

# CREATING AN EVOLV CLIENT CHART

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2023



# PREREQUISITES

- Introduction to Evolv
- Basic understanding of Evolv navigation and common terms
- Knowledge of how to follow an Evolv breadcrumb



# GOALS & OBJECTIVES

## Goal:

Staff will understand the **three different ways to create** a Client Chart in Evolv, including where to document the new information.

## Objectives:

- 1.** Staff will be familiar with how to create a new Client Chart **from an Accepted Referral Chart**
- 2.** Staff will be familiar with how to enroll a patient into a New Program **on their Existing Evolv Client Chart**
- 3.** Staff will be familiar with how to create a **new Client Chart when there is no Referral Chart**
- 4.** Staff will be familiar with all the areas required for entering information into the Client Chart



**CREATING A CLIENT CHART  
FROM AN ACCEPTED  
REFERRAL**

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

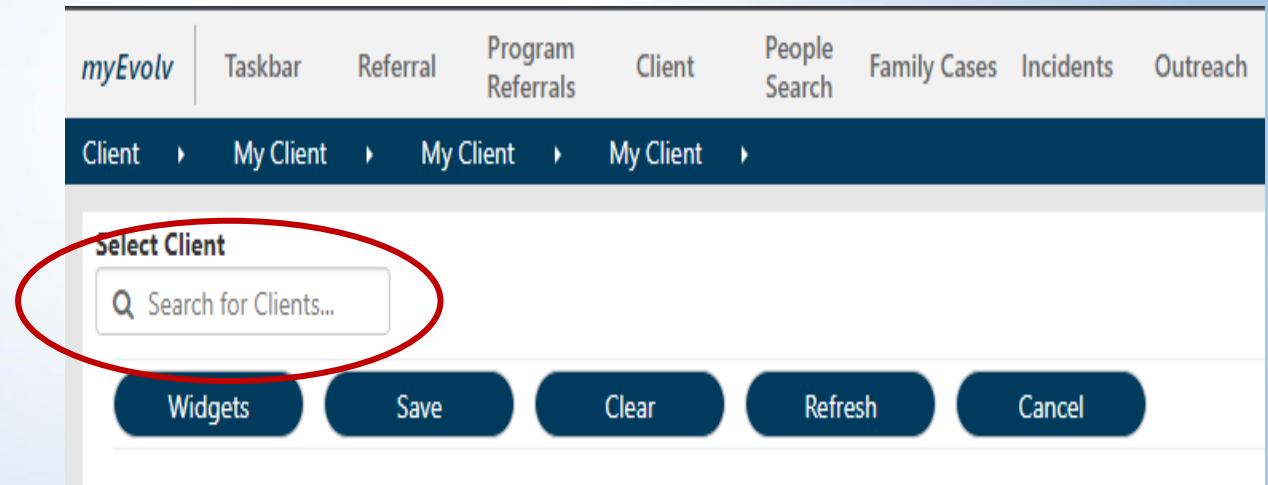
## Search for your patient in Client Module

- Click in the “Select client” field.
- Enter your search term

You may search by:

- Last Name
- First Name
- Middle Name
- AKA/Alias
- Date of Birth
- SS#
- ID#
- Medicaid#
- And other search terms

- Press “Enter”



The screenshot displays the myEvolv software interface. At the top, there is a navigation bar with the following tabs: myEvolv, Taskbar, Referral, Program Referrals, Client, People Search, Family Cases, Incidents, and Outreach. Below this, a breadcrumb trail shows: Client > My Client > My Client > My Client >. The main content area is titled "Select Client" and features a search input field with a magnifying glass icon and the placeholder text "Search for Clients...". This search field is circled in red. Below the search field are five buttons: Widgets, Save, Clear, Refresh, and Cancel.

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

- Review the names to see if your applicant has an existing Client Chart
- If the name appears, click on it to open their existing Client chart – This will be covered later in this training

**If the name DOES NOT appear in the list, close the window and follow the next steps**

The screenshot shows a 'CLIENT SEARCH' window with a search bar containing 'test'. Below the search bar are various filter fields: Last Name, First Name, Middle Name, AKA/Alias, DOB, SS#, ID#, Other ID#, Medicaid #, TABS ID, Education ID, and IBHIS ID. There is also an 'Active Clients' checkbox. Below the filters is a table of search results.

Name	DOB/Age	Address	Other IDs	Intake Date	Discharge Date
Rousseau (MSDP Test), Esther <i>Client # 0000953</i>	DOB: 09/08/1980 43 Yrs Female	1 Earl st, BOSTON, MA 02125 Mobile Phone: (617) 888-8985	Medicaid: 7272722	11/01/2017	
test, ana <i>Client # 00004705</i>	Female	Address Not Found...		08/11/2023	
Test, Elmo <i>Client # 00004025</i>	Did Not Disclose	Address Not Found... Day Phone:		07/28/2022	
Test, Juan <i>Client # 0000760</i>	DOB: 07/25/1982 41 Yrs Male	Facility: Conexiones - Clinical Stabilization Services (CSS1) - 365 East St, TEWKSBURY, MA 01876-1950 Day Phone: (919) 616-7952 Mobile Phone: (919) 616-7952	Medicaid: 110000000000000000 (End Date 06/18/2020)	07/01/2016	
Test, Juan <i>Client # 00004872</i>	DOB: 10/26/2000 23 Yrs Male	BOSTON, MA 02119		10/26/2023	

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

We found no search results in the Client Module, so now we will search the Referral Module to see if this person has a Referral Chart

Navigate to:

Referral > Referrals Made > To Programs > Referral Information >

If the person has NO Client Chart...

- Click “Referrals”
- Click “Referrals Made” > Scroll over to “To Programs”
- Click “Referral Information”
- Click in the “Select Referral” box

Search for your applicant

The screenshot displays the myEvolv software interface. The top navigation bar includes 'myEvolv', 'Taskbar', 'Referral', 'Program Referrals', 'Client', 'People Search', 'Family Cases', 'Incidents', 'Outreach', and 'Groups'. The 'Referral' tab is highlighted with an orange circle. Below the navigation bar, the 'Agency Referral' section is visible, with 'Referrals Made' highlighted by a red circle. To the right, the 'To Programs' section is highlighted with a green circle, and 'Referral Information' is also highlighted with a green circle. Below this, the 'Select Referral' section is shown, with a search box containing 'Search for Referrals...' highlighted by a blue circle. The interface also includes buttons for 'Add New', 'Print', 'Filter', 'Clear Filter', and 'Refresh', along with a 'Display Top' dropdown set to '100'. The bottom of the screen shows a table header with columns for 'Entered With', 'Referral Date-Time', and 'Referral'.

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL



➤ If their name **DOES** appear in the search results, look to the **far-right column** to double check whether they already have a Client Chart or only have a Referral Chart

**REFERRAL SEARCH**

test,juan

Last Name  First Name  AKA/Alias  DOB  SS#  Referral Source

Referral ID#  Office Responsible  Priority  TABS ID  Education ID  Has client record?

Name	DOB/Age	Address	Referral Source/Date	Office Responsible/Priority	Has Client Record
 <b>Test, Juan</b> <i>Referral ID: 0000005823</i>	DOB: 07/25/1982 41 Yrs Male	Facility: Conexiones- Clinical Stabilization Services (CSS1) - 365 East St, TEWKSBURY, MA 01876-1950 Day Phone: 9196167952 Mobile Phone: 9196167952	Source: Lowell General Hospital Referral Date: 03/01/2022	Office Responsible: Conexiones- Clinical Stabilization Services	<input checked="" type="checkbox"/>
 <b>Test, Juan</b> <i>Referral ID: 0000000714</i>	DOB: 07/25/1982 41 Yrs Male	Facility: Conexiones- Clinical Stabilization Services (CSS1) - 365 East St, TEWKSBURY, MA 01876-1950 Day Phone: 9196167952 Mobile Phone: 9196167952	Source: High Point Treatment Center Outpatient Referral Date: 07/17/2017	Office Responsible: RESI - Latinas y Ninos Center Priority: Pregnant/Postpartum (Care and Custody)	<input checked="" type="checkbox"/>

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

When the chart opens you may see they have a referral to one program  
**OR** more than one program

TEST, JUAN | DOB 07/25/1982 | Medicaid 1100000000000000 (End Date 06/18/2020) | Referral Source Lowell General Hospital | Referral Date 03/01/2022 | Location Conexiones- Clinical Stabilization Services (CSS1) - 365 East St, TEWKSBURY, MA 01876-1950

Referral Information | Referral Face Sheet

Add New | Print | Filter | Clear Filter | Refresh | Display Top 100

Entered With	Referral Date-Time	Referral To Agency	Program Referred To	Program Modifier	Facility	Status
Referrals to the Agency - 03/01/2022 03:58pm	04/21/2021 03:58 PM	Lowell General Hospital - 03/01/2022	Conexiones - Clinical Stabilization Service		<a href="#">Conexiones- Clinical Stabilization Services (Lic.# CSS1)</a>	Modifiable

Actions

- Open Form
- Delete Record
- Add Notes

- Click the “Action” button
- Click “Open Form”

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

- Scroll Down to “Referral Status”
- Update the status to “Accepted”
- Once the “Referral Status” has been updated
- Click “Save”

Referral to Program from Outside Source [EDIT]

Client: Test, Juan DOB: 07/25/1982 ID# 00000760 Intake: 07/01/2016 02:04pm

Save Cancel Delete Print Send Alert History Refresh Form Info

Click to open window Click here to open window

Dates

Referral Information

Recommendation

LACDMH Connection

Referral Status

Referral link to

**Referral Status**

Status of the Referral\*

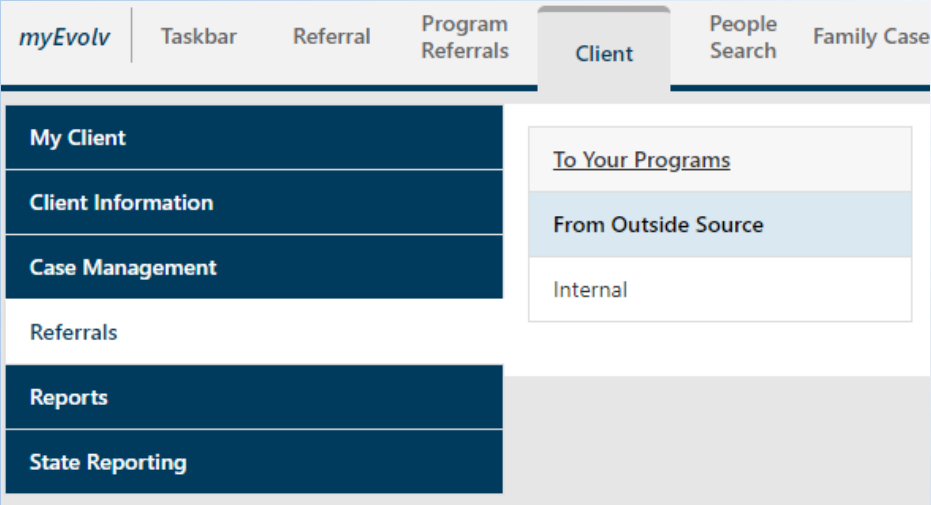
Status*	Effective Date-Time*	Reason for Status	Remarks	Actions
▼ DENIED - Denied Admission	03/01/2023 Time: 04:00 PM	13 - Barred from program/campus for safety		Actions
➕ ACCEPT - Accepted	11/16/2023 Time: 10:00 AM	IS - Intake scheduled		Actions
➕				Actions

⚠ **ALWAYS** update by adding a new status under the existing one

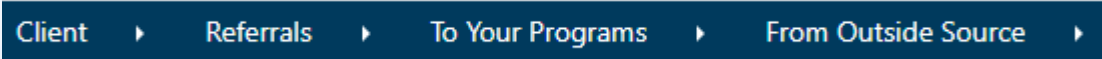
⚠ **NEVER** delete or write over the existing status

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

Now that the person's Referral Chart has a status of "Accepted" for your program you will be able to Create a Client Chart from the Accepted Referral Chart



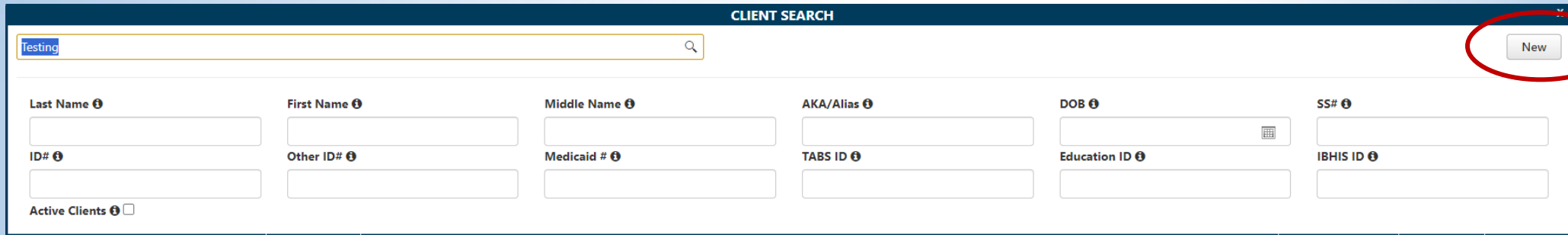
Navigate to



Search for your Client

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

Click “New” the People Wizard will open  
Click “Intake-Referral”

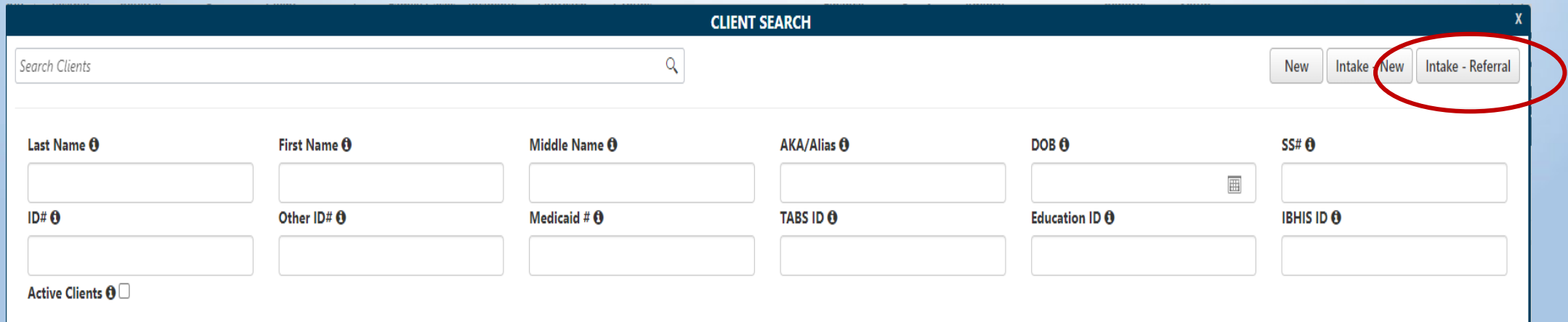


CLIENT SEARCH

Testing

New

Last Name ⓘ First Name ⓘ Middle Name ⓘ AKA/Alias ⓘ DOB ⓘ SS# ⓘ  
ID# ⓘ Other ID# ⓘ Medicaid # ⓘ TABS ID ⓘ Education ID ⓘ IBHIS ID ⓘ  
Active Clients ⓘ



CLIENT SEARCH

Search Clients

New Intake New Intake - Referral

Last Name ⓘ First Name ⓘ Middle Name ⓘ AKA/Alias ⓘ DOB ⓘ SS# ⓘ  
ID# ⓘ Other ID# ⓘ Medicaid # ⓘ TABS ID ⓘ Education ID ⓘ IBHIS ID ⓘ  
Active Clients ⓘ

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

- Search for your Client
- Click the Client name

Accepted Referrals

Last Name First Name SSN DOB Referral Source Referral to Program Modality

Has Client Record Is Open

Search Clear Reset

Name	DOB	Referral Source	Referral to Program	Modality	Has Client Record	Is Open
Giardina, Jennifer	12/07/1978	Brigham and Womans Hospital	Conexiones - Clinical Stabilization Service, Fac: Conexiones- Clinical Stabilization Services, 08/20/2023	Substance Abuse Education	no	yes
Testing, 1175	12/07/1978	Addison Gilbert Hospital	FUOP- Familias Unidas Outpatient Program, Fac: Familias Unidas Outpatient Programs (FUOP), 02/07/2024		no	yes

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

The “Initial Enrollment from Accepted Referral” Form will open  
Enter fields as follows:

Field	Entry
Intake Date-Time	Actual Intake Date & Time
Initial Facility	Click the button, enter % into the search field. You should only get your program as a result. Select your program
Unit	Select to room or bed the client will be assigned to. <i>If this is a FUOP chart there will be appropriate selections</i>
Child of Placed Client	Check this checkbox if this chart is the child of a Latinas Patient <input data-bbox="1989 935 2339 1053" type="checkbox"/>
Initial Program Enrollment Modifier	If this is a Latinas Patient, one of the Modifiers may be applicable to your patient

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

Initial Enrollment from Accepted Referral [ADD]

Testing, 1175 DOB: 12/07/1978 Gender: Female

Save Cancel Print Form Info

### Agency Placement

<b>Agency*</b> Casa Esperanza	<b>Referral*</b> FUOP- Familias Unidas Outpatient Prog...	<b>Person</b> Testing, 1175	<b>Other Id#</b>
<b>Intake Date-Time*</b> 02/07/2024 07:00 AM	<b>IPD</b>	<b>Worker of Record</b> Vaughn, January J.	

### Initial Placement

<b>Opening Reason</b> code	<b>Initial Program*</b> FUOP- Familias Unidas Outpatient Prog...	<b>Placement Type*</b> FP Facility Placement	<b>Initial Facility*</b> 4T7W Familias Unidas Outpatient ...
<b>Unit*</b> 1 FD 1 FRONT DESK	<b>Bed</b>	<b>Grade</b> code	<b>Schedule of Sessions*</b>
<b>Child of Placed Client</b> <input type="checkbox"/>	<b>Prior Difficulties</b> <input type="checkbox"/>	<b>Transferred from another HCI Agency (NYS)</b> <input type="checkbox"/>	<b>Bridges to Health Foster Care Status (NYS)</b> <input type="checkbox"/>
<b>Initial Cost Center Override</b> code	<b>Initial Program Unit Override</b>	<b>Living Arrangement Type</b> code	

### Initial Program Enrollment Modifier

<b>Modifier</b> code	<b>Effective Date*</b>	<b>Date Received</b>	<b>Expiration Date</b>
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# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

## Initial Primary Worker

Primary Worker & Worker Role: The worker who has primary responsibility for the Client. *This can be altered later if necessary*

- At Residential this will be the Treatment Coordinator
- At CSS this will be the Counselor
- At FUOP this will be the Clinician

You can assign **Other Worker Assignments** and **Workgroups** at this time *(and/or later)*

- This may be a Case Manager, Recovery Coach, or other staff that is known to be assigned to the case

Initial Enrollment from Accepted Referral [ADD]

Testing, 1175 DOB: 12/07/1978 Gender: Female

Save Cancel Print Form Info

Agency Placement

Initial Placement

Initial Program Enrollment Modifier

Initial Primary Worker

Other Worker Assignments

Enroll into Support Group

Funding Information

Diagnosis

Initial Primary Worker

Worker\* Worker Role\*

Vaughn, January J. Case Manager

Other Worker Assignments

Worker*	Worker Role*	Actions
+ Richardson, Holly G. (System Administrator)	Clinical Staff	Actions
+		Actions

Workgroup Assignments

Workgroup*	Actions
+ Internal Referral (Casa Esperanza)	Actions
+	Actions

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

## Enroll into Support Group

This is where you can enroll the client into Support Groups at this time

## Funding Information

This is where you can enter the benefit assignment at this time

*There will be a separate, more in-depth training about Support Group Enrollment and Benefit Assignments at a later date*

### Enroll into Support Group

Enroll into :Support Group

Support Group*	Unit/Class*	Schedule*	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	Actions

### Funding Information

Benefits on File

Sequence	priority	Priority	Coverage Type	Payer/Plan	Policy#	Coverage Start Date	Coverage End Date	Custom Code 1
----------	----------	----------	---------------	------------	---------	---------------------	-------------------	---------------

Refresh

Benefits with Defaults

Priority*	Billing Sequence*	Type of Coverage*	Payor*	Plan*	Policy number	Coverage Start Date*	Relationship*	Allowed to Release Info	Release of Info Code	* Patient Signature Source	Actions
9 - Other	1	OT - Other						<input checked="" type="checkbox"/>	Y - Signed Stat	B - Signed signi	Actions

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

## Diagnosis

You must enter a Diagnosis and Diagnosis Priority

**Diagnosis**

On File

Axis	Date	Priority	Priority Description	Diagnosis	DSMIV	ICD9	ICD10	ICD10 Term	DSMV Term	GAF Score	SNOMED Code	SNOMED Term
1	02/02/2009 12:00 AM	1	Primary	Substance or medication-induced psychotic disorder; ICD9: 292.9; ICD10: F19.959; SNOMED: 69322001; DSM5 Term: Other (or unknown) substance-induced psychotic disorder, without use disorder		292.9	F19.959	Other psychoactive substance use, unspecified with psychoactive substance-induced psychotic disorder	Other (or unknown) substance-induced psychotic disorder, without use disorder		69322001	Psychotic disorder

Refresh

Axis I\* **Axis I is required.**

Diagnosis*	Diagnosis Priority*	Date Diagnosed	End date	Actions
+ Substance or medication-induced psychotic disorc	1 - 1 - Primary			Actions
+				Actions

Click "Save"

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

## FUOP Adds an Additional Program

If you are a FUOP staff - once the patient is enrolled in your program, you must follow this additional step:

- Going forward all FUOP Patients will be enrolled in the “FUOP” Program **AND** the “Integrated Care Plan” Program
- This will enable staff to create an Integrated Care Plan for the Client

Follow the steps in the section “Create a New Program Enrollment on the Existing Client Chart” of this slide deck to add the enrollment

# CREATE A CLIENT CHART FROM AN ACCEPTED REFERRAL

The Patient now has a Client Chart, and we can bill for this person.

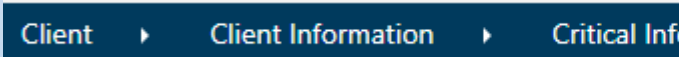
You may review and update the patient's previously entered information by going to the following breadcrumbs:

- Demographics [Client](#) ▶ [Client Information](#) ▶ [Personal Information](#) ▶ [Demographics](#) ▶
- Allergies [Client](#) ▶ [Client Information](#) ▶ [Health Information](#) ▶ [Allergies](#) ▶
- Adding Alert Flags [Client](#) ▶ [Client Information](#) ▶ [Critical Information](#) ▶ [Alerts/Restrictions](#) ▶
- Priority Status [Client](#) ▶ [Client Information](#) ▶ [Personal Information](#) ▶ [Eligibilities / Classifications](#) ▶
- Collateral Relationships [Client](#) ▶ [Client Information](#) ▶ [Relationships](#) ▶ [Collaterals](#) ▶
- Diagnosis [Client](#) ▶ [Client Information](#) ▶ [Health Information](#) ▶ [Diagnosis - Active](#) ▶
- Medications [Client](#) ▶ [Client Information](#) ▶ [Health Information](#) ▶ [Medications](#) ▶

**CREATING A NEW PROGRAM  
ENROLLMENT ON AN EXISTING  
CHART**

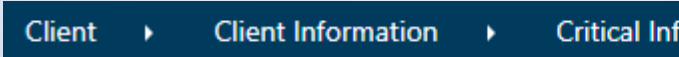
# CREATING A NEW PROGRAM ENROLLMENT ON AN EXISTING CLIENT CHART

If you have searched for the Patient and found that s/he has an existing Client chart, follow the steps below to **add a program enrollment for YOUR PROGRAM onto their chart:**

- Navigate to the Client Module
- Click on “Select Client”
- Search for your patient
- Click on their name to open their chart
- Navigate to 

# CREATE A NEW PROGRAM ENROLLMENT

If you have searched for the Patient and found that s/he has an existing Client chart, follow the steps below to **add a program enrollment for YOUR PROGRAM onto their chart:**

- Click in the “Select Client” box
- Search for your patient
- Click on their name to open their chart
- Navigate to 

# CREATE A NEW PROGRAM ENROLLMENT

The **Enrollment Information** page will show you all Program Enrollments this Patient has ever had with Casa. *(since recording enrollments in Evolv)*

You see:

- Program
- Worker Assignments
- Enrollment and Discharge Dates

Agency: Casa Esperanza	Intake: 07/01/2016 02:04pm	Start Date	End Date
Current Location: Facility: Conexiones- Clinical Stabilization Services (CSS1) - 365 East St, TEWKSBURY, MA 01876-1950			
Program: <b>ATS</b>		10/12/2023 11:55am	
Facility Providers:			
Conexiones- Clinical Stabilization Services (Lic.# CSS1) Unit: F 208		10/12/2023 11:55am	
Worker Assignments:			
Barrett, Shannon Role: Director/Manager Clinical		10/12/2023 11:55am	
Workgroup Assignments:			
ATS - Direct Care Workgroup		10/12/2023 11:55am	
Program: <b>FUOP- Familias Unidas Outpatient Program</b>		02/23/2023 11:35am	
Facility Providers:			
Familias Unidas Outpatient Programs (FUOP) (Lic.# 4T7W) Unit: EXAM ROOM #1		02/23/2023 11:35am	
Worker Assignments:			
Richardson, Holly G. Role: Director/Manager Clinical		02/23/2023 11:35am	
Workgroup Assignments:			
CasaCare Medical Team - Direct Care Workgroup		02/23/2023 11:35am	
FUOP Staff - Direct Care Workgroup		02/23/2023 11:35am	


# CREATE A NEW PROGRAM ENROLLMENT

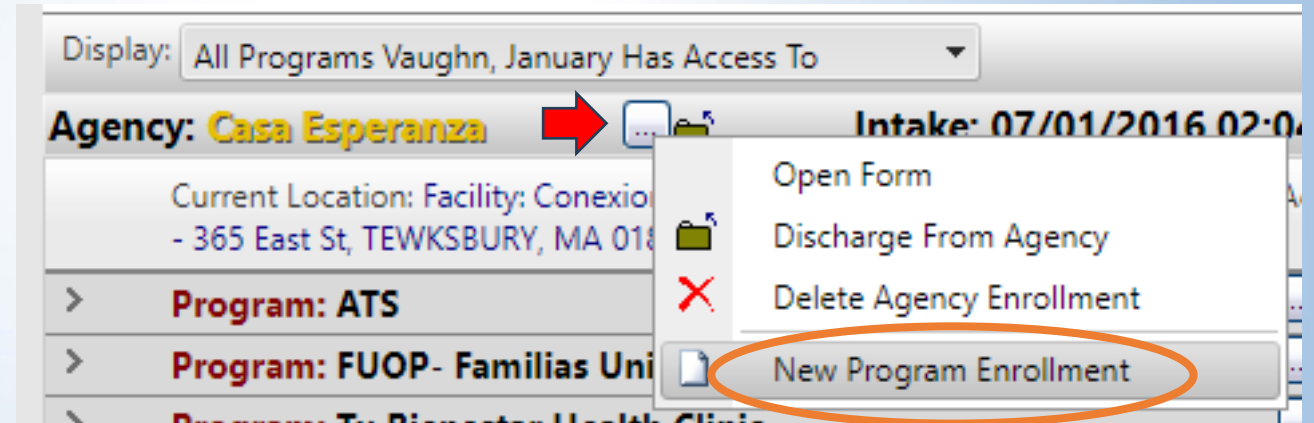
The “Enrollments Information” page is divided by colored bars to indicate “Agency” and “Program”

*By clicking the “caret” next to each program, you can expand or collapse that program information*

Enrollment Information		Advanced & Safety Plan/Contract	Placement Disruptions	Treatment Phases	Worker Assignments
Display: All Programs Vaughn, January Has Access To					
<b>Agency: Casa Esperanza</b>		<b>Intake: 07/01/2016 02:04pm</b>			
Current Location: Facility: Conexiones- Clinical Stabilization Services (CSS1) - 365 East St, TEWKSBURY, MA 01876-1950		Actions	Start Date	End Date	
▼ <b>Program: ATS</b>		...	10/12/2023 11:55am		
<b>Facility Providers:</b>					
Conexiones- Clinical Stabilization Services (Lic.# CSS1) Unit: F 208		...	10/12/2023 11:55am		
<b>Worker Assignments:</b>					
<b>Barrett, Shannon Role: Director/Manager Clinical</b>		...	10/12/2023 11:55am		
<b>Workgroup Assignments:</b>					
ATS - Direct Care Workgroup		...	10/12/2023 11:55am		
▼ <b>Program: FUOP- Familias Unidas Outpatient Program</b>		...	02/23/2023 11:35am		
<b>Facility Providers:</b>					
Familias Unidas Outpatient Programs (FUOP) (Lic.# 4T7W) Unit: EXAM ROOM #1		...	02/23/2023 11:35am		
<b>Worker Assignments:</b>					
<b>Richardson, Holly G. Role: Director/Manager Clinical</b>		...	02/23/2023 11:35am		
<b>Workgroup Assignments:</b>					
CasaCare Medical Team - Direct Care Workgroup		...	02/23/2023 11:35am		
FUOP Staff - Direct Care Workgroup		...	02/23/2023 11:35am		

# CREATE A NEW PROGRAM ENROLLMENT

- Click on the Menu button on the “Agency” bar 
- This will open a dropdown menu
- Select “New Program Enrollment”
- The “Program Enrollment Form” will open



# CREATE A NEW PROGRAM ENROLLMENT

➤ Complete the fields as follows:

Field	Entry
Program	Your Program
Start Date / Time	Actual Date and Time of Enrollment
Placement Type	All programs choose “Facility Placement” *Except SOAP – SOAP will choose “Attendance Enrollment”
Service Facility	This will have only one option, based on the Placement Type you selected
Unit	Select to room or bed the client will be assigned to If this is a FUOP chart there will be appropriate selections
Child of Placed Client	Check this checkbox if this chart is the child of a Latinas Patient <input data-bbox="2015 1008 2270 1096" type="checkbox"/>
Initial Program Enrollment Modifier	If this is a Latinas Patient, one of the Modifiers may be applicable to your patient

# CREATE A NEW PROGRAM ENROLLMENT

Program Enrollment From Service Track [ADD]

Client: Test, Juan DOB: 07/25/1982 ID# 00000760 Intake: 07/01/2016 02:04pm

Save Cancel Print Form Info

### Enrollment Information

<b>Agency Placement*</b> Casa Esperanza - from 07/01/2016 to	<b>Program*</b> code	<b>Start Date-Time*</b> [Date Picker]	<b>Program ID#</b> [Text Field]
<b>Target Discharge</b> [Date Picker]	<b>Opening Reason</b> code	<b>Staff Responsible</b> Vaughn, January J.	<b>Referral</b> [Text Field]
<b>Actual Discharge Date</b> [Date Picker]	<b>Cost Center Override</b> code	<b>Program Unit Override</b> [Text Field]	

### Service Facility Placement

<b>Placement Type*</b> code	<b>Managing Organization</b> [Text Field]	<b>Service Facility*</b> code	<b>Unit*</b> code
<b>Bed</b> [Text Field]	<b>Grade</b> code	<b>Schedule of Sessions*</b> [Text Field]	<b>Child of a Placed Client</b> <input type="checkbox"/>
<b>Living Arrangement Type</b> code	<b>Transferred from another HCI Agency (NYS)</b> <input type="checkbox"/>	<b>Bridges to Health Foster Care Client (NYS)</b> <input type="checkbox"/>	

### Program Enrollment Modifier

<b>Modifier</b> code	<b>Effective Date*</b> [Date Picker]	<b>Date Received</b> [Date Picker]	<b>Expiration Date</b> [Date Picker]
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- Enrollment Information
- Service Facility Placement
- Program Enrollment Modifier
- Worker Assignments
- Support Group Enrollment
- Additional Information

# CREATE A NEW PROGRAM ENROLLMENT

## ➤ Click “Primary Worker”

- Select the worker who will have primary responsibility for the Client.

*This can be altered later if necessary.*

- At Residential this will be the Treatment Coordinator
- At CSS this will be the Counselor
- At FUOP this will be the Clinician

## ➤ Click on Primary Worker’s Role

- Select the role of the staff person you entered in the field above

## ➤ At the top of the page, click “Save”

Your Program will now show in the list of Program Enrollments on the Patient’s Chart

# CREATE A NEW PROGRAM ENROLLMENT

Program Enrollment From Service Track [ADD]

Client: Test, Juan DOB: 07/25/1982 ID# 00000760 Intake: 07/01/2016 02:04pm

**Save** **Cancel** **Print** **Form Info**

### Worker Assignments

**Primary Worker\***

**Primary Worker's Role\***

Enrollment Information

Service Facility Placement

# CREATE A NEW PROGRAM ENROLLMENT

## FUOP Adds an Additional Program

If you are a FUOP staff - once the patient is enrolled in your program, you must follow this additional step:

- Going forward all FUOP Patients will be enrolled in the “FUOP” Program **AND** the “Integrated Care Plan” Program
- This will enable staff to create an Integrated Care Plan for the Client

Follow the steps in the section “Create a New Program Enrollment on the Existing Client Chart” of this slide deck to add the enrollment

**CREATE A NEW CLIENT CHART –  
When there is no existing Client  
Chart or Referral Chart**

# CREATE A NEW CLIENT CHART

## Search for your patient

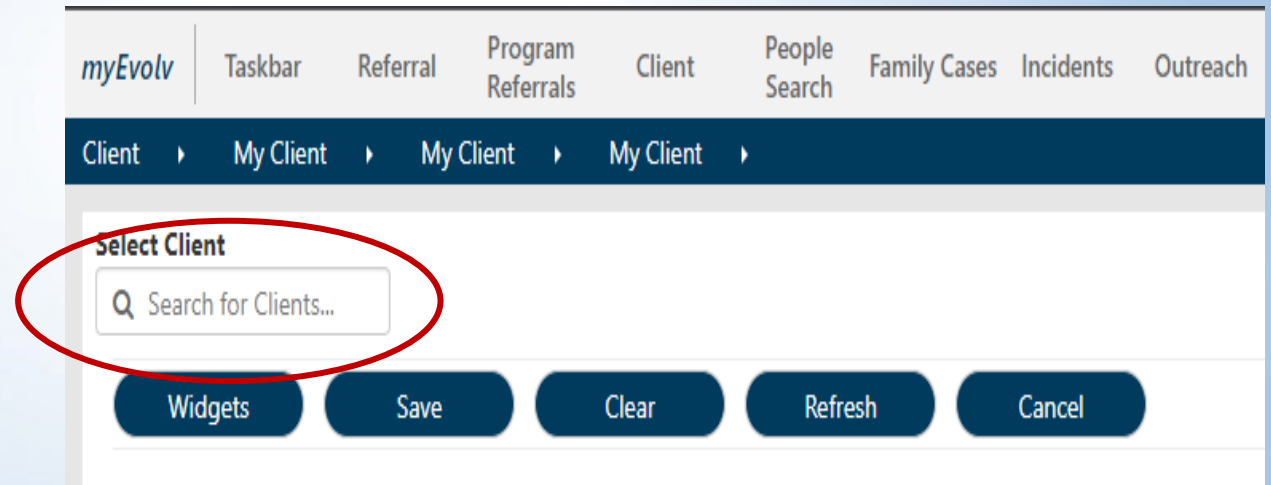
- Click in the “Select client” field.
- Enter your search term

You may search by:

- Last Name
- First Name
- Middle Name
- AKA/Alias
- Date of Birth
- SS#
- ID#
- Medicaid#
- And other search terms

- Press “Enter”

We are going to search the system to find out if the patient already has a chart in the system



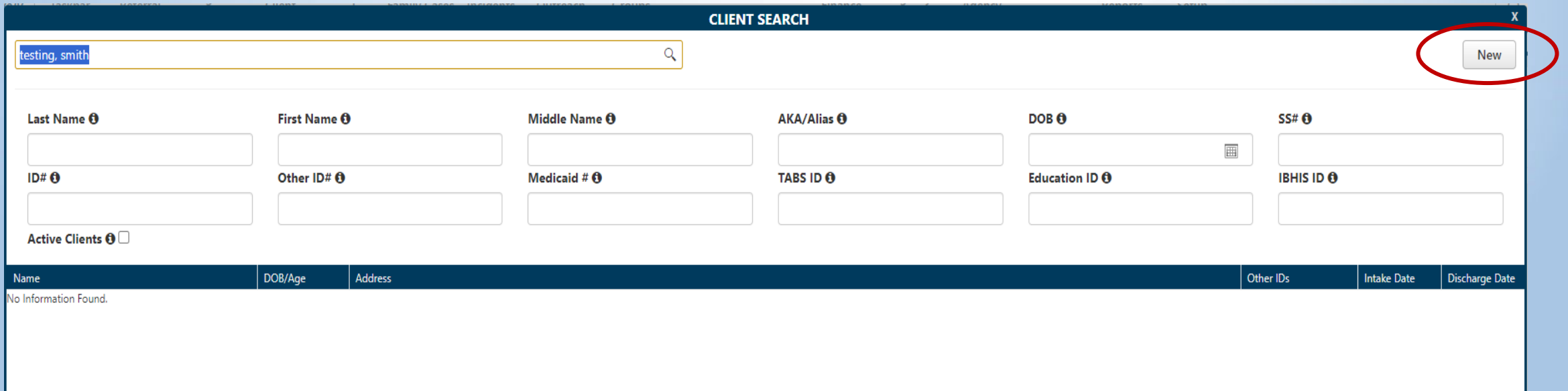
The screenshot shows the myEvolv web application interface. At the top, there is a navigation bar with the myEvolv logo and several menu items: Taskbar, Referral, Program Referrals, Client, People Search, Family Cases, Incidents, and Outreach. Below the navigation bar, there is a breadcrumb trail: Client > My Client > My Client > My Client >. The main content area is titled "Select Client" and features a search input field with a magnifying glass icon and the placeholder text "Search for Clients...". This search field is circled in red. Below the search field, there are five buttons: Widgets, Save, Clear, Refresh, and Cancel.

**IMPORTANT:** Please keep in mind that some of our clients may have changed some of their information, such as **NAME** or **GENDER** since their last stay. In these cases, **Social Security Number** is a good search criteria.

# CREATE A NEW CLIENT CHART

- Review the names to see if your applicant has an existing Client Chart
- If the name appears, click on it to open their existing Client chart – This was covered previously in the training

**If the name DOES NOT appear in the list, Click “NEW”**



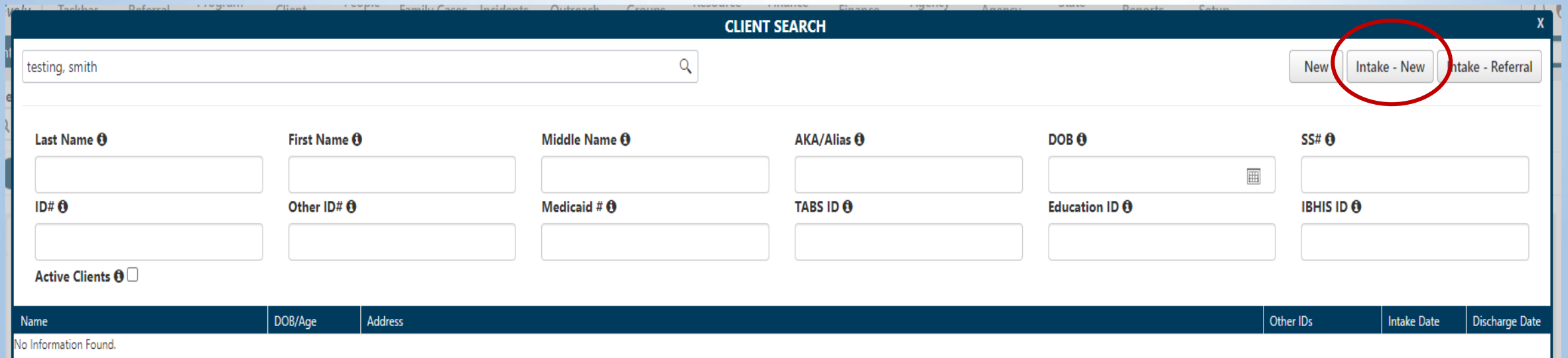
The screenshot displays the 'CLIENT SEARCH' interface. At the top, there is a search bar containing the text 'testing, smith' and a magnifying glass icon. To the right of the search bar is a 'New' button, which is circled in red. Below the search bar, there are several input fields for client information, each with a help icon (i):

Last Name	First Name	Middle Name	AKA/Alias	DOB	SS#
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ID#	Other ID#	Medicaid #	TABS ID	Education ID	IBHIS ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Below the input fields, there is a checkbox labeled 'Active Clients' which is currently unchecked. At the bottom of the interface, there is a table with columns: Name, DOB/Age, Address, Other IDs, Intake Date, and Discharge Date. The table is currently empty, displaying 'No Information Found.'

# CREATE A NEW CLIENT CHART

Click “Intake-New”  
This will open the Intake Wizard



The screenshot shows a web application window titled "CLIENT SEARCH". At the top, there is a search bar containing the text "testing, smith" and a magnifying glass icon. To the right of the search bar are three buttons: "New", "Intake - New", and "Intake - Referral". The "Intake - New" button is circled in red. Below the search bar, there are several input fields arranged in a grid. The first row contains fields for "Last Name", "First Name", "Middle Name", "AKA/Alias", "DOB" (with a calendar icon), and "SS#". The second row contains fields for "ID#", "Other ID#", "Medicaid #", "TABS ID", "Education ID", and "IBHIS ID". Below these fields is a checkbox labeled "Active Clients". At the bottom of the window, there is a table header with columns: "Name", "DOB/Age", "Address", "Other IDs", "Intake Date", and "Discharge Date". The table content area below the header displays "No Information Found."

# CREATE A NEW CLIENT CHART

- Enter the search criteria
- Click “Proceed”

The screenshot displays a web application window titled "Wizard Process - Intake". The interface features a top navigation bar with four tabs: "Search" (active), "Results", "Personal Information", and "Intake Information". Below the navigation bar, there are "Previous" and "Proceed" buttons, and a "Cancel" button in the top right corner. The main content area is divided into two sections: "Agency Information" and "Person".

**Agency Information**

Agency\*  
Casa Esperanza

**Person**

Enter as much information as possible. This is not a search screen and requires you to enter complete information.

Anonymous

AKA

Social Security Number  
555-12-3456

Last Name\*  
Testing

Maiden Name

TABS ID

First Name\*  
Smith

Gender\*  
F Female

Education ID


Middle Name

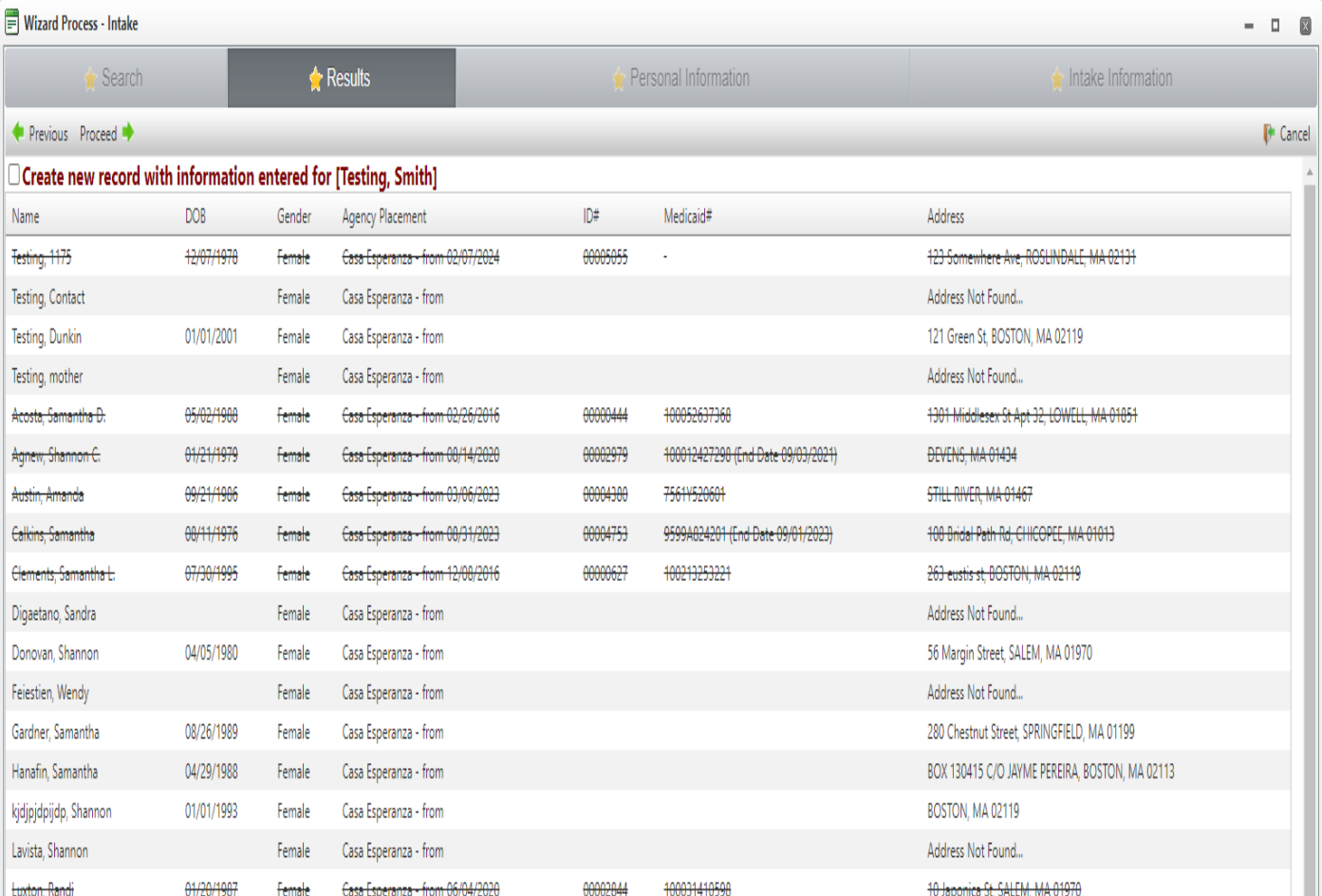
Date of Birth  
01/06/1988

# CREATE A NEW CLIENT CHART

The system shows results that **may match** your search (the system requires this second search to prevent creating a duplicate chart by mistake)

- Check carefully for the person you are searching for
- If you see the person, you are searching for in the results, click on that name
- **If you do NOT see the person you are searching for, click “Create new record...” box**
- **This is the step we are following in this training**
- Then click “Proceed”

Proceed 



The screenshot shows a software window titled "Wizard Process - Intake" with a navigation bar containing "Search", "Results", "Personal Information", and "Intake Information". Below the navigation bar are "Previous" and "Proceed" buttons. A red arrow points to a checkbox labeled "Create new record with information entered for [Testing, Smith]". Below this is a table of search results.

Name	DOB	Gender	Agency Placement	ID#	Medicaid#	Address
Testing, 1175	12/07/1970	Female	Casa Esperanza - from 02/07/2024	00005055	-	123 Somewhere Ave, ROSLINDALE, MA 02131
Testing, Contact		Female	Casa Esperanza - from			Address Not Found..
Testing, Dunkin	01/01/2001	Female	Casa Esperanza - from			121 Green St, BOSTON, MA 02119
Testing, mother		Female	Casa Esperanza - from			Address Not Found..
Acosta, Samantha-D.	05/02/1980	Female	Casa Esperanza - from 02/26/2016	00000444	100052037360	1301 Middlesex St Apt 32, LOWELL, MA 01851
Agnew, Shannon-C.	01/21/1979	Female	Casa Esperanza - from 00/14/2020	00002979	100012427290 (End Date 09/03/2021)	DEVENS, MA 01434
Austin, Amanda	09/21/1986	Female	Casa Esperanza - from 03/06/2023	00004300	75611520001	5TILL RIVER, MA 01467
Calkins, Samantha	00/11/1976	Female	Casa Esperanza - from 00/31/2023	00004753	9599A024201 (End Date 09/01/2023)	100 Bndal Path Rd, CHICOPEE, MA 01013
Clements, Samantha-L.	07/30/1995	Female	Casa Esperanza - from 12/00/2016	00000627	100213253221	263 eustis st, BOSTON, MA 02119
Digaetano, Sandra		Female	Casa Esperanza - from			Address Not Found..
Donovan, Shannon	04/05/1980	Female	Casa Esperanza - from			56 Margin Street, SALEM, MA 01970
Feiestien, Wendy		Female	Casa Esperanza - from			Address Not Found..
Gardner, Samantha	08/26/1989	Female	Casa Esperanza - from			280 Chestnut Street, SPRINGFIELD, MA 01199
Hanafin, Samantha	04/29/1988	Female	Casa Esperanza - from			BOX 130415 C/O JAYME PEREIRA, BOSTON, MA 02113
kjdjpdjpdj, Shannon	01/01/1993	Female	Casa Esperanza - from			BOSTON, MA 02119
Lavista, Shannon		Female	Casa Esperanza - from			Address Not Found..
Luxton, Randi	01/20/1987	Female	Casa Esperanza - from 06/04/2020	00002044	100031410590	10 Jacobica St SALEM, MA 01970

  Create new record with information entered for [Training, Slide]

# CREATING A REFERRAL CHART IN EVOLV

The “Intake -New” form will open “★ Personal Information”  
Enter information about the Client, including:

- Last name, First Name
- Gender
- Address Information
- Identifying Information
- Demographic Information
- Contact Information
- Language
- Education and Employment
- Family Information

Wizard Process - Intake

Search Results Personal Information Intake Information

Previous Proceed Cancel

### Name

Last Name\* First Name\* Middle Name Name Suffix

Testing Smith

Salutation AKA Maiden Name Gender\*

code AKA Maiden Name F Female

Pronoun Preference Date of Birth\* Anonymous CCD Information

code 01/06/1988  [Click to Upload Document](#)

### Address Information

Personal Address

Type	Type of Residence	ZIP Code*	Street Address 1	City*	State*	County	Address Date	Mailing Address?	GeoCode	Zipcode Zone	Actions
+ Homeless	99 - Other	02116		BOSTON	MA - Massac	SUF - -SUF		<input type="checkbox"/>			Actions
+		####-####						<input type="checkbox"/>			Actions

NOTE: There is a field for Priority Status here, but this is **NOT** the place you should enter it

# CREATE A NEW CLIENT CHART

Still in the “★ Personal Information” tab

Scroll to the bottom of the window to “Family Information”

- Here you have the option to enter family members if this information is known at the time of referral.
- Once completed Click “Proceed”

**Wizard Process - Intake**

Search Results **★ Personal Information** Intake Information

Previous Proceed Cancel

### Family Information

Family/Family Members Entered in System

Name	Relationship in family	Age
------	------------------------	-----

Refresh

Setup New Family

Testing, Smith DOB: 01/06/1988 Gender: Female

#### Family Information

Has Family?

Family Name

Relationship in Family(Self)

Live with Family (Self)

Case Holder/Head of Household (...)

Is Case?

Case Number

Case Initiation Date

#### Birth Mother

Has Birth Mother?

Last Name

First Name

DOB

Lives with Family

Case Holder/Head of Household

Family Information

- Name
- Address Information
- Emergency Contact Info
- Identifying Information
- Demographic Information
- Contact Information
- Language
- Education and Employment
- Family Information

# CREATE A NEW CLIENT CHART

Under the “★ Intake Information” tab  
Enter information about the Client,  
including:

- Agency Placement
- Referral Information / Contact
- Initial Placement
- Initial Program Enrollment Modifier
- Initial Primary Worker
- Diagnosis
- Other Worker Assignments
- How Heard of Agency
- Support Group Enrollment
- Funding Information
- Support Group

*\*These will be covered in another training*

Wizard Process - Intake

Search Results Personal Information Intake Information

Previous Finish Cancel

Testing, Smith DOB: 01/06/1988 Gender: Female

### Agency Placement

Agency\* Other Id# Intake Date-Time\* IPD

Casa Esperanza

Worker of Record

Vaughn, January J.

### Referral Information

Managing Office Responsible\* Referral Source\* Referral Contact Primary Reason for Referral\*

00001 Main Office Casa Esperanza...

Initial Contact Method

code

### Initial Placement

Opening Reason Initial Program\* Placement Type\* Initial Facility\*

code code code code

Unit\* Bed Grade Schedule of Sessions\*

code

Child of Placed Client Living Arrangement Type Prior Difficulties Transferred from another HCI Agency (NYS)

# CREATE A NEW CLIENT CHART

## Referral Information

Enter information about the Referral, including:

- a. Referral Date and Time
- b. Managing Office Responsible (your program)
- c. Referral Source\*
- d. Referral Contact\*
- e. Primary Reason for Referral

***This is ALWAYS "Substance Abuse" for Residential and CSS***

(\*instructions for this in 2 slides)

The screenshot shows a web form titled "Referral Information". It contains several input fields with search icons:

- Managing Office Responsible\***: 00001 Main Office Casa Esperanza...
- Referral Source\***: Addison Gilbert Hospital (highlighted with a red circle)
- Referral Contact\***: (empty field, highlighted with a red circle)
- Primary Reason for Referral\***: 01 Substance Abuse (highlighted with a red circle)
- Initial Contact Method**: code

# CREATE A NEW CLIENT CHART

## Instructions for adding a Referral Contact person

- Once the “Referral Source” is entered, “CLICK” on the Referral Source **name**
  - This will open the “Outside Organization Stand Alone Form”, which allows staff to add contacts to the organization
- Scroll down to “Contacts”
- Click on the binocular icon
- Search for the name of the Contact you want to add
  - The system will search to see if this person already exists in the system
- If the Contact shows up in the search list, click on their name
- If the Contact DOES NOT show up in the search list, click on the “New” button
  - This will open the “Referral Contact Personal Information” window
- Enter the required information AND enter phone number and email address
- Click “Save”
  - This will bring you back to the search window
- Click on the Contact’s name
  - This will add the Contact to the organization
- Click “Save” in the Outside Organization Stand Alone Form
- You will be brought back to the New Referral wizard.
- Click in the “Referral Contact” field.
  - This will show you all contacts associated with that organization
  - Click on the Contact you want to add

# CREATE A NEW CLIENT CHART

FIELD	ENTRY
Initial Program	Your Program
Placement Type	All Programs choose "Facility Placement" except SOAP. SOAP will choose "Attendance Enrollment"
Initial Facility	Select your Facility
Unit	Select a room or bed the client will be assigned to. If this is a FOUP Chart there will be appropriate selections.

▲ Initial Placement

<p><b>Opening Reason</b></p> <input type="text" value="code"/>	<p><b>Initial Program*</b></p> <input type="text" value="code"/>	<p><b>Placement Type*</b></p> <input type="text" value="code"/>	<p><b>Initial Facility*</b></p> <input type="text" value="code"/>
<p><b>Unit*</b></p> <input type="text" value="code"/>	<p><b>Bed</b></p> <input type="text" value=""/>	<p><b>Grade</b></p> <input type="text" value="code"/>	<p><b>Schedule of Sessions*</b></p> <input type="text" value=""/>
<p><b>Child of Placed Client</b></p> <input type="checkbox"/>	<p><b>Living Arrangement Type</b></p> <input type="text" value="code"/>	<p><b>Prior Difficulties</b></p> <input type="checkbox"/>	<p><b>Transferred from another HCI Agency (NYS)</b></p> <input type="checkbox"/>
<p><b>Bridges to Health Foster Care Status (NYS)</b></p> <input type="checkbox"/>	<p><b>Initial Cost Center Override</b></p> <input type="text" value="code"/>	<p><b>Initial Program Unit Override</b></p> <input type="text" value=""/>	

# CREATE A NEW CLIENT CHART

If this chart is for the child of a Latinas Patient, scroll down and ensure the appropriate checkbox is checked

**Child of Placed Client**

Initial Primary Worker:  
Click on **“Worker”**

Select the worker who will have primary responsibility for the Client. *This can be altered later if necessary.*


- At Residential this will be the Treatment Coordinator
- At CSS this will be the Counselor
- At FUOP this will be the Clinician

Click on **“Worker Role”**


Select the role of the staff person you entered in the field above

**▲ Initial Primary Worker**

**Worker\***



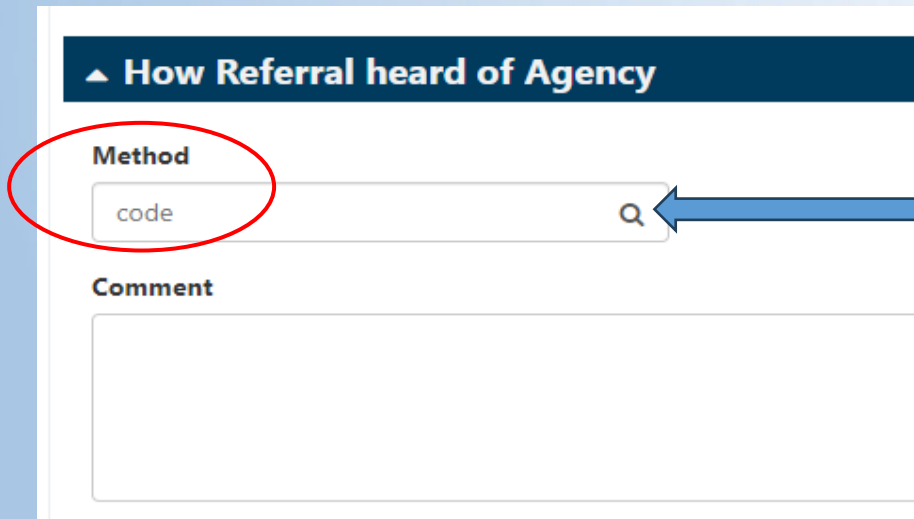
**Worker Role\***



# CREATE A NEW CLIENT CHART

Click “**How Referral heard of Agency**”

- Click the magnifying glass icon “Method” then select the appropriate source. This can be used to track how referral sources hear of the Agency



▲ **How Referral heard of Agency**

**Method**

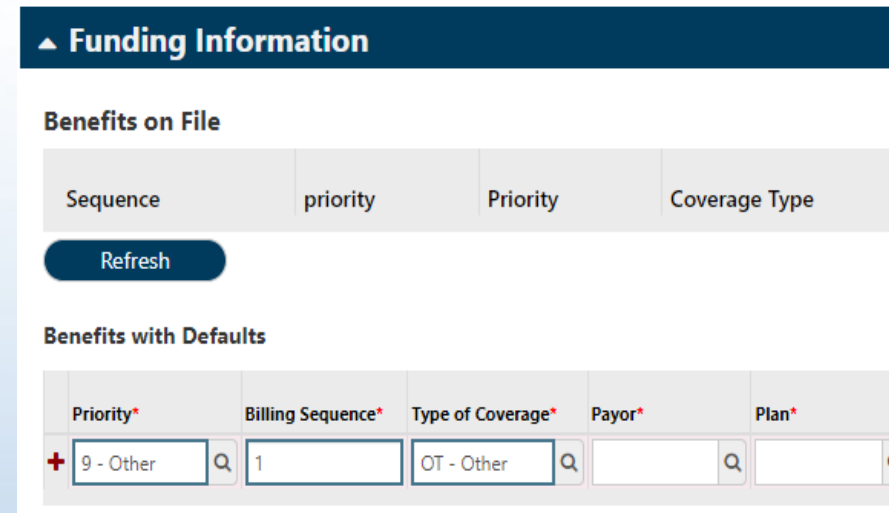
code

**Comment**

Click “**Funding Information**”

- This is where you can enter the benefit assignment at this time

*There will be a separate, more in-depth training about entering benefit assignment at a later date*



▲ **Funding Information**

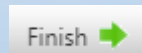
**Benefits on File**

Sequence	priority	Priority	Coverage Type

**Benefits with Defaults**

Priority*	Billing Sequence*	Type of Coverage*	Payor*	Plan*
+ 9 - Other <input type="text"/>	1 <input type="text"/>	OT - Other <input type="text"/>	<input type="text"/>	<input type="text"/>

Once you’ve completed all the needed information Click



# CREATE A NEW CLIENT CHART

Navigate to **Client** ▶ **Client Information** ▶ **Personal Information** ▶ **Demographics** ▶

This shows you the information you previously entered as well as additional fields for addition / editing information

Client ▶ Client Information ▶ Personal Information ▶ Demographics ▶

**TESTING, SMITH** ID# 00005056 DOB 01/06/1988 Intake 02/20/2024 (D) (555) 123-4567 (E) (555) 123-4567 (M) (555) 123-4567 Location BOSTON, MA 02116 [📍](#) Select Client Actions

**36 yrs Female**

**Demographics** Face Sheet Physical Characteristics Healthcare Practitioner Benefit Assignments (Active) Outside Organizations Benefit Assignments Intake Packet and Consents Eligibilities / Classifications Monthly Income Claims on File

Save Cancel Print Send Alert History Refresh Form Info OrderConnect

### Name

<b>Last Name*</b>	<b>First Name*</b>	<b>Middle Name</b>	<b>Name Suffix</b>
<input type="text" value="Testing"/>	<input type="text" value="Smith"/>	<input type="text"/>	<input type="text"/>
<b>Salutation</b>	<b>AKA</b>	<b>Maiden Name</b>	<b>Gender*</b>
<input type="text" value="code"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="F Female"/>
<b>Pronoun Preference</b>	<b>Anonymous</b>		
<input type="text" value="code"/>	<input type="checkbox"/>		

### Address Information

**Personal Address**

Type	Type of Residence	ZIP Code*	Street Address 1	City*	State*	County	Address Date	Mailing Address?	GeoCode	Zipcode Zone	Actions
Homeless	99 - Other	02116		BOSTON	MA - Massachusetts	SUF - Suffolk		<input type="checkbox"/>			<span>Actions</span>
		*****						<input type="checkbox"/>			<span>Actions</span>

# CREATE A NEW CLIENT CHART

## FUOP Adds an Additional Program

If you are a FUOP staff - once the patient is enrolled in your program, you must follow this additional step:

- Going forward all FUOP Patients will be enrolled in the “FUOP” Program **AND** the “Integrated Care Plan” Program
- This will enable staff to create an Integrated Care Plan for the Client

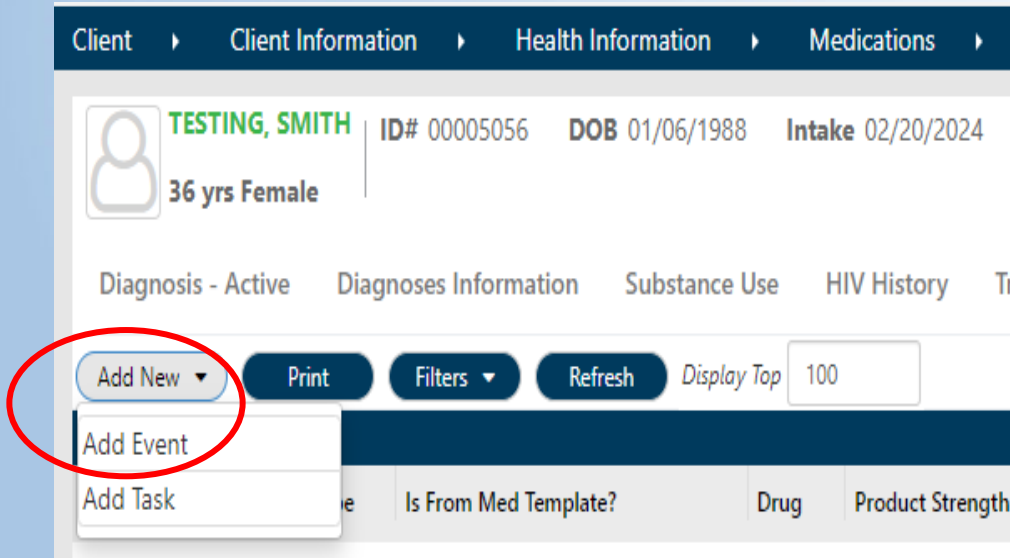
Follow the steps in the section “Create a New Program Enrollment on the Existing Client Chart” of this slide deck to add the enrollment

# CREATE A NEW CLIENT CHART

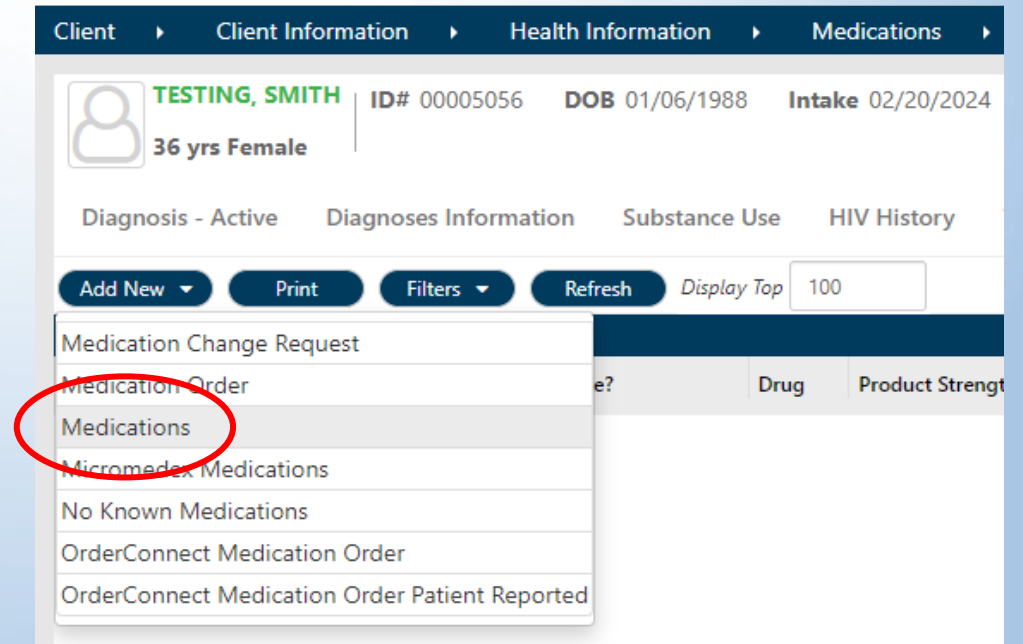
## Adding Medications to a new Client Chart

1. Navigate to: **Client** > **Client Information** > **Health Information** > **Medications**

2. Click on “**Add New / Add Event**” and then select “**Medications**”



3. Click “**Medications**”



# CREATE A NEW CLIENT CHART

The Medications Form will open, and you will enter all relevant details as described on the next slide.

Click the checkbox next to: “Will be used for eMAR” if you are a Residential or CSS Program

- This will cause the “First Administration Date” to be required”
- This will also add the medication to the eMAR function of Evolv

The screenshot shows the 'MEDICATION COMPLETE FORM' for a client named Testing, Smith. The form is divided into two main sections: 'General' and 'Medication Details'. In the 'General' section, there are several input fields and checkboxes. A red box highlights the checkbox labeled 'Will be used for eMAR', with a red arrow pointing to it from above. Other checkboxes include 'Will be used for Medication Packaging', 'Imported From Another System?', and 'Is From Med Template?'. The 'Medication Details' section contains fields for Drug, Product Strength, Start Date, End Date, Date Discontinued, Reason Discontinued, First Administration Date, Use Free Text for Take/sig?, Delivery, Dose, Form, Frequency, Take/sig, Times of the Day for Dispensing Set, Quantity, and Quantity Remaining. The form also includes a sidebar with navigation options like 'Medication Details', 'Data Source', 'Prescription Information', etc.

# CREATE A NEW CLIENT CHART

➤ Complete the following fields:

<b>Drug</b>	Type the name of the medication into “Drug Name” and click “Search”. Select the appropriate medication
<b>Product Strength</b>	Enter the number of milligrams stated on the bottle
<b>Start Date</b>	The date this bottle was prescribed
<b>Delivery</b>	Enter the way this client takes this medication. Example: Oral, Submucosal, etc.
<b>Dose</b>	Enter the number of tablets/capsules/milliliters should be taken each time the client takes this medication, as stated on the bottle
<b>Form</b>	Enter the whether the medication is a pill, tablet, capsule, syrup, etc.
<b>Frequency</b>	Enter how often the medication is taken. Example: Twice Daily, or Every 4 Hours
<b>Time of Day</b>	Select the Time of day the medication should be taken. You can add multiple times if necessary
<b>Quantity</b>	Enter the number of pills staff actually counted as being in the bottle
<b>Refills Remaining</b>	Enter the number or refills remaining as indicated on the pill bottle

# CREATE A NEW CLIENT CHART

As you scroll you will see Tabs to be completed as follows:

➤ **Prescription Information:**

ONLY complete if prescribed by a CASA PROVIDER

➤ **Prescribed by Other Provider Information:**

Complete when prescribed by a provider OUTSIDE CASA

➤ **Diagnosis and Problems Treating:**

If the prescription is treating a diagnosis that is in the Client's chart, that Diagnosis can be selected here

Scroll back to the top of the screen and click "Save"

The screenshot displays a web form with three main sections:

- Prescription Information:** A dark blue header with a white triangle icon. Below it, a subtitle reads "Complete this area if the person prescribing the medication is a staff person". The form contains four rows of input fields: "Staff Prescribed By" (with a dropdown arrow), "Lot Number", "RX#" (with a calendar icon), "Ordered Date" (with a calendar icon), "Pharmacy", "Pharmacy Address", "Pharmacy Phone", and "Pharmacy Fax".
- Prescribed by Other Provider Information:** A dark blue header with a white triangle icon. Below it, a subtitle reads "Complete this section if a non-staff person prescribed the medication". The form contains four rows of input fields: "Prescribed by", "Organization", "Address", "Phone", and "Fax".
- Diagnosis and Problems Treating:** A dark blue header with a white triangle icon. Below it, a subtitle reads "Must be on file for the selected client". The form contains a "Diagnosis" section with a search bar labeled "Diagnosis Treating\*" and an "Actions" button with a dropdown arrow.

# CREATE A NEW CLIENT CHART

Once a client's medications are saved to the chart, they will appear as a list.

Navigate to: **Client** ▶ **Client Information** ▶ **Health Information** ▶ **Medications** ▶

Client ▶ Client Information ▶ Health Information ▶ Medications ▶

**TESTING, SMITH** ID# 00005056 DOB 01/06/1988 Intake 02/20/2024 (D) (555) 123-4567 (E) (555) 123-4567 (M) (555) 123-4567 Location BOSTON, MA 02116 [📍](#) Select Client Actions ▼

36 yrs Female

Diagnosis - Active Diagnoses Information Substance Use HIV History Treatment History Medication Administration Immunizations - Public Health Immunization Registry Batch Immunization Query Medical Documents (Scanned) Allergies ▼

Add New ▼ Print Filters ▼ Refresh Display Top  Layout  Horizontal  Vertical View  Completed Events  Scheduled Tasks

**Completed Events** View Columns ▼

Entered With	Type	Is From Med Template?	Drug	Product Strength	Start Date	Date Discontinued	Staff Prescribed By	RX#	Pharmacy	Pharmacy Address	Pharmacy Phone	Pharmacy Fax	Organization	Status	Actions
Medications - 01/30/2024 12:00am	Medications	no	Tylenol - 500 mg	500 mg	01/30/2024									Modifiable	<span>Actions ▼</span>

- Staff may view more information or edit information by
- Clicking the “Action” button and “Open Form”

ble Actions ▼

- Open Form
- Delete Record

# CREATE A NEW CLIENT CHART

## Review:

1. Client Charts are created in different ways, depending on the situation
  - a) If a person has an existing Client Chart
    - i. Add a program enrollment for your Program to their existing chart
  - b) If a person already has a Referral Chart
    - i. Create a New Client Chart from Accepted Referral Chart
  - c) If a person has NO Referral Chart and NO Client Chart
    - i. Create a NEW Client Chart



**Thank you!**  
**Questions?**