Senior Living Communities, LLC

Regroup – Mass Communication

Emergency Contacts Integration with Vision

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How to Enable a Contact as an Emergency Contact

We have integrated our Mass Communication Tool (Regroup) with our Billing and EHR software (Vision). This integration allows a daily sync of data from Vision to Regroup to include Resident demographics (Name, Emails, Home/Mobile Phone Numbers, and Address) as well as the email and phone numbers of Responsible and/or Related Party Types recorded as the type of "Emergency Contacts".

Here are the steps necessary to make sure Emergency Contacts are available in Regroup.

1) In Vision, Navigate to Census > Resident Info
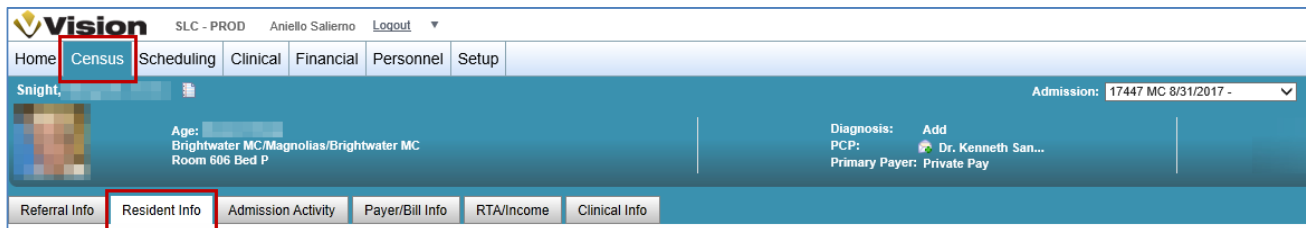
If the Contact that is to be notified in emergencies is already added as a contact (i.e. Financially Responsible, POA, Daughter, etc.), they simply need to be added as the Type "Emergency Contact".

2) Click on the Name of the Contact already added.
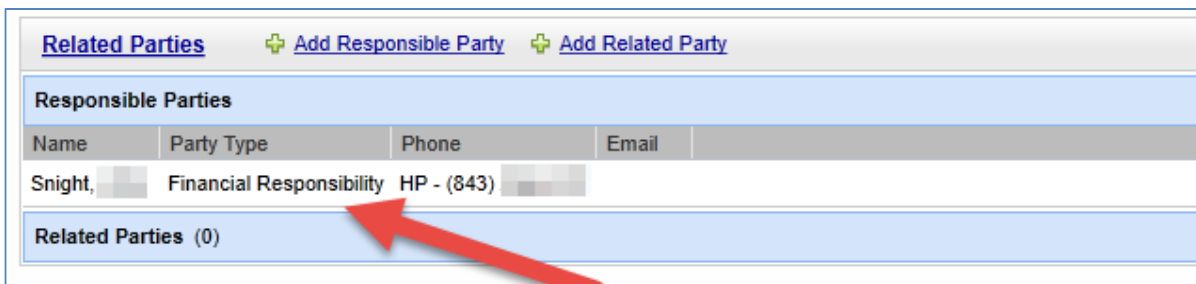
3) In the "Party Type" box, scroll until you find "Emergency Contact". Now press and hold the CTRL button your keyboard. While you hold the CTRL button down, use your mouse to click on "Emergency Contact" so it is highlighted blue. Holding the CTRL button is critical if you are selecting more than one Type (i.e. Financially Responsible and Emergency Contact).
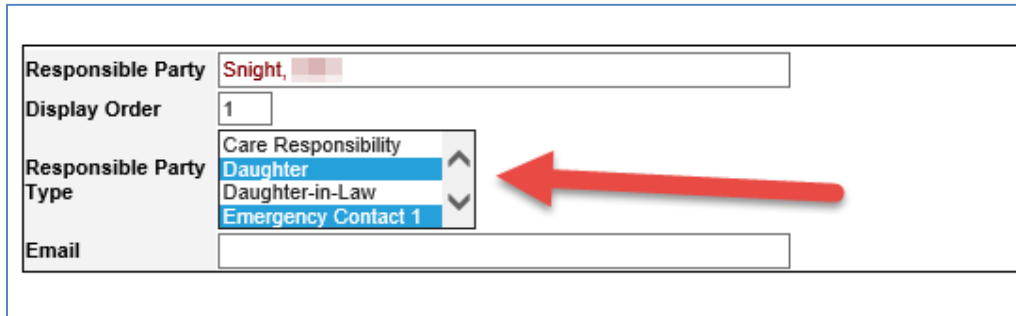

4) Press the **Submit** button at the bottom left of this screen to save the changes.

NOTE: You can select and/or use any of the Type that include "Emergency Contact". For example, you can use "Emergency Contact" of the Related Party Type of "Emergency Contact 1", "Emergency Contact 2", or "Emergency Contact 3" of the Responsible Party Type. They will all work for this case.

Useful Tip in Managing Contact Data

To determine the status of the contact information contained within Vision, use these two reports:
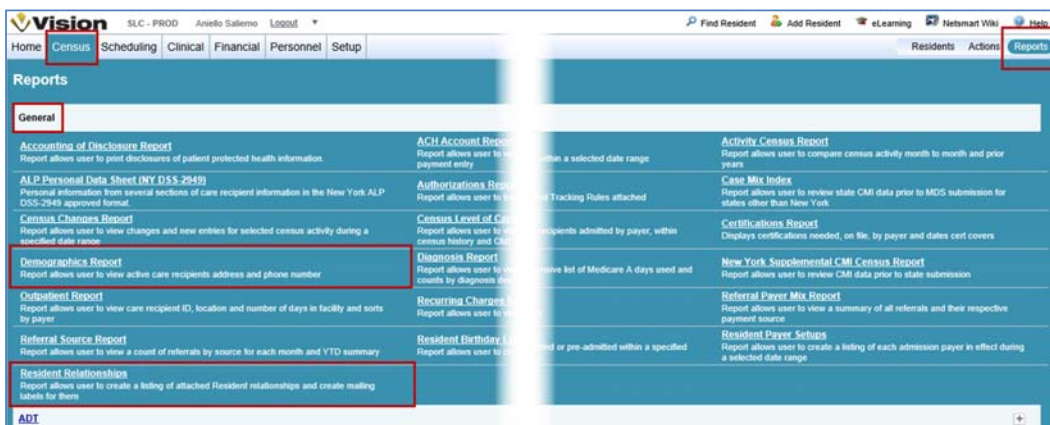
1) **Demographics Report**
   This report will provide you the contact data of each Resident.

   a. Navigate to Census > Reports > General > Demographics Report

   b. Filter the "Organization Selection" as needed. I suggest the entire community for this purpose.

   c. Make sure you only have the "Resident Selection" checked to Active.

   d. In "Fields To Include", select all as we should capture all for residents.

   e. Press Submit in the upper left corner to run the report.

2) **Resident Relationships**
   This report will provide you the contact data of each Residents associated contact (i.e. Emergency Contact and such).

   a. Navigate to Census > Reports > General > Resident Relationships

   b. Filter the "Organization Selection" as needed. I suggest the entire community for this purpose.

   c. Make sure you only have the "Resident Selection" checked to Active.

   d. In "Relationships to Include", select all.

   e. In the "Related Party Type" and "Responsible Party Type", select all of the types that include "Emergency Contact", "Emergency Contact 1", "Emergency Contact 2", "Emergency Contact 3".

   f. Press Submit in the upper left corner to run the report.