Procura
Clinical Care module

Key User and
Basic Troubleshooting
Manual

Approval

Ver	Approval Date	Reviewer	Approver	Comments
1	13/5/11	Gwen Whenan Victoria Henstridge	Meg Phythian Director Care Governance	New document

Modification history

Ver	Approval Date	Modified by	Approver	Comments
1.1	01/08/11	Victoria Henstridge	Gwen Whenan	Inclusion of suspended assessments
1.2		Victoria Henstridge Gwen Whenan		Include information for Key Users
1.3	June 2015	Nicky Rowan		Reorganise sections, general update, add key user training hints

Table of Contents

1 New user setup by key user

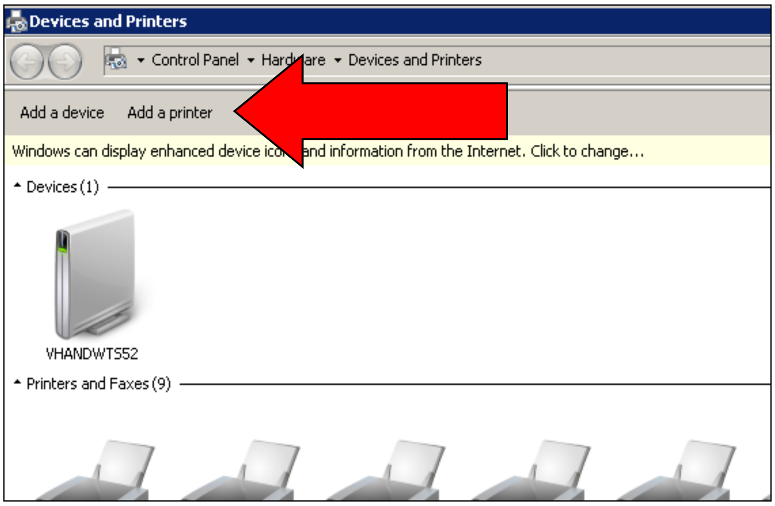
When a new user starts at the site, a key user must do some set up in the new user's account to enable easy access to Procura.

1.1 New user log on to the Helping Hand network.

- Ask the new user to log onto the Helping Hand network. Once logged on, the new user must stay with the key user while the key user does their setup work.
- If the new user does not have their user name and password, check that a request was sent to the helpdesk to get them set up.

1.2 Add a printer for the user's work area.

- Click on 'Start' then 'Devices and Printers'.
- Click on 'Add a printer'. (For RN or more senior, a colour printer is also required.)



- Select 'Add a network, wireless or Bluetooth printer'.
- Click on 'The printer that I want isn't listed'.
- Select 'Find a printer in the directory based on location or feature' then click 'Next'.
- Enter the facility where the printer is, in the 'Location' field, then click on 'Find now'.
- Maximise the screen and double-click on the printer you wish to add. Click 'Next'.
- Click 'Finish'.

1.3 Create desktop shortcuts to PeoplePoint environments

Production environment:

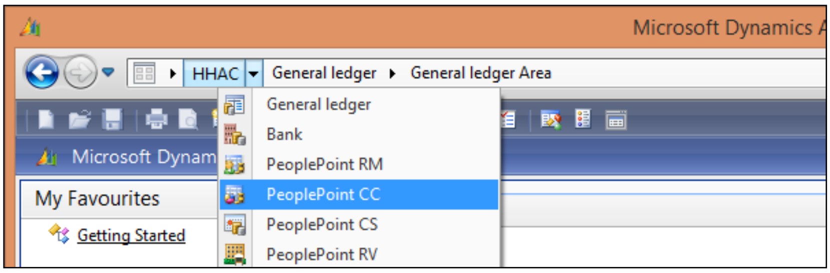
- Go to 'Start' > 'All Programs'.
- **Right click** on PeoplePoint Production.
- Click on 'Send to'.
- Click on 'Desktop (create shortcut)'.

Training environment:

- Go to ‘Start’ > ‘Computer’
- Double -click on ‘Transfer (T):’.
- Double-click on ‘PeoplePoint Test Environment Shortcuts’
- Double-click on ‘PeoplePoint Test Environment Shortcuts’ again
- Double-click on ‘Terminal Server’
- Right Click on ‘PeoplePoint Training’
- Click on ‘Send to’.
- Click on ‘Desktop (create shortcut)’.

1.4 Open Procura

- Complete the survey by selecting, ‘No I don’t wish to participate’. Then click on ‘OK’.
- Change the Procura module to ‘Procura CC’ by clicking on the arrow after HHAC in the top left area, and selecting Procura CC.



1.5 Add frequently used reports to My Favourites

- Open Reports in the main menu and add the following into My Favourites:
- Handover Report (Reports> Care > Activities > Handover Report).
- Progress Note Report (Reports> Care > Care Planning & Assessment Administration > Resident Progress Notes).
- Bowel Opened Report (Reports > Bowel Opened Report).

1.6 Set up report selection criteria

- See the section later in this manual on Setting up Reports.

1.7 Set up Bowel Register

- Open the Bowel Register (Common Forms> Bowel Register)
- Move the ‘Shift ID’ column to be before the ‘Accommodation no.’ column.
- **Port Pirie staff only**- hide the Facility No. column.

1.8 Email acceptable use agreement

- Find an email from the IT helpdesk regarding the computer Acceptable Use Agreement.
- Follow the instructions in the email to sign the agreement.

1.9 Training hints for key users

- Before the session:
    a. Check that each user has been assigned and knows their logon.
    b. Check that each user knows where, when and how long the training will be.
    c. Prepare Procura with new dummy clients as described in the training and competency tools.
    d. Print a hard-copy training and competency tool for each learner.
- For training setup, if possible:
    a. Have one computer for each user. Computer systems cannot be learned by just watching someone else; hands-on practice is essential.
    b. Have dedicated ‘off the floor’ training time. Users who are worried that they are supposed to be doing something else will probably not concentrate or learn.
    c. Do not train in a public area such as a nurses’ station, where interruptions will inevitably occur.
    d. Set the training space up to force learners to turn their backs to their computers to see you and what you are demonstrating. If this is not possible, use a ‘hands off your computer while I’m talking or showing’ approach. Users who are trying to listen, watch and copy you all at the same time don’t learn.
- During the session:
    a. Take it slow! Many new users are afraid of being ‘shown up’ and will not admit to difficulty with a concept or procedure. Be willing to demonstrate at least three times. Give lots of opportunities for users to say, ‘I don’t understand; can you show me again?’.
    b. Be sensitive and accommodating to culture and language differences.
    c. Don’t assume new users are familiar with basics such as a mouse or keyboard. For first-time users, doing anything with a computer may be quite frightening. Reassure such users that they can’t ‘break’ anything in the Clinical Training environment.
    d. If the session is long, insist on the learners having a stand-up-and-stretch break every half an hour. Remind users to sit up straight with their shoulders relaxed, not hunched over, and assist them to have the monitor at eye-height if possible.
    e. If a learner is experiencing a lot of difficulty, don’t just keep ‘ploughing on regardless’, as this achieves nothing except learner distress.
        i. Get the learner to practice what they *can* manage within the session.
        ii. Set the learner a little ‘homework’ to practice outside of the session.
        iii. Make another session time for when the learner feels more confident.

iv. This must be negotiated with the learner's manager.

- At the end of the session:
    a. Remind users about who can assist them on a day-to-day basis.
    b. Refer again to the manuals and work instructions.
    c. Advise each learner's manager of the learner's competency outcome, and if applicable, describe any issues and make plans with the manager to address these.
    d. Get the Pay Global learning and development module updated with each learner's outcome, via site admin staff.

2 General information

2.1 User manual

Detailed Procura instructions are available in the *Procura CC User Manual*.

- Available in hard copy and on the intranet.
- Find hard copies in bright lime green folders next to computers in the nurses' stations.
- On the intranet, from the home page go to Care > Documentation > Procura User Manuals and Guides.

2.2 Agency staff

- Agency staff must use Procura for documentation.
- See Work Instruction CARE002W Agency Staff Computer Access for further information.

2.3 Care plans and case files

- There is a specific manner in which care plan folders and case notes are to be set up for new clients. Please see these Work Instructions:
  - CARE012W Case Notes Management New Admission
  - CARE010W Care Plan Management

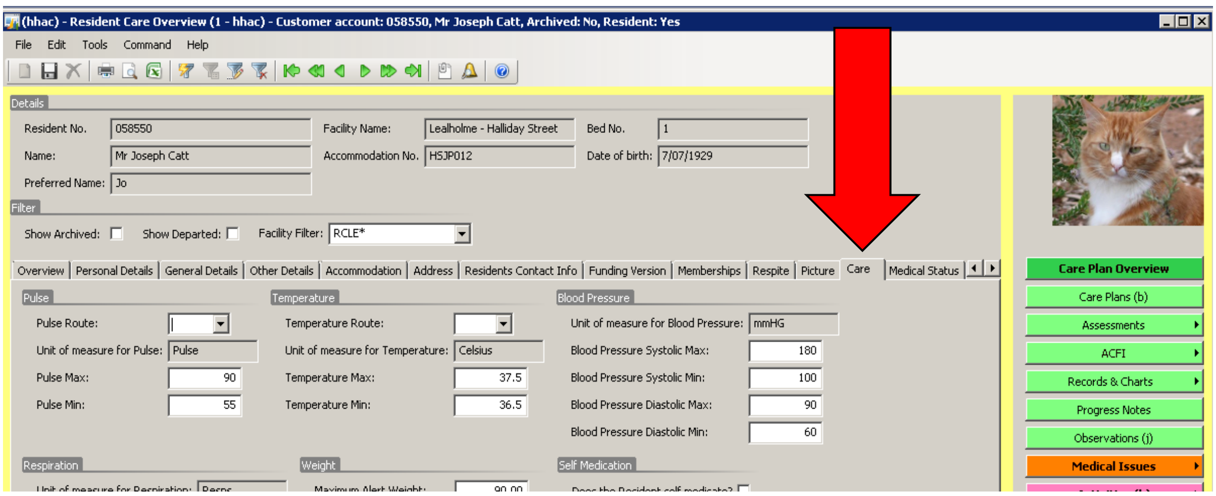
2.4 Care parameters

Helping Hand has set upper and lower limits (parameters) in Procura for what is normal for client temperature, pulse, respirations, blood pressure and weight. When a reading is recorded that is outside these standard limits, an automatic alert is generated.

Some clients do not naturally fit within these limits; for instance the weight of a very short person might normally be below the Helping Hand minimum. The Helping Hand settings can be overridden for these clients so alerts are not unnecessarily generated.

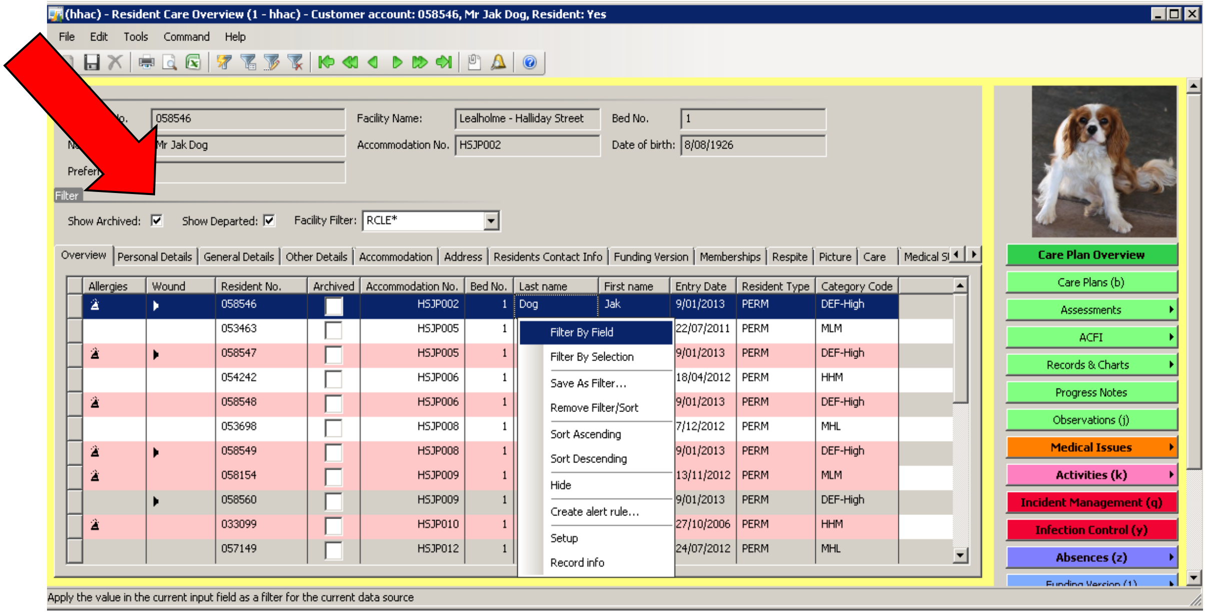
ENs or RNs can change the parameters. This stops alerts from occurring when information is entered ***if it is normal for the client.***

- In the Resident Care Overview, click on the 'Care' tab.
- Enter the client's individual settings.



2.5 Archived/departed client - view

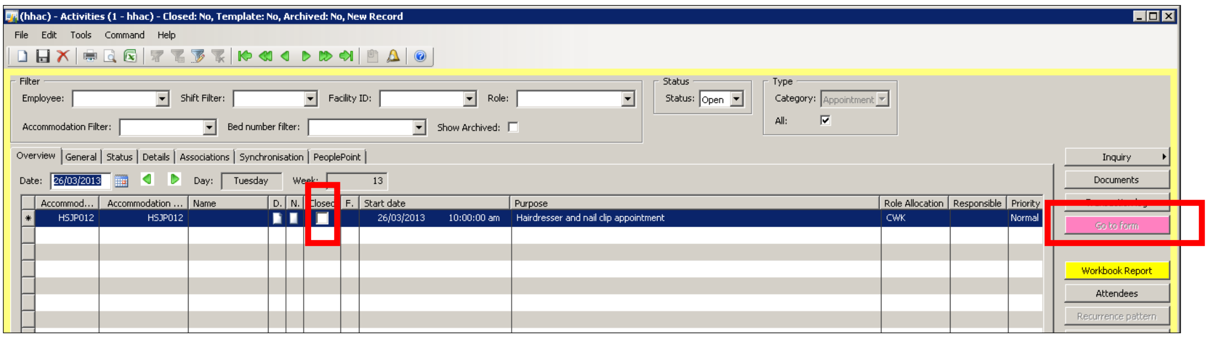
- On the Resident Care Overview are tick boxes: ‘Show Archived’ and ‘Show Departed’.
- Tick the two boxes and all archived/departed clients will appear on screen.
- Search for the name via ‘Filter by field’; the client’s information can be accessed as usual.



2.6 Activities – one-off appointments

The activity workbook can be used as a diary. This ensures all staff are aware of what the client requires on a shift, and all information is in one place. It can be used for appointments, blood tests, social outings etc.

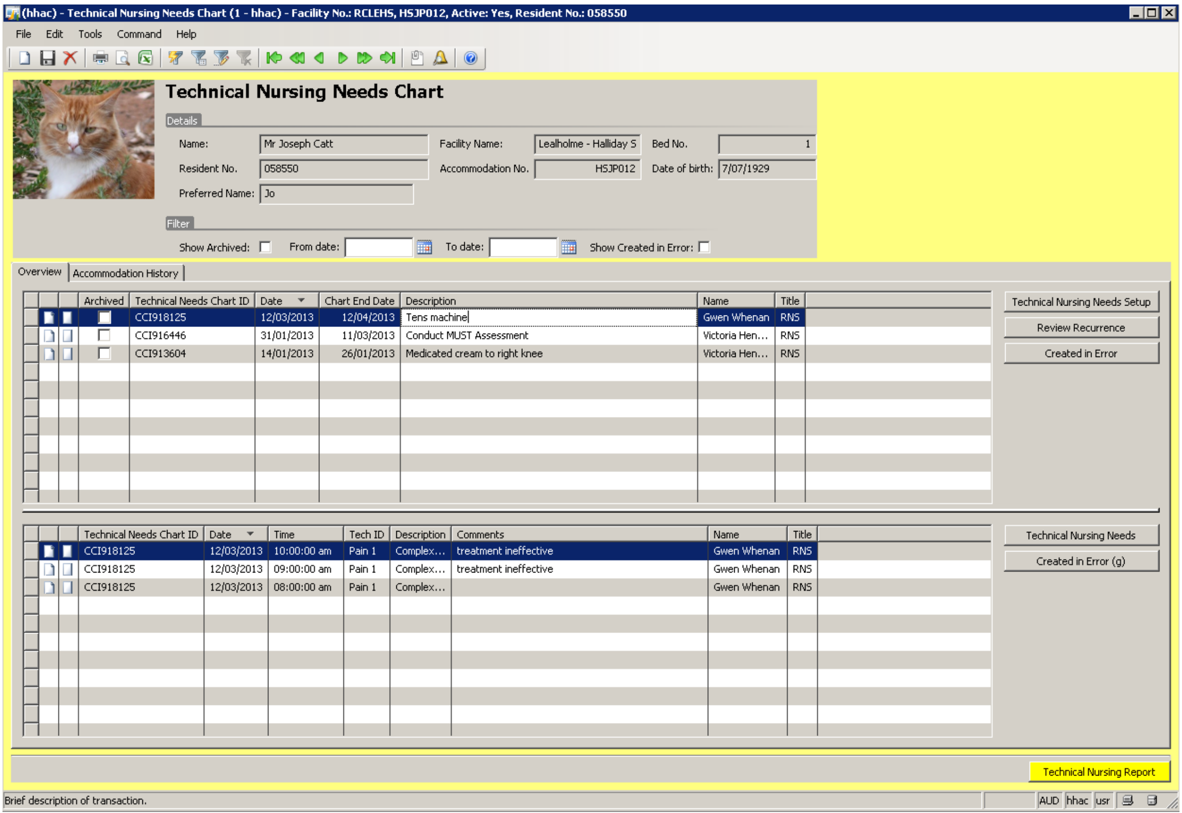
- Go to Resident Care Overview > Activities > Activity Details.
- Go to the date of the appointment and enter a new line.
- Scroll to the ‘End Date’ column and enter the end date and time (the time is usually the end of shift time).
- Enter the shift into the ‘Shift Setup’ column, using drop-down box.
- Scroll to ‘Start Date’ column and enter date and time of appointment.
- Under ‘Purpose’ type the appointment detail.
- Under ‘Role Allocation’ use drop-down box to allocate to role.



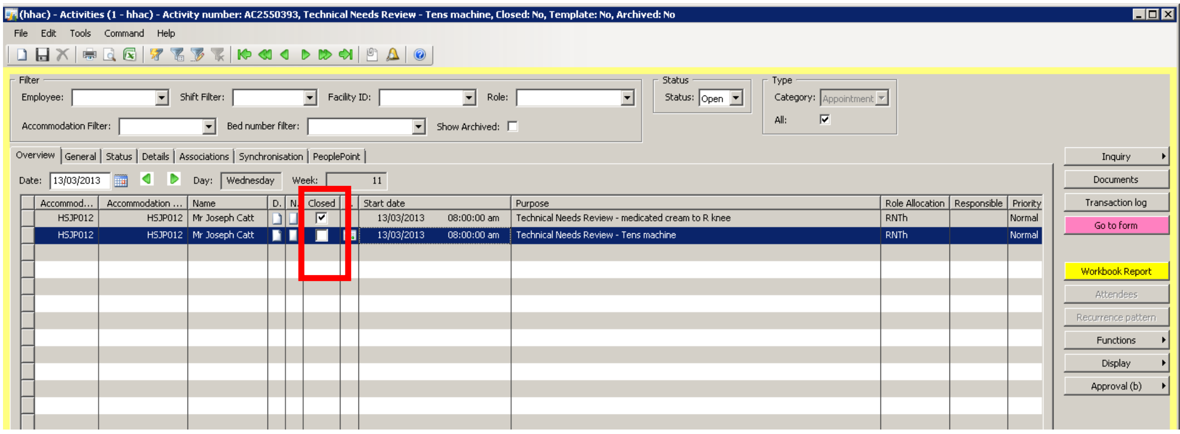
- One-off appointments do not have the ‘go to form’ option highlighted. Therefore you must check the closed box next to the activity in the workbook. Once you leave the screen and then return, the activity will have gone.

2.7 Activities - Go To Form function

- When using the 'Go to form' function from the activity workbook, Procura takes you to the top chart in the list of charts of that name, so check you have the right one! There is no need to click in the upper half of the chart screen or you may accidentally archive the chart.

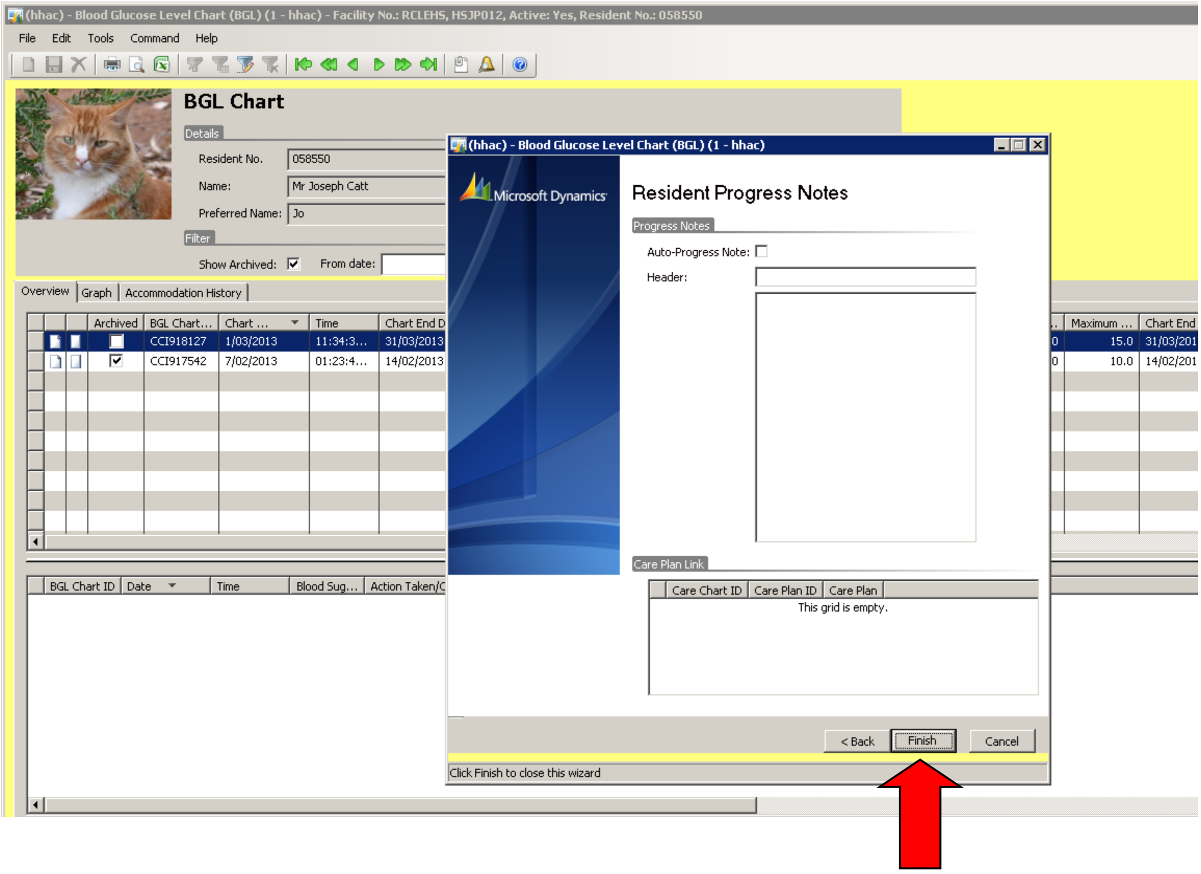


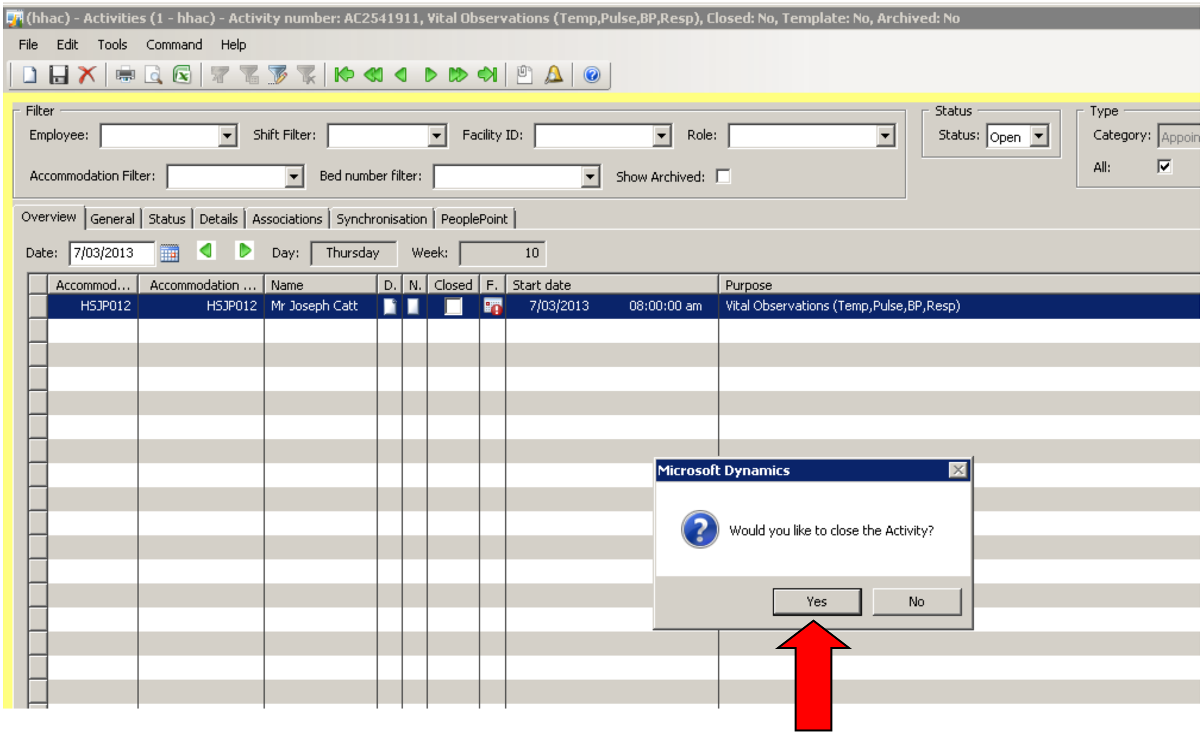
- If there is more than one chart to be completed (eg Technical Nursing Needs where the client may require Tubigrips as well as Flexall), complete the correct chart first, then click on the second chart and complete. When back in the activity workbook, tick the 'closed' box to archive the second activity.



2.8 Activities – close a task via the chart

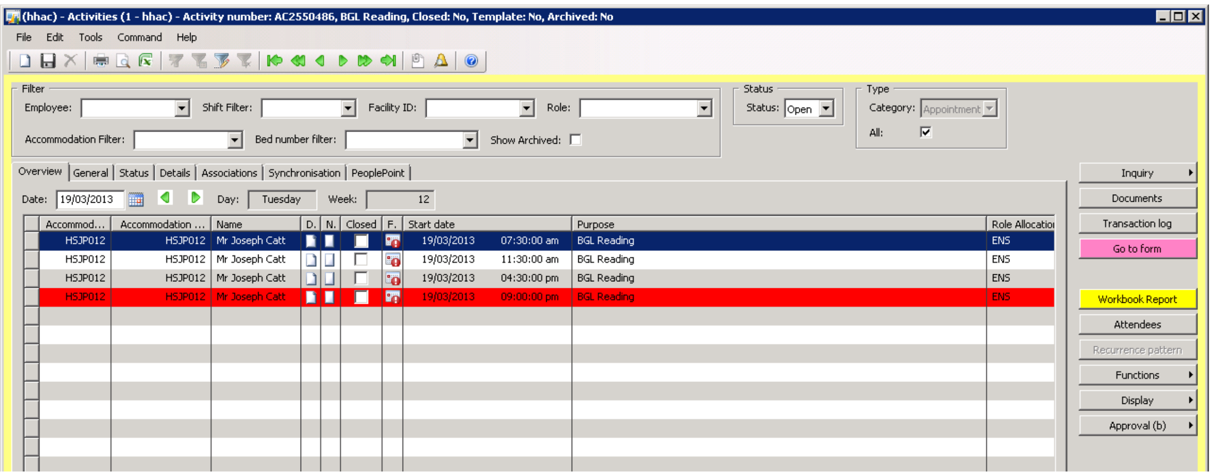
- Click on the **Finish** button at the bottom of the chart screen, **not** the cross at the top right hand of the screen.
- Once you have done this, you will see a pop-up box with **Would you like to close the Activity?**
- Click **Yes** and the activity will be closed for you in the activity workbook.





2.9 Activities – red line explained

- Red lines on the activity workbook mark the last recurrence for a chart, NOT that the activity is overdue.
- In the example below, a new BGL chart would need to be set up if BGLs are to be taken after this date



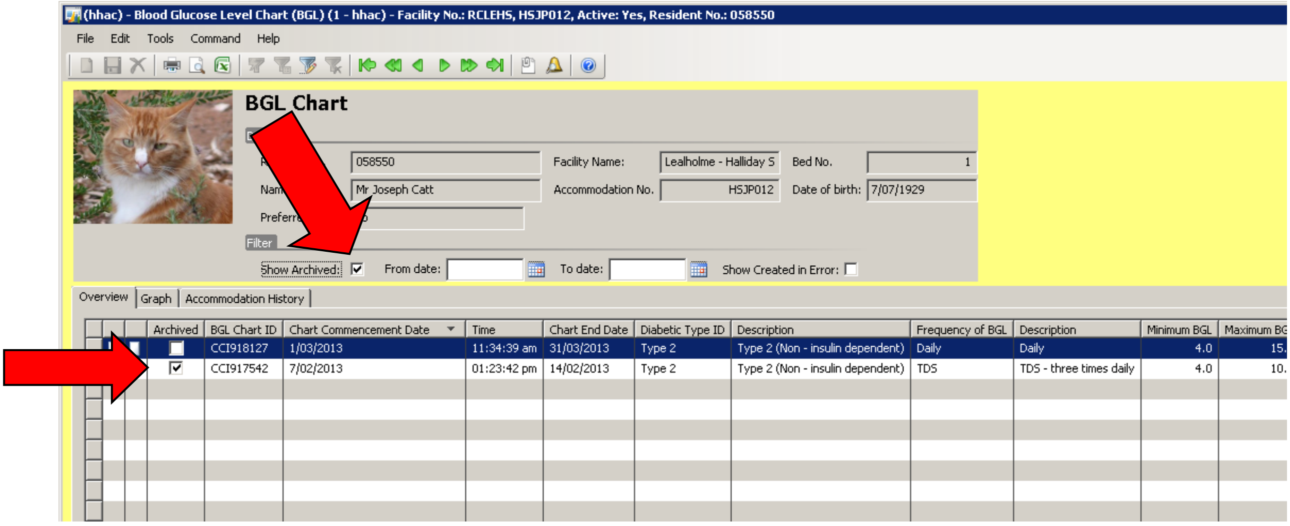
Note: *Activities due at a previous time are identified by a red dot in the column titled 'F'. Overdue activities do not show on future shift or day workbooks.*

2.10 Activities – remove or change recurrence

- If there is a chart set up with recurrent activities that are no longer required, there are two ways to remove these from the activity workbook:
  - If there are only a few activities: tick the 'closed' box for every activity in the workbook.
  - If there are many remaining activities to be removed:
    - Create a 'dummy' chart with a
    - After clicking 'finish', select 'delete existing recurrence' on the pop-up box to remove unwanted activities (enter **yesterday's** date)
    - Click 'close and don't add new recurrence'.
    - Tick the dummy chart as Created in error.

2.11 Records/charts – view archived

- In the top half of the screen should be a **Show Archived** tick box.
- Click on this to show all archived records/charts.
- Select the one you want to retrieve and click the **Archived** box on that line to remove the tick.
- This will remove it from archiving, available for use.



1. ***Note:*** *Archiving a record/chart does not remove related tasks from the workbook.*

2.12 Therapy register

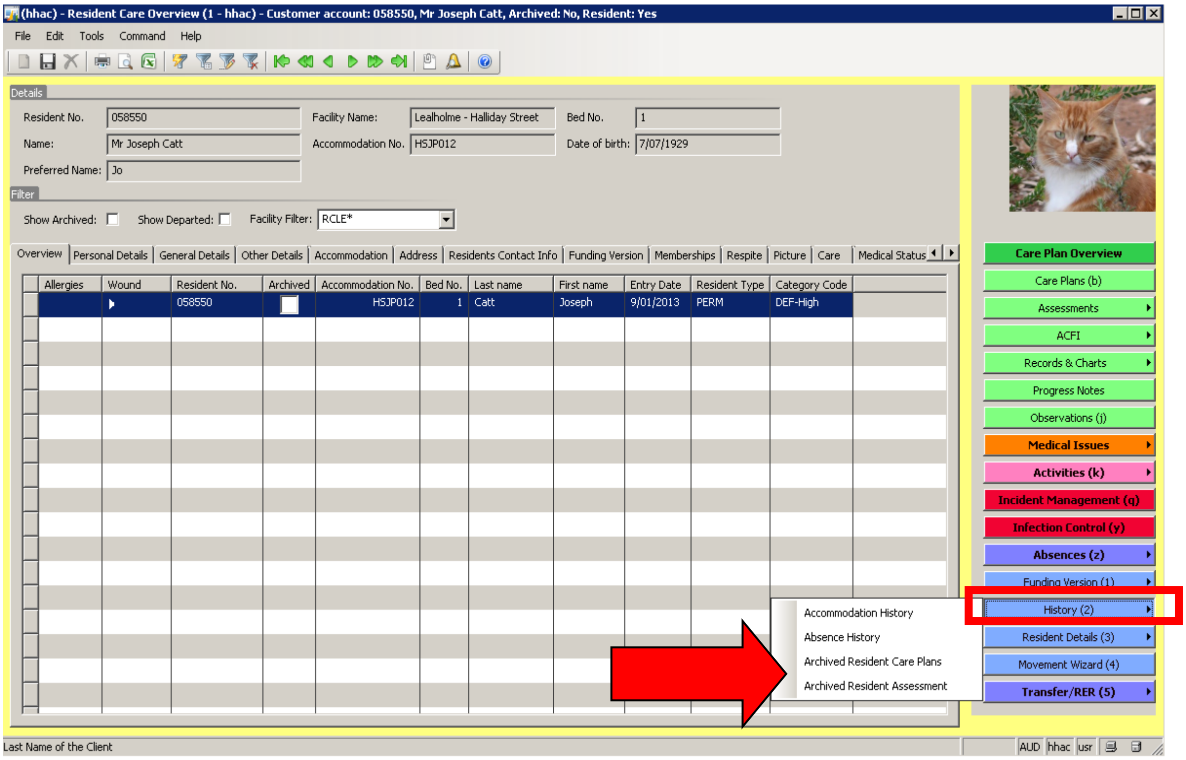
- Create a new line in the upper part of the screen.
- Ensure the following fields are filled in. If this is not done, they will not show on the Therapy Reports:
  - Therapy Register Group ID
  - Facility No.
  - Accommodation No.
  - Therapy Time
  - Duration
  - Therapy ID
  - Comments
- Then click in the bottom half of the screen to produce the list of clients.
- Select the clients that attended, and then click ‘Update for residents in the group’.
- On the pop-up box, don’t tick that you want to create a progress note. Just click on ‘ok’.

2.13 Absence register

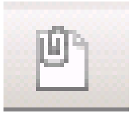
- It is the responsibility of the RN/EN to enter the start and end of client absences for hospital or social leave.
- Using Resident Care Overview > Absences > Record Absence, enter required information into the wizard. Include an auto-progress note.
- When client returns from leave, using Resident Care Overview > Absences > Edit/End Absence, record the return details. On the wizard check the box for ‘Update when finishing wizard’, and include an auto-progress note.
- When asked whether to create an event, always click ‘ok’.
- The Movement Wizard is **only** for clients who are swapping beds, or permanently leaving the facility (via facility transfer or other methods).

2.14 Assessments/care plans – view archived

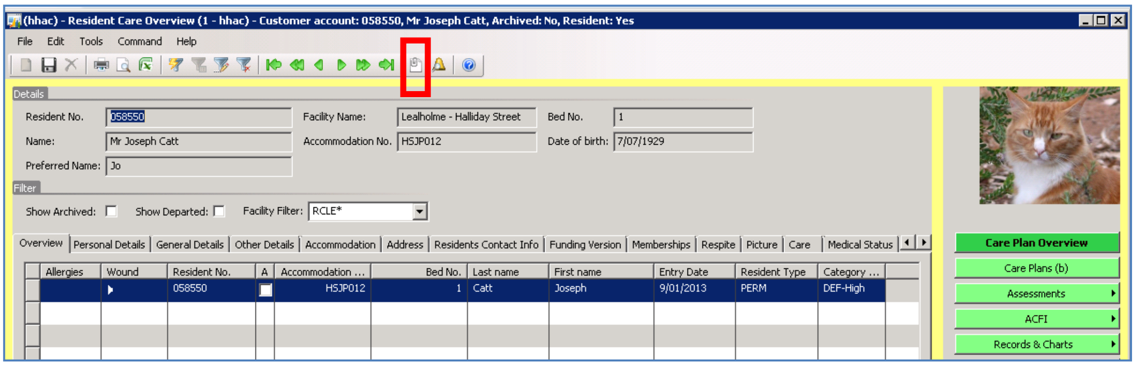
- On the Resident Care Overview screen, click on the blue **History** button on the lower right of the screen.
- Click on this and then select either **Archived Resident Assessments** or **Archived Resident Care Plans.**
- From there you will be able to select the assessment/care plan you want to view.
- Click **Print** to view the document – this will make it appear on the screen, not print it out on paper.



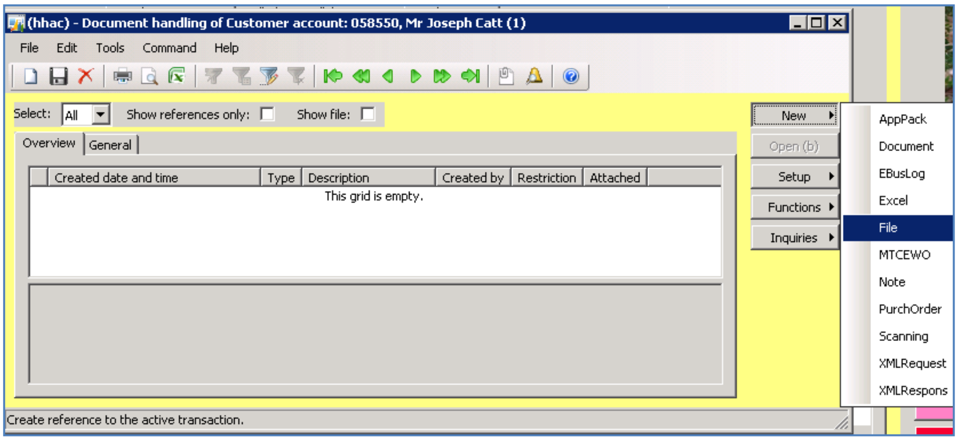
2.15 Document attachments



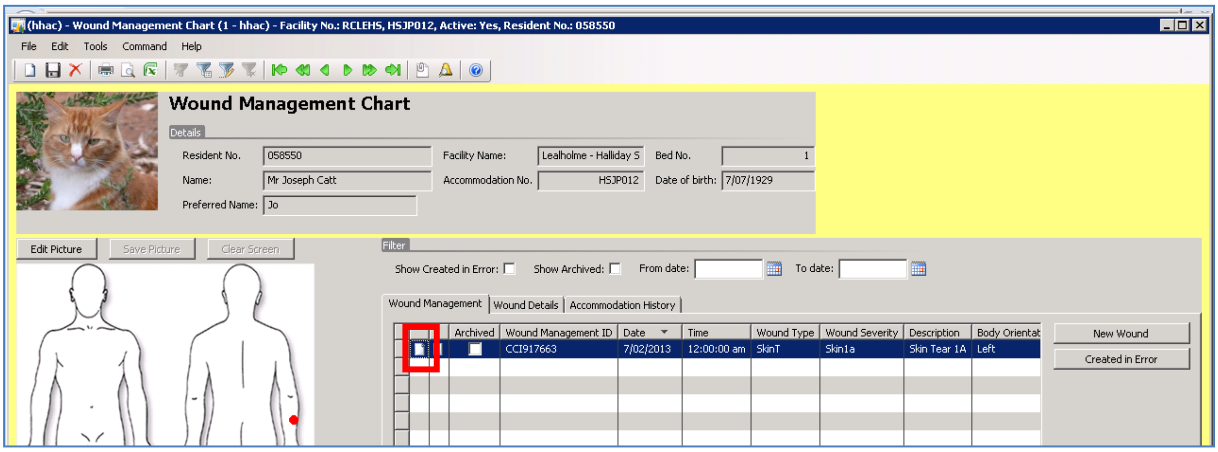
- Scanned documents can be attached to a client's file, progress note, or chart.
- To add a general document, click the 'paperclip' button shown below .



- This opens the 'Document Handling' screen. To attach a document, click 'New' then 'File'.
- Accessible files will now show on the screen.
- Select the desired document by double-clicking on it (like attaching to an email).



- To attach a document to a chart (e.g. a wound photo) or to a progress note (e.g. an external allied health assessment), click the icon next to the chart or progress note you wish to attach the photo/document to, then follow the above instructions.

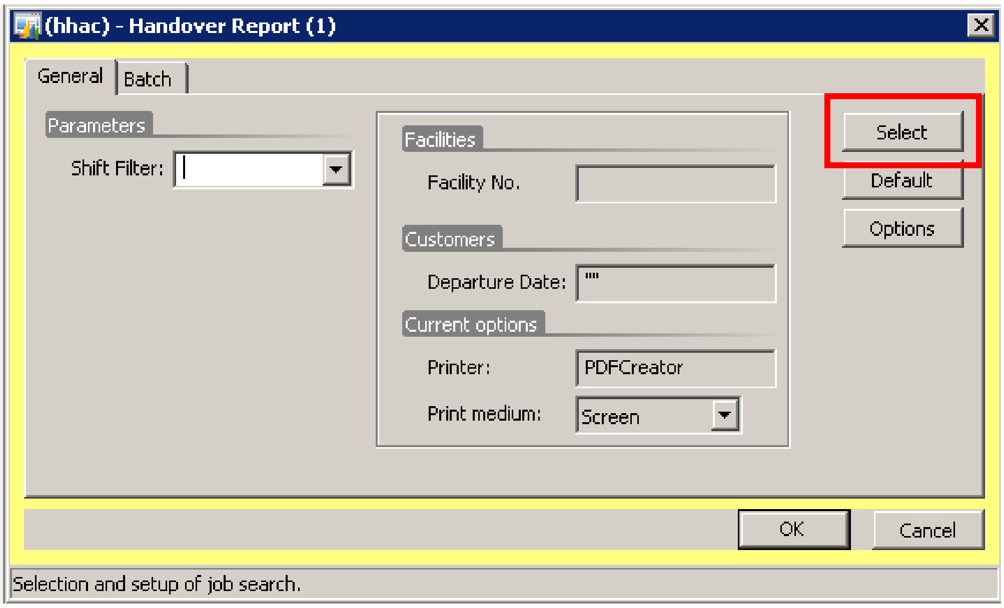


- To show that there is an attachment, the icon will then change to look like a little blue book.

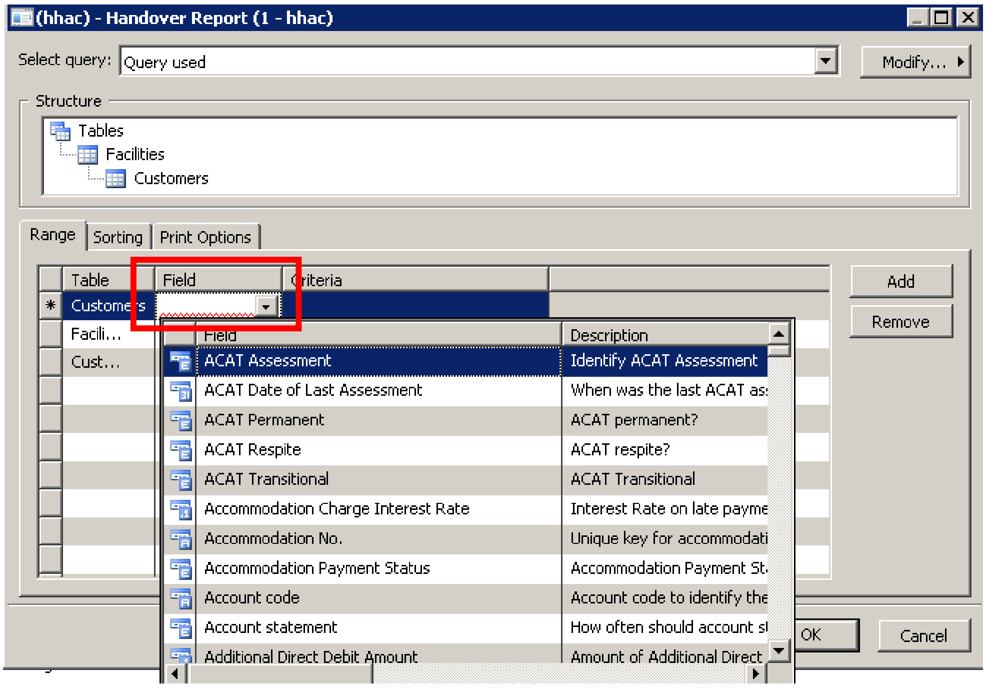
2.16 Reports – setting up

When running reports for the first time (or when changing what you want the report to show) some setup is needed.

- In the main menu, click on the title of the report you want to run. A dialogue box will open.
- Click on the 'select' button to add in any fields you need.



- Another dialogue box will open.
- You may need to add extra lines to get the information you need; to do this click 'Add'.
- A new line will be created; there are three sections: table, field and criteria. Each of these needs to have any entry to continue.
- Make selections using the drop-down boxes.



- The information selected will depend on the report you wish to generate. Common reports include:

Handover Report typical setup

Table	Field	Criteria
Customers	Accommodation No.	Free-text dependent on area
Facilities	Facility No.	Select via drop-down
Customers	Departure Date	“”

Note: Leave the “” in the criteria next to Departure Date. This removes departed clients from the report.

Resident Progress Notes Report typical setup

Table	Field	Criteria
Customers	Accommodation No.	Free-text dependent on area
Customers	Facility No.	Select via drop-down
Progress Notes	Progress Note Header	Free-text

Bowel Opened Report typical setup

Table	Field	Criteria
Customers	Accommodation No.	Free-text dependent on area
Customers	Facility No.	Select via drop-down
Customers	Departure Date	“”

2.17 Evacuation Report

- Every facility should have a current evacuation report in each area
- The information detailed in the report includes:
  - Accommodation no.
  - Client name
  - Doctor name
  - Mobility status
  - Primary contact name
  - Primary contact number
- See ‘Clinical Procura Quick Reference Guide- Minimum Data Set’ for details on how to complete the information

3 Troubleshooting

3.1 Computer access – cannot get

<table>
<tr><th>Problem</th><th colspan="3">I can’t log onto the computer at all.</th></tr>
<tr><td>Cause</td><td colspan="3">There are many possible causes for this issue.
(Rarely there may be computer network or site power problem that you can’t fix.)</td></tr>
<tr><td rowspan="2">Try this first</td><td colspan="3">Are you trying to enter the wrong password? You get 3 chances to get it right; then the system will lock you out for 20 minutes, after which you can try again.</td></tr>
<tr><td colspan="3">Shut down the computer, then turn your computer power off and then on again, and try to log on again.</td></tr>
<tr><td rowspan="5">If that doesn’t work</td><td>In business hours
(8 am-5 pm)</td><td colspan="2">Call the Information Systems Help Desk on 8366 5499 for assistance.
Have the computer number, eg HHACXXXX (found on the front of your computer) and/or your username handy.</td></tr>
<tr><td rowspan="4">Outside business hours</td><td rowspan="3">Not urgent</td><td>Switch off your computer, wait half an hour, then switch it on and try again (a temporary fault may have cleared).</td></tr>
<tr><td>Try another computer on the site and temporarily use that if it works.</td></tr>
<tr><td>Call the helpdesk on 8366 6599 and leave a detailed message, or email: helpdesk@helpinghand.org.au
The issue will be attended as soon as possible in business hours</td></tr>
<tr><td>Urgent</td><td>Emergency out-of-hours support via mobile phone (Information Services team):
Shane Wheeler – 0406 660 916
Simon Brewer – 0404 855 774</td></tr>
</table>

3.2 Procura access – cannot get

<table>
<tr><td>Problem</td><td colspan="3">I logged onto the computer as usual, then tried to open Procura and it would not open.</td></tr>
<tr><td>Cause</td><td colspan="3">There are many possible causes for this issue.
If you are a brand new user, did your site send off a form requesting access for you? If this was not done, you will need to use an Agency logon until this is resolved.</td></tr>
<tr><td rowspan="2">Try this first</td><td colspan="3">Make sure you are trying to open Procura Production, not something else.</td></tr>
<tr><td colspan="3">Log off from the whole computer, then log back on and try to open Procura again.</td></tr>
<tr><td rowspan="3">If that doesn’t work</td><td>In business hours
(8 am-5 pm)</td><td colspan="2">Call the Information Systems Help Desk on 8366 5499 for assistance.</td></tr>
<tr><td rowspan="2">Outside business hours</td><td>Not urgent</td><td>Call the Help Desk on 8366 6599 and leave a detailed message, or send an email to: helpdesk@helpinghand.org.au. The issue will be attended as soon as possible in business hours.</td></tr>
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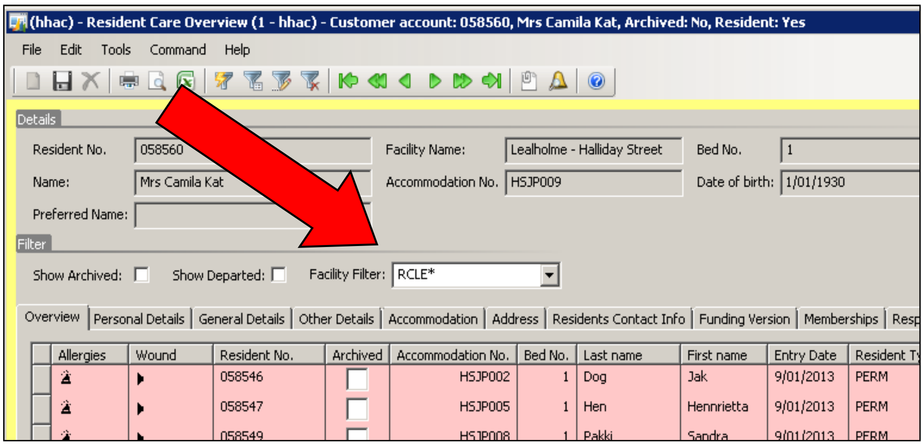
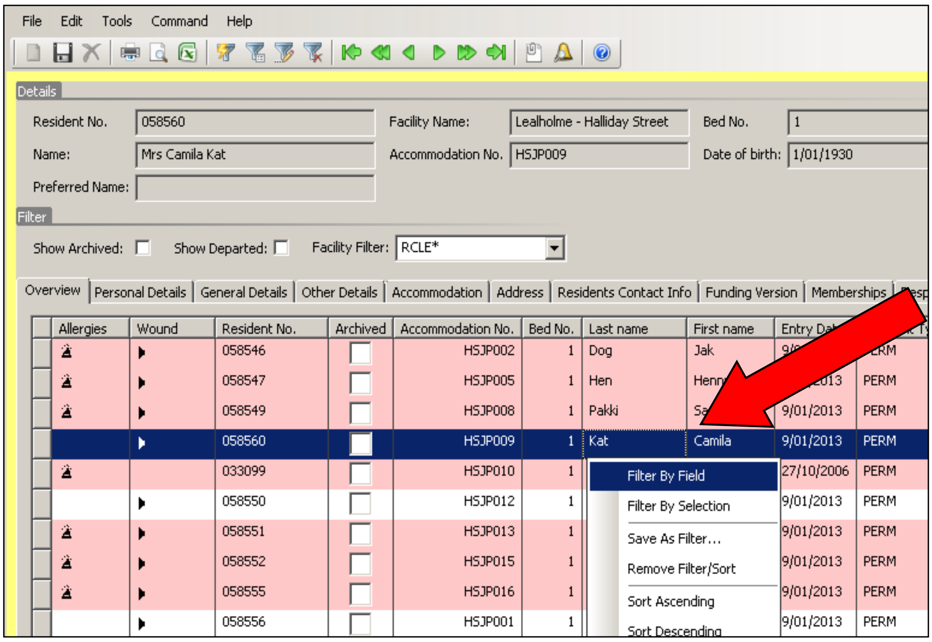
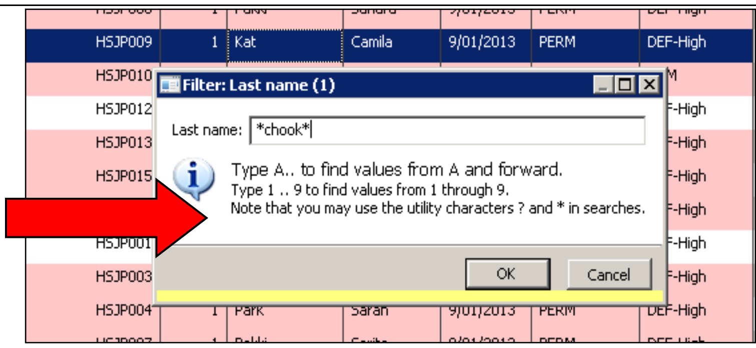
Shane Wheeler – 0406 660 916
Simon Brewer – 0404 855 774</td></tr>
</table>

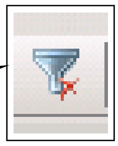
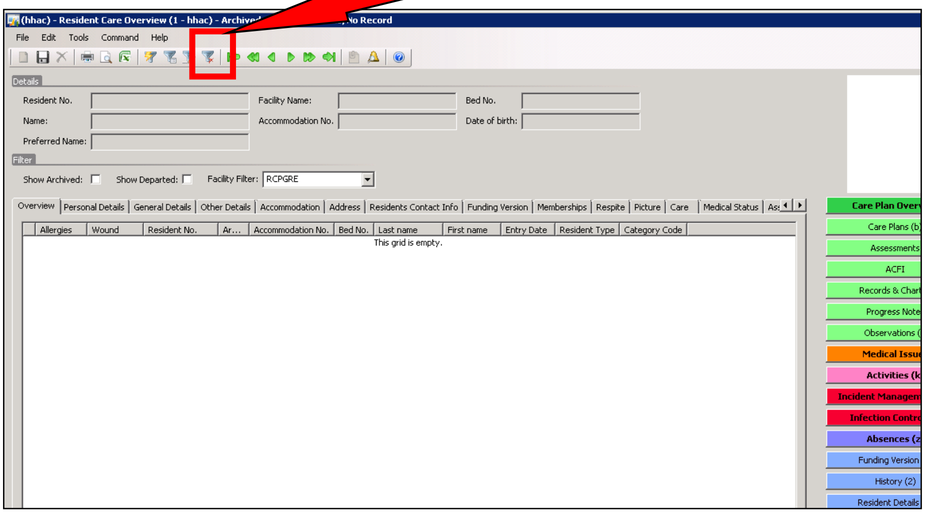
3.3 Client – cannot find

<table>
<tr><th>Problem</th><th>I can’t find a client in Procura</th></tr>
<tr><td rowspan="4">Try this</td><td>Has client has been archived (eg discharged, departed or died)? If so, please see ‘Archived client’.</td></tr>
<tr><td>Do you have the correct spelling of the name?</td></tr>
<tr><td>Have you have filtered on the right facility?


Note: Ingle Farm- select Ingle Farm Aged Care
Port Pirie- select either Lealholme – Halliday St or Lealholme – Senate Rd</td></tr>
<tr><td>Try filtering by last name. Remember to put asterisks * before and after the name.

</td></tr>
</table>

	
	Ask a key user for assistance. If no key user is available, ask an experienced co-worker.

3.4 Client list – blank

Problem	My client list is blank.
Try this	If the screen is white and displays 'this grid is empty,' click on this button at the top of the screen. All clients will reappear.  
	Ask a key user for assistance. If no key user is available, ask an experienced co-worker.

3.5 Fields/columns – missing

Problem	A column is missing in Procura
Cause	You have accidentally hidden the column. This can be done anywhere in Procura.
Try this	Right click on the area of the screen that has information missing. Then left click on 'Show' in the list that appears. Then click on the title of the missing area in the list that appears, and it will return.
	Ask a key user for assistance. If no key user is available, ask an experienced co-worker.

3.6 System – frozen

Problem	Procura has 'locked up' or frozen, and won't do anything.
Cause	Like any computer system, Procura will freeze on occasion. This is most likely if you double-click on 'Finish' in a chart wizard, or if you double-click on 'OK' when generating a report.
Try this	Wait. Sometimes the system just needs time and will un-freeze itself (usually when freezing from a chart wizard).
	Sometimes you will need to close Procura and start again (usually when interrupting a report).
	Ask a key user for assistance. If no key user is available, ask an experienced co-worker.

3.7 Activities – too many tasks

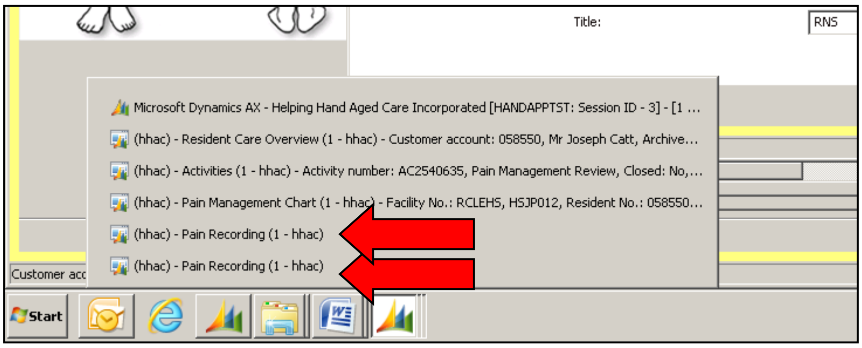
Problem	Too many tasks in Activities.
Cause	Tasks have not been closed correctly: see 'Activity Workbook- Open Tasks' Records/charts have not been set up correctly: see Work Instruction for specific record/chart

3.8 Records/charts – missing information

Problem	Information is missing from my chart or record.
Cause	Many possible causes: • The chart wizard was not closed properly. • The chart wizard was closed before all the information was entered. • The information was left out by accident.
Try this	Once a chard wizard has been finished, you cannot add anything to it. Mark the incorrect entry as ‘Created in error’, and enter the information again via a new wizard.
	Don’t close a chart wizard by clicking on the X button on the top right, as this just cancels it. Close it by clicking on the Finish button on the bottom right.
	Ask a key user for assistance. If no key user is available, ask an experienced co-worker

3.9 Screen – will not close

<table>
<tr><th>Problem</th><th>I can’t close the Procura screen I have open.</th></tr>
<tr><td>Cause</td><td>You probably have another open screen hiding behind the screen you can see. Many Procura screens won’t close if a related screen is still open.</td></tr>
<tr><td>Try this</td><td>Don’t double click in Procura. This will sometimes open a screen twice without you realising it.</td></tr>
<tr><td></td><td>Look at the toolbar at the bottom of the screen. If you click on the Procura icon you get a list of all screens that are open. Select and close any extra screens you aren’t using.

In the example below, the user has the pain chart wizard open twice.

</td></tr>
<tr><td></td><td>Ask a key user for assistance. If no key user is available, ask an experienced co-worker.</td></tr>
</table>

3.10 Bowel register – too many or too few clients showing

Problem	I don't see the correct clients in the bowel register.
Cause	The correct accommodation number has not been entered in the upper half of the screen (most likely caused by pressing 'enter' after typing in the area, not clicking in a blank grey section of screen), or the accommodation has not been entered at all.
Try this	Make sure when clicking on each section to enter information that you click in the blue line, not the grey header line.
	Mark the line as 'Created in Error' and start again.
	Ask a key user for assistance. If no key user is available, ask an experienced co-worker.

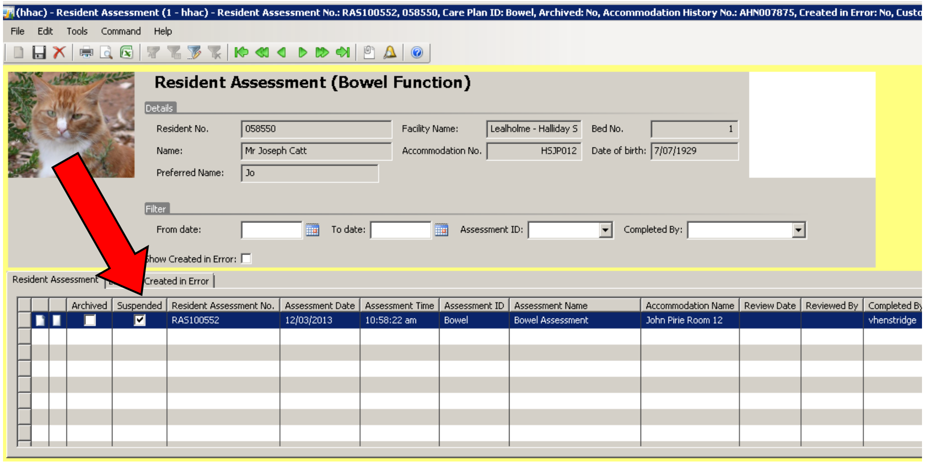
3.11 Bowel register – will not update

Problem	I cannot update the bowel register.
Cause	Multiple causes: • Information has not been entered for some clients in the list. • The new line was created in the bottom pane of the window, not the top one.
Try this	Scroll down the list of clients using the scroll arrows (not the bar) to check, and fill in any missing information. If you can't see both scroll arrows, maximise the screen.
	Ensure a new line hasn't been created in the bottom half of the screen; some users don't click in the upper half of the screen first before making a new line. If a new line has been created, delete it.
	Ask a key user for assistance. If no key user is available, ask an experienced co-worker.

3.12 Assessment - locked/suspended

<table>
<tr><th>Problem</th><th>My assessment is suspended and I can’t un-suspend it.</th></tr>
<tr><td>Cause</td><td>If an assessment is copied and then suspended it will ‘lock’ and cannot be resumed.

When a suspended assessment is present, another of the same name cannot be started.


</td></tr>
<tr><td>Try this</td><td>Plan not to copy an assessment right at the end of a shift, so that it can be completed in one ’go’ without having to suspend.

Only the help desk can unlock these assessments so they may be resumed. Contact the helpdesk (leave a message if calling after hours) and give the:
• Client name and Resident Number
• Assessment title and Assessment Number</td></tr>
</table>

3.13 Assessment – Missing

Problem	My assessment is missing.
Cause	The user has clicked on the cross at the top right hand corner of the screen, instead of the Finish button on the last screen of the assessment, (see also ‘tasks are not being closed off in the activity workbook’).
Try this	The assessment will have to be done again. There is no way to get it back once it has been closed in this way.

3.14 Care Plan – blank

Problem	My care plan is blank.
Cause	Multiple possible causes: • The user did not finish the corresponding assessment correctly - see above 'Missing Assessment'. • The user created the care plan before doing the assessment(s). • A few assessments do not create anything in the care plan, eg you cannot create a **Pain** care plan with just the Abbey Score; you need to do the pain assessment as well.
Try this	Do the required assessment(s). Then go back to the care plans screen, archive the blank care plan and create a new care plan.

3.15 Report – blank

Problem	My report is blank.
Cause	Multiple possible causes: • The report was not set up correctly. • There may actually be nothing to report.
Try this	If you are sure the report should not be blank, ask a key user for assistance with the set up. If no key user is available, ask an experienced co-worker.