Intro to Evolv: System Basics

ALL USERS
**myEvolv – System Overview and Navigation**

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System Requirements and Access

Workstation
- Operating System: Microsoft Windows Vista/Windows 7/Windows 10
- Web Browser: Microsoft Internet Explorer
  - See Evolv_IEsettings document for version requirements and settings instructions.
- Evolv-CS link: [https://webapps.yapinc.org/evolv_cs/login.aspx](https://webapps.yapinc.org/evolv_cs/login.aspx)
  - Evolv-CS link is also in UltiPro and the YAP employee website
  - Evolv user documentation is available to all staff on the YAP employee website.

Local Settings
Evolv uses the date/time/time zones on the user’s computer in various areas of the system, such as calendars and service entries. This directly impacts billing, scheduling and reporting. All users should check these settings on any computer being used to access Evolv.

- Right click on the date and time in the lower, right corner of the screen or access the settings through the Startup menu and Control Panel.

Tips and Shortcuts
- Full Screen: Hit F11 to view full screen. Hit F11 again to resume normal view.
  1. This will hide the space at the top of the screen used by Internet Explorer to display the web address and tool bar.
- Resize standalone windows: any standalone window can be re-sized (made smaller or larger) by doing the following:
  1. Move the mouse to the edge of the border of the window.
  2. Hold down the left mouse button.
  3. Drag the mouse/window border to the new size.
- Screenshot: Hold down the Alt key and hit the PrtScrn key
- Copy shortcut:
  1. Highlight area or text.
  2. Hit [CTRL + C] on your keyboard.
- Paste shortcut:
  1. Open an email or Word document and click into the body of the email, or Word document.
  2. Hit [CTRL + V] on your keyboard.
- WordPad/Notepad: use one of these programs (located in PC’s Windows Accessories folder) when typing progress note and/or treatment plan information that is to later be copied and pasted into Evolv. Word has imbedded formatting that creates errors and prevents users from being able to save their data in Evolv.
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**System Login**

https://webapps.yapinc.org/evolv_cs/login.aspx

**Active Directory Users**

YAP email account holders

- Email username and password are used to access Evolv.
- Enter usernames only, not complete yap email addresses.
- 3 failed attempts will lock the user’s active directory account.
- Active Directory box must be checked.

**Non-Active Directory Users**

Staff without YAP email accounts

- Usernames and passwords are provided upon account creation.
- Passwords are case sensitive.
- Users are prompted to change passwords every 90 days.
- 3 failed attempts will lock the user’s Evolv account.
- Active Directory box is *not* checked.
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System Logout

The Logout Button should be used to properly log out of the system.

System Timeout

Evolv will automatically log a user off if they are inactive for 20 minutes.

- The timeout is reset every time the user takes any action requiring access to the database, such as opening or saving a form, or navigating to another area.
- The timeout does not reset while typing in areas that do not require access to the database, such as progress notes and treatment plans.
- The timeout will not cause the user to lose data as long as they successfully log back in through the timeout screen.

  - When a user is approaching the timeout limit, this message appears first in white with red text.
  - As the user gets closer to the timeout limit, the message changes to red with black text.
  - To avoid timing out, the user can click on the Timeout message to reset the timeout countdown.
  - If a timeout occurs, the Login screen appears with a timeout notification message in red. Once the user logs back in, they will return to where they left off.
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System Structure

Modules

Modules provide points of entry into the system for each separate function within an Agency.

- Referral
- Client
- Family Cases
- Incidents
- and many more

Module Structure

Navigation is broken into three sub components:

- The Sub Modules are the main folders within a module.
- Each sub module contains Form Sets, which contain groups of Form Set Members that contain data.

Details

- **Sub-Modules** - the main folders within a module. Each sub module contains Form Sets, which contain groups of Form Set Members that contain data.

- **Form Sets** - a form or group of forms that allow you to view, edit, or add new information about a person, group, program, or any other instance of the myEvolv program. The ‘active’ formset member (area you are currently working in) is noted by a rectangular box around the form set member name. Most, but not all allow the entry/edit/deletion of Events.

- **Form Set Members** - a form or group of forms that allow you to view, edit, or add new information about a person, group, program, or any other instance of the myEvolv program. The ‘active’ formset member (area you are currently working in) is noted by a rectangular box around the form set member name. In addition, myEvolv offers dual navigation of Formset Members. Once an item is selected in the Navigation Pane, you will also be able to navigate via the blue tabs in the Workspace. Most, but not all allow the entry/edit/deletion of Events.
Error Messages

There are three different types of errors that you may receive when working in Evolv.

- **System Errors**
- **Data Relationship Errors**
- **Data Entry Validation Errors**

It is best to provide a screen shot and as much information as you can, such as where you were in the system and what you were trying to do when you received the error. IT will need this information in order to replicate the error as part of their troubleshooting process.

- To capture a screen shot, hold down the ALT key while pressing the Print Screen key. The screen shot can be pasted into an email or a Word document.

**System Errors**

System errors occur when the system cannot process a request because of an error in coding.

- The most common cause of this error is incorrect/non-configuration of Internet Explorer settings. Use the IE settings documentation to make necessary updates to IE settings.

**Data Relationship Errors**

Data Relationship or “logical” errors occur when you attempt to delete data from one area in the system that is still being used in other areas. This is a “user error.”

- You should read these messages carefully as they will often provide you with all the information you need to correct and save your data.
Data Entry Validation Errors

Data Validation errors occur when you attempt to save a Form without completing all the required fields. This is a “user error.”

- You should read these messages carefully as they will often provide you with all the information you need to correct and save your data.

System Navigation

Methods of Navigation
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**Evolv Button**

The Evolv button provides access to the Modules in the system.

Clicking the button expands the Module listing. Click again to close the Module listing.

Hover over a Module to view the Sub-Modules. Continue hovering while moving to the right to view the Form Sets and Form Set Members.
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**Navigation Pane**

The Navigation Pane also provides access to the Sub-Modules, Form Sets, and Form Set Members.
- Clicking the + icon expands the view.

Users can Dock/Undock the Navigation Pane with the push pin icon.

Hover over the Navigation icon to re-open. Click the push pin icon to re-dock the pane.

Click the push pin to un-dock and hide the pane.
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**Task Bar**

This group of icons allows access to stand-alone tasks that can be accessed at any time, from anywhere in the system.

- **myEvolv Launcher**
- **Supervisor Module**
- **Timesheets Module**
- **Application Maintenance**
- **Task List (Calendar)**
- **Alerts and Messages**
  - (no unread messages)
- **Alerts and Messages**
  - (unread messages)
- **Client Module**
- **Incidents**

**Personalized Navigation Buttons**

Evolv has Favorites, Most Visited and Most Recent options. This is similar to Internet Explorer, where you can bookmark sites, and History, which shows where you’ve been.

- Click Favorites and select Add to favorites to “bookmark” a specific location in Evolv.

**Parent Selection Bar**

The Parent Selection Bar indicates who or what a user is working on, including people, cases, etc. This will differ depending on which module the user is working in.
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- Example of an empty Client Module Parent Selection Bar

![Example of an empty Client Module Parent Selection Bar](image1)

- Example of a Client Module Parent Selection Bar where a client is selected

![Example of a Client Module Parent Selection Bar where a client is selected](image2)

**Breadcrumb Bar**

The Breadcrumb Bar displays the user’s current location in the system.

- For documentation purposes, this can be highlighted, copied and pasted into an email or Word document. This is useful when opening support tickets.

![Breadcrumb Bar](image3)

**User Profile**

Users can open the **Staff Lookup Their Own Information** standalone form by clicking on their name in the top, right corner of the screen.

![User Profile](image4)
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Staff Information

- Basic profile information can be viewed in this area.

- Additional tabs are located at the bottom portion of this screen.
  - **Current Direct Case Assignments** displays clients assigned to the user.
  - **Workgroup Enrollments** are another way users can be assigned/granted access to clients.
  - **Current Staff Supervising** displays subordinate staff assigned to the user.
    - Because of how the supervisor “nesting schemes” are structured, supervisor/subordinate assignments in Evolv may not reflect true agency supervisor/subordinate relationships.
  - **Navigation Preferences** allows users to change their navigation settings. (details in following section)
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Navigation Preferences

<table>
<thead>
<tr>
<th>Current Direct Case Assignments</th>
<th>Workgroup Enrollments</th>
<th>Current Staff Supervising</th>
<th>Navigation Preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalize Navigation Settings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Navigation Docked</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interface Color Scheme</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Load Last Loaded Form</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Is Navigation Docked: Navigation Bar default setting to dock or un-docked.

Load Last Loaded Form: Log in setting to take the user back to last location at log out

Module/Sub-Module/Form Set/Form Set Member: Sets default log in location

Display Most Visited: Controls Most Visited drop-down

Most Visited Maximum # of item to display: Sets how many items the user sees in the Most Visited drop-down

Most Visited # of days to be considered: Sets how far back the count goes for Most Visited

Most Recent Maximum # of items to display: Sets number of items to display in the Most Recent drop-down

Display Favorites: Controls Favorites drop-down

Display Labels of Navigation Buttons: Most Visited, Most Recent, and Favorites buttons.

Display Module Icons – Visibility of module icons in the taskbar

- Changes to Navigation Preferences will not be visible until the user logs out and then logs back in.

Timesheets

- Direct Service (non-administrative) staff Timesheet access. Opens in the current calendar week.

Staff Non-Client Services

- Non-billable service entries will show here. Records cannot be edited from here, but they can be deleted in cases of entry error. This is handy when needing to delete a non-billable service entry error that isn’t easily accessible through the Timesheets due to the date.
  
  o Paid services (captured in a payroll batch/run) cannot be fully deleted. The system will automatically prompt the user to “mark as delete.” Services marked as delete are rendered inactive and displayed with a line through them.
Alerts and Messaging

Alerts provide the ability of internal messaging. Staff are able to send internal alerts within Evolv.

- Users can access alerts by clicking the button in the Taskbar.

- Supervisors can access alerts by clicking the button or the button in the Taskbar and then going to the Alerts tab in the Supervisor Module.

- Alerts are also accessible in the Alerts pane on the left side of the screen.

- The selection menu allows the user to switch boxes.
Creating a New Alert

Alerts can be created in 3 ways:

1. To specific staff
2. To all staff logged into the system (controlled by permissions – not all staff have this ability)
3. To all staff (controlled by permissions – not all staff have this ability)

- **Sender**: name of user currently logged in
- **Priority**: if High Importance is selected, a red exclamation mark will appear next to the alert in the recipient’s inbox
- **Subject**: what the alert is regarding
- **Recipients**: individual staff or Workgroups can be entered (depending on permissions and availability)
- **Message**: the body of the alert

Reading an Alert

In addition to the 2 areas covered in the previous section, incoming alerts are also accessible in the user’s myEvolv interface.

- All unread messages will appear in bold.
- Click the Refresh button to see new alerts.
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- To read an alert, click on the subject line for the alert to launch the Alerts.
- Upon opening an alert, users can Print, Respond, View in a New Window or Delete.
- Deleted alerts cannot be recalled.

**Calendars**

Users can view, add and delete scheduled events/services.

- Calendar view options are Monthly, Weekly or Daily View.
- Events on a calendar will display in 1 of 3 colors:
  - **Black** – event is completed
    - completed system events cannot be modified from the calendar
    - completed user defined events can be modified from the calendar
  - **Red** – event is due/past due
    - can be completed from the calendar
  - **Blue** – event is scheduled to occur on that day
    - can be completed from the calendar