

The Special Alert

The **Special Alert** function on **IO Insight** enables you to catch the attention of other PA's and direct them to important information in the **Notes Tab** when they access a client's record for the first time. A **Special Alert** message can contain a warning about the client's behaviour or important information about how to work with the client. It can be anything that you deem to be important for another PA to read or know about before they work with a client for the first time. Please remember that this information should always be factual, accurate and not excessive.

Adding the Special Alert on the Client Page

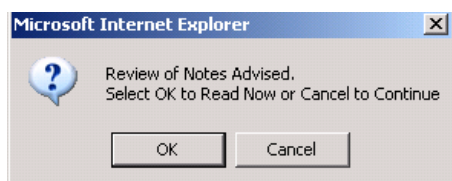
From the client **Summary** page, click on the **Notes Tab** (circled below in red).



Clicking on the pen and paper icon next to **Special Alert** (circled in red, right) will allow you to add a new **Special Alert**.



You can now enter the **Special Alert** message and click **Save New**. This means that every time the client record is accessed by yourself or another PA, a warning box will appear (see below).



By clicking **OK** on the warning box, you will be taken straight to the client's **Notes Tab**, where you can read the alert by clicking the glasses icon (circled in red, below). Or, by clicking **Cancel**, the record will open as normal.

In addition to the [Special Alert](#) box, a small warning triangle will appear next to the client Ref on every page, letting staff know that there are notes to be read (circled in green, right).



To remove or edit a [Special Alert](#) message, you will need to click the [Edit](#) icon in the [Notes Tab](#) again and enter the amended alert and [Save Changes](#) or click [Delete](#).