



Procura Mobile User Guide

Purpose

The purpose of this document is to describe a process to navigate within Procura Mobile Application.

Groups Applicable to

Direct Service Staff (Health Care Aides, Home Support Workers, Rehabilitation Assistants, Integrated Support Workers)

1. Log into Procura Mobile

Step 1. On the Home Screen of your phone, select the Procura icon.



Figure 1 Procura Icon

Step 2. Select Login with SSO (Single Sign On)

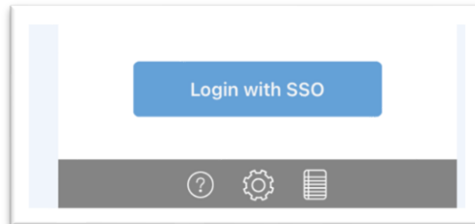


Figure 2 Single Sign on Icon

2. Schedule View

Step 1. After logging in, your schedule will display today's appointments. You can only access appointments for today and will also be able to view appointments for the next day. The schedule will give you a mix of timed visits and/or timeless visits

Each scheduled appointment includes the following information:

- Client name
- Address
- Start and end time of appointment
- Status

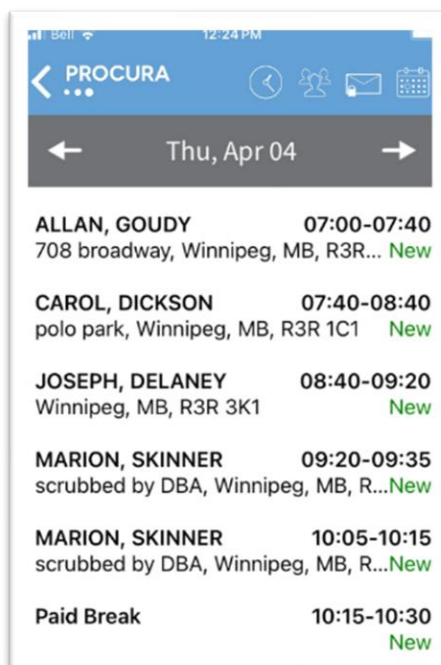


Figure 3 Schedule

Step 2. There are different status types relevant to the client or visit. Held visits do not appear in Procura Mobile (e.g., hospital stays, family request, etc.)

Status	Description
<i>New</i>	The client is new to you.
<i>Normal</i>	The client is known to you with no new updates.
<i>Updated</i>	Updates have been made to the client record.
<i>Cancelled</i>	The visit has been cancelled by the back office
<i>Open</i>	The visit has been started.
<i>Completed</i>	The visit has been started and completed.
<i>Start Due</i>	The visit has not been started.
<i>Verified</i>	The visit has been processed by a timekeeper

Step 3. Select the Right Arrow to view tomorrow's appointments

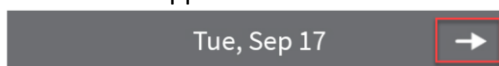


Figure 4 Right Navigation Arrow

Step 4. Select the Left Arrow to return to return to today's appointments.

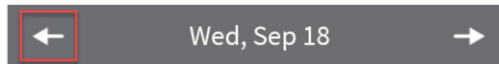


Figure 5 Left Navigation Arrow

Step 5. To view an extended list of clients scheduled, go to Schedules in the Procura Portal.

<https://ehcr-employeeportal-wrha.sharedhealthmb.ca/>

3. Appointment Details

Step 1. From today's appointments view (*refer to schedule view*), select the client appointment.

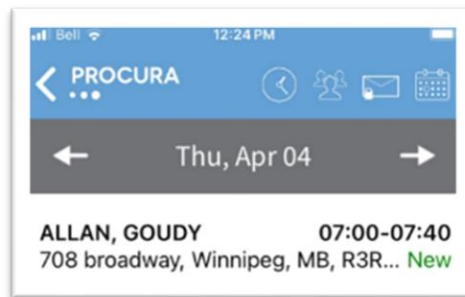


Figure 6 Appointment View

Step 2. A new screen appears showing Appointment Details, Car Plan Information, etc.

- a. The Appointment Details ribbon displays the visit date, time, duration, address, phone number and status.
- b. The Care Plan Information ribbon serves 2 different purposes:
- c. Displays the care plan tasks required for the visit
 - i. Warns if there are Risks on file
 - ii. Check the Hazards section on the Client Details page
- d. The Appointment Information ribbon displays the Shift code which is used to identify the type of visit for scheduling purposes, and the Pattern (onetime or regular)
- e. The Order Information ribbon displays the Funder and the date the funding authorization began



Figure 7 Appointment Details

4. Client Details

The Client Details view gives you information about the client that is not in the Appointment Details view.

Step 1. From the Appointment Details screen, tap on the Client Detail icon in the Grey Bar.

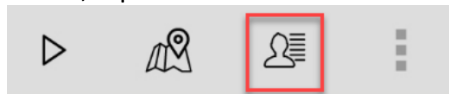


Figure 8 Client Details Icon

Step 2. The Client Details screen will appear, showing client information, contacts, addresses, allergies, equipment and hazards

- The first two sections contain basic information repeated from the Appointment Details page.
- Informal Contacts and Addresses are contacts that are non professionals (friends, family, etc.) and Client addresses.
- Equipment- any equipment in the home/Languages/Likes/Dislikes
- Hazards refer to risks and will refer to the existence of a Safe Visit Plan.

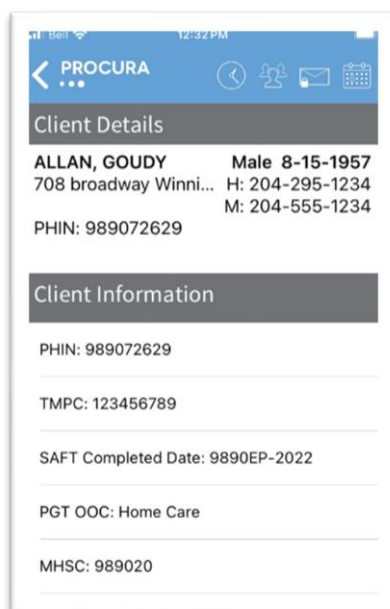


Figure 9 Client Details

5. Travel Directions

Step 1. The Apple Maps icon appears on the Appointment Details screen and the Client Details screen.

Step 2. From the Appointment Details or Client Details screen, select the Maps icon.

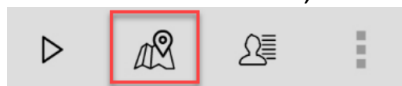


Figure 10 Map Icon

Step 3. Apple Maps will open with the client address marked with a red location icon. Select Go to receive turn-by-turn directions.

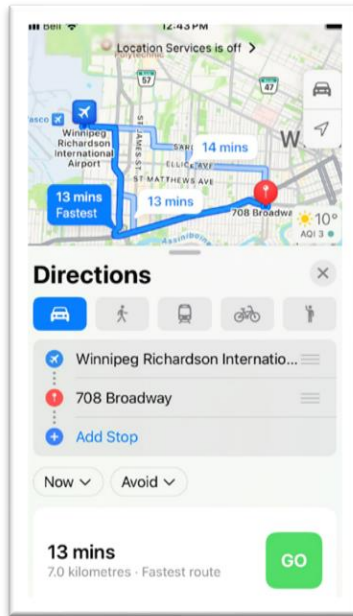


Figure 11 Apple Maps

Step 4. Once completed or to end the route, select the down arrow  and select End Route.

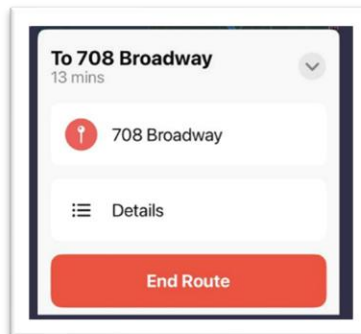


Figure 12 End Route

Step 5. To exit Apple Maps, select Procura on the top left-hand corner to proceed back to Procura



Figure 13 Exit Procura Mobile

6. Start and Stopping a Visit/Attendance Type

Step 1. The Start Visit icon will appear from the Appointment Details screen. Select on the client you would like to start the visit. All visits must be started and stopped. Scheduled (paid/unpaid) breaks and admin time will also show up in your schedule and require to be start/stopped.

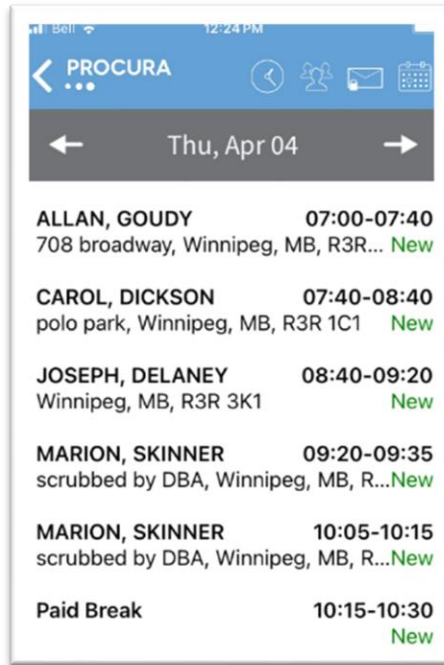


Figure 14 Client Visit

Step 2. From the Appointment Detail screen, select the Start Visit.

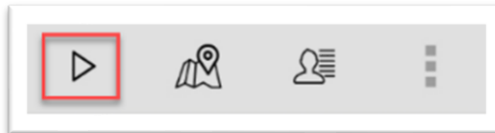


Figure 15 Start Visit Icon

Step 3. Select Start.

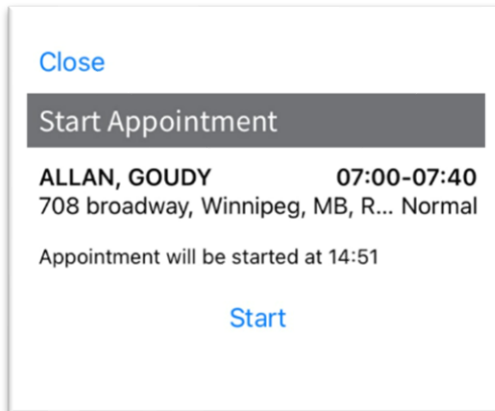


Figure 16 Starting a Visit

7. Calling a Client

Step 1. Calling a client is available within the Appointment Details and Cleint Detials screen screen. Select the ellipses (three dots) to bring up the calling feature.



Figure 17 Ellipses

Step 2. Select “Call Client” to make a phone call.

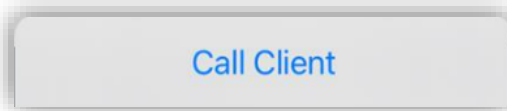


Figure 18 Call Client Feature

Step 3. You will be prompted to select the phone number you wish to call.

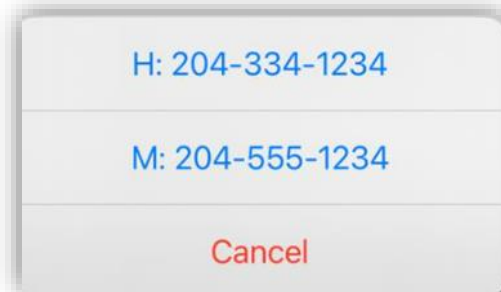


Figure 19 Phone Number Selection

1. Calling a Informal Contact

Step 1. Calling a client’s informal conacts is available within the Cleint Detials screen screen. Select the contact name you wish to call.

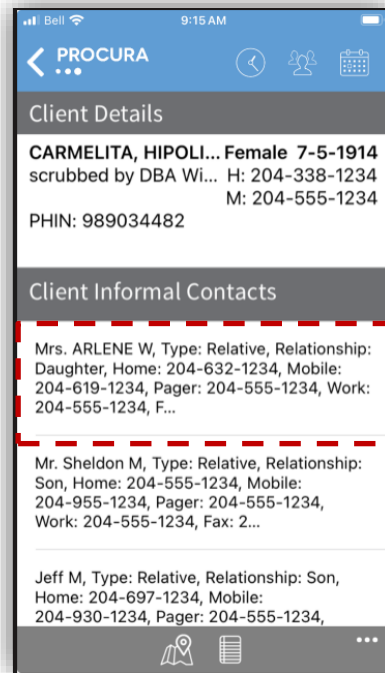


Figure 20 Contact List

Step 2. Select the phone number from the list. To ensure the correct number is selected, click directly on the number. Avoid clicking on the name or the line associated with the number.

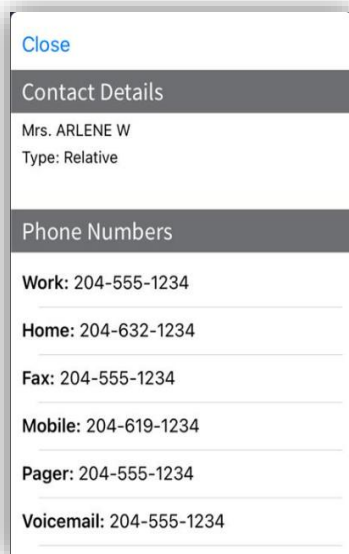


Figure 21 Phone Number Selection

Step 3. Confirm the number by selecting Yes

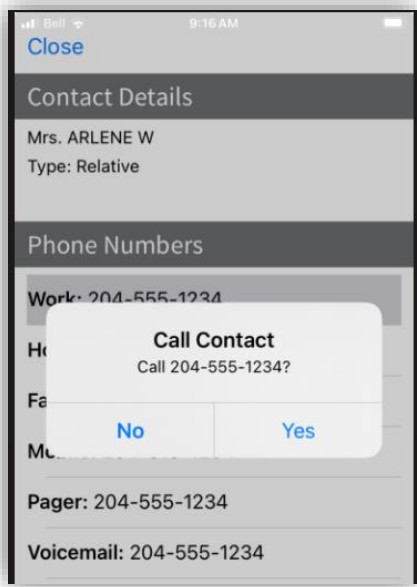


Figure 22 Call Contact Selection

Step 4. Select the number to initiate the phone call

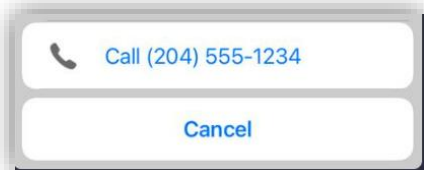


Figure 24 iPhone SE Calling

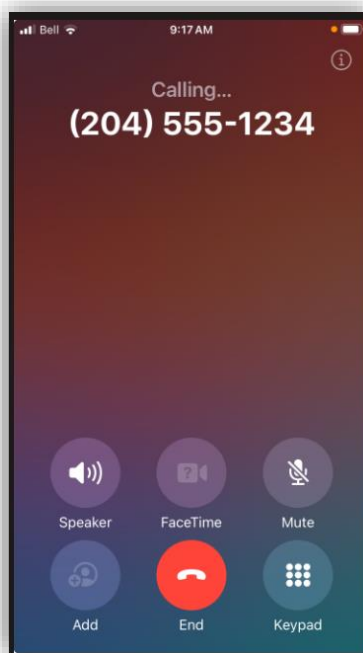


Figure 23 iPhone SE Calling Screen

2. Client Identity Verification

Step 1. The Client Identity Verification will become available once the visit has been started.

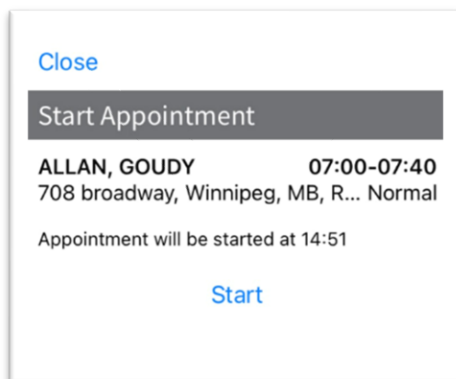


Figure 25 Starting a Visit

Step 2. A listing of Client Identifiers will appear. Select the first observation in the list.

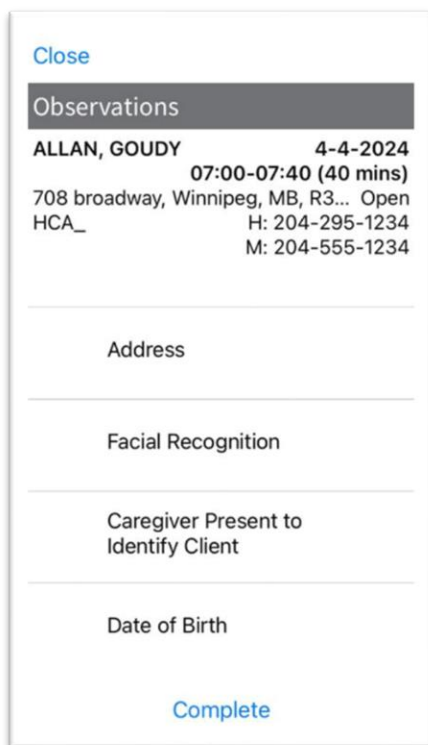


Figure 26 Client Identifiers

Step 3. Select into the red highlighted field and select Yes or No. Complete this for all listed client identifiers.

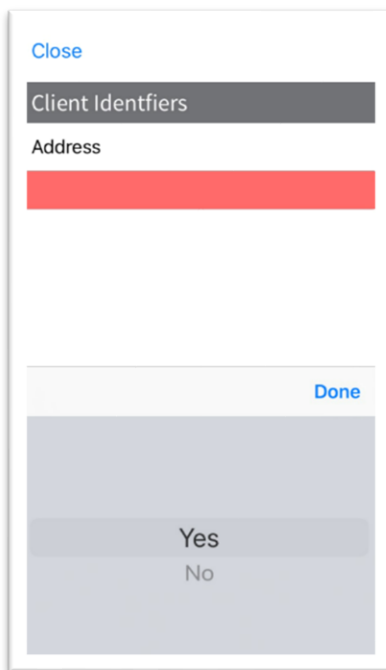


Figure 27 Documenting Client Identifiers

Step 4. Use the Prev and Next buttons to move to through the activity list. To return to your activity list, tap the List button at the bottom of the screen.



Figure 28 Previous and Next Button

Step 5. Once you have completed all the Client Identifiers, select to go back to the List, from this view you will be able to select Complete.

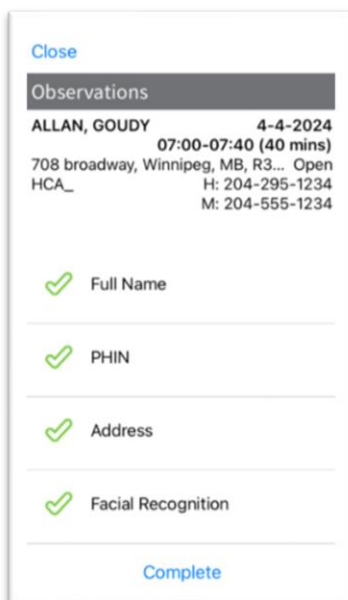


Figure 29 Client Identifiers Completed

3. Document Care Plan Tasks

Step 1. After you have completed the Client Identity Document, the Document screen appears with a list of Care Plan Tasks for the client.

Step 2. In the Document screen, select the task you want to document.

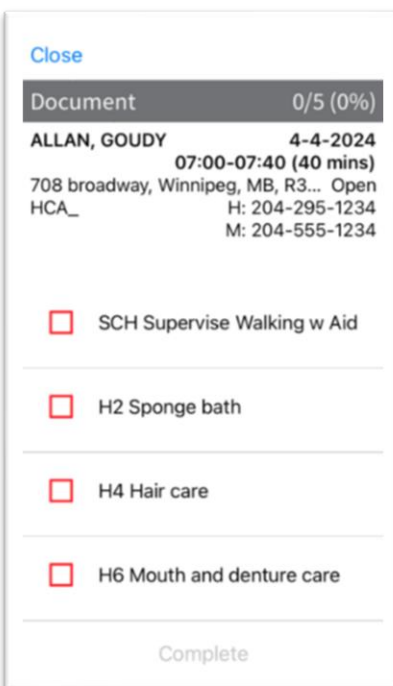


Figure 30 Document Screen

Step 3. Select into the red highlighted field and select Complete or Not Complete, then select done

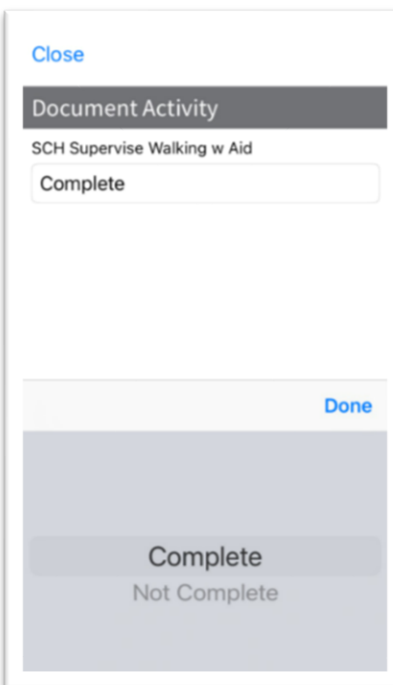


Figure 31 Documenting Tasks

Step 4. If you select Not Complete, a reason will be required. Select into the red highlighted field to select a reason, proceed to select OK

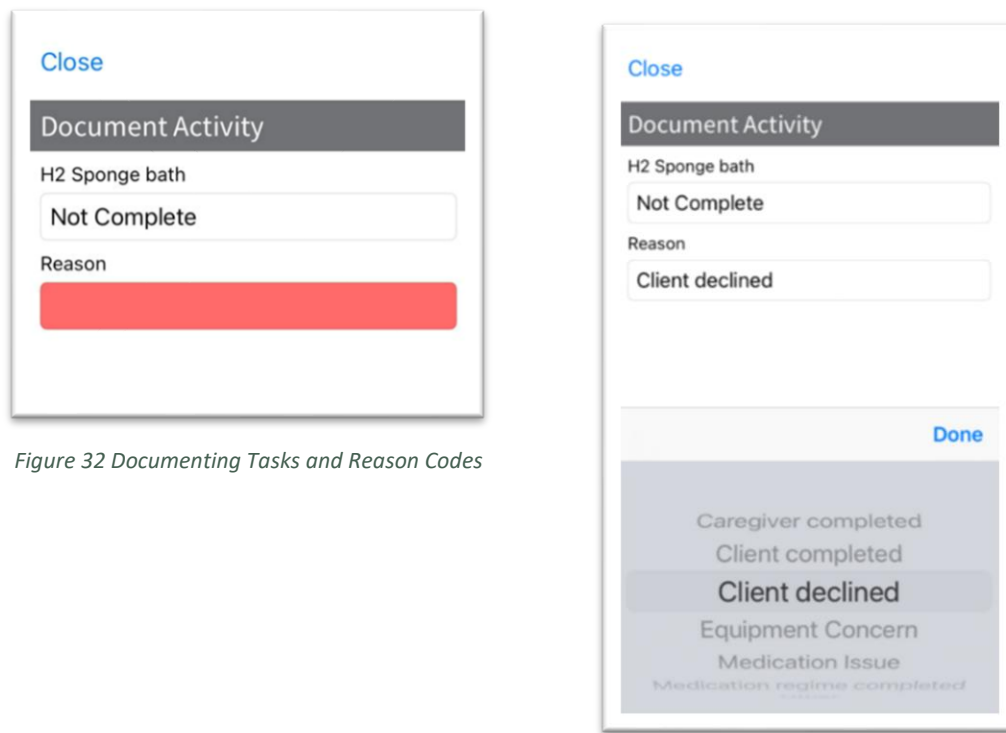


Figure 32 Documenting Tasks and Reason Codes

Step 5. Use the Prev and Next buttons to move to through the activity list. To return to your activity list, tap the List button at the bottom of the screen.



Figure 33 Navigation Icons

Step 6. If you need to view the details of a care plan task prior to beginning the task, return to the Appointment Details screen by selecting close on the top of the screen then tap the care plan activity to expand the details

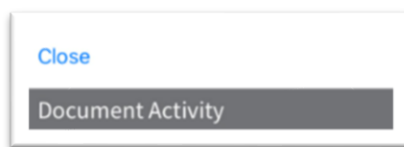


Figure 34 Closing the Document Details Screen

Step 7. Return back to the Document screen by tapping the Complete Documentation

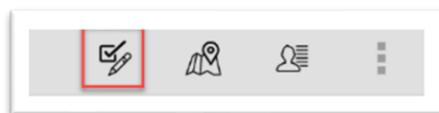


Figure 35 Complete Documentation

Step 8. The list will update based on whether the task was Completed or Not Completed. All documented tasks will have a green check mark. An entry in red indicates the activity was marked Not Complete. Select Complete

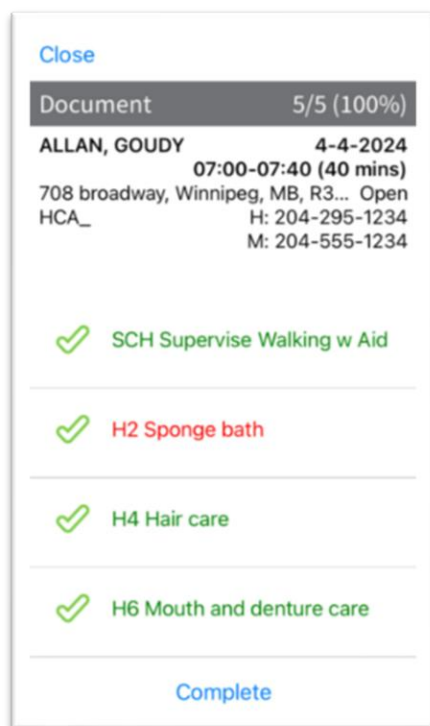


Figure 36 Completed and Not Completed Task View

Step 9. To complete the visit, review the information and update with any comments and select Complete.

Step 10. The client visit will now be updated to complete.

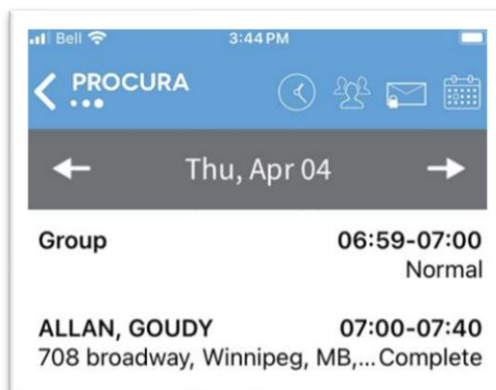


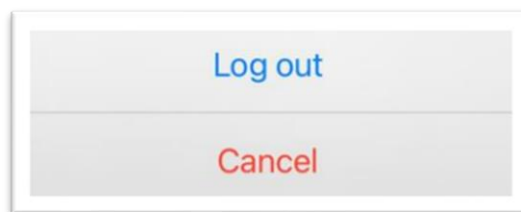
Figure 37 Completed Visit View

4. Refresh or Log out of Procura Mobile

Step 1. From the Schedule View, select the Refresh menu to refresh your client visits.



Figure 38 Refresh and Log Out



Step 2. From the Schedule View, select the Ellipses menu and select Log out.



Figure 39 Log Out