Alert Groups in SimboConnect: Overview - Admin Panel

Purpose: Explain what an Alert Group is, how alerts flow during after-hours, and how to view Alert Groups in the Phone Copilot admin menu.

What is an Alert Group

An Alert Group is a reusable alerting protocol or alerting preference that tells Phone Copilot who to notify, when to notify, and how to notify during after-hours on-call requests. Each Alert Group can contain one or more alert steps. Each step defines:

- **Interval (minutes):** How long Phone Copilot waits before the next step if no one has handled the request.
- **Who:** The on-call assignee for that step. Phone Copilot supports three roles: **Primary**, **Backup 1**, and **Backup 2**.
- **Mode:** How notification is sent. Supported modes include **Text**, **Call**, and **Email**.

You select an Alert Group when you set up an on-call schedule. This keeps your escalation logic consistent across schedules.

Alert Types

When you create an Alert Group, you choose one of these types to scope when the group applies:

- **Doctor-based alert:** Targets a specific doctor.
- **Call-type based alert:** Targets a specific call category such as urgent.
- **Custom alert:** Free-form name for any internal policy you want to use.

How alert steps work

1. The first step runs at **0 minutes** from the time Phone Copilot receives the on-call request.
2. If the request is not resolved within the step’s interval, the next step runs.
3. Steps continue until someone picks up the request or the sequence ends.

Example flow: Text the **Primary** at 0 minutes. If unresolved after 15 minutes, place a Call to the **Primary**. If still unresolved, escalate to **Backup 1**, and so on.

Where to view Alert Groups

1. Sign in to Phone Copilot as an administrator.
2. Open **Admin** in the top bar.
3. In the left panel, expand **On-call Schedule Management**.
4. Select **Alert Groups**.
5. You will see each group with its steps listed by **Interval (minutes)**, **Who**, and **Mode**. Use the page controls to review or open a group.

When Alert Groups are used

- During after-hours or any schedule where you attach an Alert Group.
- Any time Phone Copilot needs to notify the on-call team based on your policy.

Tips and good practices

- Keep the first step at **0 minutes** to avoid delays for urgent requests.
- Use clear **Custom** names so schedulers can pick the right policy quickly.
- Prefer short intervals between early steps, and longer intervals later.
- Always include a final escalation to **Backup 2** to reduce missed calls.
- Review groups after any staffing changes to keep **Primary**, **Backup 1**, and **Backup 2** accurate.
- If Email is part of your workflow, include it as an early heads-up and follow with Call for escalation.

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