

# e-VA Bulk Actions Enhancements

Updated: March 27, 2024

We are excited to share some recent enhancements to e-VA's Bulk Actions. Though these changes are minor we wanted to make sure our users were aware so they can take advantage of the improved functionality.

## Bulk Actions Enhancements

### 1. Search box moved and 'Special' filter renamed to 'Attributes'

Filters now appear across the top row of the Bulk Actions table and the Search Function will appear on the second row.

The "Special" filter (Not Accepted e-VA yet, Idle Client, etc.), has now been renamed "Attributes" and will appear before any agency-specific filters.

The screenshot displays the 'Bulk Actions' interface. At the top, it shows 'Client data is updated hourly. Last Update: 6:20 PM EDT'. Below this, there are filter controls for 'Show: Clients' (set to 'Mine'), 'Track' (set to 'All Active Tracks'), 'Association' (set to 'All'), and 'Attributes' (set to 'No Filter'). A callout box points to the 'Attributes' filter, stating '"Special" Filter renamed to "Attributes"'. Another callout box points to the 'DOT' filter, stating 'Now includes DOT filter'. A search box is located on the second row, with a callout box stating 'Search Function moved to separate line'. A dropdown menu is open for the 'Attributes' filter, showing options: 'No Filter' (checked), 'Not Accepted e-VA yet', 'Idle Client', 'No/Bad Email', 'No SMS', and 'Opted out of e-VA'. The table below shows two rows of client data with columns for 'Track' and 'Track Date'.

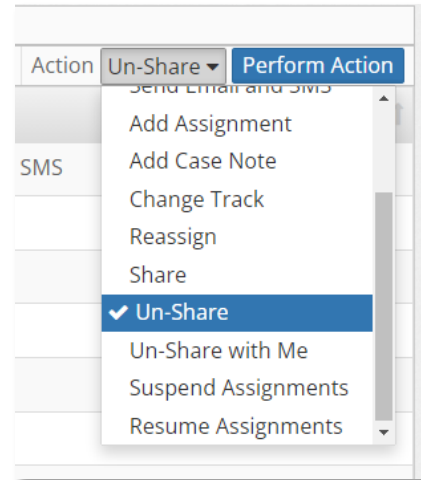
Track	Track Date
Job Ready Services - CH 18	03/29/2024
Rehab to Employment - CH 31	03/26/2024



## 2. Bulk Un-Share option added to Bulk Actions

We have added a bulk **[Un-Share]** option for users to remove they previously shared multiple cases with (Example: You your caseload with Jane, and now Jane has moved to a different office and no longer needs access to your cases).

Previously, users only had the option to share clients with staff (via the **[Share]** action button) or to remove clients that staff have shared *with them* (via the **[Un-Share with Me]** button). Now they will be able to also un-share their clients others.

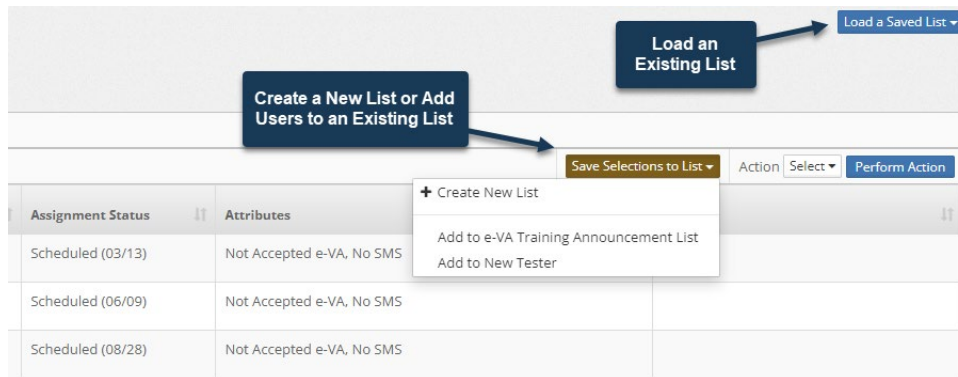


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## Enhancements to Saved Lists

### 3. Saved Lists are now fully editable

Saved Lists are now fully editable. Users can add and remove clients from Saved Lists individually and in bulk.



## i. Adding Clients to a Saved List in Bulk:

1. From the Bulk Actions activity, select all the clients you'd like to add to a List.
2. Click the **[Save Selections to List]** button. In the dropdown, you'll have the option to add the selected client(s) to a new list or to an existing Saved List that will appear in the dropdown.
3. A pop-up will appear, providing you the option to stay on the Bulk Actions screen or load the Saved List for further editing.

The screenshot shows the 'Bulk Actions' interface. At the top, there's a 'Global Client Search' bar and a 'Load a Saved List -' button. Below that, it says 'Select Clients on which to perform bulk action' and 'Showing: Clients: Mine; Track: All Active Tracks; Association: All;'. It also indicates 'Clients: 7 total; 7 visible; 3 selected;'. There are filter options for 'Show: Clients', 'Track', 'All Active Tracks', 'Association', 'Attributes', and 'Caseload'. A search bar is labeled '1'. A table lists clients with columns for Client Name, Track, Track Date, Assigned To, and Attributes. Three clients are selected: Charming, Prince W; DeBose, Asha; and Shrute, Dwight. A 'Save Selections to List -' button is highlighted with a '2' and a dropdown menu is open, showing options: '+ Create New List', 'Add to All', and 'Add to Region 25 List'. At the bottom, it says 'Display 250 records per page'.

## ii) Adding Clients to a Saved List Individually:

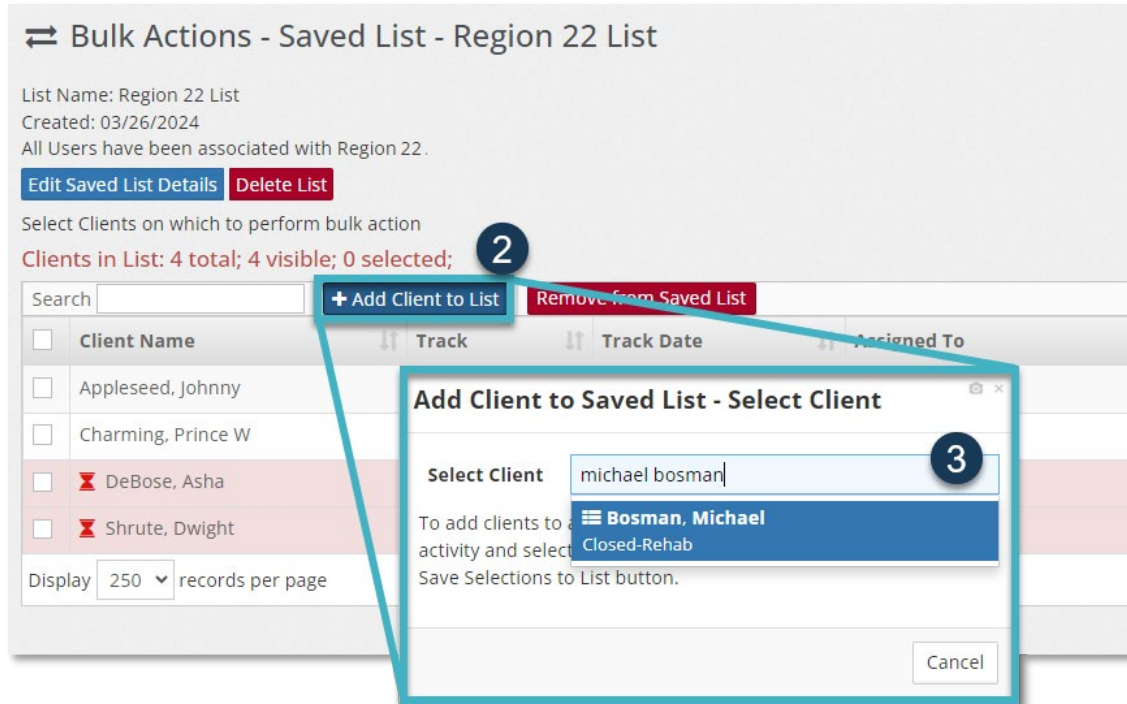
Users can also add individual clients by following the steps above or through the Saved List view, as shown below.

1. From the Bulk Actions activity, click **[Load a Saved List]** and select the list you'd like to edit.

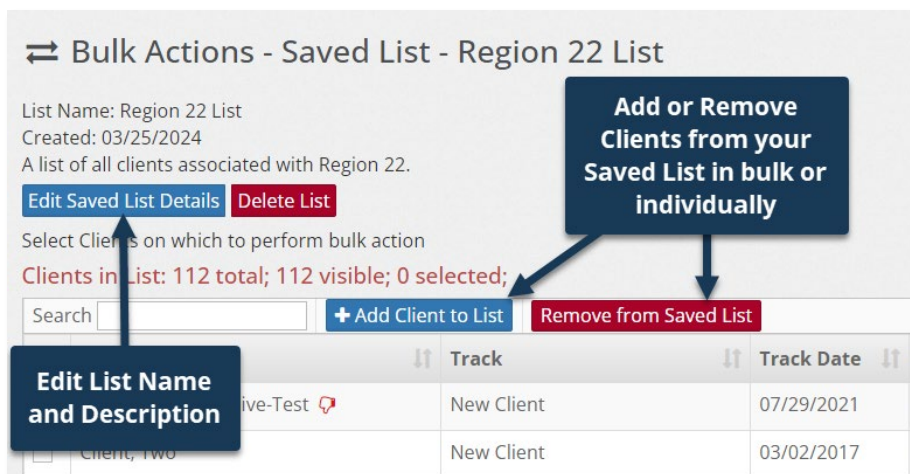
The screenshot shows the 'Bulk Actions' interface with the 'Load a Saved List -' button highlighted with a '1'. A dropdown menu is open, showing options: 'All' and 'Region 22 List'. Below the dropdown, there are buttons for 'Save Selections to List -', 'Action', 'Select', and 'Perform Action'. The table below shows columns for 'atus' and 'Attributes'.



2. You will be taken to your Saved List view. Click **[+Add Client to List]** to load the **Add Client to Saved List** search feature.
3. Begin typing your client's name and select their name when visible.
4. The client will be added to your Saved List.



From the Saved List view, a User can also remove client(s) using the **[Remove from Saved List]** button or edit the name and description of a Saved List by selecting the **[Edit Saved List Details]**.



As always, if you have any questions pertaining to these features, we encourage you to reach out to our Support Team by clicking the **[Contact Tech Support]** button in the bottom right corner of your screen.

