

PointClickCare®



Home Care Document Management with Forcura

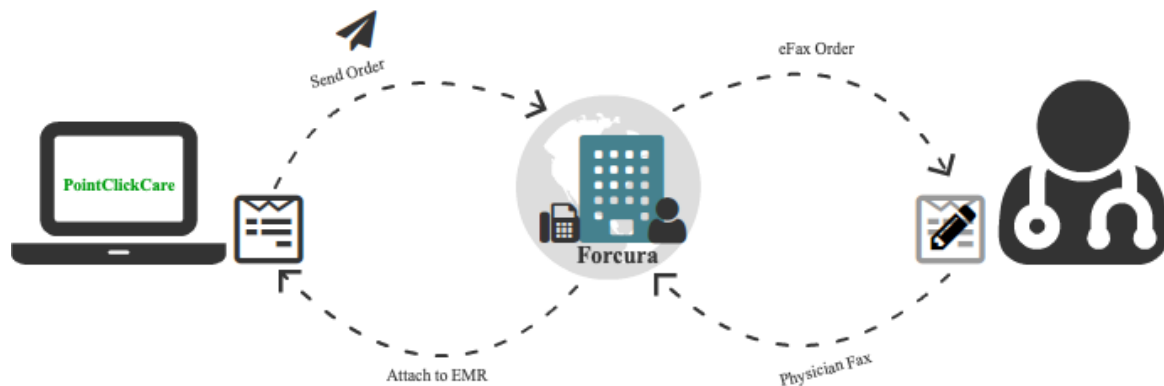
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Overview

Home Care’s Document Tracking system uses Forcura as a management service.

1. When the agency electronically sends an order to a physician, the order is sent to Forcura.
2. Forcura applies a bar code, creates a case, and sends a fax of the order to the physician.
3. The physician signs the order and faxes it back to Forcura.
4. Forcura maintains a copy of the order permanently and notifies the agency it is signed.
5. The agency reviews the signed order in Forcura and changes the order status to **Attach to EMR**. This electronically attaches a copy of the order to the patient record in Home Care and updates the order status to **Signed**.



Tip: Orders don’t actually upload to Home Health Care from Forcura. Instead, when clicking on an order to view in Home Health Care, the program shows the most recent version of that Order in Forcura. Think of this as showing a “live” view of that Order in Forcura.

Setting Up Users to Access Forcura

To access Forcura, users must have an email address in their employee profile, and the employee profile must be linked to a Security User Account (part of normal user setup).

Sending Orders to Forcura from Home Care

When the Send Electronically option is selected in an order, it is automatically sent to Forcura when the status is changed to Sent. (Note that when Document Tracking is enabled, Send Electronically is activated by default.)

Procedure

1. During Intake, ensure the primary physician has a fax number and has FAX selected as the Preferred Order Delivery method. Contact your system administrator if you need to edit the physician.

The screenshot shows the 'Add Physician' form with the following data:

- Name ***: A'BODJEDI, ENENGE, Middle Name
- NPI***: 1952310666
- Address**: ONE HOSPITAL PLAZA, Address 2, STAMFORD, CT, 06904-9317
- Phone**: (203)276-7111
- Fax**: (203)276-7081
- Pecos**:
- Business Name**: Business Name
- Specialty**: Specialty
- Preferred Order Delivery**: FAX

2. Monitor the **Ready to Send** dashboard tile daily. When an order appears on the tile, click to view the dashboard. (Contact your system administrator if you do not have access to this dashboard.)
3. Click **View** to open an order.
4. Click in the **Status** field and select **Sent**, and check that the order is marked **Send Electronically**.
5. Select **Save and Close**. The document is automatically sent to Forcura.

Monitor the **Document Tracking** dashboard to verify your document was successfully received by Forcura. [See](#)



PointClickCare

Dashboard Intakes Clients Employees Schedule - Agency - Reports Administration -

Document Tracking

Orders sent in the last 30 days

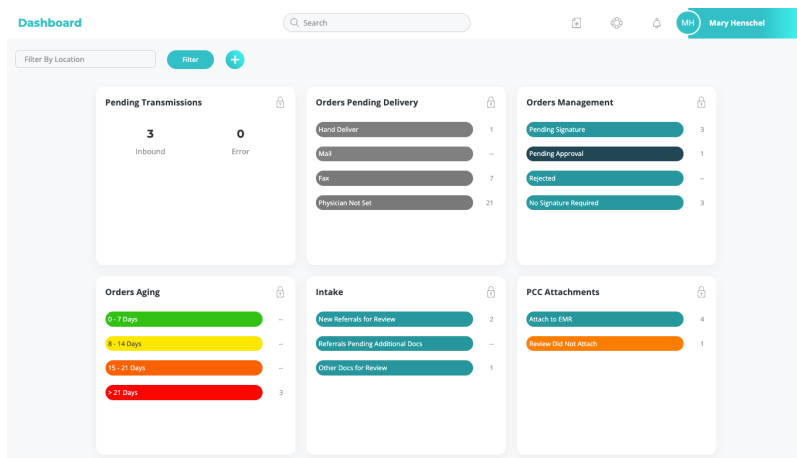
Tracking Status	Upload Attempts	Branch	Patient Name	Order Type	Order	Cert Period
FAILED_FAX	1	Godard Heights Branch	Jake, Jordan	Plan Of Care(SOC)	07/25/2019	07/25/2019 - 09/22/2019
FAILED_FAX	1	Godard Heights Branch	Jake, Jordan	Plan Of Care(SOC)	07/25/2019	07/25/2019 - 09/22/2019
SIGNED	1	Godard Heights Branch	Jake, Jordan	Supplemental Generic	09/13/2019	08/11/2019 - 10/09/2019

Tip: The Document Tracking dashboard provides a quick look into your document's Forcura status without leaving Home Care. Use it to monitor your document's progress at any time. See Order Tracking Statuses.

6. Fax Transmission Troubleshooting Guide if your document Tracking Status is Failed Fax.

Accessing Forcura from Home Care

To access Forcura from Home Care, go to **Agency>Doc Tracking**. The Forcura Dashboard appears.



Not all Forcura functions are required for orders management and are not covered in this guide. This includes the following:

- Intake
- Drive
- Secure Document Delivery
- Cases
- Directories

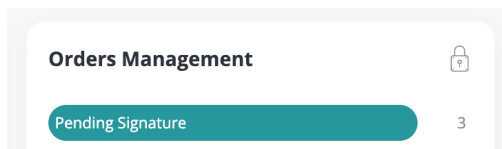
Managing Faxed Orders in Forcura

Procedure

1. When an order enters Forcura, a unique bar code is assigned to the document, and the document appears in the **Pending Signature** dashboard. Monitor the **Pending Signature** dashboard to verify the fax is sent to the physician.



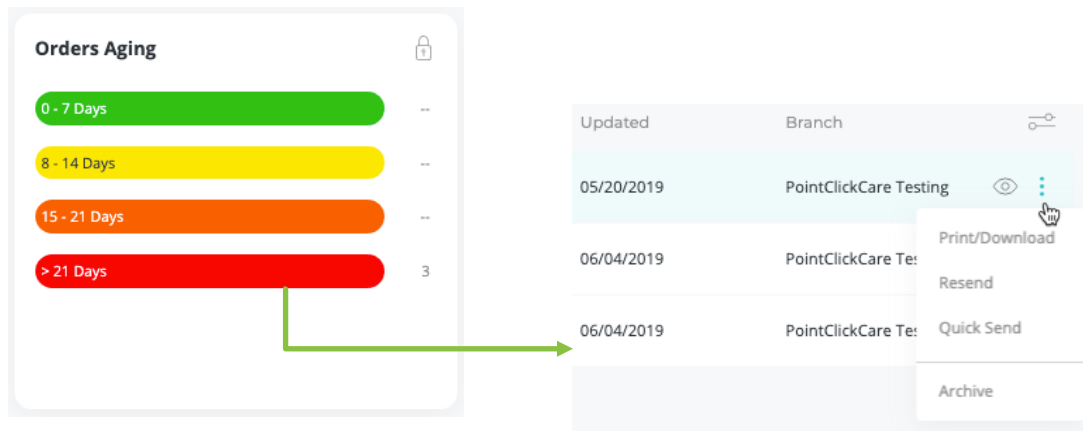
2. When the order is sent to the physician, the order appears in the **Pending Signature** section of the **Orders Management** dashboard. Click **Pending Signature** to view a list of orders sent to physicians for signature.



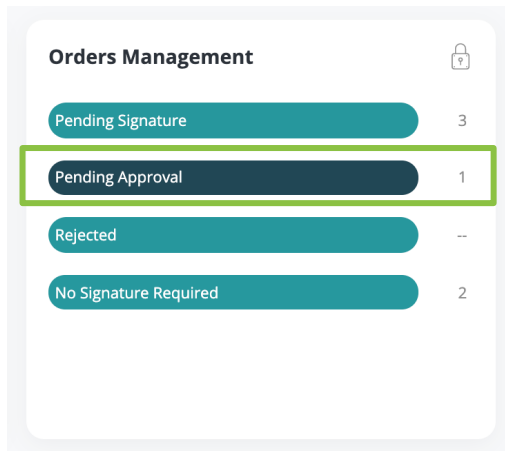
3. Monitor the **Orders Aging** dashboard for orders that are not being returned from the physician in a timely manner.
 - a. Click into a section, for example, 8-14 days, to view aging orders.



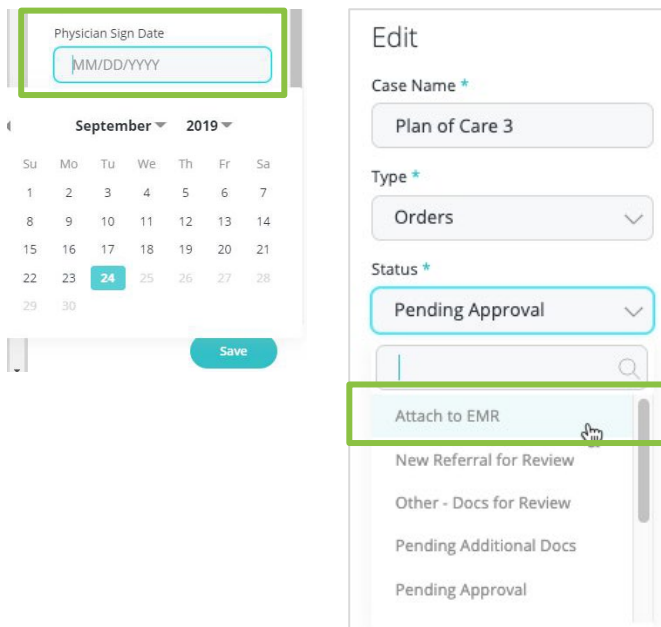
- c. Click the  icon (three dots) to Print/Download, Resend, or Archive the document.



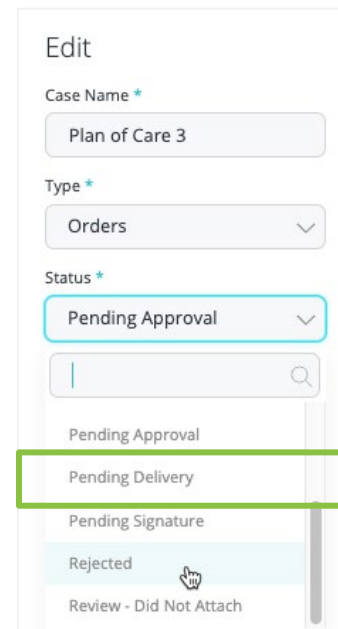
- Once the order is returned from the physician, the barcode will automatically link the document to the existing case, the system sets the status of the case to **Pending Approval**, and the document appears in the **Pending Approval** section of the **Orders Management** dashboard.



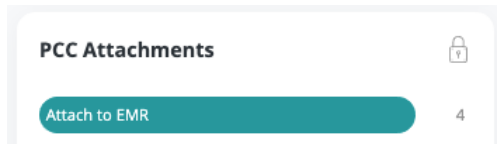
If the signature is in place, verify that a signed date has been added and add the date if necessary. Click in the Status field and select **Attach to EMR**.



If the physician rejected the document, click in the Status field and select **Rejected**. The Home Care chart is updated to **Rejected**, and the case is archived.



- Until the document link is attached to Home Care, the order appears in the **Attach to EMR** section of **PCC Attachments**.



- When the document is successfully attached, a link to the signed document stored in Forcura appears in the Patient’s record. (See [Order Tracking Statuses](#) for information on messages displayed in the Patient’s chart.) Click the link to view the order.
- When the document transmission cycle is complete, the document is automatically archived.

Order Date	Certification Period	Signing Physician	Additional Physicians	Order	Tracking Status
08/19/2019	08/04/2019 - 10/31/2019	ABARBANEL, DAVID			✓ Sent (Not Faxed)
08/19/2019	08/04/2019 - 10/31/2019	ABARBANEL, DAVID			✓ Signed

Department of Health and Human Services
Centers for Medicare & Medicaid Services

Form Approved
OMB No. 0938-0367

HOME HEALTH CERTIFICATION AND PLAN OF CARE


1. Patient's HI Claim No. 12345678	2. Start Of Care Date 06/05/2019	3. Certification Period 08/04/2019	10/31/2019	4. Medical Record No. 0000852	5. Provider No. 247250
6. Patient's Name and Address Wolfe, George 111 Main Street Saint Paul, MN 55116			7. Provider's Name, Address and Telephone Number A Caring Heart Home Health-Test 2140 Hollowbrook Dr #200 Colorado Springs, CO 73434-4934 Phone: (719)505-1010 Fax: (719)505-1010		
8. Date of Birth 06/02/1965	9. Sex M	10. Medications: Dose/Frequency/Route (N)ew (C)hanged			
11. ICD-10-CM Principal Diagnosis		Date			

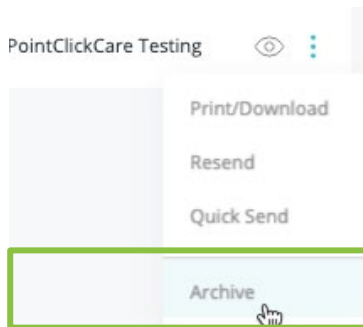
Note: Orders that are placed in the Attach to EMR status will auto-archive only once. However, the most recent version of an Order is always available in the Home Health Care program, even if an Order is not placed in Attach to EMR status. This means that if a user places an order into Attach to EMR status more than once, the document will not auto archive, however the most recent version will be visible in Home Health Care.

Managing Documents that Do Not Require a Signature

Some documents do not require a signature from a physician. An example of this is copies of documents sent to non-primary **physicians**. **Manage these documents from the No Signature Required section of the Orders Management dashboard**. You must manually archive these transmissions.

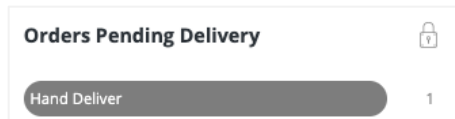
Procedure

1. Click the **No Signature Required** section of the **Orders Management** dashboard to view orders.
2. Click the  icon (three dots) and select **Archive**.




Managing Hand Delivered Orders

Occasionally physicians prefer to have orders hand delivered. These orders will appear in the **Hand Delivery** section of the **Orders Pending Delivery** dashboard.



Procedure

1. Click in **the Hand Deliver** section to access the order.
2. Click the  icon (actions) and select **Print/Download**.
3. Change the status to **Pending Signature** (to move it out of Pending Delivery)
4. Print the order with a bar code from Forcura and deliver it to the physician.
5. Physician signs the order and faxes it back to the agency. When this happens, the order is uploaded into Forcura with the barcode maps to the appropriate order reference.
6. The order appears in the **Pending Approval** section of the **Orders Management** dashboard. Review the order and update the status of order to **Attach to EMR**.
7. The order appears in the client's record in Home Care and is archived in Forcura.

Following Up on Orders Aging

Orders Aging lists orders sent to physicians according to days outstanding. Monitor this dashboard to identify orders that require follow up. Click a section to view the orders.

Order Name	Date	Patient Name
Notification Order	02/13/2019	Doe, John T
Order 5	02/13/2019	Madison, James
Plan of Care	02/13/2019	Madison, James

To resend a single order



To resend multiple orders



3 selected

	Name	Type	Status	Patient
<input checked="" type="checkbox"/>	Notification Order	Orders - No Response ...	Pending Signature	Doe, John T
<input checked="" type="checkbox"/>	Order 5	Orders	Pending Signature	Madison, James
<input checked="" type="checkbox"/>	Plan of Care	Orders	Pending Signature	Madison, James

Inbound Faxes Not from Home Care

Your agency may receive faxes that do not originate from Home Care. These appear in the **Inbound** section of the **Pending Transmissions** dashboard.

The screenshot shows the 'Pending Transmissions' dashboard. At the top, there are icons for visibility and a menu. Below is a summary card with the following data:

Category	Count
Inbound	3
Error	0

Below the summary card is a table of pending transmissions:

Checkmark	Name	Source	Type	Date	Date	Actions
<input type="checkbox"/>	Charlie Flynn	PointClickCare Fax Line 1	(1 page) Inbound Fax	05/09/2019	05/09/2019	Download, Quick Send, Save To Drive, Archive, Archive To Patient
<input type="checkbox"/>	Charlie Flynn	PointClickCare Fax Line 1	(1 page) Inbound Fax	05/09/2019	05/09/2019	Download, Quick Send, Save To Drive, Archive, Archive To Patient
<input type="checkbox"/>	Charlie Flynn	PointClickCare Fax Line 1	(1 page) Inbound Fax	05/09/2019	05/09/2019	Download, Quick Send, Save To Drive, Archive, Archive To Patient

View Order History

At times you may need to view the history of an order.

Procedure



- At the top of the detail pane, click the icon (clock). This accesses a list of all document activities.

The screenshot shows the document activity history pane with a navigation bar at the top containing icons for edit, clock, and print. The activity list is as follows:


- Combine**
 - PCC Master Dashboard (PM) - May, 20 1:53 PM
- Attach**
 - PCC Master Dashboard (PM) - May, 20 1:52 PM
- Print/Download**
 - Test User (TU) - May, 20 8:34 AM

View Audit Information

At times you may need to view audit information for an order.

Procedure



2. At the top of the detail pane, click the  icon (list). This accesses a record of every person and activity associated with the document.

The screenshot shows a vertical list of audit entries. At the top, there is a navigation bar with three icons: a pencil, a clock, and a list icon (which is highlighted). Below the navigation bar, there are six entries, each in a rounded rectangular box with a dropdown arrow on the right. The first five entries are labeled 'Read' and the last one is labeled 'Download'. Each entry includes a user icon (a circle with initials), the user name, and a timestamp.

Activity	User	Timestamp
Read	Bettina Abrams (BA)	Jun. 03 2:03:54 PM
Read	Test User (TU)	May. 24 10:55:38 AM
Read	PCC Master Dashboard (PM)	May. 20 1:53:41 PM
Read	PCC Master Dashboard (PM)	May. 20 1:52:59 PM
Read	PCC Master Dashboard (PM)	May. 20 1:52:15 PM
Download	Test User (TU)	May. 20 8:34:04 AM

Order Tracking Statuses

Documents are given the following tracking statuses within Home Care. Tracking Status is updated in PointClickCare for an Order when placed in the Attach to EMR status.

Tracking Status on Document Tracking Dashboard	Display on Patient Order List	Indicator	Description
No Record	N/A	N/A	The order has not been queued for transmission.
PENDING_UPLOAD	Pending Upload	N/A	The order is queued for upload to Forcura within the order tracking job table.
PENDING_FAX	Pending Fax	N/A	The order was successfully uploaded into Forcura and is now queued for fax transmission.
SENT	Sent	Green Checkmark	The order has been successfully sent and uploaded into Forcura
SENT_NO_FAX	Sent (Not Faxed)	Green Checkmark	The physician's preferred delivery method is set to something other than Fax. The order was still transmitted to Forcura but it was NOT faxed.
SENT_NO_FAX_GROUP	Sent (Not Faxed - Branch Setup)	Red Circle	The order has been sent to Forcura and a case has been created but the fax transmission was unsuccessful due to no fax group listed on the branch associated to the patient's case record
SIGNED	Signed	Green Checkmark	The order has been signed by the physician and sent back to PCC.
REJECTED	Rejected	Green Checkmark	The order has been rejected by the physician and sent back to PCC.
FAILED_UPLOAD	Failed Upload	Red Circle	The order failed to upload into Forcura.
FAILED_FAX	Failed Fax	Red Circle	The order successful uploaded into Forcura but failed to automatically fax.

Troubleshooting

Managing Orders in Physician Not Set

When a fax transmission ends up in the Physician Not Set section of the Orders Pending Delivery dashboard, it is often because the delivery method in Home Care isn't set for that physician.

You will need to:

1. Update the physician contact information in Home Care
2. Update the Delivery Type and Fax Number in Forcura
3. Resend the fax from the Case History in Forcura

Update physician contact information in Home Care

1. Go to **Admin > Physicians** and select **Edit** for the physician.

2. On the **Demographics** tab, select Fax for **Preferred Order Delivery** and check that the fax number is correct.

Update Delivery Type and Fax number for Physician in Forcura

1. Navigate to Forcura.



3. Select Fax for the Delivery Type and enter a Fax number for the physician.

The screenshot shows the 'Directories' section in Forcura with 13 results. A table lists physician details including Name, NPI, External R., City, Directory T., Delivery Ty., Created, and Last U. The 'Delivery Ty.' column for the physician 'WA, CHRIS...' is highlighted with a red box and set to 'None'. To the right, a form allows updating contact information for 'United States'. The 'Fax' field is highlighted with a red box and contains the value '(123) 555-5555'. A 'Save' button is also highlighted with a red box at the bottom right of the form.

Name	NPI	External R.	City	Directory T.	Delivery Ty.	Created	Last U.
BERGMAN, ...	1437178811	391018	MINNEAPO...	Physician	Fax	08/20/2019	08/20/2019
JOHNSON, ...	1285696567	1253258	COON RAP...	Physician	None	08/07/2019	08/07/2019
HOILAND, ...	1487605655	259593	MINNEAPO...	Physician	None	06/26/2019	06/26/2019
WA, CHRIS...	1073908976	1220101	ROYAL OAK	Physician	Fax	06/26/2019	06/26/2019
AAKRE, CH...	1508151663	1000256	ROCHESTER	Physician	None	06/20/2019	06/20/2019
ABARBANE...	1598298242	1147415	ROCHESTER	Physician	None	06/05/2019	06/05/2019
FERRARA, ...	1154332195	438625	INVER GRO...	Physician	Fax	06/04/2019	06/04/2019

4. Click **Save**.

Resend the order from Forcura

After updating physician contact information in Home Care and Forcura, you need to resend the order from the Case Activity History. Make sure you're resending from the Created activity (see below). Resending from the Cases list or Transmissions list will not resend the fax. Follow this process in Forcura for any cases where the physician directory method (or contact information) have been updated in PCC.



2. For the order that you want to resend:



Joining Multiple Faxes Containing Parts of the Same Order

At times, a user might fax an order multiple times, but each fax might include a different part of the order. The most recent version of an Order in Forcura is what appears in Home Health Care. This is because Home Health Care does not get an actual attachment, but simply shows what is currently stored in Forcura for that Order. When this happens, open the Activity section in the Case panel and combine the multiple versions of the Order. After this procedure, all versions are combined and displayed as the most recent version in Home Health Care.

Documents Stuck in Attach to EMR

Documents may become stuck in Attach to EMR for any of the following reasons.

- Incorrect patient is assigned
- Document type other than Orders
- Physician Sign Date is missing
- Order Number is missing or incorrect
- Order was already attached/synced with PointClickCare (cannot be retriggered and must be manually updated in PointClickCare)
- Order was updated manually within PointClickCare prior to updating status to Attach to EMR

Fax Transmission Troubleshooting Guide

This section outlines what to do in the event of a failed transmission.

Keep in mind that the fax service utilized by Forcura will make several attempts to send a document before an error is reported. While a successful fax transmission relies on several factors on both the sender and recipient's end, there may be adjustments we can make to prevent these failed transmissions moving forward.

Exception	Explanation	Suggestion
Invalid Number	The recipient's number cannot be dialed. There could be a missing digit (i.e., 9 digits of a 10-digit number) or transposed digits that make the number invalid (i.e. a non-existent country or area code).	Double-check the number with the recipient and verify that you are including the necessary area code.
Restricted Number	The recipient's number is valid but restricted.	Double-check the number with the recipient.
Unreachable Number	The recipient's number is thought to be valid, but the network is rejecting the call. This is usually a wrong number.	Double-check the number with the recipient.
No Answer	The called number is ringing but does not answer after 60 seconds (approx. 10 rings). This could be a wrong number, but it is likely that the receiving equipment is disconnected.	Verify that the recipient's number is correct and resend.
Line Busy	The called number is valid but is returning a busy signal.	Contact the recipient and verify that their equipment is ready to receive your fax and resend.
Network Busy	The network is unable to complete the call. This could be a wrong number.	Double-check the number with the recipient. Once verified, resend after a short wait.
No Carrier	The call was connected and answered, but there was no modem carrier tone. This could be a wrong number.	Double-check the number with the recipient.
Not Fax	Whatever answered did not behave like a fax machine or server.	Double-check the number with the recipient. If you have confirmed the number and still get this error, please report it to Forcura.

<p>Protocol Error</p>	<p>Our fax service was not able to find a suitable speed and protocol that would work with the line conditions observed on this call.</p>	<p>Try resending. If you see this error frequently to a particular number, please report it to Forcura.</p>
<p>Call ended unexpectedly</p>	<p>This can happen at any point in the transmission and some or all of the fax may have been delivered.</p>	<p>Contact the recipient to see what they received. If you see this error frequently when sending to a particular number, please report it to Forcura.</p>
<p>Other</p>	<p>Less common exceptions will sometimes occur and need to be handled in different ways.</p>	<p>Try resending and report to Forcura.</p>