NAVIGATION: Provider Instructions

Mass MyConnectSV Requests

MyConnectSV requests or messages to multiple clients at one time are managed through the **Mass Sending** functionality, which is accessed through the **navigation pad**.

After clicking **Mass Sending**, choose either Message or the type of mass request you'd like to send (Document, Assessment, Location, or Electronic ROI). Details on specific types of requests are included in the next section (Feature Review).



MASS REQUES	TS				
Message	Document	Assessment	Location	Electronic ROI	

Use the dropdowns under the request information section to find a list of clients with MyConnectSV Portal accounts who currently have an **Active** program enrollment (not exited) or **Inactive** program enrollment (previously were enrolled but exited) in the **selected program(s)** within your agency.

 	Active	~	Community Shelter Prog	gram 🗸	SEARCH	
Unique Identifie	er	Program		Start Da	te End Date	Status
8F425AD2A	Daniel Johnson	Commu	nity Shelter Program	01/24/	2022 (not set)	Active

Click SEARCH to get a list of clients with MyConnectSV accounts who are currently active in the Community Shelter Program.

Alternatively, to find clients who are *not* currently or previously enrolled in programs in your agency select **None** and **Without any enrollment**:

None	✓ Without any enrollment (… ✓ SEARCH

Click SEARCH to get a list of clients with MyConnectSV accounts who have never been enrolled in programs in your agency.

SEARCH Jones All All selected You can also use the text box to search for a specific client by Unique Identifie Program Start Date End Date Status name: 28E0D834C Julian Jones (not set) (not set) (not set) None

Click the top toggle button to add all clients in the current list to the **Selected clients list** in the right pane, or add and remove individual clients by clicking the toggle next to their name:

Unique Identifier		Program	Start Date	End Date	Status
6A10F37E7	Sandy Baker	Community Prevention Program	01/11/2022	(not set)	Active
63D31212D	Tish Roberts	Community Prevention Program	02/18/2022	03/06/2022	Inactive

Click **Preview Mass Request** in the right pane to review and send your message or request.

Selected clients list				
PREVIEW MASS REQUEST				
6A10F37E7	Sandy Baker			
63D31212D	Tish Roberts			