

Procura Mobile & Employee Portal Direct Service Staff (DSS)

May 2024

Working Differently

Implementing Mobile Procura is requiring us all to work differently, remember





Don't Be Shy



If you have questions during the presentation Raise your hand!

We'll call on you at our first opportunity to answer (Someone else probably has the same question too)





Learning Objectives

- ✓ Working Differently
- ✓ New Mobile Devices
- ✓ Introduce the Procura Mobile App & Employee Portal
- ✓ Review what else is changing
- ✓ Review highlights from the Home Care Direct Service Staff Quick Reference Guide
- ✓ Practice using Procura Mobile features through hands-on exercises
- ✓ Shared Health Professionals Page
- ✓ Log into Live Production Mobile Procura







Working Differently

- You have been issued new mobile devices iPhone SE.
- The Procura Mobile app (Procura), Employee Portal (company portal), Outlook, and Microsoft Teams and a multifactor authentication app have all been downloaded on the device.



Procura Mobile App & Employee Portal

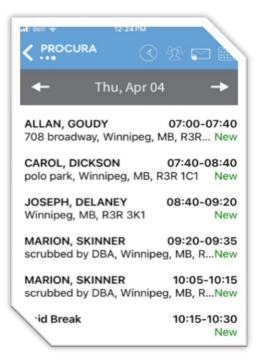
- Having the Procura Mobile App on your Mobile Device will provide you access to certain Procura features.
- It is directly connected to the Procura desktop application also known the Electronic Home Care Record (EHCR) used by all back office staff including Case Coordinator, Resource Coordinators and Scheduling Clerks.
- You will use the Procura Mobile app & Employee Portal to:
 - Check your schedule
 - Start and Stop client visits
 - Complete the Two Client Identifiers
 - See all the details about the Client and the visit(s)
 - Document tasks completed
 - See your availability as scheduled within EHCR





Five Main Screens

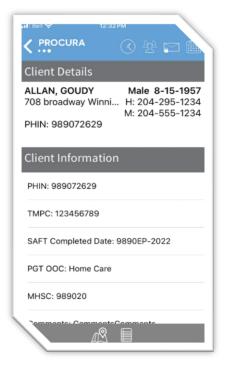
Schedule View



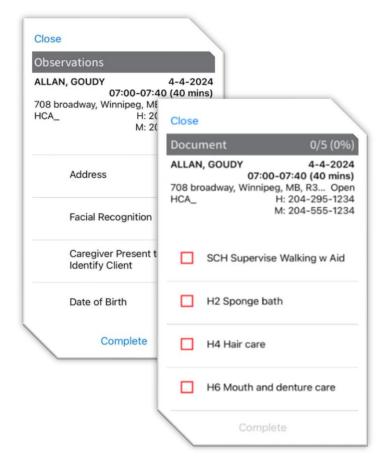
Appointment Details



Client Details



Client Identification and Tasks







Schedule View







PROCURA Tue, Apr 09 JOHN, PAWLYCHYN DAY-45 mins scrubbed by DBA, Winnipeg,... Complete BARBARA, YUSWAK DAY-30 mins scrubbed by DBA, Winnipeg,... Complete GISELE, CHARLETON DAY-30 mins scrubbed by DBA, Winnipeg,... Cancelled SOPHIE, SOLOMCHUK DAY-30 mins scrubbed by DBA, Winnipeg, M... Open **EVELYN, MIDDLETON** 08:00-08:20 scrubbed by DBA, Winnipeg, Updated Meal Break-Unpaid 11:30-12:00 Normal **Administrative Time** 14:00-14:45 Normal

Viewing Your Schedule

The **Main Tool Bar** appears at the top of the screen – this Tool Bar will remain visible as you navigate to other pages within the app.

You can toggle back and forth between the four days of your using the arrows that appear on either side of the date; if you do not have anything scheduled either yesterday or tomorrow, the arrow will not appear.

The schedule shows Client name, address, start/end time and visit status.



Scroll on any page throughout the application by touching the screen and dragging your finger up or down





Main Tool Bar

The **Main Tool Bar** has three main icons

- Schedule
- Clients
- Availability



Schedule View your schedule



Clients Patients you've visited



Availability View your current availability

The bottom of the screen has two main icons





Logout



Refresh



all Bell >

JOHN, E

scrubb

PROCURA

BARBARA, YUSWAK

GISELE, CHARLETON

SOPHIE, SOLOMCHUK

EVELYN, MIDDLETON

Meal Break-Unpaid

Administrative Time

r 09

scrubbed by DBA, Winnipeg, M... Normal

0

BA, Winnipeg, M... Normal

mins

DAY-30 mins

DAY-30 mins

DAY-30 mins

08:00-08:20

11:30-12:00 Normal

14:00-14:45 Normal

Tue.





Schedule View Visit Status

New - This visit hasn't been on your schedule for long and this might be the first time you're noticing it

Normal - This visit has been on your schedule since the last time you logged in and you've probably already seen it (new visits change to normal once you've downloaded them when the app is refreshed).

Updated - Something has changed about this visit since it was first assigned to you

Cancelled - This visit is cancelled – don't go!

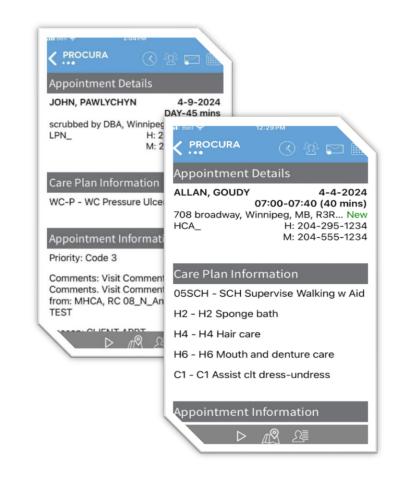
Open - You've started this visit and it's in progress

Completed - You've completed this visit

Closed/Verified – These visits are being processed for payroll







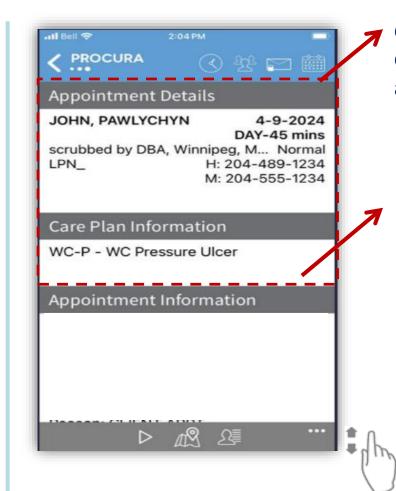




The Appointment Details are where you will find visit specific information; Client name, visit date, duration and care plan tasks.

To open **Appointment Details**, tap the visit on your schedule





The **Appointment Details** ribbon displays the visit date, time (day), duration, address, phone number and status.

The Care Plan Information ribbon serves 2 different purposes:

- 1. Displays the care plan tasks required for the visit
- 2. Warns if there are **Risks** on file
 - ▲ Check the **Hazards** section on the **Client Details** page

Touch the screen and drag up or down to scroll







Priority: Code 2

Comments: Visit Comments. Visit Comments. Visit Comments. Rebooked from: MHCA, RC 08_N_Anos, Melcho

TEST

Reason: CLIENT APPT.

Shift: DAY

Pattern: Every 1 Weeks

The **Appointment Information** and **Order Information** ribbons are used by the back office staff to set up client schedules

The **Appointment Information** ribbon displays the Shift code (used by nursing only) which is used to identify the type of visit for scheduling purposes, and the Pattern (onetime or regular)

The **Order Information** ribbon displays the Funder and the date the funding authorization began. The Funder DSS will see is **Community**

Touch the screen and drag up or down to scroll

Order Information

Funder: (NURSING) Nursing

Coordinated

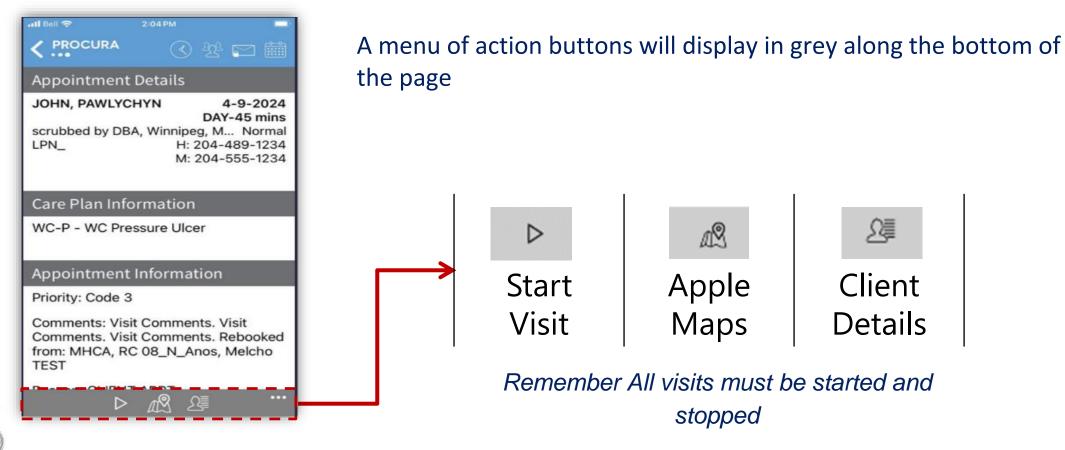
Start Date: 10/16/2023







Appointment Details Bottom Tool Bar



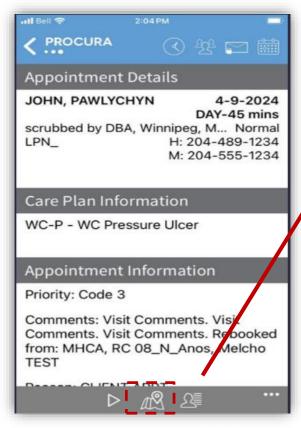








Apple Maps – Client Address Location



If you need directions to the client's address, tap the Appointment Details Tool Bar to map the address using Apple Maps

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







Tap to select a menu option

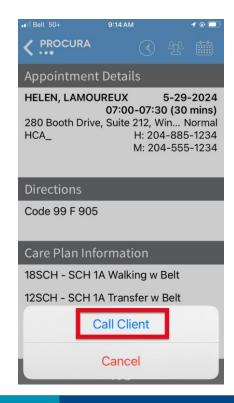




If you need to call the client, you can access the phone number from the

Appointment Details page



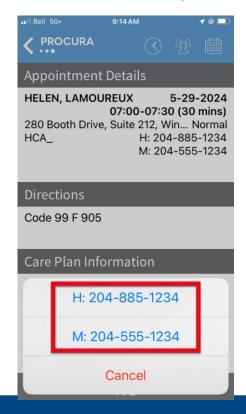






Determine the phone number you need to call, then select the phone

number to place the call









Client Details





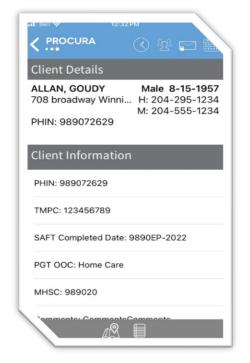
Client Details

Client Details are accessible from the **Appointments Details** page





The Client Details screen shows client information; Informal Contacts, Addresses, Allergies, Equipment and Hazards



The first few sections contain basic information repeated from the Appointment Details page, with the addition of Gender & Date of Birth



Touch the screen and drag up or down to scroll





Client Details

Client Informal Contacts

staff G, Type: Responsible person, Home: 204-555-1234, Mobile: 204-295-1234,

Pager: 204-555-1234, Work:

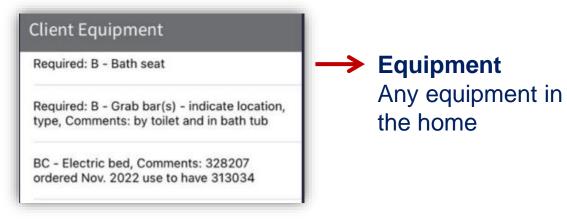
204-555-1234, Fax: 204-555-1234, Vo...

Client addresses

Place of Residence - 708 broadway Winnipeg MB

Client Hazards

Safe Visit Plan exists, Location: Hazard Location Text, Harm Client: True, Harm Employee: True, Comments: Go and open the back door and lea... Informal Contacts and Client Address



Hazards, you may see:

- Client unable to be left alone
- Emergency Preparedness Plan
- Falls Risk, high or medium
- Health Care Directive in place
- Option A Client Absent for Scheduled Visit Response Plan
- Option B Client Absent for Scheduled Visit Response Plan
- Option C Client Absent for Scheduled Visit Response Plan
- Oxygen in use
- Safe Visit Plan exists

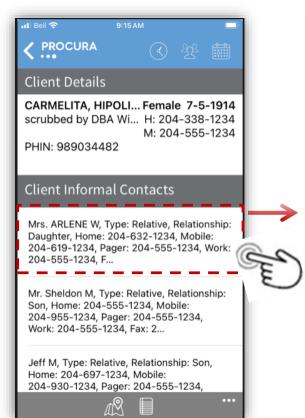




Calling an Informal Contact

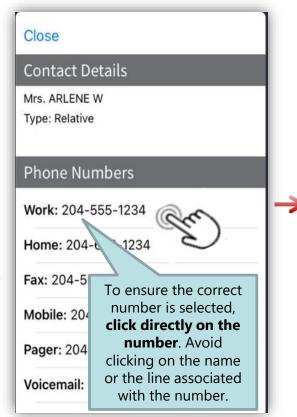


Select the Formal/Informal Contacts you would like to call



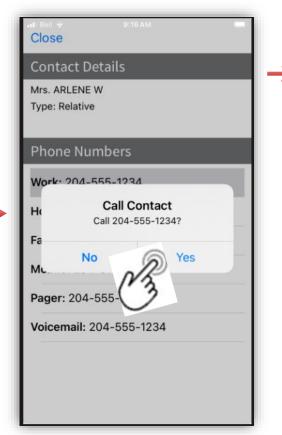
2

Select the phone number



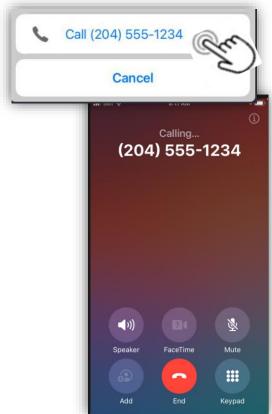
3

Confirm the number by selecting Yes





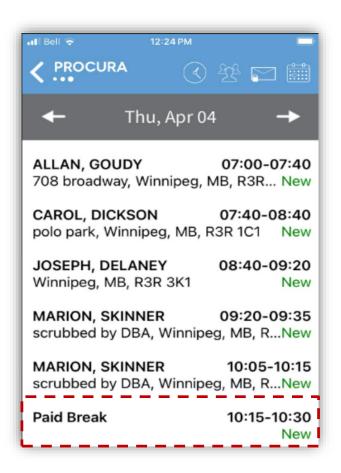
Select the number to initiate the phone call







Going on your Break & Attendance Types



All Attendance Type visits you see on your DVS now i.e. Paid Break, Meal Break-Unpaid, Administrative Time etc. will also appear as visits your schedule.

You will be required to start and stop these attendance type visits along with the client visits.

When going on a break, open the visit at the start, then close the visit when your break is complete.





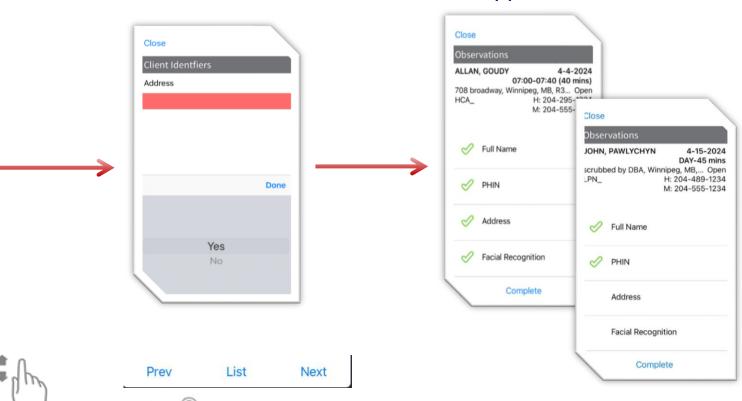
Two Client Identifiers and Tasks





Two Client Identifiers

 You will complete and record the Two Client Identifiers at the start of each visit in the Procura Mobile app.



Touch the screen and drag up or down to scroll

Complete

4-4-2024

07:00-07:40 (40 mins)

H: 204-295-1234

M: 204-555-1234

708 broadway, Winnipeg, MB, R3... Open

Close

HCA_

Observations

ALLAN, GOUDY

Address

Facial Recognition

Caregiver Present to

Identify Client

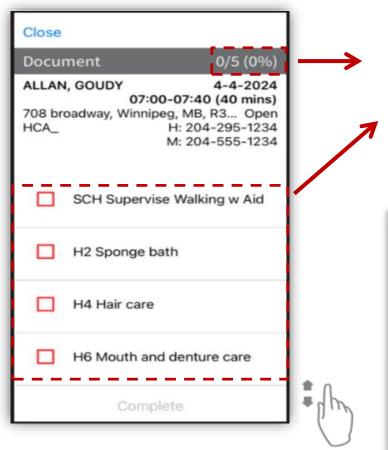
Date of Birth

Use tool bar to navigate to the Prev. or Next Client Identifier or to go back to the main list





Documentation of Complete and Incomplete Tasks



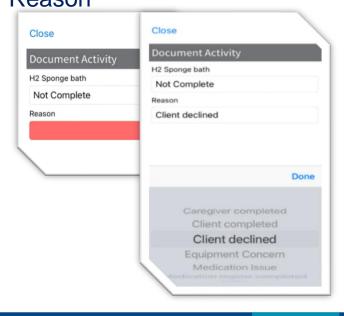
Touch the screen and drag up or down to scroll

- Number of tasks to be completed and the percentage complete
- Tasks to be documented as completed/not completed

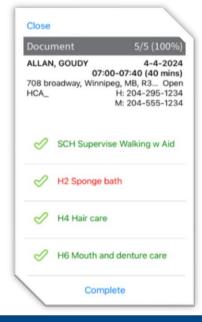
Completed Task



Not Completed Task with Reason



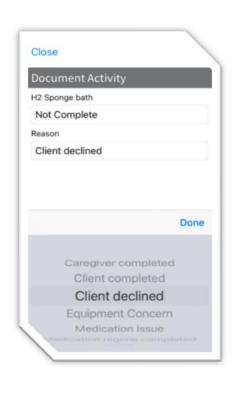
Final View







Documentation of Complete and Incomplete Tasks



Not Complete Task Reasons

- Caregiver Completed
- Client Completed
- Client Declined
- Equipment Concern
- Medication Issue
- Safety & Health
- Other

When to use each Reason

- The clients caregiver competed the task
- The client themselves completed the task
- The client declined
- There was an Equipment concern which prevented you from completing the task
- There was a Medication Issue that prevented you from completing the task
- There was a Safety & Health Issue that prevented you from completing the task
- There was a different reason for not being able to complete the task that was not listed





Procura Employee Portal

- The Procura Portal will provide DSS to view the next two weeks (14 calendar days) of your schedule.
- The Procura Portal also allows DSS to see their availability as entered within EHCR.
- Client Information and Visit details can be viewed in the Employee Portal
- DSS will also see attendance types in Employee Portal that are not viewable in the Procura Mobile app i.e.) Vacation, Personal Sick etc.



Logging In – Employee Portal

1. Access to the Procura Portal is available from the Procura App or from a computer using the URL below



2. Enter the same Username and Password you use to access Procura Mobile and select Login

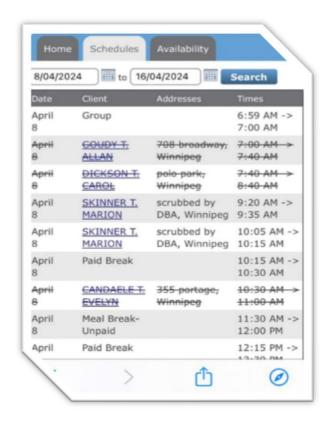
Home	
Log On	
User Name	
Password	
Remember me?	
	Login

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

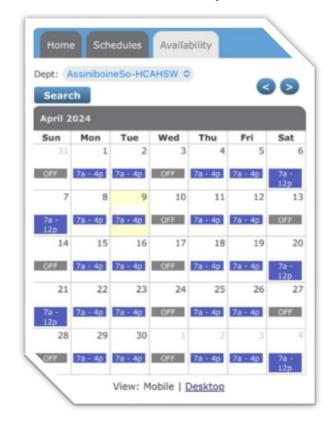


Two Main Screens

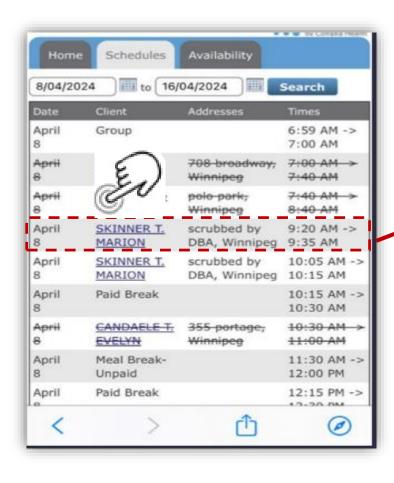
Schedules



Availability





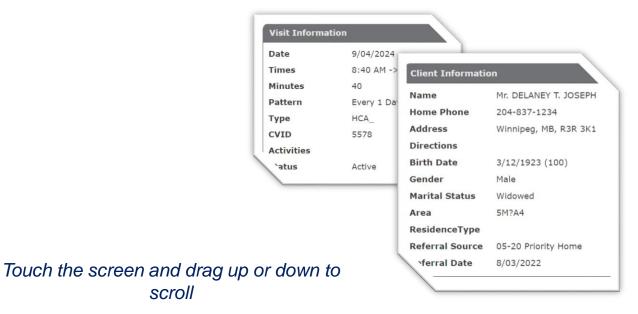


Schedules

scroll

The **Schedules Tab** shows your schedule for 2 weeks (14 days) of scheduled visits.

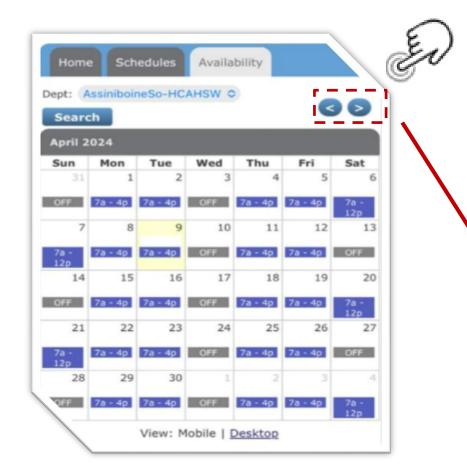
Select a **client name** to see: Visit Information, Client Information, Client Reference Numbers, Contacts, Care Plan, Hazards etc.







Availability



The **Availability Tab** will show your availability.

This tab is to view information only, you cannot edit information.

Select the arrows to scroll through different months.



What else is Changing?

- DSS will see two new Split Shift attendance types:
 - Split Shift Pay Client
 - Split Shift Pay Home
- Picking Up and submitting the Daily Visit Summary (DVS) will no longer be required.
- AMTR's & Client Identification Record (forms) must continue to be removed from Client Home files and handed into the office bi-weekly
- If printed client/visit information is required, DSS will be provided a Report of Service
 - In the weeks following Go-Live in your community area, gather and return all printed client information to your Resource Coordinator





What else is Changing?

• A new Home Care Timekeeping Expense Claim Form for Direct Service Staff has been created for DSS who are authorized to claim expenses i.e.) bus fare, to use.

Home Care Timekeeping Expense Claim Form for Direct Service Staff							
		24-Apr-24					
	Name (please print)	Employee Number	Postion				
Office Address			Program				
	Banking Information						
WOTE: Expenses are deposited to the same bank account as your payroll deposits. If this bank account has changed since your last submission, you must contact payroll to update your banking information.							
	Signature		Date	Work Phone #			
Date	Date Details of Expense Claims						
		(List each expense type s	separateigj				
			TOTAL	EXPENSES			
TOTAL EXPENSES					\$ -		
Authorized By Printed Name		Autho	norized By Signature		Date		
	Special Instructions						
	ATTACH ORIGINAL RECEIPTS						





Home Care DSS Expectations Quick Reference Guide

- The DSS Expectations document has been revised. Some highlights include:
 - DSS must comply with all Winnipeg Regional Health Authority and Shared Health policies and procedures.
 - Work will be assigned primarily within your Community Area; however, you may be required to work in ALL Community Area's throughout the Winnipeg Regional Health Authority.
 - Any unexpected/sudden changes or adjustments to schedules must be communicated to the SC,
 RC or After Hours (AH) immediately.
 - During breaks in schedules which create downtime DSS may be assigned alternate work.
 - These are not scheduled Paid Breaks or scheduled Unpaid Meal Breaks





Home Care DSS Expectations Quick Reference Guide

- Highlights continued
 - DSS must respond to messages left by SC/RC/AH within 30 mins whenever possible. If unable to respond within 30 mins, an explanation must be provided. DSS are encouraged to make personal appointments on their day off whenever possible.
 - DSS will report workplace health and safety issues, any changes in the client's physical or emotional well-being, living conditions and any other situations that affect the plan of care.
 - DSS will report any loss or damage to client/employee personal property while in the course of their duties.







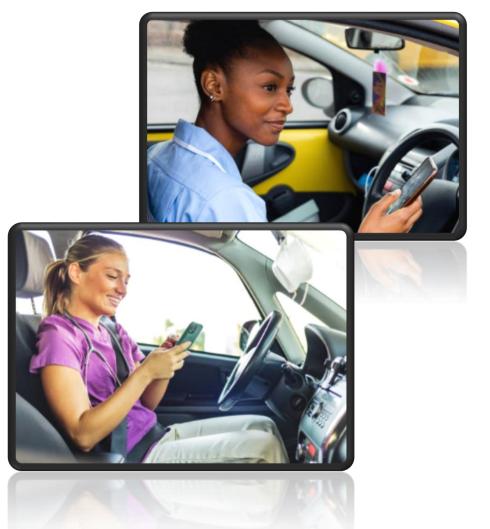


Day in the Life – Training Scenarios



Begin Your Day

- A. Review your Schedule
- B. Look at your first visit and review the appointment details
 - Do you know where the address is or do you need to use the map?
 - What are the tasks to be completed?
- C. Review the client details
- Review the care plan, hazards, allergies etc.







Travel to the first client











Try Me! – Scenarios

- 1. You arrive at your first client's door and it is time to start your visit.
 - Complete screening and Two Client Identifiers.
 - Document all activities as if they were completed, and complete and close the visits.
- 2. You arrive at your second client's door and it is time to start your visit.
 - Complete screening and first two client identifiers.
 - Document all activities, but mark some incomplete.
- 3. It's time for a Break!
 - Start and end a scheduled break
- 4. You arrive at your third client's door and it is time to start your visit.
 - · Complete screening and first two client identifiers.
 - Document all activities, and continue to try out Procura

Between visits

- ✓ Refresh S your Schedule
- ✓ Review Appointment and Client details for the next client







Procura Mobile – Logging In

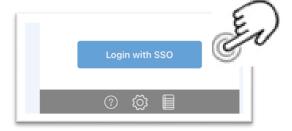
1. Locate the Procura Mobile application on your device



2. Select the icon to open the log in page



3. Select **Login** with Single Sign On (SSO)

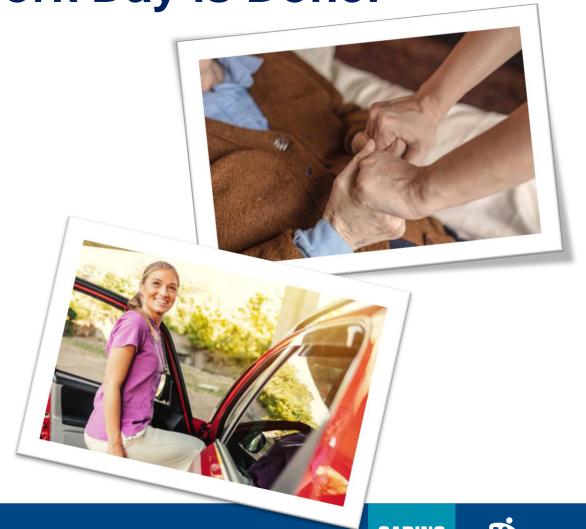


Once you have successfully logged in, the main page of the application will open showing your schedule for the current date.



Your Work Day is Done!

- Refresh schedule
- Log out of Procura
- Lock or turn off your phone
- Charge your phone for the next day





Next Steps

- You've been provided your final DVS. Continue to follow your DVS.
- On your Go-Live date begin to use the Procura Mobile app and follow your DVS
 - Report any issues or concerns to your RC immediately
- Hand in your DVS as normally scheduled
- Hand in any printed Client Information to your RC
 i.e.) Client Profile Reports, Client Data Sheets, Reports of Service









Prior to leaving today we would like to gather feedback on the training today

 The last slide of today's presentation will show you two options to complete a short questionnaire





Outlook

To ensure Outlook is working on your mobile device some additional App

Store Settings need to be set up

Select Settings

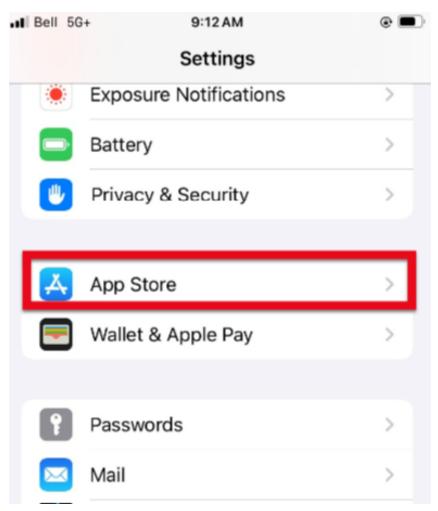






Outlook

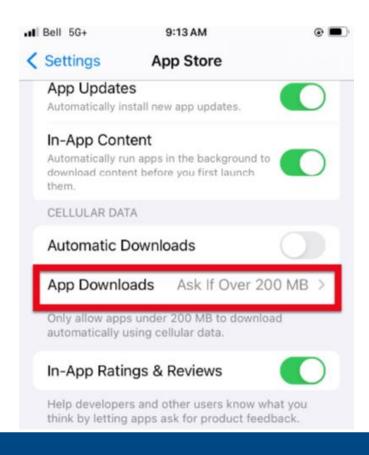
Select App Store



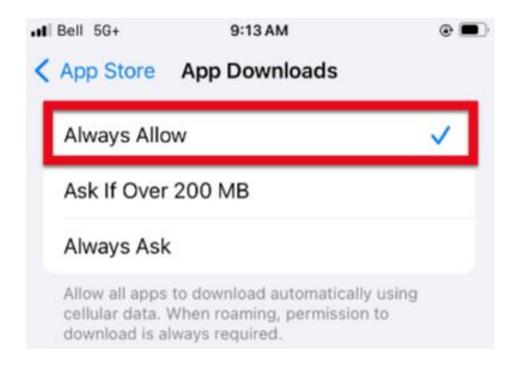


Outlook

Select App Downloads



Select Always Allow







Professional Page – Short Cut

1. Locate Safari (web browser)



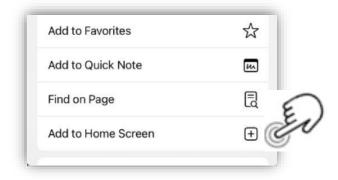
2. Enter the below into the URL

https://professionals.wrha.mb.ca/

3. Select box with an up arrow on the bottom tool bar



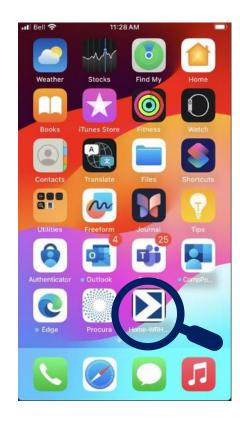
4. Scroll down and select Add to Home Screen



5. The "Add to Home Screen" tab will appear, select Done.



6. The short cut will not be available on your main screen







Procura Mobile Production – Live Environment

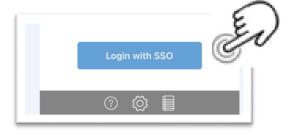
1. Locate the Procura Mobile application on your device



2. Select the icon to open the log in page



3. Select **Login** with Single Sign On (SSO)



You may be prompted to complete MFA



You are now in the <u>live/production</u> environment of EHCR/Procura.

While you will be able to see your schedule, please do not play in this application



Procura Portal Production – Live Environment

Access to the Procura Portal is available from the Procura App or from a computer using the URL below



On the **Main Tool Bar** navigate to the calendar icon at the top of the application



- You will be prompted to change your password
 - 1. Enter your **user name**

Home

2. Temporary Password "ehcrpass"

After the password is reset you are now able to login



Employee portal is also available on a computer by going to the below URL.

Note – you will need to use the MFA App on your WRHA mobile device to be able to access this.

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







Prior to leaving please compete the questionnaire. THANK YOU!!!

Option 1

Option 2

Locate Safari (web browser)



2. Enter the below into the URL

https://forms.office.com/r/crpERJ39f7

1. Locate Camera Application



2. Scan QR Code





