

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 Information

Kelly Brown - 2 y 3 mths - Late Effects

Activity

Navigation

Documents

Information

Administration

Search

Name

Search

Client's Personal Details

Login

DownloadFile

Search

Client Information

Contacts

Education

Referral Information

Legal Name

Surname

Brown

First Name

Kelly

Middle Name

Title

Miss

Preferred Name

Surname

First Name

Also Known As

Personal Information

Date Of Birth

15/08/2016

Age

2y 3mths

Gender

Female

Ethnicity

New Zealand European

NZ Resident

Yes

No

Shared Custody

☐

Fundraising Ref

Client's key Contacts

| Key Contacts | | | | |
|--------------------|--|-------------------|-------------------|-------------------|
| Name | Relationship | Lives with Client | Preferred Contact | Email |
| Brown, Cindy | Mother | No | 021 111 111 | kellyvw@gmail.com |
| Physical Address | 9 Styx River Place, Brooklands, Christchurch, 8083 | | | |
| Brown, Brad | Father | No | 021 5855555 | |
| Physical Address | 9 Styx River Place, Brooklands, Christchurch, 8083 | | | |
| Regional Movements | | | | |

Client Contacts

Client Contact

Kelly Brown - 2 y 3 mths - Late Effects

Activity ▾ Navigation ▾ Documents ▾ Information ▾ Administration

Name ▾

Login | DownloadFile | Search | Client |

Client Information

Contacts

Education

Referral Information

Key Contacts

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

Professional Contacts

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

Relationships

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

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Family Contacts

Client's Professional
Contacts

Client's Relationships

Key Contact Entry Screen

Same look and feel as the Client Information Screen

 CCF Log out

Key Contacts

Brown,Cindy

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

Created by: CCF Administrator at 15/10/2018 10:39:50 AM
Last Modified by: CCF Administrator at 15/10/2018 10:39:50 AM

Client Information **Contacts** Education Referral Information

Key Contact **Membership**

| Name | Physical Address | Contact |
|---|---|---|
| Surname * <input type="text" value="Brown"/> | Address 1 * <input type="text" value="9 Styx River Place"/> | <input type="checkbox"/> Preferred |
| First Name * <input type="text" value="Cindy"/> | Address 2 <input type="text"/> | Postal <input type="checkbox"/> |
| Middle Name <input type="text"/> | Suburb <input type="text" value="Brooklands"/> | Mobile Phone * <input type="text" value="021 111 111"/> <input checked="" type="checkbox"/> |
| Title <input type="text"/> | Town/City <input type="text" value="Christchurch"/> | Home Phone <input type="text"/> <input type="checkbox"/> |
| | Postcode <input type="text" value="8083"/> | Work Phone <input type="text"/> <input type="checkbox"/> |
| Preferred Name | Postal Address | Email Address <input type="text" value="kellyvw@gmail.com"/> <input type="checkbox"/> |
| Surname <input type="text"/> | Address 1 <input type="text"/> | Do Not Contact <input type="text"/> |
| First Name <input type="text"/> | Address 2 <input type="text"/> | Additional Information |
| Also known as <input type="text"/> | Suburb <input type="text"/> | Contact Status <input type="text" value="Active"/> |
| Personal Information | Town/City <input type="text"/> | Relationship <input type="text" value="Mother"/> |
| Date of Birth <input type="text" value="dd/mm/yyyy"/> | Postcode <input type="text"/> | Living With Client <input type="checkbox"/> |
| Age <input type="text"/> | | Do Not Contact <input type="checkbox"/> |
| Gender <input type="text"/> | | Fundraising Ref <input type="text"/> |

Close Duplicate Edit

School History Entry Screen

Education History

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Activity ▾ Navigation ▾ Documents ▾ Information ▾ Administration

▾

Education | Education | Education | Contact |

Client Information

Contacts

Education

Referral Information

Add New School

| School Name | Contact | Year Started | Year Finished | Current |
|------------------------|---------|--------------|---------------|---------|
| Fairleigh Kindergarten | | 2018 | | Yes |

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All School history

Referral History Entry Screen

Referral Information

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Activity

Navigation

Documents

Information

Administration

Search

Name

Search

Education

Education

Contact

Contact

Client Information

Contacts

Education

Referral Information

| Date of Referral | Diagnosis | Support Status | Medical Status | Date of Discharge |
|------------------|--|----------------|----------------|-------------------|
| 15/10/2018 | III CNS and Miscellaneous Intracranial and Intraspinal Neoplasms | 5 | Late Effects | |

For Clients that may require multiple referral information

Close

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Change/Updating Case Details Screen

Case Note Summary

Kelly Brown - 2 y 3 mths - Late Effects

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

☐Unplanned Visit

Client Support

Emotional

Client Support List

Contact Type

Contact Type List

To

dd/mm/yyyy

CCF Staff

Staff List

Search For

Clear All

Search

Case Note

Close

Print

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Client Targets Screen

Set Targets for the Client or Family

Target

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Activity ▾ Navigation ▾ Documents ▾ Information ▾ Administration

Search

Name ▾

Search

Case Note Summary | Target | Target | Target |

| Target Type | Start Date | Priority | Status |
|------------------|------------|----------|--------|
| Beads of Courage | 6/12/2018 | High | Active |

Enter New Target

Target Setting

Created by: CCF Administrator at 6/12/2018 2:33:34 PM

Last Modified by: CCF Administrator at 6/12/2018 2:33:34 PM

Target Type

Beads of Courage ▾

Start Date

06/12/2018

Priority

☒ High ☐ Medium ☐ Low

Other

Status

Active ▾

Information

Target Here

Close

Review Target Notes

Edit

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Safety Concerns Screen

Safety Concern

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Activity▼

Navigation▼

Documents▼

Information▼

Administration

Search

Name▼

Search

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

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 | <input type="text" value="06/12/2018"/> | Contact Type | <input type="text" value="Unplanned"/> | Appt Duration | <input type="text" value=""/> Mins |
| Date of Activity | <input type="text" value="06/12/2018"/> | Unplanned | <input checked="" type="checkbox"/> | Travel Time | <input type="text" value=""/> Mins |
| Client Present | <input checked="" type="checkbox"/> | CCF Staff Present | <input type="checkbox"/> | Client Support | <input type="text" value="Emotional"/> |
| Others Present | <input type="text" value="Client Present List"/> | CCF Administrator | <input type="checkbox"/> | Client Support List | <input type="text" value=""/> |
| | <input type="text" value="free text for Others Present"/> | | | | |

Situation

Background

Assessment

Recommendation

Review/Outcome

Future Appointments

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

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

Case Note Filter

| | | | | |
|--|------------------|--|--|---|
| <input type="checkbox"/> Excl Administration Notes | Date of Activity | <input type="text" value="dd/mm/yyyy"/> | To | <input type="text" value="dd/mm/yyyy"/> |
| <input type="checkbox"/> Unplanned Visit | Client Support | <input type="text" value="Emotional"/> | CCF Staff | <input type="button" value="Staff List"/> |
| | | <input type="button" value="Client Support List"/> | Search For | <input type="text"/> |
| | Contact Type | <input type="button" value="Contact Type List"/> | <input type="button" value="Clear All"/> | <input type="button" value="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 | | | |

Only finalised Note are shown on this screen

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

Client Summary Screen

This screen is an Overview of the Clients Information

Client Summary

Kelly Brown - 2 y 3 mths - Late Effects

Activity ▾ Navigation ▾ Documents ▾ Information ▾ Administration ▾

Search Name ▾ Search

Considerations

| Consideration | Date |
|---------------------------|------|
| No matching records found | |

Add Consideration

Planned Appointments

| Type | Date | Assigned Roles |
|---------------------------|------|----------------|
| No matching records found | | |

Add Appointment

Tasks

| Type | Date | Assigned To | Status |
|-------|-----------|-------------------|--------|
| Alert | 6/01/2019 | CCF Administrator | Open |

Add Task

Key Contacts

| Name | Relationship | Number |
|--------------|--------------|-------------|
| Brown, Cindy | Mother | 021 111 111 |
| Brown, Brad | Father | 021 5855555 |

Add Key Contact

Assigned Roles

| Name | Role | Date Assigned |
|--------------------|-------------------------------------|---------------|
| Administrator, CCF | Primary Family Support Co-ordinator | 6/12/2018 |

Assign New FSC

Safety Concerns

| Start | Category | FSC |
|-----------|----------------------|-------------------|
| 6/12/2018 | Risk of Harm to Self | CCF Administrator |

Add Safety Concern

Recent Document Activity

| Doc Name | Date | Status | Updated By |
|---------------------------|------|--------|------------|
| No matching records found | | | |

Referral Information

| Referral Date | Diagnosis | Date of Discharge |
|---------------|--|---------------------------|
| 15/10/2018 | III CNS and Miscellaneous Intracranial and Intraspinal Neoplasms | View Form |

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.

The 'Add Email' form is located within the FileVision interface. It features a blue header bar with navigation tabs: 'Activity', 'Documents', 'Information', and 'Administration'. Below the tabs are search fields for 'Search' and 'Name'. The main content area includes a breadcrumb trail: 'Change Case Details | Case Note | Case Note Summary | Client Summary'. The 'Recipients' section has a table with columns 'Name' and 'Address', and buttons for 'Add Manually', 'Add Contact', 'Add Group', and 'Add User'. The 'Subject' field contains the text 'Kelly Brown'. The 'Message' field is a large text area. The 'Attachments' section has a label 'Name (Please tick the document(s) you wish to attach)'. At the bottom right are 'Close' and 'Send' buttons. The footer shows '© 2018 - Child Cancer Foundation'.

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

The confirmation dialog box is titled 'Important message'. It contains the text: 'This message includes sensitive information for Selwyn, Sam.' Below this, the 'Recipients:' section lists two email addresses: 'Kelly.vanwieren@fraame.com' and 'Socialworker@starship.health.org'. The dialog asks, 'Are these email addresses correct and do you want to send the email?' and provides 'Yes' and 'No' buttons. At the bottom, it says 'Linked Cases'.

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

Documents

Any electronic document can be saved into FileVision.

Document Input

Activity ▾ Navigation ▾ Documents ▾ Information ▾ Administration ▾

Search Name ▾ Search

Case Note | Case Note Summary | Client Summary | Create Email |

Department

Type

Folder

Autofiling

Doc Information

Status AC Active ▾

Document Date

Document Saved

Document Name

Choose File No file chosen

Upload Reset Add Document Type

Recent Documents

☒ Current Date ☐ Last 24 Hours

| Document Name | Entered By | Status | Date |
|---------------|------------|--------|------|
|---------------|------------|--------|------|

Email

Close

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

Group Name

Parents Group

Group Status

Active

Appointment Time

Start

12:00

End

13:00

Duration

60 Minutes

Recurrence Pattern

☐ Daily

☒ Weekly

☐ Monthly

☐ Other

Recur Every

6

Week(s) On

☐ Monday

☒ Tuesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

Range of Recurrence

Start

06/12/2018

☒ No end date

☐ End after

Occurrences

☐ End by

dd/mm/yyyy

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

Parents Group - Weekly - Active

Active

Add New Group

Staff Involved

| Assigned | Start Date | End Date | Inactive |
|-------------------|------------|----------|--------------------------|
| CCF Administrator | 6/12/2018 | | <input type="checkbox"/> |
| Sally Social | 6/12/2018 | | <input type="checkbox"/> |

Close

Enter New Staff

Add Group Attendees

Edit

Additional information about the Group

Group Setup

Group Set up

Activity Documents Information Administration

SearchNameSearch

Group Setup | Administration | Group Setup | Group Setup |

Group Name

Group

Active

Group Status

Active

Add New Group

Appointment Time

Start

End

Duration

Staff Involved

| Assigned | Start Date | End Date | Inactive |
|----------|------------|----------|----------|
|----------|------------|----------|----------|

CloseEnter New StaffAdd Group AttendeesSave

Recurrence Pattern

☒ Daily

Recur Every

Day(s)

☐ Weekly

☐ Monthly

☐ Other

Range of Recurrence

Start

06/12/2018

☒ No end date

☐ End after

Occurrences

☐ End by

dd/mm/yyyy

Set up a recurring or single Group

Group Setup

Group Members

| Name | Relationship/Client | Start Date | End Date | Attended | DNA | Attendance Notes |
|------|---------------------|------------|----------|----------|-----|------------------|
|------|---------------------|------------|----------|----------|-----|------------------|

Select All

☐ Show Inactive Clients

Invite List

Group Details

Group Name

Parents Group

Currently Active

0

Manage Group Setup

Frequency

Weekly

Start Time

12:00

Create New Session

Group Status

Active

Duration

60 mins

Staff Involved

Administrator, CCF

Social, Sally

- Add New Group Members

Saved Search

Member Type

Client Diagnosis

Client Dianosis List

Client Sub Dianosis List

Region

CCF Region List

CCF Sub Region List

Date of Birth Range

dd/mm/yyyy

dd/mm/yyyy

Gender

FS Status

Key Contact Status

☐ Include Active Status

New Search

Save Search

Start Search

Close

Upload Document

Print

Save

Add New Member

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.

Group Session

Activity Documents Information Administration

Search

Name

Search

Administration | Ad-Hoc Reporting | Search | Client

Group Details

Christmas Party

06/12/2018

Active

Review Past Notes

Session Notes

Staff Involved

| Staff Involved | At Group | Start Time | End Time | Number Attended | Number DNAs | Session Cancelled |
|------------------|-------------------------------------|-------------|----------|-----------------|-------------|--------------------------|
| McKeever, Teresa | <input checked="" type="checkbox"/> | 16:00 | 22:00 | 0 | 0 | <input type="checkbox"/> |
| Lill, Adrienne | <input checked="" type="checkbox"/> | 360 Minutes | | | | |

Attendance Notes

| Name | Notes |
|-----------------|-------------|
| Acronson, Aaron | May be late |

Group Members

| Name | Start Date | Individual Session Notes | DNA | Reason For DNA |
|----------------------|------------|--------------------------|-----|----------------|
| Hardy, Alexandra | 13/08/2018 | | | |
| Acronson, Aaron | 13/08/2018 | | | |
| Stewart, Deborah | 13/08/2018 | | | |
| Yellow-Smith Rainbow | 14/08/2018 | | | |

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

Referrals in Progress (Not Submitted)

| Client Name | Date of Ref |
|---------------------|-------------|
| Create New Referral | |

Referrals Submitted

| Client Name | Referral Date | Referral Status | FSC |
|-------------------------|---------------|-----------------|-----------------|
| Hardy, Alexandra (Alex) | 30/11/2018 | Outgoing | Delete Referral |
| Forty, Four | 19/11/2018 | Outgoing | Delete Referral |
| Smith, Robert (Bobby) | 12/11/2018 | Outgoing | Delete Referral |
| Brown, Jack (Moo) | 13/09/2018 | Outgoing | Delete Referral |

Show More

My Task List

| | | |
|-----------|--|--------------------|
| | Referral has been accepted | Open |
| | New Membership | Open |
| | New Membership | Open |
| | Isabella Summer Lee Dawson - Non Document Action | Open |
| Follow Up | Sally Ann Wilson | Open |
| Follow Up | Sally Ann Wilson | Open |
| Follow Up | Eve Adams - Orange | 16/11/2018 Overdue |
| Follow Up | Andrea Mayo | 21/11/2018 Overdue |
| Follow Up | Andrea Mayo - Check If hyperlink works | 28/11/2018 Overdue |

Show More New Task

Referrals

| Category | Percentage |
|---------------|------------|
| Declined | 15.2% |
| Accepted | 78.3% |
| Outgoing | |
| Not Processed | |

FSC Team Case Load

| Name | 1 | 2 | 3 | 4 | 5 | Totals |
|-----------|---|---|---|---|---|--------|
| Show More | | | | | | |

Clinical Activities

| Category | Percentage |
|-------------------------|------------|
| Overdue | 38.6% |
| Due in the next 14 days | 14.3% |
| Due 14 days plus | 57.1% |

Recent Referrals and Status Changes

| Name | Date of Referral | FSC | FS or Ref Status |
|----------------------|------------------|-----|------------------|
| | 08/08/2018 | | Outgoing |
| Yellow, Edge | 01/08/2018 | | Outgoing |
| Smith, William | 10/08/2018 | | Outgoing |
| Yellow-Smith, Birdie | 11/08/2018 | | Outgoing |
| Freeman, Daisy | 01/08/2018 | | Outgoing |
| | 12/11/2018 | | Outgoing |

Schedule Widget

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

Click to view the client record

Schedule of Appointments

| | Name | Time | FSC | Type | Considerations | Safety Concerns |
|---|------------------|-------|--------------------|------------------|----------------|-------------------------------------|
| <input type="checkbox"/> | Van Tester, Ally | 15:30 | Administrator, CCF | In Person – Home | | Risk of Harm to Self Risk of Har... |
| <input type="checkbox"/> | Van Tester, Ally | 15:30 | Lill, Adrienne | In Person – Home | | Risk of Harm to Self Risk of Har... |
| <div>Select All</div> <div>PrintShow More</div> | | | | | | |

Click to add Notes or to add appointment

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

Add Appointment

Activity Documents Information Administration

SearchNameSearch

Group Setup | Group Setup | Group Attendee | Client |

Assigned StaffAdministrator, CCF

Type of AppointmentDirect Client Appointment

Select Client NameBrown, Kelly

Select CaseBrown, Kelly (15/10/2018)

Appointment Type

Date Appointment06/12/2018

Start Time

End Time

Duration

Invite Other Attendees

StaffPlease choose invited Staff

Family ContactsPlease choose invited Contact

Create Recurring Appointment

CancelSave

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

Ad-Hoc Reporting

Activity Documents Information Administration

SearchNameSearch

Group Attendee | Client | Appointment | Administration |

FindSelect Output ColumnsResults

Select CriteriaDescriptionDeleteCancelSave

Criteria Details

Look forFieldBracket()OperatorAND OR

FieldComparisonValue

CloseModifyClearFind

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