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The Message Alert Scheduler Feature allows CAREWare administrators to send out email or user messages based on their selection of recipients and performance measures. It supports:

- Notification about clients who match the Performance Measure
- Sending user messages to a single user
- Sending email to a single recipient
- Sending user messages/email to Form Employees
- Sending user messages/email to Eligible Users

### **Accessing the Message Alert Scheduler**

The Message Alert Scheduler can be accessed by Central or a Provider by following these instructions:

1. Click *Administrative Options*.
2. Click *Message Alert Scheduler*.

 Customize  
Provider Summary  
Add Client  
Find Client  
Reports  
Rapid Entry  
Appointments  
My Settings  
System Information  
System Messages (38)  
**Administrative Options**  
Switch Providers  
Log Off  
My Links

<https://hab.hrsa.gov/program-grants-management/careware>

Join us for the Next CW Features in Focus webinar on Wed Aug 17th, 2 022! Time to be announced on the Listserv.


Administrative Options

### Administrative Options

<a href="#">Provider User Manager</a>	Manage Provider and User Permissions
<a href="#">Clinical Setup</a>	Manage Available Clinical Definitions
<a href="#">Provider Setup</a>	Manage Provider Settings
<a href="#">Service/Contract Setup</a>	Manage Contracts And Available Service Types
<a href="#">Custom Features</a>	Manage Custom Fields and provider/client summaries
<a href="#">Data Import and Export Features</a>	(PDI, PDE, HL7)
<a href="#">Required Data Elements</a>	Set requirements for client data entry before allowing other data entry
<b><a href="#">Message Alert Scheduler</a></b>	<b>Manage Message Alert Scheduler</b>
<a href="#">Third Party Billing</a>	Configure billing options or generate billing records
<a href="#">Employee Setup</a>	Link a user account to employee information
<a href="#">Manage Referral Setup</a>	Manage external providers, referral classes and more
<a href="#">HOPWA Setup</a>	Manage HOPWA Setup

## Adding Message Alerts

Adding new Message Alerts can be done within the list view for *Message Alert Scheduler*:

 Customize  
Provider Summary  
Add Client  
Find Client  
Reports  
Rapid Entry  
My Settings  
System Information  
System Messages (815)  
Administrative Options  
Switch Providers  
Log Off

Administrative Options > Message Alert Scheduler  
Manage Add Delete Back Print or Export Hide/Show Columns  

### Email Alert Scheduler


Search:   

Provider	Performance Measure	Email	User
Default	Core01 - HAB: HIV viral load suppression		CWTEMP

## Message Alerts Setup Screen

The setup screen for Message Alerts changes depending on who the *Message Recipient* is. However, some elements still remain present no matter the recipient.

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 Customize  
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Rapid Entry  
Appointments  
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My Links

Administrative Options > Manage > Manage

Save Back

### Manage

Message Recipients:

Provider:

Performance Measure:

Message Type:

Client Identifier:

Subject (for email):

Message Body Header:

**Provider:** If done in Central Admin, all available providers will be listed. This setting is used to determine the client list and where to run the performance measure.

**Performance Measure:** A list of available Performance Measures

**Message Type:** A selection of whether to send it out as an Email or User Message

**Client Identifier:** If both *Email* and *Form Employees* are selected as the Message Type and Message Recipients, then this list unlocks with three options: *Client ID*, *Encrypted URN* and *URN*. The email will contain this information when sent.

**Subject (for email):** If *Email* is selected for message type, then subject will become available. A subject must be entered.

The following section is divided into the different types of *Message Recipients* and what information they would need in order to function.

**User:** When User is selected as the Message Recipient, a new combo box called User will appear. This combobox lists all the available users. The selected User will be the only one to receive a message. *Note: As of Build 157, You cannot send an email with User selected as a Message Recipient.*

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Administrative Options > Manage > Manage

Save Back

Manage

Message Recipients: User
Provider: Default
Performance Measure: 09c8 - Copy of Copy of AIDS Clients on HAART\_3877\_654f
User: CWTEMP
Message Type: User Message
Client Identifier:
Subject (for email):

Message Body Header: Please see the aggregate pickup performance measure below. There is a link from the main menu in CAREWare to get a client level listing.

**Email Match:** When this is the selected *Message Recipient*, a text input box called email address will appear, prompting a user for an email address. Note: As

of Build 157, you cannot send a user message with Email Match selected as a Message Recipient.

A screenshot of the HRSA CAREWare web application. The page is titled "Administrative Options > Manage > Manage" and has "Save" and "Back" buttons. The main heading is "Manage". The form contains several fields: "Message Recipients:" with a dropdown menu showing "Email Match"; "Provider:" with a dropdown menu showing "Default"; "Performance Measure:" with a dropdown menu showing "09c8 - Copy of Copy of AIDS Clients on HAART\_3877\_654f"; "Email Address:" with a text input field containing "testemail@google.com"; "Message Type:" with a dropdown menu showing "Email"; "Client Identifier:" with an empty text input field; and "Subject (for email):" with a text input field containing "Required Subject". Below these fields is a large text area for the "Message Body Header:" containing the text: "Please see the aggregate pickup performance measure below. There is a link from the main menu in CAREWare to get a client level listing." On the left side of the page, there is a sidebar with a "Customize" button and a list of links: "Provider Summary", "Add Client", "Find Client", "Reports", "Rapid Entry", "Appointments", "My Settings", "System Information", "System Messages (38)", "Administrative Options", "Switch Providers", "Log Off", and "My Links". At the bottom of the sidebar, there is a URL: "https://hab.hrsa.gov/program-ants-management/careware" and a message: "Join us for the Next CW features in Focus webinar on Wed Aug 17th, 2 22! Time to be announced on the Listserv."

**Form Employees:** When this is the selected *Message Recipient*, a combo box called *Form Design* will appear, which contains all the available forms. The message will be sent to employees selected on the specified form. If *Message Type* is also set to *Email*, then *Client Identifier* becomes available.

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Administrative Options > Manage > Manage  
Save Back Help

### Manage

Message Recipients: Form Employees

Provider: Default

Performance Measure: 09c8 - Copy of Copy of AIDS Clients on HAART\_3877\_654f

Form Design: Untitled Form16

Message Type: Email

Client Identifier: Client ID

Subject (for email): Subject

Message Body Header: Please see the aggregate pickup performance measure below. There is a link from the main menu in CAREware to get a client level listing.

**All Eligible Users:** No Additional Information is needed for this selection. However, the messages will only be sent to users who have the permission *Receive User Messages*, a provider-level permission that can be assigned to user groups or individual users.

To assign this permission to a user navigate to:

1. Click *Administrative Options*.
2. Click *Provider User Manager*.
3. Click *Manage Users*.
4. Click *Select User*.
5. Click *Manage Permissions*.
6. Search for *Receive User Messages*.

Customize

Provider Summary

Add Client

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Administrative Options

Administrative Options

Provider User Manager

Manage Provider and User Permissions

Clinical Setup

Manage Available Clinical Definitions

Provider Setup

Manage Provider Settings

Service/Contract Setup

Manage Contracts And Available Service Types

Custom Features

Manage Custom Fields and provider/client summaries

Data Import and Export Features

(PDI, PDE, HL7)

Required Data Elements

Set requirements for client data entry before allowing other data entry

Message Alert Scheduler

Manage Message Alert Scheduler

Third Party Billing

Configure billing options or generate billing records

Employee Setup

Link a user account to employee information

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Manage external providers, referral classes and more

HOPWA Setup

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Administrative Options > User Manager (Default)

Cancel

Provider User Manager

Manage Users

Select a user and manage access to features within the provider. 8 total users

Manage User Groups

Work with user permission groups that can be assigned to users. 7 total user groups

Manage Permissions

360 / 362 permissions granted



- Customize
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- System Information
- System Messages (815)
- Administrative Options
- Switch Providers
- Log Off

Administrative Options > Provider User Manager > Manage Active Users > CWTEMP

[Back](#)

### CWTEMP

- [User Info](#) CW TEMP (CWTEMP)
- [Assign Providers](#) Central Administration, Default
- [Assign Provider Groups](#) All Permissions
- [Manage Permissions](#) 251 / 271 permissions granted
- [Locked Providers](#) User locked out of 0 / 2 providers
- [Change Password](#) User password last updated on 3/6/2023 2:33 PM
- [Change Username](#) Change this user's Username
- [Change OIDC Matching Values](#) OpenID Connect is not enabled
- [Reset Security Challenges](#) Security challenges feature should be activated and 'Security Question Admin' permission should be granted to enable
- [Undo Password Lockout](#) Not Locked Out

- Customize
- Provider Summary
- Add Client
- Find Client
- Reports
- Rapid Entry
- Appointments
- My Settings
- System Information
- System Messages (47)
- Administrative Options
- Switch Providers
- Log Off
- My Links

Administrative Options > User Manager (Default) > Manage Users > CWTEMP > Permissions for User: CWTEMP

[Assign User Groups](#) [Grant Individual Permission](#) [Revoke Individual Permission](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

### Permissions for User: CWTEMP

Search: [Recieve User Message](#)

Final Permission Status	Permission	Granted via Groups	Granted Individually	Permission Category
Denied	<a href="#">Recieve User Message</a>	No (Locked for Provider)	No	Messaging

<https://hab.hrsa.gov/program-grants-management/careware>


## Message Alert Summary Screen

After selecting a message alert or adding a new one, you'll be taken to the summary screen. Here you can edit the alert, manage the frequency, set columns for the main menu link and send alerts.

The screenshot shows the HRSA Message Alert Scheduler interface. At the top is the HRSA logo with the text "Ryan White & Global HIV/AIDS Programs". Below the logo is a navigation menu with options: Customize, Provider Summary, Add Client, Find Client, Reports, Rapid Entry, Appointments, My Settings, System Information, System Messages (37), Administrative Options, Switch Providers, Log Off, and My Links. The main content area is titled "Administrative Options > Message Alert Scheduler > Manage" and includes a "Back" link. The "Manage" section contains four buttons: "View/Edit Schedule" (with value "09c8-Copy of Copy of AIDS Clients on HAART\_3877\_654f, Default,"), "Set Alert Frequency" (with value "Every Monday"), "Set Columns For Main Menu Link" (with value "URN, Last Name, First Name"), and "Send Alert Now" (with value "Alert will be sent to"). At the bottom left, there is a URL "https://hab.hrsa.gov/program-grants-management/careware" and a notice about a webinar on August 17th, 2022.

## Set Columns For Main Menu Link

New alerts will have the default columns of URN, Last Name, and First Name. New Report fields can be added and managed through this screen. For more information, view this page for Custom Reports: [Creating Custom Reports](#).

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Log Off  
My Links

[Administrative Options](#) > [Message Alert Scheduler](#) > [Manage](#) > [Field Selection](#)  
[Manage](#) [Add](#) [Move Up](#) [Move Down](#) [Delete](#) [Templates](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

## Field Selection


Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
URN	URN	1.20			0	Complete
Last Name	Last Name	1.08			0	Complete
First Name	First Name	1.08			0	Complete

<https://hab.hrsa.gov/program-grants-management/careware>

## Set Alert Frequency

This screen allows you to set the frequency of the alert sent out to users.

 Customize  
Provider Summary  
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Find Client  
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My Links

[Administrative Options](#) > [Message Alert Scheduler](#) > [Manage](#)  
[Edit](#) [Back](#)

## Event Scheduler

Starting:

Repeat Options

Repeat Type:

Sunday: ☐  
Monday: ☒  
Tuesday: ☐  
Wednesday: ☐  
Thursday: ☐  
Friday: ☐  
Saturday: ☐

<https://hab.hrsa.gov/program-grants-management/careware>

The Next CW Features i  
n Focus webinar is sche  
duled for Oct 19, 2022!  
Topic to be announced  
on the Listserv.

## Send Alert Now

This link will send out messages once clicked. It will match the criteria of your settings and will notify you when the message has been sent.