

## **Version 4 Conversion Checklist**

- Review the wait list reports to ensure that all referrals that resulted in an enrollment have been properly marked as 'inactive'. The conversion can't match the enrollment record to the referral properly if the referral is still open after the enrollment date.
- Review the 'program' pull down in the employee records. This is used to create a default position for each staff member, and is also used to determine the program to associate with each note in v4.

**Please note: Pirouette v4 requires SQL Server 2005**

## Version 4 Upgrade Details

### *What the conversion does:*

- The allergies box on the client basic information page has been removed. Any data in the allergies section is automatically moved to the 'alerts' field.
- The emergency contact checkbox and contact role type fields are moved from the contact record to the contact role page.
- Crisis prevention plans are converted to the new user-defined format. By default the crisis plan format is identical to version 3, but new fields can be added to the template.
- Incident reports are converted to the new format. The incident report is automatically assigned to the first client selected in the list. All other clients are listed in the 'who was involved' field.
- Legal history records are converted to the new format. One status entry is made for the start of the legal history record. As no status history was previously kept, that entry will reflect the current status.
- Referrals and enrollments are merged into intake records. Referrals are automatically matched to enrollments by searching for an enrollment that happened to the same program in the 180 days following closing the referral.
- CTO information is transferred from the referral to a CTO history item.
- The call and visit checkboxes on case notes are converted to call and visit contact types.
- As version 4 tracks the program associated with each note, the conversion matches each note to a program based on the program specified in the employee record of the person who wrote the note.
- Crisis calls and visits are converted to notes. The contact type is 'crisis call' or 'crisis visit', and the crisis data is transferred to the 'related assessments' section.
- Group sessions are converted to group notes. Attendance records are automatically transferred.
- Current employee position is converted to an employee position record.
- First contact date is initialized for all notes based on the earliest entry made.