FileVision Health – An introduction

FileVision Health - Web

Desired Benefits

- Resolving different practices and creating uniformity in systems and procedures

- Operational efficiency by measuring practice and performance against agreed standards

- One central information management system connecting all parts of the organisation will create a common and focussed understanding of issues impacting on service delivery or strategic vision

- Less cumbersome, time consuming systems and processes will improve client facing time

- Improved administration and more accurate and secure data entry /compliance

- Technology "agnostic" access and flexible hosting platforms

Client Information Screen

Client's Personal Details

Client's key Contacts

Client Contacts

Client Contact

Kelly Brown - 2 y 3 mths - Late Effects

Activity ▾ Navigation ▾ Documents ▾ Information ▾ Administration [Search] [Name ▾] [Search]

Login | DownloadFile | Search | Client |

Client Information | Contacts | Education | Referral Information

[Add New Contact]

Family Contacts

Key Contacts

Name	Relationship	Preferred Contact	Lives with Client	Connect Group
Brown, Cindy	Mother	021 111 111	No	
Brown, Brad	Father	021 5855555	No	

Client's Professional Contacts

Professional Contacts

Name	Role	Preferred Contact	Email		Organisation
administrator, CCF	Snr Manager	CCF.administrator@fraame.com	CCF.administrator@fraame.com		Auckland DHB

Client's Relationships

Relationships

Name	Relationship	Preferred Contact	Age	Lives with Client	Connect Group
Brown, Marsha		021 444 444		Yes	

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Key Contact Entry Screen

Same look and feel as the Client Information Screen

School History Entry Screen

Education History
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Activity ▾   Navigation ▾   Documents ▾   Information ▾   Administration   [Search]   [Name ▾]   [Search]

Education | Education | Education | Contact |

Client Information   Contacts   Education   Referral Information

Add New School

School Name	Contact	Year Started	Year Finished	Current
Fairleigh Kindergarton		2018		Yes

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All School history

Referral History Entry Screen

Change/Updating Case Details Screen

Update information such as
Status, Area and Staff assign

Case Note Summary
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Activity ▾   Navigation ▾   Documents ▾   Information ▾   Administration   [Search]   [Name ▾]   [Search]

Education | Contact | Contact | Referral Information |

Case Note Filter

☐ Excl Administration Notes   Date of Activity   [dd/mm/yyyy]   To   [dd/mm/yyyy]

☐ Unplanned Visit   Client Support   [Emotional ▾]   CCF Staff   [Staff List ▾]

                                                             [Client Support List ▾]   Search For   [   ]

                                     Contact Type   [Contact Type List ▾]   [Clear All] [Search]

Case Note

[Close] [Print]

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Client Targets Screen

Set Targets for the Client or
Family

Safety Concerns Screen

If you have concerns about the Clients or Family members safety they can be noted here.

Safety Concern

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Activity ▾   Navigation ▾   Documents ▾   Information ▾   Administration   Search   Name ▾   Search

Target | Target | Financial Support | Safety Concern |

Start Date	Status	Staff	Category	Outcome
6/12/2018	Active	CCF Administrator	Risk of Harm to Self	

Add Safety Concern

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Case Notes Entry Screen

This is the main Case Notes entry screen

You select the Activity/Appointment type such as:
•Family Visits
•Hospital Visits
•Telephone calls

You have unlimited free text narration box for your notes, this has spell check.

Individual Case Note

Date of Entry	06/12/2018	Contact Type	▼	Appt Duration ___ Mins
Date of Activity	06/12/2018	Unplanned ☐		Travel Time ___ Mins
Client Present	☑	**CCF Staff Present**		Client Support [Emotional ▼]
Others Present	Client Present List ▾	CCF Administrator ☐		Client Support List ▾
	free text for Others Present			

Situation

Background

Assessment

Recommendation

Review/Outcome

Future Appointments

[Add Safety Concern] [Make Appointment] [Review Case Summary]

[Upload Document] [Mark as Finalised]

You can Enter in the duration of the appointment and Travel time

You can assign the Targets that are pre-set to this note

A note can be saved at any time for review and editing, but once you finalise the Note it can only be read and not changed

Case Notes Summary Screen

All finalised Case Notes and automatically populated notes can be ready here

Automatically Populated Notes include:
- Additions and Changes to Contacts/Relationships/School Information
- Changes to Territory Families Staff for this case
- Telephone calls
- Safety Concerns
- Internal Emails and Acknowledgements

You can filter the notes so you only see the notes you want to see. You can filter on:
- Targets
- Territory Families Staff
- Activity/Appointment Type
- Date ranges

By default only Case notes display, administration notes such as Address changes etc will only display if you un-tick the Exc Admin Notes

Only finalised Note are shown on this screen

Safety Concern | Change Case Details | Change Case Details | Case Note |

Case Note Filter

☐ Excl Administration Notes	Date of Activity	dd/mm/yyyy	To	dd/mm/yyyy
☐ Unplanned Visit	Client Support	Emotional ▼	CCF Staff	Staff List ▾
		Client Support List ▾	Search For	
	Contact Type	Contact Type List ▾		Clear All Search

Case Note

Date	CCF Staff		Contact Type	Client Support
06/12/2018	CCF Administrator		Change Case Details	

Background
Referral Date changed from 15/10/2018 to 15/10/2018

Future Appointment

Date	CCF Staff		Contact Type	Client Support
06/12/2018			Client Target	

Background
New Client Target Added: Beads of Courage

Future Appointment

Close   Print

Client Summary Screen

This screen is an Overview of the Clients Information

Includes any outstanding task regardless of who it is assigned to

Any new documents added within the last 30 days

The staff assigned to this case

Any current safety concerns

Any future appointments

A list of top targets

A list of all Primary Contacts

Internal Emails

Emails can be sent from within FileVision.

Emails sent from FileVision will automatically be added to the Clinical Notes:

You will always get a confirmation message to ensure complete Client privacy.

Documents

Any electronic document can be saved into FileVision.

Once saved you can view, print, email and edit the documents.

Each Client will get a standard Folder Structure the Main folder will be the Diagnosis and Referral Date, followed by the standard folders. If a subsequent referral comes in at a later date the client will get a new folder structure so documents can be easily identified to the appropriate referral

Group Setup

A list of Groups, that can be clicked on to drill down to full information

Created by: CCF Administrator at 6/12/2018 2:41:32 PM
Last Modified by: CCF Administrator at 6/12/2018 2:41:32 PM

Group Name | Parents Group

Parents Group - Weekly - Active ▼ | Active ▼

Group Status | Active ▼

Add New Group

Appointment Time

Start | 12:00

End | 13:00

Duration | 60 Minutes

Staff Involved

Assigned	Start Date	End Date	Inactive
CCF Administrator ▼	6/12/2018		☐
Sally Social ▼	6/12/2018		☐

Close | Enter New Staff | Add Group Attendees | Edit

Recurrence Pattern

☐ Daily | Recur Every | 6 | Week(s) On

☑ Weekly | ☐ Monday | ☑ Tuesday | ☐ Wednesday

☐ Monthly | ☐ Thursday | ☐ Friday | ☐ Saturday

☐ Other | ☐ Sunday

Range of Recurrence

Start | 06/12/2018 | ☑ No end date

Additional information about the Group

☐ End after | | Occurrences

☐ End by | dd/mm/yyyy

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Group Setup

Set up a recurring or single Group

Group Setup

Confirm if they are attending

Search and find the appropriate attendees, send them a invitation.

Group Setup

Once the Group has met, you can create group notes that go to each attendee's client note summary.

Confirm if they attended

Dashboard Items

Similar to instant mini reports. Each item can be drilled down

Possible items can be
- Client Lists
- Task Lists
- Client numbers by Branch
- Client Case load by FSC/by team
- Clients that haven't had any contacts in XX Months
- Appointment Scheduling
- Current Safety Concerns

Schedule Widget

This widget is designed to create and manage Client or Non-Client appointments

Click to view the
client record

Ability to add Notes or
~~~~ ~~~~ the appointment

Schedule of Appointments

	Name	Time	FSC	Type	Considerations	Safety Concerns
☐	Van Tester, Ally	15:30	Administrator, CCF	In Person – Home		Risk of Harm to Self Risk of Har…
☐	Van Tester, Ally	15:30	Lill, Adrianne	In Person – Home		Risk of Harm to Self Risk of Har…

Select All   Print   Show More

Features
- Allows for Direct Client time or indirect Client time i.e. Report writing, follow up, Grants and Financial support.
- Pre define what type of appointment you have assigned i.e. First Meeting, Family Appointment, Individual session.
- Links Client Appointments to the Client Notes
- Allows for staff to move or reassign appointments easily if someone is away.
- Creates an Outlook appointment
- Full reporting on Clinical verse Non Clinical time.

Schedule Widget

Example of the Appointment Screen

Features
• Allows for Direct Client time or indirect Client time or Non Client Appointments.
• Pre define what type of appointment you have assigned i.e. First Meeting, Family Appointment, Individual session.
• Reoccurring Sessions
• Invites to Contacts and other professionals.

Ad-Hoc Reporting

For users with Boolean experience, they can create one–off reports, or save the search criteria and use it regularly

Features
- Create reports.
- Review the data on screen, drill down if necessary.
- Fields can be defined for the results screen and CSV.
- Export to CSV