



GVT System Update
Quarter One
April 2022

Dear Client,

Global Vision Technologies (GVT) will be conducting an update to Visions Server - the platform behind the FAMCare and/or ClinicalPURSUIT systems on April 19th 2022 between the hours of 6pm and 3am EDT.

The update will be performed regionally and will include local U.S. and International Clients - (West Coast facilities upgrade after 10pm EDT).

March's Visions Server Update - Introduces new features to the FAMCare system along with several updates and fixes. **A full list of changes related to this upgrade can be found [here](#).**

We expect downtime for the server to be less than one hour during this update. Please contact our Client Services Support Team with any questions or concerns about this update. This team can be reached through the support button within your software system or by sending an email to our [client services department here](#).

Regards,

Global Vision Technologies, Inc.

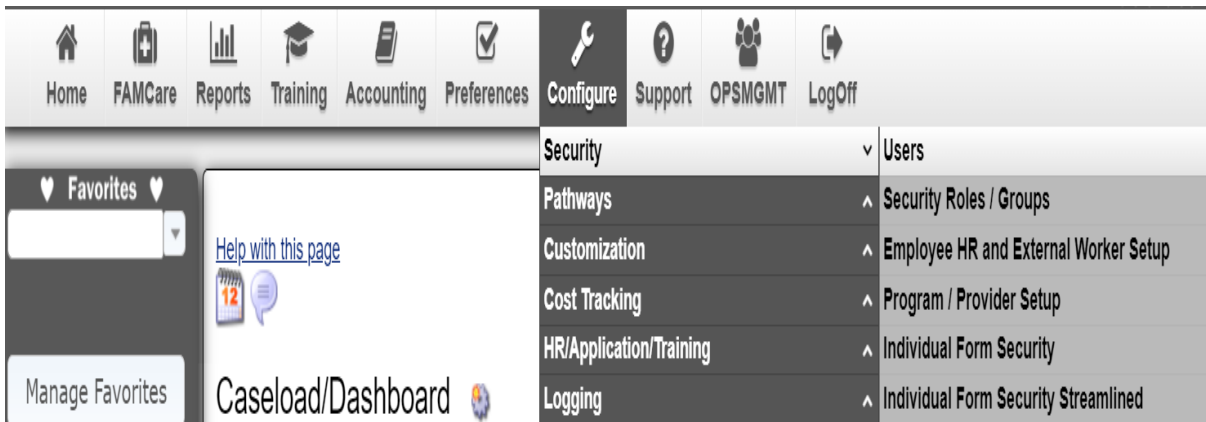
Introduction

This document describes the forms included in GVT's April Update. A brief description of each update is included, and a screenshot where applicable.

PLEASE NOTE that all updates and modifications mentioned below apply only to the standard version of each form. If your agency has had a customized form created (e.g. Custom Treatment Plan), then any modifications listed below will not apply to your form, this applies even if it has the same name. "Where To Find This Form" is based on default system configuration, your system may have a custom menu name and form location names may be reflected.

Visions Server Platform Update

- The terminology of "Handicapped" has been updated to "Disabled" on all Forms within the system.
- Calendar Enhancements have been added to ensure that Customers have the most up to date features.
 - These enhancements include: The OutOfOffice will now allow Users to specify their "out of office range" and the system will reflect this as a blackout date for that User. Subject to any calendar configurations, this feature will prevent appointments from being scheduled if an attendee is out of the office.
- DOE School Data has been updated to ensure that the school's listed are up to date according to the Department of Education record.
- Individual Form Security is now set by searching the specific form rather than navigating through multiple forms to locate what is needed.
- Form Security will now save upon Users navigating to other pages.
- Caseload Dashboard Changes Include the following updates:
 - New Session Variable was added "CASELOADCALENDARLABEL" that will default to Calendar Appointments/Tasks/Sticky Notes.
 - Ajax Search was added as well as Security settings updated to the Client Select Clause to include a Provider Hierarchy Check to ensure proper User access.
- Group Note is now linked to CONFIGURE MASTERSERVICE instead of CONFIGURE MEDICALDENTALBILLINGCODES.



➤ Users now have the ability to apply Group Security to several Users at once by utilizing the User ID screen, selecting the desired clients, and then selecting the appropriate Security Group.

- This feature allows the User to Add the Selected Group to the Selected User, Remove the Selected Group from the Selected Users, or Set Security exactly to the Group(s) selected for selected Users.

Userid

Userid

Firstname

Lastname

Email Address

Provider

Status

Last Login Search (Number of days since last login)

Member of Security Group

Show ALL data on one page

Remove GVT Users from the search

- ClientPortal
- CLINICAL
- DirectorPortal
- EHR Configuration
- Emergency Access
- Foster and Adoption
- Foster Parents
- GVT
- HRADMIN
- INTAKE
- Lockdown Security Group
- Program Director
- Program Manager
- Reports Group
- Residential Direct Care - Supervisor
- Residential Direct Care Staff
- System Administrator
- TASKMANAGER
- Therapists or Clinicians
- Volunteers

Status Legend (click to expand)

Refresh Add
 Licensed Users Allowed: 0
 Licensed Users Used: Error with LOADFIELDS
 Life Users Allowed: 0
 Life Users Used:

Records found: 12. Displaying records 1-12.

Select	Action	Userid	Firstname	Lastname	Email Address	Last Login	Provider/Title	Supervisor	Status
<input checked="" type="checkbox"/>	View/Edit Delete Reset Password Clear Password History Mirror Reset Caseload Columns Setup User Favorites Copy this user to create another user	Caseworker-Supervisor	Caseworker	Supervisor	cs@GVT.me	6/4/2020 1:48:57 PM	Substance Abuse Department Job Title :	John-Caseworker	Unlimited Active
Edit Security Group(s): CALENDAR ADMIN, CASE WORKER OR SOCIAL WORKER SUPERVISION, CASE WORKERS									


- Implementation of the new Password Reset Functionality that allows Users to reset their passwords when locked out of the system by utilizing an MFA code sent to their mobile device via text messaging or sent to their email. To reset your password, just click the [forgot password link](#).



Username

Password [Forgot Password?](#) 

[Need login help?](#)
[GVT Help Desk Support](#)



- Your administrator has the ability to select the verification method for you by navigating to the User ID Screen and selecting the desired verification method under the MFA section of the form.

Home Phone Number :

Cell Phone Number :

MFA Type :

Office Phone Number :

Language :

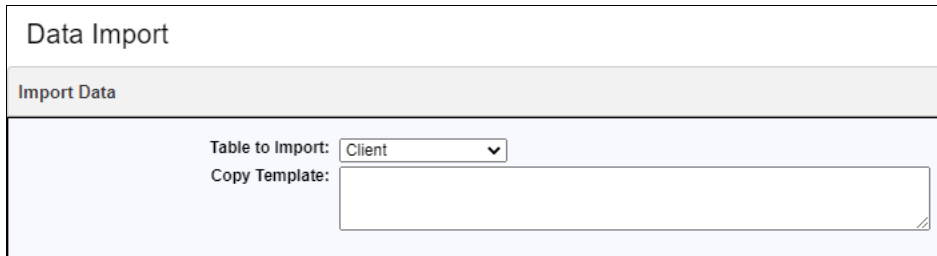
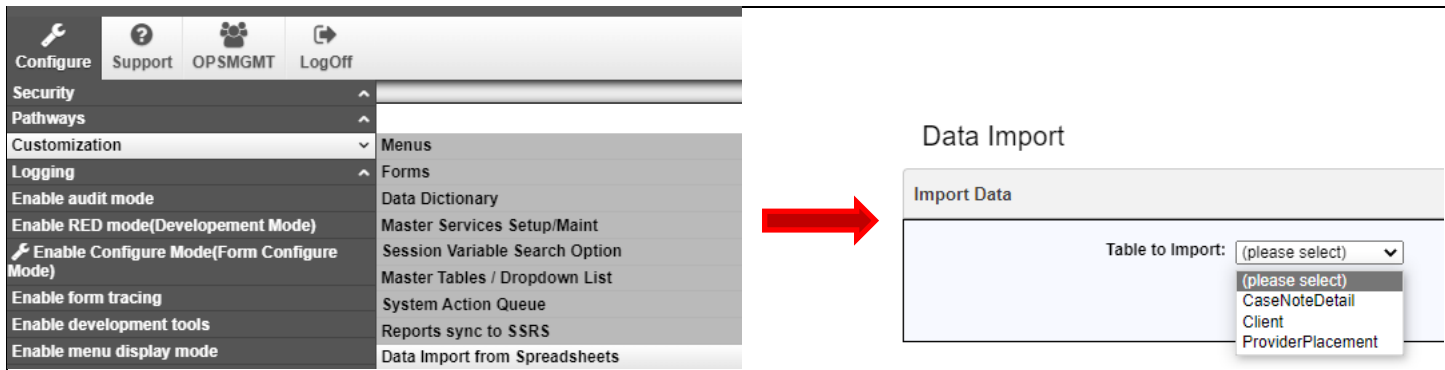
Security Question :

Sec. Quest. Ans. :

New Features

Data Import Tool

- This is a billable feature that allows Users to facilitate their own Data Import.
 - Users simply navigate to the Data Import from Spreadsheets form, select the type of table in which they are importing, & then copy and paste the information from the Master Data Transport Template provided into the textbox.



- 5,000 records can be added per sheet and can be conducted multiple times if needed.
- Only the data points included within the provided spreadsheet can be utilized with this tool.
- The Legacy ID will be utilized to match up clients and will serve to ensure duplicates are avoided. Please ensure that these are entered accurately to ensure a successful import.

External Referral Functionality

- This is a billable feature that allows customers to utilize an external link that external stakeholders can utilize to be navigated to their internal referral form.
- Users have the ability to configure fields within the referral to reflect specific agency requirements.

The image shows a screenshot of the 'Referral Form : New Client'. The form is divided into several sections: 'Person completing this form' (with fields for Referral Date, Person completing this form, and Contact Information), 'Parent/Guardian Information' (with fields for Name of Parent or Guardian, Relationship to child/individual, Telephone, Cell Phone, Email, Best time to reach parent/guardian, and Preferred Method of Contact), and 'Demographic Information' (with fields for Child's/Individual's Last Name and Child's/Individual's First Name).

- The User can scroll down to the Initial Review section of the Referral Form and **select** the “Accepted for Screening, Admission” radio button.

Initial Review

Type of Contact : Telephone Fax In-person Email Website Self Referral

Need for Service :

Type of Inquiry : (Please select)

Pre-admit Decision : Accepted for screening, admission Not accepted

Triage Referral Status Level :

- The User will then **click** the “Save As Client” icon and this will prompt the system to create a client record along with saving the referral history.
- If a referral is denied, the User will **click** the “Save As Referral” icon and a client record is NOT created but the referral record will remain in the system for reference if needed.
- GVT Provides the Direct Link to the Customer to be Utilized or Shared Externally which will direct the User to the agency's referral form.
- The referral can be located within the system by utilizing the Client Search Screen and accessed by **clicking** on the corresponding hyperlink displaying the demographic information.

Search Parameters

Client Referral Recruitment

Last Name : Default search includes *

First Name : Default search includes *

Birth Date : (Searches exact month and date, +/- 5 years)

Referral Date : To

Records found: 5. Displaying records 1-5.

Name (click to select)	Referral Type	Birth Date	Race	Gender	Last Contact	Ref Date
Test, A					9/22/2021	9/22/2021
test, dave	Waiting List	12/7/2004	Asian	Male	11/13/2020	4/23/2019