

September 1, 2016 – Please Note: The My List and Alerts Tabs are in the process of being populated. Access to the People Tab has been removed to insure people’s privacy and maintain regulatory compliance.

My List

Step #	Action	Step #	Action
My List			
Purpose:	Search for a subset of persons based on identified criteria or a category.		
1	Click on My Lists tab		
2	Click on Person Support Plan or Service Authorization*		
Individual Support Plan		Service Authorization	
3	Verify accuracy of the Show Me field	3	Verify Accuracy of the Show Me field
4	Input the Waiver if known (optional field)	4	Input the Waiver if known (optional field)
5	Click the drop-down arrow to select the Annual ISP Status	5	Click on the drop-down arrow to select the Status
<i>Annual ISP due in X Days only</i>	<i>Input the applicable number of days in the Due in Days field</i>		Complete optional fields with known information
6	Click Filter	6	Click Filter
7	Click View for the desired person	7	Click View for the desired person

*Based on agency and Provider role

Alerts

Step #	Action
Purpose	View and accept notification from different WaMS Users
1	Click on Alerts, verify in Alerts Home
2	Input the desired search dates
Optional	Identify the Group Results By to organize the results by selection
Optional	Optional: Click Advanced Search and input the Person’s Name/ID #
3	Click Submit
4	Identify the Person and Alert Description
5	Click Go to access the window associated with the alert
<i>Manage Alerts – Mark as Unread, Read, Accept, or Archive</i>	
	Click the box to the left of the Person’s Name
	Click on the desired action – Unread, Read, Accept, or Archive

Alerts Home and Archived actions are the same.