

CENTRAL REGISTRY PROCEDURE MANUAL

Subject: Using the Reminder Function

Number: 650-53

Effective Date: 11/25/2020

PURPOSE:

To assist in case management, reminders may be set to ensure timely follow-up.

GUIDANCE:

Central Registry authorized users and EMSA staff may place a reminder on an individual EMT certificate record as needed to manage deadlines and to follow up on outstanding or ongoing tasks.

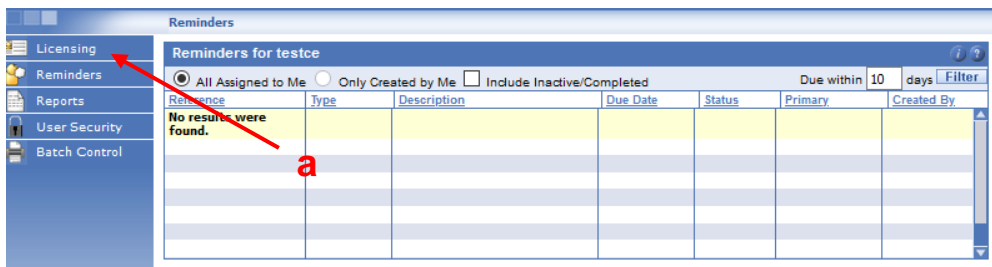
Suggested uses:

1. Investigation deadlines
2. Probation monitoring and status change
3. Returning calls
4. Pending certifications (i.e. pending receipt of DOJ or FBI background reports)

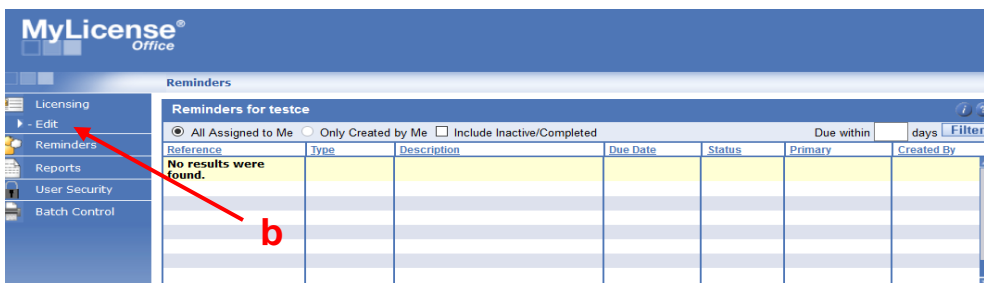
PROCEDURE:

Creating Reminders

1. Once you are logged into MLO, click on the Licensing module (a) to see the Edit option.



In the left column of the Central Registry under Licensing, click > Edit (b).



For questions or support, send an email request to mlohelpdesk@emsa.ca.gov using the [MLO Helpdesk Keywords](#).

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2. Select the EMT, AEMT or applicant profile to open the record.

The screenshot shows the 'Person' record form in the Licensing system. The 'Facility' tab is selected. Fields include: Profession (Certifying Entity), License Type (EMT), License Number, License Status (<All Status>), First Name, Middle Name, Last Name (Thunder), Address Line1, Address Line2, City, State, Zip Code, SSN, and Address Type (General). A 'Licensee Only' checkbox is checked. A 'Licensee - Person Advanced' link is visible at the bottom.

3. Once the record is open, click on the **Reminders** drop down on the top right and click **Create** from the dropdown list (a).

The screenshot shows the search results for the license record. A red arrow labeled 'a' points to the 'REMINDERS' dropdown menu in the top right corner, which has a 'Create' option selected. Below the search results, there are two detail windows: 'Person' and 'License'. The 'Person' window shows: Prefix, First Name: Stormy, Middle Name: Electra, Last Name: Thunder, Date of Birth: 12/15/1990, SSN: 444553333, Registration Code: 04284166, Gender. The 'License' window shows: License Type: EMT, Certification Number: E157413, Applicant Number: 254185, Status: Active, Date This Status: 09/04/2020, Reason Changed: License Issuance, Issue Date: 09/04/2020, Expiration Date: 09/30/2022, Effective Date: 09/04/2020.

4. Set the due date and enter a description in the highlighted fields below:

The screenshot shows the 'New Reminder for License #E157413' form. The 'Due Date' field is highlighted in yellow and contains '11/25/2020'. The 'Description' field is also highlighted in yellow and contains '254 Char. Max'. Other fields include: Lead Days, Critical Days, Status (Active), Created By (testoe), Work in Progress? (checked), Status Date (11/25/2020), Created On (11/25/2020), and Primary Assignee (null). Buttons at the bottom include Save, ReActivate, Complete, and Cancel.

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- Click "Save" after entering the due date and description

The screenshot shows a web form titled "New Reminder for License #E157413". The form contains several fields: "Due Date" (11/25/2020), "Lead Days", "Critical Days", "Status" (Active), "Created By" (testce), "Work in Progress?" (checked), "Status Date" (11/25/2020), "Created On" (11/25/2020), and "Primary Assignee" (null). A "Description" field contains the text "Return call to Clare regarding cert status." Below the form, there are four buttons: "Save", "ReActivate", "Complete", and "Cancel". The "Save" button is circled in red.

- Click the OK tab.

The screenshot shows the same "New Reminder for License #E157413" form as above. Below the form, a "Confirmation Message" dialog box is displayed with the text "Reminder has been created successfully". The "OK" button in the dialog box is circled in red.

- Your reminder is now active. The next screen will display your reminder and give you the option to Add, Edit or Complete the Reminder. Click Back to return to the EMT/AEMT record.

The screenshot shows a table titled "License Reminders for testce (Certifying Entity)". The table has columns for Reference, Type, Description, Due Date, Status, Primary, and Created By. The first row contains the following data: Reference: Lic. #E157413, Type: License, Description: Return call to Clare regarding cert status., Due Date: 11/25/2020, Status: Critical, Primary: testce, Created By: testce. Below the table, there are buttons for "Add", "Edit", "Complete", "In Progress", and "Include Complete". A "Back" button is circled in red.

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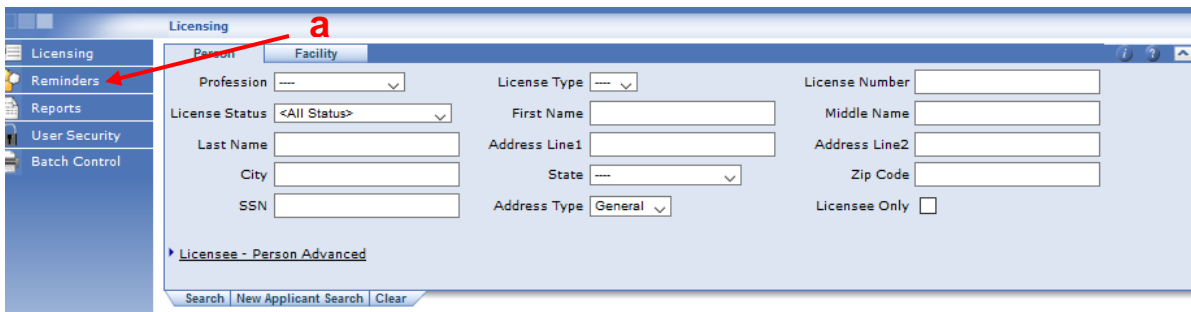
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Reminders will be displayed upon each individual login to the central registry.

You can also use the following process to view or search for reminders.

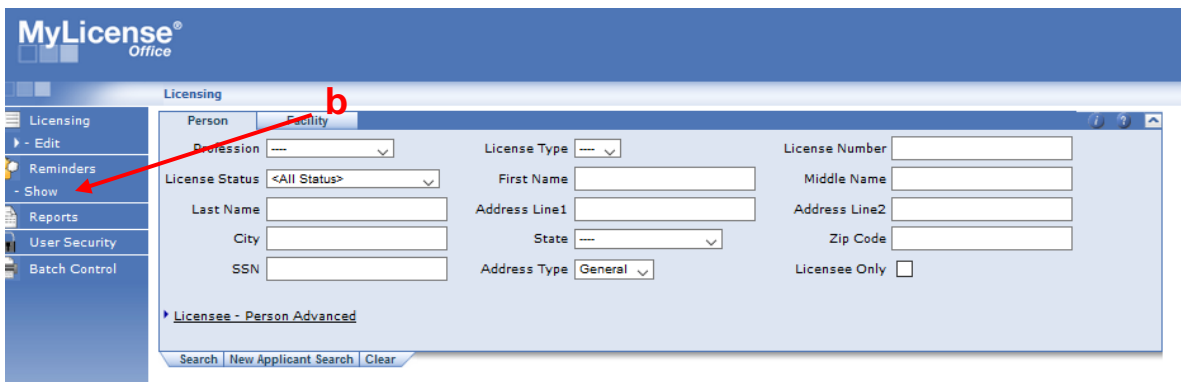
Viewing Reminders:

1. Click on the Reminders option (a) in the left column to access the *Show* function.



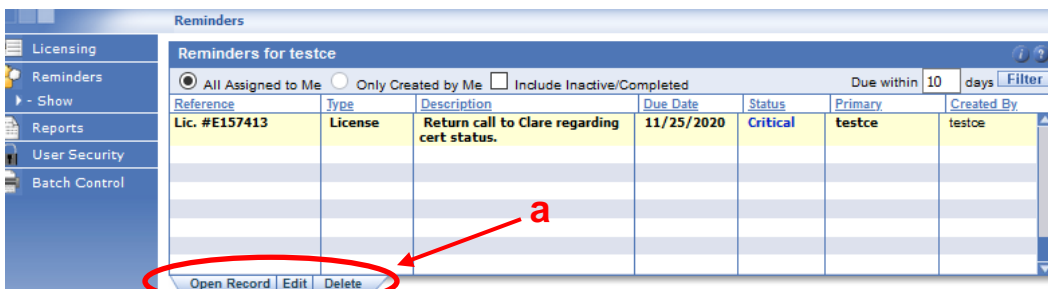
The screenshot shows the 'Licensing' application interface. On the left, there is a navigation menu with options: Licensing, Reminders, Reports, User Security, and Batch Control. A red arrow labeled 'a' points to the 'Reminders' option. The main area contains a search form with fields for Profession, License Type, License Number, License Status, First Name, Middle Name, Last Name, Address Line1, Address Line2, City, State, Zip Code, SSN, Address Type, and Licensee Only. There are also buttons for 'Search', 'New Applicant Search', and 'Clear'.

Click on **Show** to view reminders (b)



The screenshot shows the 'Licensing' application interface. On the left, there is a navigation menu with options: Licensing, Edit, Reminders, Show, Reports, User Security, and Batch Control. A red arrow labeled 'b' points to the 'Show' option. The main area contains the same search form as in the previous screenshot.

2. Click on option tab of choice to work with your reminder(s) (a).



The screenshot shows the 'Reminders' application interface. The main area displays a table titled 'Reminders for testce'. The table has columns: Reference, Type, Description, Due Date, Status, Primary, and Created By. There is a row with the following data: Reference: Lic. #E157413, Type: License, Description: Return call to Clare regarding cert status., Due Date: 11/25/2020, Status: Critical, Primary: testce, Created By: testce. Below the table, there are buttons for 'Open Record', 'Edit', and 'Delete', which are circled in red. A red arrow labeled 'a' points to these buttons.

Reference	Type	Description	Due Date	Status	Primary	Created By
Lic. #E157413	License	Return call to Clare regarding cert status.	11/25/2020	Critical	testce	testce

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