FAMCare December 2019 Upgrade

Introduction

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

***PLEASE NOTE** 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, 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.*

Visions Server Platform Updates, Version 15.0.1195

- If length of nextvalue for masterkeys overflows, add a digit to accommodate it. Prior to that, the numbers would reset back to 0
- Support to handle multiple parent organizations for providerheirarchy rebuild. Contact your PM if you need this functionality.
- Update to put threadnumber on tempoutpout to fix concurrent view issue, bug fix if multiple people are working in the form editor.
- Fix so blank SV's always return blank. This fixes an issue if an IP address was blacklisted and the SV didn't exist.
- On client security check, wasn't putting in the provider code for the message, minor fix.
- Bug fix, if SSN specified, was bypassing encryption on the CLIENT table
- Bug fix, update for master script load to not error
- Fields lot_no AND ship_add1 to populate from SP OPENPROVIDER when creating on account invoices, this helps with reporting
- Move the printscript.cfg button to within the body tag, helps fix formatting and pdf gen issues.
- Fix generatechoicescripts to not error when genning an empty master table
- Support OPENACCOUNT on the open payment processing. This allows an income account to be specified on an open payment.
- Put in Batch Number for all censusbillingapply records. This help with batch payment tracking and reporting
- Create ORIGINALLOCKDATE in censusexception, populate once, if lower case code do not lock,

make sure cust_id gets on artrans for batches.

- If mirroring a user, do not update the last login date for the mirrored user.
- Adjustments for monthly events, support TRUEMONTH in PATHWAYGENOPTION. This lets the time period align perfectly with month start/end if necessary.
- Support ONACCOUNTINVOICEPREFIX + optionally masterkeys ONACCOUNTINV_NUM / INVOICE. This gives flexibility for open payment processing.
- Catch if you start to gen a field that starts with an invalid character, both full gen and quick gen.
- CLIENTSECURITYSQLMESSAGE implemented to override the current message if a user does not have access to a client.
- More descriptiveness for error 3265 (invalid field in recordset). This helps in troubleshooting missing fields in tables.
- Support for LETTERTEMPLATEHTML on the OUTPUTLETTERTEMPLATE faction to override what's in the letterteplate file.
- On censusbackout of invoice, don't delete censusbillingexception, instead add a D to the end to unlink it from billing. This helps keep an audit trail.
- Update dataimportspreadsheet to handle up to 20000 rows.
- Update to not allow front end login with gvt-master, security fix.
- Support _VALIDATETABLE to force saving a form to validate against a different table (such as CLIENTCONTACT)
- When quick structure update or fullgen, look for ||DATEPICKER|| or class=jdatepicker to determine if it's a date field. This helps gen date fields more properly.
- Fix so if the doc to pdf doesn't work, it will retain the original document name. This is if you set word documents to auto-update to pdfs. Contact your PM if you need this functionality.
- Support for Access Organization in provider hierarchy. This allows providers parallel access to other provider's clients. Contact your PM if you need this functionality.
- Support for NOPROVIDERONSIGNATURE functionality. This keep the provider name out of the electronic signature. Contact your PM if you need this.
- Quick decoding convertoascii function for + to +, then decode64 using internal system functionality. This speeds up Base64 field transfer tremendously.

- Update to quickstructureupdate to accept ALTERLIST and will auto increase text field sizes as necessary.
- Build entire hierarchy upped count to 15000 provider threads.
- Fix for checkbox values over 100 characters not showing properly checked.
- Bug fix testactionsqlquery update to call SQL translator to properly match processing of AQ. This is for testing Action Queue queries.
- Allow OVERRIDEEXTENSION in the bulk export command. Contact your PM if you need to perform bulk SQL exports.
- Plug ADJUSTMENTCODE field when doing a bill with write-offs.
- Process POSTADD/POSTEDIT on INCLUDE and PREINCLUDed files. This allows you to code POSTADD/POSTEDITS into include files. Previously they were not processed.
- Support for CHOICETABLESEARCHVERSION with a value of 2, if set, auto convert to input Ajax with hidden field for working with tablets.
- Support for ||SLIDER|minval|maxval|defval|width|| directive on a form.
- Support for NOLOAD and POSTLOAD added to end of summations. This helps speed up initial rendering of a large form.
- The VS now sets Docrevno to 888 where a merged client is in relationship [number] field to prevent duplicates.
- Fix for dependent event completion date calculations when saving event or restarting a pathway.
- Update for censusreceiptbackout to include the check date as criteria for backout.
- Update to support Spawnnewsession for multiple client support. If you need this functionality, please contact your PM
- Support for security level setting on editing an appointment. Previously security settings for appointments were all or nothing.
- Change bulk export to not use Unicode. This was causing transfer issues with some older systems.
- Improved positioning of the Ajax choice div to avoid scripted form tags.
- Update to encrypt already encrypted fields on a _PRESERVE.
- Update so if table name is blank in sticky note table, won't throw an error.

- Update so quick structure update will change varchar to text as necessary
- ADDTOCLIENTLIST with value YES in parm will add the CLIENTNUMBER to the recent hyperlink list and refresh menu. Contact your PM if you need this functionality.
- Add LOGDATE tracking to LETTERLOG, include hook for pathway checks.
- Scrub filename for GETATTACHMENT to avoid 404 errors. Previously attachments with special characters were causing errors.

Other Non-Specific Form Related Updates

- Updated CKEditor to latest version to work with more browsers, especially when copying and posting images.
- Cleanup pdf gen so stray characters do not generate into the pdf, such as DEVELOPMENTTOOLS.

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Billing Form Update Details

ARNOTES

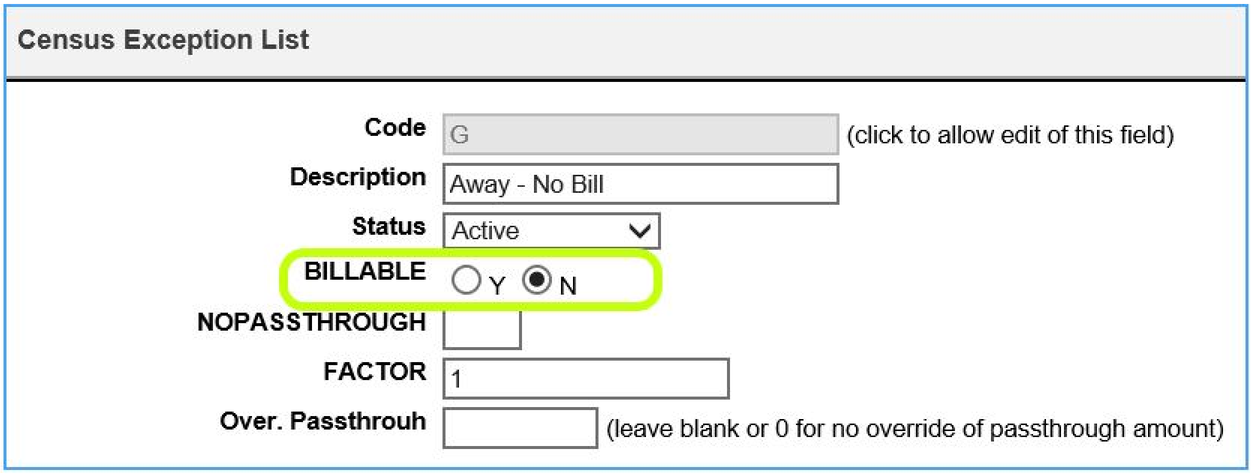
Where to find this form?	Accounting ->AR Notes
Why the update?	Saving to module base live in order to mark for upgrade
What is impacted:	Nothing, this is a new form
What is not impacted:	N/A
Settings to check:	N/A
How to test:	Go to the form and ensure that there are no errors.

CensusBackout

Where to find this form?	Accounting ->Billing Functions ->Back out a Bill
Why the update?	Update to allow backing out selective items on an invoice that has been backed out before. Previously, if ANY transaction on an invoice was backed out, the system would not let you proceed to back out other items. This upgrade allows you to proceed and back out additional items at a different time.
What is impacted:	Alert message the users receive when backing out a bill
What is not impacted:	
Settings to check:	
How to test:	Find (or create) an invoice where at least one item is backed out and one item is not backed out. Then back out the same invoice and verify that you can proceed to the next step with a warning message. The items already backed out will be disabled and others will let you select that item.

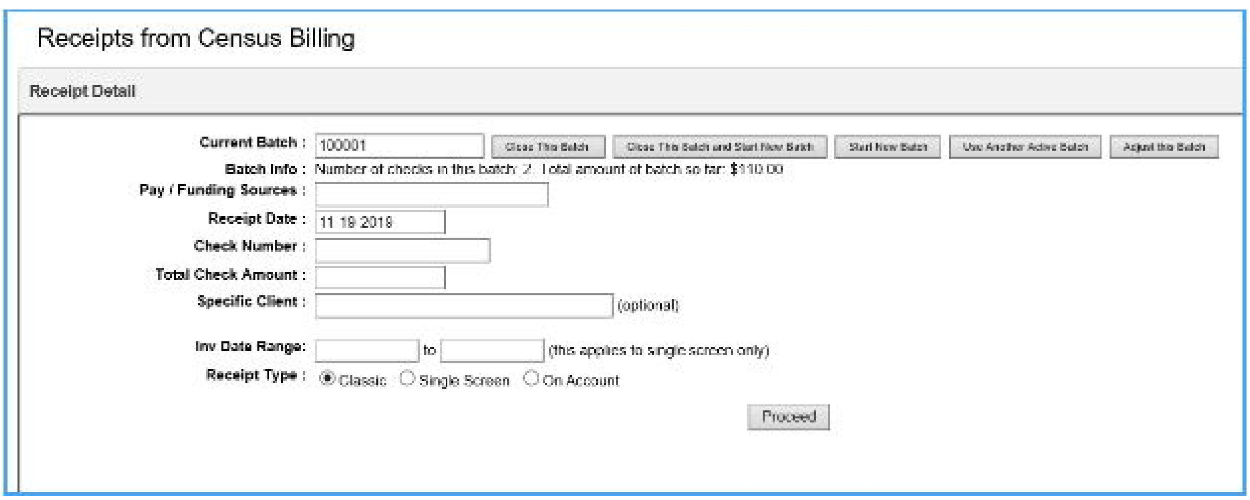
CensusExceptionList

Where to find this form?	Configure ->Customization ->Master Tables, then edit the table CensusExceptionList
Why the update?	Changed the billable field to a radio button with values of Y and N.
What is impacted:	The values being stored in the field will be consistent at Y and N. Old data that does not conform to these values may need to be resaved. The values being stored are Case Sensitive.
What is not impacted:	Nothing
Settings to check:	When the values are updated, ensure the form reloads with the proper radio button selected.
How to test:	Go to Master Tables, and edit the table CensusExceptionList, save some values, and make sure when the record is edited, the proper value is selected.

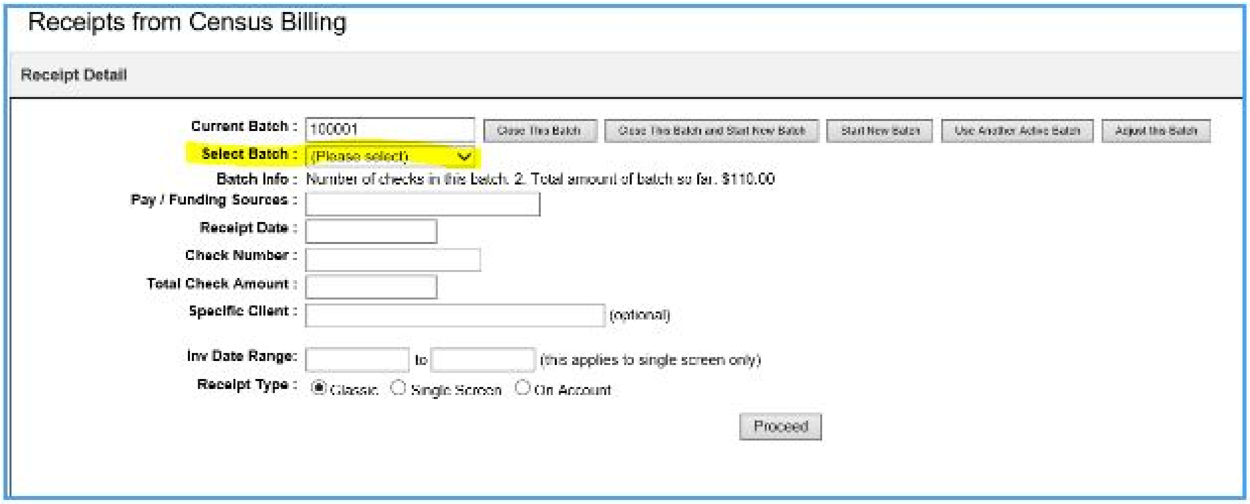


CensusReceipt

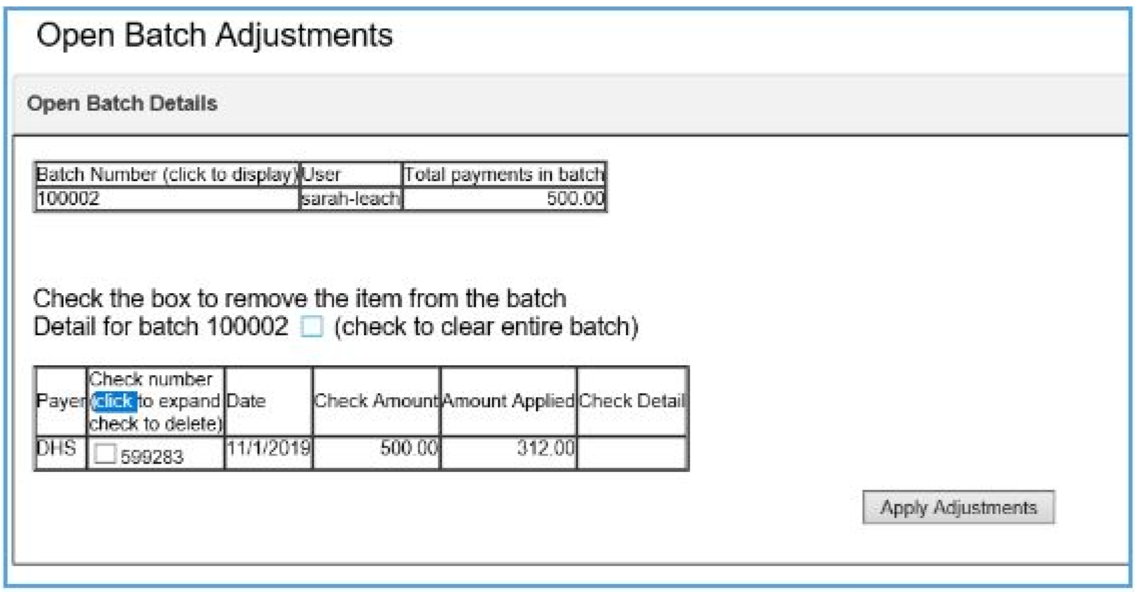
Where to find this form?	Accounting ->Payment Functions ->Adjustments + Payments
Why the update?	This upgrade changes and streamlines how payments are processed. New functionality includes better batch processing.
What is impacted:	
What is not impacted:	
Settings to check:	
How to test:	Navigate to Payments + Adjustments form. Users can now control when batches are closed out, apply payments for one client from the main screen using 'single screen' radio button, and view what is included in batches.



Note that the batch functionality has been moved to the top of the screen. This is for better flow since batches (optionally) are setup and initiated before processing payments. A new button allows you to select another open batch and when you do, a dropdown with all available open batches (including the user id who opened the batch) will show up and you can select that batch for processing:



In addition, you can adjust the batch. When clicking Adjust this batch, a new screen will pop up showing all details of checks entered for the batch:



This example only has one check, but you can clear out the entire batch or individual entries in the detail table. When you apply adjustments, it will be as if the entry was never made. You can only adjust open batches.

In addition to the new batch functionality, you can now process streamlines payments from a single screen on a client by client basis. To do this, fill in the paysource, check information and select a client and click on Single Screen. This will quickly bring up the details for that paysource and client so you can quickly apply a check without changing screens.

CensusReceiptBackout

Where to find this form?	Accounting ->Payment Functions ->Back out a Payment
Why the update?	This has a minor label change to lessen confusion, and also implements the newer style date picker.
What is impacted:	Wording on screen / date pickers
What is not impacted:	N/A

Settings to check:	N/A
How to test:	Navigate to form for backing out a payment. Once there, the first data point should read only to back out a check, with no mention of backing out a batch.

CensusReceiptStep1

Where to find this form?	Accounting -> Payment Functions -> Payments and Adjustments
Why the update?	This screen provides support for a parent funder. If processing payments from a parent funder, invoices for the child paysource will show up during receipts processing.
What is impacted:	Supports Parent Funder functionality. A Parent Funder may be established for several Funding Sources to allow payments from the Parent Funder to satisfy invoices to the sub-funders (e.g. State is parent of County)
What is not impacted:	Has no impact on existing payments or invoices
Settings to check:	Verify that you have at least one Parent Funder relationship established in your Funding Source Maintenance screen
How to test:	Process a payment from a Parent Funder and verify that all Child Funder invoices are displayed

CensusReceiptStep2

Where to find this form?	Accounting -> Payment Functions -> Payments and Adjustments
Why the update?	This screen provides support for a parent funder. If processing payments from a parent funder, invoices for the child paysource will show up during receipts processing.
What is impacted:	Supports Parent Funder functionality. A Parent Funder may be established for several Funding Sources to allow payments from the Parent Funder to satisfy invoices to the sub-funders (e.g. State is parent of County). Also improves scripting to handle large quantities of invoices
What is not impacted:	Has no impact on existing payments or invoices
Settings to check:	Verify that you have at least one Parent Funder relationship established in your Funding Source Maintenance screen
How to test:	Process a payment from a Parent Funder and verify that all Child Funder invoices are displayed

PrivateProviderCensus

Where to find this form?	Accounting ->Billing Functions ->View/Print the Attendance Record
Why the update?	This upgrade is to change the width of the columns to allow 2 character codes by stacking the characters. Please note that this only works with 2 character codes, any more than that will require a customization.
What is impacted:	When generating a PDF for Attendance Record, if there are 2 character codes the spacing will no longer push the total column off of the page
What is not impacted:	Single character codes, and how they format on the report.
Settings to check:	When generating a PDF, the table is not pushed base the margin on the right beyond the printable area.
How to test:	When saving the Census for a client, use an exception code with 2 characters for 3-4 days in a row. Save census. View/Print the Attendance Record and click to generate PDF. When viewing the PDF, ensure the total column is not being pushed off of the page.

ScheduleConfirm

Where to find this form?	FAMCare -> Dynamic Scheduler
Why the update?	This fixes a bug where the billing summary on completed appointments did not always properly show.
What is impacted:	Supports billing from the scheduler
What is not impacted:	Has no impact on scheduling appointments or other calendar functions
Settings to check:	Billing Module Session Variable on
How to test:	Complete a scheduled, billable appointment - if the process works the form is fine

SummationClientRunningBalance

Where to find this form?	FAMCare -> Client -> Client Running Balance
Why the update?	Add ARTRANS.NOTES include in update
What is impacted:	Adds the NOTES field to summation of billing running balance detail
What is not impacted:	No impact to existing records or fields
Settings to check:	none
How to test:	Enter notes on a payment, save payment, pull up Client Running Balance for the affected client and verify notes are present

SummationFLBodyARNOTES

Where to find this form?	Accounting -> AR Notes
Why the update?	Saving to module base live in order to allow to add to upgrade
What is impacted:	Nothing, this is a new form
What is not impacted:	N/A
Settings to check:	N/A
How to test:	Go to the AR Notes menu call and ensure that there is no SQL error caused by the summation

SummationFLBodyBillingModifiers

Where to find this form?	Configure ->Customization ->Master Tables/Dropdown List ->Billing Modifiers
Why the update?	Includes additional fields in the summation.
What is impacted:	Columns within Billing Modifier Summation
What is not impacted:	N/A
Settings to check:	N/A
How to test:	When viewing Billing Modifiers Master Table, users will now see columns for ,Code, Description, Status, KPI Value

SummationFLBodyClaimAdjustmentCode

Where to find this form?	Configure -> Customization -> Master Table -> Claim Adjustment Codes
Why the update?	The AdjustCode field for the ClaimAdjustmentCode is now a dropdown list populated by master table AdjustmentCodes, rather than a text box.
What is impacted:	ClaimAdjustmentCode master table
What is not impacted:	
Settings to check:	Master table AdjustmentCodes must exist
How to test:	Edit master table ClaimAdjustmentCode; summation should load without error. I would only expect an error if the master table AdjustmentCodes does not exist.

SummationFLSearchARNOTES

Where to find this form?	Accounting ->AR Notes
Why the update?	Saving to module base live in order to mark for upgrade
What is impacted:	Nothing, this is a new form
What is not impacted:	N/A
Settings to check:	N/A
How to test:	Go to the AR Notes summation screen and perform some searches to ensure there are no error when searching different criteria

SummationViewInvoiceARTRANS

Where to find this form?	Accounting -> Billing Functions -> View Invoices and Credits
Why the update?	Upgrade to add the Notes to the summation.
What is impacted:	Added NOTES field to the Invoice View
What is not impacted:	Has no impact to any data, does not remove existing fields on summation

Settings to check:	none
How to test:	Navigate to screen, open an invoice, and verify column is present for 'Notes'

AccountCodesAdjustment

Where to find this form?	Configure -> Customization -> Dropdowns / Master Tables -> AccountCodesAdjustment
Why the update?	Update for options and formatting
What is impacted:	This form supports functionality that has to be enabled by GVT to work with a Billing Module. Updates display to make Invoice Type a dropdown, increases field size for queries.
What is not impacted:	Updated screen formatting, no impact to functionality
Settings to check:	N/A
How to test:	Navigate to screen, ensure display has no issues.

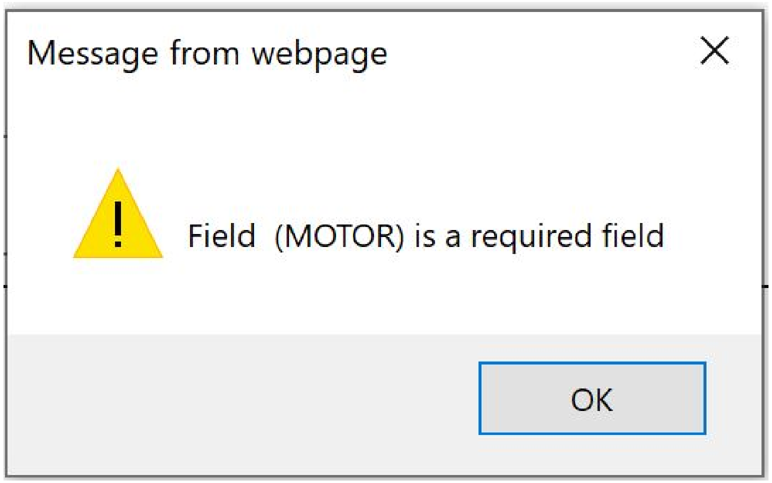
CensusReceiptSaveData

Where to find this form?	
Why the update?	Full Specs -change AJAX to include client number from any position in the # -change on account to radio entry mode classic | single screen | on account classic is default single screen shows filters on screen -bring in appropriate CensusReceiptStep2 lines and buttons -weave in with batch functionality Scenarios to handle: -Company Funding Source (e.g. a county or insurance) -Client is funding source -Client contact is funding source Quote includes a combined 10 hours of work from various resources -design -programming -testing/QA
What is impacted:	
What is not impacted:	
Settings to check:	
How to test:	

Case Management Form Update Details

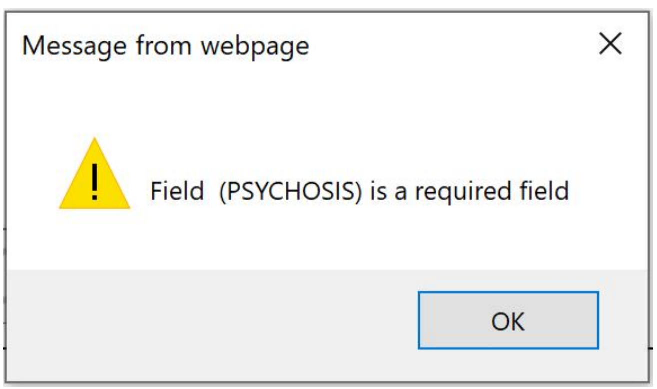
CANSDD

Where to find this form?	FAMCare -> Client Name -> Assessment -> CANS DD
Why the update?	Change the submit code to F-Validate
What is impacted:	Any mandated fields. This will now appear as a webpage alert on save instead of the red screen in a new window.
What is not impacted:	NA
Settings to check:	NA
How to test:	In the data dictionary make several fields mandatory. Then resave the form. If the alert comes up on the current page it is working, if it goes to a red screen it is not working.



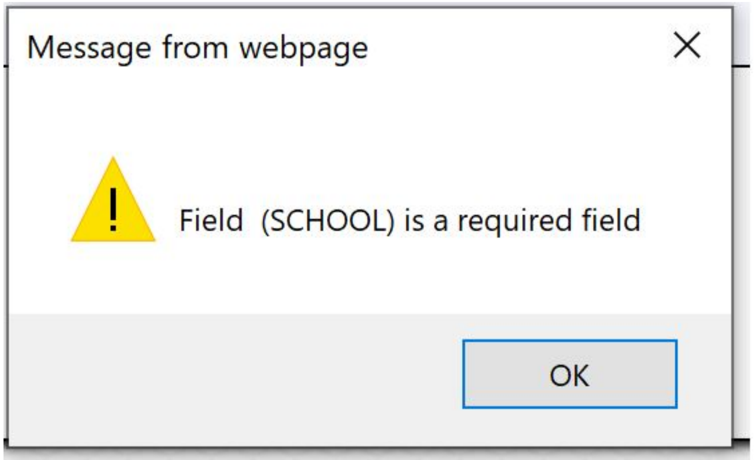
CANSMH

Where to find this form?	FAMCare, Client Name, Assessment, CANS MH
Why the update?	Change the submit code to F-Validate. See Dave for notes for update or upgrade
What is impacted:	Any mandated fields. This will now appear as a webpage alert on save instead of the red screen in a new window.
What is not impacted:	NA
Settings to check:	NA
How to test:	In the data dictionary make several fields mandatory. Then resave the form. If the alert comes up on the current page it is working, if it goes to a red screen it is not working.



CANSSD

Where to find this form?	FAMCare -> Client Name -> Assessment, CANS DD
Why the update?	Change the submit code to F-Validate. See Dave for notes for update or upgrade
What is impacted:	Any mandated fields. This will now appear as a webpage alert on save instead of the red screen in a new window.
What is not impacted:	NA
Settings to check:	NA
How to test:	In the data dictionary make several fields mandatory. Then resave the form. If the alert comes up on the current page it is working, if it goes to a red screen it is not working.



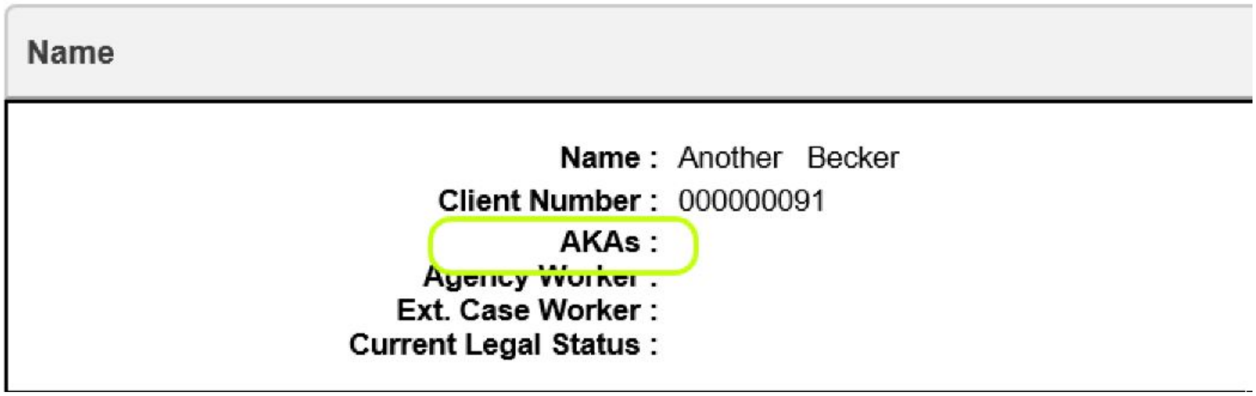
ClientContact

Where to find this form?	Client ->Relationships, Add or edit a relationship record.
Why the update?	Changed Client Status to pull from the table Client Status.
What is impacted:	The Status field on the Client Contact form will match that on the Family Build and the Client form.
What is not impacted:	The Client form.
Settings to check:	Check to make sure the Status values on the Client Contact form when working on a Relationship record are the same as on the Client Demographic form.
How to test:	Add or Edit a Relationship record, and confirm the values in the Client Status field.

```
    <li><strong>Current Status : </strong>
                <select size="1" name="ClientStatus">
                <option value="||Select Code, Description From CLIENTSTATUS Where DocRevNo = ' 0 '
AND PrivateProvider='^^PRIVATEPROVIDER^^' AND ((Status='Active' or Status='' or Status='1') or
Code='^^FIELDVALUE ClientStatus^^') Order By description||"
selected="selected">||CHOICETABLESQLD||</option>
                </select></font>||CONFIGURE CLIENTSTATUS||
    </li>
```

ClientHeader

Where to find this form?	FAMCare -> Client -> Intake/Demographics -> Facesheet
Why the update?	Moving AKA under client name - Cosmetic change
What is impacted:	N/A
What is not impacted:	N/A
Settings to check:	N/A
How to test:	See if AKA is under client name



ClientheaderNoPhoto

Where to find this form?	No Menu call. This is a new client header that does not include the photo of the client
Why the update?	New Header form as an option for pathways. This has remove the phone and included household information on the form.
What is impacted:	N/A
What is not impacted:	N/A
Settings to check:	N/A
How to test:	In the form maintenance table search for the form and hit preview from the summation. This form will not work unless you have the following SV in the system: CLIENTCITIZEN CLIENTHOUSEHOLDSIZE MONTHLYINCOME MARITALSTATUS CLIENTEMPLOYMENTSTATUS

CLIENTPRINT

Where to find this form?	No Menu Call - Hidden form to make the client form print.
Why the update?	Change the submit code to F-Validate. See Dave for notes for update or upgrade
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	Print the client form from the top button. The layout should be formatted in a printable format.

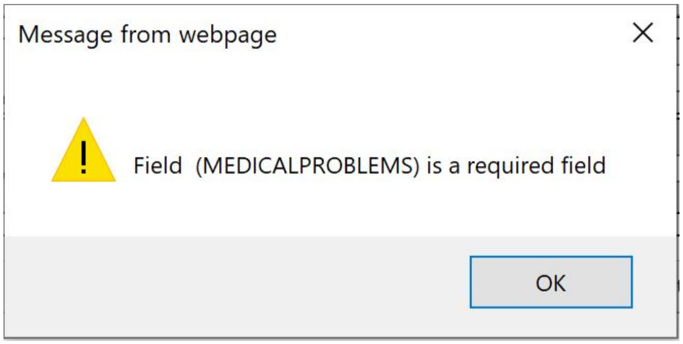
Correspondence

Where to find this form?	FAMCare -> Client Name -> Correspondence/Letter Template/Resume Builder -> Add Correspondence/Letter Template/Resume
Why the update?	This upgrade fixes style mismatches from what is shown on the screen compared to what is generated for the pdf. There is also a log date to help track the date of the correspondence. This is the current date and is a new field in the table.
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	Generate a new letter and make sure the layout and formatting match the form being built. Query the Letter Log table to verify the log date is being filled in.

DischargeSummary

Where to find this form?	FAMCare -> Client Name -> Case Management -> Discharge Summary
Why the update?	This upgrade causes the form to submit in a way that if errors are present, a popup will

	display the message instead of a red box on a subsequent screen.
What is impacted:	This will change the alert message for mandated fields in the Data Dictionary. Instead of getting the red screen you will now receive a normal web page alert.
What is not impacted:	NA
Settings to check:	NA
How to test:	Make a field in the DD required. From there go back to the form and save without that fields being addressed. Instead of the system taking you to a new screen with the field in red, you should receive a standard web page alert that allows you to retain all inputted data with a message to fill in that field or fields and resave the form.

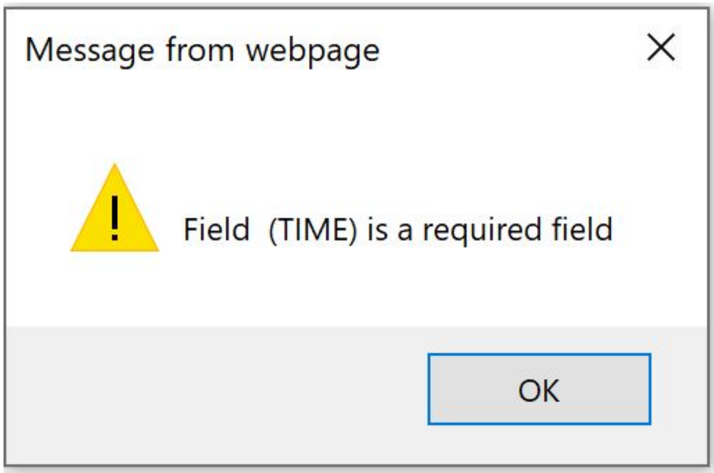


FamilyBuildV2

Where to find this form?	FAMCare, Client Name, Family Relationship Contact Wizard
Why the update?	This fixes a bug where head of household was not always saving properly.
What is impacted:	The Relationship summation on the client form will populate the head of household
What is not impacted:	NA
Settings to check:	NA
How to test:	Load a family via the Family Relationship Contact Wizard and set the head of household. Make sure the client is included as a member of the household for them to appear.

GenericIncidentReport

Where to find this form?	FAMCare, Client Name, Incident Reports, Incident Reports
Why the update?	Promoted from w_: Prev. Notes: updating to submit the form to fvalidate on save so as not to lose work when a save fails.
What is impacted:	This will change the alert message for mandated fields in the Data Dictionary. Instead of getting the red screen you will now receive a normal web page alert.
What is not impacted:	NA
Settings to check:	NA
How to test:	Make a field in the DD required. From there go back to the form and save without that fields being addressed. Instead of the system taking you to a new screen with the field in red, you should receive a standard web page alert that allows you to retain all inputted data with a message to fill in that field or fields and resave the form.



GeoMapRelationship

Where to find this form?	Mapping Relationship Hyperlink on the client form in the Relationship summation.
Why the update?	Refer to GeoMap form
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	Refer to GeoMap form

NIDAASSIST

Where to find this form?	FAMCare, Client Name, Assessments, NIDA Assist Assessment
Why the update?	updating form to replace parenthesis i f.elements inside of functions with brackets in order to allow cross browser compatibility
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	Save the record in all browsers and make sure all of the scores populate under the correct summation headings.

ProviderWings

Where to find this form?	Configuration==>Security==>Provider Setup, Search for a Provider, and then click on the Wing option.
Why the update?	Cleaning up form.
What is impacted:	This is part of the overall improvements being made to the Provider Wing setup and option on the Placement form. This change has no impact to the user experience other than esthetics on the form.
What is not impacted:	The functionality of the Provider Wing setup.
Settings to check:	That the form works properly, and values save as they should.
How to test:	Enter a new record, and ensure the summation refreshes properly, and the data is saved. Then do an edit of the record, and reconfirm the summation refreshes properly, and the data is stored properly.

PWFosterParentRecruitmentAndPreCertInfo

Where to find this form?	FAMCare ->Client Name -> Intake/Demographic ->Foster Parent Placement Inquiry Recruitment Log (will only appear in the FA module is on and the client is a provider.
Why the update?	Mismatched tag issues causing the form to not always display properly.
What is impacted:	There was Bold tags inserted where there should have been strong tags.

What is not impacted:	NA
Settings to check:	NA
How to test:	Open the form and put the percentage at 100% and make sure all of the gender, provider, and referral source and orientation date are aligned.

RelationshipFrame

Where to find this form?	FAMCare ->Client ->Case Management -> Contacts / Relationships, Click on the name of an existing Contact/Relationship.
Why the update?	Added jQuery library references. This fixes a script error.
What is impacted:	The user experience so there are no errors while the form is loaded.
What is not impacted:	Nothing
Settings to check:	That the full Add option works properly.
How to test:	Navigate to Contacts / Relationships, Click to Add a New Relationship, search for an existing record, and click on a name of one of the results. Check to ensure there are no other options available for the user to select or click on while the form is being pulled up.

ResidentialIncidentReportSearch

Where to find this form?	FAMCare -> Client Incident Reports
Why the update?	Added the Reset Button to allow the user to clear the search criteria with one click. This will allow them to perform multiple searches quickly without have to delete information in each field.
What is impacted:	The summation search options now has a reset button to clear the values if the user has to do multiple searches.
What is not impacted:	N/A
Settings to check:	N/A
How to test:	Enter search options into the fields and then click the Reset option. All of the search options will reset to their base values.

SearchContact

Where to find this form?	FAMCare ->client ->Case Management -> Contacts / Relationships, Click to Add a New Relationship, search for an existing record, and click on the name of search result.
Why the update?	Added wait screen for New Contact function. Include in Update. This will prevent the user from hitting any other options while the form loads with the ClientContact form.
What is impacted:	The user experience so they cannot interrupt the form loading with a click of any other option.
What is not impacted:	Nothing.
Settings to check:	That the full Add option works properly.
How to test:	Navigate to Contacts / Relationships, Click to Add a New Relationship, search for an existing record, and click on a name of one of the results. Check to ensure there are no other options available for the user to select or click on while the form is being pulled up.

SearchScreenHR

Where to find this form?	Configure, Security. Employee HR and External Worker Setup
Why the update?	Remove duplicate Hierarchy button for the external work summation
What is impacted:	The search option on the HR search screen. The top summation searches for HR Records link to User id and the bottom summation on searches for workers who are not a part of the agency.
What is not impacted:	NA
Settings to check:	NA
How to test:	Go the search screen and enter a name. Hit the search button on the top and bottom section and make sure each summation populate independently.

SummationFLBodyFormsSecurity

Where to find this form?	Configure > Security > Individual Forms Security Streamlined.
Why the update?	Update for streamlined security setup
What is impacted:	
What is not impacted:	Old methods of setting up forms security are still available.
Settings to check:	
How to test:	Navigate to the new menu call, and search for a group of forms such as *provider*. Select multiple forms and click Security. Set security levels for a few groups and then verify that the security was applied properly to the forms selected (by using the old Individual Forms Security).

This new form allows you to search and select multiple forms at one time to set security. You will get a search prompt first:

Once you click Search, you'll see a list of forms with checkboxes along with security groups and levels set up for each:

Select one or more forms where you want the security to be EXACTLY the same and then click on the Security button:

Set the security as you would on a single form and click Apply. This will apply the security settings to all the forms you selected.

SummationFLBodyGroupEmailList_Base

Where to find this form?	Configure, Customization, Master Tables / Dropdown List
Why the update?	added email address to the summation
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	Load the GroupEmailList master table and save a record. The email address should now appear in the summation.

SummationFLBodyNIDAASSIST

Where to find this form?	FAMCare, Client Name, Assessments, NIDA Assist Assessment
Why the update?	Added center tags and loaded score values for each measure. This will avoid users' having to drill into each form to see the total scores for each section.
What is impacted:	Added the scoring results to the summation so the end users do not have to drill into the record to assess the client. They can see everything from the summation.
What is not impacted:	NA
Settings to check:	NA
How to test:	Complete a form and insure the summation populate with the scores on the final page before closing the form.

SummationFLSearchFormsSecurity

Where to find this form?	
Why the update?	Update for streamlined security setup, see form SummationFLBodyFormsSecurity for details.
What is impacted:	
What is not impacted:	
Settings to check:	
How to test:	See form SummatipnFLBodyFormsSecurity

SummationFLSearchSCANFORMS

Where to find this form?	FAMCare > Client Name > Case Management > Scanned forms/External Documents. Note that this may be named slightly differently on your system.
Why the update?	Update to add date for initial scan.
What is impacted:	Drag/drop functionality for external forms, plus the file selector on the scan forms summation.
What is not impacted:	Manually opening up a single scanned document record has not been changed.
Settings to check:	None
How to test:	Drag or select a file on the main summation. You will see a date (default of today) just before the document type. Change the date, select a document type, then open up the document to verify the date was applied.

SummationHRFORMUserEntries

Where to find this form?	Configure > Security > Employee HR and External Workers,
Why the update?	Promoted from w_: added contact information and address to the summation
What is impacted:	There are new summation heading in the search results.
What is not impacted:	
Settings to check:	
How to test:	The search results will now show move information. The heading include: Status, Provider Name, Address, Contact Information, FAMCare Userid

Summationoffensehistory

Where to find this form?	
Why the update?	Update to fix tags, was causing pdf's to not generate properly.
What is impacted:	Any form that includes this summation
What is not impacted:	
Settings to check:	Make sure settings are properly set to include this summation on the client form. (LEGALMODULE=YES)
How to test:	Navigate to the client form and generate a pdf of the form. Make sure this section looks ok in rendered pdf.

UserMySummaryMaster_BASE

Where to find this form?	Configure > Customizations > Master Tables
Why the update?	Update to fix test button.
What is impacted:	
What is not impacted:	
Settings to check:	
How to test:	Open up the UserMySummaryMaster table from the Master Tables screen. Click to View one of the items, click the Test button to ensure it works properly.

ClientSearchParameters_BASE

Where to find this form?	FAMCare>Client Search
Why the update?	Removing name (the column heading from the pulldata) as a selection in the dropdown
What is impacted:	The list of fields that shows up for selection when adding a custom search option
What is not impacted:	N/A
Settings to check:	Talked with Jeff, Use template NOTE: We need to include NOSEARCHPARM SV and the values in template. DB
How to test:	Go to the client search screen and access the option to add a custom search parameter. Then hit add and ensure that name does not appear at the top of the field list as a possible selection

LetterTemplate

Where to find this form?	Configure > Letter Templates.

Why the update?	Use style sheet that matches the html editor. This makes the letter template pdf better match what is on the screen. See Correspondence for more detail.
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	Navigate to a letter template and verify the preview matches up well with what's on the screen.

SummationFLBodyPROVIDERPLACEMENTFA

Where to find this form?	
Why the update?	Fix HTML tag error - change closing td to th
What is impacted:	
What is not impacted:	
Settings to check:	
How to test:	

TwillioBroadcastMessager

Where to find this form?	FAMCare, Twilio Texting
Why the update?	Promoted from w_: Formatted the form for better workflow and data entry. Added borders, workflow, configure option.
What is impacted:	Changed the layout to make it flow better. There is just a different view, not functionality changes.
What is not impacted:	NA
Settings to check:	NA
How to test:	Search for names based on provider and enable configure mode to make sure you can configure the heading.

Pathways Form Update Details

PathwayFormWizardEmailTemplate

Where to find this form?	No Menu Call
Why the update?	The post add was misspelled (EMAILPDFLINK). Jeff made the change in SourcePoint, notified Dave and we have made the changes in template. Please use the form in template for the next upgrade/update.
What is impacted:	This will allow the Email function to work correctly for a PDF on form generated from Pathways.
What is not impacted:	NA
Settings to check:	NA
How to test:	Create a form via Pathways Form builder and email the form using the PDF checkbox on the form that as the Email section loaded to it.

PathwayMaster

Where to find this form?	FAMCare -> Client Name -> Master Pathway Dashboard
Why the update?	Update to show the long description of a pathway event when hovering over the timeline.
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	Create a pathway event and make sure the long description and short description are different. Load a pathway with that event and see if the hover options brings in the long description.

PathwayMasterMarkoffHard

Where to find this form?	FAMCare -> Client Name -> Master Pathway Dashboard

Why the update?	Change to only complete the one item, not recurring items. Before, when marking recurring items, all of the recurring items were marked complete.
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	Manually sign off an event from the dashboard. From there the one event should be completed and not recurring items. Before, when marking recurring items, all of the recurring items were marked complete.

SummationFLBodyPathwayDetail

Where to find this form?	Configure -> Pathways -> Pathway
Why the update?	Adding new SummationFLBodyPathwayDetail with new summation fields
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	There are new heading in the summation to give the user more description of the event: Start Period, End Period, Early Period, Late Period, Recurring Period, Lag Period, # of Occurrences, Table to be Checked

SummationFLBodyRace

Where to find this form?	Configure -> Customization -> Master Table / Dropdown List -> Race
Why the update?	removed the Analysis Group from the summation
What is impacted:	The summation no longer has the Analysis Group option.
What is not impacted:	NA
Settings to check:	NA
How to test:	Go to the Race master table summation via the master table list and make sure Analysis Group does not exist in the heading.

DynamicLayout

Where to find this form?	No Menu Call. Is part of the new pathway form wizard improvements
Why the update?	Update for slider and spacing options. Update for logo, hr dropdown
What is impacted:	Will development one list with all of the details.
What is not impacted:	NA
Settings to check:	NA
How to test:	There are new options for laying out of form: Slider, Small General Text/Spacer, Header and Attachments.

TEMPLATECLIENTFORMPATHWAY

Where to find this form?	Configure -> Pathways -> Pathway Form Wizard
Why the update?	Update to submit to fvalidate, disable/enable buttons. This is the template for the spreadsheet version of the form wizard.
What is impacted:	N/A
What is not impacted:	N/A
Settings to check:	N/A
How to test:	Navigate to the form wizard and either save an Excel form of the wizard or regen a form that uses the Excel version of the wizard. Create an error on the form when saving (such as too many characters in a one line text field) and verify that an error pops up instead of a new screen with a red box. After the error pops up, the Save button should be re-enabled.

TEMPLATEPATHWAYFORM

Where to find this form?	Configure -> Pathways -> Pathway Form Wizard
Why the update?	Update, Chris needs to research, possibly fixing formatting issue, need header as first section. Update to submit to fvalidate, disable/enable buttons, include in update for hide feature. Update to hide buttons when clicking Save.
What is impacted:	N/A

What is not impacted:	N/A
Settings to check:	N/A
How to test:	Navigate to the form wizard and either save a New Drag/Drop form or regen a form that uses the Drag/Drop version of the wizard. Create an error on the form when saving (such as too many characters in a one line text field) and verify that an error pops up instead of a new screen with a red box. After the error pops up, the Save button should be re-enabled.

System Function Form Update Details

ClientFormReportBuilder

Where to find this form?	Reports -> Visions Query Designer Suite (or Report Building) -> Data Extractor
Why the update?	This is a bug fix where extra tables would not properly show up on the form.
What is impacted:	Only systems where a Data Extractor is installed, many systems do not have this functionality.
What is not impacted:	N/A
Settings to check:	N/A
How to test:	Navigate to this menu option and select one of the submenus on the left. Verify the list of menu items shows up under your selected submenu.

DICTIONARYDELETE

Where to find this form?	Configure -> Customization -> Data Dictionary
Why the update?	New form to support deletion of data dictionary table
What is impacted:	Data Dictionary Summation
What is not impacted:	NA
Settings to check:	NA
How to test:	Search for a pathway form in the data dictionary that is not being user. Hit Delete on the summation and see if the form is removed.

GeoMap

Where to find this form?	No Menu Call
Why the update?	This upgrade adds a title to the marker.
What is impacted:	Only systems where geo mapping has been enabled. Contact your GVT Project Manager if you are interested in this module.
What is not impacted:	NA
Settings to check:	Session variables: - GoogleMapsKey - MappingModule Database functions + stored procs - sp_ClientUpdated - udf_CalculateDistance - udf_GeoMapFAClientProvGrid - udf_GeoMapProviders - udf_GeoMapRelationship - udf_RelationshipGeoCode - udfCalculateDistanceFromZip Database table updates - ALTER TABLE Client ADD [Latitude] float NULL, [Longitude] float NULL - ZipCode table with latitude + longitude Other objects - pin[COLOR].png files in images folder of website - Action Queue for insert/update of Client
How to test:	Refer to the screenshot for compete testing script.

This test script walks through all the functionality of the Mapping Module, which is going out in this upgrade.

--- Setup
1. Set session variable **CLIENTMAPPINGMODULE** value to **YES**

2. Set session variable **MAPPINGMODULE** value to **YES**

-- Test Client screen
3. Edit client demographics screen for any client.

4. Scroll down to *Identifying Information* and enter a valid address in the Street, City, State, Zip fields.

5. Click the *Retrieve latitude/longitude* link.

6. **Verify that numbers populate in the Latitude and Longitude boxes.**

7. Click *Show on Map* link

8. Drag the red pin.

9. **In the two boxes at top left, verify that the numbers change as you drag the pin.**

10. Click *SAVE* button.

11. Save the Client record.

--- Test Caseload dashboard
12. Click *Home*

13. If the Case Load summation does not contain a *Map Home Address* column, click *Configure* and add *Map Home Address* to your configuration.

14. A Google Maps icon should appear in the *Map Home Address* column for the client you edited above. Click the icon.

15. **Verify that you see a map with a red pin where this client's address is located.**

16. Back on the home page, scroll down and **verify that a map appears on the bottom on the screen with pins for any clients who have mapped addresses.**

17. Under the map is a table with Client info, including a distance in the *Distance from [Provider]* column. If there is no distance here and/or no provider name in the column header, you will have to set the location for your provider (the provider that your userid belongs to). To set your provider's location:
- a) Configure > Security > Provider Setup
- b) Search and locate your provider, and edit the provider
- c) Enter a valid address in the Address, City, State, Zip fields, if an address is not already there.
- d) Click *Retrieve latitude/longitude*. Numbers will appear in the Latitude and Longitude boxes
- e) Save the Provider
- f) Return to home page and check the *Distance From [Provider]* column again

--- Test Provider screen
18. Configure > Security > Provider Setup

19. Select any item in the *Provider Service(s)* list at the middle right of the screen. If no providers are found, try another type of service until you get results.

20. If you see a *Map* column in the results with the word "Map" in the column that means a providers location is mapped. If there is no *Map* column, then none of the providers are mapped.

21. Edit any provider. If you have a mixture of mapped and unmapped providers, select one of the unmapped ones.

22. Enter a valid address in the Address, City, State, Zip fields, if an address is not already there. *Make note of the zip code for step 30*

23. If there are not already numbers in the Latitude and Longitude boxes, click *Retrieve latitude/longitude*. Numbers will appear in the Latitude and Longitude boxes

24. Click *Show on Map* and verify that a red pin appears at the location.

25. Save the provider.

26. Repeat your search from step 19. **Verify that the provider has a *Map* link in the results.**

27. Click the *Map* link. **Verify that you get a map with a red pin at the provider's location.**

28. Back on the search results page, click the *Display Providers on Map* link. **Verify that you get a map with all providers' locations, with a table of provider info under the map.**

29. Click the *Click here to return to Provider Search Screen* button.

30. Enter the zip code from step 22 in the *Zip* box.

31. Enter "1" in the *within ___ miles* box.

32. Click the *Click to Perform Search* button and **verify that the provider from steps 21-25 appears.**

--- Test Client Relationships
33. Go to the client demographics page a client who has one or more relationships defined.

34. If the client does not already have Latitude/longitude defined, assign a location by repeating steps 4 - 5, and save the Client's record.

35. Scroll down to the *Client Relationships* section of the client demographics page.

36. The *Map* column at the right will have a *Map* link for the client. **Click this link and verify that a map appears with a pin for the client's address.**

37. If none of the client's relationships have a *Map* link, edit at least one of them and set a location as in steps 4 - 5.

38. Click the *Map Relationships* link, at the top left of the relationship summation. **Verify that a map opens with pins for all mapped relationships**

GeoMapAdjust

Where to find this form?	No Menu Call
Why the update?	Refer to GeoMap form
What is impacted:	NA
What is not impacted:	NA

Settings to check:	NA
How to test:	Refer to GeoMap form

GeoMapFAClientProvGrid

Where to find this form?	No Menu Call
Why the update?	Refer to GeoMap form
What is impacted:	NA
What is not impacted:	NA
Settings to check:	
How to test:	Refer to GeoMap form

GeoMapProviders

Where to find this form?	Configure -> Security -> Provider
Why the update?	Refer to GeoMap form
What is impacted:	NA
What is not impacted:	
Settings to check:	Required database structure update: ALTER TABLE Provider ADD [Latitude] float NULL, [Longitude] float NULL
How to test:	Search providers by zip code and distance, click DISPLAY PROVIDERS ON MAP. Also refer to GeoMap form.

GETGEOCOORD

Where to find this form?	No Menu Call
Why the update?	Refer to GeoMap form
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	Refer to GeoMap form

QWIZARDV2

Where to find this form?	Reports, Report Building, Advanced SQL Report Writer / Quick Report List
Why the update?	Updated the form to include a dropdown for the data dictionary. If you are writing a report this will give you access to the DD by selecting the table. From there you can find the fields and master tables to join too. Developers will no longer have to go through menu calls to get to the form. PM's will just need to give the table names to the developer.
What is impacted:	NA
What is not impacted:	NA
Settings to check:	Na
How to test:	Updated the form to include a dropdown for the data dictionary. If you are writing a report this will give you access to the DD by selecting the table. From there you can find the fields and master tables to join too. Developers will not long have to go through menu calls to get to the form. PM's will just need to give the table names to the developer. This was part of a developer day task with Chris. Internal idea so it can go to everyone.

SaveError

Where to find this form?	N/A
Why the update?	Update to handle errors on slim forms
What is impacted:	Only sliimforms, full functionality forms that popup in the main window as opposed to a new window.
What is not impacted:	N/A

Settings to check:	N/A
How to test:	Navigate to any slim form in the system. Note that these are generally custom forms, not standard form, so your system may not have any. The security groups' form is a slim form but you cannot test with this form. Once you find a slim form, open it up and attempt to generate a save error (such as typing too many characters in a field) and click Save. The error message will now display properly.

TableFunction_uf_AppointmentsByUserDate

Where to find this form?	N/A
Why the update?	Updated table function uf_AppointmentsByUserDate
What is impacted:	The calendar reports
What is not impacted:	N/A
Settings to check:	N/A
How to test:	Run a calendar report for a large date range and ensure that there is no SQL error that is returned

ActiveSessionFormulas

Where to find this form?	Configure ->Customization ->Session Variable Search Option
Why the update?	Made text areas wider.
What is impacted:	The width of the field that holds the Variable Formula was narrow, so made it wider for convenience.
What is not impacted:	Nothing
Settings to check:	When updating a Session Variable Formula, the field is wide now, and easier to use.
How to test:	Navigate to the Session Variable Search screen, search for or Add a Session Variable, and ensure the field that holds the Variable Formula is wide enough to work with.

DevelopmentTools

Where to find this form?	No Menu Call
Why the update?	Update to allow sorting and highlighting of queries by run time
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	When development tools are on, a user can hit SQL Statements Run >Click to sort queries by run time

DictionaryMaintenance

Where to find this form?	
Why the update?	Update to allow deletion of tables. See Dictionary Delete for details.
What is impacted:	
What is not impacted:	
Settings to check:	
How to test:	See Dictionary Delete for details.

FormMaintenanceDynamic

Where to find this form?	NA
Why the update?	Update to not allow commas in multi-select items, change to semi-colon. This will add the character limit changes, size issue on fields and the PDF print option. New option for small spacer, slider, log image and dynamic HR form entry.
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	This change will enhance the PDF print option, character limits, special characters and size issues when generating a form. To test, navigate to the Pathway Form Wizard and

	use the drag/drop to create a form with these new items. Preview to make sure the form operates smoothly.

FormSecuritySet

Where to find this form?	N/A
Why the update?	Streamlined security setup, see SummationFLBodyFormsSecurity.
What is impacted:	N/A
What is not impacted:	N/A
Settings to check:	N/A
How to test:	See SummationFLBodyFormsSecurity.

FORMSSECUREBYUSER

Where to find this form?	Configure > Security > Individual Form Security (Forms) - The menu call could be different based on the age of the system.
Why the update?	Users who are set to Unlimited do not appear in this list.
What is impacted:	When setting form security for individual users there will be a message stating that user set to Unlimited Security Group will not appear in the list. Since they are set to Unlimited, there is no need to include them in list.
What is not impacted:	NA
Settings to check:	NA
How to test:	Click on Configure, Security, and Individual form security. Enter Client in the text box and hit Go. From there you should see the following message at the top of the page. Users who are set to Unlimited do not appear in this list.

FunctionChoiceSearch

Where to find this form?	N/A
Why the update?	Supports CHOICETABLESEARCHVERSION of 2 for ajax, include Update to do proper callbacks on chosen fields, suppress single choice auto-select
What is impacted:	All screens where CHOICETABLESEARCH directive is used.
What is not impacted:	
Settings to check:	Set SV CHOICETABLESEARCHVERSION to 2. If in development mode, switch to development mode.
How to test:	Navigate to a form (such as client) that uses this directive. Verify that you can select case managers using the new interface.

FunctionOpenHyperlink

Where to find this form?	
Why the update?	Update to mimic open hyperlink to use wait frame to avoid popup issue with site. Added user id to see who you are mirroring. This is controlled by the SV USER to allow the user to see who they are while mirror other user for supervisor or billing signoff process. Currently the SV is in development mode only but could be activated during live testing before rollout.
What is impacted:	N/A
What is not impacted:	N/A
Settings to check:	Make sure you are in development mode to activate the SV USERID.
How to test:	Mirror a user in development mode and verify the userid shows up on each screen at the top. The wait frame testing is done by logging in with an iPad and verifying the screens that open up in a new window show up properly.

LOG

Where to find this form?	Configure > Logging > Usage
Why the update?	Update to put sort option on SQL render steps area.
What is impacted:	
What is not impacted:	
Settings to check:	
How to test:	Open up a log where high logging is in place (you can turn on development tools and

	navigate to a few screens). There

On the log, there is a new link in the SQL Steps area:

If you click it, it will show all the queries sorted by run time (descending):

QUERYTABLEGROUPS_BASE

Where to find this form?	Configure -> Customization -> Intermediate Ad-Hoc Setup
Why the update?	Update to more standard interface
What is impacted:	Intermediate Ad-Hoc
What is not impacted:	No other reporting tools are affected.
Settings to check:	
How to test:	Navigate to the menu option and open up one of the groups. You should be able to easily add a table to a group using standard summation interface.

The new combined form (after selected a query group) is all on one screen:

QUERYTABLEGROUPSMAIN_BASE

Where to find this form?	N/A
Why the update?	See QueryTableGroups_Base
What is impacted:	N/A
What is not impacted:	N/A
Settings to check:	N/A
How to test:	See QueryTableGroups_Base

QuickReportRunOnce

Where to find this form?	N/A
Why the update?	N/A
What is impacted:	New HR module
What is not impacted:	N/A
Settings to check:	N/A
How to test:	This supports calling a quick report directly from the menu. There is nothing to test.

QWIZARDV3

Where to find this form?	Reports, Report Building, Intermediate Report Writing.
Why the update?	Updated from template.
What is impacted:	This will give a new look and feel to the Intermediate Ad Hoc. It will organize the tables in alpha order, forms (table) will be in bold and master tables will be in italics. Any more to an existing site will take a package installed by Chris.
What is not impacted:	NA
Settings to check:	NA
How to test:	Navigate to the menu call and insure the new query groups created are there and have the table in the correct view with the forms being in bold and master tables being in italics.

SaveconfirmrefreshUserCopy

Where to find this form?	N/A
Why the update?	This goes with the User copy function and testing is covered in that form.
What is impacted:	N/A
What is not impacted:	N/A
Settings to check:	N/A
How to test:	This goes with the User copy function and testing is covered in that form.

SummationDictionary

Where to find this form?	Configure, Customization, Data Dictionary
Why the update?	Added Center tags.
What is impacted:	We have added a delete option to the summation.
What is not impacted:	NA
Settings to check:	NA
How to test:	Go to the menu call and see if the delete option appears in the summation.

SummationFLBodyLogEmail

Where to find this form?	
Why the update?	Added date range search option from another site. You can now search the email log based on a date range.
What is impacted:	
What is not impacted:	
Settings to check:	
How to test:	

SummationFLBodyQUERYTABLEGROUPS_Base

Where to find this form?	N/A
Why the update?	See QueryTableGroups_Base
What is impacted:	N/A
What is not impacted:	N/A
Settings to check:	N/A
How to test:	See QueryTableGroups_Base

SummationFLBodyQUERYTABLEGROUPSMAIN_Base

Where to find this form?	N/A
Why the update?	See QueryTableGroups_Base
What is impacted:	N/A
What is not impacted:	N/A
Settings to check:	N/A
How to test:	See QueryTableGroups_Base

SummationFLSearchLogEmail

Where to find this form?	
Why the update?	Added date range search option for the email log. Updated from NFC and added the Added the wait graphic.
What is impacted:	
What is not impacted:	
Settings to check:	

How to test:	

SummationFormMaintenance

Where to find this form?	Configure -> Customization -> Form
Why the update?	Adding sort calls to the summation heading.
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	You can no search the form search by saved by, file date/time and form name

UserAuthentication

Where to find this form?	N/A
Why the update?	Update to disable buttons while the key is being processed. This helps the user understand that the validation is in process when the proceed button is clicked.
What is impacted:	NA
What is not impacted:	NA
Settings to check:	NA
How to test:	Login to a fresh site that uses Multi-factor authentication, or have a developer remove your user authentication record via the back end. After you get your key, enter it and click continue. You should see the continue button be disables as the login occurs.