

ATTACHING DOCUMENTS BYPASSING FORCURA

*Only for use when experiencing a delay in
upload to HCHB directly from Forcura

THIS GUIDE TO BE USED IN CONJUNCTION WITH THE RECORDED TRAINING

- ▶ Enter the patient in HCHB
 - ▶ Only demographics & address need to be entered to attach documents
 - ▶ Note that the line at the top of both tabs is Green

STEP 1 IN HCHB

[NEW REFERRAL FOR HOME HEALTH] PATIENT

PATIENT, TEST

Basic Info | Demographics

Branch Assignment *

Branch:*
COR - TEMPLATE BRANCH

Team:*
TEAM 1

Location:

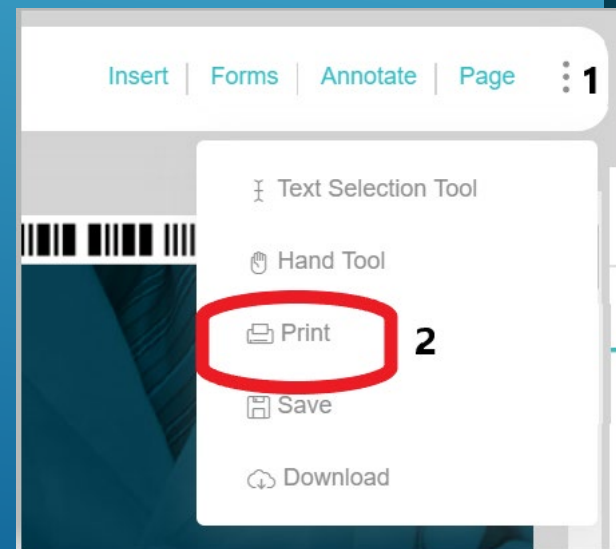
Patient Name *

Last Name:*
PATIENT

First Name:*
TEST

- ▶ Move back to Forcura and create a case
 - ▶ Enter the appropriate information in fields with the following exceptions:
 - ▶ Status – Use “Working Referral”
 - ▶ Patient – DO NOT choose a patient.
 - ▶ Create the case
- ▶ Once all documentation has been received from the referral source and combined, print to PDF
 - ▶ Save in your p drive or on your desktop

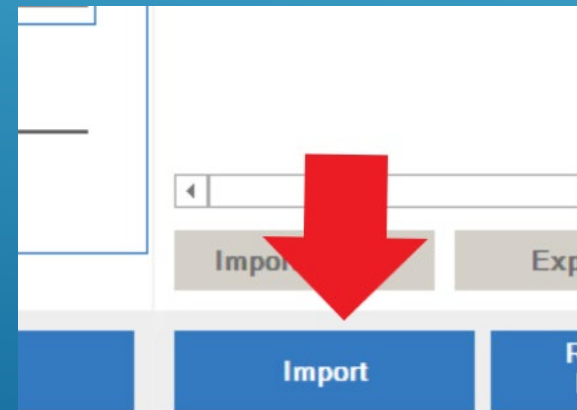
The screenshot shows the 'Edit' form in Forcura. The 'Case Name' field contains 'Test'. The 'Type' dropdown is set to 'REFERRAL'. The 'Status' dropdown is highlighted with a red circle and set to 'WORKING REFERRAL'. The 'Security Group' dropdown is set to 'HHH (Hallmark Health H...'. A 'Save' button is visible at the bottom right.



STEP 2 IN FORCURA

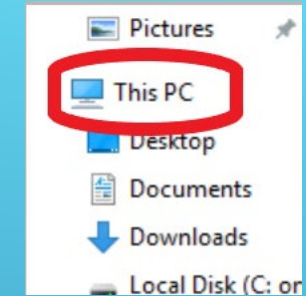
▼ Patient Name ^ ▼	Attachments	MR No	▼ Payor Type
PATIENT, TEST		BNH00001579101	

- ▶ Go to Clinical Input and search for the patient you entered
- ▶ Click to highlight the patient and then click attachments
 - ▶ Click episode attachments
- ▶ Click Import



STEP 3 IN HCHB

- ▶ In the new window, choose “This PC”
 - ▶ Scroll to the bottom and choose P drive
 - ▶ If you do not have p drive or have saved on your desktop
 - ▶ Choose C drive, then users, then your login, then desktop, and finally the document
- ▶ Add the pertinent information to the attachment.
- ▶ Click Save & Close



Settings

Type:
REFERRAL

Location:
CLIENT

Recipients:
PATIENT, TEST

Effective Date Range

From: 08/20/2020 **To:** 08/20/2020

Renewal Reminder Pattern

None Specify Pattern...

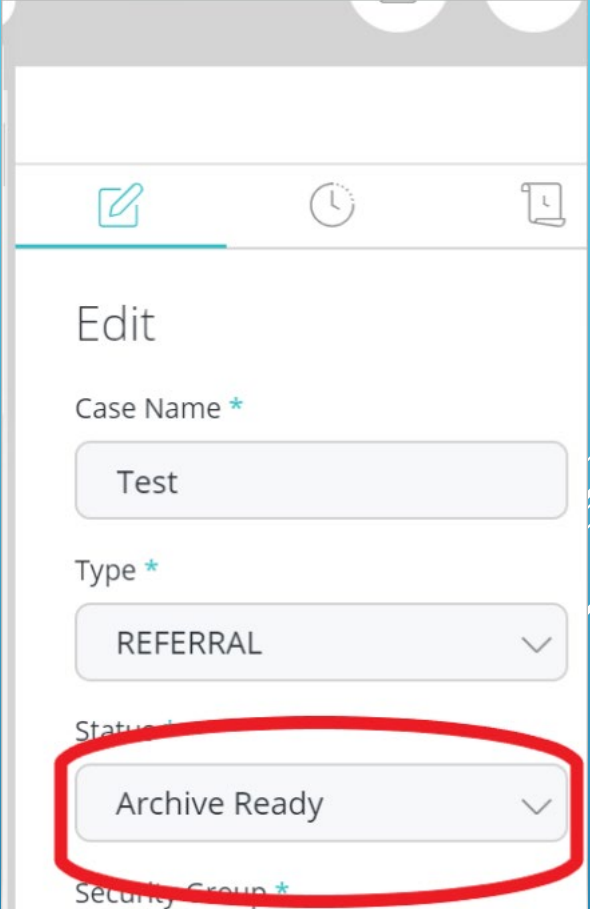
GENERATE A RENEWAL REMINDER EVERY
[] DAY(S) []

THE ATTACHMENT'S VISIT/EFFECTIVE
[] DATE.

STEP 3 IN HCHB

- ▶ Clear all users and tags
- ▶ Change status to “Archive Ready”
- ▶ Click “Save”

STEP 4 IN FORCURA



The screenshot shows the 'Edit' form in the FORCURA application. The form includes the following fields:

- Case Name ***: A text input field containing the value 'Test'.
- Type ***: A dropdown menu with the selected value 'REFERRAL'.
- Status ***: A dropdown menu with the selected value 'Archive Ready'. This field is highlighted with a red oval.
- Security Group ***: A dropdown menu, partially visible at the bottom of the form.

A yellow arrow points from the text 'Change status to “Archive Ready”' in the list above to the 'Status' dropdown menu in the form.

- ▶ Go to the location of the document you saved (Desktop or P drive)
- ▶ Click on the document only once to highlight it
- ▶ On your keyboard, use “Shift + del” to permanently delete the document from your computer



STEP 5 IN P DRIVE OR ON DESKTOP

- ▶ Do I have to delete the document from my PC?
 - ▶ *YES! Storing patient information on any company issued device is prohibited. Using it as a temporary storage in order to move a file is acceptable.*
- ▶ When should I use this method?
 - ▶ *Only when there is a notification at the bottom of the Forcura application that there is a delay in processing attachments.*

FREQUENTLY ASKED QUESTIONS