Emergency Preparedness

May 9, 2024

PointClickCare®

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Emergency Access

Activating Emergency Access Quick Guide

This quick guide provides the steps required to give all staff remote access. Emergency access is used when residents are being transferred to a temporary location during an emergency.

> **NOTE**
> You must be the security administrator in your facility to activate emergency access.
>
> Emergency access must be deactivated after the emergency is over and all residents and staff return to the source facility.

Step	Action
	Activate Emergency Access for the source facility. 1. Facility > Admin > Setup > Security Users. 2. Select **Activate Emergency Access**. 3. Click **OK**.
	To activate user in destination facility **NOTE** This step is only necessary if the source facility user(s) needs access at the destination facility. 1. Admin > Setup > Security Users. 2. Click **Actions** and select **Access**. 3. Select Facility. 4. Click **Save**.

Activating and Deactivating Emergency Access

The Activate Emergency Access option found in Security Users allows the security administrator in your facility to activate emergency access, giving all staff remote access during an emergency. All other security is unchanged. For example, your facility is in the path for an upcoming hurricane and the residents are being transferred to a temporary location for safety. The Emergency Access is activated for all staff to use PointClickCare while at the temporary location.

When the emergency is over and everyone is back in the facility, the emergency access is turned off, removing remote access from those staff members who did not have remote access prior. Users with remote access previously continue to have remote access when emergency access is turned off.

You can run the login history report to see the users logged in when emergency access was enabled. You can run the report after deactivation to assure the IP addresses match the IP Address Mask for the facility.

Activating and Deactivating Emergency Access is completed at the facility level.

NOTE
This is based on the existing security permission of Security Users set to a minimum of Read/Add/Edit. To activate Emergency Access from outside of your facility, you must have Remote User selected on your user profile.

Steps

To activate Emergency Access

1. Do one of the following:
    - Admin > Manage Users.
    - Admin > Setup > Security Users.
2. Click **Activate Emergency Access** and follow the prompts.

To deactivate Emergency Access

1. Do one of the following:
    - Admin > Manage Users.
    - Admin > Setup > Security Users.
2. Click **Deactivate Emergency Access** and follow the prompts.

Room Listing

You create the Room Listing to enter the room numbers and detailed specifications of each room in the facility. You can associate details to a room based on the features for a facility. For example, amenities, services, and characteristics.

You can change the status of a bed to inactive or retire. A bed can be inactive for a specific amount of time or indefinitely. For example, you may use inactive if the room is being renovated or needed for isolation. Alternately, a bed can be retired. For example, you can retire a bed if the room is remodeled for office use. Retiring a bed is permanent and cannot be reversed. In either case of inactive or retire, all historical bed assignments show on the Room Listing.

In CRM you use the Room Listing when assigning a lead to a possible placement(s). Having the open beds available when assigning a possible placement prevents you from placing multiple residents in a room. In addition, you can see the available and unoccupied Room Listing in Availability & Occupancy (A&O).

NOTE
Before creating Room Listing, complete Units/Floors/Room Pick Lists, Room Characteristics, Rate Type Categories, Rate Types, Room /Rate Types Relationship, Bed Inactivation Reason picklist, and Auto Add Beds.

Set the room unit/rate type effective date before the earliest resident's admission date. For example, 01/01/1900.

Steps

To create a room

1. Admin > Setup > Room Listing.
2. Click **New**.
3. Complete the fields as required.
4. Click **Save**.
5. Click **New** Room/Rate Type.
6. Complete the fields as required.
7. Click **Save** and then click **Save** again.

> **NOTE**
> Complete Beds Certifications after the Room Listing is created. For more information, see Beds Certifications.

To inactivate a bed

1. Facility: Admin > Setup > Room Listing.
2. Click **status**.
3. Select **Bed to inactivate**.

> **NOTE**
> The bed must be unoccupied to be inactivated.

4. Click **New**.
5. Select **Start Date** and select **Stop Date**, when applicable.
6. Type **Notes**.
7. Select **Inactivation Reason**, when applicable.
8. Click **Save**.

To retire a room

1. Facility: Admin > Setup > Room Listing.
2. Click **status**.
3. Type **retired as of date**.
4. Click **Retire**.
5. Click **OK**.

To increase room occupancy

1. Facility: Admin > Setup > Room Listing.
2. Click **edit**.
3. Select **Bed(s)**.
4. Click **New Room Type**.
5. Select **Effective Date**.
6. Select **Room Type**.
7. Select **Rate Type**.
8. Click **Save**.

> **NOTE**
> Update the Facility Assessment if you add or remove beds. For example, if the bed count changes from 110 to 125.

Transferring a Resident between Facilities Quick Reference Guide (QRG)

This quick reference guide provides the steps required to complete an Master Patient Index (MPI) Quick ADT from one facility to another facility in your organization.

Financial Steps

Step	Action	Notes
	Perform a QADT 1. Do one of the following: • Admin > Quick ADT. • Clinical > Quick ADT. 2. Complete the fields as required. 3. Click **Search**. 4. Click **Resident Name**. 5. Complete the fields as required. NOTE If you are uncertain about the allergies, leave blank. 6. Click **OK**.	NOTE You need to determine if the Effective Date is the Original Admission date if combining or a Go live date. Enable or disable the required To/From Nursing Home / Name of other facility based on your organizations requirements. Changing resident detail in QADT updates all other resident instances that share the same Enterprise ID (MPI) for multi-facility organizations.
	Complete Medical Professional 1. Do one of the following: • Admin > Resident Profile > Medical Professionals. • Clinical > Profile > Medical Professionals. 2. Click **Modify**. 3. Use filters and select **Primary** and **Include**. 4. Click **Save**.	NOTE Medical Professionals: you see the Primary Physician if entered in Quick ADT. Add any additional physicians as required.
	Complete External Facilities 1. Do one of the following: • Admin > Resident Profile > External Facilities. • Clinical > Profile > External Facilities. 2. Click **Select**. 3. Use filters and select **Facility Name**. 4. Click **Save**.	NOTE Prioritize Pharmacy in external facilities.
	Complete Resident Identifiers 1. Admin > Resident Identifiers. 2. Click **Edit All**. 3. Type **Resident Identifier**. 4. Click **Save**.	

Step	Action	Notes
	Complete Census/Rates 1. Admin > Census/Rates. 2. Click **Edit**. 3. Complete the fields as required. 4. Click **Save & Next**. 5. Complete the fields as required. 6. Click **Save**.	**NOTE** The source facility name should be added to the destination facility's to/from location.
	View Miscellaneous 1. Do one of the following: • Admin > Misc. • Clinical > Misc. 2. Click **Misc**. 3. Use filters and select **Document Name**. **NOTE** The document downloads to your computer. Locate document and upload at destination facility.	**WARNING** Documents saved in Misc can not copy with MPI. **NOTE** Consider attaching order attachments to the order using the files link. If you are using Document Manager, you can use Cross Facility Documentation.
	Complete the rest of the Financial chart following organizations procedures.	

Clinical Steps

> **NOTE**
> The chart below indicates what Clinical information transfers with the resident. It is recommended to review all detail for accuracy and update and save changes.

Step	Action	Notes
	Standard (Legacy) Allergies	Standard allergies can be viewed but not copied to the destination facility.
	Orders	The MPI process for copying orders includes creating a queue from current and discontinued orders in source facility. • Estimate 30 minutes per resident depending on number of orders.
	UDA	If locked in source facility, a new UDA is created, without history and must be completed.
	Care Plan	UDA can populate Tasks, Care Profile, Care Plan, Kardex.
	Complete the rest of the chart following organizations procedures.	

Master Patient Index (MPI) Documentation

Managing MPI Clinical Documentation (Historical Records)

Master Patient Index (MPI) Clinical Documentation setup allows you to select the type and duration of historical records that can be accessed for residents.

Historical records are available when a resident has clinical documentation in the Customer Relationship Management (CRM) CRM module and is admitted to a facility, or a resident transfers between facilities in a multi-facility organization.

NOTE
Assessments in CRM only appear in historical records if the resident is waitlisted. After the resident is admitted, the assessments are available in the Clinical and Admin tabs of the resident's chart.

After setup is complete, a filing cabinet icon appears in a resident's chart and when clicked shows historical documentation with the option to view, copy, renew, or print, depending on the module and security.

Steps

1. Management Console > Standards > Care Management > MPI Clinical Documentation Configuration (Historical Records).
2. Click **New**.
3. Complete the fields as required.
4. Click **Save**.

More information

- Historical records in the Tasks tab are only available if the same Task Library is in use in both facilities.
- It is recommended to review all options even if modules aren't in use.

Master Patient Index (MPI) Facility to Facility Transfer

Master Patient Index (MPI) allows you to share resident details across facilities when you complete a resident transfer to another facility.

If enabled, the following resident details can be included. You can access these items in the **filing cabinet** icon in the resident record. For more information, see Managing MPI Clinical Documentation (Historical Records) [8].

- Resident Demographics - Automatically copy when you add a resident or complete a QADT.

  NOTE
  Resident photo, preferred name and Medicaid number are not included.

- Medical Diagnosis
- Allergies
- Immunizations
- Weights and Vitals
- Progress Notes
- User Defined Assessments Variable
- Care Plan variable
- Tasks
- Orders
- Minimum Data Set (MDS)

- MMQ

eMar Backup

What is eMAR Backup?

eMAR Backup is a process to create a paper image of the electronic Medical Administration Records (MAR) and Treatment Administration Records (TAR) for a facility. The paper images serve as a backup for these records when events disrupt access to the PointClickCare eMAR application. For example, power disruption, loss of internet service, etc. When access is disabled, you can print the paper images and staff can use them to document administration of the required medications and treatments to residents. The printed paper image shows 7 days' worth of space for administration documentation: 3 previous dates, the current date and 3 future dates.

eMAR Backup Process

In the event of a power loss, you can access paper mars using the emar backup process. Each facility provides a computer designated as the eMAR backup computer. This computer must be attached to a backup power supply and have internet access. In addition, a printer must be provided and attached to the backup power supply.

To print the MAR and TAR reports, the computer needs a copy of Adobe Reader installed. Adobe Reader is available for free from Adobe Corporation and is available at www.adobe.com.

Secure File Exchange is the eMAR Backup process. The backup process uses a software utility called Task Scheduler that comes with the Windows operating system already installed on the computer. Every hour,

1. a backup is performed.
2. the collection of the backup files is put into a zip file.
3. the zip file is pushed through an encrypted channel, directly to your backup computer where a backup agent is installed.

The process is configured to store the eMAR backup files on the eMAR backup computer hard drive. Older files are automatically purged to avoid filling up the disk space. The configuration is set to keep 8 hours of backups on the computer.

If your organization has not transitioned to Secure File Exchange, the eMAR Backup process downloads the files from PointClickCare's servers to the eMAR backup computer using an SFTP (file transfer protocol) process. This process is repeated **every hour** using a software utility called Task Scheduler that comes with the Windows operating system already installed on the computer. PointClickCare supplies the software needed to perform the SFTP process.

When to use the eMAR Backup files

Use the eMAR Backup reports whenever service to the PointClickCare eMAR application is disrupted and it is uncertain when it will be restored, or if it is known that the disruption will last long enough that the normal process for administering and dispensing MARs and TARs in the facility will be affected.

Disruptions are commonly caused by power outages or loss of Internet service, but could occur under other unique circumstances that prevent facility staff from accessing the eMAR application. It is recommended that each facility include criteria defining when the eMAR backup reports should be accessed and used in their facility's emergency plans. Also, it is highly recommended to put in place an audit process to identify how often staff will check that the eMAR Backup is working.

How to access and print eMAR Backup Reports

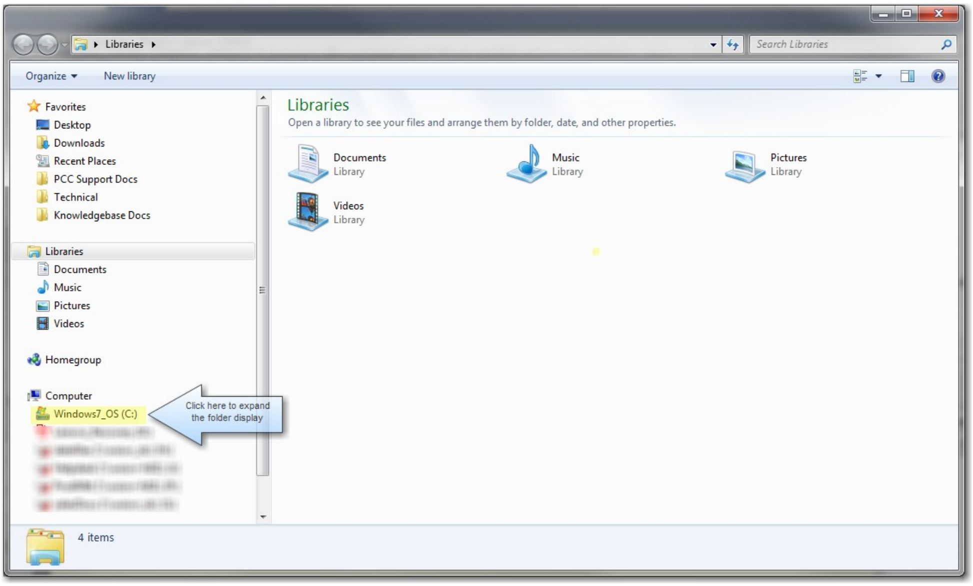
The eMAR backup process creates and uses a common directory structure on all eMAR backup computers. While unlikely, it is possible that a facility could customize the eMAR backup process and modify that directory structure. It is recommended that each facility verify the directory structure on the eMAR backup computer and note any differences found between the directory structure described in the following instructions and those that are in place on the facility's eMAR backup computer. Do not wait until an emergency situation arises to discover you are cannot locate the eMAR backup reports on the computer.

The common directory structure used for the eMAR backup process is shown in the screen shot that follows. The folder "downloads" that contains the eMAR backup reports is found at the location "C:\eMARBackup\downloads" as shown here:

To verify that this is the location of your eMAR reports, perform the following steps on the eMAR backup computer:

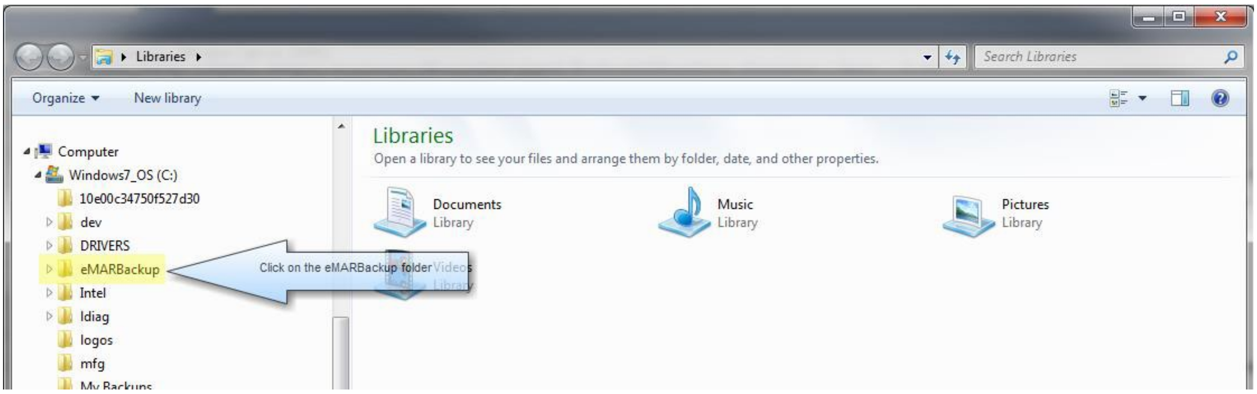
1. Open Windows Explorer from the Toolbar.

2. Select the Local Disk where emarbackup is installed – normally C:\



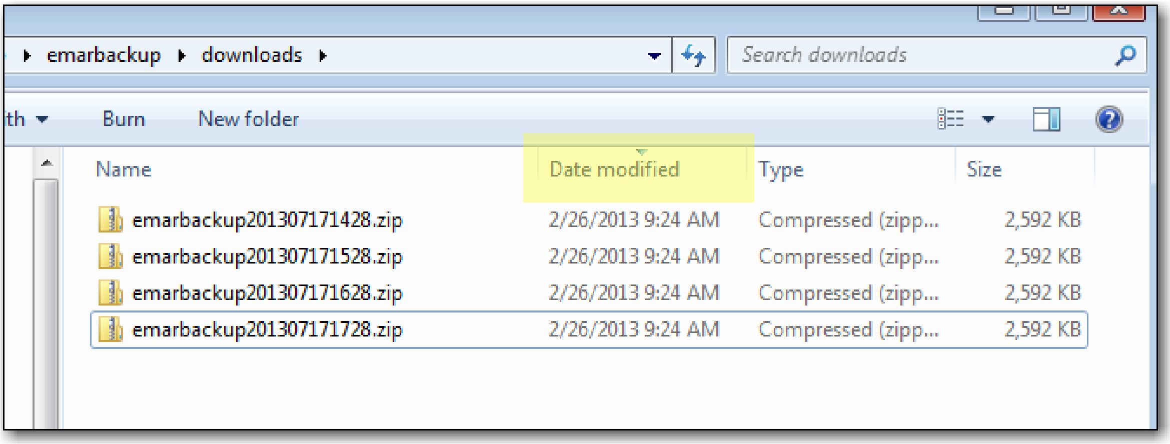
Note the highlighted area and the arrow to the right of it. Your screen does not have the highlight or the arrow, but it does have a location that is named "eMARBackup**". If no such folder exists, then your facility's eMAR backup process has been modified or customized, or the computer being viewed is not the eMAR backup computer - contact your IT staff to locate the eMAR backup location**.

3. Click on that folder name to expand the directory tree and you see something similar to this:



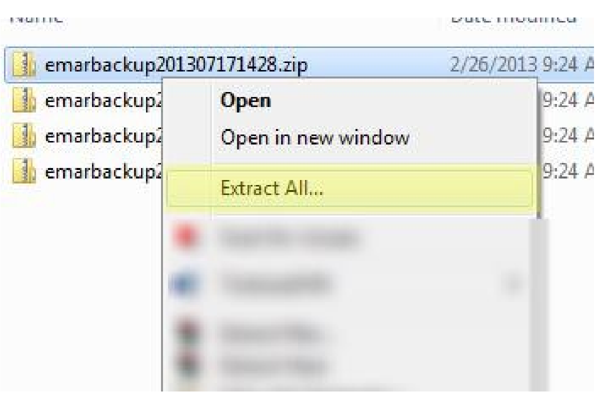
The arrow on the screen shows the folder where the eMAR backup files are stored.

4. Double clicking on the downloads folder changes the screen like this:

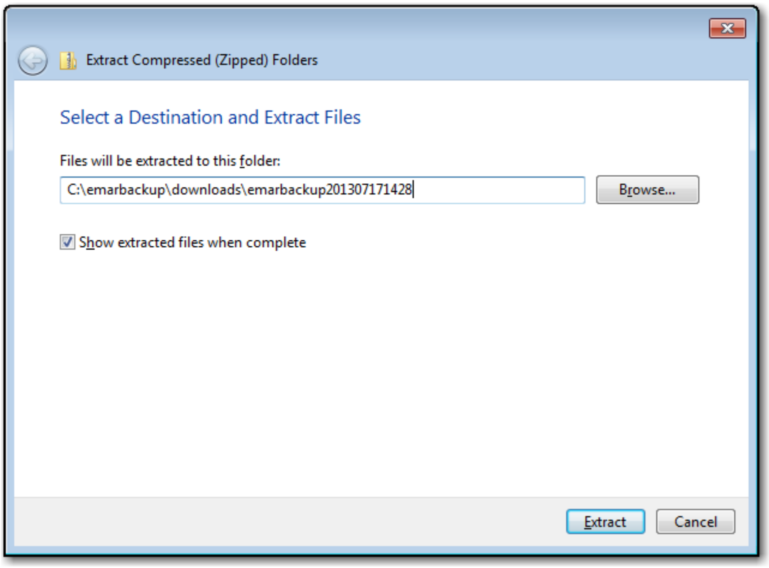


The most recent file appears at the top of the file list when you click on the Date Modified column. You can also use the file name as a guide to determine the most current file. The files are named as follows: emarbackupyyyymmddhhmm.zip where "yyyy" is year, "mm" is month, "dd" is day, "hh" is hour, and "mm" is minutes. Select the file created most recently.

5. After the correct file is identified, you can often just double click on the file name and it opens. If that does not work, right click on the file name and click **Extract**.



6. Select the box titled "Show extracted files when complete".



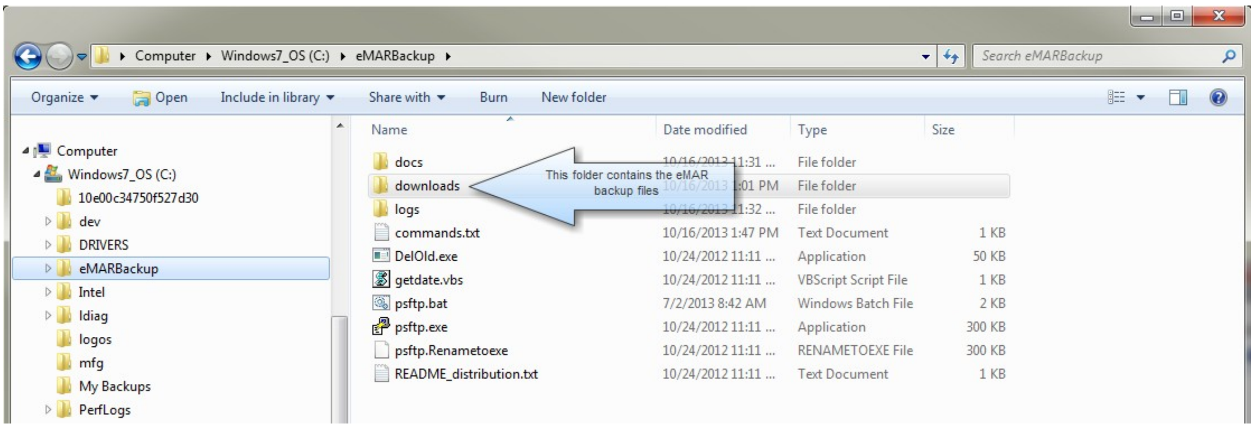
7. You see a list of MAR and TAR files for the facility that were stored in the zip file that was opened. The files are sorted and sequenced by Unit and Floor if those configurations were used when setting up the facility.
8. Double-click the file to open it in Adobe Reader where it can be viewed and printed.

Files should be distributed accordingly to the staff administering the MAR's and TAR's. Staff can record their actions on the reports during the time the PointClickCare system is not available. When access to the PointClickCare system is restored, the actions recorded by staff must be entered/transcribed into the PointClickCare eMAR system to bring those records up to date.

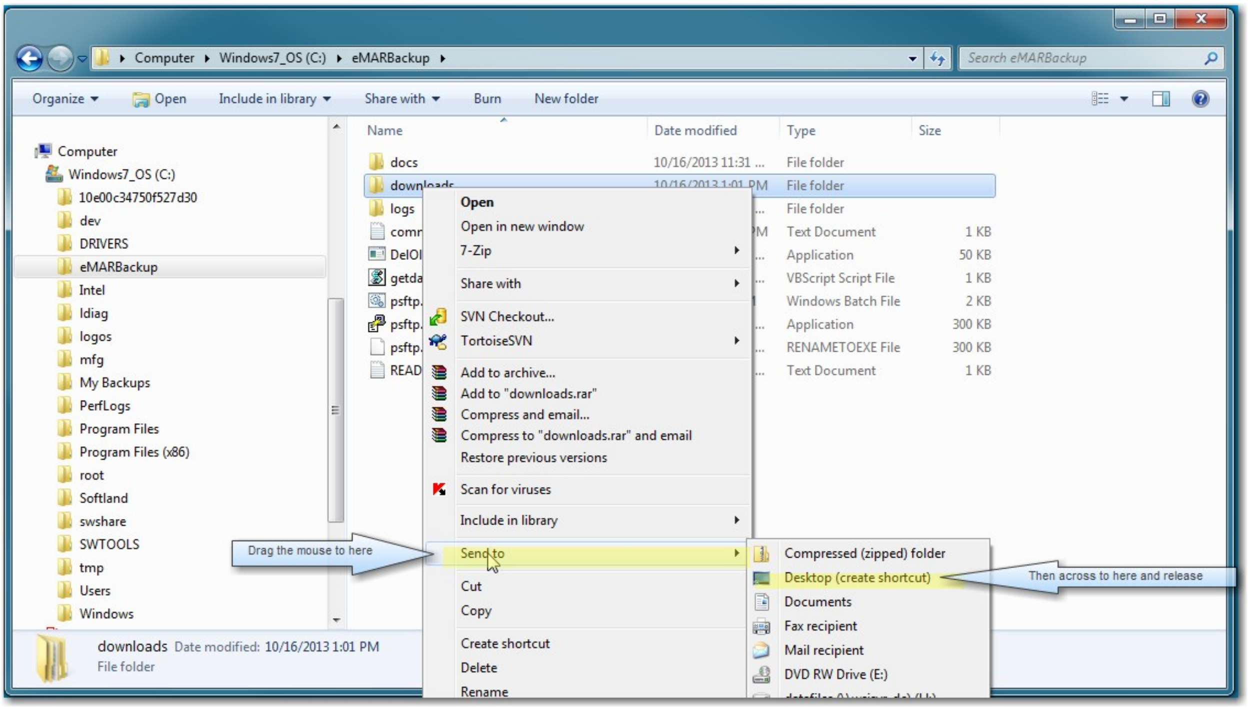
How to create a shortcut to the eMAR Backup folder

Following the steps just listed can be a challenging exercise when not being done often. To reduce the number of steps needed to open or locate the eMAR documents, you can create a short cut to the folder place it on the computer's desktop. Follow these steps only one time to create the shortcut, rather than every time as the steps listed above require.

1. Follow steps 1 through 4 from the steps listed above. This screen appears:



2. Place your mouse on the "downloads" folder (pointed to by the arrow in the above screen shot) and right click on it. The screen look like this - highlights and arrows are added to make the picture clear:



3. Drag your mouse down to the **Send to** menu selection. A menu opens to the right. Drag the mouse to the **Desktop (create shortcut)** selection and click one time to automatically create a shortcut icon on your computer's desktop. The icon looks like this:

4. Place your mouse over the icon you just created and **right click** on it. Select "Rename" from the menu that appears and rename the folded to "eMAR Backup Printouts" (or something similar). In the future, if you need to view and print the reports, double click on the icon and the following appears:

If you refer to the previous list of instructions, you see you are starting at instruction number 5 in the list. Setting up the short cut has eliminated steps 1-3 of the previous list.

NOTE

After the short cut is set up, there is no need to repeat the steps to recreate it. The shortcut remains on your desktop until you delete it. Double click it whenever you need to access the reports and follow steps 5 - 8 of the instructions in the previous section.

PointClickCare Companion

Security for PointClickCare Companion

The following are security permissions related to PointClickCare Companion.

To manage security permissions, see Creating Security Roles in the Help Center.

NOTE
Access to tasks and medications in the PointClickCare Companion mobile app is determined by Position-Based Workflow Configuration. It is not based on Point of Care (POC) or eMAR security permissions or roles.

Security Permission	Access Level
Major Module = EMC	
Enable Companion	Y - Access to enable PointClickCare Companion in the Management Console.
Major Module = Clinical	
PointClickCare Companion Setup:	
PointClickCare Companion Configuration	N - No access to PointClickCare Companion Configuration. R - Access to view PointClickCare Companion Configuration settings. A - Same as above. E - Access to enable PointClickCare Companion in a facility and edit PointClickCare Companion Configuration settings. D - Same as above.
Position-Based Workflow Configuration	N - No access to Position-Based Workflow Configuration. R - Access to view positions. A - Access to add positions. E - Access to edit positions. D - Access to remove positions.
Companion House Tasks Report	Y - Access to the House Tasks Audit Report.
Task Operations:	
House Task Scheduling	Y - Access to House Task Scheduling.
Major Module = Mobile App	
PointClickCare Companion Mobile App	Y - Access to the PointClickCare Companion mobile app.

Enabling PointClickCare Companion

To enable PointClickCare Companion, enable Task Documentation, or enable both Task Documentation and Order Documentation. You must enable Task Documentation to enable Order Documentation. You cannot enable Order Documentation only. The options available are based on your organization's Point of Care (POC) and eMAR subscriptions.

Steps

To enable in a single facility organization

1. Clinical > Setup > PointClickCare Companion Configuration.
2. Next to Task Documentation, select **Enabled**.
3. Next to Order Documentation, select **Enabled** if needed.
4. Click **Save**.

To enable in a multi-facility organization

1. Management Console > Standards > Care Management > Enable Companion.
2. Next to a facility, in the Task Documentation column, select **Enabled**.
3. In the Order Documentation column, select **Enabled** if needed.

Completing PointClickCare Companion Configuration

After PointClickCare Companion is enabled, you can complete the configuration settings for the PointClickCare Companion mobile app.

> **NOTE**
> In the PointClickCare Companion mobile app, medications show in real time. Tasks update every 5 minutes. You can change the task setting on your mobile devices in Settings > Companion > REFRESH INTERVAL: Service Tasks.

Steps

1. Clinical > Setup > PointClickCare Companion Configuration.
2. In the **General Configuration** section, complete the fields as required.
   - **App Timeout** - Select option. Determines the number of minutes of inactivity before being logged out of the app. Unsaved documentation is lost.
   - **Allow Use of Unlock PIN** - Select option. If set to Yes, your staff are prompted to set a numeric PIN the first time they log into the PointClickCare Companion mobile app. If they are timed out because of inactivity while using the app, they can enter their Unlock PIN to return to the screen they were working in. Documentation previously entered is saved.
3. Click **Save & Next**.
4. In the **Task Documentation** section, confirm the settings are correct.

   > **NOTE**
   > If a setting is changed in PointClickCare Companion Configuration, it automatically changes in POC General Configuration, and the reverse is also true.
   >
   > The Grace Period and Standard Responses settings are different than in POC General Configuration.

5. Click **Save & Next**.
6. In the **Order Documentation** section, confirm the settings are correct.

   > **NOTE**
   > If a setting is changed in PointClickCare Companion Configuration, it automatically changes in eMAR Configuration, and the reverse is also true.

7. Click **Save**.

Completing Position-Based Workflow Configuration

After PointClickCare Companion is enabled, you can select the information that positions can access in the PointClickCare Companion mobile app. Access to tasks and medications within the PointClickCare Companion mobile app is determined by positions and how they are configured. It is not based on Point of Care (POC) or eMAR security permissions or roles.

You can also set up a position to oversee or fill 1 or more roles. For example, an RN can access Med Tech and Caregiver information in the PointClickCare Companion mobile app.

WARNING
If you use *Point of Care* (POC) and *eMAR*, this screen is linked to POC Assignment Setup and Administration Record Assignment Setup.

- If you add a position here, it appears in POC Assignment Setup. If you add an administration record to a position here, it appears in Administration Record Assignment Setup.
- If you remove an administration record from a position here, it is removed from Administration Record Assignment Setup if it is not tied to any other position.
- If you remove a position here, it is removed from POC Assignment Setup and the administration record(s) tied to the position is removed from Administration Record Assignment Setup if it is not tied to any other position.

NOTE
If a position appears as **Inactive**, you must associate the position with a department.

For more information, see Mapping Departments and Positions in the Help Center.

Steps

1. Clinical > Setup > Position-Based Workflow Configuration.
2. Click **Add Position(s)**.
3. In the **Positions** section, select 1 or more positions and select if the position can oversee or fill other roles.
4. Do one of the following:
   - If the position only oversees or fills other roles, and does not need assignments set up, click **Save** to close the screen. No further action is required.
   - If the position needs assignments set up, click **Next** to move to the Assignments section.
5. In the **Assignments** section, select a shift and assignment group and click **Add**. Repeat this step, if needed.
6. Click **Next**.
7. In the **Task Documentation** section, select an option. If Yes, the position can access tasks assigned to other positions.

   NOTE
   Select **Yes** if the position is set up to oversee or fill other roles.

8. Click **Next**.
9. In the **Order Documentation** section, select 1 or more administration records and a default workflow, if required.
   - **Individual Administration** - Select to allow the position to document administrations.
   - **Individual Observation with Order Details** - Select to allow the position to document the observation of self-administration.
10. Click **Save**.

Logging In and Out of the PointClickCare Companion Mobile App

You can log into the PointClickCare Companion mobile app on your mobile device to document tasks, medications, and treatments.

> **NOTE**
> To use the PointClickCare Companion mobile app, you must have the security permission and have a Department, Position, and Initials entered in Security Users.
>
> If Unlock PIN is enabled in your facility and you are timed out because of inactivity, you can use an Unlock PIN to return to the screen you were working in. Documentation previously entered is maintained.

> **WARNING**
> If Unlock PIN is not enabled in your facility and you are timed out because of inactivity, you are automatically logged out and unsaved documentation is lost.

Logging out of the PointClickCare Companion mobile app ensures your session is securely closed.

Steps

To log in

1. On your mobile device, open the PointClickCare Companion mobile app.
2. Type your organization code.
3. Tap **NEXT**.
4. Do one of the following:
   - In the Mobile Login screen, type a period and your username, then type your password.

     > **NOTE**
     > Use your alternate password/PIN (if set up) or your password. For example, if you previously used Point of Care (POC), use the same password.

   - In the login screen for your organization, type your corporate login credentials.
5. Tap **Sign In**.

NOTE
If Unlock PIN is enabled, after logging in for the first time, you are prompted to create an Unlock PIN. You can edit your Unlock PIN or PIN preference by tapping **Settings** and selecting **Unlock PIN**.

If Display On Login is enabled, you are prompted to confirm your assignment settings 1 time per day and shift.

To **log out**

1. Tap **Settings**.
2. Tap **Log Out**.

PointClickCare Companion Mobile App

This quick reference guide contains items required to navigate the PointClickCare Companion mobile app.

NOTE
You can manually refresh while viewing the To Do list, resident list, resident screens, and Updates section. Pull down and release to refresh and see the most current information.

To Do List

Item	Description
+ icon	Tap to access the following options: **Create Alert** - Tap to create an alert for a resident. **Document Unscheduled Task** - Tap to document an unscheduled task for a resident. Service Time Tracking and Unscheduled Tasks must be enabled.
Search field	Type to search for a task name to see a list of residents who have that task scheduled for the shift. For example, a Bathing task. **NOTE** When searching, pull down and release to refresh is unavailable.
Filter options	Tap to sort the list. You can select more than 1 filter. **NOTE** If house tasks are used in your facility, a House Tasks filter is available.
Arrow icons	Tap to expand or collapse a section.
Resident tile	Tap to document an item for a resident.
Group tile	Tap to document an item for a group of residents.
Documented tile	Tap to view or strike out documentation, or add a new entry (QShift and PRN only).

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>Dock section</td><td>
Appears on most screens.
To Do - Tap to access the To Do list.
Residents - Tap to access the resident list.
Updates - Tap to view clinical alerts, bulletins, clinical communications, and ADT information.
Settings - Tap to

open Change Assignment to change the facility, date, shift, or assignment. You can also enable or disable Display on Login. If Display On Login is enabled, you are prompted to confirm your assignment settings 1 time per day and shift.
NOTE
If your position is set up to oversee or fill another role, you can change your position. The position is saved the next time you log in.
If you only document tasks, you can filter by Assignment or Unit. Select All to view tasks and updates for all residents.
change the text size.
open external links.
change your password.
NOTE
If you need to change your alternate password/PIN, contact your System Administrator.
turn Unlock PIN on or off, and change or reset your Unlock PIN.
log out.

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

Resident List

Item	Description
Barcode icon	Tap to scan a resident barcode.
Search field	Tap and type a name to search for a resident.
Location and Name options	Tap to sort residents by location or name.

Item	Description
Resident tile	Tap to access the following options: **Search Icon** - Tap to search for information in the Updates tab, or for a task in the To Do and PRN tabs. **+** - Tap to access the following options: • **Apply to All** - Tap to document 1 response for all items for the resident. • **Create Alert** - Tap to create an alert for the resident. • **Document Unscheduled Task** - Tap to document an unscheduled task for the resident. Service Time Tracking and Unscheduled Tasks must be enabled. • **External Links** - Tap to access external links. **Info** - Review resident information. For example, Code Status, Allergies, Special Instructions, Kardex, and Diet. **NOTE** To view the resident's care plan, tap Kardex, then tap Care Plan. **Updates** - Tap to view clinical alerts, clinical communications, and ADT information for the resident. **To Do** - Tap to document an item for the resident. **PRN** - Tap to document a PRN item for the resident.

Documenting in the To Do List in the PointClickCare Companion Mobile App

In the PointClickCare Companion mobile app, you can document tasks, medications, and treatments in the To Do list. The To Do list is in chronological order and grouped by items for a single resident or group of residents.

Timed and Monthly Duration items can only be documented 1 time. *QShift* and *PRN* items can be documented multiple times. For example, you document a toileting task or a PRN medication and need to document it again later in the shift.

By the end of your shift, all scheduled items should be documented (green).

CAUTION

To prevent missed administrations, order supplies and pending orders must be managed in PointClickCare before documenting in the PointClickCare Companion mobile app.

If medication barcode scanning is enabled, medications received from the pharmacy must be properly linked before you can scan them.

> **NOTE**
> If you have Quick Entry Groups set up for *Point of Care* (POC), they are not used in the PointClickCare Companion Mobile App. Items are automatically grouped using the following logic:
>
> - Items are sorted by time.
> - If the same item exists for more than 1 resident at the same time, it is grouped.
> - For the remaining items, if multiple items exist for the same resident and they are scheduled at the same time, they are grouped.

Steps

To document for a resident

1. To Do > select 1 or more **filters**, if needed.

   > **NOTE**
   > A COVID filter appears when a COVID-19 laboratory test is ordered with a point-of-care device selected. Open a resident's COVID lab order to access their barcode.

2. Select a **task**, **group of tasks**, or **MAR**.

   > **CAUTION**
   > To prevent missed administrations, after selecting **MAR**, tap **Pending** to review pending orders before completing your medication administration.

3. Complete the fields as required.

   > **NOTE**
   > Tap a medication to view details and supply information, warnings, and administration history.

4. Tap **Save**.

To document for more than 1 resident

1. To Do > select 1 or more **filters**, if needed.
2. Select a **group of tasks** or **MAR**.
3. Select a **resident**.
4. Complete the fields as required.
5. Tap **Save**.
6. Document for other residents as required.

> **NOTE**
> To document again on a QShift or PRN item, select the documented item and tap **New Entry** for a task or **Yes** for a medication or treatment.

To strike out documentation

1. To strike out documentation, do one of the following:
   - Select the documented task and tap **Strikeout**.
   - Tap **Reason Code** for the documented medication or treatment and tap **Strikeout**.
2. Select a **reason** and tap **Strikeout**.

Options

Below is a list of the options available to you.

Tasks

- **Apply to All: Resident Not Available/Resident Refused/Not Applicable** - If enabled, you can document 1 response for all questions within the task.
- **Instructions** - You might see Instructions in a task. They do not appear in every task.
- **Effective date and time** - You can change the date or time, if applicable.
- **Time Taken** - If Service Time Tracking is enabled, you must document your time spent completing the task.

Medications and Treatments

- **Effective date and time** - You can change the date or time, if applicable.
- **Supplementary Documentation** - If required, you are prompted to complete additional documentation. For example, pain, weight, or vitals, as well as custom prompts. If available, you can select **Use Last Recorded**.

> **NOTE**
> If Blood Sugar is required for sliding scale Insulin, after typing the Blood Sugar, the dose is calculated for you. Confirm the dose is correct before administration.

- **Partial Administration** - If enabled, you can document a partial administration for certain medications.

Documenting in the Resident List in the PointClickCare Companion Mobile App

In the PointClickCare Companion mobile app, you can document tasks, medications, and treatments in the resident list.

Timed and Monthly Duration items can only be documented 1 time. *QShift* and *PRN* items can be documented multiple times. For example, you document a toileting task or a PRN medication and need to document it again later in the shift.

By the end of your shift, all scheduled items should be documented (green).

> **CAUTION**
> To prevent missed administrations, order supplies and pending orders must be managed in PointClickCare before documenting in the PointClickCare Companion mobile app.
>
> If medication barcode scanning is enabled, medications received from the pharmacy must be properly linked before you can scan them.

Steps

1. Do one of the following:
   - Residents > select a **resident**.
   - Residents > tap the barcode icon > scan a resident barcode.
2. Select **To Do** or **PRN**.
3. Select 1 or more **filters**, if needed.
4. Do one of the following:
   - Select a **task** or **MAR**.

     > **CAUTION**
     > To prevent missed administrations, after selecting **MAR**, tap **Pending** to review pending orders before completing your medication administration.

   - Tap the barcode icon > scan a medication barcode.
5. Complete the fields as required.

   > **NOTE**
   > Tap a medication to view details and supply information, warnings, and administration history.

6. Tap **Save**.

> **NOTE**
> To document again on a QShift or PRN item, select the documented item and tap **New Entry** for a task or **Yes** for a medication or treatment.

To strike out documentation

1. To strike out documentation, do one of the following:
   - Select the documented task and tap **Strikeout**.
   - Tap **Reason Code** for the documented medication or treatment and tap **Strikeout**.
2. Select a **reason** and tap **Strikeout**.

Options

Below is a list of the options available to you.

Tasks

- **Apply to All: Resident Not Available/Resident Refused/Not Applicable** - If enabled, you can document 1 response for all questions within the task.
- **Instructions** - You might see Instructions in a task. They do not appear in every task.
- **Effective date and time** - You can change the date or time, if applicable.
- **Time Taken** - If Service Time Tracking is enabled, you must document your time spent completing the task.

Orders

- **Effective date and time** - You can change the date or time, if applicable.
- **Supplementary Documentation** - If required, you are prompted to complete additional documentation. For example, pain, weight, or vitals, as well as custom prompts. If available, you can select **Use Last Recorded**.

> **NOTE**
> If Blood Sugar is required for sliding scale Insulin, after typing the Blood Sugar, the dose is calculated for you. Confirm the dose is correct before administration.

- **Partial Administration** - If enabled, you can document a partial administration for certain medications.

Documenting Behaviors and Linking to Medication Administration in the PointClickCare Companion Mobile App

Using the Behavior Monitoring & Interventions task, you can track behavior episodes from the point of observation through attempted interventions and outcomes. You can also view previously documented behaviors and link behaviors to medication administration.

> **NOTE**
> To view and link behavior documentation, the medication must have the behavior prompts selected in Supplementary Documentation.
>
> - Behavior observed (Yes/No)
> - Behavior Look Back

Steps

To document a behavior

1. Do one of the following:
   - Residents > select a resident.
   - Residents > tap the barcode icon > scan a resident barcode.
2. Select **To Do** or **PRN**.
3. Select the **Behavior Monitoring & Interventions** task.
4. Select 1 or more behaviors.

   > **NOTE**
   > Based on configuration, behaviors appear in a detailed or category view.

5. Select the attempted interventions and outcomes.
6. Tap **Save**.

To link a behavior to medication administration

1. Do one of the following:
   - Residents > select a resident.
   - Residents > tap the barcode icon > scan a resident barcode.

2. Select **To Do** or **PRN**.
3. Do one of the following:
    - Select **MAR**.

    > **CAUTION**
    > To prevent missed administrations, after selecting **MAR**, tap **Pending** to review pending orders before completing your medication administration.

    - Tap the barcode icon > scan a medication barcode.
4. Next to **Was a behavior observed?**, select **Yes**.
5. Tap **Link Behavior Documentation**.
6. Select the documentation and tap **Link**. Repeat if needed.
7. Tap **Continue**.
8. Complete the progress note.
9. Tap **Continue**.
10. Tap **Save**.

Documenting Unscheduled Tasks in the PointClickCare Companion Mobile App

If Service Time Tracking and Unscheduled Tasks are enabled, you can document a task that is not in a resident's task list. For example, a laundry task.

Documenting unscheduled tasks in the PointClickCare Companion mobile app assists with tracking all care provided to a resident.

Steps

1. Do one of the following:
    - To Do > tap **+** > tap **Document Unscheduled Task** > select a **resident**.
    - Residents > select a **resident** or scan a resident barcode > tap **+** > tap **Document Unscheduled Task**.
2. Select a **task**.
3. Complete the fields as required.
4. Tap **Save**.

    The unscheduled task appears in the Documented section.

Creating a House Task Library

House tasks allow your care staff to document non-resident tasks in the PointClickCare Companion mobile app. For example, emptying the trash or cleaning the common areas.

To use house tasks, you must first create and enable a house task library.

Steps

To create a house task library

1. Do one of the following:
    - Single facility: Clinical > Setup > Task Library.
    - Multi-facility: Management Console > Standards > Care Management > Task Library.
2. Click **New**.
3. Complete the fields as required.

4. Next to Library Type, select **House Task Library**.
5. Click **Save**.

To enable a house task library

1. Clinical > Setup > Task Configuration.
2. Select the house task library.
3. Click **Save**.

For more information, see Creating House Tasks [27].

Creating House Tasks

House tasks allow your care staff to document non-resident tasks in the PointClickCare Companion mobile app. For example, emptying the trash or cleaning the common areas.

You must create house tasks in a house task library. For more information, see Creating a House Task Library [26].

Steps

1. Do one of the following:
    - Single facility: Clinical > Setup > Task Library.
    - Multi-facility: Management Console > Standards > Care Management > Task Library.
2. Next to the house task library, click **tasks**.
3. Click **New**.
4. Complete the fields as required.
5. Click **Next**.
6. Complete the fields as required.
7. Click **Save**.

Configuration Options

Below is a list of the configuration options available to you.

- **Description** - Type the name of the house task.
- **Lock Description** - Select to prevent the description from being changed in House Task Scheduling.
- **Instructions** - Type informational prompts for care staff, if needed.
- **Position** - Select option.
- **Personalization Required** - Not applicable.
- **Documentation Required** - Not applicable.
- **Companion Documentation Required** - Select option.
- **Follow Up Questions** - Click **add questions** and select a question from the Follow Up Question Library or create a new follow up question. For more information, see Creating Follow Up Questions.
- **Icon** - Select option.

> **NOTE**
> Icons only show in the house task library. They do not show in the PointClickCare Companion mobile app.

- **Planned Position to Perform Task** *(if Service Time Tracking is enabled)* - Select option.
- **Planned Time to Perform Task** *(if Service Time Tracking is enabled)* - Select option.
- **Track Actual Time to Complete Task** *(if Service Time Tracking is enabled)* - Select to require care staff to document their time spent completing the task.

- **Where is documentation used?** - Not applicable.
- **Simplified (POC) Frequency** - Select option.
- **Frequency** - Not applicable.
- **Scope** - Select option.

For more information, see Managing House Tasks [28].

Managing House Tasks

After you create house tasks in your house task library, you can manage them in House Task Scheduling. This is similar to managing standard tasks in a resident's chart. You can scope house tasks by facility, assignment, unit, or floor.

Steps

1. Clinical > Setup > House Task Scheduling.
2. Click **Add Task**.
3. Complete the fields as required.
4. Click **Save**.
5. Next to the house task, click the **arrow** to expand.
6. Click the **pencil icon** and update the fields as required. For example, add a position or change the frequency.

   > **NOTE**
   > Changes made in House Task Scheduling do not flow to the house task library.

7. Click **Save**.

The house tasks can now be documented in the PointClickCare Companion mobile app.

> **NOTE**
> House task documentation is not included in reports or dashboards at this time.

Practitioner Engagement Mobile App

Security for Practitioner Engagement Mobile

The following are security permissions related to Practitioner Engagement Mobile. To manage security permissions, see Creating Security Roles.

Security Permission	Access Level
Major Module = Clinical	
Enhanced Orders Management:	
Create an Order	Y - Access to add order.
Discontinue an Order	Y - Access to discontinue an order.
Hold an Order	Y - Access to place ordersorders on hold.
Resume an Order	Y - Access to resume ordersorders.
Orders Pending Signature	Y - Access to Electronically Sign Telephone Verbal/Phone orders.

Security Permission	Access Level
Orders Pending Review	Y - Access to view the Order Reviews due for signing.
Complete Review	Y - Access to Complete and sign an Order Review.
Mark All	Y - Access to Mark All orders for signing.
ePrescribe	Y - Access to create an order and electronically sign.
Clinical tabs:	
Progress Notes	Allows a medical professional to create progress notes in the mobile app. N - Do not see Progress Notes other than through the Chart Summary. R - See Progress Notes module. A - Plus (+) icon shows to add Progress Notes. E - Edit link shows to modify Progress Notes. D - Del Link shows.
Misc	Allows a medical professional to view documents in the mobile app that are uploaded to the resident's chart in PointClickCare. N- No access to the Documents icon. R - Access to view all documents uploaded to the resident's chart. A - Same as above. E - Same as above. D - Same as above.
Major Module = Mobile App	
Practitioner Mobile Application	Y - Access to the Practitioner Engagement Mobile App

Completing Practitioner Engagement Configuration

This screen contains configuration settings for Practitioner Engagement.

NOTE
For multi-facility organizations, some configuration options require a 2 step process.

Steps

1. Do one of the following:
   - Single Facility: Clinical > Setup > Orders Configuration.
   - Multi-facility: Management Console > Standards > Care Management > Practitioner Engagement Application.
2. Complete the fields as required.
3. Click **Save**.

Configuration Options

Below is a list of the configuration options available to you.

- **Enable One Signature Workflow** - Select option. If enabled, allows practitioners to sign non-controlled drug orders for multiple patients at one time in the Practitioner Engagement mobile application. Controlled drugs must be signed individually.
  - In addition, multi-facility organizations must be enabled in each individual facility.

Clinical > Setup > Orders Configuration > **Enable One Signature Workflow?** - select Yes.

> **WARNING**
> Before enabling, ensure that your facility is located in a state that allows batch order signing.

- **Enable One Signature Review** - Select option. If enabled, allows practitioners to sign order reviews for multiple patients at a time.
  - In addition, multi-facility organizations must enable in each individual facility.
    Clinical > Setup > Orders Configuration > **Enable One Signature Review Workflow?** - select Yes.
- **Custom session timeout** - Select option. Only available for multi-facility organizations at the Management Console. Allows you to configure the custom session timeout for Touch ID or Facial recognition for your organization. Touch ID or Facial recognition allows you to return to your session if you are timed out, bringing you back into the app where you left off.
- **Enable Biometric Authentication** - Select option. If enabled, allows practitioners to use biometrics on iOS devices to log in and sign orders and progress notes.

Setting up Medical Professional Signing Others Orders

CRM Availability & Occupancy is enabled by a PointClickCare representative.

Organizations must complete an addendum to the *Master Subscription Agreement for Practitioner Engagement*.

After enabled, for Medical Professionals who have a security role with Care Provider Access set to Yes and the 'Medical Professional Type' is of a type that requires an NPI#, you must determine which professional relations can electronically sign for orders prescribed by another practitioner.

> **IMPORTANT**
> When Clinical Care Provider Access = No and the 'Medical Professional Type' is of a type that requires an NPI#, this MP can sign for any orders regardless of relationship to the resident. No further set up is required for these Medical Professionals.

> **NOTE**
> If EPCS is enabled, Controlled drugs cannot be signed for another practitioner. These must be signed individually by the prescriber.

Steps

1. Admin > Setup > Pick Lists > Professional Relations.
2. Click **edit** next to the professional you want to give permission to.
3. Check to Sign for other Medical Professionals and click **save**.
   - The Primary physician group is given permission to Sign for other Medical Professionals. This option cannot be changed.
4. Ensure those Medical Professionals are listed with the correct relation in the profile tab of the residents they want to sign for.

Getting started with the Practitioner Engagement (PE) Mobile

The Practitioner Engagement (PE) Mobile mobile app allows medical professionals to access patient charts and manage orders on a mobile device.

Steps

1. In the App store (iOS) or Play store (Android), search for Practitioner Engagement. Select the app and tap **Install**.
2. Log in with your PointClickCare credentials and set up your biometrics for Touch or Face ID, if available.
3. Explore the PE mobile app.

View alerts in the Notification Stream	**View a patient's chart and update orders**	**Sign orders in a batch**

Navigating the Patient's Chart in Practitioner Engagement (PE) Mobile Quick Reference Guide

This screen contains items required to navigate the patients chart.

Medical Professionals can view patient information, orders, results, progress notes and recent vitals from the patient's chart in Practitioner Engagement.

Item Name	Description
Documents	You can view all documents that are uploaded to the Documents tab in PointClickCare. Use the Search or Filters to locate documents.
Patient Information	Shows the patient's image, name, facility, date of birth, age and primary physician. Tap the patient's image to view the Notification Stream and see new alerts specific to this patient.
Tabs	• Facts - Patient information such as Allergies, Code Status, Primary Active Diagnosis and more. • Orders - A list of the patient's orders. Tap to filter or use the Search. Tap any order to see details about that order, including last administration information. • Results - Access to vitals, laboratory, and radiology results. Tap to see a full list of recent vitals or details about the most recent result. You can also view previous results or vitals. **NOTE** You can view full laboratory result reports and mark laboratory results as reviewed. A check mark icon on a lab result indicates that lab is marked as reviewed. Swipe left on a lab report to Mark as Reviewed. A paper clip icon indicates a printable laboratory report is available. Select the lab and tap the **paper clip icon** to view the report. If you tap Mark as Reviewed by mistake, you can tap **Mark as Unreviewed**. • Notes - Access to the patient's progress notes. Use the search options to locate specific notes. You can view, create new, and follow up to existing notes.
Rx	Tap **Rx** to manage orders.
Dock	The dock is always available. • Home - You can view clinical alerts for your patients. For example, abnormal laboratory and radiology results and eINTERACT Change in Condition alerts, if enabled. • Patients - Returns you to the patient list. • Sign - Sign orders and complete order reviews. • Conversations - If enabled, you can view and respond to Secure Conversations. • ellipsis- Access to the App Tour, Enable or Disable Touch ID, Notification Settings, and Logout.

Signing Orders in the Practitioner Engagement (PE) Mobile Quick Reference Guide

This quick reference guide provides the steps required to Sign Orders in the Practitioner Engagement Mobile App.

You can view and electronically sign orders added in the PointClickCare web application that are awaiting signature. With appropriate setup, you can sign for orders prescribed by another practitioner.

If One Signature Workflow is enabled, you can sign for multiple patient's orders at a time.

> **NOTE**
> Controlled drugs can only be signed by the prescriber and cannot be signed using One Signature Workflow.

Step	One Signature Workflow to sign orders for multiple patients	Signing multiple orders and controlled drugs for a single patient
	1. In the dock, tap the **Sign** icon. 2. Tap **Sign Orders**.	1. In the dock, tap the **sign** icon. 2. Tap **Sign Orders**.
	1. Tap **One Sign**. **NOTE** Tap **Others** to view and sign for residents with controlled drugs. 2. Select patients or tap **Mark All**. 3. Tap **Next**. **NOTE** If Medical Professionals can sign orders prescribed by others, tap the filter icon to add prescribed by others.	1. Tap a patient tile. **NOTE** If Medical Professionals can sign orders prescribed by others, tap the filter icon to add prescribed by others.
	1. Select individual orders or tap **Mark All**. 2. Tap **Sign X of X Orders**.	1. Select individual orders. **NOTE** If EPCS is enabled, select RTS (Ready To Sign) for each controlled drug. 2. Tap **Sign**.
	1. Type your password or device token. 2. Tap **Ok**.	1. Type your password or device token. 2. Tap **Ok**. **NOTE** After tapping Ok, you are brought to the next patient's orders to be signed.

> **NOTE**
> You can also sign orders from the patient's chart. Tap **RX** and tap **Sign**.

Completing Order Reviews in Practitioner Engagement (PE) Mobile

You can complete Order Reviews in the Practitioner Engagement Mobile App.

If One Signature Review Workflow is enabled, you can sign order reviews for multiple patients at a time.

NOTE
Order reviews can only be completed on orders with a status of Active or On Hold.

Step	One Signature Review Workflow to sign reviews for multiple patients	Signing order reviews for a single patient
	1. In the dock, tap the **Sign** icon. 2. Tap **Order Reviews**.	1. In the dock, tap the **Sign** icon. 2. Tap **Order Reviews**.
	1. Tap **^** to expand patient order details. **NOTE** You can update an order during the Order Review. Swipe left on the order to access options.	1. Tap patient tile.
	1. Select individual patients or tap **Mark All**. 2. Tap **Sign Order Review**. **NOTE** When you sign the Order Review, those order updates are complete and show as Pending Confirmation.	1. Select individual orders or tap **Mark All**. **NOTE** You can update an order during the Order Review. Swipe left on the order to access options. 2. Tap **Sign Order Review**. 3. Edit **Next Scheduled Order Review** date, if needed. 4. Tap **Sign**. **NOTE** When you sign the Order Review, those order updates are complete and show as Pending Confirmation.

Step	One Signature Review Workflow to sign reviews for multiple patients	Signing order reviews for a single patient
	• Type your password or device token. **NOTE** If you made updates and you are using a device token, you are prompted to enter a device token twice when signing the Order Review. You must use a different code for each signature. 1 for the order updates and a second for the Order Review. • Tap **Ok**.	• Type your password or device token. **NOTE** If you made updates and you are using a device token, you are prompted to enter a device token twice when signing the Order Review. You must use a different code for each signature. 1 for the order updates and a second for the Order Review. • Tap **Ok**.

NOTE
You can also complete reviews from the patient's chart. Tap **RX** and tap **Review**.

Secure Conversations

Standard Role Assignment and Secure Conversations Features Quick Start

This quick start guide provides the steps to complete Standard Role Assignment and Secure Conversations Features.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

Complete Standard Role Assignment

You can automatically or manually assign standard roles to users.

- **To automatically assign standard roles to users**

1. Do one of the following:
    a. Single facility: Admin > Setup > Standard Role Assignment.
    b. Multi-facility: Management Console > Standards > Financial Management > Standard Role Assignment.
2. Click **AUTOMAP**.
3. Review the roles assigned to users.

- **To manually assign standard roles to users**

1. Do one of the following:
    a. Single facility: Admin > Setup > Standard Role Assignment.
    b. Multi-facility: Management Console > Standards > Financial Management > Standard Role Assignment.
2. Select 1 or more users.
3. Click **Update Roles**.
4. Select and clear roles as needed.
5. Click **Save**.

- **To update standard roles in Security Users**

1. Do one of the following:
    a. Single facility: Admin > Setup > Security Users.
    b. Multi-facility: Management Console > Standards > Financial Management > Security Users.
2. Next to a user, click **Actions** and select **Edit**.
3. For Standard Role, select and clear roles as needed.
4. Click **Save**.

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

Complete Secure Conversations Features

IMPORTANT
To complete Secure Conversations Features, you must have the IT Systems Administrator standard role.

1. Do one of the following:
    a. Single facility: Clinical > Setup > Secure Conversations Features.
    b. Multi-facility: Management Console > Standards > Care Management > Secure Conversations Features.
2. Search for and select a standard role.
3. Turn on to activate.
4. Update the features as needed.
5. Click **Save**.

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

Assigning Standard Roles

Standard roles help you

- onboard users and new products faster.
- meet the requirements of standardization across the care continuum.

> **NOTE**
> Standard Roles do not affect the system and custom security roles.
>
> To use new and updated products, standard roles are required. 1 or more standard roles must be assigned to users.
>
> To use Standard Role Assignment, you must have Read/Add/Edit/Delete access to Security Users.

You can:

- Map roles automatically to users based on users assigned positions. You must manually update users with no assigned position. Automatically mapping roles does not update users with standard roles already assigned.

  > **NOTE**
  > Positions are assigned when creating a security user. If no position is assigned, edit the security user and select the appropriate position.

- Update roles assigned manually at any time. The update is effective the next time the user logs in.
- Assign roles to multiple users simultaneously.
- Assign as many roles to a user as needed.
- Edit a user to add a Standard Role.

To assist you with reporting, the first 40 standard roles are based on the job codes defined by the Centers for Medicare and Medicaid Services for Payroll Based Journal (PBJ). For more information, see Standard Role Definitions.

Steps

To automatically assign roles to users

1. Do one of the following:
   - Single facility: Admin > Setup > Standard Role Assignment.
   - Multi-facility: Management Console > Standards > Financial Management > Standard Role Assignment.
2. Click **Automap**.
3. Click **Automap**.
4. Review the roles assigned to users.

   > **TIP**
   > Sort the list the way that works best for you. For example, by positions, locations, or standard roles.

5. Follow the steps to manually add or update roles for 1 or more users, if needed.

To manually add or update roles for 1 or more users

1. Do one of the following:
   - Single facility: Admin > Setup > Standard Role Assignment.

- Multi-facility: Management Console > Standards > Financial Management > Standard Role Assignment.

2. Select **User**.
3. Click **Update Roles**.
4. Select and clear roles as needed.
5. Click **Save**.

TIP
Select multiple users to add or update the roles simultaneously. To find users faster:

- Filter the list by positions, locations or standard roles.
- Sort the list. For example, by position or location.

To add or update standard roles for 1 user in Security Users

1. Do one of the following:
    - Single facility: Admin > Setup > Security Users.
    - Multi-facility: Management Console > Standards > Financial Management > Security Users.
2. Next to a User, click **Actions**, and select **Edit**.
3. In Standard Role, select and clear roles as needed.
4. Click **Save**.

Secure Conversations Features Configuration

Secure Conversations Features contain the settings required to set up Secure Conversations access in your organization. You must confirm the accuracy of these settings. Before assigning Secure Conversations access, you must complete Standard Role Assignment. For more information see, Assigning Standard Roles [35].

NOTE
To complete Secure Conversations Features, you must have the IT Systems Administrator standard role. Secure Conversations must be activated for at least 1 location in your organization.

Steps

To assign Secure Conversations access.

1. Do one of the following:
    - Single facility: Clinical > Setup > Secure Conversations Features.
    - Multi-facility: Management Console > Standards > Care Management > Secure Conversations Features.
2. Search and select the standard role.
3. Turn on to activate.
4. Complete the fields as required.
5. Click **Save**.

Configuration Options

Below is a list of the configuration options available to you.

- **Platform** Select option.
  - **Web (default)** - Provides access to Secure Conversations through the web application.
  - **Mobile** - Provides access to Secure Conversations mobile app on iOS and Android mobile devices.
- **Features** Select options.
  - **General conversations** - Participants can communicate with defined contact groups or individuals.
    - **Create conversations** - Create a conversation and add participants.
    - **Edit participants and leave conversations** - Add or remove participants from the conversation and leave a conversation without ending it for the other participants.
    - **End and delete conversations** - Removes the conversation for all participants and in all areas where Secure Conversations is available.
  - **Resident-specific conversations** - Participants can communicate with defined contact groups or individuals about a specific resident.
    - **Create conversations** - Create a resident-specific conversation and add participants.
    - **Edit participants and leave conversations** - Add or remove participants from a resident-specific conversation and leave a resident-specific conversation without ending it for the other participants.
    - **End and delete conversations** - Removes the resident-specific conversation for all participants and in all areas where Secure Conversations is available.
    - **Copy conversations into progress notes for residents** - Select all messages in the conversation to include in the resident's progress note.
    - **Read conversations when not added as a participant** - Non-participants in a conversation have access based on the following selections.
      - **Only in residents' charts (web only)** - Non-participants can only view resident-specific conversations that appear in Other while they are on the residents's chart.
      - **Anywhere (mobile and web)** - Non-participants can view resident-specific conversations that appear in Other in all areas where Secure Conversations is available.
      - **Join conversations** - Non-participants can join resident-specific conversations that appear in Other.
    - **Attachments** - Send photos in conversations and upload photos to residents' charts.
    - **Attach note (SBAR, SOAP, etc.)** - Add a template to a message.
    - **Groups Setup** - Create and edit contact groups.

Customizing Message Expiry

You can customize the number of days a message appears in a conversation. Message expiry applies to all Secure Conversations applications and types of conversations. Updates to message expiry affect all locations in your organization. You must confirm the accuracy of these settings.

NOTE
You must have the IT Systems Administrator standard role to access message expiry setup.

Steps

1. Secure Conversations icon > more icon > Settings.

2. Select the message expiry for General and Resident-specific.
3. Click **Save**.

Groups Setup Configuration

Groups Setup Configuration contains the settings required to set up contact groups in your organization. You must confirm the accuracy of these settings. The list of users is determined by the conversation type and location selected. Contacts must have a standard role and Secure Conversations access before you can add them to a group. For more information, see Standard Role Assignment and Secure Conversations Features Quick Start [34]

NOTE

If your organization used the previous version of Secure Conversations, your existing groups appear in the new Groups Setup.

When adding contacts, you can click Standard Role to sort contacts by their standard role assignment.

The group name must be

- unique within your organization.
- a minimum of 3 and a maximum of 50 characters.

Creating General Conversation Groups

1. Secure Conversations icon > more icon > Groups Setup.
2. Click **ADD GROUP** and select **General**.
3. Complete the fields as required.
4. Search contacts or select from the list.
5. Click **ADD**.

Creating Resident-Specific Groups

1. Secure Conversations icon > more icon > Groups Setup.
2. Click **ADD GROUP** and select **Resident-specific**.
3. Complete the fields as required.
4. Search contacts or select from the list.
5. Click **ADD**.

Editing Groups

NOTE

Contacts that no longer have access appear with a warning icon. You can remove the contact from the group or leave the contact if access will be restored. The user won't be added as a participant to a conversation until access is restored. After access is restored, the warning icon is removed.

1. Secure Conversations > More icon > Groups Setup.

2. Hover over the group row, then click the edit icon.
3. Edit the group name, if needed.
4. Add or remove contacts, if needed.
5. Click **SAVE**.

Signing In and Off the Secure Conversations Mobile App

You can sign in to the Secure Conversations mobile app on your mobile device to communicate securely and efficiently in real-time with physicians, practitioners, and care team staff.

Signing off of the Secure Conversations mobile app ensures your session is securely closed.

> **NOTE**
> Standard Role Assignment and Secure Conversations Features must be set up to provide users access to Secure Conversations.

Steps

To sign in

1. On your mobile device, open the Secure Conversations mobile app.
2. Type your organization code, a period, and your username.
3. Tap **NEXT**.
4. Type your password.
5. Tap **Sign In**.

To sign off

1. From the Conversations page, tap your initial in the upper left hand corner.
2. Tap **Sign off**.

> **NOTE**
> After signing off, you no longer see mobile notifications when you receive a new message in Secure Conversations. To continue seeing notifications, you must stay signed in. For more information, see Viewing My Messages and Other [40].

Viewing My Messages and Other

You can access conversations by clicking the Secure Conversations icon in the top right of the screen. The options available in Conversations are dependent on your standard role assignment and the access selected in Secure Conversations Features.

General Conversations

Access to general conversations allows you to communicate with other participants or with a defined contact group within the facility. When you are a participant in a general conversation, you can view the conversations in MY MESSAGES.

Resident-Specific Conversation

Resident-specific conversations are between 2 or more users about a specific resident. You must have access to the resident's chart as well as have the appropriate access in Secure Conversations Features for resident-specific conversations.

In MY MESSAGES, you can view resident-specific and general conversations you are a participant in.

When you have access to read resident-specific conversations from anywhere in the application, but are not added as a participant, the conversations appear under OTHER.

If the resident is in your current facility, you can open the resident's chart by clicking their name.

Message Read Indicators

For your sent messages, indicators appear if the message is read.

- 1 checkmark - At least 1 participant read the message.
- 2 checkmarks - All participants read the message.

Resident Search

In MY MESSAGES or OTHER, search allows you can find all the conversations about a resident in your current facility. Open search and type 3 or more characters of the resident's name. To search for a resident in a different facility, change your facility using the facility selector. This is useful when working in a resident's chart and you need to reply in a conversation about a different resident, without leaving the other resident's chart.

Resident Search in the Secure Conversations Mobile App

In MY MESSAGES, you can find all the conversations about a resident. To search, type 2 or more characters of the resident's name.

If you filter by multiple facilities (multi-facility organization only) it searches residents in the selected facilities.

Conversation Filters

In the web, when accessing Secure Conversations from any tab on the resident's chart, you can filter by All and resident name. You can select **All** to see all conversations or select the resident name to view conversations specific to the resident.

In MY MESSAGES, you can filter by unread messages. Conversations containing at least 1 unread message appear.

Using the filter icon, you can filter conversations by 1 or more units. If you are a multi-facility organization, you can also filter by 1 or more facilities. A teal dot next to the filter icon indicates you are using a filter. If you apply a unit filter for the facility you are in and open a resident's chart, only messages pertaining to the resident appear.

After applying the unit or facility filter,

- you can view filtered messages by clicking **All** or **Unread**.
- resident search searches residents in the facility you are in.
- conversations in OTHER only show for the current facility you are in. If you are a multi-facility organization and you apply a filter for a facility that you are not currently in, you do not see conversations in OTHER.

In the Management Console, conversations from all facilities show in OTHER. If a unit or facility filter is applied, conversations do not show.

Conversation Filters in the Secure Conversations Mobile App

In MY MESSAGES, you can filter by unread messages. Conversations containing at least 1 unread message appear.

Using the filter icon, you can filter conversations in MY MESSAGES and OTHER

- by 1 or more facilities (multi-facility organizations only).
- by 1 unit at a time (single facility organizations only). After applying the units filter, resident search searches all residents in your organization.

After selecting filter options, you must apply the filter. A teal dot next to the filter icon indicates you are using a filter.

Message Notifications

When you have an unread message, a teal dot appears next to MY MESSAGES and the conversation. The dot remains until you read the message.

When Secure Conversations is closed, a red dot appears on the Secure Conversations icon when there is a new message. A red flag on the icon indicates there is a new message marked as important.

Message Notifications in the Secure Conversations Mobile App

When you have an unread message, a teal dot appears next to MY MESSAGES and the conversation. The dot remains until you read the message.

You continue to receive notifications, with sound, until you sign off of the mobile app. Notifications are based on the following scenarios:

- The notifications are from the most recent facility you logged into.
- You close the app or keep it working in the background up to 7 days. When you tap the notification, you can view the message without logging in again.
- You close the app or keep it working in the background longer than 7 days. When you tap the notification, you must log into the same facility to view the message. If you tap the message and log into a different facility, you do not see the message. For example,
  1. You were logged into Greenleaf facility and logged out of the app more than 7 days ago.
  2. You receive a message notification from Greenleaf.
     a. You tap the message and log into Greenleaf. You see the message.
     b. You tap the message and log into Midland. You do not see the message.

Priority Conversations

With priority conversations, you can mark a conversation as important when it is first created. This is available in web and mobile for general and resident-specific conversations. When a conversation is marked as important, the following occurs:

- The important icon (red flag) appears on the Secure Conversations icon. (Web only)
- Important unread messages appear at the top of the inbox with an important icon.
- Read messages always have the important icon so they are easily seen when viewing the inbox.
- In the Other tab, the same Important icon appears on conversations so they are easily seen when viewing that tab.
- When a conversation is marked as important, it remains an important conversation until the conversation expires or is ended.
- When viewing the messages of an important conversation, the important icons appears in the header of the conversation and the subject appears red. If no subject is provided, the word important appears.
- In Conversation Details, a red banner appears on top.

Creating a General Conversation

General conversations allow staff to communicate with 1 another or with a defined group within the facility. You can communicate securely in real-time through the web application and the Secure Conversations iOS or Android mobile apps.

> **NOTE**
> Standard Role Assignment and Secure Conversations Features must be set up to provide users access to Secure Conversations.

Create a General Conversation

1. In the top right of the screen, click the **Secure Conversations** icon.
2. Click the conversation icon to create a general conversation.
3. Click **GENERAL**, if available.
4. Select 1 or more locations, then click **NEXT**.
5. Do one of the following:
    - Type and select the group name, the participant's name, or login name.
    - Click the contacts icon and select groups and participants' names. Click **SAVE**.
6. Type a subject, if needed.
7. Select **Important**, if needed. For more information, see Priority Conversations [42].
8. Type a message, then click the send icon.

Create a General Conversation in the Secure Conversations Mobile App

1. Tap the conversation icon to create a general conversation.
2. Tap **General**, if available.
3. Select 1 or more locations, then tap **Next**.
4. Do one of the following:
    - Tap **Search contacts**. Type and select the group name, or the participant's name or login name.
    - Tap **Search contacts** and tap the contacts icon to select groups and participants' names. Tap **Save**.

    > **NOTE**
    > To remove a contact, tap the contact's name then the trash icon.

5. Type a subject, if needed.
6. Select **Important**, if needed. For more information, see Priority Conversations [42].
7. Type a message, then tap the send icon.

Creating a Resident-Specific Conversation

Resident-specific conversations allow staff to communicate with 1 another or with a defined group within the facility about a specific resident. You can communicate securely in real-time through the web application and the Secure Conversations iOS or Android mobile apps.

You can start a resident-specific conversation anywhere there is a Secure Conversations message icon. You can create a progress note from the message and save to the resident's chart. Participants in the conversation must have access to the resident and have the resident-specific feature selected for their standard role.

> **NOTE**
> Standard Role Assignment and Secure Conversations Features must be set up to provide users access to Secure Conversations.

Create a Resident-Specific Conversation

1. In the top right of the screen, click the **Secure Conversations** icon.
2. Click the conversation icon to create a resident-specific conversation.
3. Click **RESIDENT-SPECIFIC**, if available.
4. Select **location**, if available.
5. Select a resident.
6. Do one of the following:
    - Type and select the group name, the participant's name, or login name.
    - Click the contacts icon and select groups and participants' names. Click **SAVE**.
7. Type a subject, if needed.
8. Select **Important**, if needed. For more information see, Priority Conversations [42].
9. Type a message, then click the send icon.

Create a Resident-Specific Conversation in the Secure Conversations Mobile App

1. Tap the conversation icon to create a resident-specific conversation.
2. Tap **Resident-specific**, if available.
3. Select a location, if available.
4. Select a resident.
5. Do one of the following:
    - Tap **Search Contacts**. Type and select the group name, or the participant's name or login name.
    - Tap **Search contacts** and tap the contacts icon to select groups and participants' names. Tap **Save**.

    > **NOTE**
    > To remove a contact, tap the contact's name then the trash icon.
6. Type a subject, if needed.
7. Select **Important**, if needed. For more information, see Priority Conversations [42].
8. Type a message, then tap the send icon.

SBAR Template Workflow

The SBAR template is a valuable tool for communicating with healthcare professionals, playing a significant role in improving resident outcomes. The SBAR provides a summary of pertinent resident information to the practitioner.

Additional benefits:

- Clear communication reducing misunderstanding.
- Essential information is organized and communicated efficiently.
- Promotes resident safety with crucial information and timely interventions.

- Creates a standardized method of communication to streamline messaging.
- Provides a comprehensive snapshot of a resident's condition supporting continuity of care.

When creating a resident-specific conversation, you can click the attach note icon, then select **SBAR (blank)** or **SBAR**. The SBAR (blank) allows you to manually enter the resident's information and the SBAR autopopulates the resident's information from their chart.

The following information is available:

- Facility
- Physician
- Code Status
- Allergies
- Vitals
- Diagnoses
- Assessments
- Recommendations

NOTE

- Vitals - Must be entered in the resident's chart within the last 2 hours to appear in the SBAR.
- Assessments - Appears blank. You can add your assessment of the resident's condition.
- Recommendations - Appears blank. You can add your recommendations for the resident.

For more information about	Click to open this topic
Creating a resident-specific conversation	Creating a Resident-Specific Conversation [43]
Adding an SBAR template to a resident-specific conversation	Adding Templates to a Resident-Specific Conversation [45]

Adding Templates to a Resident-Specific Conversation

Adding a template to a resident-specific conversation is a valuable tool for communication to improve resident outcomes. Using the templates provides a summary of resident information to the practitioner that helps standardize communication, enhance efficiency, and support continuity of care.

The following templates can be added:

- **SOAP** (web only) - Populates the facility name, code status, allergies, and diagnoses if available. You can add documentation to complete the template subjective, objective, assessment, and plan sections.
- **SBAR (blank)** (web only) - Allows you to manually complete the template and enter the resident's information.
- **SBAR** - Autopopulates the resident's information from their chart.

NOTE
You must have Attach note (SBAR, SOAP, etc.) selected for your standard role in Secure Conversation Features. For clinical standard roles, the option is automatically selected.

Add a Template to a Resident-Specific Conversation

1. In a resident-specific conversation, click the attach note icon.
2. Select a template.
3. Review and complete the information as needed.

> **NOTE**
> The resident's vitals must be entered in their chart within the last 2 hours to appear in the SBAR.

4. Click the send icon.

Add a Template to a Resident-Specific Conversation in the Secure Conversations Mobile App

1. In a resident-specific conversation, tap the plus icon.
2. Select **SBAR**.
3. Review and complete the information as needed.

> **NOTE**
> The resident's vitals must be entered in their chart within the last 2 hours to appear in the SBAR.

4. Tap the send icon.

Copying and Pasting a Message

From an active conversation, you can copy and paste specific messages in a conversation. The copy and paste feature can be used for messages you sent and messages others have sent. Reusing messages from a conversation saves you time from having to type repetitive information.

> **NOTE**
> You can only copy and paste messages within the Secure Conversations mobile app. However, you can copy text from outside the Secure Conversations mobile app, paste it into the message field, then send as part of a conversation.

Copy and Paste an Entire Message

1. In an active conversation, right click in the message, then select **Copy**.
2. Navigate to the location where you want to paste the message, right click, then select **Paste**.

Copy and Paste a Part of a Message

1. In an active conversation, use your cursor to highlight a specific part of a message.
2. Right click on the highlighted part, then select **Copy**.
3. Navigate to the location where you want to paste the message, right click, then select **Paste**.

Copy and Paste a Message in the Secure Conversations Mobile App

1. In an active conversation, long press the message, then select **Copy**.

2. In the Type a message field of a conversation, long press, then select **Paste**.
3. Add additional information to the message if needed, then click the send icon.

Creating a Progress Note

In a resident-specific conversation, you can create a progress note and save it to the resident's chart as a permanent record. You can select the messages to include in the progress note, add additional notes, and preview the progress note before saving. You can include the progress note on the Shift Report, 24 Hour Report, and the MD/Nursing Communication Report. The option to create a progress note is dependent on your access selected in Secure Conversations Features.

Create a Progress Note in Secure Conversations

1. In an active resident-specific conversation, do one of the following:
   - Click the progress note icon.
   - Click the more icon, then click **Create progress note**.
2. Select messages to include in the progress note, then click **NEXT**.
3. Complete the fields as required.

> **NOTE**
> To edit selected messages, click **EDIT SELECTION**.

4. Do one of the following:
   - Click **SIGN**, type your password, then click **SIGN**.
   - Click **SAVE**.

Create a Progress Note in the Secure Conversations Mobile App

1. In an active resident-specific conversation, do one of the following:
   - Tap the progress note icon.
   - Tap the more icon, then tap **Create progress note**.
2. Select messages to include in the progress note, then tap **NEXT**.
3. Complete the fields as required.

> **NOTE**
> To edit selected messages, tap **EDIT SELECTION**.

4. Do one of the following:
   - Tap **Sign**, type your password, then tap **Sign**.
   - Tap **Save**.

Uploading a Photo to a Resident's Chart

In a resident-specific conversation, you can upload photos of admission documents, skin and wound episodes, and resident records to a resident's chart from Conversation Details. The photo is uploaded to the resident's Misc/Documents tab under the category of Other. The options available in Conversation Details are dependent on your access selected in Secure Conversations Features.

Upload a Photo to a Resident's Chart

NOTE
You must save the photo to your computer to upload to the resident's chart.

1. In an active resident-specific conversation, click the more icon.
2. Click **Upload photo to resident's chart**.
3. Click **Choose File**.
4. Select the photo on your computer.
5. Click **UPLOAD**.

Take a Photo and Upload to a Resident's Chart in the Secure Conversations Mobile App

1. In an active resident-specific conversation, tap the more icon.
2. Tap **Upload photo to resident chart**.
3. Tap **Take a photo**.
4. Tap **OK** to allow Secure Conversations to access the camera, if needed.
5. Take a photo and tap **Use Photo**.
6. Type a descriptive name for the photo and tap **Upload**.

Select a Photo and Upload to a Resident's Chart in the Secure Conversations Mobile App

1. In an active resident-specific conversation, tap the more icon.
2. Tap **Upload photo to resident chart**.
3. Tap **Select a photo**.
4. Tap **Select Photos** to access the photos on your camera, if needed.
5. Select a photo and tap **Upload**.
6. Type a descriptive name for the photo and tap **Upload**.

Leaving a Conversation

In Conversation Details, you can select **Leave conversation** to leave the conversation without ending it for other participants. The options available in Conversation Details are dependent on your access selected in Secure Conversations Features.

Steps

1. In an active conversation, click or tap the more icon.
2. Click or tap **Leave conversation**.
3. Acknowledge the prompt.

Ending a Conversation

In Conversation Details, you can select **End conversation** to end and delete the conversation for all participants. The options available in Conversation Details are dependent on your access selected in Secure Conversations Features.

Steps

1. In an active conversation, click or tap the more icon.
2. Click or tap **End conversation**.
3. Acknowledge the prompt.

Editing Participants

In Conversation Details, you can select **EDIT** to update the groups or individual participants in an active conversation. The options available in Conversation Details are dependent on your access selected in Secure Conversations Features.

Add Participants to a Conversation

1. In an active conversation, click the more icon.
2. Click **EDIT**.
3. To add a group, do one of the following:
   - In the participants field, type the group's name, select the group, then click **SELECT**.
   - In the groups list, select the group, then click **SELECT**.

   > **NOTE**
   > The individual participant's name is added to the participants field and selected in the individuals list.

4. To add individual participants, do one of the following:
   - In the participants field, type the participant's name, then select from the individuals list.
   - In the individuals list, select the participant's name.
5. Click **SAVE**.

Add Participants to a Conversation in the Secure Conversations Mobile App

1. In an active conversation, tap the more icon.
2. Tap **EDIT**.
3. To add a group, do one of the following:
   - In the contacts field, type the group's name, select the group, then tap **Select**.
   - In the individuals list, select the group, then tap **Select**.

   > **NOTE**
   > The individual participant's name is added to the contacts field and selected in the individuals list.

4. To add individual participants, do one of the following:
   - In the contacts field, type the participant's name, then select from the individuals list.
   - In the individuals list, select the participant's name.
5. Tap **Save**.

Remove Participants from a Conversation

1. In an active conversation, click the more icon.
2. Click **EDIT**.
3. Do one of the following:
   - In the participants field, click the x next to the participant's name.
   - In the individuals list, click on the participant's name.
4. Click **SAVE**.

Remove Participants from a Conversation in the Secure Conversations Mobile App

1. In an active conversation, tap the more icon.
2. Tap **EDIT**.
3. Do one of the following:
   - In the contacts field, tap the participant's name, then tap the trash icon.
   - In the individuals list, tap the participant's name.
4. Tap **Save**.

Marking a Conversation as Unread

You can mark conversations as unread to identify conversations you want to return to later. A conversation marked as unread looks like a conversation with a new message. Only the last message in the conversation is marked as unread.

Mark a Conversation as Unread in MY MESSAGES

1. Right-click on a read conversation.
2. Click **Mark Unread**.

Mark a Conversation as Unread in an Active Conversation

1. Click the more icon.
2. Select **Mark Unread**.

> **NOTE**
> When you select **Mark Unread**, you are automatically taken back to MY MESSAGES.

Joining a Resident-Specific Conversation

In Conversations, you can select **OTHER** to view and join resident-specific conversations you are not a participant in. The options available are dependent on your access selected in Secure Conversations.

Steps

1. In the top right of the screen, click the Secure Conversations icon.
2. Click **OTHER**.
3. Select a conversation.
4. Click or tap **JOIN CONVERSATION**.
5. Type a message, then click the send icon