Procura Mobile and Procura Portal

Direct Service Nurse Training

Learning Objectives

- ✓ Understand the purpose and functionality of Procura Mobile for caregivers.
- ✓ Navigate the Procura Mobile and Employee Portal
- ✓ Learn how to document care and complete visits using Procura Mobile.
- ✓ Practice using Procura Mobile features through hands-on exercises.
- ✓ Identify and troubleshoot common issues when using Procura Mobile.

Procura Mobile

Procura Mobile provides DSN with access to certain Procura features from their WRHA mobile device. It is directly connected to the Procura desktop application used by all office staff including NRCs, NSCs.

This mobile application is used to

- ✓ Check your schedule
- ✓ View appointment details
- ✓ View client details and notes
- ✓ Document care
- ✓ Start and complete visits

Working Differently

Current State

- Paper NRS
- Return of completed NRS to office
- Audit by NRCs/Admin of returned NRSs

Procura Mobile

- Electronic schedules
- No paper NRS to return for DSN issued Mobile devices
- Paper NRS generated for DSN not issued mobile devices
- Auditing of return for only DSN issued paper NRS.

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Working Differently

Current State

- Paper Client Identification Record to document identifiers used to provide care

Procura Mobile

- Electronic documentation of client identifiers used

- * Paper copy will be present in-home file for nurses not issued WRHA mobile devices and Back up agency nurses to document.

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Working Differently

Current State

- Paper Intergrated Progress notes

Procura Mobile

- Electronic documentation in dated notes. Dictation available in app in certain situations

- * Paper copy will be present in-home file for documentation as well. Only certain situations for documentation in Mobile App (due to some nurses not issued mobile devices)

- * Dated notes in EHCR will be visible to nurse from past 30 days.

Working Differently

Current State

- Faxing documents to HBCC if sending client to Urgent Care/ER for unscheduled visit

Procura Mobile

- Electronic documentation in dated notes. Dictation available in app.
- Documentation visible to HBCC to print and share with UC/ER staff
- NRC can see notes to follow up as well with HBCC

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Working Differently

Current State

- DSN have to call NRC to inquire about client issued equipment

Procura Mobile

- DSN can view information such as client equipment, Allergies, Diagnoses, Hazards

Working Differently

Current State

- DSN exchanging client visits with each other – notifying Nursing Scheduling Clerk

Procura Mobile

- DSN must immediately notify NSC or After Hours of exchange of client as client will need to be re-booked to nurse so the client visit will appear in nurse's schedule to start and stop visit and document.

Working Differently

Current State

- Calling in at start of evening shift to After Hours on weekends/recognized holidays to verify working

- Calling in at end of all evening shifts.

Procura Mobile

- DSN will start each shift in the app and end each shift in app.

- No calling into After Hours before or end of shift.

- Office Staff (NRC, After Hours) will receive alerts if staff have not started /completed their shift in app.

Working Differently

Current State

- Paper mileage form- record mileage daily and submit monthly to NRC

Procura Mobile

- No Change at present. Record mileage daily and submit Mileage form monthly

- * Communication will be sent out when automated mileage for DSN will occur (phase 2)

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Working Differently

Current State

- Changes to client schedules (for example- cancellations, activity code updates, etc.)

  via phone (urgent) or SCNF (non- urgent)

Procura Mobile

- No Change. Continue to communicate changes to NSC via phone or SCNF.
- Essential to ensure activity code changes are communicated as DSN will need to verify each nursing activity completed and if not completed, a reason must be selected for each activity not completed.

Working Differently

Current State

- Daily planning- reporting to office

Procura Mobile

- No Change. Continue to communicate changes to NSC via phone or SCNF.
- Essential to ensure activity code changes are communicated promptly as DSN will need to verify each nursing activity completed and if not completed, a reason must be selected for each activity not completed.

Working Differently

Current State

- Nursing Clinics – printing of daily visit summaries

Procura Mobile

- No Change. Daily visit summaries will be printed.
- Clinic will be Phase 2 launch

Working Differently

Current State

- Four week posting (printed) of rotation

Procura Mobile

- No Change. Printed 4-week copy in office
- View of schedule will be present in Employee Portal.

Working Differently

Current State

- DPN Role – checking that all NRS are picked up by staff.

Procura Mobile

DPN role :

- Responsibilities will be to check for faxes and communication with After Hours nurse
- Duration in office may be decreased as no check-in process needed for schedules.

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Working Differently

Current State

- Income protection process
  - Calling into NSC during weekdays
  - Calling into After Hours during weekends/holidays

Procura Mobile

- No change in existing process.

Working Differently

Current State

- Weekends/Recognized Holidays – pick up of NRS and attachment

Procura Mobile

- Check in at office for attachments (prescriber orders/Referrals)

Working Differently

Current State

- AUA – Additional Shift sign up process

Procura Mobile

- No Change.

Professional Page – Short Cut

1. Locate Safari (web browser)
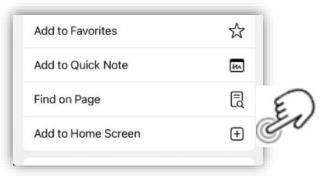
2. Enter the below into the URL

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

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Standard Operating Procedures and User Guides

https://professionals.wrha.mb.ca/procura-mobile-app-project/

Nursing Skills Online- Remote Access

With Data on the phones :

- DSN can access Nursing skills online.

- Email sent to DSN WRHA Email.

  - Click the link.

- User name is DSN's WRHA Email example : MSomebody@wrha.mb.ca

- Password is hello . Change this after initial log in.

- **https://login.elsevierperformancemanager.com/systemlogin.aspx?virtualname=wrha-canada**

- Link will work on any phone and laptop.

Mobile Shortcut for NSO

Optional: Create a mobile shortcut for your iOS or Android device by completing the following steps:

Android instructions:
- Open Clinical Skills on your Android device.
- Tap the three-dot/Overflow menu icon (⋮) in the upper-right corner.
- Select *Add to Home Screen*
- In the window that opens, edit the name, if desired, and tap *Add.*
- Tap *Add* again in the next window
- A shortcut icon will now appear on your device's home screen

iOS instruction:
- Open Clinical Skills on your iOS device.
- Tap the Share icon (square with up-arrow: ⬆) at the bottom (iPhone, iPad) or at the top (iPad) of the screen.
- Scroll to and select *Add to Home Screen.*
- Edit the name, if desired, and tap *Add.*
- A shortcut icon will now appear on your device's home screen.

Logging In – Procura Mobile

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.

Four Main Screens

Schedule View

Appointment Details

Client Details

Client Identification and Tasks

Schedule View

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 to two days of your schedule or preview tomorrow's schedule 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 clients names, addresses, and visit status. Scheduled times will give you a mix of timed visits and/or timeless visits

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

Viewing Your Schedule- Attendance Types

- Attendance types (Coffee breaks, meal breaks, admin time) will appear on your schedule

- A new attendance type will now be on the Scheduled.

- Called Start/Stop Shift

Attendance Type : Start/Stop Shift

- For every shift, there will be an attendance type called "Start/ Stop Shift"
- Nurses are to start the shift each day
- Nurses are to stop the shift at end of each shift.
- Will be present for:
  - Day shifts
  - Early evening
  - Late evening
  - Nights

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Starting Visits/Attendance types
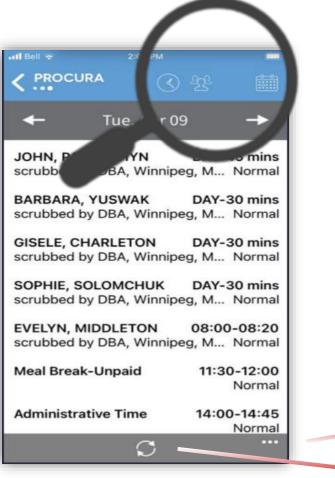
- There is a right facing triangle that is pressed to start the visit "

- Press the triangle to start the visit or attendance type.

- You do NOT have to start the visit to review the client information in each visit before going to see the client.

Main Tool Bar Overview

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.

Schedule
View your schedule

Clients
Patients you've visited

Availability
View your current availability

Logout

Refresh

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What is Visit Status?
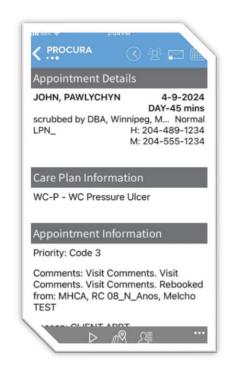
The visit status tells you about your interaction with each visit

- **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)

- **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

Appointment Details

Appointment Details

The Appointment Details, where you will find visit specific information like who, when, where and what tasks are on the care plan.

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

The **Appointment Details** ribbon displays the visit date, time, duration, address, phone number and status.
If there are directions to home e,g. Code 99 it will appear on this page.

Care plan information lists nursing activities

Appointment information lists nursing activities

Touch the screen and drag up or down to scroll
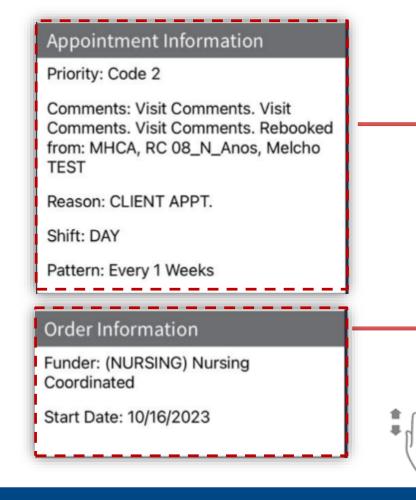
Example of Location of Directions if present

Appointment Details

Appointment Information

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

Order Information

Funder: (NURSING) Nursing Coordinated

Start Date: 10/16/2023

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 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, date the funding authorization began, case coordinator and contact information

Touch the screen and drag up or down to scroll

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Appointment Details Bottom Tool Bar

A menu of action buttons will display in grey along the bottom of the page

Start Visit | Apple Maps | Client Details | Call Client
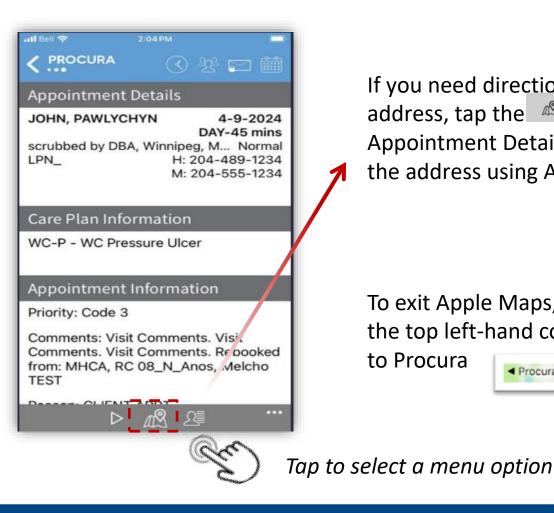
All visits must be started and stopped

Tap to select a menu option

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Apple Maps – Client Address Location

If you need directions to the client's address, tap the [icon] icon from 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

◄ Procura

Tap to select a menu option

Click Procura to return to appointment details

Calling a Client

Tap to select a menu option

Access the Calling Feature:

• Select the ellipses (three dots) to bring up the calling feature.

Initiate the Call:

• Select "Call Client" to make a phone call.

Choose the Phone Number:

• You will be prompted to select the phone number you wish to call.
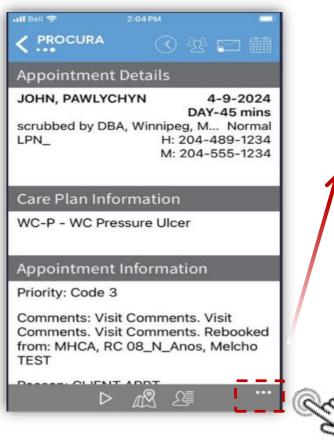
Alternate Access:

• This feature is also available within the Client Details ellipses.

Call Client

H: 204-334-1234

M: 204-555-1234

Cancel

Client Details

Client Details

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

The Client Details screen shows *client information, 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 - DSN

Client Formal Contacts

Dr. George B, Type: Physician (specialist), Home: 204-555-1234, Mobile: 204-555-1234, Pager: 204-555-1234, Work: 204-925-1234, Fax: 855-472...

→ **Formal Contacts**
Professional Contacts (Physicians, Pharmacy, Power of Attorney)

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

→ **Informal Contacts and Addresses**
Contacts that are non professionals (friends, family, etc.) and Client addresses

Client Allergies

clozapine, Degree: Allergy, Type: Medicine, Intervention Notes: Intervention Text

No known environmental allergy, Degree: Allergy, Type: Physical, Intervention Notes: Intervention Text

No known food allergy, Degree: Allergy, Type: Food, Intervention Notes: Intervention Text

→ **Allergies**
Includes name, degree (allergy or sensitivity) and type (physical, food, medications)

Client Equipment

Required: B - Bath seat

Required: B - Grab bar(s) - indicate location, type, Comments: by toilet and in bath tub

BC - Electric bed, Comments: 328207 ordered Nov. 2022 use to have 313034

→ **Equipment**
Any equipment in the home, Languages, Likes, and Dislikes

Calling a Formal/Informal Contact

1

Select the Formal/Informal Contacts you would like to call

2

Select the phone number

To ensure the correct number is selected, **click directly on the number**. Avoid clicking on the name or the line associated with the number.

3

Confirm the number by selecting Yes

4

Select the number to initiate the phone call

Client Details

Client Diagnoses

(G710) Muscular dystrophy, Date: 1/1/2007, Comments: Diagnosis Comments Text

(E785) Hyperlipidemia, Date: 1/1/2007, Comments: Diagnosis Comments Text

(G459) Transient cerebral ischemia (TIA), Date: 1/1/2007, Comments: Diagnosis Comments Text

Diagnoses

List of current client diagnoses, including Infectious Diseases and required precautions

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...

Hazards

In Procura, Risks are called 'Hazards' and they have their own section in the client file and will refer to the presence of Safe Visit Plan, Client absent for scheduled visit response plan, Emergency Preparedness Plan

Client Details Tool Bar

A menu of action buttons will display in grey along the bottom of the page

Apple Maps – directions to the client's address

Notes – used to document client observations not captured in the Care Plan.

Client Activity – allows you to see the client activity (passed visits)

View past notes – allows you to see past client notes

DSN Workflow Process if Issued Mobile Device

Review of Handout

1.0	Turn on mobile device at start of shift.
2.0	Log onto Procura Mobile App.
3.0	Open the Start/ Stop Attendance type and click start.
4.0	Review client schedules for the day and prioritize schedule. Review appointment and client details to assist in prioritization.

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DSN Workflow if Issued Mobile Device

5.0	Use map on app to find best route to client's home. Drive to client home.
6.0	At client door, start the client visit on app.
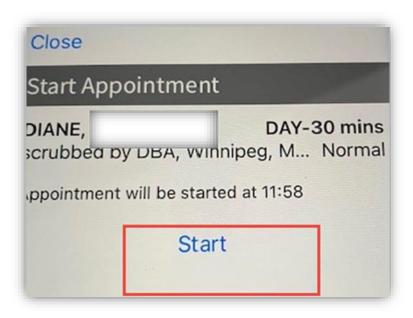
Starting the Visit

To start the visit

- Select start when you are at client door. ▷

The Start Appointment screen will then appear and click start.

Appearance on Screen

Once visit is started – Client Identifier Observation document
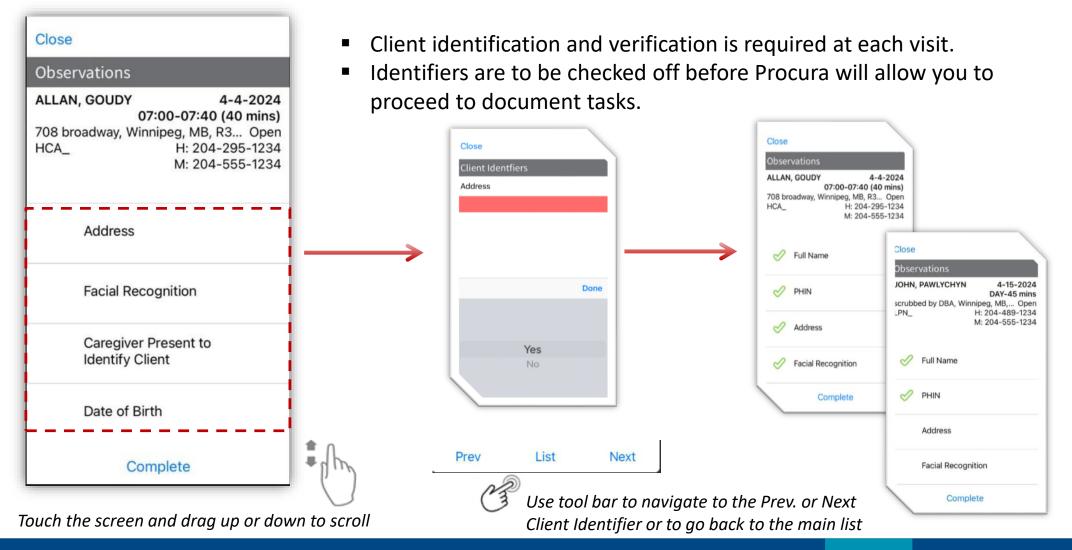
The client identifier document will appear. Tap on the 1st identifier you use to begin.

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Client Identification

- Client identification and verification is required at each visit.
- Identifiers are to be checked off before Procura will allow you to proceed to document tasks.

Touch the screen and drag up or down to scroll

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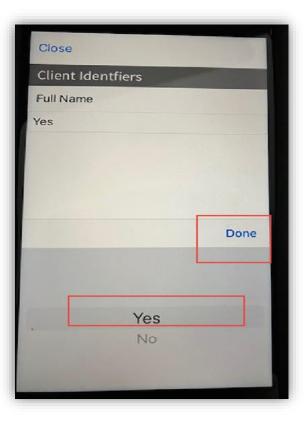
Client Identifiers Observation Document

Select yes to the 1st identifier you used. Then select done
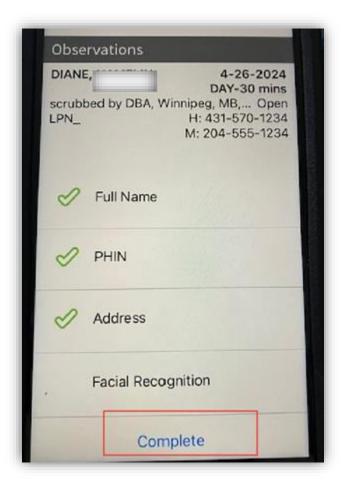
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Client Identifiers Observation Document

Select the 2nd Identifier. If you used 3 identifiers, select the 3rd identifier . Select list . Green check marks will appear for the identifiers used (Note : You do NOT have to select a no response to the un-used identifiers). Select Complete

Creating Dated Not

To get to the dated note creation page , can click on Pencil icon or three dots

Dictation option available

- Dictation of dated note is option. DSN will need to prompt punctuation needed. Example " Client discharged from nursing services effective June 1,2024 as pressure injury has healed period Case coordinator June Smith and Prescriber notified of discharge period"
- Review for grammar and spelling.
- Select save.
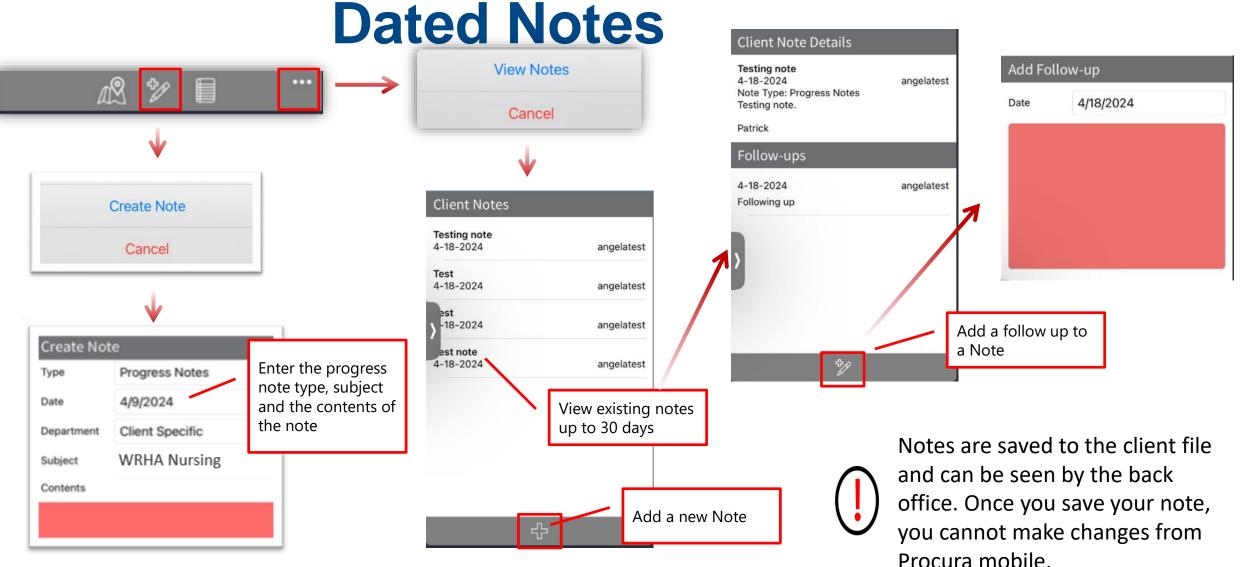
Dated Notes

Enter the progress note type, subject and the contents of the note

View existing notes up to 30 days

Add a new Note

Add a follow up to a Note

Notes are saved to the client file and can be seen by the back office. Once you save your note, you cannot make changes from Procura mobile.

Dates notes are also available from the Appointment Details

Dated Notes

Type	How/When to use each Type
Communication - Client	To document phone communication with client that occurred such as client cancellations/declines visit.
Communication – Formal Support	To document phone communication with formal supports such as Prescriber, NRC, CC if nurse is not present in home to document in home file.
Communication – Informal Support	To document phone communication with client family/caregivers where access to in-home file is not available.

Dated Notes

Type	How/When to use each Type
Progress Notes	Subject : Assessment – Home Visit To document a one-time only visit such as wound consult or medication consult where no further nursing intervention is required.
Progress Notes	Subject : Discharge Summary To document discharge note when client no longer requires nursing care including termination.
Progress Notes	Subject : Results/Report- ABPI To document test results such as ABPI/toe pressures.

Dated Notes

Type	How/When to use each Type
Equipment	To document equipment ordered, requests for repair or requests for pick up.
Supplies Master List	To document master list of supplies ordered for client.

Dated Notes

Type	How/When to use each Type
After Hours (for AH use only)	DO NOT USE
Approvals	DO NOT USE
Clt Status Change	DO NOT USE
Delegated Task	DO NOT USE
Exceeding HC Svc Lev (Over Svc)	DO NOT USE
Hospital – Admission/Discharge	DO NOT USE
MDS-HC Data Import	DO NOT USE
Over Protocol	DO NOT USE
Service/Schedule	DO NOT USE
Transfer Summary – Comm Area/Dept	DO NOT USE

At present only the previous selected types will be used by nursing with initial roll out. Phase 2 may involve expanded use.

Standard Operating Procedure- Dated Notes
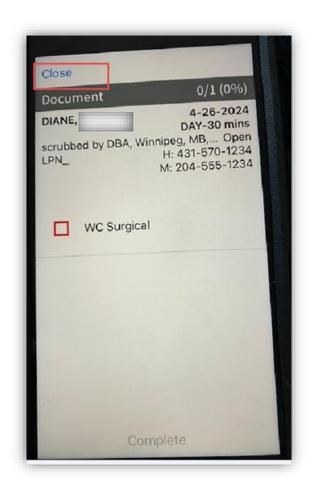
Let's review the SOP Handout on Dated notes.

Nursing Task Document

- Once the client identifier document is completed, the task document will automatically appear.

- Do not complete the document .

- Select close at this time

DSN Workflow if issued Mobile Device

7.0	Verify client identity using at least two client identifiers. In mobile app, use the client identifiers document to confirm which identifiers were used. Mark yes to the identifiers used. Complete document.
8.0	Review client in-home file and provide client nursing activities.
9.0	Document on client flow sheets and integrated progress notes care provided * See dated note SOP for dated notes to document on App. Exception : Palliative nurses will continue to document in EMR.

DSN Workflow if Issued Mobile Device

| 10.0 | In mobile app, document nursing activities performed by selected complete or not completed to each activity listed. A reason must be selected if an activity is not completed |

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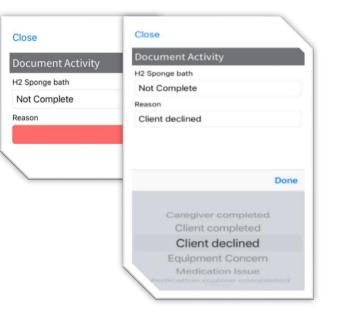
- Number of tasks to be completed and the percentage complete
- Tasks to be documented as completed/not completed

Touch the screen and drag up or down to scroll

Completed Task

Not Completed Task with Reason

Final View
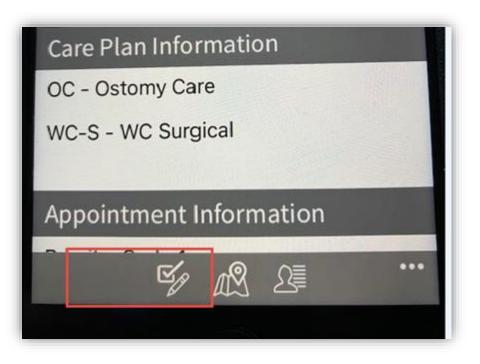
To get to the Document of Tasks Document in App
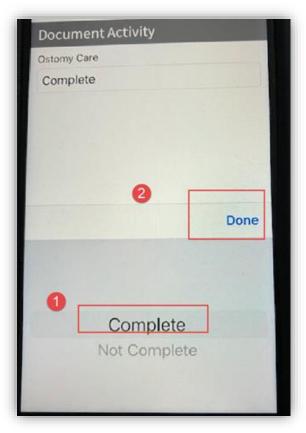
- Click on the Paper and pencil icon On Appointment details page

Document if task completed or not completed
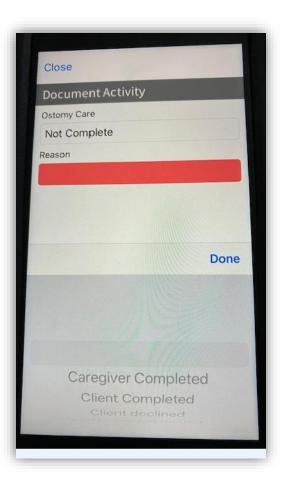
For Tasks marked as not completed

IF not completed is selected for a nursing task/activity, a reason for non-completion must be selected.

Documentation (Tasks)

Not Completed Tasks (Reasons)	How/When to use each reason
Caregiver Completed	Family/caregiver did care e.g. Son provided eye drops
Client Completed	Client did own care e.g. Client changed own ostomy appliance
Client Declined	
Equipment Concern	Hoyer broken unable to transfer to provide wound care.
Medication Issue	Incorrect medication /dosing or discrepancy
Medication Regine Completed	e.g. Eye medication regimen completed
Other	
Safety & Health	
Supply Concern	
Wound Healed	

Close

Document Activity

H2 Sponge bath

Not Complete

Reason

Client declined

Done

Caregiver completed
Client completed
Client declined
Equipment Concern
Medication Issue
Medication regime completed

Document activities - Complete

Once the activities have been marked as completed or not completed. Click List.

Green check marks will appear beside each activity that indicates they have been addressed as complete or not complete.

If activities are red, they have been marked as not completed .

Tap complete.
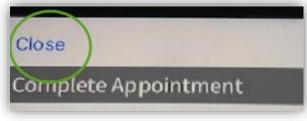
Complete visit

- Once the nursing activity document is completed, the Complete appointment screen appears.

- If ready to complete visit , select complete.
- If not ready to complete, example, if a dated note is to be made, select close.

To get back to Complete Appointment

Select the checkmark/pencil icon the appointment page . Select complete .

The Schedule page will appear. The client visit will now appear as complete.

Select refresh

 Refresh in between each client visit and after each break.

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DSN Workflow if issued Mobile Device

11.0	When leaving client residence, complete the client visit in app.
12.0	Refresh schedule after each visit and after each break.
13.0	Stop and stop all breaks (coffee and meal breaks)

DSN Going on Break (paid/unpaid) / Admin Time
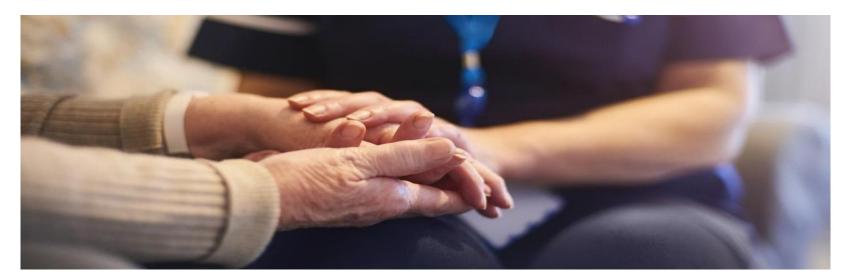
Scheduled (paid/unpaid) breaks and admin time will also show up in DSN

These are treated like a client visit. You will be required to start and stop these attendance types at their scheduled times.

Day in the Life – Training Scenarios

Workflow Process

- Sign into the App.

- Start your attendance type shift code

- Review your client schedule.

  a. Review Appointment Details

    a. Address

    b. Tasks

  b. Review client details

    a. Care Plan, Hazards, Allergies, Client updates, etc.

    b. Past notes

  c. Use the map to find the best route to your client's home

- Travel to first client.

- At client door, start visit.

Try Me! - Begin Your Day

- **Log in to the Procura Mobile application**
- **Using today's date**
  a. Review Client Schedule for the Day
  b. Look for your first visit, and Review Appointment Details
     a. Address
     b. Care plan
     c. Tasks
  c. Review client details
     a. Care Plan, Hazards, Allergies, Client updates, etc.
     b. Past notes
  d. Use the map to find the best route to your client's home

Try Me! – Scenarios

1. You arrive at your first client's door, and it is time to start your visit.
   - Complete screening and first two client identifiers.
   - Document all activities as if they were completed, and complete and close the visits.
   - 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.
2. It's time for a Break!
   - Start and end a scheduled break
3. 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 create a dated note about the client
   - Continue to complete visits and play around in Procura.

Between visits
- ✓ Refresh ⟳ your Schedule
- ✓ Review Appointment Details for the next client
- ✓ Review client details for the next client

Your Work Day is Done!)

- Refresh schedule

- Complete documentation, like notes (DSN)

- Log out of Procura

- Lock or turn off your phone

- Charge your phone for the next day

Procura Employee Portal

Procura portal provides caregivers (DSN/DSS) with access to view their schedule and the client schedule. It is directly connected to the Procura desktop application used by all office staff including Resource Coordinators/Nursing Resource Coordinators and Scheduling Clerks/Nursing Scheduling Clerks.

This employee portal application is used to

✓ View your future and past scheduled visits (2 weeks ahead)

✓ View cancelled and verified appointments

✓ Access client and appointment details when Procura Mobile may not be available

Logging In – Procura Portal

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

OR

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

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

Two Main Screens

Schedules

Availability

Schedules

The **Schedules Tab** shows your schedule for 2 weeks of client visit schedules.
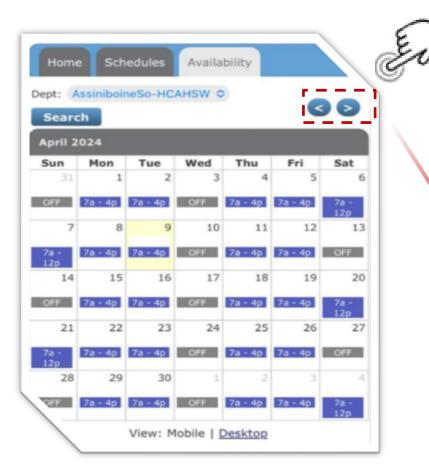
Select a **client name** to see: Visit Information, Client Information, Client Reference Numbers, Contacts, Care Plan, Hazards etc.

Touch the screen and drag up or down to scroll

Availability

The **Availability Tab** will show your availability for each area you work for.

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

Select the arrows to scroll through different months.

Procura Mobile Production – Live Environment
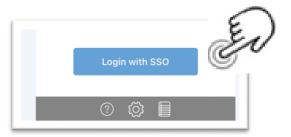
1. Locate the Procura Mobile application on your device

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 **live/production** environment
You will see your schedule and client information and will be notified when you are able to use this
DO NOT PLAY IN THIS APPLICATION

Procura Portal Production – Live Environment

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

Procura

Login with SSO

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

Bell 12:24 PM

PROCURA

3 You will be prompted to change your password
1. Enter your **user name**
2. Temporary Password "**ehcrpass**"

4 After the password is reset you are now able to login

Home

Log On

User Name
Password
Remember me?

Login

5 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/

CARING
FOR HEALTH

Winnipeg Regional   Office régional de la
Health Authority   santé de Winnipeg

Prior to leaving please competed the questionnaire

Option 1

Option 2

1. Locate Safari (web browser)
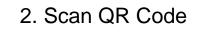
2. Enter the below into the URL

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

1. Locate Camera Application

2. Scan QR Code

CARING FOR HEALTH

Winnipeg Regional Health Authority   Office régional de la santé de Winnipeg

What's Next?

- Go-Live Dates
- Etc..