



# FAMCare

**RAPID CASE MANAGEMENT**  
powered by, Global Vision Technologies



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# Introduction

GVT is a privately-held, debt-free, I.T. consulting and software development firm with an established successful track record of consulting and partnering with agencies that need a better way to manage their data. We've been serving organizations in the healthcare and human services industries for 15+ years and were the first company to build and implement an enterprise, web-based case management system when everyone else was still working with stand-alone systems.

By providing web-based, HIPAA compliant solutions we afford agencies the ability to manage all types of sensitive data related to clients, children and families under their care. Clients include enterprise-level state organizations (like DHS agencies – 10,000 users+), large universities, consortiums, county and city agencies, and non-profits of all disciplines and sizes, including those that may have only a few users.

The GVT team is comprised of subject matter experts in I.T., software development, project management, human services and training, with experience in case management, change management, and phased rollouts/implementation. Our secure, HIPAA compliant systems help human services and healthcare agencies truly understand their data and have it delivered and managed in an easy to act-upon way.

Our development platform – Visions Server, provides an ideal foundation for our team to tailor and deliver a working system, faster than other teams that program with raw HTML and JavaScript. And because we choose to work as a dedicated partner and not a vendor - the combination of our technology, project management, our support / training team and our attitude – provide clients with a clear understanding of the value we bring to all projects. For the reasons listed above, clients and partners have come to trust our expertise in delivering secure web-based, custom tailored human services case management and patient registry applications.

GVT's mission is to help organizations whose primary goal is to help children, families and patients under their care. We do this by introducing them to sophisticated information management tools that make their lives easier and keep them in front of critical data. This in turn helps them make better decisions while improving the outcomes for their clients.

## Purpose

This manual was created to help users understand the base functionality within the FAMCare system. This will not reflect any customizations or changes made to the system, as determined by your system administrator. This document is not designed to be technical and provide SQL or .Net understanding.

## Hardware and Software Requirements

Please make sure the computer will allow pop-ups. The system is compatible with Windows and Macintosh products. Browser applications such as Firefox, Google Chrome and Microsoft Edge are acceptable. The application will use these applications to export documents and to edit documents.

## Client Minimum Specifications for FAMCare® Users

- Operating System/Browser
  - Any OS that supports Edge, Firefox 23+, or Chrome
  - Popup block software disabled for the FAMCare® site
- 2 GB of RAM
- 1.5Mbps+ access to Internet
- Additional Software (optional)
  - Microsoft Word 2010 (or above)
  - Microsoft Excel 2010 (or above)
  - Microsoft Snapshot Viewer 9.0 (or above)
  - Foxit Reader or Adobe Reader

## Mobile Technology

FAMCare is compatible with the most commonly used mobile browsers available today, including those for Android and iOS devices. An excellent experience requires a reliable, high quality data connection, and we recommend that all available updates for your device's operating system and browser are installed to ensure you have the most current configuration available.

Provided your users already have FAMCare accounts and are familiar with the system, they only need to log in as usual and proceed to enter the necessary notes. We recommend limiting mobile entry to things such as:

- Demographics Updates
- Case Note entry
- Assessments
- Capturing client signature on required forms

The mobile system menu is smaller but still includes a face sheet, contacts and case notes. Entering case notes while waiting in court or elsewhere is possible and the case notes are entered immediately to the case record.

# Computer Configuration for Logging In

Site URL: Your site URL (Example, [www.gvtsecure.com](http://www.gvtsecure.com))

Note: You must set as a bookmark/favorite from the login in screen.

## Login Procedures and Business Rules

### Step One:

#### Login

- From the LOGIN page – enter your unique user ID and password.
- If at any time you forget your user ID and password – click the “**Forgot Password?**” link to retrieve your information. Your default password is typically 123456.
- When you log in for the first time – you will be prompted to change it.

#### Multifactor Authentication

- Please Note, the first time you login to the system, you will be prompted to enter a Multifactor Authentication Key.
- This key will be sent to the email address used when creating your user ID.
- Once the key has been entered, this will allow the browser and/or computer/mobile device currently being used to allow the user access to the system.
- If you switch internet browsers or accesses the system through another computer, you will be emailed a new key, which will then need to be entered again.

### Step Two:

#### Existing Session Detected

- If at any time you are attempting to log into the system and you see a red box that reads “**Existing Session Detected**” what it typically means is that you did not log off from the system during your last session – instead you just closed your browser.
- If you see the red box – simply just type in your password again – and you begin a new session.
- To log off out of the system – you must always click the **EXIT** button.

### Step Three:

#### Change Password

Upon logging in for the first time or after your password has been reset – the system will ask you to change your password. Type in a new password and then confirm it, as well.

**Passwords must start with an alphabetic character, have at least 2 numbers and be 6 digits long.**

## Step Four:

### User Profile Page

- Once you save your new password, you will proceed to a user profile information page.
- You will then set up a Security Question, and in the event, you ever need to retrieve your password and have the system email it to you.
- Choose a question from the list, enter your answer and save the record to complete your login

A screenshot of a web form titled "User Profile Information". It contains three input fields: "Email Address" with the value "test@user.com", "Security Question" with a dropdown menu showing "(Please select)", and "Security Answer" which is empty. A "Save" button is located at the bottom right of the form.

## Settings for Your Browser

### Edge

1. Open Edge Browser
2. Click the more button in the top right
3. Select Settings
4. Choose Privacy & Security in the left menu
5. Under Security, click the Block Pop-ups toggle to **Off**



### Firefox

1. Open Firefox Explorer.
2. At the top of the Firefox window, click on the Tools menu, and select Options....
3. Select the Content Panel.
4. In the Content panel:
  - a. Check the checkbox in front of "Block pop-up windows" to enable "pop-ups".
  - b. Exceptions: This is a list of sites that you want to allow to display pop-ups.
5. The Exceptions dialog has the following choices:
  - a. Allow: Click this to add a website to the exceptions list
  - b. Remove Site: Click this to remove a website from the exceptions list
  - c. Remove All Sites: Click this to remove all of the websites in the exceptions list

### Google Chrome

1. Click the Customize and control Google Chrome menu (the three dots in the upper right corner)
2. Select Settings.
3. Click Advanced at the bottom.
4. Under Privacy and security, click the Site Settings button.
5. Select Pop-ups and redirects.
6. To disable the pop-up blocker, uncheck the Blocked (recommended) box.
7. To enable pop-ups on specific sites, check Blocked (recommended) and click Add next to Allow and enter the URL(s).

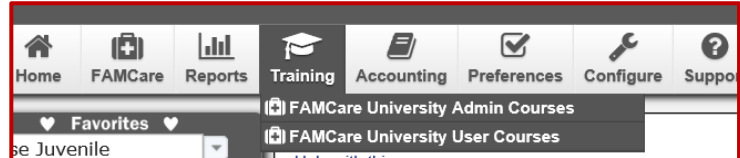
## Safari (for Mac Users)

1. Select “Safari” > “Preferences”
2. Click on “Security” at the top of the window
3. Check the box “Block pop-up windows” to enable this feature. Uncheck it to disable it

# FAMCare University

## Training Videos

The FAMCare system has basic training videos available to view while learning the system. These videos will help to guide you through issues and questions you may have.



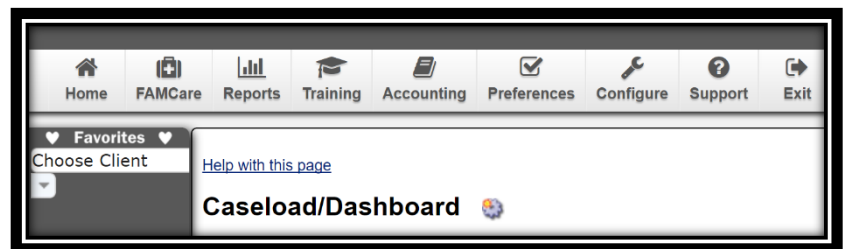
FAMCare University videos are provided to all users to augment training and to share quick refresher moments on how to do something within FAMCare. We highly encourage you to view or refer to these training videos while learning your new system. While some of your forms and menu items may be configured or customized differently during implementation, these videos still contain the same concept overview of the FAMCare system.

# Getting Started

## User Caseload/Dashboard Configuration

### Dashboard

This screen is set as the Home page by default for each user and can be accessed from other pages in the system by clicking FAMCare > Case Load (note that this will take you immediately to the Case Load screen and you will lose any unsaved changes on the form you leave).



Dashboard layout may be customized by each user by clicking the gear located near the top of your screen next to “Caseload / Dashboard.” For now, we are going to skip over the “Type of Caseload” options to explain the rest of the page, and then we will circle back around to this function.

The grid on the Master Case Board Layout screen represents the location of each dashboard element and may be adjusted by changing the numbers next to each item to the coordinating number on the grid. Case Alerts and Calendar items may be further customized by indicating the maximum number of each that the user would like to appear on their home screen. For example, if you select to view only appointments in the next 7 days you will not be able to see any scheduled beyond that until you choose the calendar on your home page.

Now let's take a closer look at the differences between the two types of Case Load screens. Near the top of the Master Case Board Layout screen there is a choice between "Traditional manually built" and "Based on my location (provider)" for Type of Caseload, and the default view that most users are familiar with is "Traditional."

| Traditional manually built                             | vs. | Based on my location (provider)                                                                  |
|--------------------------------------------------------|-----|--------------------------------------------------------------------------------------------------|
| Visible clients are those to whom the user is assigned |     | Clients are those with an open enrollment for the selected provider (location / department)      |
| <b>Case Alerts are specific to the user's caseload</b> |     | Case alerts selected by the user are shown for all clients enrolled with the selected provider   |
| <b>All calendar events are specific to the user</b>    |     | Provider calendar displays upcoming appointments for clients enrolled with the selected provider |

Although the Provider driven case load screen displays information for clients who may not be on your case load, you are still able to select which columns to display on the case load grid, the position of each dashboard element, and which Case Alerts to display.

## Themes

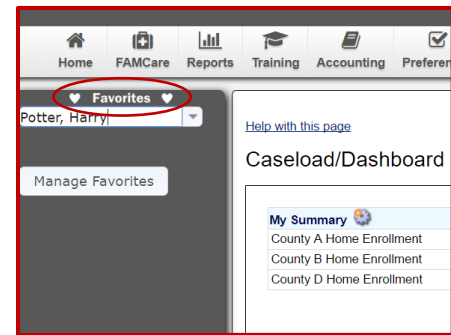
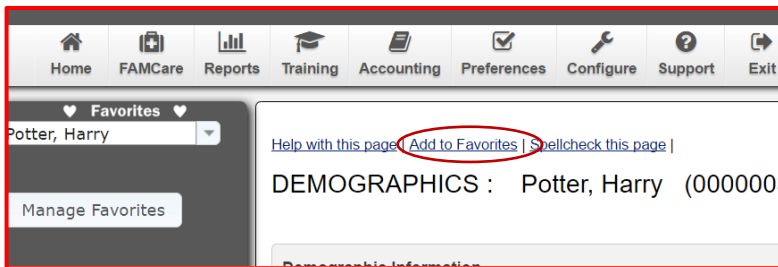
This option allows any individual user to set up their personal FAMCare view with a custom theme color, font and background texture.

- Choose one of the three themes, Modern, Nocturnal or Visions Server. Choose from one of the many font styles and sizes as well as colors and hues by scrolling side to side on the color bars.

You can view your selections at the bottom of the page. Once you are satisfied, Click the **Save** button to save your custom theme.

## Favorites

This option allows any individual user to see their recent client list as well as their most used or “favorite” forms such as the client demographic form, referral form, or case note - so they can easily navigate to these forms with one click. This option is set on the Home page by default for each user.

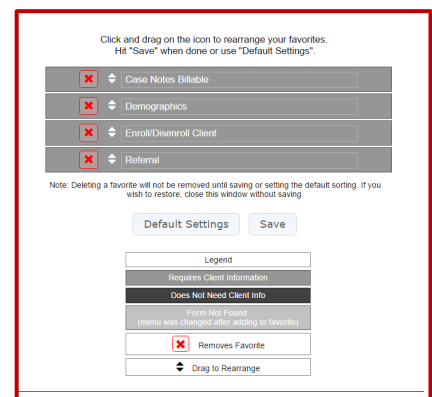


Favorites may be customized by navigating to the form you want to add to your Favorites menu. At the top of the form, click “Add to Favorites”, then click the Home button

to refresh and see the form located under your Favorites.

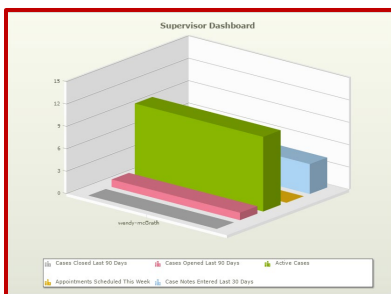
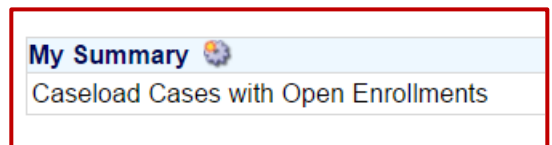
Once the forms have been added to the Favorites menu, users can organize their favorites by clicking “Manage Favorites”. You can drag the form name to arrange the order you wish to see them in, delete those you may no longer use, or rename forms to show in the Favorites List for easy navigation.

Click **Save** to save the order of your favorites form and they will appear on your Home page for ease of navigating to these forms.



## My Summary/Caseload Reports

“My Summary” is a sum of different counts throughout your system. These could include, gender, race, program enrollment, case closed or meals distributed to clients on a daily basis. These will have to be built by the development team. To load, click on the gear. Users will select those items on the left to be added to the numbers. When an item is selected, it will move to the right.



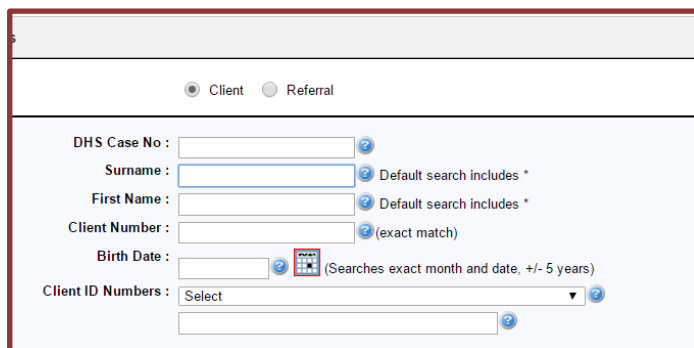
### Supervisors Dashboard

If you are in a supervisor role within your organization, there is a Supervisor Dashboard option. Please review this with your system administrator.

# Preference and Configure Functions

## Configure

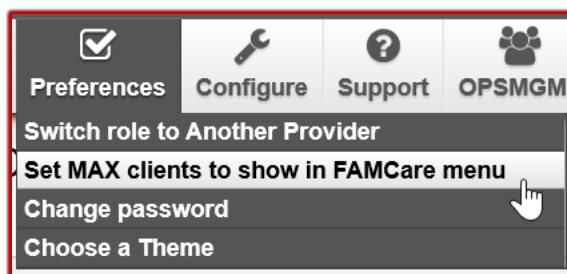
**Enabling Help Pane:** When the help pane is enabled, blue question marks are displayed on each field. If a user places their mouse on the field with a question mark, it displays information on what the field is used for or means. A help pane is displayed at the bottom of the page that displays text with similar information and instructions.



The screenshot shows a search form with the following fields and options:

- Client / Referral:** Radio buttons to select the search type.
- DHS Case No :** Text input field with a blue question mark icon.
- Surname :** Text input field with a blue question mark icon and a tooltip that says "Default search includes \*".
- First Name :** Text input field with a blue question mark icon and a tooltip that says "Default search includes \*".
- Client Number :** Text input field with a blue question mark icon and a tooltip that says "(exact match)".
- Birth Date :** Text input field with a blue question mark icon and a tooltip that says "(Searches exact month and date, +/- 5 years)".
- Client ID Numbers :** A dropdown menu with "Select" and a blue question mark icon.

## Set Max number of Clients on Menu



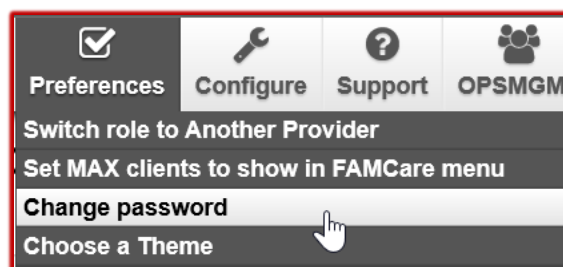
The default number of clients that are displayed in the FAMCare drop down is 10. If a user has a preference of how many clients to store on their FAMCare menu, this will allow them to select 5, 10, or 15 clients.

- This list does not show clients based on the user's case load. This list will show the last clients the user has accessed records for

## Change Password

Any user has the ability to change/update their password if they ever feel the need. The only business rules are:

- You cannot use the same password twice in the same year.
- All passwords must conform to standard password business rules, see security.



# Client Navigation and Entering Data

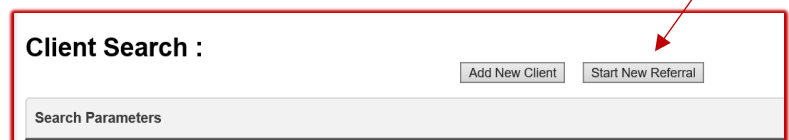
## Adding a Test Client

In order to navigate through your system – you will want to first add a test client. There are two ways a client may enter the system, based on the work flow of your organization. Users may enter the client information into the Demographics form, and begin the setup process from there. Another option is to enter the client as a referral, to allow the collection of needed information.

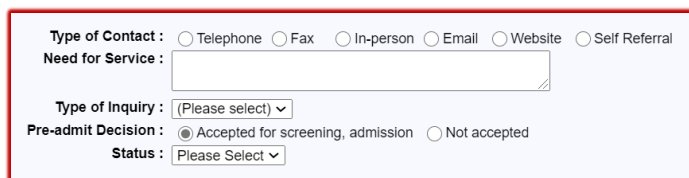
**\*\*When setting up test clients within the system, please ensure you set the last name as **Test**. This will allow the test clients to easily be identified, and deleted when needed\*\***

## Creating a new Referral:

- Go to the FAMCare button from the main navigational menu and choose “Client Select”.
- You will always want to ensure users search for the client they are entering, before moving forward with creating a new client.
- Once you have searched, and the client being entered is not showing as an option, select the option “Start New Referral” at the top of the client Search Screen.



- This will bring you to the base Referral Form, where you have the ability to capture the needed information to begin the process of intake for a client. This includes
  - Referral Agency and Person Referring information
  - Client Demographic Information
  - Decision Support Questions & Initial Review
- If the referral is to become an active client in the system, within the Initial Review section, mark the Pre-admit Decision as “Accepted for screening, admission” and click the “Save as Client” button

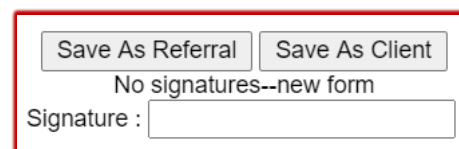


- This will save the referral and create the client record

- If users are not ready to create a client record, mark the Pre-admit Decision as

“Not accepted” and click “Save as Referral” button

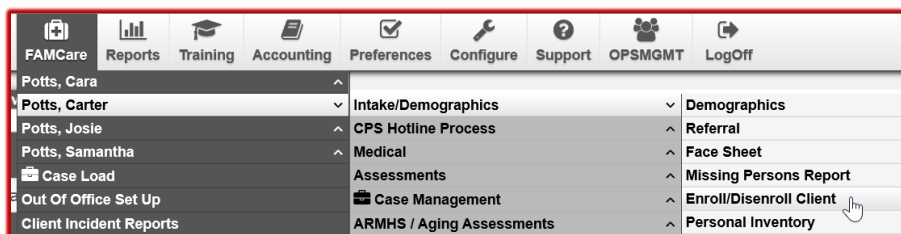
- Users will only be able to search for this client from the client search screen when the Referral radio button is selected



## Creating a New Client:

- Go to the FAMCare button from the main navigational menu and choose “Client Select”.
- Enter the client you wish to create and ensure the client is not already in the system.
- Once you have seen there are no existing clients in the system, click “Add New Client”
- The Demographic page will be displayed for the user to enter the new client information. All boxes highlighted in yellow must be completed. It is important to complete the whole form as fields from the Demographics page auto-populate on other forms in your FAMCare system.

## Client Enrollment



Once a client is entered into the system, they will need to be enrolled into a Provider and identify which service(s) they will be receiving. If you do not see

your client in the FAMCare drop down box you will have to go to FAMCare>Client Select and search for them.

To create a New Enrollment or Placement Record, select  Add

### Enrollment Information:

- First thing that you will see is “Date Entered” which is always the date that the record is added to the system. If the enrollment date is before today's, this will be indicated using the “Starting” date.
- Other information is available for selection, which may be customized for your organization needs

A screenshot of the 'Enrollment Information' form. It contains several input fields and dropdown menus. Fields include 'Date Entered' (04-25-2020), 'Starting' (empty), 'Hour at Entry' (empty), 'Condition at Intake' (Please select), 'Court Ordered' (checkbox), 'Court Date' (empty), 'Out of Home' (checkbox), 'Grade At Start' (Please Select), 'Set Pathway' (Please select), and 'Pathway Date' (04-25-2020). There are also instructions like 'Must include a start date' and a note: 'Please note: If a pathway is selected, it...'. The form is titled 'Enrollment Information'.

### Service Information:

A screenshot of the 'Service Information' form. It contains several dropdown menus. Fields include 'Type of Service' (Please select), 'Provider' (Please select from the Following List), 'Program Wing / Room' (Please Select Provider), 'Type of Placement' (Please select), and 'Program Worker' (Please select). The form is titled 'Service Information'.

The **Type of Service** drop down is a pre-populated list, specific to your organization

- **Provider** will tie into the Providers setup within your system. This may be a program they will participate in or a dormitory, which can then

be broken into wings

- A **Program Wing** will allow further tracking of a provider, if the need to capture a room or wing of a Provider is needed

- **Type of Placement** and **Program Worker** capture further details about the client enrollment

Once the “Type of Service” is selected and the “Provider” is set you will be able to save the form. A feature on this form is the option to enable the Signature Lock if needed, which will allow no further changes to be made to this form unless an override group is setup.

### Discharge Information:

This field is filled out at the time of discharge and can be left blank at this time. Once a date is entered, additional field options will show to collected data about the discharge.

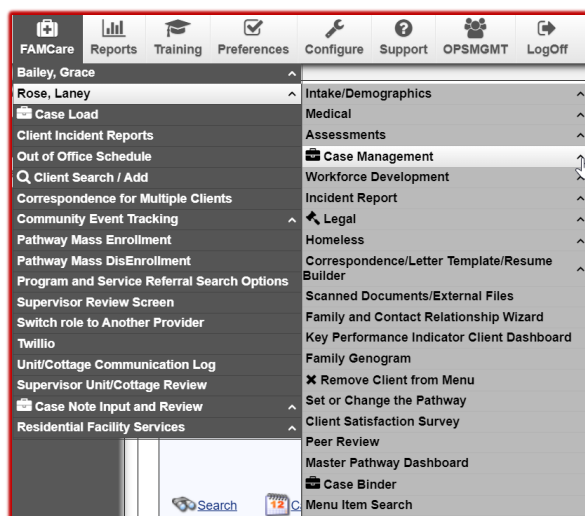
These fields may be customized to ensure the proper information is represented.

The screenshot shows the 'Discharge Information' form. It includes the following fields:
 

- Program End Date: 02/19/2020
- Hour at Discharge: (Please Select) dropdown
- Discharge Reason: (Please select) dropdown
- Open to future placements? Radio buttons for Yes and No
- Is Client Leaving the Agency? Radio buttons for Yes and No
- Living Situation at Discharge: (Please select) dropdown
- Discharged to Name: Text input field
- Address: Text input field
- City/State/Zip: Text input field with a dropdown for State
- Grade at End: (Please Select) dropdown

## Case Management

There are many forms within the FAMCare base system that can be used to collect client data. These forms are categorized on preset menus in the system, which may also be customized to fit your organization’s work flow. Some of the options of forms include clinical diagnosis, psychological evaluations, medical screening, school information, court information, incident reports, and employment information. Each of these forms are accessed through the FAMCare menu option, once a client is selected. Users will then navigate to the form needed to enter information.

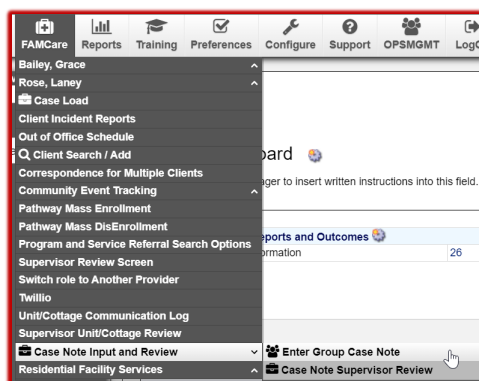


### Case Note

A case note may be created for multiple types of contacts and interactions with clients and their contacts, and may be used regardless of whether or not your organization currently uses the billing module. This is accessed through FAMCare>Client>Case Management>Case Notes.

- This form has several different features including:
  - The start and end of time of contact with the client.
  - Ability to track missed appointments.
  - Services provided: The Service dropdown is prepopulated based on services that are entered in the Master Service Set Up as fee for service.
  - Ability to track mileage.
  - Treatment Goals and other information.

## Group Case Note



This form can be used to start a case note for multiple clients whose note will share similar characteristics. For example, a Group Case Note may be created for a list of clients who attended the same session or were involved in the same event.

- Once the Group Case Note is saved, the user will see a new window with a list of each client for whom a note was created, and at that point the user has an opportunity to complete additional information specific to each client.
- These notes will be stored on the same summation as the other case notes for individual client records
- You can access the Group Case Note from the FAMCare menu.

## Family and Contact Relationship Wizard

Included in your FAMCare system is a Family Build feature that allows you to add client relationships, family members or client related contacts to a client record.

- The first step to create a relationship is to update the **Number in Household**, this will populate a template to complete client relationship Data
- The client will show as the first family member. This will drive the inverse relationships and also allow quick fill of information for those in the household.
- On each member, you will enter basic demographic information, indicate if they should be searchable as a client, if they are the legal guardian or head of household, and what

 A screenshot of two forms side-by-side. The left form is titled 'Demographic Information 2' and contains fields for: Clientnumber (000000741), Last/First/Middle (Potts / Josie), Birthdate, Race (Other), Gender (Female), Street, City/State/Zip, SSN, Searchable as Client? (Yes), Legal Guardian? (No), Head of Household? (No), and Relation to 1st Entry? (Adoptive Mother). The right form is titled 'Relationship information 2' and contains a field for Relationship to Potts, Cara (000000740) with a dropdown menu showing 'Adoptive Mother'.

their relationship is to the client.

- Users may also use the “Select Existing” hyperlink to bring in a client currently set up within the system
- You will notice, once the relationship is selected, it will also update the inverse relationship type for the client.
- Once completed, click “Save and Close” to save the family relationships.

These will also be updated and shown within the Demographics for “Client Relationship” section, along with the Contacts/Relationships form, users also have the ability to remove an existing family member by clicking the “Remove from Family” hyperlink.

# Calendar and Scheduling

The Dynamic Scheduler or Dynamic Calendar is a way for users to easily schedule appointments for their clients. Users have the opportunity to schedule events for themselves, and also for other users such as Clinicians and Therapist. If a user schedules an appointment for another user, that user will see the appointment when accessing the Calendar, along with receiving an email informing them of the appointment.



## Accessing the Calendar

The Calendar is accessed through the Calendar Icon on all forms within FAMCare.

- Once a user is within the Calendar they will have the ability to set the calendar by Day, Work Week, Weekly, or Monthly.
- Using the Search to Add People field, users can view calendars for other users or clients by adding them to the list.

A screenshot of a user interface element. It has a title 'Search Type' followed by three radio buttons: 'Provider', 'Client/User' (which is selected), and 'Client Group'. Below this is a label 'Search to Add People' followed by a text input field.

## Scheduling an Appointment

To schedule an appointment, the user double clicks on the day and time they would like to schedule the appointment, in the day, work week or week view. For the monthly view, users can click on any day to create a new appointment, however, will need to update the time of the event. After clicking the day for the appointment, the appointment screen will display and users can add the details to the appointment.

- Users will select an **Appointment Type** from within the drop down
- Select **Start** and **End** times for the appointment. This will then prompt for the **Duration** to auto populate
- Select the client's **Provider**, **Service**, and **Service Site**
- If users want to include other users or clients to the appointment, users can use the **Search to Add People** to the appointment.
- Another tool offered is the **Availability Wizard** scheduling option. This will allow users a quick look at all open times for those included in the appointment.
  - This may also be reviewed based on users in Security Groups

## Deleting Single Episode Appointments

To delete an appointment created within the Calendar:

- Open the Appointment to be deleted from the Calendar view
- At the bottom of the appointment screen, click the **Delete** button

- Please note, this option may not be available to all users in the system, based on the security groups set with delete access

## Recurring Appointments

There are two options for creating multiple appointments with the same employee or same employee/client combination:

- Add all clients/users you would like to schedule the appointment for by using the Search Add People field.
- Click the appropriate time slot to open a new appointment screen
- Confirm the starting date/starting time/ending time/duration of the initial appointment.
- Enter Appointment Type/Provider/Service if applicable
- Confirm Appointment Status is **Pending**
- Click **Repeat** hyperlink below the **Start Date** field
- Using the dropdown next to the word every, select the frequency of the appointment (day, week, month or year)
  - Note: Selecting day will allow you to specify days of the week for the appointment to reoccur
- In the text field after **until**, include the end date of the series.
- If there is a need to create multiple appointments, but the upcoming appointments are not on a set schedule, users will have the ability to schedule up to 5 appointments. Select the dates and times for the upcoming appointments
- Click Schedule/Update

Note: Specify up to 5 extra dates/times to duplicate this appointment. The appointments will not linked to each other. - OR -

|        |        |        |        |        |
|--------|--------|--------|--------|--------|
|        |        |        |        |        |
| 9:00am | 9:00am | 9:00am | 9:00am | 9:00am |

## Update Recurring Appointments

Once an appointment series is created, each appointment occurrence may be edited individually from the Calendar screen.

- Select the appointment in the series you would like to edit to open the appointment window
- Make the desired change (for example – start/end time, attendees, location, etc.)
- Click **Schedule/Update**

## Delete Recurring Appointments

- Select the appointment in the series you would like to delete to open the window

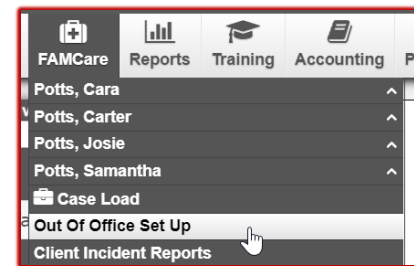
- At the bottom of the screen and click **Delete Appointment**
- You will receive an alert that states “Are you sure you want to delete this appointment?” Click **OK**
- You will receive another prompt to choose whether you are deleting the specific appointment or all **pending future items in the group** by clicking **OK** or **Cancel** to only delete this particular appointment.
- Please note, this option may not be available to all users in the system, based on the security groups set with delete access

## Additional Employee Scheduling Tools

### Out of Office Scheduling

This will allow users the ability to set time they will be away from the office, or unavailable to take new appointments. On this form, users will indicate the date(s) of their absence. Users will then select the reason for their absence.

Employees have the option to notify a supervisor of the absence, if this fits into the workflow of your organization.



Those dates entered will then be grayed out on the Calendar view for users wishing to view the availability for the user. Appointments may still be scheduled on those days marked unavailable, in case of an emergency. Visually, however, it will be shown that the user is out of office.

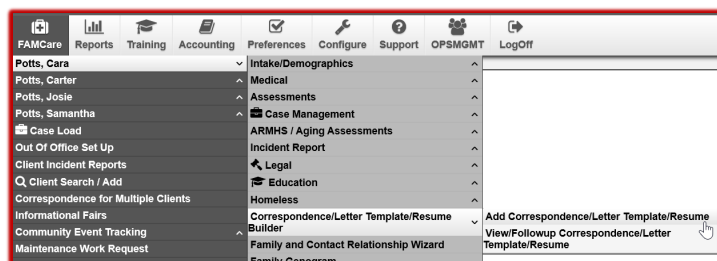
### Available Wizard

- Enter all Users who will need to be involved in the appointment.
- Click the link “Availability Scheduling Wizard”
- A new window will open, showing blocks of time. Those areas grayed out indicate that the user is not able to be scheduled.
  - Unavailable times are tracked based on Out of Office
- Click on the area in which you would like to schedule an appointment for all included, this will show a drop-down option with all times in that day to schedule the appointment.
- Select the correct time, and proceed
- Complete the remainder of the appointment information as needed, and save.

|                 | 5/7 | 5/8 | 5/9 | 5/10 |
|-----------------|-----|-----|-----|------|
| Leach, Sarah    |     |     |     |      |
| Mayfield, Inise |     |     |     |      |

# Letter Templates & Correspondence

This section will address the methods available to document correspondence with and on behalf of clients in FAMCare. Letter Templates perform a function similar to that of a Mail Merge by allowing the creation of a standard document with placeholders for information on your clients that may be found throughout your FAMCare system.



## Examples of Letter Templates Include

- Release forms
- Standard letters providing or requesting information
- Printed forms that are required to adhere to strict formatting specifications

Use of the Letter Templates in FAMCare requires that each local machine on which letters will be created and/or viewed have an installed copy of a PDF reader

## Create Correspondence for an Individual Client

- Navigate to the Correspondence/Letter Template/Resume Builder form within the Client Access menu for the client
- Click Add Correspondence/Letter Template/Resume
- Select the desired category
- Select the template within the chosen category
- The description field will be automatically populated with the title given to the letter during setup, but this may be changed
- Review the contents of the correspondence in the text editor field and make any necessary modifications prior to creating the letter
- Click Log this Correspondence and Generate PDF to store a record of the document in the client's file and produce a PDF suitable for printing

## Creating Correspondence without a Template

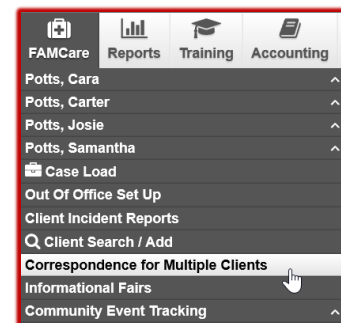
Anyone with access to the Generate New Correspondence menu item may manually create a one-time letter by entering the desired content into the text editor field. Once the letter is complete, you may click to Log this Correspondence and Generate PDF.

Please note that although the correspondence will be logged in connection with the client and may be followed-up on, this will not be stored as a template for future use.

## Create Correspondence Associated with Multiple Clients

Letters may be created using the one-time letter process described above, or you may choose a pre-existing Letter Template to enter a letter for multiple clients in at one time. Each client's personal information will be entered on his or her own document.

- From the FAMCare menu, click Correspondence for Multiple Clients
- To begin this correspondence, you will first search and select those clients you wish



### [Click to display filter options](#)

Type the lastname, and optionally a comma and first name to find a client

Search Name:

Current List: Click on name to remove

to create Letters for. This may be completed with a Manual Search, or you may click the link to display filter options.

○ This allows the option to enter clients by

Provider, Program, & Program Worker

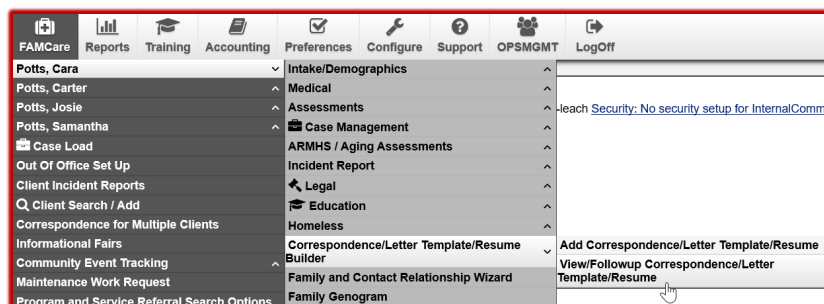
- Click on the client's name to select him/her to receive the letter. If a client is selected by mistake, click the client name within the list to remove
- Once the correct clients are selected, select a Category, Template Type, and then click to "Generate this Correspondence for ALL Selected Clients"
- A PDF will open to allow printing of the letters, if needed. There will also be a copy saved to each client's individual record.

Note: each client's record will include only their own letter on their log of correspondence

## Follow-up on Existing Correspondence

The View/Follow-up

Correspondence screen will display a history of letters sent to or on behalf of your client by various users in your organization. The summation displays the Letter Creation



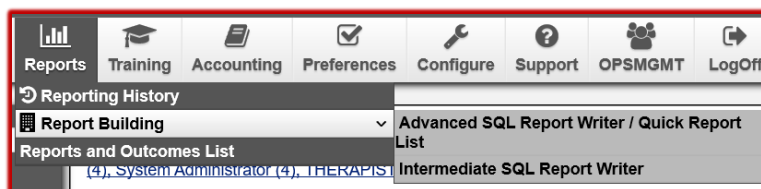
Date, name of Original Document, Follow-up Date (if one exists), the name of the Follow-up Document, and user who last edited this record.

- To view the Original Document, click its name from within the summation
- If a follow up document is required, select "Attach Scan" under the action line for the document in the summation. You can then browse your computer or network for the location of the scanned document, and click to "Save"

**\*\*Note:** Each Original Document may have only one Follow-up Document – uploading a new Follow-up Document will replace the old one.

## Reporting in FAMCare

There are several reporting features in FAMCare, including standard reports which have been created based on industry standards and Report Building options to allow Ad Hoc building of reports to capture information.



### Reports and Outcomes List

There are two types of reports, which come with the system and are set to pull in various data points collected from multiple forms.

- **SSRS Reports-** These reports may not be updated without back end access to the Database. Those with advanced SQL knowledge may reach out to their Project Managers to purchase a License, which will give them the needed access to update these reports.
- **Quick Reports-** These Reports may be created and updated through Report writing tools within the system as an option to Admins. Please Note: Users with light knowledge of SQL will have the ability to query all data within the system, which could compromise security permissions. Please ensure security is properly set with these options.

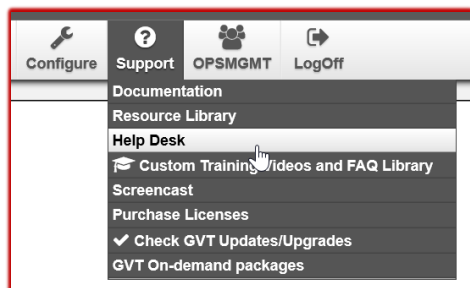
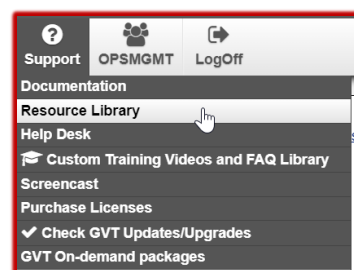
## FAMCare Support Options

### Resource Library

This allows users to view internal documents or videos created and used by your organization.

### Help Desk and support documentation

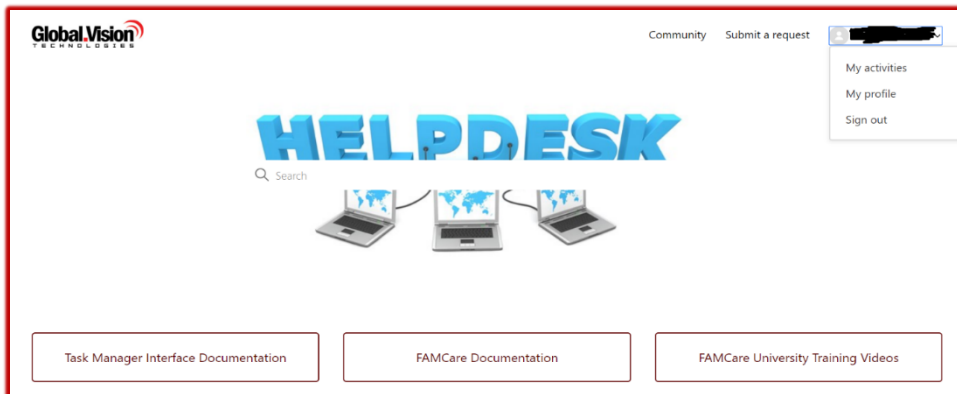
To access the helpdesk resource site while in FAMCare click on Support > Help Desk



Ensure that your pop-up blocker is set to accept pop ups for your system. If you are unsure on how to do this please contact your system administrator.

- After clicking the Help Desk link in your FAMCare system, you will automatically be forwarded to your Help Desk account.

- Your Help Desk home page has a variety of tabs to choose from, we will review each tab step by step.



Your **Help Desk Home Page** will have links to the knowledge base and forums, a search bar to search for answers and the latest announcement for your system. Articles in the knowledge base may

consist of step by step instructions, announcements, or links that you can click on to access videos, articles, and supporting documentation.

- Clicking the **Community** link allows users to search the community topics. A user can use the new post to add a topic to the community or search for previous topics.
- **FAMCare Documentation** shows articles located in the Knowledge Base as well as announcements. You can use the search box to find documentation on a specific topic. To read the article a user should click on the title to open the article.
- **Task Manager Interface Documentation** contains information about the Task Manager System.
- **Submit a request** allows a user to put in a support ticket on the Help Desk.
- **My activities** will allow a user to see any open support tickets. You are also able to upload screen shots, DOCS, PDF's or XLS files by clicking the attach file link. When all your information is complete click on the Submit button on the bottom of the page.

### Submit a request

Please select the appropriate Global Vision Technologies software product:

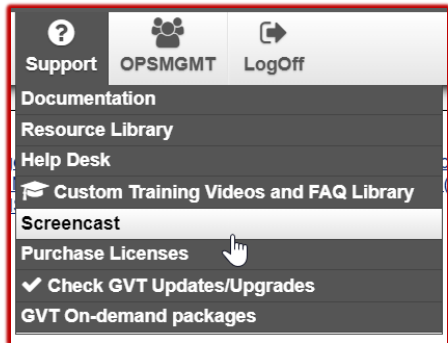
FAMCare

Subject

Description

Please enter the details of your request. \*WARNING: Do not type in last names, SSN or birthdates of clients. Instead reference by client number.

## Screencast Tool



If a user is experiencing an issue within the system, they may use this option to send a video for support. This will allow the Project Manager to easily identify and troubleshoot the reported issue. To use this tool, ensure pop-up blockers are disabled, as the tool will open into a new window.

- Click Record Screencast to launch the recorder. A frame will display letting the user know what will be shown while recording.
- Click “done” to complete the screencast.
- A new window will open to allow viewing of the screencast. Click Upload. Keep this screen open until you are prompted the recording has completed upload.

# Notes

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## Notes

[illegible]

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