


Tips using myEvolv

Type the first letter to complete fields/narrow options with magnifying glass that opens a table of options.

In a field with a magnifying glass, instead of clicking the magnifying glass to open the table, type the first letter of the selection to fill the field.

EX) To enter RTC in the Facility field for a service ticket, simply type R and the field will complete with RTC.

Service Facility*


Use table code to fill fields with magnifying glass.

Most options listed on a table will have a code. Some codes are numbers and some are letters. Type the code to fill the field instead of opening table.

EX) Type 08 to enter Agency Office to complete Location Field:

Description	Code	C
Agency Office	08	n
Home	12	y
Other	99	y

Location

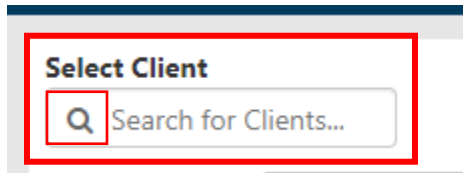
Use % for searching Groups or within tables.

When searching tables that have many options (some tables have hundreds of options) or if you do not find what you are looking for with an initial search, search for a keyword within the name of what you are searching using a % sign and keyword.

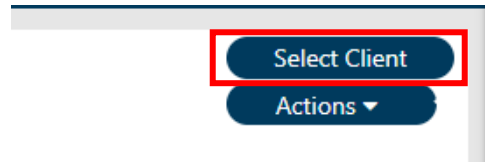
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Searching client after first signing in versus once already signed in.

If just signing in, click magnifying glass in Select Client field in the upper left-hand corner.




If already logged into the system, click Select Client field in the upper right-hand corner.



- Keep in mind that the only way to completely sign out of a client record is to log out of the system or to pull up another client record.

Troubleshooting searching a client.

If you are having a hard time finding your client in the system, try searching a partial name by entering just the last name and first initial, first couple of letters of each name, etc.

Name	DOB/Age	Address
 Test, Henry Client # 00000102	DOB: 10/01/1960 60 Yrs Male	1234 Cherry Lane, FREMONT, CA 94536

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Entering Dates

Type in date: Key in date manually by typing with MM.DD.YY or MM/DD/YY format

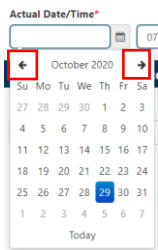
EX) 10.13.21 will complete as 10/13/2021.

Use Calendar icon:

- Click Calendar Icon to open calendar. Calendar will automatically open with today's date highlighted.



Use arrows to navigate backwards and forwards through months.



Click correct Date within calendar to complete field.



Entering Time:

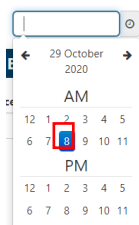
Type in time manually: Key in time by typing numbers with an a/p to complete field.

EX) 849a will complete the field as 8:49 AM.

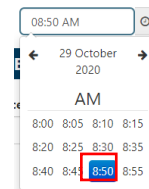
Click the clock icon.



Click the correct hour.



Minutes will be grouped in fives. Click to make selection.



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Entering Duration:

Enter time spent with client in this field. Once entered, double check to make sure duration is correct.

Tip: Enter duration in minutes.

Ex) If duration spent with client is 1hr 3min, enter 63 and system will automatically convert it to 1:03. If duration is entered as 1.03, system will convert it to 1:18.

Worker and Worker Role: Using binoculars/magnifying glass to complete fields.

The screenshot shows the 'Worker Transfer [ADD]' form. It has sections for 'Transfer From', 'Transfer To', and 'Transfer Information'. In the 'Transfer To' section, there are fields for 'Program', 'Type', 'Worker', and 'Worker Role'. The 'Worker' and 'Worker Role' fields have search icons (binoculars) next to them, which are highlighted with red boxes. Red arrows point from these search icons to two pop-up windows below the main form. The first pop-up window is titled 'Staff - Service Providers (Caseloads - Zip Zones)' and contains a table with columns: Last Name, First Name, Staff Name, Job Title, Active, Case Loads, Staff ID #, and Zipcode Zone. The second pop-up window is titled 'Worker Role (to a client or in a workgroup) Table' and contains a table with columns: Code and Worker Role.

Last Name	First Name	Staff Name	Job Title	Active	Case Loads	Staff ID #	Zipcode Zone
g	kar			<input type="checkbox"/>			

Code	Worker Role
COF_2	Supervisors/QA/Program Lead
COF_4	Finance
COF_5	Admin Support

Use Actions > Delete to delete a row within a form, instead of clearing each field individually.

There will be times when a field will not clear properly and you will be prevented from saving the service entry you are working on.

EX) Instead of clearing out each field of a row, click

The screenshot shows the 'Other Activities' table. The first row has the following data: Type: Documentation Time, Actual Date: 10/29/2020, Time: 11:00 AM, Duration: 00:15, Propagate Times: , Outcome Id: [empty]. The 'Actions' column for the first row has a dropdown menu with the 'Delete' option selected. Red boxes highlight the 'Actions' dropdown and the 'Delete' option.

Type*	Actual Date*	Time*	Duration	Propagate Times	Outcome Id	Actions
Documentation Time	10/29/2020	11:00 AM	00:15	<input type="checkbox"/>		Actions Expand Form Delete

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Actions > Expand Form

This opens a long version of Forms within service entries. It is not necessary to expand forms to complete the field, however, it may be helpful at times, especially when first learning the system.

Other Activities

Type*	Actual Date*	Time	Duration	Propagate Times	Outcome Id	Actions
Documentation Time	10/29/2020	11:00 AM	00:15	<input type="checkbox"/>		Actions
			HH:MM	<input type="checkbox"/>		Expand Form Delete

Other Activities

Type*	Actual Date*	Time	Duration	Propagate Times	Outcome Id	Actions
Documentation Time	10/29/2020	11:00 AM	00:15	<input type="checkbox"/>		Actions
Other Activity						Close
Documentation ...	10/29/2020	11:00 AM	00:15	<input type="checkbox"/>	code	

Use your Filters – For this example I am using the Service Entry Page, however, there are filters throughout the system and follow a similar format.

Click View Filters.

Client > Case Management > Service Management > Service Entry >

TEST, JOEY | ID# 00000047 | DOB 09/01/1970 | Intake 10/09/2020 | Location 1234 Cherry Lane, FREMONT, CA 94536

50 yrs Male

Service Entry | Assessments | Domains | Training | Referrals | FAS/CAFAS (R) Assessments | LA DMH | Integrated Assessments

Add New | Schedule Event | Refresh | **View Filters** | Group By | Program

By default, the date range of events shown on the Service entry page is 6 months. Use Calendar icons to adjust date range.

All Programs and Services (active/completed within date range) and Status of Services will be listed and all will be selected. Uncheck as necessary.

Click Apply Filters.

Add New | Schedule Event | Refresh | Hide Filters | Group By | Program

From Date	Programs	Services	Status	Apply Filters
05/01/2020	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> All	
Through Date	<input checked="" type="checkbox"/> Mental Health Services Diversion (10/13/2020 08:00 AM - Current)	<input checked="" type="checkbox"/> BHCS Behavioral Health Screening Form (18-)	<input checked="" type="checkbox"/> Approved, Billed	
11/01/2020	<input checked="" type="checkbox"/> Mental Health Services (10/12/2020 08:00 AM - Current)	<input checked="" type="checkbox"/> Crisis Intervention	<input checked="" type="checkbox"/> Modifiable	
	<input checked="" type="checkbox"/> Crisis Intervention (10/11/2020 12:00 AM - Current)	<input checked="" type="checkbox"/> Initial Psychosocial Assessment	<input checked="" type="checkbox"/> Pending Signature	
	<input checked="" type="checkbox"/> Substance Use Disorder (10/10/2020 08:00 AM - Current)	<input checked="" type="checkbox"/> MH File Note (non billable)	<input checked="" type="checkbox"/> Pending Signature, Billed	
	<input checked="" type="checkbox"/> Mobility Management (10/09/2020 08:00 AM - Current)	<input checked="" type="checkbox"/> MH Individual Session	<input checked="" type="checkbox"/> Pending Submission	
	<input checked="" type="checkbox"/> Transportation Services (10/09/2020 08:00 AM - Current)	<input checked="" type="checkbox"/> Managed Mobility Contact	<input checked="" type="checkbox"/> Scheduled	
	<input checked="" type="checkbox"/> Seasonal Shelter (10/09/2020 05:00 PM - 10/30/2020 08:00 AM)	<input checked="" type="checkbox"/> Service Plan Addendum		
		<input checked="" type="checkbox"/> Shelter Bed Nights		
		<input checked="" type="checkbox"/> Shelter Meal		
		<input checked="" type="checkbox"/> Taxi Service - Voucher Sale		
		<input checked="" type="checkbox"/> WAV - Voucher Sale		