Create or Edit an Alert Group for After-Hours On-Call Alerts - Admin Panel

Purpose: Provide step-by-step instructions to add a new Alert Group or edit an existing one, and explain each field.

Before you start

- Confirm that your on-call providers are assigned as **Primary**, **Backup 1**, and **Backup 2** in your on-call schedule.
- Decide the alert type you need: **Doctor-based**, **Call-type based**, or **Custom**.

Add a new Alert Group

1. Go to **Admin**.
2. Open **On-call Schedule Management** in the left panel.
3. Select **Alert Groups**.
4. Select **Add** to open the Alert Group form.
5. **Select Alert Type**
   - **Doctor-based alert:** Choose the doctor.
   - **Call-type based alert:** Choose the call type or tag such as urgent.
   - **Custom alert:** Enter a clear name for the policy.
6. Build your alert steps:
   - For **Alert 1**, set **Interval (minutes)**. Use **0** for immediate notification.
   - Choose **Mode**: **Text**, **Call**, or **Email**.
   - Under **On Call Doctors**, select who receives this step: **Primary**, **Backup 1**, or **Backup 2**.
   - Select the **plus** icon to add more steps. Repeat interval, mode, and who for each step.
   - Use increasing intervals to create an escalation path.
7. Select **Save**. Your new group appears in the list and is ready to attach to on-call schedules.

Edit an existing Alert Group

1. Go to **Admin** → **On-call Schedule Management** → **Alert Groups**.

2. Open the group you want to change.
3. Update the **Alert Type** settings if needed.
4. Adjust steps: change **Interval**, **Mode**, or **Who**. Use the **plus** icon to add steps. Remove any step you no longer need.
5. Select **Save** to apply the changes.

Use the Alert Group in an on-call schedule

1. Open **Admin** → **On-call Schedule Management** → **On Call Schedule**.
2. Create or edit the schedule for after-hours.
3. In the schedule setup, choose the **Alert Group** you created.
4. Save the schedule.

Input forms reference

- **Select Alert Type:** Controls when the group applies.
- **Interval (minutes):** Delay before moving to the next step if unresolved.
- **Mode:** Delivery channel used for the step.
- **On Call Doctors:** The target role for the step. SimboConnect supports **Primary**, **Backup 1**, and **Backup 2**.

Tips and good practices

- Start with a simple two-step pattern: **0 min Text to Primary**, then **15 min Call to Primary**. Add further steps only if needed.
- Keep intervals realistic. Typical patterns are 0, 10–15, 30 minutes.
- Use **Call** for escalations where acknowledgement is critical.
- Avoid duplicate steps that notify the same person in the same way without added value.
- Review and test after saving. Place a test call during a low-risk window to confirm delivery paths.
- Document the meaning of each **Custom** group name in your internal runbook so the team picks correctly during scheduling.

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