

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)



Find people using advanced criteria/VSys One (Melissa's test database)

[VSys One](#) > [Find people using advanced criteria](#)

[Bookmarks](#) [\(add bookmark\)](#) [Reminders](#) You are logged in as **mbergin** (superuser); [change password](#)

Help

Criteria [Load/save criteria](#)

Groups:
(no filter)

People types:
(no filter)

Exclude people with these flags:
17 items selected

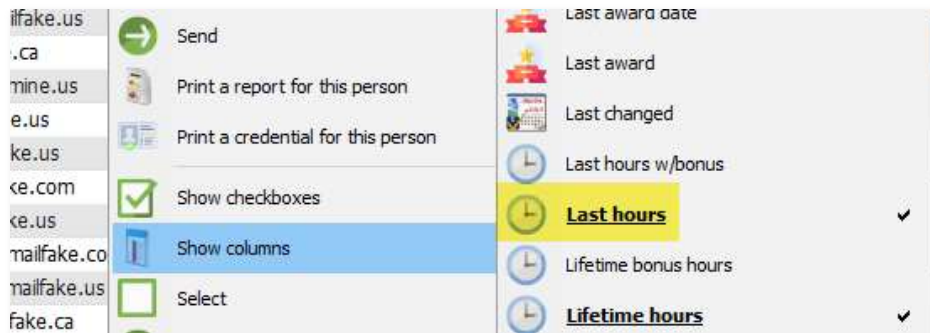
[+ Add](#)

Last volunteer hours [Edit](#) [Delete](#)
Last volunteer hours no later than 01/01/2020; Only for jobs **Clinic 1, Clinic 2, Friendly Visit Routes, Hospice/Home Health, Hospital A, Hospital B, Non-job, Patient Advisory, Ski Program**

Matc...	Name	DOB	Gender	E-ma
0	Land, Kristian K		Female	k.k.l
0	Lakey, Susan J		Female	k.j.l
0	Sandoval, Robert M		Male	r.m.
0	Aden, Agnes F		Female	a.f.a
0	Redfern, Patsy D		Female	p.d.
0	Ethridge, Charles D		Male	c.d.
0	Mueller, Megan J		Female	m.j.
0	Mcmahan, Renee N		Female	r.n.r
0	Hendricks, Ahmad P		Male	a.p.
0	Boyd, Patricia D		Female	p.d.
0	Stump, Hester S		Female	h.s.s
0	Bourg, Benito J		Male	b.j.b
0	Mowrer, Pauline P		Female	p.p.
0	Braithwaite, Eva R		Female	e.r.b
0	Villa, Christopher Y		Male	c.y.v

Tips: Customize your view – add the Last hours

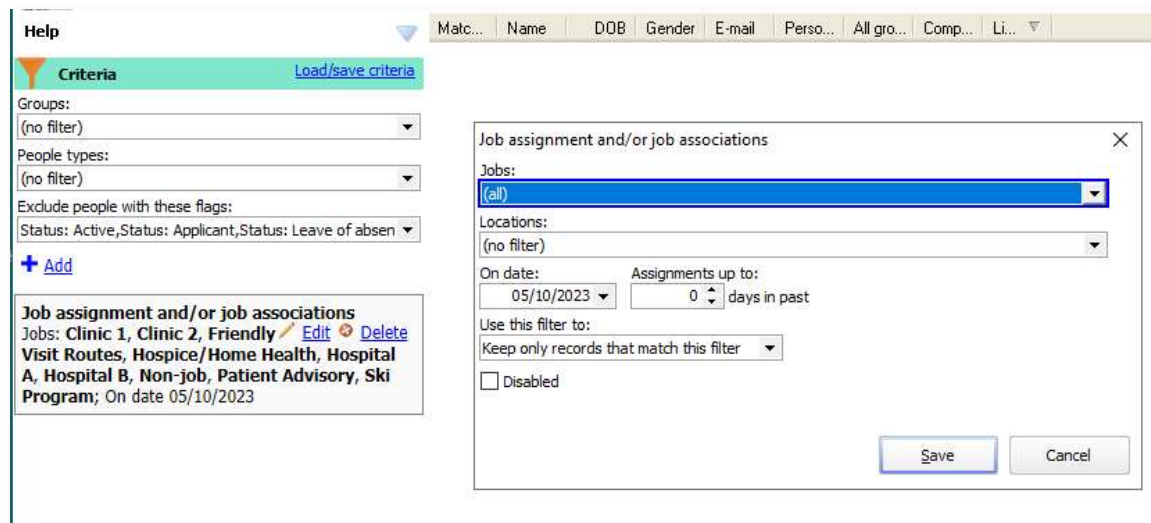
*Right-click in the grid: **Show columns -> Other -> Last Hours***



Tip: Working from a list. Looking for a way to keep track as you go? Select everyone and add them to a list. As you clear them, remove them from the list.

Inactive status, but active associations /Inactive status, but active assignments

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.

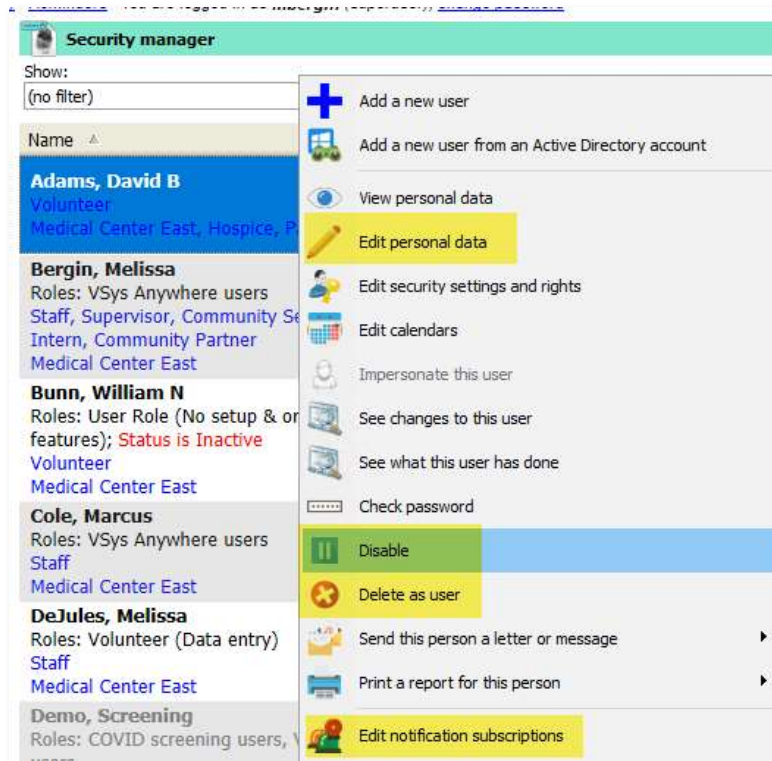


Best practice going forward: When you change someone's status, remember to click the extra checkboxes to cancel them from things.

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:

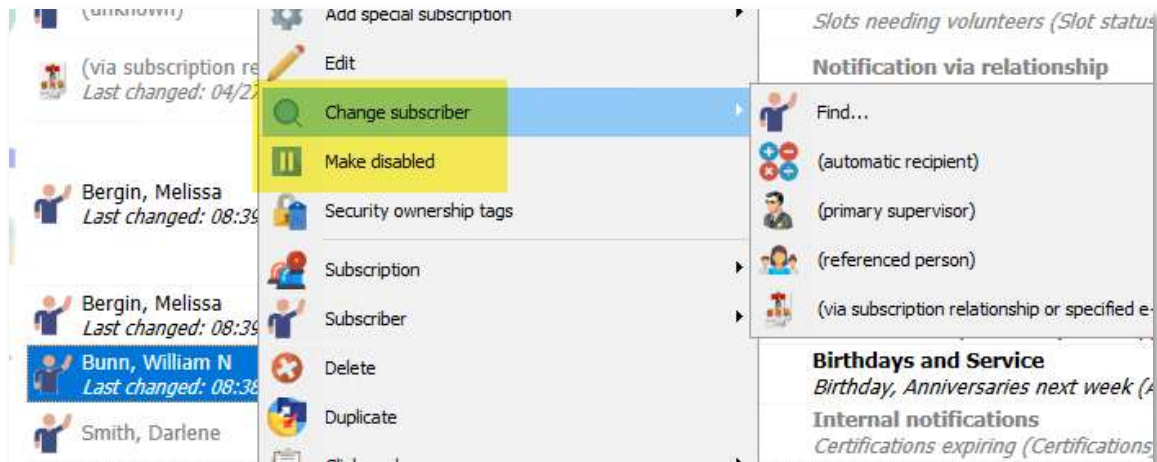
If you are cleaning people from security – do you need to change their notifications too?

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	<i>Fiscal year:</i>	FY2020	FY2021	FY2022	FY2023	total
3	<i>Job group, job</i>	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)	1	4		1	6
12	Friendly Visit Routes, North Region Visits (Route #1)			1		1
13	Friendly Visit Routes, South Region Visits (Route #1)	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 can't 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.

The screenshot shows a configuration form for 'Auto insurance'. It includes a 'Name' field with 'Auto insurance' entered. Below are several checkboxes: 'Disable this certification type' (checked), 'And hide existing ones' (unchecked), 'Automatic layout' (checked), 'A person is only allowed one certification of this type' (checked), 'Prevent creating this type' (unchecked), 'Prevent deletion of certifications of this type once created and saved' (unchecked), 'No automatic effective date' (unchecked), and 'Show on the "Background checks" panel' (unchecked).

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.)

Certifications				
Description	Status	Count	Certification group	Ownership tags
Auto insurance		0		
Automated Background Check Request: IntelliCorp	Disabled	1		
Background Fingerprinting	Disabled	4		
Background Reference Check		20		

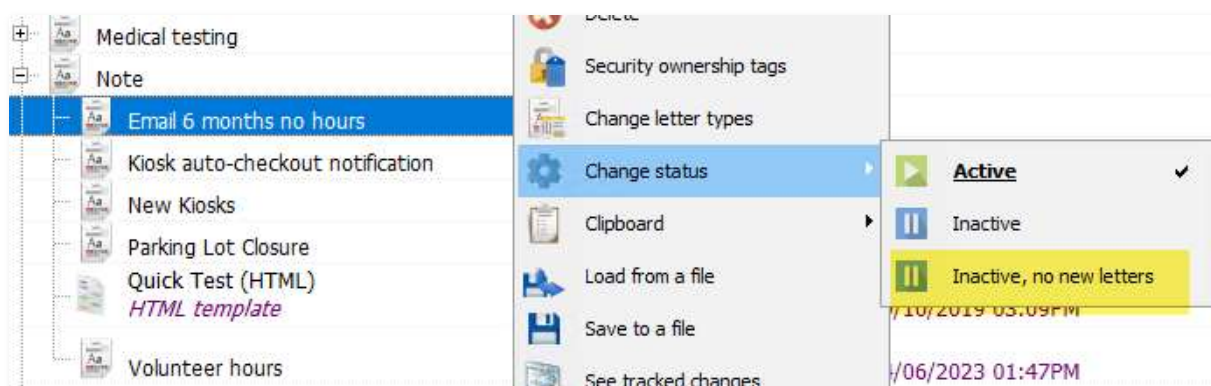
Letters:

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/hsq3rheiadptdua>

For notes on how to load them:

<https://www.vsysone.com/docs/VSys/HTMLDocs/4.0/#1857.htm>