PointClickCare®

Home Care
Document Management with Forcura

Table of Contents

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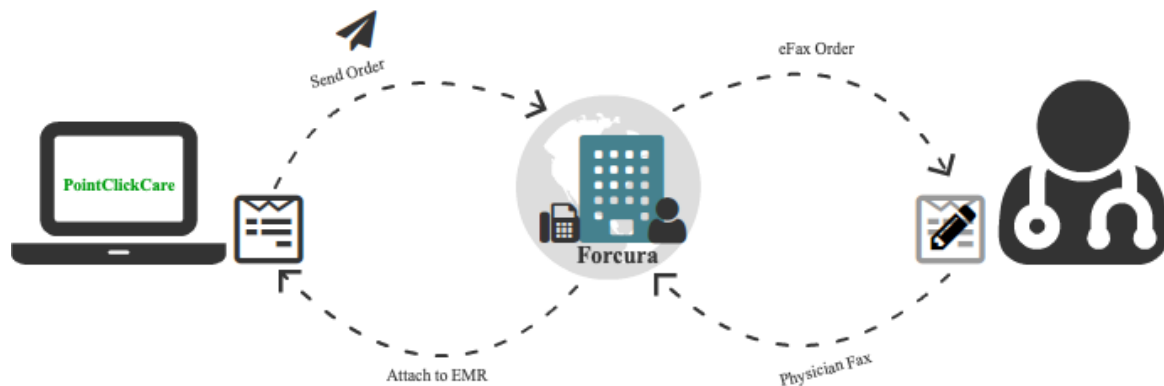
Tip: Orders don't actually upload to Home Health Care from Forcura. Instead, when clicking on an order to view in Home Health Care, the program shows the most recent version of that Order in Forcura. Think of this as showing a "live" view of that Order in Forcura.

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.

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

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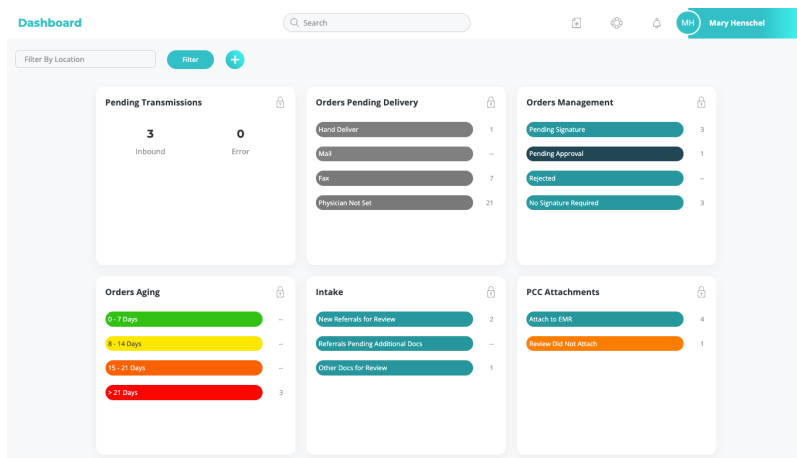
Not all Forcura functions are required for orders management and are not covered in this guide. This includes the following:

- 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.
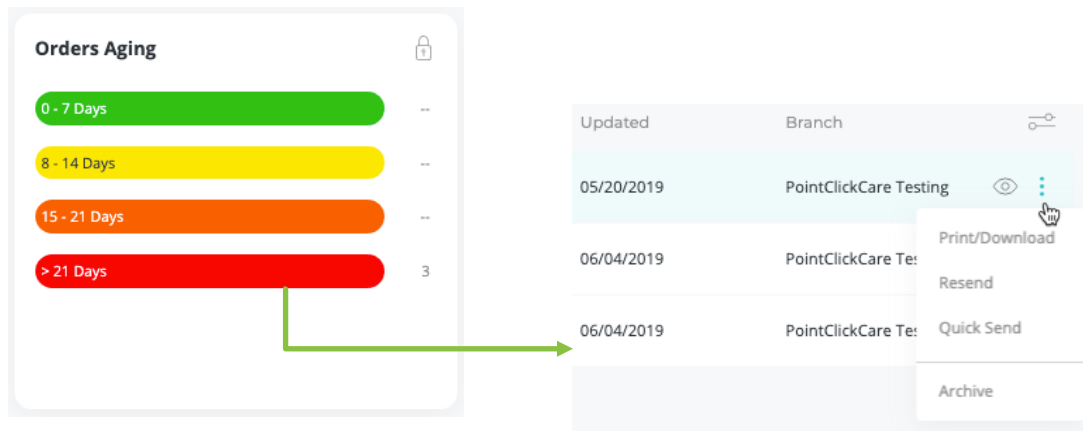

2. When the order is sent to the physician, the order appears in the **Pending Signature** section of the **Orders Management** dashboard. Click **Pending Signature** to view a list of orders sent to physicians for signature.
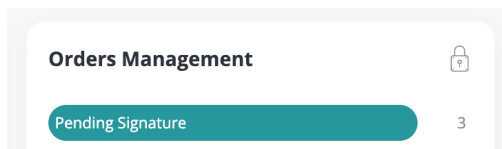

3. Monitor the **Orders Aging** dashboard for orders that are not being returned from the physician in a timely manner.

   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.

4. 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.
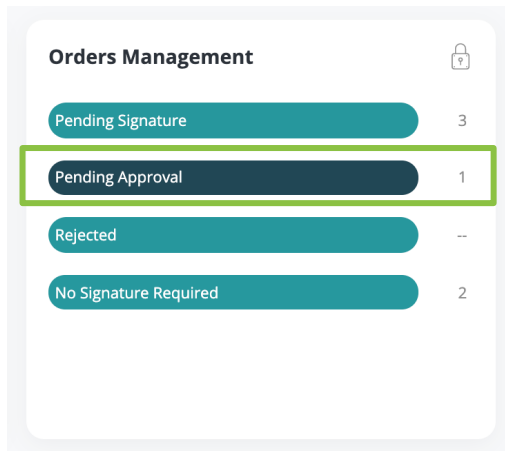
If the signature is in place, verify that a signed date has been added and add the date if necessary. Click in the Status field and select **Attach to EMR**.
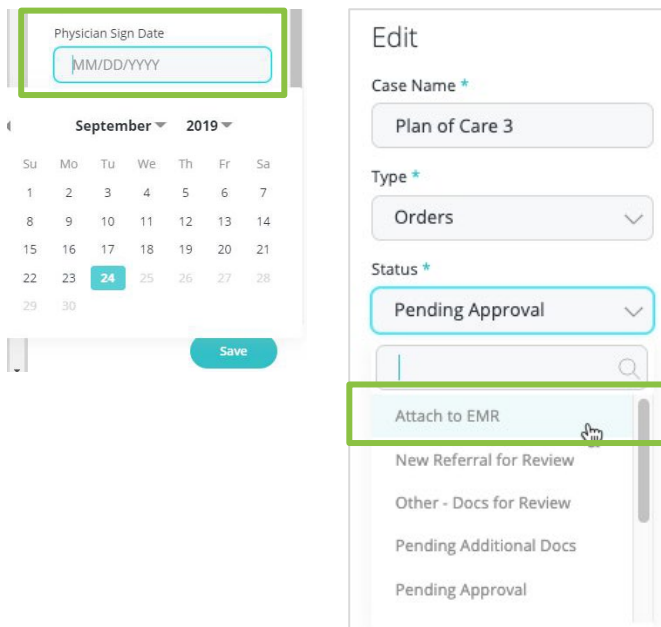
If the physician rejected the document, click in the Status field and select **Rejected**. The Home Care chart is updated to **Rejected**, and the case is archived.
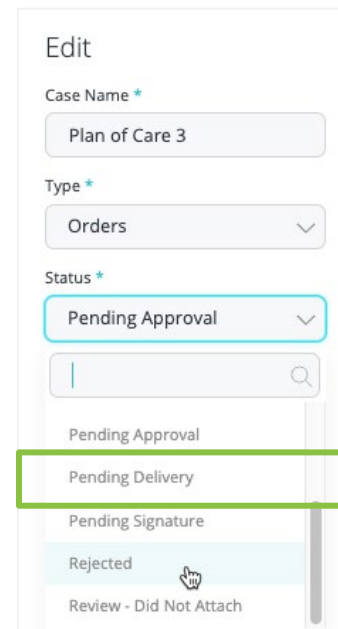
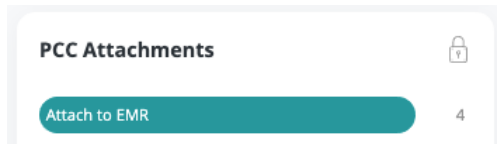6. Until the document link is attached to Home Care, the order appears in the **Attach to EMR** section of **PCC Attachments**.

7. 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.

8. When the document transmission cycle is complete, the document is automatically archived.

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.
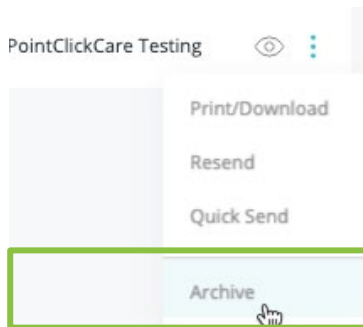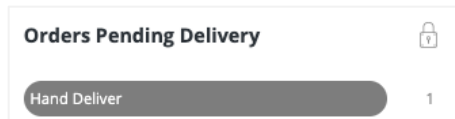
Procedure

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.

To resend a single order

To resend multiple orders

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.

View Order History

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

Procedure

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

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.

Read ⌄
BA **Bettina Abrams**   🗓 Jun. 03 2:03:54 PM

Read ⌄
TU **Test User**   🗓 May. 24 10:55:38 AM

Read ⌄
PM **PCC Master Dashboard**   🗓 May. 20 1:53:41 PM

Read ⌄
PM **PCC Master Dashboard**   🗓 May. 20 1:52:59 PM

Read ⌄
PM **PCC Master Dashboard**   🗓 May. 20 1:52:15 PM

Download ⌄
TU **Test User**   🗓 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.

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.

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