Spring Cleaning

VSys One Technical Webinar – Spring 2023

No matter how careful you try to be, if there is more than one person in your office, there's a pretty good chance that there are a few oddball things in your data. These are some common things we see in support that sometimes throw off reporting.

People:

No hours but active

Report: People with no recent hours (built-in)

Default: is in the last 120 days, but with the qualifier that there were hours in the last year before that.

> **Completed assignments/hours records**
> Count none; Start date between 120 days prior to today (01/11/2023) and today (05/11/2023)

> **Hours volunteered**
> Sum between 1 and 999999; Start date between 485 days prior to today (01/11/2022) and 121 days prior to today (01/10/2023)

Finding them via Advanced criteria (work with them from there)

<u>Inactive status, but active associations /Inactive status, but active assignments</u>
Many times when the number of people in a job doesn't match the expected count, it's because someone has been inactivated, but their job association or their job assignment has not been closed.
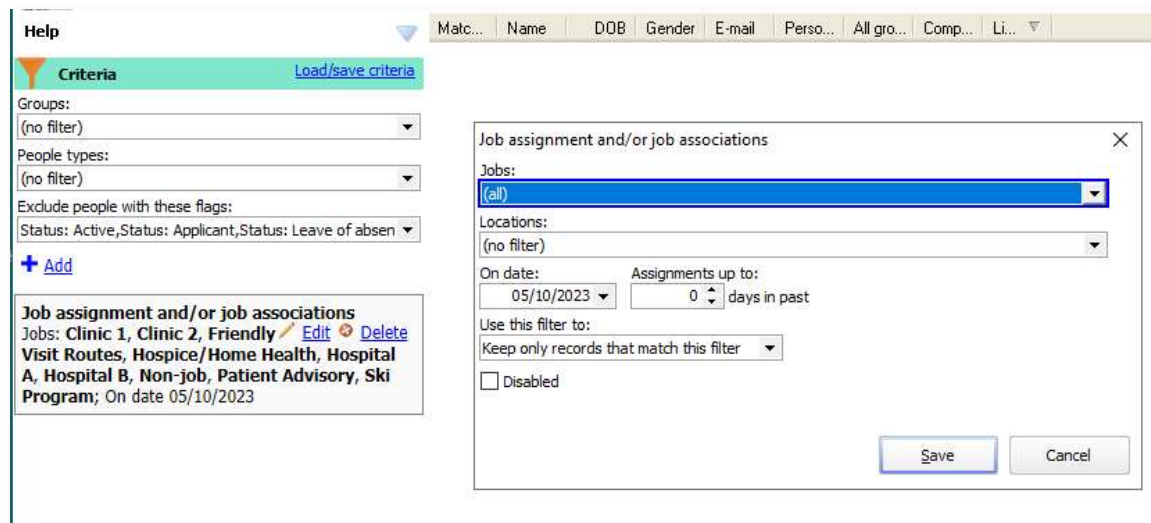
Security:

Starting from the **Security Manager**. There are two things that control administrative access – the person must be **Active** and their security account must be **Enabled**.
Both can be accessed from the right-click menu.
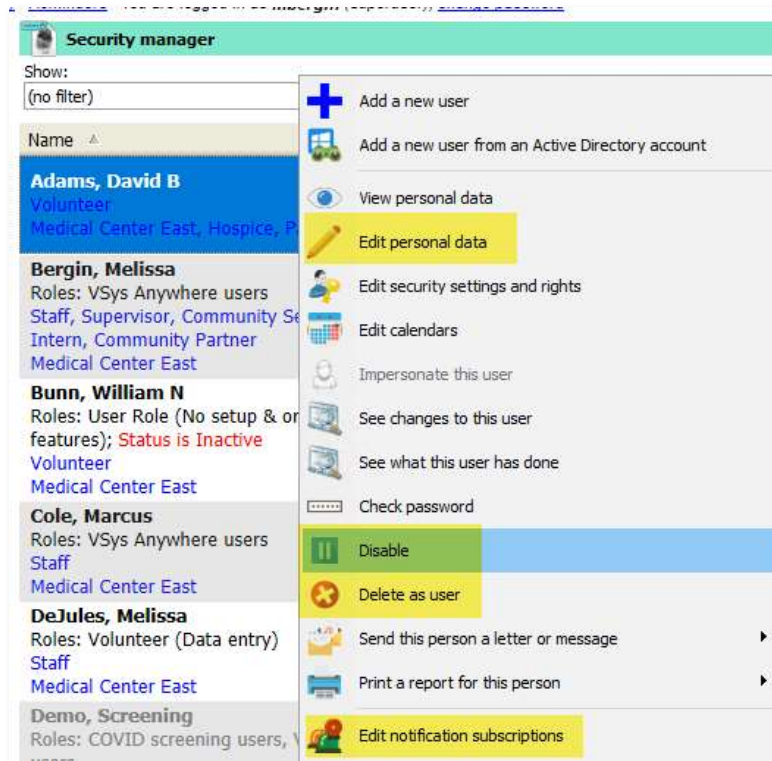
Notifications:

If you are cleaning people from security – do you need to change their notifications too?
From **Notification Subscriptions**:
Right-click options:
> **Make disabled**
> **Change subscriber**

Jobs: (do people first if you're cleaning up Job Associations or Job Assignments)

Report: Jobs with volunteer hours since a certain date (in zip file)

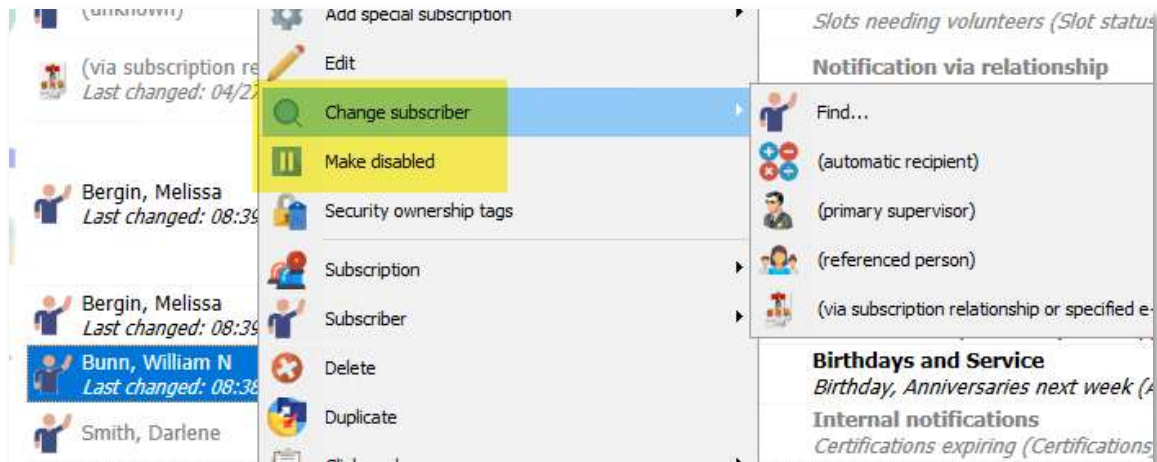|	A	B	C	D	E	F
1	**Hours since 2020**					
2	Fiscal year:	FY2020	FY2021	FY2022	FY2023	total
3	Job group, job	Count	Count	Count	Count	Count
4	Clinic 1, Curious KIDS Project	1	6		1	8
5	Clinic 1, Facilities/Grounds Keeping	1		3		4
6	Clinic 1, Garden Crew			1	1	2
7	Clinic 1, Gift shop		19			19
8	Clinic 1, Shuttle Driver	1	2	13		16
9	Clinic 2, KIDS Read			4	2	6
10	Clinic 2, Office support	1		18	1	20
11	Friendly Visit Routes, Central Region Visits (Route	1	4		1	6
12	Friendly Visit Routes, North Region Visits (Route #1)			1		1
13	Friendly Visit Routes, South Region Visits (Route #	2	1			3
14	Friendly Visits to Seniors :) (Friendly Visit Routes, Central Region Visits (R			16		16
15	Gift Shop Cashier (Clinic 1, Gift shop)			3		3
16	Hospice/Home Health, Hospice/Care visit	1		5	1	7

Inactivate – Not using them? Click them open, click the Inactive check box
Merge – On the **right-click menu, Merge** this with another job.

Tip: Yes, there are ways to use Bulk Value Updater if you are inactivating an entire department.

Certifications:

Inactivate what you aren't using
Steps: **Click open** the certifications
Option 1: **Disable this certification type**
      And hide existing one (this won't show until the first one is checked)
In this case, checking both will make it "disappear" and you <u>can't</u> run reports on it.
Option 2: **Prevent creating this type**
      Choose this if you still want to see it in profiles and potentially report. Existing ones stay, but no new ones can be created.

Report for activity – Certification usage summary (in zip file)

	A	B	C	K	L	M	N	O	P	Q	R	S
1	**Certifications by type**											
2		*Record Year:*	(blank)	2016	2017	2018	2019	2020	2021	2022	2023	total
3	*Description*	*Group: Nar*	Count	Count	Count	Count	Count	Count	Count	Count	Count	Count
4	(blank)	Hospice										
5		Medical Center East										
6		*Subtotal for (blank)*										
7	Automated Background Check Requ	Medical Center East										1
8	Background Fingerprinting	Medical Center East										4
9	Background Reference Check	Medical Center East		4	4		2	3				20
10	Background Results	Hospice										1
11		Medical Center East										5
12		*Subtotal for Background Results*										6
13	Covid Vaccination	Hospice										3
14		Medical Center East			2							1831
15		Patient Family									1	1
16		*Subtotal for Covid Vaccination*			2						1	1835
17	CPR	Medical Center East										1
18	CPR Certification	Hospice							1		3	5
19		Medical Center East							366		1025	1886

Reorganizing

Certification Groups (**Setup-> Certification group**, you won't see this as an option until at least one group is created.)
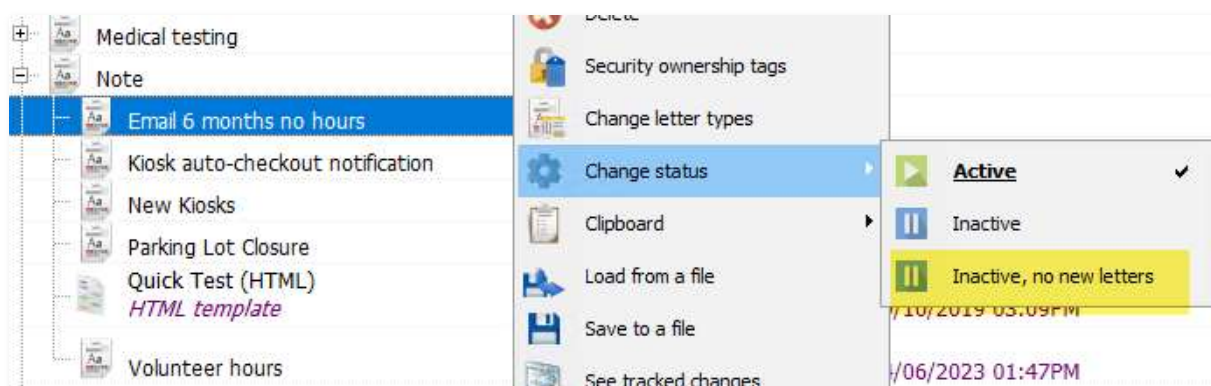
Letters:

Letter Templates
Right-click -> **Inactive, no new letters** for what you aren't using
>   **Inactive** - Not available for merges or filters.
>   **Inactive, no new letters** - Available in filters but not for new letters.

But what if you don't know what you're using?
Report – Letter template usage report (in zip file)

	A	B	C	D	E	F
1	**Letter statuses**					
2		Date:	2021-06	2022-07	2023-05	total
3	Template	Group	Count	Count	Count	Count
4	(blank)	Medical Center East			1	1
5	Handwashing protocols	Hospice	2			2
6		Medical Center East	858			858
7		Subtotal for Handwashing prot	860			860
8	Template html Question	Medical Center East		59		59
9	**Total**		**860**	**59**	**1**	**920**

Tip: If you are using VSys Anywhere and have duplicate, inactivate the RTF version

Reorganize
Letter Types - adds to the existing built-in letter types
From **Letter templates -> Setup letter types** (left navigation bar)

Letter Template Groups – allows you to override the letter types for screen sorting
From **Letter templates -> Setup letter template groups** (left navigation bar)

Reports mentioned in this webinar that are not built in can be downloaded as a zip file and saved to your VSys One system - https://evenfuller.hostedvsys.com/url/hsq3rheiadptduia

For notes on how to load them:
https://www.vsysone.com/docs/VSys/HTMLDocs/4.0/#1857.htm