

VSys One & Live

Paperless Office

"Let the dream come true!"

Agenda for Today

- Planning
 - *what do you need to do to get ready*
- Process
 - *how do you get there*
- Maintenance - Keeping Up!
 - *what does it take to maintain a paperless environment*
- Questions?

PLANNING

- **Who** do you need to consult with to make sure you know the policy in your organization?
 - Do some things “need” to remain on paper?
 - Are some things kept on file in other departments and do you need a copy or not?
 - *Sometimes just the certification and referral to the other department is enough.*
 - *We can provide integrations to OHM and other systems (ask us)!*
- **What** do you need to do to prepare the files?
- **Where** is your scanner, shredder, and paper now?
 - Do you need a long term plan for placement?
- **When** do you want to be “paperless”?
 - Work backwards from goal date, get organized!
- **Why** become paperless?
- **How** do I “get there”?

- **Who** do you need to consult with to make sure you know the policy in your organization?
 - Do some things “need” to remain on paper?
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 - *Sometimes just the certification and referral to the other department is enough.*
 - *We can provide integrations to OHM and other systems (ask us)!*

If you don't know, ask someone.

- **What** do you need to do to prepare the files?
- **Where** is your scanner, shredder, and paper now?
 - Do you need a long term plan for placement?
- **When** do you want to be “paperless”?
 - Work backwards from goal date, get organized!

Preparation is key to successful transition!

- **Why** become paperless?
- **How** do I “get there”?

Create your “benefit statement” & get started!

PROCESS

VSys One – where are the files located in the volunteer record?

- Attachments (electronic files)
- File Types – Naming Conventions
- Uploading Files and putting them in the “right folders” (details in upload – expiration?)
- Certifications and other things that expire
- How to get them out when you need them – surveyors (healthcare)

VSys Live – volunteers uploading files to their profile!

- Volunteer login and your options for what/how volunteers upload files
- Volunteer “inbox” and notifications of delivery (move files to right folder or if you allow only certain files and want separate upload queues in VSys Live you can do that as well.
- Volunteers can ACCESS files from their profile – this is why it is important to have “file folders” in the attachments – so you can make any of those “categories” (file folders) visible so volunteers can self serve.

VSys One – where are the files located in the volunteer record?

- Attachments (electronic files)
- File Types – Naming Conventions
- Uploading Files and putting them in the “right folders” (details in upload – expiration?)

Take a look at virtual file organization technique.

Setup your “virtual file folders” “ATTACHMENT TYPES”

In VSys One
Search “Tools” for:
Attachment Type (setup)
Create your “file folders”
See Sample – Create “folders” that make
sense to you!

*Use the process to organize and define what makes
sense for your unique organization.*

Description	Status
Inbox from Volunteer	Active
Background Checks	Active
Certifications	Active
Comments (see note)	Active
Custom Computer Agreement	Active
Custom Medical	Active
Internship Info	Active
Interviews (checklist forms)	Active
Mandate Info	Active
Skills (talents awards achievements)	Active
Training Evals Surveys	Active
Document	Active
General	Active
Legal Problems Issues	Active
Photos	Active
SCANNED EXPIRED Historical Info	Active

Attachments Within a Volunteer Profile “TYPE”

When adding a file to a volunteer profile, you can CHOOSE the “type” (the virtual file folder) you would like the item to appear under in the “virtual file cabinet” within the volunteer’s profile.

These are easily changed to other folders, if you wish to move them.

Document and General are defaults and cannot be made inactive. Your choice to use them or create your own!

Attached file

Description:
Scarlett Grace in Shades.jpg

Type:
Photos

Status:
(n/a)

Documents\Scarlett Grace in Shades.jpg

VSys

Attachments Dialog Box Let's Discuss Options!

Type: Basically, a "virtual file folder"
 Status: Approved, New, Pending, Rejected
 Effective Date: Default Date Loaded
Expiration Date: Can be used, as needed*
 Comments: Can be used, as needed
 Note options: Save, Email, Open, Send

**WARNING: Does NOT Replace
 Certifications or Fill for You!**

Attached file

Description:
 iChat or Fingerprint 2017 Karr-Zlotnicki, Jacquie.docx

Type: Background Checks Status: (n/a) Effective date: 06/22/2017 Expiration date:

Comments:
 Fingerprint Report - clear and complete

Original filename: "iChat or Fingerprint 2017 Karr-Zlotnicki, Jacquie.docx"

[Save to a file](#) [Launch/open](#)
[Email this file](#) [Email this file directly from VSys](#)

Close

Naming Conventions for Files in Virtual Folders

Attached files for Karr-Zlotnicki, Jacquie/Karr-Zlotnicki, Jacquie/Person lookup/VSys One (Sandb)

VSys One > Person lookup > **Karr-Zlotnicki, Jacquie** > Attached files for Karr-Zlotnicki, Jacquie

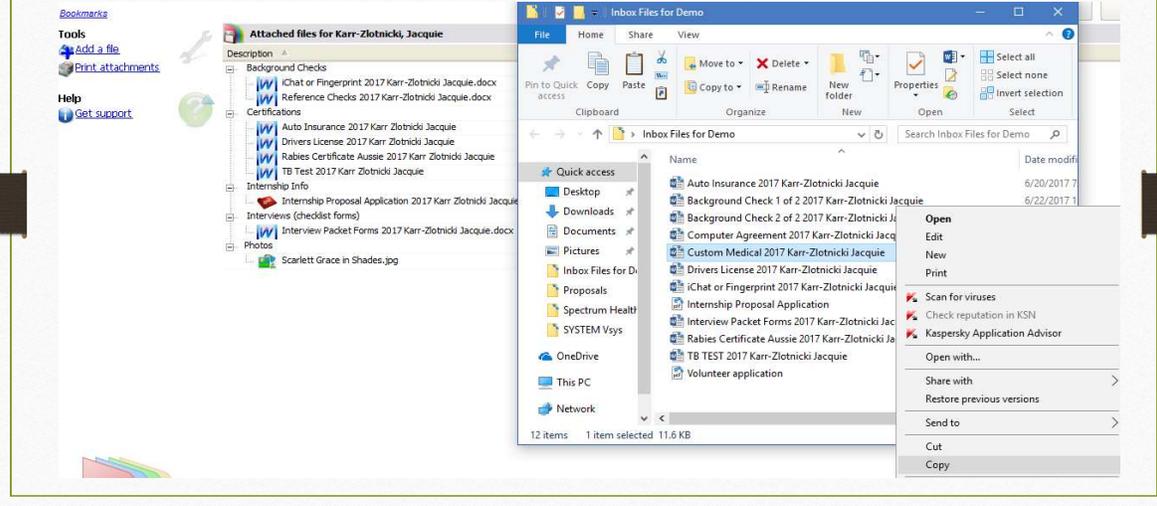
[Bookmarks](#)

Tools
[Add a file](#)
[Print attachments](#)

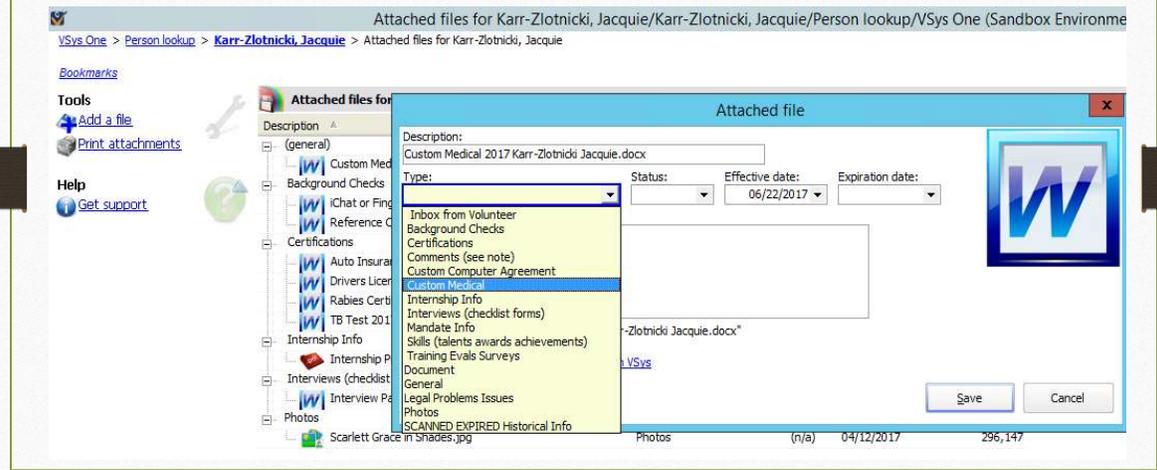
Help
[Get support](#)

Description	Type	Status	Effective	Expiration	Size
Background Checks					
iChat or Fingerprint 2017 Karr-Zlotnicki, Jacquie.docx	Background Checks	(n/a)	06/22/2017		11,894
Reference Checks 2017 Karr-Zlotnicki, Jacquie.docx	Background Checks	(n/a)	06/22/2017		11,898
Certifications					
Auto Insurance 2017 Karr-Zlotnicki, Jacquie	Certifications	(n/a)	06/21/2017		11,885
Drivers License 2017 Karr-Zlotnicki, Jacquie	Certifications	(n/a)	06/21/2017		11,889
Rabies Certificate Aussie 2017 Karr-Zlotnicki, Jacquie	Certifications	(n/a)	06/21/2017		11,900
TB Test 2017 Karr-Zlotnicki, Jacquie	Certifications	(n/a)	06/21/2017		11,847
Custom Medical					
Custom Medical 2017 Karr-Zlotnicki, Jacquie.docx	Custom Medical	(n/a)	06/22/2017		11,895
Internship Info					
Internship Proposal Application 2017 Karr-Zlotnicki, Jacquie	Internship Info	(n/a)	06/21/2017		151,113
Interviews (checklist forms)					
Interview Packet Forms 2017 Karr-Zlotnicki, Jacquie.docx	Interviews (checklist forms)	(n/a)	06/22/2017		11,911
Photos					
Scarlett Grace in Shades.jpg	Photos	(n/a)	04/12/2017		296,147

Step One – Copy file from your computer (or from within an email)



Step Two – Paste into volunteer attachments and choose “type” – tweak file name (if necessary)

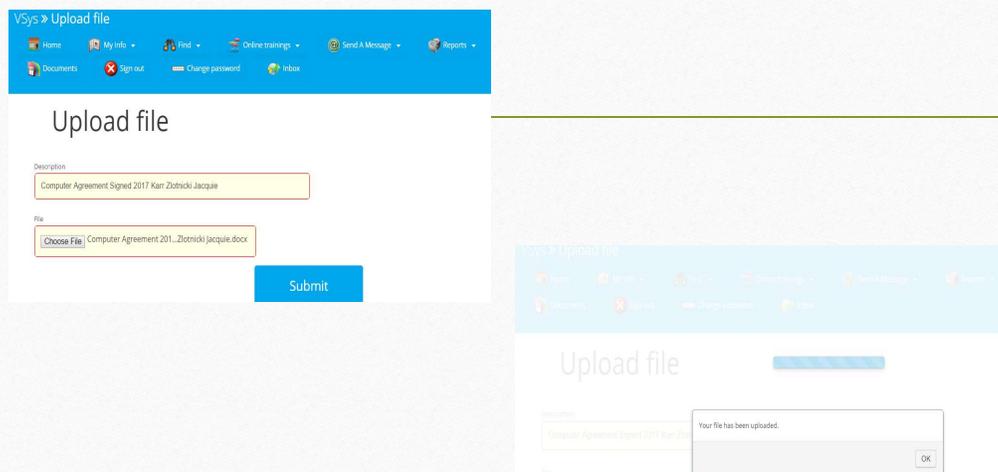


VSys Live – volunteers uploading files to their profile!

- Volunteer login and your options for what/how volunteers upload files
- Volunteer “inbox” and notifications of delivery (move files to right folder or if you allow only certain files and want separate upload queues in VSys Live you can do that as well.
- Volunteers can ACCESS files from their profile – this is why it is important to have “file folders” in the attachments – so you can make any of those “categories” (file folders) visible so volunteers can self serve.

VSys Live provides volunteer “self-service” to files!

VSys Live Volunteer Portal – Upload File



The image displays two screenshots of the VSys Live Volunteer Portal's 'Upload file' interface. The left screenshot shows the form with the following fields and elements:

- Navigation:** Home, My Info, Find, Online trainings, Send A Message, Reports, Documents, Sign out, Change password, Inbox.
- Title:** Upload file
- Description:** Computer Agreement Signed 2017 Karr Zlotnicki Jacque
- File:** Choose File Computer Agreement 201...Zlotnicki Jacque.docx
- Action:** Submit

The right screenshot shows the same interface after a successful upload, with a message box stating: "Your file has been uploaded." and an OK button.

Volunteer upload from VSys LIVE instantly delivered to their profile in designated folder!
YOU can choose to receive Notifications!
Creating a single “virtual file folder” for an inbox is a nice way to be notified you have new information from a volunteer to “handle”!

Attached files for Karr-Zlotnicki, Jacquie/Karr-Zlotnicki, .

VSys One > Person lookup > **Karr-Zlotnicki, Jacquie** > Attached files for Karr-Zlotnicki, Jacquie

[Bookmarks](#)

Tools

[Add a file](#)

[Print attachments](#)

Help

[Get support](#)

Attached files for Karr-Zlotnicki, Jacquie

Description	Type
Inbox from Volunteer	Inbox from Volunteer
Computer Agreement Signed 2017 Karr Zlotnicki Jacquie	Inbox from Volunteer
Background Checks	Background Checks
iChat or Fingerprint 2017 Karr-Zlotnicki Jacquie.docx	Background Checks
Reference Checks 2017 Karr-Zlotnicki Jacquie.docx	Background Checks
Certifications	Certifications
Auto Insurance 2017 Karr Zlotnicki Jacquie	Certifications
Drivers License 2017 Karr Zlotnicki Jacquie	Certifications
Rabies Certificate Aussie 2017 Karr Zlotnicki Jacquie	Certifications
TB Test 2017 Karr Zlotnicki Jacquie	Certifications
Custom Medical	Custom Medical
Custom Medical 2017 Karr-Zlotnicki Jacquie.docx	Custom Medical
Internship Info	

Volunteers can access files from their profile, if you wish to set that up.

**This is why the “virtual file folders” are so important,
because you control which folders they have access to in VSys Live!**

Secure | <https://jkztest.vsyslive.com/pages/MYINFO>

Attached files

Type	Date	Status	Download
Inbox from Volunteer	06/22/2017 11:37AM	(n/a)	Inbox from Volunteer
Background Checks	06/22/2017	(n/a)	Background Checks
Background Checks	06/22/2017	(n/a)	Background Checks
Certifications	06/21/2017	(n/a)	Certifications
Certifications	06/21/2017	(n/a)	Certifications
Certifications	06/21/2017	(n/a)	Certifications
Custom Medical	06/22/2017	(n/a)	Custom Medical
Internship Info	06/21/2017	(n/a)	Internship Info
Interviews (checklist forms)	06/22/2017	(n/a)	Interviews (checklist forms)
Photos	04/12/2017	(n/a)	Photos

- Certifications and other things that expire
- How to get them out when you need them – surveyors (healthcare)

CAUTION – Understanding upload file feature!

Certifications and other things that expire

Additional data Date created: 09/20/2016 Last changed: 06/22/2017

Include an alternate name

Include a phonetic name

Job preferences: Contact flags: Skills:

Photo ID verified: Person number: Primary language: Communication: Additional:

[Attachments \(11\)](#)

Special requests/needs, Exclusions [Add an address](#)

Addresses: 2 [Add background check](#)

Alerts: none [Add certification](#)

Application form: 1

Assignments: 2 plus 1 not shown

Background checks: 6

Certifications: 12

Type	Effective	Expiration	Status	Result	Other
Auto insurance	06/20/2017	12/20/2017			Comments: Ford Mustang 2015 - BlueLicense Tag 123 XYZ, Date created: 6/20/2017 6:00:48 PM, Expiration date: 12/20/2017
Code of Conduct	01/01/2017		01/01/2017		
Driver's license	06/20/2017	09/27/2019			
Flu vaccine	11/01/2016		11/01/2016	On site at Freedom Manor	
HIPAA Confidentiality Statement	06/20/2017	06/20/2018	06/20/2017		
Nurse RN	06/12/2017	06/05/2020			
Pet records	06/20/2017	06/20/2018			
PHI Data Storage	06/20/2017		06/20/2017		
Rabies	06/20/2017	06/20/2019			Animal: Aussie - Dog, Comments: Border Collie & Australian Shep Mix DOB 8/8/08, Date created: 6/20/2017 6:00:48 PM, Expiration date: 06/20/2019
TB test	06/12/2017	06/12/2018		Clear	
TB test	04/12/2017	04/30/2018		Clear	
Volunteer Agreement - Hospice	06/20/2017		06/20/2017		

How do I access files in overall system?

The screenshot shows the 'Advanced find people/VSys One (People) (Sandbox)' interface. On the left, there is a 'Criteria' section with dropdown menus for 'Groups' (set to 'File - Hospice'), 'People types' (set to '(no filter)'), and 'Exclude people with these flags' (set to 'Archived,Banned,Deceased,Placeholder,Status: Applica'). A 'Help' dropdown is also visible. The main area contains a search bar with filters for 'Matc...', 'N...', 'E-mail...', 'Gender', 'Perso...', 'All gro...', 'DOB', and 'Comp...'. An 'Attached files' dialog box is open in the foreground, featuring dropdown menus for 'Types' and 'Statuses' (both set to '(no filter)'), and date pickers for 'Effective', 'Expiring', and 'Last changed'. 'Save' and 'Cancel' buttons are at the bottom of the dialog.

How do I print files in overall system?

The screenshot shows the 'Attached files report/VSys One (Sandbox Environment)' interface. The title bar includes 'VSys One > Attached files report' and 'Bespoke Software, Inc.' with a 'Back' button. The main content area is titled 'Attached files report' and includes a table with columns for 'Attachment types', 'Statuses', 'Effective between', 'Expiring between', and 'Last changed'. The 'Attachment types' dropdown is set to 'Membership Info'. Below the table, there is an 'Add' button and a 'Help' section with 'Active status' (Active, Leave of absence) and 'Delete' and 'Edit' icons. On the left, there are 'Tools' (Load settings, Save settings, Properties, Clear settings) and 'Output options' (Print to: Microsoft Print to PDF (redirected 11)).

MAINTENANCE – KEEPING UP!

- **Straggler pieces of paper** – you will have them, just deal with them.
 - Review your methodology occasionally to make sure your file types (“folders”) are set up in a way that is meaningful and easy for you to navigate
 - Review your file naming convention to make sure they are organized in a way that makes sense
- **OVER TIME** – keeping things orderly will make accessing files more efficient for all users

QUESTIONS?

- *Comments?*
- *Concerns?*
- *Ideas?*

Thank you for joining us!