Description
<b>Active</b>	Selection indicates the rule is currently active.
<b>Rule Name</b>	Name of the rule.
<b>Associated Message Template</b>	Template from the <a href="#">Messages</a> tool assigned to the rule.

## Special Conditions

Field	Description
<b>Days Before/After Event Due</b>	Number of days before or after when the message should be sent.
<b>Count Option</b>	Entered number above is based on either School Days or Calendar Days.
<b>Before/After Logic</b>	<p>If the message related to the rule is to be sent BEFORE an event, select the “Before” option.</p> <p>If the message is to be sent AFTER an event, select the “After” option.</p> <div> <p>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.</p> </div>
<b>Event 1</b>	Selection indicates the event to which the before/after selection applies. See the list of <a href="#">Event Options</a> available.
<b>Event 2</b>	Selection indicates the event to which the before/after selection applies. See the list of <a href="#">Events Options</a> available.

## Event Options

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

Event 1 Options	Event 2 Options
<b>Age 10 Birthday</b>	Not applicable
<b>Age 14 Birthday</b>	Not applicable
<b>Age 17 Birthday</b>	Not applicable
<b>Age 18 Birthday</b>	Not applicable

Event 1 Options	Event 2 Options
Age 21 Birthday	Not applicable
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 + 3 years	New Evaluation (3 year)
Evaluation Consent Date	<ul style="list-style-type: none"> <li>Evaluation Date OR</li> <li>Evaluation - Determination Date</li> </ul>
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	

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 Detail			
<input checked="" type="checkbox"/> active	*Rule Name 18th Birthday Rule	*Associated Message Template Student Birthdays	
Special Conditions			
Days Before/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.	

Image 3: 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.

Rule Detail			
<input checked="" type="checkbox"/> active	*Rule Name Annual IEP Due	*Associated Message Template Annual IEP Due	
Special Conditions			
Days Before/After Event Due		Event 1	Event 2
10	Calendar Days	Before	Plan End Date
		and	Locked IEP Starting
		* The alert checks the above date.	
		* The above is due.	

Image 4: 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.

Rule Detail			
<input checked="" type="checkbox"/> active	*Rule Name Exceeded 14 days between consent and determinir	*Associated Message Template Exceeded Days	
Special Conditions			
Days Before/After Event Due		Event 1	Event 2
15	Calendar Days	After	Evaluation - Consent Date
		and	Evaluation - Determination Date
		* The alert checks the above date.	
		* The above is due.	

Image 5: 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).

Rule Detail			
<input checked="" type="checkbox"/> active	<b>*Rule Name</b> Locked IEP Due in 10 days	<b>*Associated Message Template</b> Locked IEP Due	
Special Conditions			
<b>Days Before/After Event Due</b>		<b>Event 1</b>	<b>Event 2</b>
10	Calendar Days	Before	Evaluation Date
		and	Plan Start Date
		* The alert checks the above date.	
		* The above is due.	

Image 6: 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).

Rule Detail			
<input checked="" type="checkbox"/> active	<b>*Rule Name</b> Progress Report due in 7 days	<b>*Associated Message Template</b> Progress Report Due	
Special Conditions			
<b>Days Before/After Event Due</b>		<b>Event 1</b>	<b>Event 2</b>
7	Calendar Days	Before	Term End Date
		and	Progress Report Due
		* The alert checks the above date.	
		* The above is due.	

Image 7: Progress Report

## Evaluation Due

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

Rule Detail			
<input checked="" type="checkbox"/> active	<b>*Rule Name</b> Evaluation Due	<b>*Associated Message Template</b> Evaluation Due	
Special Conditions			
<b>Days Before/After Event Due</b>		<b>Event 1</b>	<b>Event 2</b>
7	Calendar Days	Before	Previous Evaluation + 3 Years
		and	New Evaluation (3 year)
		* The alert checks the above date.	
		* The above is due.	

Image 8: Evaluation Due