DataPoint User Guide

Alerts – Intermediate Functionality

How to Set, Edit, or Delete Alerts and Set Email Notifications

Contents

Purpose

The purpose of this user guide is to outline the following:
- creating alerts
- finding alerts
- editing alerts
- deleting alerts
- creating an email notification for new data updates

Creating Alerts

You can create alerts for predefined metric levels within the summary reports and dashboards. When you set an alert, you will get notified once the metric alert you set hits a specific level. Alerts can be set on any metric that populates on a table within DataPoint.

To create an alert, navigate to a report or dashboard you would like to review. As an example, we will illustrate setting an alert for IP Admissions from the **Cost and Utilization Drivers Dashboard**, found under the **Utilization** dropdown.

From the Cost and Utilization Drivers Dashboard summary page, click the **Utilization** tab.
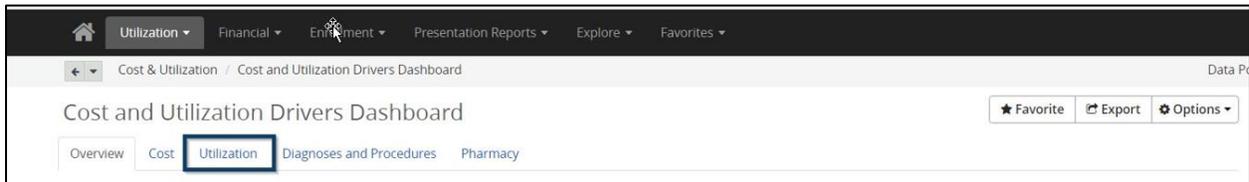
Navigate to the desired metric and hover over it (in this case, IP Admissions). The metric is available for an alert if the carrot icon appears. Once you hover over the metric, and see the carrot icon, click on it.

IP Utilization Metrics - Rolling Paid Year View

Metrics	Oct 2018 - Sep 2019	Oct 2019 - Sep 2020	Oct 2020 - Sep 2021
Paid per IP Admission	$25,786.79	$22,501.53	$30,806.46
IP Admissions	247	201	186
IP Admissions per 1000	79.8	66.6	64.8
IP Days per 1000	363.5	360.6	435.8

A pop-up box will appear, click **Create Alert**.

Another pop-up box will appear. The alert will be customized based on the selections made in the following fields:

- **Alert name** – set the alert name using the default naming convention based on the metrics and filters you selected
- **Filter by** – choose the filter you would like to view when you receive the alert
- **Alert when** – choose the metric and threshold you want to be alerted about
- **Priority** – choose the priority for the alert. Options include Informative, Positive, Attention, and Critical.
- **Check** – choose the alert frequency. Options include Daily, Weekly, Monthly, All Post Dates, and Month End Post Dates.
- **Starting on** – choose when you want the alert to begin. **Tip**: take into consideration the load date when choose the **Starting on** date.
- **Notification** – click the check box so you receive an email when an alert is triggered

Once all selections are completed, click the blue **Create** button.

Finding and Editing Alerts

To find the alerts that have triggered your set threshold via DataPoint, navigate to the **Notifications** button on the top right of your screen and select **Alerts**.
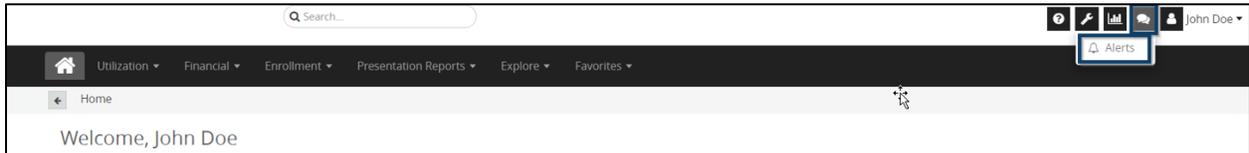
Three tabs will populate:

- Triggered – includes alerts if a metric or value meets or exceeds the threshold
- Not Triggered – alerts that have been created, but have not met the threshold
- All Alerts – a combination of triggered and not triggered alerts that have been created
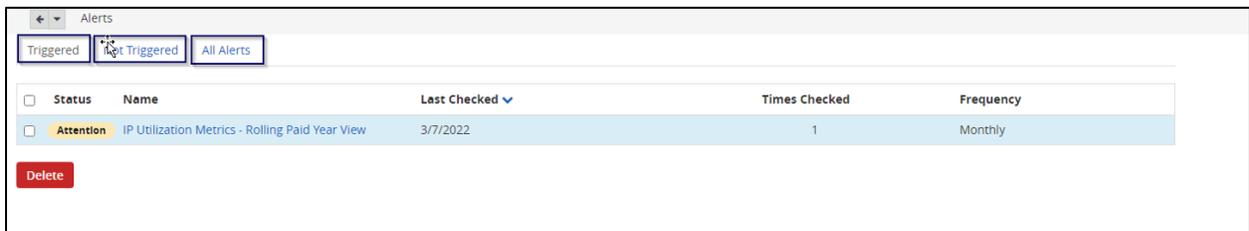
Each tab will show status, name, when and how often the alert was checked, and the frequency of the created alert.

Back to the example illustrated above, within the list of alerts, you will find the alert set for IP Utilization Metrics from Cost and Utilization Drivers Dashboard.

To edit any of the previously populated fields, click on the alert name. A pop up box will appear allowing you to edit the alert. Once you have updated any fields as needed, click the blue **Save** button.
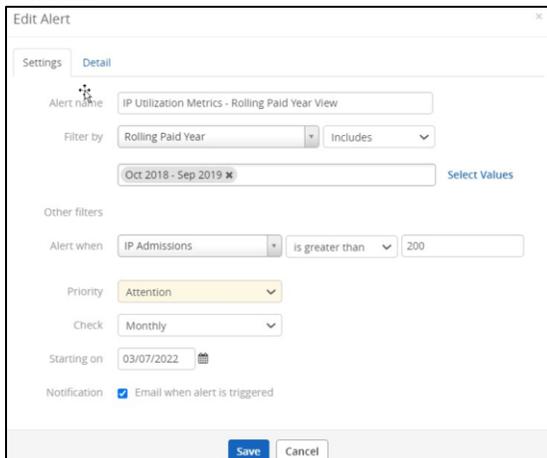
Deleting Alerts

From the dashboard above, found under the Notification icon in the top right corner of the screen, you can delete any alert that is no longer needed.

To delete the alert, select the checkbox on the left of the report information. Once selected, click the red **Delete** button that is located at the bottom of the list.

Creating an Email Notification

You can also be alerted when a new monthly claims file has been posted in DataPoint. To create this alert, click on your **Account Preferences** icon in the top right corner by your username.
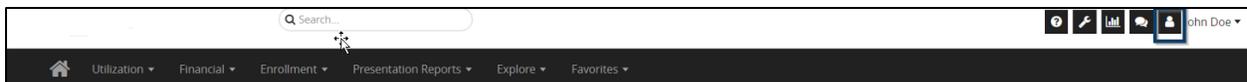
On the **Preferences** screen, scroll down and click the check box next to **Post Date Email Notifications** and then click the blue **Save Changes** button.