

# **DOWNTIME PROCEDURE FOR REFERRAL DOCUMENT UPLOAD to EMR HCHB (How to By-pass Forcura)**

- Enter the patient in HCHB (complete basic info/demographics tab)
  
- Go to Forcura and create a case from the document you wish to upload
  - a. To create the case
  - b. Enter the appropriate information
  - c. Put Status to “Working Referral”
  - d. Patient - DO NOT choose a patient name
  - e. Click Create
  
- Gather all referral documents; Wait for all documents that will need to be combined
- Combine documents in Forcura STATUS will still be “Working Referral”
- Once combined and completed; click the vertical ellipsis at the top right
- Click print. A window will open; prompt will appear; save the document to a folder. Choose either your P Drive or the Desktop.
  
- Move back to HCHB, go to Clinical Input. Search for the patient you will upload documents to.
- Click the patient name to highlight the patient, and then click “Attachments” at the bottom right of the screen.
- Click Episode Attachments.
- A new window has now opened. Click Import.
- A new window has now opened. Click “This PC”. Now scroll to the bottom of this window where you see “C: Local on (HHVNA #####)” and P: username” If you have saved the document in your p: drive, click P drive and navigate to the document.
- Click on the document; click open. If you have saved your document on your desktop: click C:, then “Users”, then your username, then desktop, then the document; click open.
- You have now returned to the Import screen and will see that the document is now listed on the left hand side of the window. On the right hand side of the window in the “Settings” box, Choose “Referral” for Type, “Client” for Location, and using the magnifying glass icon in the Recipient field, search for the associated patient. Once you find the patient Click Apply Selections, then click Apply Settings to Checked Files. Click Save & Close.
  
- Move back to Forcura and view the document you have just uploaded to HCHB.
- Clear all users and tags from the document.
- Change the status to “Archive Ready”.
- Click Save
  
- Move back to the location of the document you saved. (Desktop or P Drive)
- Click on the document once to highlight it. Then using the “Shift + Del” keys delete the document. You will be prompted that this will permanently delete the document, click Yes.