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 Nurses in all areas (community areas, Community Intravenous, Palliative, Rapid Response, Respite)

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)

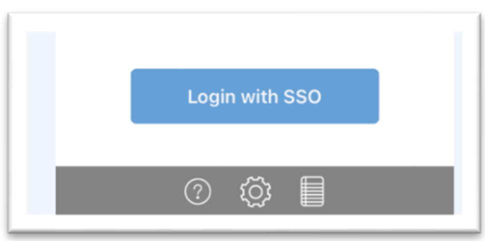


Figure 2 Single Sign on Icon

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
- Duration
- Status

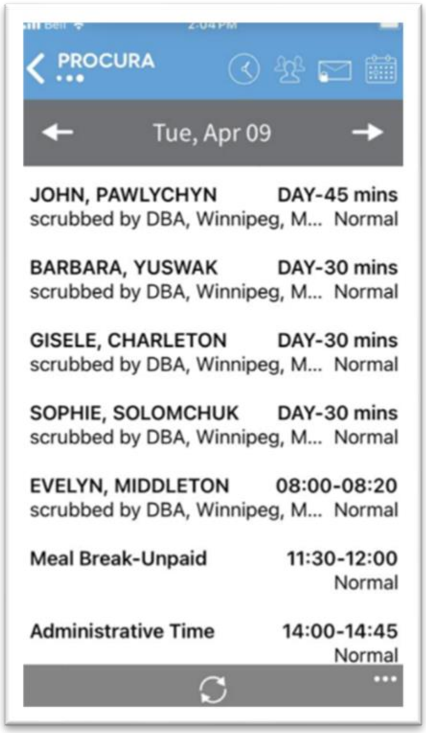


Figure 3 Schedule

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

Step 3. 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.

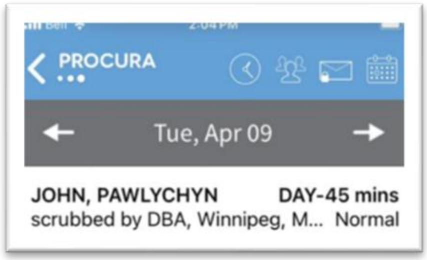


Figure 4 Appointment View

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 3 different purposes:
    i. Displays the care plan tasks required for the visit
    ii. Warns if there are Risks on file
c. 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, date the funding authorization began, case coordinator and contact information.

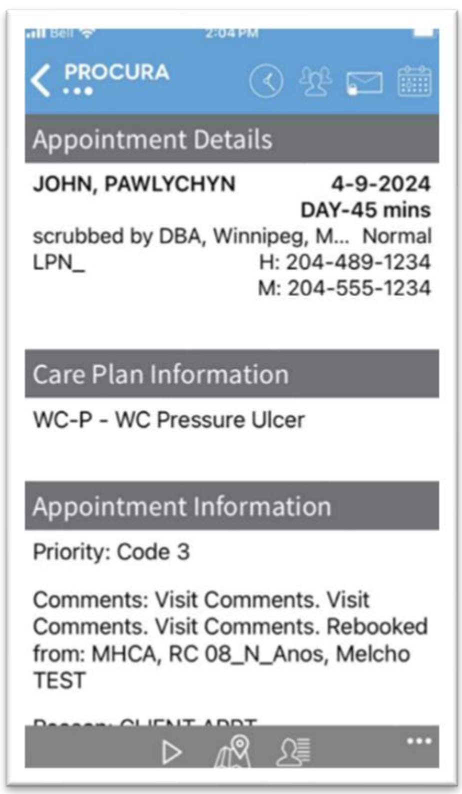


Figure 5 Appointment Details

4. Client Details and Notes

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.

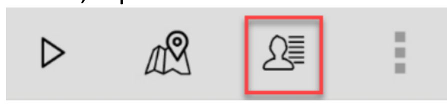


Figure 6 Client Details Icon

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

a. The first two sections contain basic information repeated from the Appointment Details page.
b. Formal Contacts are professional Contacts(Physicians, Pharmacy, Power of Attorney)
c. Informal Contacts and Addresses are contacts that are non professionals (friends, family, etc.) and Client addresses.
d. Allergies includes name, degree (allergy or sensitivity) and type (physical, food, medications)
e. Equipment- any equipment in the home/Languages/Likes/Dislikes
f. Diagnoses a list of current patient diagnoses, including Infectious Diseases and required precautions
g. Hazards refer to risks and will refer to the existance of a Safe Visit Plan.

Figure 7 Client Details

Step 3. To view past notes for a client, select the Ellipsis Menu then select View Note.

Figure 9 Ellipsis Icon

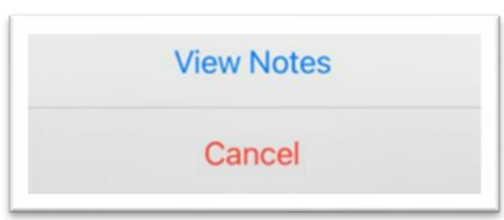


Figure 8 View Notes Icon

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.

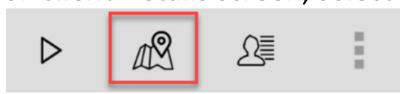


Figure 10 Map Icon

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

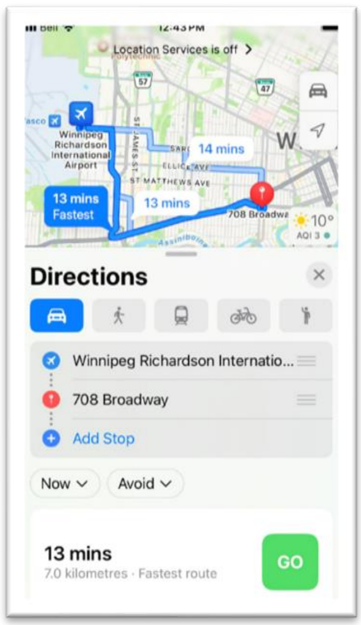


Figure 11 Apple Maps

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

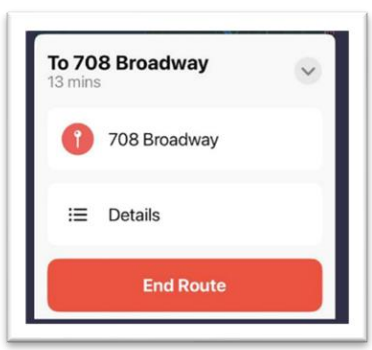


Figure 12 End Route

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

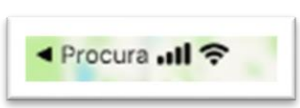


Figure 13 Exit Procura Mobile

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.

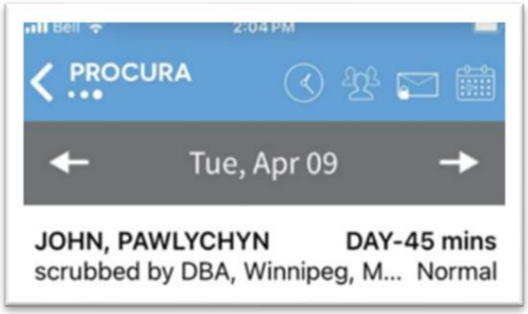


Figure 14 Client Visit

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

Step 3. Select Start.

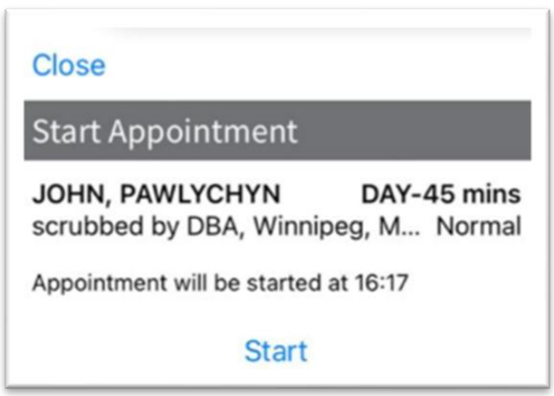


Figure 15 Starting a Visit

7. Client Identity Verification

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

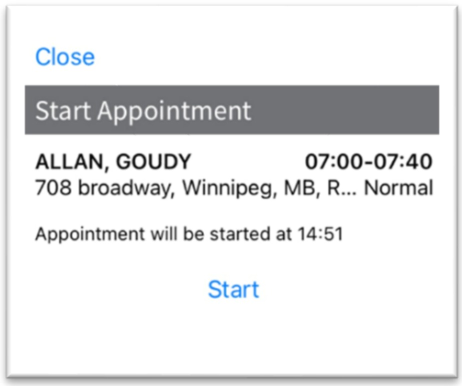


Figure 16 Starting a Visit

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

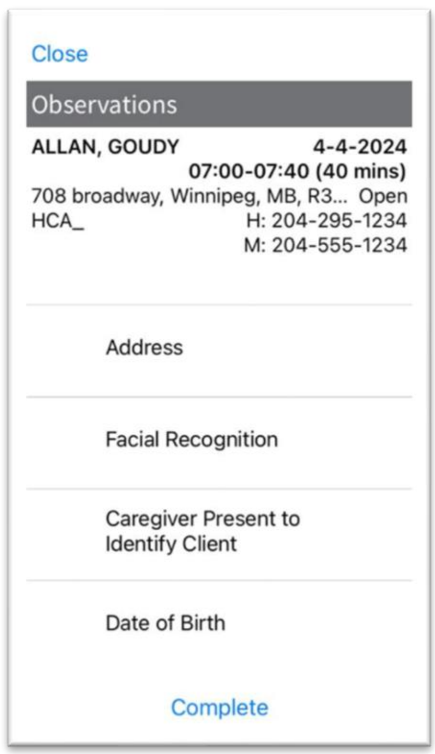


Figure 17 Client Identifiers

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

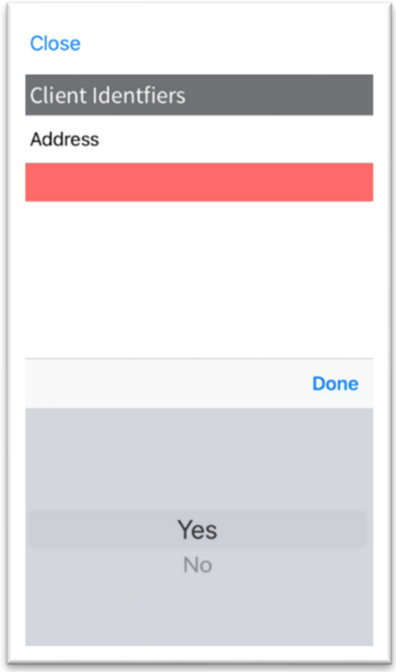


Figure 18 Documenting Client Identifiers

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.

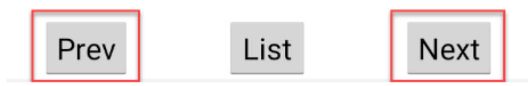


Figure 19 Previous and Next Button

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

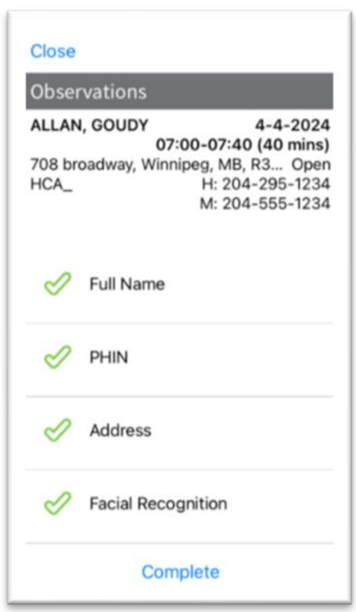


Figure 20 Client Identifiers Completed

8. 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.

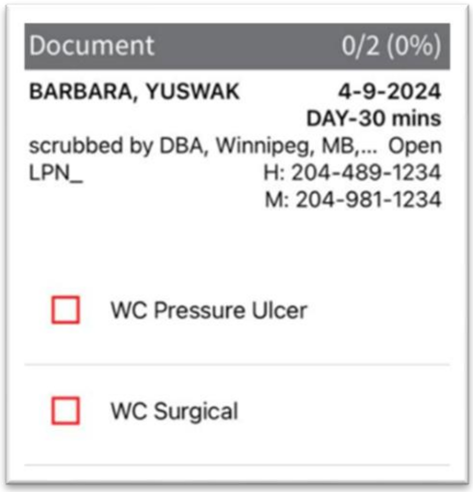


Figure 21 Document Screen

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

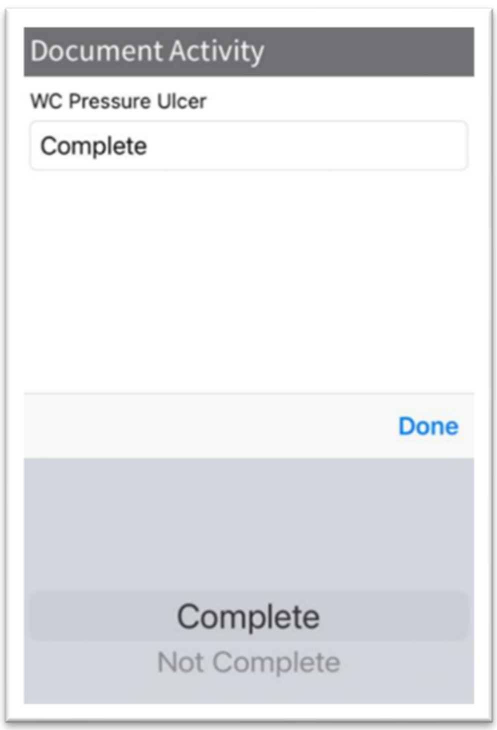
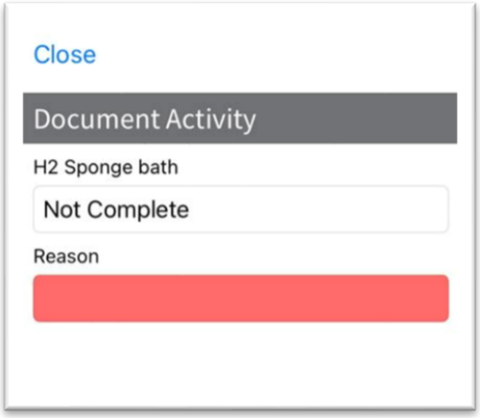


Figure 22 Documenting Tasks

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



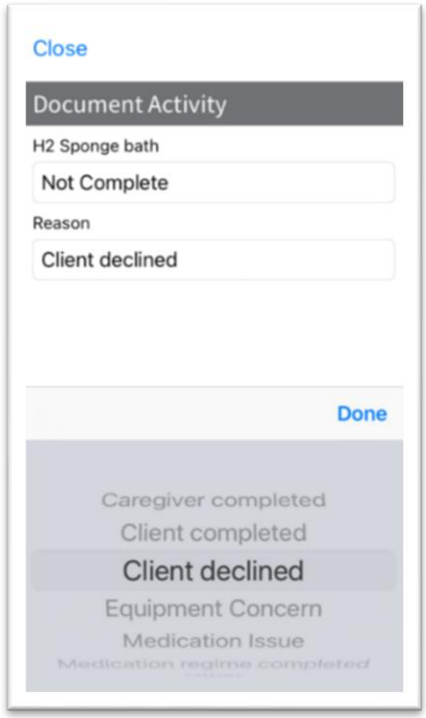


Figure 23 Documenting Tasks with Reason Codes

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.

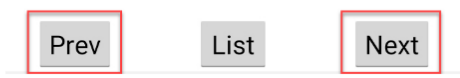


Figure 24 Navigation Icons

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

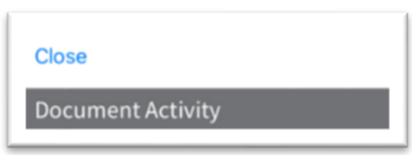


Figure 25 Closing the Document Details Screen

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

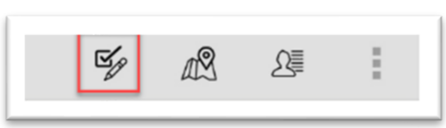


Figure 26 Complete Documentation

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

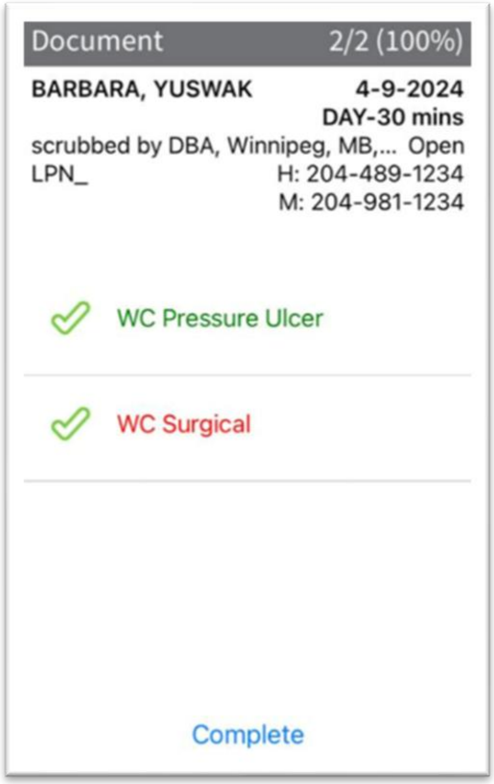


Figure 27 Completed and Not Completed Task View

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.

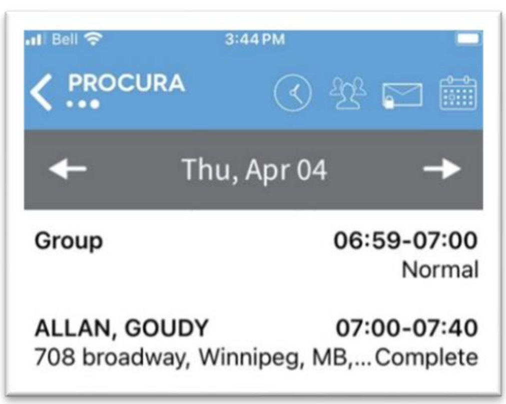


Figure 28 Completed Visit View

9. Create a Note

Notes are used to document client observations not captured in the Care Plan. These notes are saved to the client file and can be seen by the back office. Creating a note is an optional activity that should be completed before finalizing or completing the client visit.

Step 1. The note icon will appear from the Appointment Details screen and in the Client Details screen

Figure 29 Note Icons

Step 2. Select Create Note

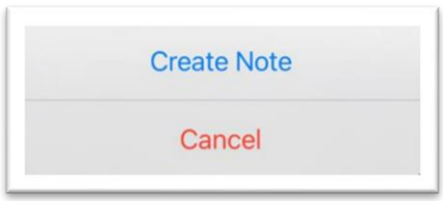


Figure 30 Creating a Note

Step 3. The Create Note Screen appears. From here you are able to enter the note details

a. Note Type
b. Subject
c. Contents

Step 4. Select into the red highlighted field to select a reason to write in each section.

Figure 31 Creating a Dated Note

Step 5. Select Save when your note is completed. This note is now visible to other Home Care staff when they access View Notes from Client Details.

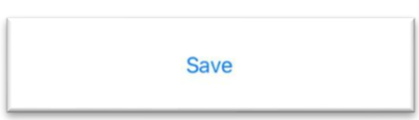


Figure 32 Save Icon

10.Viewing Notes and Follow up

Step 1. Select the Ellipses from the Client Details screen.

Figure 33 Ellipses from Client Details

Step 2. Select View Notes

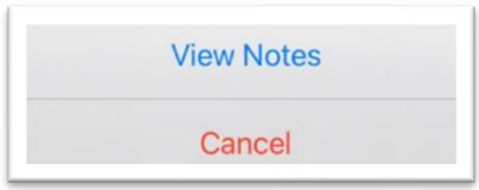


Figure 34 View Notes Tab

Step 3. The list of notes for 30 days will appear. Select each of the notes to review in more detial

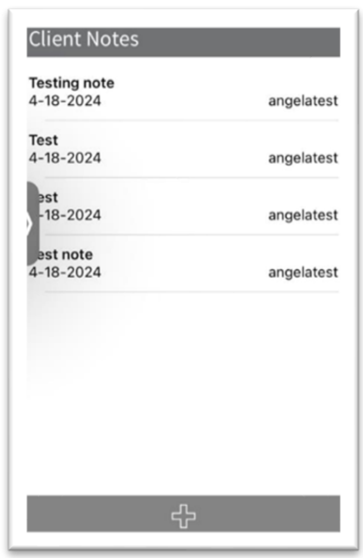


Figure 35 Notes for last 30 days view

Step 4. From the Client Note Detials screen you are able to review the notes and add follow-up information to a note. Select the note icon to add in follow up details to a specific note.

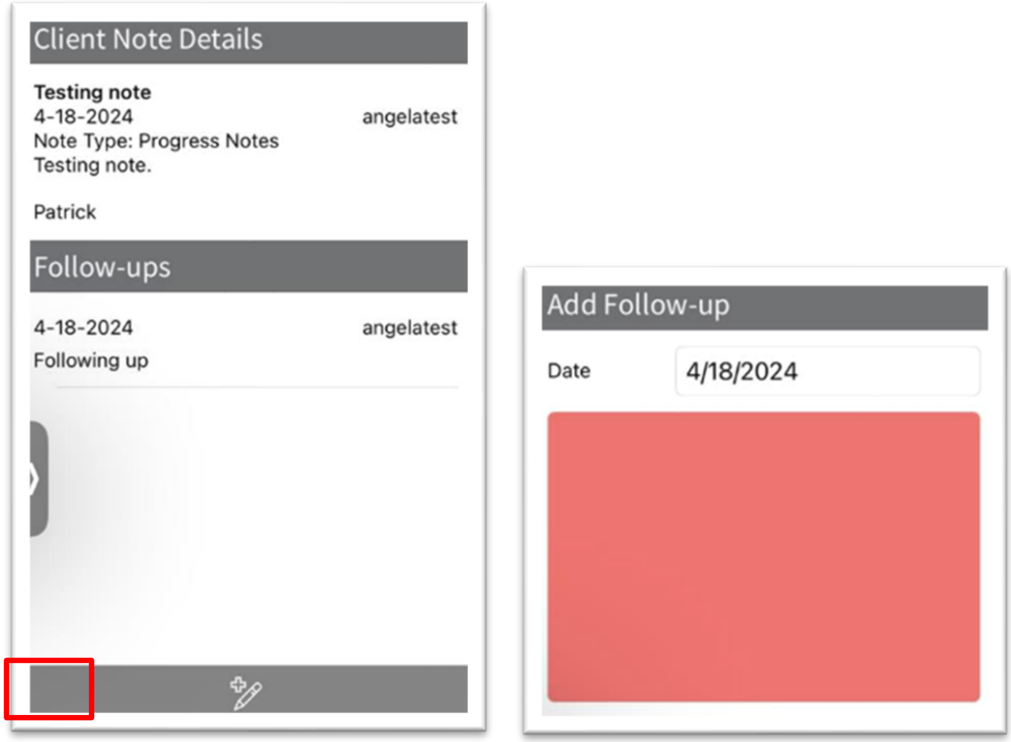
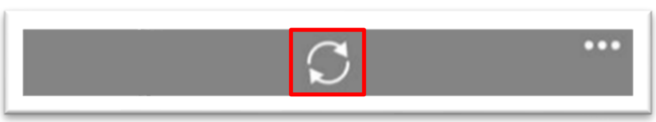


Figure 36 Adding follow up information

11. Refresh or Log out of Procura Mobile

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



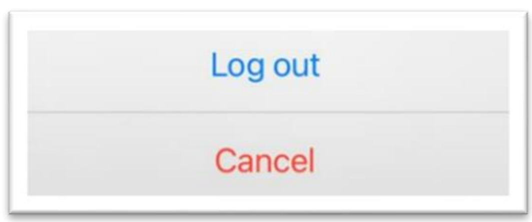


Figure 37 Refresh and Log Out

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

Figure 38 Log Out