

Setting Up an Alert*

*This content was adapted from a DOQ-IT University resources created for the Centers of Medicare & Medicaid Services (CMS) by MassPro: <http://www.masspro.org/HIT/DOQU/index.php>

Determine if an Alert is the Best Method

Think about the goal you want to meet and if an alert is the best way to meet that goal. Would relevant data presentation, an order set, a documentation tool or work flow changes be more effective or an easier method?

Determine Where the Alert Will Have the Most Impact in the Workflow

The alert will generally have the most impact when an action pertinent to the alert is taken.

An alert can appear:

- when the patient's EHR record is first accessed
- in a medication list
- in a note section
- upon check out or when scheduling follow up appointments
- in a specific alert section in the EHR

Decide How the Alert Will Function

An alert should be used to guide care without impeding or negatively affecting the workflow.

Consider these questions when determining how your alert will function:

- Does the alert require a provider response before moving to a new task?
- Does a reason need to be documented to override an alert?
- What is the maximum delay before lack of acknowledgement prompts escalation of the intervention? Who will get the alert?
- Can an alert be removed? If so, does it have to be acknowledged first?
- Can clinicians select "do not show this alert again" or other means to cease certain notification alerts? Or possibly enable specific alerts for specific patients?
- How long can the alert be stored in the electronic record?

Determine How to Assess Success

What measure will be chosen to determine whether the intervention was effective and when will that assessment occur?

Develop a Roll-out Plan and Set a Start Date

Determine the steps necessary to implement the alert and establish a start date.

Collect User Feedback

Meet with the team to discuss the impact of the alert. Create an easy method to allow users to provide feedback on an alert and its associated workflows.

Review Alert Success

Assess if the alert functions as intended and is getting the desired results.

Depending on the sophistication of your EHR you may be able to create a report showing how alerts are being used or if they are ignored. Consider the following to help you make this determination:

- What is the average number of alerts going off in the average office visit? Calculate or observe a few clinical visits.
- Is the alert too sensitive? (e.g., does it come on inappropriately, or for minor criteria that are not meaningful?)
- Is the alert accepted by staff or ignored? If ignored, why?
- Is the alert firing in multiple locations in the chart?
- Is the alert still meaningful/up to date? A process to review alert usefulness or appropriate guideline information should be part of ongoing quality processes.