

Managing and Sending System/Staff Alerts in myEvolv

Quick and Dirty Overview videos:

- **Part 1:** <https://drive.google.com/file/d/1TmrF7iEEy6URQmsxkQCLP72AKw3iEbLZ/view>
- **Part 2:** <https://drive.google.com/file/d/1LwlUYGz5VVeZjazzw8ToT378qcOKPUK8/view>
- **Part 3:** https://drive.google.com/file/d/1_AHIErwyg8N6D7GTaFQzjTx3mskPZA45/view
- **Part 4:** https://drive.google.com/file/d/1tqkZOZkxeUqQOs67N_3geL9UN8VDFDih/view

Included in this guide:

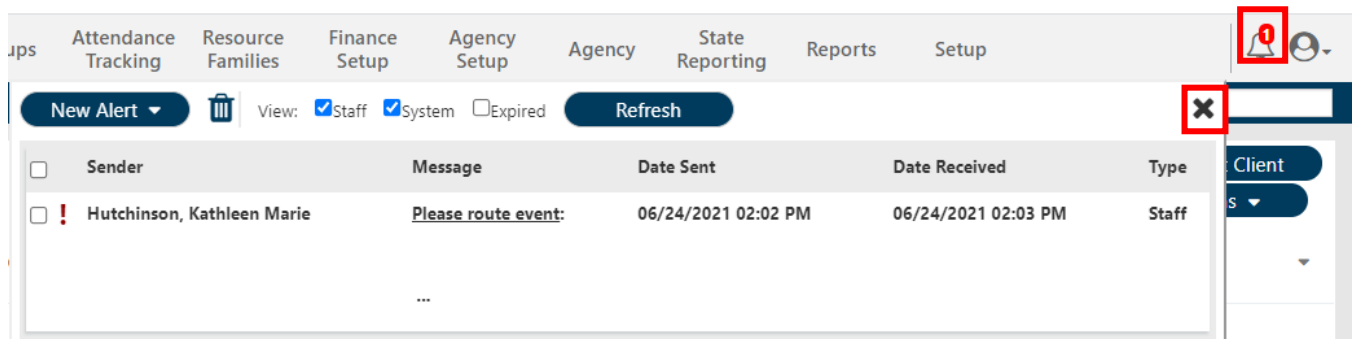
- How to View, Respond and Delete Alerts (p. 1)
- How to Send a System Alert from Alerts Window (p. 5)
- How to Send a Service Entry as a System Alert (p. 7)
- Sending Non-Services in a Staff Alert EX: Demographics Page (p. 9)
- How to Archive messages & View Sent Messages (p. 11)

System Alerts: System alerts are system generated alerts regarding added/removed tasks, upcoming/overdue tasks, new client assignments, etc.

Staff Alerts: Staff alerts are messages from other staff within myEvolv.

How to View, Respond, and Delete Alerts

- To open a list view of System and Staff Alerts, click the bell in the upper right-hand corner of the screen.
- To close the list view of System and Staff alerts, click the x in the upper right-hand corner of the window.

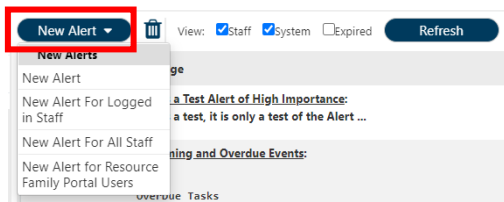


- When you first open the Alerts Window list, both System and Staff Alerts will be listed in date order with newest on top.
- Far right column indicates if an alert is a System or a Staff alert.
- Unread/Unopened alerts will show in a bold font.
- Alerts sent with High Importance will have an exclamation point!

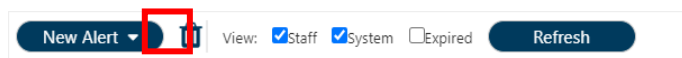
Managing and Sending System/Staff Alerts in myEvolv

Alerts Window Tools:

New Alert: Click open options of Alerts to send within myEvolv



Trash Icon: Once an alert is selected, it can be deleted by clicking the trash icon



View: Staff/System: The alerts list can be filtered to view only Staff Alerts or only System Alerts by unchecking either

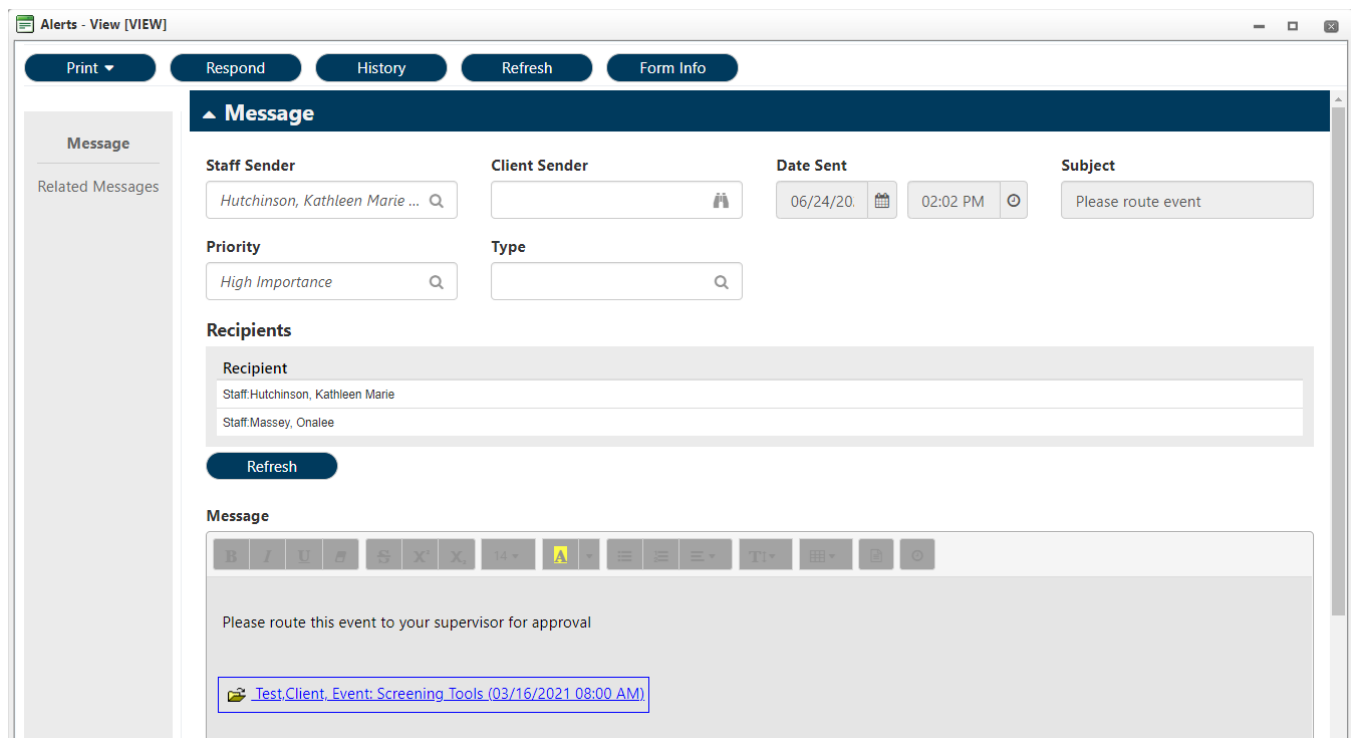


Refresh: To check for any incoming alerts since opening Alerts Window, click Refresh



Viewing an Alert

To view an alert, simply click the line to open it.



Managing and Sending System/Staff Alerts in myEvolv

Responding to a Staff Alert

*System alerts will have a blank Staff Sender field and Responses will not be seen by anyone.

- When you open a staff alert a window pops up to show Sender, Date Sent, Subject, Priority, Recipients and Message.
- If a response is necessary, Click Respond at the top.

The screenshot shows the 'Alerts - View [VIEW]' window. At the top, there are buttons for 'Print', 'Respond' (highlighted with a red box), 'History', 'Refresh', and 'Form Info'. Below these is a 'Message' header. The form contains several fields: 'Staff Sender' (Hutchinson, Kathleen Marie), 'Client Sender' (empty), 'Date Sent' (06/24/20, 02:02 PM), 'Subject' (Please route event), 'Priority' (High Importance), and 'Type' (empty). Under 'Recipients', there is a list of 'Staff: Hutchinson, Kathleen Marie' and 'Staff: Massey, Onalee'. A 'Refresh' button is below the recipients. The 'Message' section has a rich text editor with a toolbar and the text 'Please route this event to your supervisor for approval'. At the bottom of the message area is a link: 'Test.Client, Event: Screening Tools (03/16/2021 08:00 AM)'.

- Response Will be Sent To: This field will automatically populate with the staff who sent you the alert and cannot be changed
- Priority: Select High Importance or Low Importance
- Subject: This field will automatically populate and cannot be changed
- Recipients: Additional staff or WorkGroup can be included in response
- Message Text: Include your message within the messages field, like you would an email

Click Send

Managing and Sending System/Staff Alerts in myEvolv

The screenshot shows the 'Alerts - Respond [ADD]' window. At the top, there are buttons for 'Cancel', 'Print', 'Send' (highlighted with a red box), and 'Form Info'. The 'Message' section has a header 'Message' and a sub-header 'Message Text'. Below this, there are fields for 'Response Will be Sent To*', 'Priority', and 'Subject*'. The 'Response Will be Sent To*' field contains 'Hutchinson, Kathleen Marie (Ev...'. The 'Subject*' field contains 'RE: Please route event'. Below these fields is a 'Recipients' section with a table. The table has columns for 'Staff', 'WorkGroup', and 'Actions'. The 'Staff' column has a '+' icon and a search bar. The 'WorkGroup' column has a search bar. The 'Actions' column has an 'Actions' button. Below the 'Recipients' section is the 'Message Text' section. It has a header 'Message Text' and a sub-header 'Message*'. Below this is a text area with a rich text editor toolbar. The text area contains the message: 'Thanks! The event has been routed to supervisor for approval.' Below the text area is a summary of the message: 'From: Hutchinson, Kathleen Marie', 'Sent: 2021/06/24 14:02:55', 'To: Hutchinson, Kathleen Marie', and 'Subject: Please route event'. Below the summary is the message body: 'Please route this event to your supervisor for approval'.

Deleting an Alert

To delete an alert after you are finished with it, click the check box next to the correct alert and then click the trash icon.

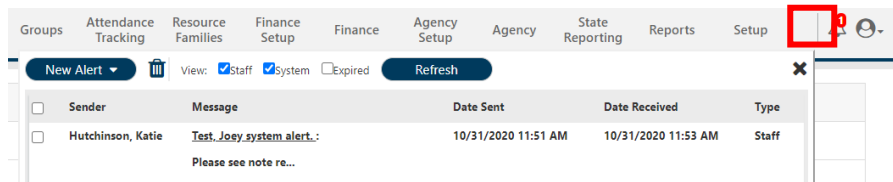
The screenshot shows the 'New Alert' window. At the top, there is a 'New Alert' button and a trash icon (highlighted with a red box). Below this is a 'View' section with checkboxes for 'Staff', 'System', and 'Expired'. There is also a 'Refresh' button. Below the 'View' section is a table with columns for 'Sender', 'Message', 'Date Sent', 'Date Received', and 'Type'. The table contains one row of data: 'Hutchinson, Katie', 'Test Staff Alert:', '11/02/2020 06:34 PM', '11/02/2020 06:34 PM', and 'Staff'. The first column of the table has a checkbox, which is checked (highlighted with a red box).

	Sender	Message	Date Sent	Date Received	Type
<input checked="" type="checkbox"/>	Hutchinson, Katie	Test Staff Alert:	11/02/2020 06:34 PM	11/02/2020 06:34 PM	Staff

Managing and Sending System/Staff Alerts in myEvolv

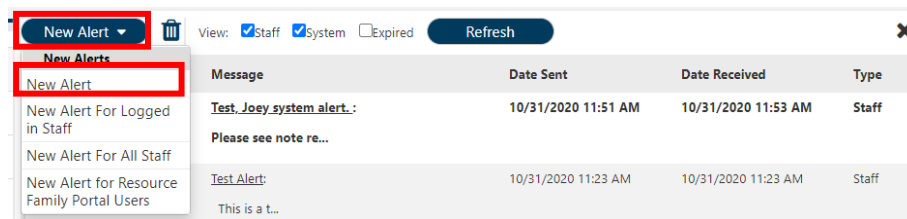
How to send an Alert from Alerts Window

Click the Alerts Bell in the upper right-hand corner of your screen to open alerts menu.



Click New Alert > Select type of New Alert

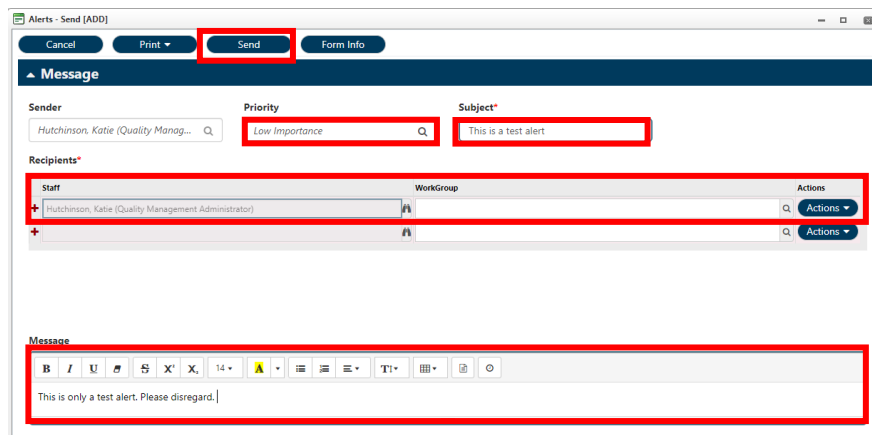
*For this guide, we are using the general New Alert



New Alert window will pop up.


- Sender: This name auto populates as worker signed in (this is you) and cannot be changed
- Priority: Select High or Low Importance
- Subject: Enter subject line of the alert
- Recipients: Select *either* staff or WorkGroup. Multiple staff or workgroups can be selected
 - If sending System Alert to one Staff member, use binoculars to select appropriate staff
 - If sending System Alert to a WorkGroup, use magnifying glass to select group
- Message: Include any information notes necessary for recipients.

Click Send.



Managing and Sending System/Staff Alerts in myEvolv

Alert will now appear in recipients' Alerts Window.

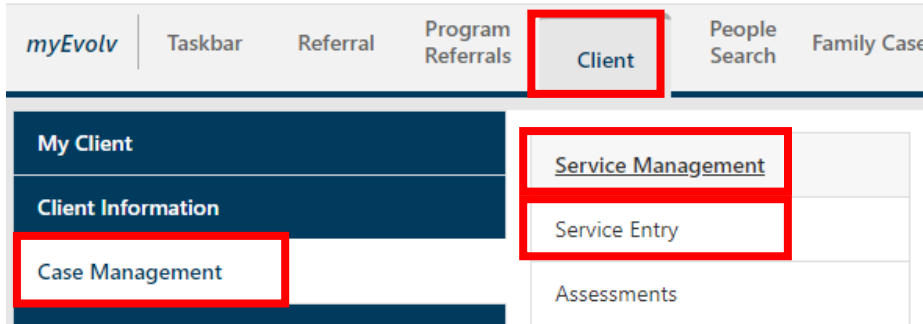
<div>New Alert  View: <input checked="" type="checkbox"/> Staff <input checked="" type="checkbox"/> System <input type="checkbox"/> Expired <div>Refresh</div></div> <div data-kind="ghost"></div> <div data-kind="ghost"></div> <div data-kind="ghost"></div> <div data-kind="ghost"></div> <div data-kind="ghost"></div>					
<input type="checkbox"/>	Sender	Message	Date Sent	Date Received	Type
<input type="checkbox"/>	Hutchinson, Katie	<u>This is a test alert:</u> This is only a test alert. Please disregard.&nb...	11/02/2020 07:13 PM	11/02/2020 07:13 PM	Staff

Managing and Sending System/Staff Alerts in myEvolv

Sending a Service Entry/Ticket as a Staff Alert

*The following process can be used for any service entry/group note/treatment plan/etc entered in myEvolv.

Breadcrumbs: Client > My Client > Service Management > Service Entry



Select and open the event you wish to send as a system alert

Intake Program (12/17/2018 08:00 AM - Current) (3)						
Service	Due Date	Scheduled Date	Actual Date	Duration	Staff	Status
Substance Use Assessment	01/24/2022				Massey, Onalee	Scheduled
Substance Use Assessment v2 (5)			04/21/2021 08:00 AM EST	01:00	Stevens, Donna	Approved, Billed
Problems/Needs - Person			04/21/2021 12:00 AM	00:00	Stevens, Donna	
Screening Tools			03/16/2021 08:00 AM EST	00:25	Massey, Onalee	Modifiable

Click Send Alert.



Complete Alerts message:

- Sender: This field cannot be edited
- Priority: Use magnifying glass to select High or Low Importance
- Subject: Enter subject line for alert
- Recipients: Select a staff or workgroup
- Multiple staff can be selected and multiple workgroups can be selected, however, a workgroup and a staff cannot be selected together.
- Message: A link to the service entry will be included in the message field. Add any additional notes.

Click Send.

Managing and Sending System/Staff Alerts in myEvolv

Alerts - Send [ADD]

Client: Test, Client DOB: 01/01/1980 ID# 00000002 Intake: 01/01/2018 08:00am

Cancel Print **Send** Form Info

Message

Sender: Hutchinson, Kathleen Marie (Evolv Support) Priority: High Importance Subject*: Please route event

Recipients*

Staff	WorkGroup	Actions
Massey, Onalee (Behavioral Health Technician)		Actions

+

Message

Please route this event to your supervisor for approval

[Test Client Event: Screening Tools \(03/16/2021 08:00 AM\)](#)

Alert will now appear in recipients' alerts window

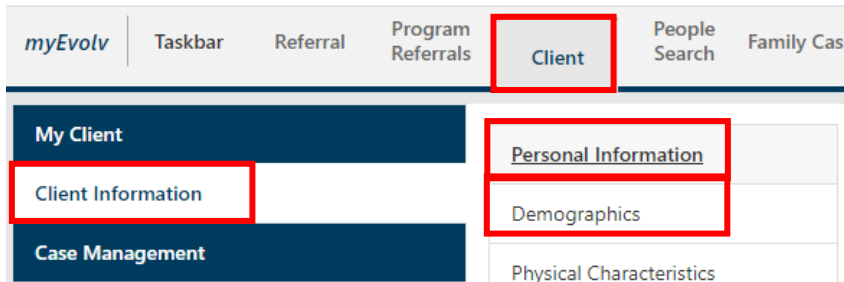
ps Attendance Tracking Resource Families Finance Setup Agency Setup Agency State Reporting Reports Setup					
New Alert View: <input checked="" type="checkbox"/> Staff <input checked="" type="checkbox"/> System <input type="checkbox"/> Expired Refresh					
<input type="checkbox"/>	Sender	Message	Date Sent	Date Received	Type
<input type="checkbox"/>	! Hutchinson, Kathleen Marie	<u>Please route event:</u>	06/24/2021 02:02 PM	06/24/2021 02:03 PM	Staff

Managing and Sending System/Staff Alerts in myEvolv

Sending Non-Service pages in a Staff Alert EX: Demographics Page

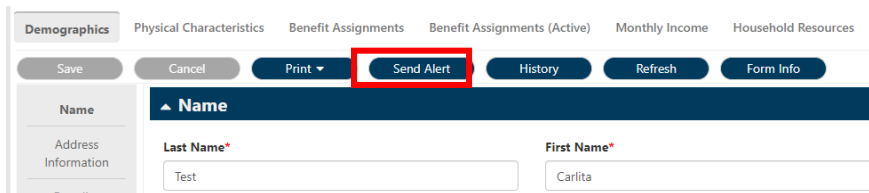
When a client reports a change in address, emergency contact, etc., this update can be communicated to another staff or workgroup via a Staff alert.

Breadcrumbs: Client > Client Information > Personal Information > Demographics



Update and save necessary changes to demographics information.

When you are ready to send the alert, click Send Alert.



- Sender: This field cannot be edited
- Priority: Use magnifying glass to select High or Low Importance
- Subject: Enter subject line for alert
- Recipients: Select a staff or workgroup
 - Multiple staff can be selected and multiple workgroups can be selected, however, a workgroup and a staff cannot be selected together.
- Message: A link to the Demographics page will be included within the message field. Add your notes

Click Send.

Managing and Sending System/Staff Alerts in myEvolv

Alerts - Send [ADD]

Cancel Print **Send** Form Info

Message

Sender
Hutchinson, Katie (Quality Management Administrator)

Priority
Low Importance

Subject*
Updated Emergency Contact 7256

Recipients*

Staff	WorkGroup	Actions
+ Hutchinson, Katie (Quality Management Administrator)	<input type="text"/>	<input type="button" value="Actions"/>
+ <input type="text"/>	<input type="text"/>	<input type="button" value="Actions"/>

Message

B I U **S X' X,** 14 **A** **≡ ≡ ≡** **Tl** **≡** **≡** **≡**

Client's emergency contact updated.

[_Test_Carlita_Event: Client Personal Information](#)

Alert will now appear in recipients' alerts window.

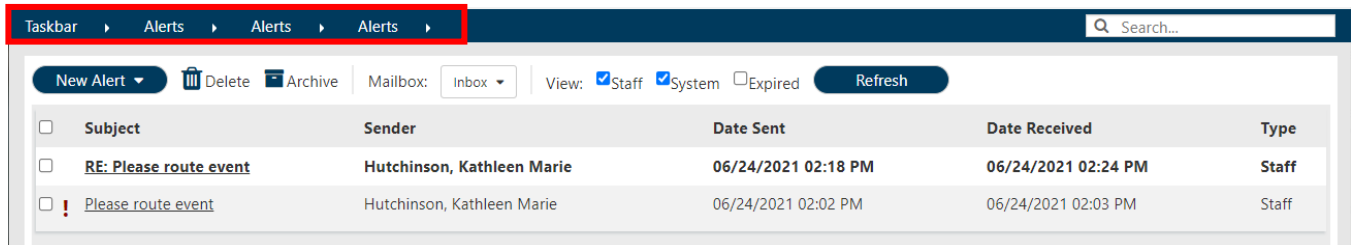
New Alert ☒ Staff ☒ System ☐ Expired

<input type="checkbox"/>	Sender	Message	Date Sent	Date Received	Type
<input type="checkbox"/>	Hutchinson, Katie	<u>Updated Emergency Contact 7256:</u> Client's emergency...	11/03/2020 01:39 PM	11/03/2020 02:05 PM	Staff

How to Archive messages & View Sent Messages

Breadcrumbs: Taskbar > Alerts > Alerts > Alerts

This view will provide all of the capabilities offered with the pop out box from the Alerts bell, with a couple additional features.

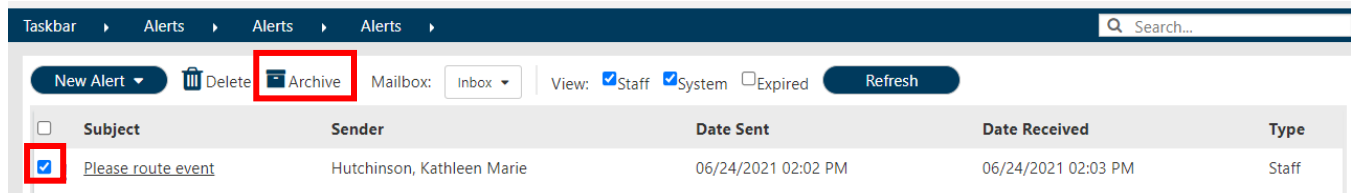


How to Archive Alerts Messages

To keep a message for future follow up but remove it from your in box, click the box next to the message you wish to archive.

Click Archive.

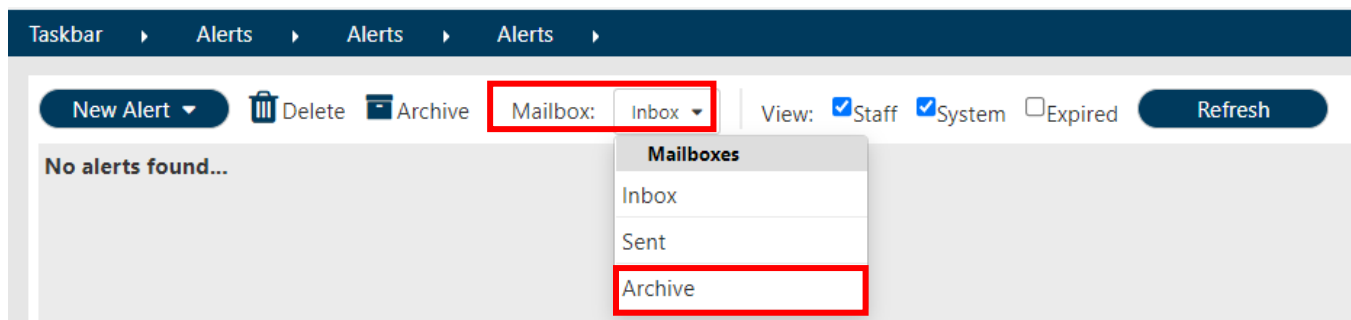
The message will disappear from your inbox.



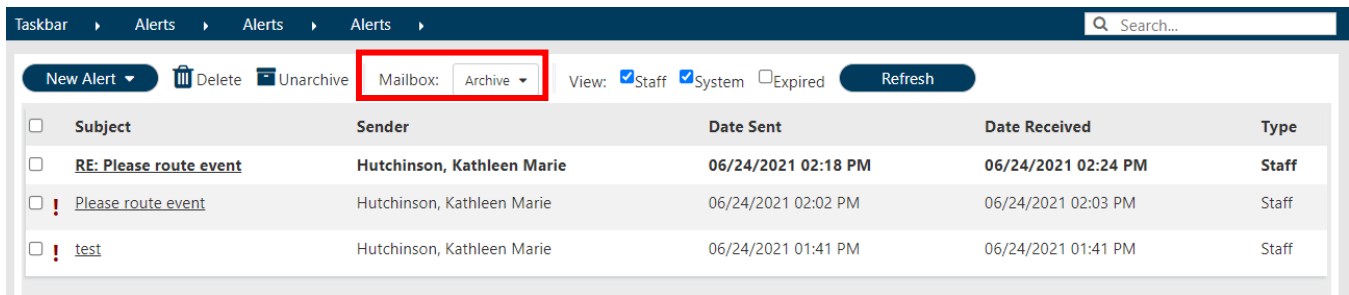
How to view Archived Messages

Click the down arrow next to Inbox to open drop down menu.

Click Archive to view Archived messages.

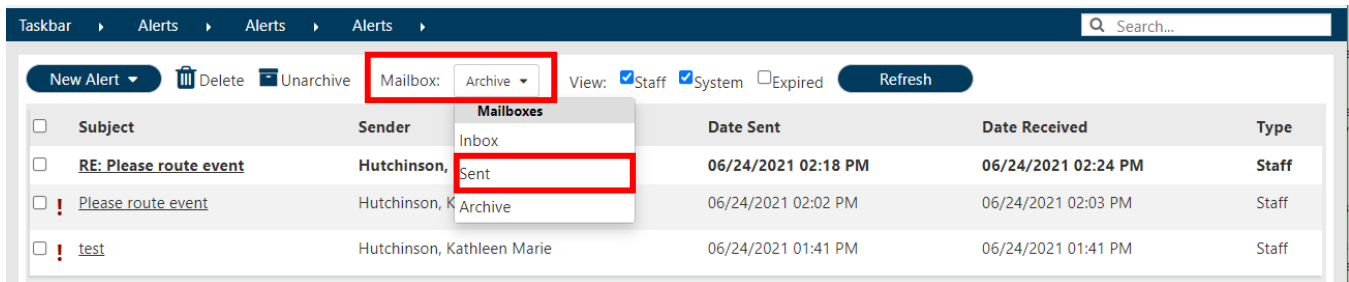


Managing and Sending System/Staff Alerts in myEvolv



How to view Sent Messages

Click the Mailbox dropdown menu and select Sent.



Sent messages will now be listed

