iPCR Web Training Manual

Technical support: (800) 464-1740

Technical support email address: support@ipcrems.com

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Accessing iPCR Web

iPCR Web works in conjunction with iPCR application on the iPad. iPCR Web serves two functions. The first acts as the command center to setup and configure most options for the iPad program. The second function is the repository of all closed reports. In the following sections you will be given detailed walk-through of all contents.

iPCR Web is designed to be accessed through the internet web browser on a computer. The current supported internet browsers are: Internet Explorer, Firefox and Safari. It is important to ensure you are on the most recent update of the aforementioned browsers to ensure all options display and function as designed. Another important element of accessing iPCR web is ensuring you accessing the site through a supported internet browser on a computer. While it is possible to potentially access iPCR Web using a supported internet browser on a cellular phone or personal tablet, internet browsers installed on these devices are typically the mobile version of the computer version and could present difficulty in display, navigation and selection of some of the options and features of iPCR Web as they have been designed with those platforms in mind.

To access iPCR web, click into the address bar of a supported internet browser on a computer and type: https://insight.ipcrems.com

After navigating to the iPCR Web address, the user will be presented with the iPCR Web login screen.
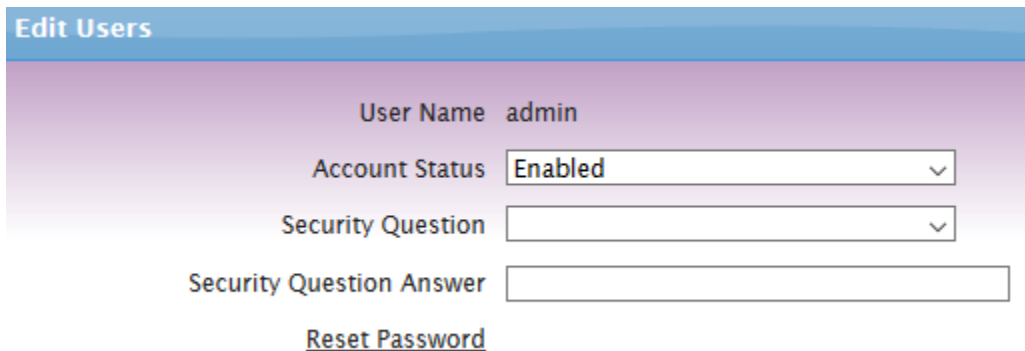
iPCR Web Sign In

If you are a new client who has never accessed iPCR web in the past, you will follow the login directions provided to you in the welcome letter. If you have not received your welcome letter or if you have questions regarding the instructions contained, please contact iPCR technical support at 800-464-1740 or via email at support@ipcrems.com. The iPCR welcome letter contains specific instructions for accessing iPCR Web for the first time and walks the agency iPCR administrator through the process of configuring a secure password.

After the first login, the username and password have been set. The iPCR administrator can now login using the provided username and password they have configured per welcome letter instructions followed by the agencies iPCR account number.

It is strongly encouraged to setup a security question and answer used in the password retrieval feature which will be discussed in later sections. See the 'Manage Users' tutorial for further information on creating additional users along with how to complete the password retrieval security question and answer portion.

iPCR Web Sign In cont.…

The iPCR Web login screen has included security features to prevent unauthorized access to your account. The user who is logging in has three login attempts to successfully enter a valid username, password and account number for the respective account. If one or more of these fields is incorrect, the user will receive that either the username, password or account number are incorrect along with number of login attempts remaining. After three unsuccessful attempts at logging in, iPCR Web will automatically lock that user for the period of five minutes. After the five minute period, the user can again attempt login.

 If a user is having issue recalling username, password or account number, they are asked to contact their local agency iPCR administrator for further assistance. Your local agency iPCR administrator has the ability to manage user accounts for assistance in recalling a forgotten username or account number. The agency iPCR administrator can also reset a password if needed. It is strongly encouraged to setup a security question and answer used in the password retrieval feature which will be discussed in later sections. See the 'Manage Users' tutorial for further information on creating additional users along with how to complete the password retrieval security question and answer portion.
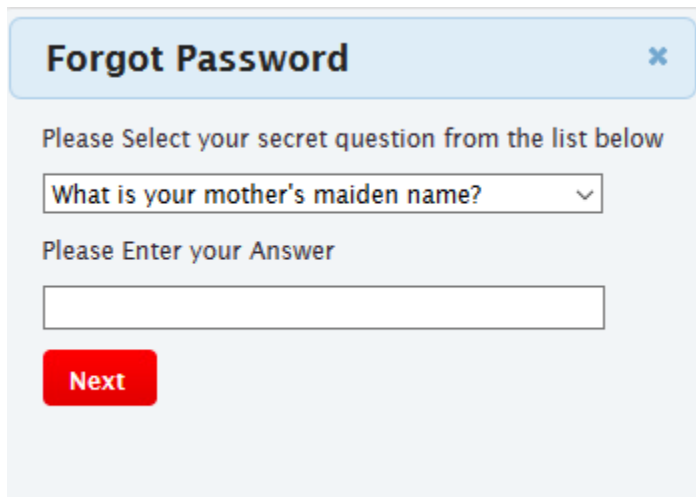
Persistent iPCR web features

Once the user successfully logs into iPCR Web the program will load. The content available in iPCR Web is determined by two factors. The first factor for iPCR Web content is determined by the features purchased. For the purpose of training documentation, we will be covering all potentially available sections. If you see a section of iPCR Web that is not available to you in the training document and would like to inquire about it, please contact your iPCR account manager at 800-456-2622 X2050 after first speaking with your local agency iPCR administrator. The second factor of iPCR Web content is determined by the user's security level. There are three security levels an iPCR user may have: Normal user, Manager and Administrator. User accounts and security level are set locally by your agency iPCR administrator and grant access to different parts of the program. For more information, please see the 'Manage Users' section of the training document found with the 'Administration' area.

Administrator

Manager

Normal User

Help: The help button is located in upper right corner of your web browser after logging into iPCR Web. You will find many options available within the sub menu.

Remote Support: This option will allow our technical support team to access your system. By clicking 'Proceed' below, our support team will be able to access your system and see everything just as you would see it. They will not be able to view your computer or screen. The Remote Support session will be available to technical support for the next 10 minutes before expiring. In addition to the built-in 'Remote Support' option, the iPCR technical support has the ability to log into your computer if assistance is needed using the LogMeIn remote connection application.
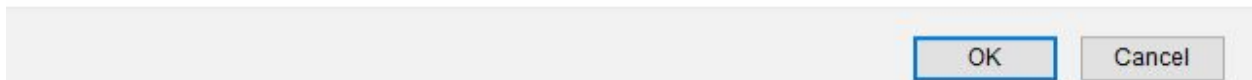
Persistent iPCR web features cont.…

About: About is found by selecting 'Help' then 'About. The about tab will show the user information regarding the update of the program they are on in iPCR Web as well as the account number and phone number for technical support, 800-464-1740. Please note the displayed version and update would be dependent on current released version available and is subject to change as the program is updated over time.

Within 'About iPCR' you will also find a 'Flush Cache' button which can clear the stored program cache if having a display issue or issue selecting a field within your internet browser. You will be asked to log out and back in for this change to take effect.

Finally you will see a multi-colored circle. When selected, the user has the ability to customize iPCR Web color scheme in the displayed 'Themes' pane.

Persistent iPCR web features cont.…

Global Search: Located at the top of the iPCR Web page, you will see the large text search box.

This box is referred to as the 'Global Search Box' and can be used to quickly locate PCRs in iPCR Web. To use, simply click into the box and type in one of the following: Incident number; PCR ID (number to the far left of a PCR in iPCR Web); patient last name; medic last name. Once you have typed one of these items in, click 'Search' and the program will search every section of iPCR Web and will display any matching results in all available sections. This is a quick way to locate a PCR and is recommended if unsure of a PCRs status and location in iPCR Web.

Home

iPCR v3.6.0 Release Notes

This is a service release that includes the following new features and fixes:

- Added the ability to customize treatments in the Administration section of the iPCR Web Portal.
  - Ability to Customize or Add New Treatments
  - Fully Customizable Treatment field names
  - Fully Sortable Field names in all Treatments
  - Complete Treatment Code Descriptor customization
- Added an 'Other' option to Patient History, Medications and Medical History, in the Patient Info screen, which allows for the entry of custom values, once selected.
- Added search capability in the "Performed By" field when adding treatments to a PCR.
- Increased performance of the app in low connectivity areas.

- Minor bug fixes
- Patient Disposition box expanded to allow for longer field labels
- Fixed an issue where inactive treatments were being displayed in iPCR.
- Fixed an issue where treatment defaults were not being set under certain circumstances.

The Home tab is the first screen you are presented with when logging into iPCR Web. The Home tab contains the current iPCR version release notes. The release notes are subject to change as each new version or update to the program is released.

Messages
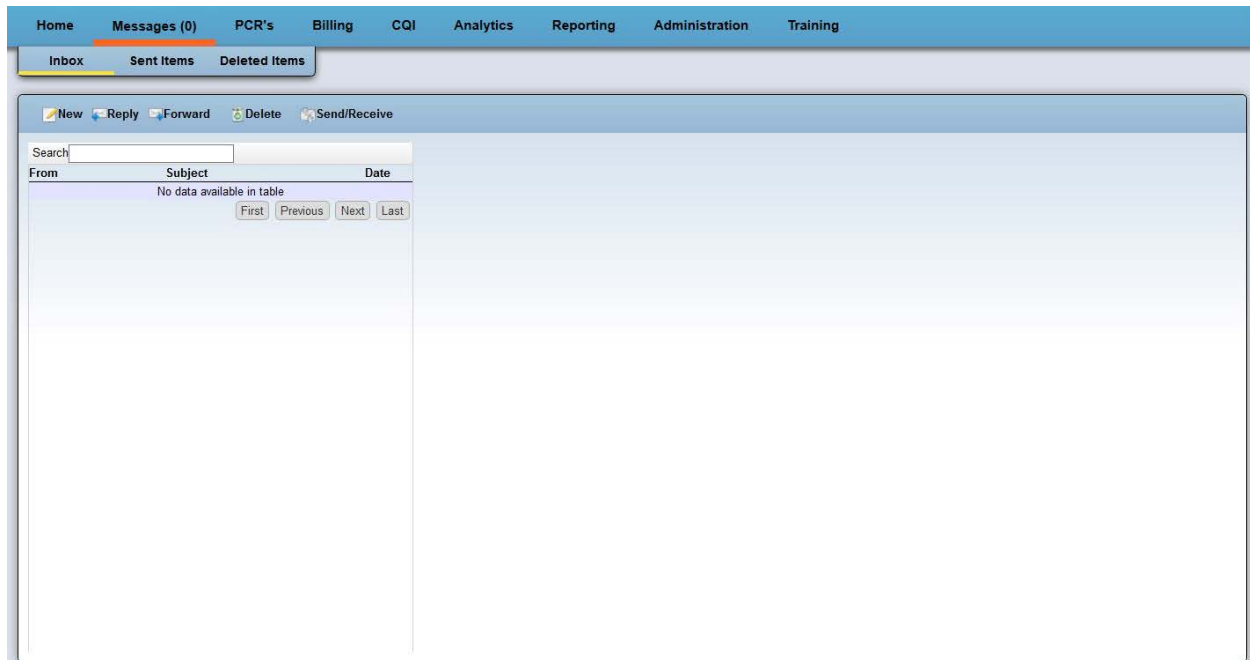
This iPCR Web messages tab allows the user to see all messaging sent between users of the iPCR system that they have been included on. Behaving in a similar fashion to email, the iPCR messaging system is used for communication within the iPCR application exclusively.

The Message center contains three sections: Inbox; Sent Items and Deleted Items-Each is used to check its' respective function. Within each of these sections, the user has the ability to click 'New' to create a new message, 'Reply' to reply to a selected message, 'Forward' to forward a selected message to another iPCR user, 'Delete' to delete a selected message which will place it into the 'Deleted Item' folder, 'Send/Receive' to force the iPCR message center to both send any pending messages and look to retrieve any sent to the user. There is also a search box to enter keywords of a particular message in attempt to locate faster if the user has a high volume of communications in this section.

Messages can be reviewed and addressed with the same functionality in both iPCR Web and iPCR on the iPad respectively.

PCRs

The PCRs tab is where a user can view PCRs saved or submitted to iPCR Web. A normal user will only see PCRs in this section for which they were a crew member. An admin user will see all PCRs saved or submitted to iPCR Web across all users in their iPCR system. This program area contains the following sections:

PCRs Folder	Function
New	Location where all new PCRs, both open and closed status will appear.
Open	Location where all open PCRs will display
Closed	Location where all closed PCRs will display
Deleted	Location where all PCRs deleted from iPCR Web will display. Note that PCRs deleted on the iPad are retained on that iPad and can be recalled by the maintenance user for the period of 30 days. iPCR Web deleted folder will hold deleted PCRs indefinitely. **You can only delete an opened PCR, closed PCRs are subject to permanent record for both billing and/or CQI and cannot be purged from the system**
All	Cumulative folder showing all PCRs from the 'New', 'Open', 'Closed' and 'Deleted' folder respectively

The user can use either the global search box referenced earlier to search for a PCR or can use the search box located at the top of each PCRs folder. When using this search box, the user must ensure they enter either Incident number; PCR ID (number to the far left of a PCR in iPCR Web); patient last name; medic last name. Once you have typed one of these items in, enter a date range for the PCR you are searching for and click 'Search'. The program will search every section of the PCRs folder you are in and will display any matching results. It is recommended to use the global search box as that searches all folders and dates. If wanting to search only within 'PCRs', it is recommended to use the 'All' search box as it will search all sections within the 'PCRs' tab.

PCRs cont....

Clicking on a PCR in the PCRs section will display a preview of the PCR. This preview is the last generated image from the iPad taken from the review screen prior to submission to iPCR web.

There are two options in the PCR preview: Print View and Create Revision

Print view: Shows the printable version of the full report and will allow the user to download a copy or print as needed using your adobe reader's options.

Create revision: Only available if the PCR has not gone through any phase of the CQI or billing process. If a PCR has gone through one of these processes, the only option for further revision is to have a CQI or billing assigned personnel send back through the respective processes in those areas. Selecting the create revision (if available as mentioned earlier), the user must agree to the following message:

PCRs cont....

After agreeing to the revision message, the user will be taken into the PCR and can make edits. Once complete, the user will click review and submit to close that PCR with the new edits.

Incident		**Call Times**	**Delays**

Incident

Date	01/21/2016
Incident #	777-1-1
Run# /Call #	777-1-1
Type Of Service Req	911 Response (Scene)
Complaint Reported	Cardiac Arrest/Death

Call Times

Time Received	10:47	Transport	10:49
Responding	10:49	At Destination	10:49
Cancelled		Transfer Of Care	10:49 ☐ EMS
On Scene	10:49	Available Time	10:49
Patient Contact	10:49	Call Complete	10:49

Response Information

Response Urgency	Lights and Sirens
Location Type	Home/Residence
Address Type	Street Address
Address	777 Nugget Street
Address Cont	Apt #/Room # 7
City PLACERVILLE	State CA
Zip 95667	County EL DORADO
GPS	

Odometer Reading (Total 88.0)

Start 7.0	Scene 8.0	Destination 96.0	End 144.0

Additional Dispatch Information

Special Notes From Dispatch
This is a test

First Unit on Scene	Yes
Other EMS Agencies at Scene	1 Agencies Entered
Suspected Disaster	Explosive Device

Closing a PCR in iPCR web is subject to the same required field check performed on the iPad when using the 'Submit and close option'. This option allows a user to close a PCR out. This option should be selected when the user has finished all work on the PCR. When 'Submit' option is selected, the PCR will be submitted once more to iPCR web in the 'Closed' folder of PCRs as well as 'CQI' and 'Billing' if applicable for your agency. When you submit, the program will perform a check of any required fields that your agency iPCR administrator has enabled. The program will notify you of any missing required fields and allow you to return to the PCR to update that information prior to allowing you to submit. If you have a question on a required field, it is important to contact your agency iPCR administrator. It is important to note that if your agency uses either the 'Billing' or 'CQI' feature of iPCR web, the respective billing or CQI personnel only see closed items in that location.

Editing PCR: Please see corresponding PCR documentation in iPad training manual.

PCRs cont.…

Validate: The validate feature can be turned on or off by your iPCR administrator once they have turned on NEMSIS 3 data. By default, the Nemsis 3.4 validation will be enabled. The validation feature allows users to check their PCR prior to submitting and closing for NEMSIS 3 validation. Similar to the required field check previously mentioned, this feature will compare the fields and content of the PCR against the NEMSIS 3 data dictionary to confirm validation. If validation issues are found, the program will display a list of each one stating the field location and reason for validation error. The user must then correct those items in order to confirm no further NEMSIS issues before submission. The validation feature can be used from the review screen as many times as needed.
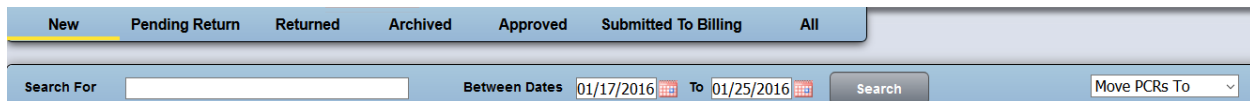
Billing

The Billing tab is where an assigned billing personnel member can view PCRs submitted (Closed) to iPCR Web for the purpose of perform a pre-billing review and to bill as defined by your agency iPCR administrator. The content available in iPCR Web is determined by two factors. The first factor for iPCR Web content is determined by the features purchased. For the purpose of training documentation, we will be covering all potentially available sections. If you see a section of iPCR Web that is not available to you in the training document and would like to inquire about it, please contact your iPCR account manager at 800-456-2622 X2050 after first speaking with your local agency iPCR administrator. The second factor of iPCR Web content is determined by the user's security level. This program area contains the following sections:

PCRs Folder	Function
New	Location where all newly closed PCRs will display
Pending Return	Location where all PCRs sent to PCR owner via billing review display
Returned	Location where all PCRs returned from a user making edits sent to them from the billing review process display
Archived	Location where all PCRs that have been selected and 'Move PCRs to Archived' have been selected. Used as way to mark PCRs as not needing anything further
Approved	Location where all PCRs that 'Approved' was clicked signifying they have been reviewed and are ready to be billed
Submitted to Billing	Shows all PCRs that have been submitted to billing. If actively billing, you may need to click the internet browser's refresh button to ensure you are looking at most recent results
All	Cumulative folder showing all PCRs from all available billing folders respectively

Billing cont.…

The user can use either the global search box referenced earlier to search for a PCR or can use the search box located at the top of each 'Billing' folder. When using this search box, the user must ensure they enter either Incident number; PCR ID (number to the far left of a PCR in iPCR Web); patient last name; medic last name. Once you have typed one of these items in, enter a date range for the PCR you are searching for and click 'Search'. The program will search every section of the billing folder you are in and will display any matching results. It is recommended to use the global search box as that searches all folders and dates. If wanting to search only within 'Billing', it is recommended to use the 'All' search box as it will search all sections within the 'Billing' tab.

Billing review-We have designed the billing with the following flow process:

1. A PCR is closed by the user either using 'submit and close' from the iPad PCR review screen or 'Submit' from the iPCR PCR review screen
2. The PCR is submitted to the billing 'New' billing folder
3. The assigned billing reviewer will click on the PCR and perform a review of the PCR
4. If the PCR review is complete and nothing further required, the reviewer will click the 'Approve' button which will automatically move the PCR to the 'Approved' folder for billing.
5. If the PCR reviewer determines the PCR is in need of further information or edits, they will 'Send to User' returning the PCR to the original submitter to address the items listed as flagged from the billing reviewer. Performing this action automatically moves the PCR to the 'Pending Return' billing folder.
6. The user will receive a message that they have been sent a PCR from billing reviewer in need of change and citing the reason. The user in-turn will make the requested changes and resubmit the PCR for final review. This process will automatically move the PCR into the 'Returned' billing folder.
7. The assigned billing staff will review the returned PCR to ensure all requested actions were satisfied and nothing further required. The reviewer will click the 'Approve' button which will automatically move the PCR to the 'Approved' folder for billing.
8. Depending on billing integration, the billing will be either submitted manually or automatically billed from the 'Approved' folder. Once complete, this process will automatically move the PCR to the 'Submitted to Billing' folder.

Billing cont....

Billing review is performed by first clicking onto the PCR the user wishes to review within either the 'New' or 'Returned' billing folders. This will open the billing review screen.

The top half of the billing review screen displays the PCR

The billing reviewer has the following options in this screen:

Attachments: Allows the billing reviewer to view all attachments associated with the PCR. The user also has the ability to attach additional attachments if needed. When adding additional attachments, the billing personnel can select a file and choose to attach the document either TO the PDF or WITH the PDF. The option reads: Enabling this option and clicking upload will set the selected file to be merged to the PDF. Leaving this option disabled and clicking upload, will associate the selected file to the PCR but will not merge it into the PDF.
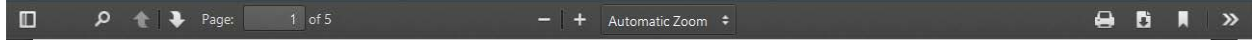
To upload an attachment, the user must:

1. Select a file by clicking the 'Browse' button
2. Decide if they wish to attach the document to the PDF or simply with the PDF
3. Click 'Upload' to upload the document to iPCR web to be associated with the PCR
4. The user can perform a final review of all combined and separate attachments and making any required changes
5. Click 'Finish' to complete the process

Billing cont....

Print view: Shows the printable version of the full report and will allow the user to download a copy or print as needed using your adobe reader's options.

Add note: This option will display an on-screen pop-up to allow user to add their notes. They must select the field by either locating it from the available list or typing into the search box for quick access in locating the field. After noting the field, the user selects what type of note this is: Error, Comment or Training. Note these options can be modified by your agency iPCR administrator if a change or new option is needed. Finally, the user will enter the note details. This can include notation of need to edit or a training item or comment. Once a note is complete, the user will click 'Add Note' to finish. The window will add the note into the case details (lower half of the screen) and clear to allow the user to add additional notes as needed. The user can choose to keep the 'Add/Edit Note' window up as they proceed with PCR review or can choose to close after each successive note and click the 'Add Note' button to add another note if needed.

Billing cont....

The bottom half of the billing review screen displays the case details pertaining to the PCR the user is currently in review of.

Case Details	Print Case Details	Approve for Billing	Send To User	Recall PCR
▶ Current Case Notes				
▶ Case Communication History				🟢
▶ Case Status History				

The case details contain the following areas:

Case Detail Area	Function
Current Case Notes	Location where all notes added in the billing reviewers current session with this PCR are held. When looking at this PCR at a future date, these comments will move from this section, into the 'Case Communication History' section
Case Communication History	Location where all past communication notes are held. This will show any communication recorded from the billing reviewer or from the PCR owner in response. Any user with billing access can also click the green addition symbol if needed to add further communication notes
Case Status History	Location that shows the complete status history for the life of the selected PCR. It will show when a PCR was submitted, sent back from review, sent back from the medic after amending, etc...

The case details section has the following options:

Print Case Details: Will print all available case details for the selected PCR from the sections: Current Case Notes, Case Communication History and Case Status History

Approve for Billing: To be clicked by the billing reviewer after the selected has been reviewed and nothing further is needed and it is ready for billing. This process will move the PCR to the 'Approved' billing folder automatically

Send to User: This option allows the billing reviewer to send the PCR back to the PCR owner, or alternate personnel if needed, to make any requested changes. To do this process the user must:

1. First review the PCR
2. Click 'Add Note' and record any questions, comments, or edits needed
3. Click 'Send To User' which will open the send to user screen

Billing cont.….

4. The send to medic screen allows the user to:
   a. Select who to send the PCR back to. By default, the program will automatically attempt to send to user unless the billing reviewer clicks into this field and selects an alternate user
   b. Send PCR to User for revision: Checking the 'Send PCR to User for revision' checkbox will allow the user to edit the PCR sent back to them. Leaving the box unchecked simply allows the user to review the PCR without edit capability. Note that you will only receive a 'Pending Return' status if you select to send PCR for revision. This option sends the PCR back to the user thus the status is essentially holding from all other possible actions (CQI, Billing, Review) until the PCR has been returned from the assigned party. Sending a PCR without the 'Send to PCR to User for revision' will not change status as you are not sending a PCR back to them, not locking the process, you are only allowing the user access to review the PCR and it can still proceed in all other areas of iPCR web.
   c. Send Additional Billing Assignment Notifications: You can include other iPCR managers or administrators to let them know that on the given date, given time, you have sent this PCR back to the user for revision. Selecting a user from within this box will only send the selected users a message that the assigned user has been assigned the PCR. The additional billing

Billing cont....

Assignment notification personnel do not receive the PCR, only message to be used as an administrative notification.

d. You may modify the message below to suit your needs. To clear the current message click 'Clear'. By default, the program will automatically insert the text, "A PCR has been assigned to you. During the Billing process, the following items were identified that require your attention" then will continue by automatically adding any of the notes you added during review. You can manually clear and type into this field if required.

e. You may also request the assigned user follow up by specific date. This date will be included automatically in the message. To select a date, you can either manually type a date: MM/DD/YYYY or click on the min-calendar icon and select a date by clicking on it.

f. Once finish you will click the 'Send' button to send the PCR and associated messages to the PCR owner as selected by the billing reviewer. This will move the PCR automatically into the 'Pending Return' billing folder. Note that if the PCR has been sent to user for edits and is in 'Pending Return' status, billing personnel have the option to click on the PCR in this folder and click 'Recall PCR' if needed to make additional notes or assign to a different user.

g. Cancel option simply cancels this process to begin again if needed.

Recall PCR: If a PCR has been sent to user for edits and is in 'Pending Return' status, billing personnel have the option to click on the PCR in this folder and click 'Recall PCR' if needed to make additional notes or assign to a different user. This option is only active if the PCR in question has a 'Pending Return' status.

History icon: Any PCR that has been revised and resubmitted to iPCR web will display a history icon that can be clicked on to see all changes made.

Selecting the history icon will display the a history of the change made in PCR summary screen
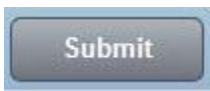
Billing cont.…

If you want to see the full PCR for each revision, simply click the magnifying glass icon next to the revision you wish to view to see the full PCR

The selected revision will display and allow print view for printing or download as needed.

Submitting billing: There are many different ways a PCR can be billed. This is determined by your billing integration setup and included training. In general, you can either manually create a billing file and upload to your billing company or per your integration, could have the program set to automatically submit your billing to the billing company per your requirements defined during the billing integration setup process. For further information on obtaining a billing integration or for training on an existing billing integration, contact iPCR technical support at: 800-464-17410.

If your account has been setup for manual billing process, you will be able to select one or more PCRs in the 'Approved' billing folder by checking the respective check box next to each (or check all box in top left) and then clicking the 'Submit' button.

Clicking 'Submit' will create a billing file per your specifications and prompt the user to save the billing file(s) to a location on the computer. The user would then upload the created billing file(s) to the billing company. We offer a wide variety of custom billing integrations and can configure them to suit the needs of the agency and billing company. We encourage you to contact technical support if interested in more information at 800-464-1740.

Continuous Quality Improvement (CQI)
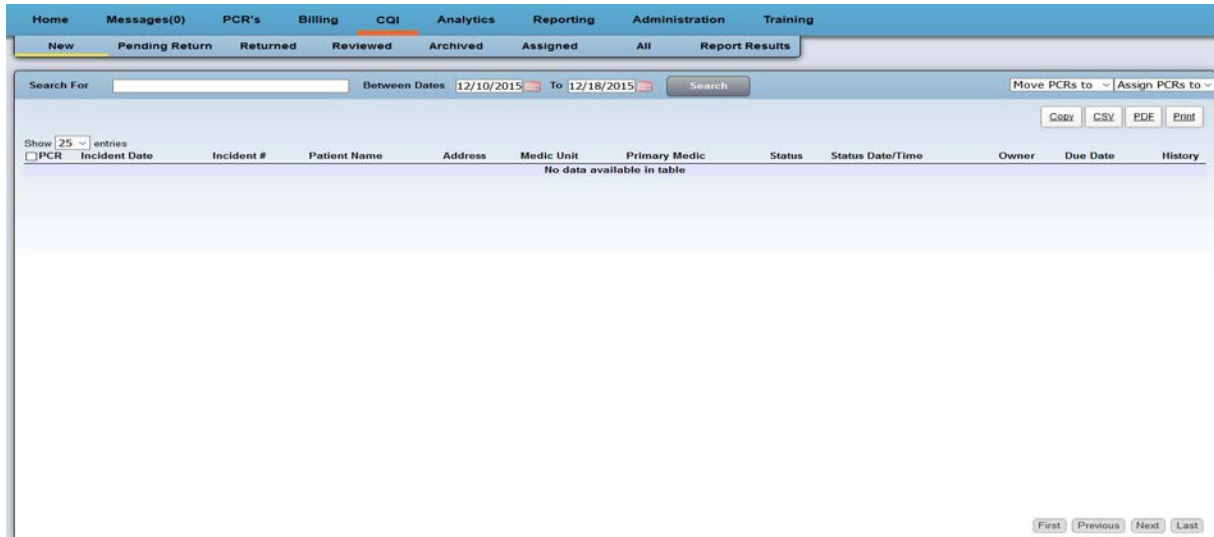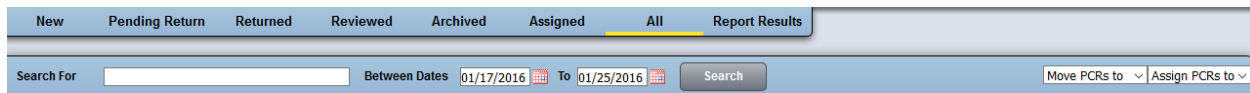
The CQI tab is where an assigned CQI personnel member can view PCRs submitted (Closed) to iPCR Web for the purpose of perform continuous quality improvement as assigned by your agencies iPCR administrator. The content available in iPCR Web is determined by two factors. The first factor for iPCR Web content is determined by the features purchased. For the purpose of training documentation, we will be covering all potentially available sections. If you see a section of iPCR Web that is not available to you in the training document and would like to inquire about it, please contact your iPCR account manager at 800-456-2622 X2050 after first speaking with your local agency iPCR administrator. The second factor of iPCR Web content is determined by the user's security level. This program area contains the following sections:

PCRs Folder	Function
New	Location where all newly closed PCRs will display
Pending Return	Location where all PCRs sent to PCR owner via CQI review display
Returned	Location where all PCRs returned from a user making edits sent to them from the CQI review process display
Archived	Location where all PCRs that have been selected and 'Move PCRs to Archived' have been selected. Used as way to mark PCRs as not needing anything further
Reviewed	Location where all PCRs that 'Complete CQI' was clicked signifying they have been reviewed and nothing further is required
Assigned	Shows all PCRs that have been assigned to be reviewed and to which user they are assigned
All	Cumulative folder showing all PCRs from all available CQI folders respectively

CQI cont.…

The user can use either the global search box referenced earlier to search for a PCR or can use the search box located at the top of each 'CQI' folder. When using this search box, the user must ensure they enter either Incident number; PCR ID (number to the far left of a PCR in iPCR Web); patient last name; medic last name. Once you have typed one of these items in, enter a date range for the PCR you are searching for and click 'Search'. The program will search every section of the CQI folder you are in and will display any matching results. It is recommended to use the global search box as that searches all folders and dates. If wanting to search only within 'CQI', it is recommended to use the 'All' search box as it will search all sections within the 'CQI' tab.

New	Pending Return	Returned	Reviewed	Archived	Assigned	All	Report Results

| Search For | | Between Dates 01/17/2016 📅 To 01/25/2016 📅 | Search | | Move PCRs to ∨ | Assign PCRs to ∨ |

CQI review-We have designed CQI with the following flow process:

1. A PCR is closed by the user either using 'submit and close' from the iPad PCR review screen or 'Submit' from the iPCR PCR review screen
2. The PCR is submitted to the CQI 'New' folder
3. The assigned CQI reviewer will click on the PCR and perform a review of the PCR
4. If the PCR review is complete and nothing further required, the reviewer will click the 'Complete CQI' button which will automatically move the PCR to the 'Reviewed' CQI folder.
5. If the PCR reviewer determines the PCR is in need of further information or edits, they will 'Send to User' returning the PCR to the original submitter to address the items listed as flagged from the CQI reviewer. Performing this action automatically moves the PCR to the 'Pending Return' CQI folder.
6. The user will receive a message that they have been sent a PCR from CQI reviewer in need of change and citing the reason. The user in-turn will make the requested changes and resubmit the PCR for final review. This process will automatically move the PCR into the 'Returned' CQI folder.
7. The assigned CQI staff will review the returned PCR to ensure all requested actions were satisfied and nothing further required. The reviewer will click the 'Complete CQI' button which will automatically move the PCR to the 'Reviewed' CQI folder.

CQI cont.…

CQI review is performed by first clicking onto the PCR the user wishes to review within either the 'New' or 'Returned' CQI folders. This will open the CQI review screen.

The top half of the CQI review screen displays the PCR

The CQI reviewer has the following options in this screen:

Attachments: Allows the CQI reviewer to view all attachments associated with the PCR. The user also has the ability to attach additional attachments if needed. When adding additional attachments, the CQI personnel can select a file and choose to attach the document either TO the PDF or WITH the PDF. The option reads: Enabling this option and clicking upload will set the selected file to be merged to the PDF. Leaving this option disabled and clicking upload, will associate the selected file to the PCR but will not merge it into the PDF.

To upload an attachment, the user must:

6. Select a file by clicking the 'Browse' button
7. Decide if they wish to attach the document to the PDF or simply with the PDF
8. Click 'Upload' to upload the document to iPCR web to be associated with the PCR
9. The user can perform a final review of all combined and separate attachments and making any required changes
10. Click 'Finish' to complete the process

CQI cont.…

Print view: Shows the printable version of the full report and will allow the user to download a copy or print as needed using your adobe reader's options.

Add note: This option will display an on-screen pop-up to allow user to add their notes. They must select the field by either locating it from the available list or typing into the search box for quick access in locating the field. After noting the field, the user selects what type of note this is: Error, Comment or Training. Note these options can be modified by your agency iPCR administrator if a change or new option is needed. Finally, the user will enter the note details. This can include notation of need to edit or a training item or comment. Once a note is complete, the user will click 'Add Note' to finish. The window will add the note into the case details (lower half of the screen) and clear to allow the user to add additional notes as needed. The user can choose to keep the 'Add/Edit Note' window up as they proceed with PCR review or can choose to close after each successive note and click the 'Add Note' button to add another note if needed.

CQI cont.…

The bottom half of the CQI review screen displays the case details pertaining to the PCR the user is currently in review of.

The case details contain the following areas:

Case Detail Area	Function
Current Case Notes	Location where all notes added in the CQI reviewers current session with this PCR are held. When looking at this PCR at a future date, these comments will move from this section, into the 'Case Communication History' section
Case Communication History	Location where all past communication notes are held. This will show any communication recorded from the CQI reviewer or from the PCR owner in response. Any user with CQI access can also click the green addition symbol if needed to add further communication notes
Case Status History	Location that shows the complete status history for the life of the selected PCR. It will show when a PCR was submitted, sent back from review, sent back from the medic after amending, etc…

The case details section has the following options:

Print Case Details: Will print all available case details for the selected PCR from the sections: Current Case Notes, Case Communication History and Case Status History

Approve for CQI: To be clicked by the CQI reviewer after the selected has been reviewed and nothing further is needed and it is ready for CQI. This process will move the PCR to the 'Approved' CQI folder automatically

Send to User: This option allows the CQI reviewer to send the PCR back to the PCR owner, or alternate personnel if needed, to make any requested changes. To do this process the user must:

5. First review the PCR
6. Click 'Add Note' and record any questions, comments, or edits needed
7. Click 'Send To User' which will open the send to user screen

[28]

CQI cont....

8. The send to medic screen allows the user to:
   h. Select who to send the PCR back to. By default, the program will automatically attempt to send to user unless the CQI reviewer clicks into this field and selects an alternate user
   i. Send PCR to User for revision: Checking the 'Send PCR to User for revision' checkbox will allow the user to edit the PCR sent back to them. Leaving the box unchecked simply allows the user to review the PCR without edit capability. Note that you will only receive a 'Pending Return' status if you select to send PCR for revision. This option sends the PCR back to the user thus the status is essentially holding from all other possible actions (CQI, CQI, Review) until the PCR has been returned from the assigned party. Sending a PCR without the 'Send to PCR to User for revision' will not change status as you are not sending a PCR back to them, not locking the process, you are only allowing the user access to review the PCR and it can still proceed in all other areas of iPCR web.
   j. Send Additional CQI Assignment Notifications: You can include other iPCR managers or administrators to let them know that on the given date, given time, you have sent this PCR back to the user for revision. Selecting a user from within this box will only send the selected users a message that the assigned user has been assigned the PCR. The additional CQI

CQI cont.…

Assignment notification personnel do not receive the PCR, only message to be used as an administrative notification.

k. You may modify the message below to suit your needs. To clear the current message click 'Clear'. By default, the program will automatically insert the text, "A PCR has been assigned to you. During the CQI process, the following items were identified that require your attention" then will continue by automatically adding any of the notes you added during review. You can manually clear and type into this field if required.

l. You may also request the assigned user follow up by specific date. This date will be included automatically in the message. To select a date, you can either manually type a date: MM/DD/YYYY or click on the min-calendar icon and select a date by clicking on it.

m. Once finish you will click the 'Send' button to send the PCR and associated messages to the PCR owner as selected by the CQI reviewer. This will move the PCR automatically into the 'Pending Return' CQI folder. Note that if the PCR has been sent to user for edits and is in 'Pending Return' status, CQI personnel have the option to click on the PCR in this folder and click 'Recall PCR' if needed to make additional notes or assign to a different user.

n. Cancel option simply cancels this process to begin again if needed.

Recall PCR: If a PCR has been sent to user for edits and is in 'Pending Return' status, CQI personnel have the option to click on the PCR in this folder and click 'Recall PCR' if needed to make additional notes or assign to a different user. This option is only active if the PCR in question has a 'Pending Return' status.

History icon: Any PCR that has been revised and resubmitted to iPCR web will display a history icon that can be clicked on to see all changes made.

Selecting the history icon will display the a history of the change made in PCR summary screen

CQI cont.…

If you want to see the full PCR for each revision, simply click the magnifying glass icon next to the revision you wish to view to see the full PCR

| Incident #: 20160127-1 | Patient Name: Last, First | Modified By: Administrator, Administrator on 2016-01-27 17:30:32 |

	Revision #1 (28)		Original Revision (27)
▽ Treatments	New Value		Original Value

If your account has been setup for CQI process, you will be able to select one or more PCRs in the 'Reviewed' CQI folder by checking the respective check box next to each (or check all box in top left) and then clicking the 'Move PCRs to' button and then selecting 'Archived' to complete the process.

We offer a variety of custom CQI training sessions and can configure them to suit the needs of the agency. We encourage you to contact technical support if interested in more information at 800-464-1740.

Analytics
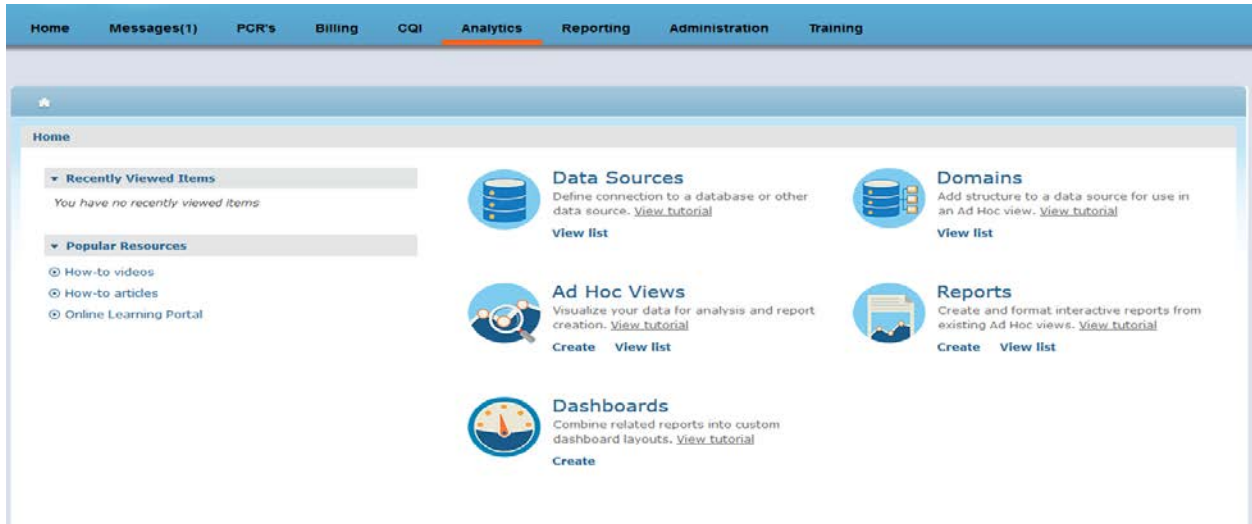
iPCR analytics has been created to allow agency iPCR administration the ability to run reports to gather stats and information from PCRs submitted to the system. The iPCR analytics system utilizes the robust reporting capabilities of the Jaspersoft analytics module. The content available in iPCR Web is determined by two factors. The first factor for iPCR Web content is determined by the features purchased. For the purpose of training documentation, we will be covering all potentially available sections. If you see a section of iPCR Web that is not available to you in the training document and would like to inquire about it, please contact your iPCR account manager at 800-456-2622 after first speaking with your local agency iPCR administrator. The second factor of iPCR Web content is determined by the user's security level. This program area contains the following sections:

Area	Function
Data sources	Define connection to a database or other data source. The majority of iPCR users will not use this feature. If needing to data source structure, we ask that you contact iPCR technical support at 800-464-1740 for further information.
Domains	Add structure to a data source for use in an ad hoc view. The majority of iPCR users will not use this feature. If needing to adjust ad-hoc data structure, we ask that you contact iPCR technical support at 800-464-1740 for further information.
Ad Hoc Views	Visualize your data for analysis and report creation. This area will allow approved users to create and manage a wide variety of reporting scenarios and can display, export data as needed.
Reports	Create and format interactive reports from existing Ad Hoc views.
Dashboards	Combine related reports into custom dashboard layouts

Analytics cont.…

Ad Hoc Views: Visualize you data for analysis and report creation. In this area, you can create a new ad-hoc view by clicking 'Create'. We have added many reports that have been requested to us over time as pre-built Ad Hoc Views, to use simply click on the 'View List' to review all pre-loaded Ad Hoc Views available. By using an Ad Hoc View from the 'View List' option, you will have the ability to run the view as is, or customize quickly and save as a new Ad Hoc View thus preserving the original if needed and allowing the creation of new view much quicker as you can select a view that is already close to the view you are wanting to create

Create new Ad Hoc view:

1. Select Data: Select the displayed data source 'iPCR Public Domain' and click 'Choose Data'
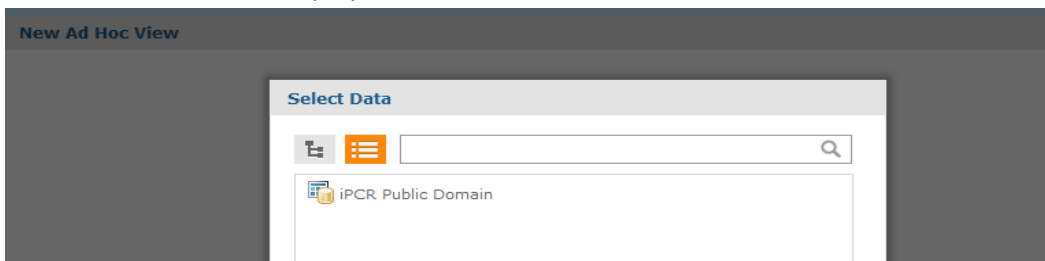
2. Choose Date: Select available fields, pre-filters and display options as needed and click 'Ok'. You can change this later in the view if unsure final fields, filters and display options needed.
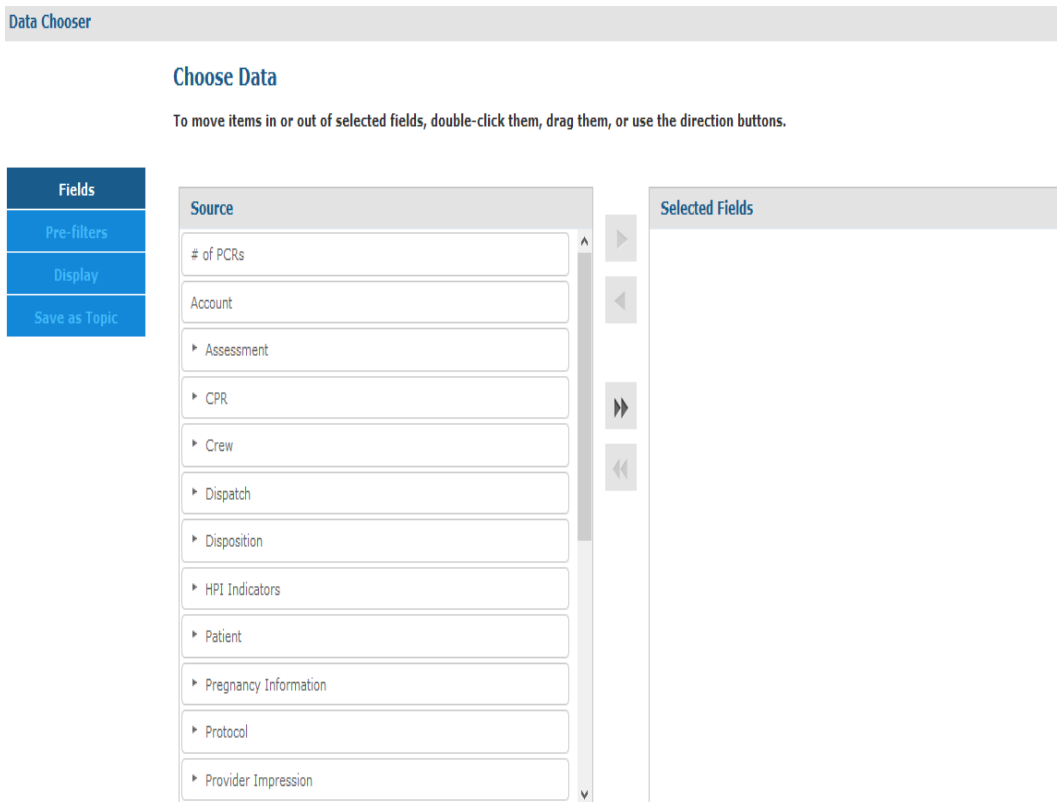
Analytics cont.….

3. Now you are in the new Ad Hoc View and need to confirm the fields and filters and location they will appear on the report.
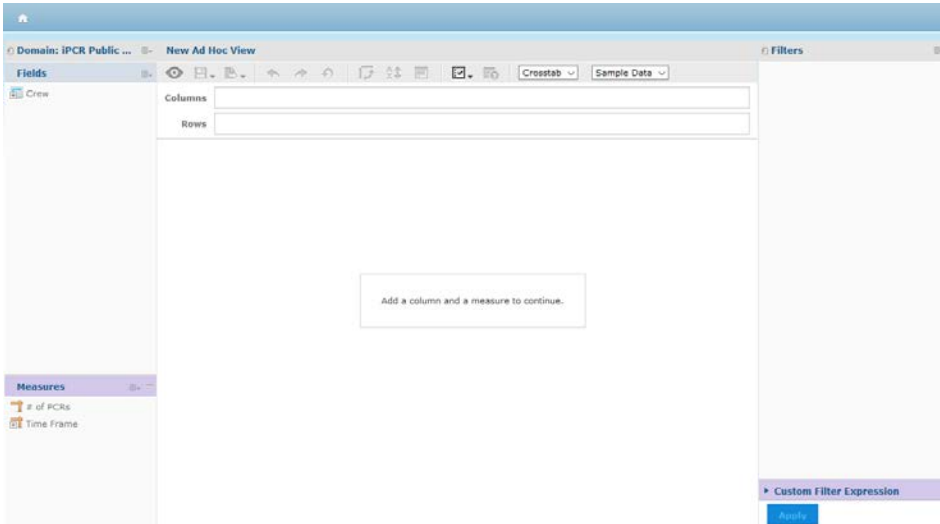
4. You can add new fields by clicking the icon and selecting 'Add fields'

5. Move 'Available Fields' to the 'Selected fields' side as needed, click 'Ok' when done
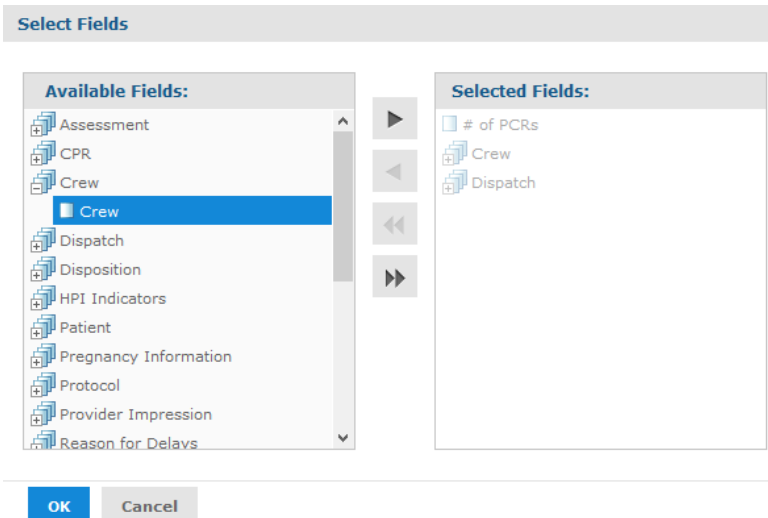
Analytics cont.…

6. Right click on fields to add them as either columns or rows in the report or to set as a filter and add calculated measures as needed.
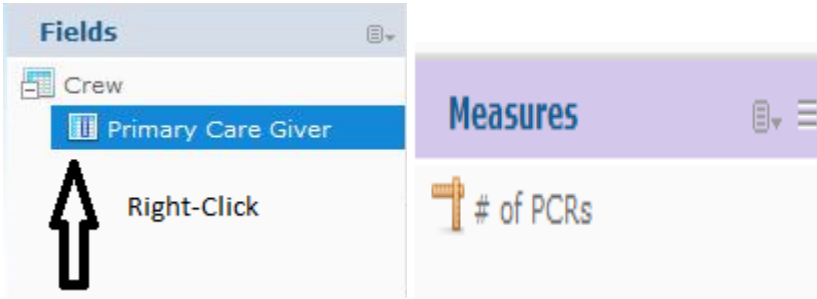
7. Set your filters to meet your criteria (sample used)
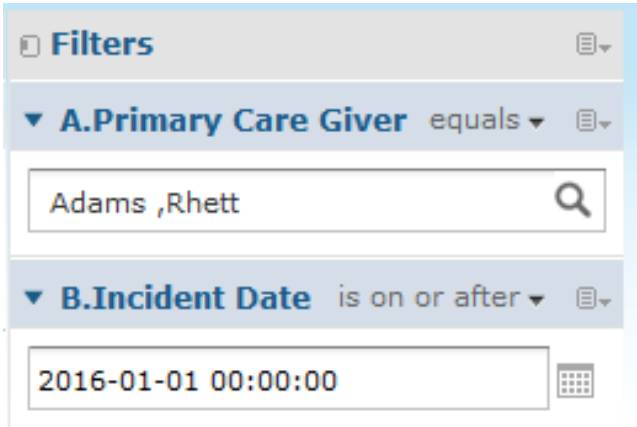
8. Adjust your columns and rows until the display displays to your preference

	Primary Care Giver	Adams ,Rhett	Totals
Measures	Incident Date		
# of PCRs	Jan 21, 2016	2	2
	Jan 22, 2016	1	1
	Totals	3	3

Analytics cont.…

9. Choose your Ad Hoc view layout:
   a. Crosstab to view the numbers. Note you can click on the numbers to obtain the PCR ID for the respective PCRs comprising this number

Columns	Primary Care Giver ×
Rows	# # of PCRs (CountDistinct) × Incident Date ×

   Click to add a title

	Primary Care Giver	Adams ,Rhett	Totals
⊞ **Measures**	**Incident Date**		
⊟ # of PCRs	Jan 21, 2016	2	2
	Jan 22, 2016	1	1
	Totals	3	3

   b. Table to see a table view of each of the PCR IDs comprising this Ad Hoc view

Columns	# of PCRs ×
Groups	Incident Date ×

   ⚙▾ Click to add a title

	# of PCRs
Jan 21, 2016	
	10
	14
Jan 22, 2016	
	15

   c. Chart to see a chart view of the numbers of PCRs comprising this Ad Hoc view
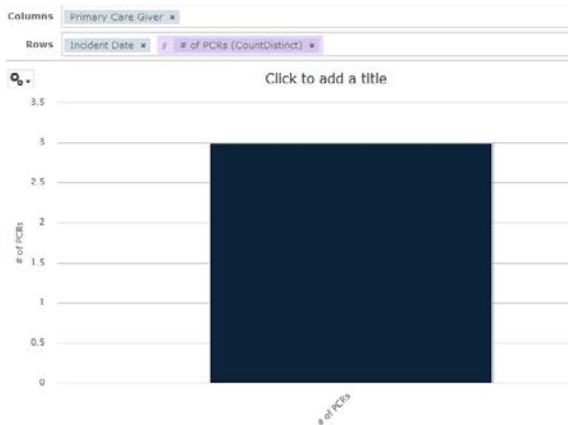
Analytics cont.…

10. Save your Ad Hoc View to the 'customer area' clicking through the sub save options and saving with a unique name
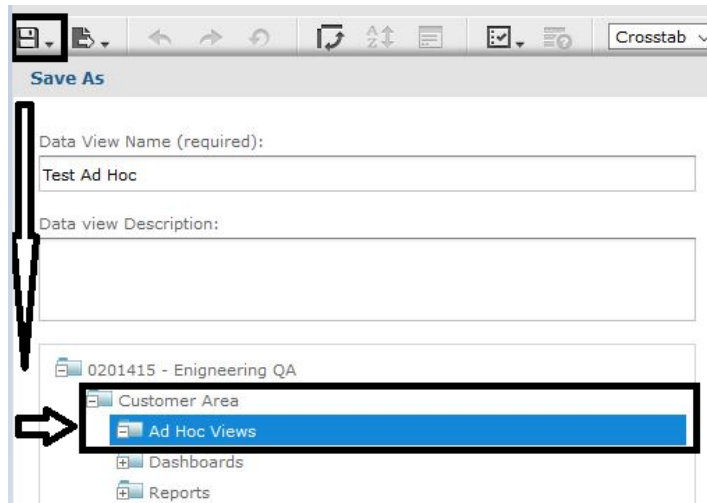
11. You will be able to recall and run or edit this Ad Hoc view in the future by locating it by selecting the 'View List' Ad Hoc View option on main analytic screen

12. You can run live data from Ad Hoc view just as you can from the reports feature. For this reason, many users will opt to work exclusively from the Ad Hoc Views as there are many more customization options that can be configured at any time. A report of this Ad Hoc view only allows the user to adjust the filters.

13. In the Ad Hoc view, after generating results, the user has a wide variety of export options. The user can click the export button and choose from the best selection needed
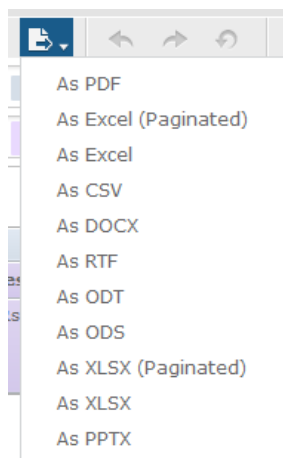
Analytics cont.…

Create Report: Create and format interactive reports from existing Ad Hoc views. In this area, you can create a new report by clicking 'Create'. We have added many reports that have been requested to us over time as pre-built reports, to use simply click on the 'View List' to review all pre-loaded reports available. By using an report from the 'View List' option, you will have the ability to run the report as is, or customize quickly and save as a report thus preserving the original if needed and allowing the creation of new report much quicker as you can select a report that is already close to the data you are wanting to create

Create new report:

1. Create report: To begin creating a report, select an Ad Hoc view from either one you have created and saved to the 'Customer Area' or from an existing Ad Hoc view in the 'Public' section. For the purpose of this training report, we will select the previously created custom Ad Hoc view. Click Ok once complete.
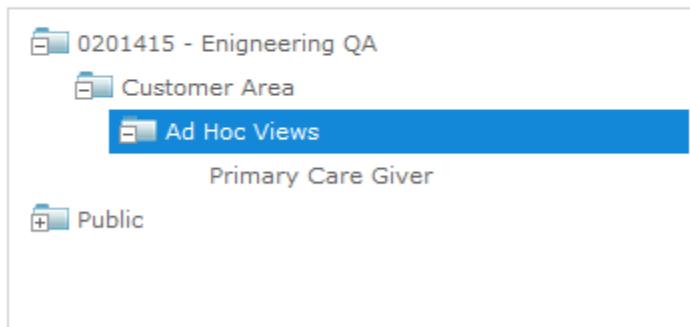
2. The report you select will display. Note that the report options are limited to the fields, filters and measures you configured in the Ad Hoc view. You can adjust the filters by clicking the icon on the tool bar. For this reason, many users will work exclusively from Ad Hoc view
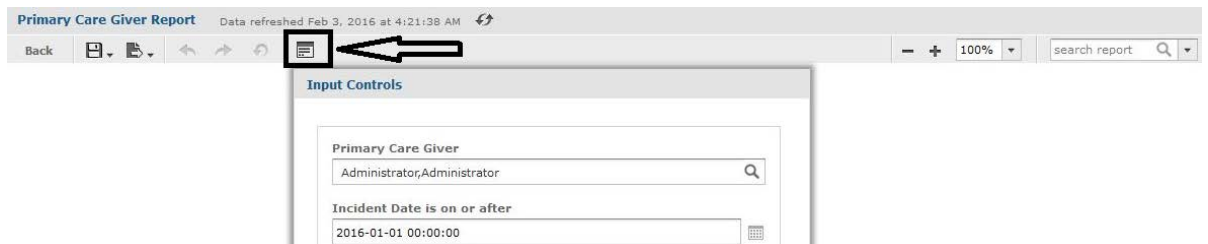
Analytics cont.…

3. In the report, after generating results, the user has a wide variety of export options. The user can click the export button and choose from the best selection needed
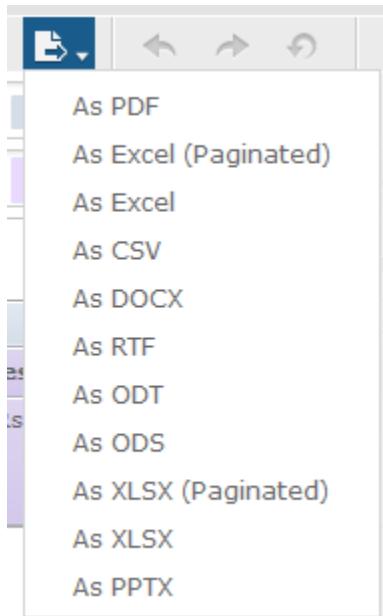
Dashboard: Combine related reports into custom dashboard layouts. To start building a dashboard

1. Drag an item from the available content panel onto the canvas to create a dashlet.
2. Use automatic placement or drag the edge of a dashlet to resize it.
3. Use the properties button in the toolbar to set dashboard-level properties
4. Double-click on a dashlet to edit its properties. Right-click a dashlet to see all available options.
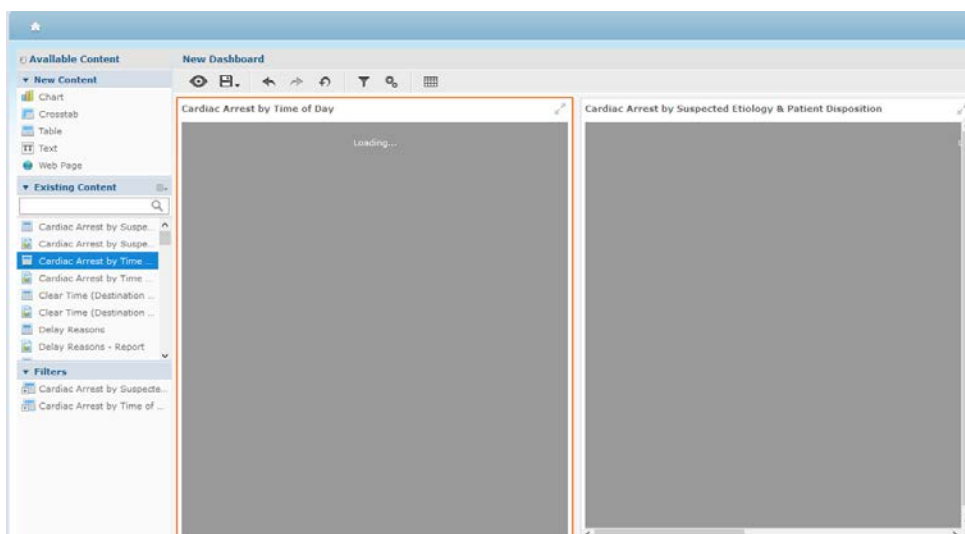
Analytics cont....

5. In the report, after generating results, the user has a wide variety of export options. The user can click the export button and choose from the best selection needed

As PDF

As Excel (Paginated)

As Excel

As CSV

As DOCX

As RTF

As ODT

As ODS

As XLSX (Paginated)

As XLSX

As PPTX

Reporting

The Reporting tab is where an assigned agency state compliancy personnel can view PCRs submitted (Closed) to iPCR Web for the purpose of creating state compliancy file to be uploaded to your states compliancy bridge as defined by your agency iPCR administrator. The content available in iPCR Web is determined by two factors. The first factor for iPCR Web content is determined by the features purchased. For the purpose of training documentation, we will be covering all potentially available sections. If you see a section of iPCR Web that is not available to you in the training document and would like to inquire about it, please contact your iPCR account manager at 800-456-2622 after first speaking with your local agency iPCR administrator. The second factor of iPCR Web content is determined by the user's security level. This program area contains the following sections:

Area	Function
New	Location where all newly closed PCRs reside and the location where the user can select one or more PCRs by using the checkboxes and the date range box and then clicking 'Generate XML' to create a NEMSIS state reporting file. The user would then upload that file to the agencies state bridge if using the manual option. All PCRs selected when using the 'Generate XML' option will automatically move to the 'Submitted' folder
Submitted	Location where all PCRs that previously were used in creation of the state compliancy XML from the 'New' folder
Modified	Location showing all PCRs that have been modified either by using the billing or CQI process after they have been included in the 'Generate XML' process to upload to the agency state bridge
All	Cumulative view showing all PCRs contained in 'New', 'Submitted' and 'Modified' folders

Reporting cont.…

Depending on your agencies state compliancy policy, iPCR has the potential to auto-submit your agencies compliancy data to the state. For more information on this feature, please contact iPCR technical support at 800-464-1740 to discuss options for you state.

Administration

The Administration tab is the main command center for setting up and customizing your account. Only iPCR administrators will have access to this area of iPCR Web. This program area contains the following sections:

Area	Function
Agency Information	Area to add all agency general information and demographics
Manage Users	Area to create new and manage existing users of the iPCR program
Security Levels	Area to create custom security levels to group managers to see specific PCRs rather than all that are available
Alerts	Area to configure alerts to be received when designated users meet defined criteria
Apparatus/Equipment	Area to add vehicle units and any equipment used in agency such as monitors
PCR	Area to configure fields and field options, required fields, drop-off and pick-up locations, physicians, protocols, medications, treatments, field names, etc… as they appear on the iPad within a PCR. Your one stop shop to configure a PCR to suite your agencies needs
Settings	Location to turn on NEMSIS 3 data and configure program options.
Supervisor Log	Access tracking log of activity within iPCR web

Administration cont.…

Agency Information

The agency information screen allows the user to edit all agency demographic and compliancy information. Notable areas in this section include:

Agency Name: Allows user to add the agency name as it will appear at the top of each PCR

Service Area States: Clicking 'View' then 'Add' to enter the State and State ID, two fields that are very important for state compliancy.

Other mandatory state compliancy fields in this section include: Agency Name, Address, City, State, Zip Code, Telephone, Service Area States, Service Area County(s), Time Zone, Daylight Saving Time Use, Primary Type of Service, National Provider Identifier, Organizational Tax Status, Fire Department ID number (if applicable), Other Types of Service, Levels of Service, Organizational Status, Organizational Type.

Administration cont.…

The manage users screen allows iPCR administration to create new iPCR users as well as manage existing users.

Adding a new user:

1. Click the green addition sign located in the upper right
2. Enter a user name. Note this is the username they will login on iPad and iPCR web. We recommend not using spaces or special characters. Another recommendation may be to use first initial last name for ease of recall later on.
3. Set 'Account Status' to enabled
4. Set Position
5. Set Security Level
6. Decide if user will have access to CQI, billing and/or receive PCR review emails by checking the appropriate box

7. Select 'Demographic Data' box

Administration cont.…

8. Enter all fields on the Demographic Data screen

You now have the ability to enter multiple emails as needed. When you set up a new user or reset the password of an existing, the email for password creation will be sent to the email entered that has the 'primary Email' option selected.

Password emails have an expiration period of 1 hour and must be addressed from computer, not cellular phone or handheld tablet. Once the user clicks the email received, they will be prompted to set their new password and must met security requirements

Administration cont....

9. Enter all applicable information in the Nemsis Required Information area

10. Enter the user's certifications in the certifications area. Users that have certification in multiple states can now enter all applicable states by clicking the green addition sign in upper right for each respective state. Click 'Save' on each certification once done filling out all applicable fields.

11. Once done entering or editing the user data, click the 'Save' button in lower right. If this is a new user, an email will be sent to the primary email address entered to allow the user to set their password. Again, this email for both new user or password reset is time sensitive and can used for the period of 1 hour from a PC. After one hours has passed, the link is no longer valid and would have to be resent by the agencies iPCR administrator by clicking manage users section, selecting the user to display their information, selecting the 'Reset password' and then clicking 'Reset' on the pop-up.

Administration cont.…

Security Levels: Security levels can be set to further define which PCRs a manager level user can view rather than allowing that user to see all. This is advantageous when trying to segment CQI manager's scope of review as you may want to set a select group of CQI managers to be able to see a specific set of PCRs each.

To create a new security level, click the green addition sign in upper right to begin the process
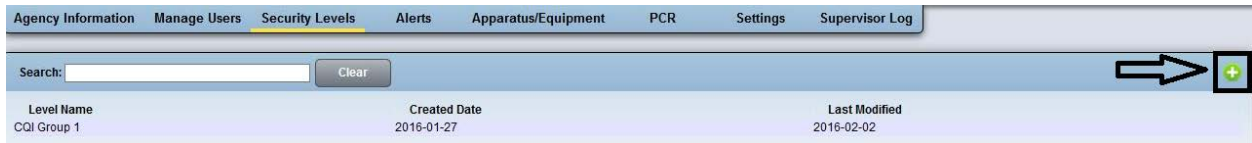
This will open the security level details to be configured at lower half of the screen

Next, provide a name for the new security level in the blank text box and then select which parameters you wish this security level to encompass. You can define from department, shift, medic unit, users and destinations. These options are cumulative. Note that you can select multiple entries by holding the control key down on your keyboard and clicking on all appropriate options needed. Once done click save.

Administration cont.…

You can now associate this security level with a manager. To do so, return to the manage user screen, select a user with a manager security level and assign the security level. Doing so ensures the manager, when logged in, will only see PCRs that meet the requirements of the security level to help specify the scope of PCRs they are responsible for reviewing. Click 'Save' once a security level has been selected for the manager

Administration cont.…

Alerts: Allow users to be notified in the event that certain conditions are met. To begin, select one of the users from the drop down list below. Only Manager level users or higher, with a valid email address entered are shown. Once you select a user you wish to set alerts for, you will see all possible alerts that can be enabled. Check the box for all alerts you would like this user to be alerted to and click 'Save' once done.

Select which items you wish this user to be alerted on

☐ Alert when a PCR is accessed more than 5 times in 1 week

☐ Alert when a PCRs Patient Information is edited

☐ Alert when Billing is processed

☐ Alert when an account is locked due to excessive login failures

[Save]

To disable any alerts this user is receiving, simply return to this area, select the same user and deselect any alerts you no longer require this user to receive.

Administration cont.…

Apparatus/Equipment: Location to add all vehicles/units and equipment such as monitors.

Apparatus: To add a new vehicle, click the green addition sign in the upper right to being the process

Next, fill out all applicable fields and click 'Save' when done

You will now see the vehicle in the list and this vehicle will be available for selection on the iPad in the 'Shift Setup' location. Remember that a vehicle and at least 1 primary care giver are required to be entered on the iPad shift setup in order to create a PCR.

Equipment: To add new equipment, click the green addition sign in the upper right to begin the process

Administration cont.…

Next, fill out all applicable fields and click 'Save' when done

You will now see the equipment added in the list. If your agency has an iPCR monitor integration, this process must be completed to allow use of the device within iPCR. For more information on adding monitor integration to iPCR or for training on the proper setup, please contact you iPCR account representative at 800-456-2622 X 2028.

Items will only in the equipment list when the vehicle they have been assigned to has been selected above in the vehicle list

Administration cont....

PCR area: Area to configure fields and field options, required fields, drop-off and pick-up locations, physicians, protocols, medications, treatments, field names, etc... as they appear on the iPad within a PCR. Your one stop shop to configure a PCR to suite your agency's needs. This area contains the following sections:

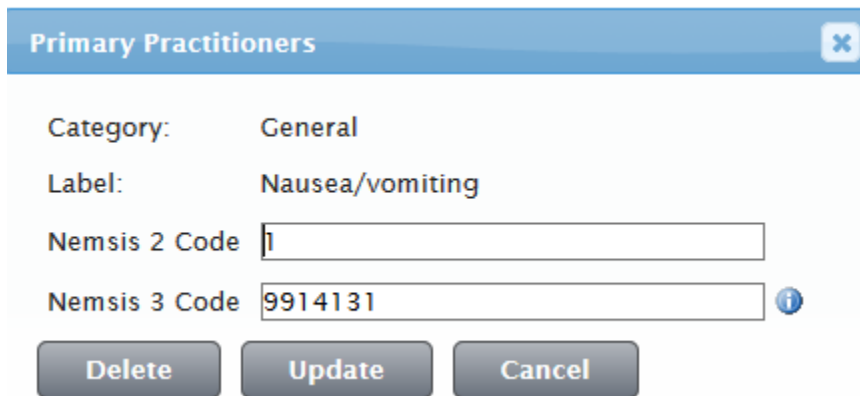| Area	Function
Physicians	Area to enter all physicians associated with the agency. Populating this area allows the physician(s) to be available for use when entering treatments and medications in a PCR
Other Fields	There are 3 sections: Treatment, Disposition and Billing. Within Treatment tab you can configure 'Protocol Used'. Within the Disposition tab you can configure the 'Destination List' and edit your disclaimers and options for 'Authorization of Care', 'Refusal of Care' and 'Transfer of Care'. Within the Billing tab you can configure 'Insurance Companies' and 'Supply Items'
Code Descriptors	Area to configure field names, required fields and available selections for all fields that have selectable options.
Treatments	Area to add or edit treatments and medications
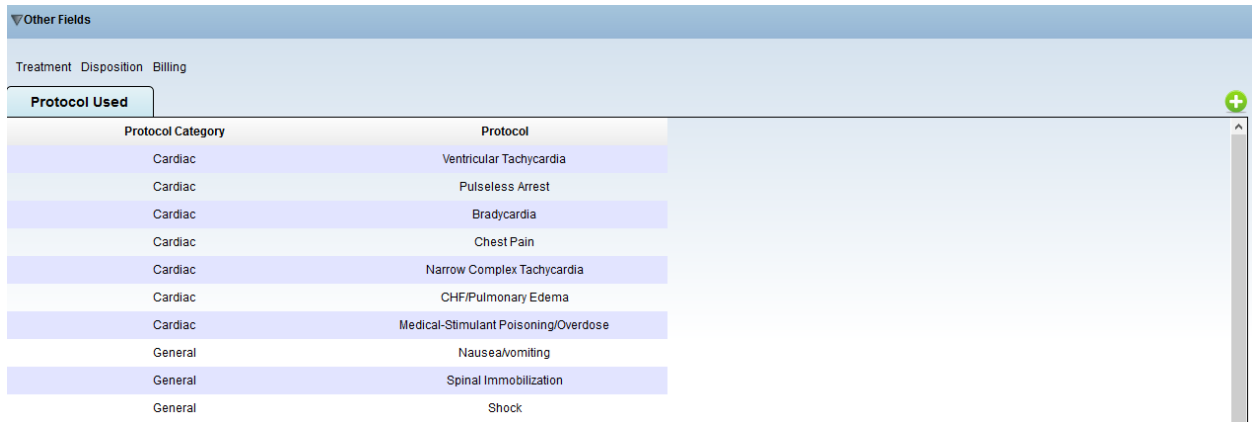
Physicians: Area to enter all physicians associated with the agency. Populating this area allows the physician(s) to be available for use when entering treatments and medications in a PCR. To add a new physician, enter the name of the physician in the text box and click the 'Add' button. If you wish to remove a physician, simply click the red minus symbol next to the name of the physician you wish to remove. Confirm the removal by clicking 'Ok'
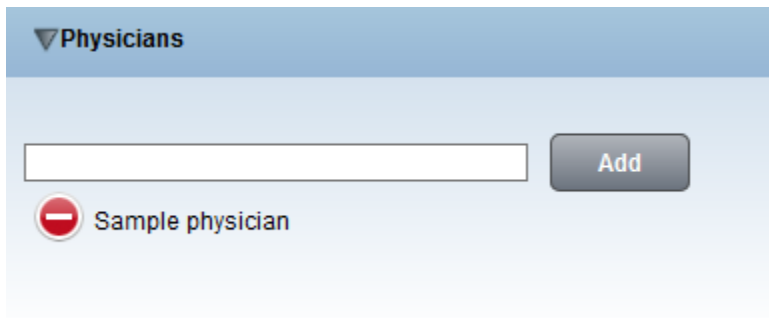
Administration cont.…

Other Fields: There are 3 sections: Treatment, Disposition and Billing. Within Treatment tab you can configure 'Protocol Used'. Within the Disposition tab you can configure the 'Destination List' and edit your disclaimers and options for 'Authorization of Care', 'Refusal of Care' and 'Transfer of Care'. Within the Billing tab you can configure 'Insurance Companies' and 'Supply Items'

Tab 1, Treatment: Allows customization of the Protocol Used field.

To add a new protocol used, click the green addition symbol in the upper right. Next, select the protocol category. Enter the label as you would like it to appear on the iPad and finally enter the Nemsis 2 and/or Nemsis 3 code as applicable. Click 'Update' once complete to save your entry.

To delete an existing protocol used, click on the selection desired. Next, click the 'Delete' button. The deleted entry will be removed from the list of available protocols.

Tab 2, Disposition: Allows customization of the Destination List, Authorization of Care statement, Refusal of Care statement and the Transfer of Care statement.

Administration cont....

Destination list: Click the 'Add' Button to create additional destinations. Fill out all pertinent fields.

Note to save time, the user will be able to populate this fax number automatically when attempting to fax a PCR from the iPad if you enter a fax number in this destination by clicking on 'Phone' and selecting phone type as 'Fax' and entering the fax number.

Administration cont.…

Authorization of Care: We have provided a sample authorization of care in this area. You can modify the existing disclaimer by clicking into the text box and making any necessary changes. Click 'Save' when done.

Sample statement currently available in this area:

SAMPLE AUTHORIZATION STATEMENT

Section I - Patient Signature

I authorize the submission of a claim for payment to Medicare, Medicaid, or any other payor for any services provided to me by (INSERT YOUR AGENCY NAME HERE) now, in the past, or in the future, until such time as I revoke this authorization in writing. I understand that I am financially responsible for the services and supplies provided to me by (INSERT YOUR AGENCY NAME HERE), regardless of my insurance coverage, and in some cases, may be responsible for an amount in addition to that which was paid by my insurance. I agree to immediately remit to (INSERT YOUR AGENCY NAME HERE) any payments that I receive directly from insurance or any source whatsoever for the services provided to me and I assign all rights to such payments to (INSERT YOUR AGENCY NAME HERE). I authorize (INSERT YOUR AGENCY NAME HERE) to appeal payment denials or other adverse decisions on my behalf without further authorization. I authorize and direct any holder of medical information or other relevant documentation about me to release such information to (INSERT YOUR AGENCY NAME HERE) and its billing agents, the Centers for Medicare and Medicaid Services, and/or any other payors or insurers, and their respective agents or contractors, as may be necessary to determine these or other benefits payable for any services provided to me by (INSERT YOUR AGENCY NAME HERE) now, in the past, or in the future.

Section II - Authorized Representative Signature

I am signing on behalf of the patient to authorize the submission of a claim for payment to Medicare, Medicaid, or any other payor for any services provided to the patient by (INSERT YOUR AGENCY NAME HERE) now, in the past or in the future (where permitted). By signing below, I acknowledge that I am one of the authorized signers listed below. My signature is not an acceptance of financial responsibility for the services rendered.

Authorized representatives include only the following individuals:

- Patients legal guardian

- Relative or other person who receives social security or other governmental benefits on behalf of the patient

- Relative or other person who arranges for the patient's treatment or exercises other responsibility for the patient's affairs

Administration cont.…

- Representative of an agency or institution that did not furnish the services for which payment is claimed (i.e., ambulance services) but furnished other care, services, or assistance to the patient

Section III - Ambulance Crew and Receiving Facility Signatures

A. Ambulance Crew Member Statement (must be completed by crew member at time of transport)

My signature below indicates that, at the time of service, the patient named above was physically or mentally incapable of signing, and that none of the authorized representatives listed in Section II of this form were available or willing to sign on the patients behalf. My signature is not an acceptance of financial responsibility for the services rendered.

B. Receiving Facility Representative Signature

The patient named on this form was received by this facility at the date and time indicated above. My signature is not an acceptance of financial responsibility for the services rendered to this patient.

Refusal of Care: We have provided a sample refusal of care in this area along with sample refusal questions. You can modify the existing disclaimer by clicking into the text box and making any necessary changes. Click 'Save' when done.

Sample statement currently available in this area:

SAMPLE REFUSAL OF CARE STATEMENT

I refuse medical treatment and/or transportation against the medical advice of the Emergency Medical Personnel. I acknowledge that I have been informed of and understand the risks and consequences involved in this refusal, up to and including death. Knowing this information, I hereby release the Emergency Medical Service Personnel of (INSERT YOU AGENCY NAME HERE) and any base hospital involved in this incident from any and all responsibilities or any ill effects which may result from my decision. I have been advised to call my physician or to go to a hospital emergency department as soon as possible. I also understand that if I change my mind or my condition becomes worse and I decide to accept treatment or transportation by the Emergency Medical Services System, I can call back and they will respond.

Question 1: Patient/Responsible Party was offered treatment and/or transport by at least two EMS professionals at Scene

Question 2: Patient is of legal age (18 or above) or emancipated minor

Administration cont.…

Question 3: Patient did not demonstrate an impaired capacity to understand the emergent nature of his/her medical condition due, but no limited to, alcohol, drugs or medications, mental illness, traumatic injury or grave disability

Question 4: Advised Patient/Responsible Party of risks and complications of refusal

Question 5: Patient/Responsible Party urged to re-contact 911 if their condition worsens

Question 6: Patient/Responsible Party states she/she understands the risks and continued to refuse

Question 7: Patient/Responsible Party advised to seek medical attention on their own if refusing care of transport

Question 8: Patient has been read the Medical Miranda

Question 9: The patient received a copy of the Ambulance Notice of Privacy Practices

Transfer of Care: We have provided a sample transfer of care in this area. You can modify the existing disclaimer by clicking into the text box and making any necessary changes. Click 'Save' when done. Checking the 'Allow Transfer of Care Signatures' check box will enable the signature pen on the iPad. When a user selects the pen, the person care is being transferred to can sign. When the option deselected, the pen icon is removed from the iPad and this person cannot sign.
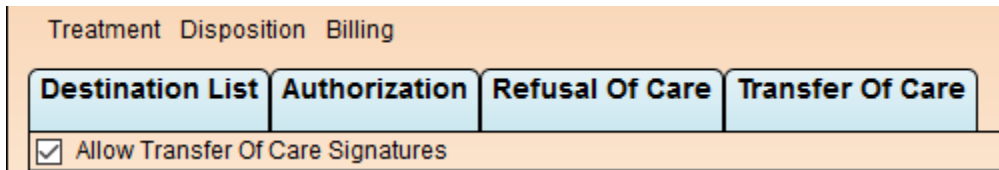
Sample statement currently available in this area:

SAMPLE TRANSFER OF CARE STATEMENT
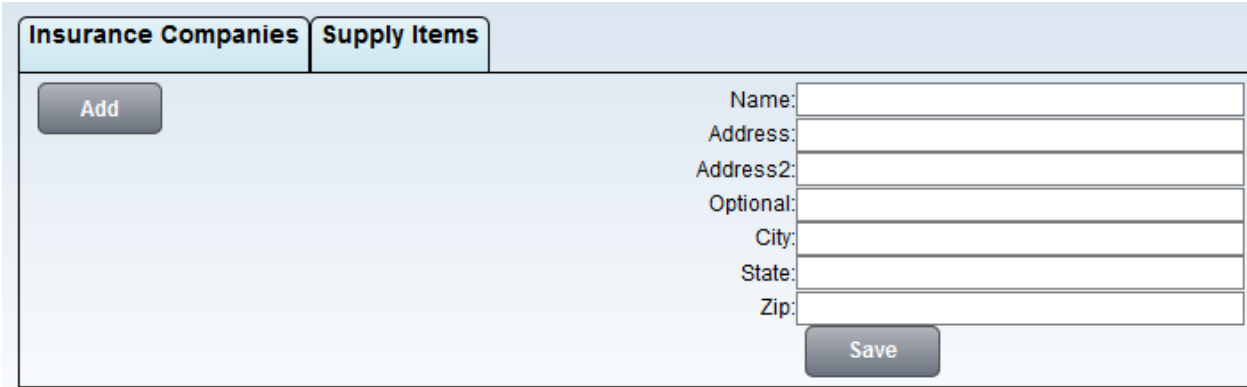
Patient care turned over to / received by:

(Please sign and print)

Administration cont.…

Tab 3, Billing: Allows customization of the Insurance companies and Supply Items.

Insurance Companies: To add an insurance company, simply click the 'Add' button. Fill out all applicable information and click 'Save' when finished.

To delete an insurance company click the red minus symbol and confirm your selection

Supply Items: To add a new supply item, simply click the 'Add' button. Fill out the supply item name and click 'Save'. This option will now be selectable in the PCR, 'Billing' section

To delete an insurance company click the red minus symbol and confirm your selection
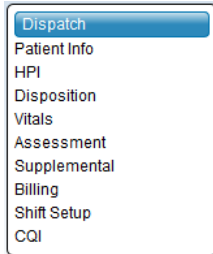
Administration cont.…
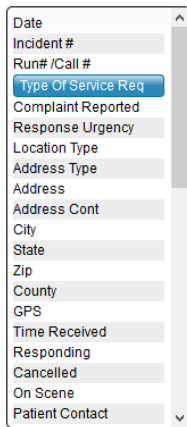
Code Descriptors: The area to configure field names, set required fields and selectable options.

Select and area of the PCR to begin
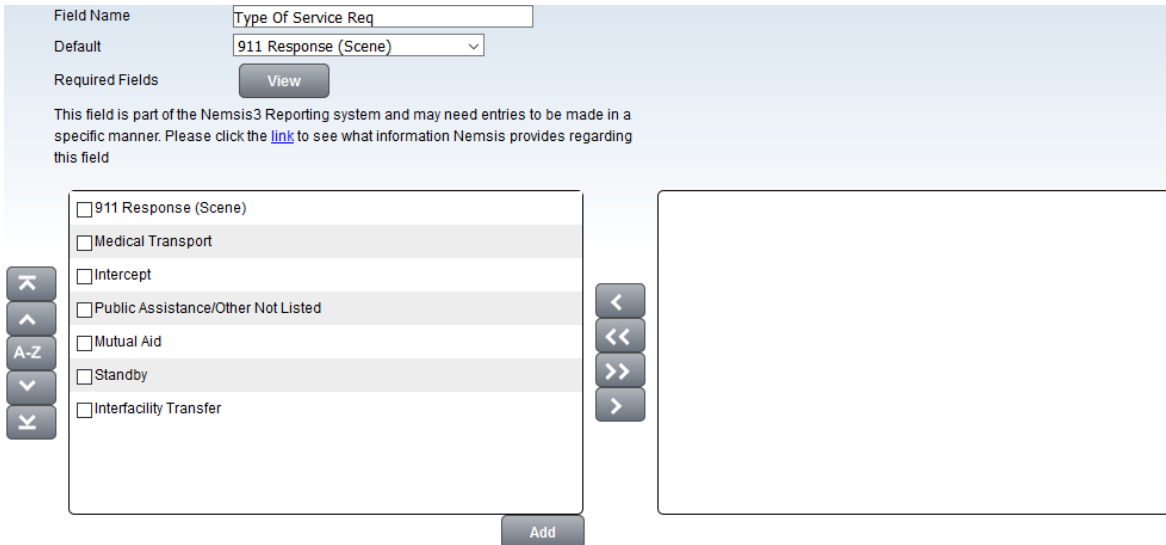
Next, select the field in that PCR section you wish to edit

You can now modify the field name, the default option, set if and when this field is required and the selectable options for the selected field

Administration cont.…

To change the field name, simply click in the 'Field Name' box and type in the new field name as you would like it to appear in the PCR on the iPad.

Field Name	Type in here to change the field name
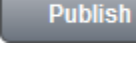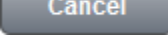
You can change the default selection for the selected field by clicking into the 'Default' drop-down menu. If you leave the option set to 'Select', the field will not have a default. If you choose from one of the present options in the drop-down menu, the field will have that option pre-selected in a PCR. Note that setting a default option for a field does not remove the other options for selection; it simply will set that entry to be pre-selected. The PCR creator can still click into that field and make a different selection if needed.

Default	----SELECT---- ⌄

You can set the selectable options of a field by either moving the options present to the active or inactive box via the navigation arrows. Please see the chart below for a listing of functions

Administration cont.…

Code Descriptor Navigation Button	Function
	Move the selected option to the top of the active list
	Move the selected option one field higher in the active list
A-Z	Sort the active list alphabetically
	Move the selected option one field lower in the active list
	Move the selected option to the bottom of the active list
<	Move the selected option left (to the active list)
<<	Move all options left (to the active list)
>>	Move all options right (to the inactive list)
>	Move the selected option right (to the inactive list)
Add	Add a new code descriptor
Publish	Publish code descriptor modifications to the iPad. No changes will take into effect on the iPad until published
Save	Save code descriptor modifications. Note that you will still have to 'Publish' them to see the change in iPCR on the iPad
Cancel	Cancel code descriptor modifications made during this session.

Adding a new code descriptor:

Add/Edit Code Descriptors ✕

Label: Name to appear on iPad

Export ID: Used only for specific integrations

Nemsis 2 Code: If reporting NEMSIS 2 to the state

Nemsis 3 Code: If reporting NEMSIS 3 to the state ⓘ

Delete   Update   Cancel

Administration cont.…

1. Click 'Add' located in bottom right of the active code descriptors box
2. Enter a label as you would like it to appear in the PCR on the iPad
3. Enter an export ID only if you have Sweetbill billing integration. If you do not have this integration, leave this field blank.
4. Enter a valid Nemsis 2 code
5. Enter a valid Nemsis 3 code if your agency submits Nemsis 3 data to the state. Note there is an information box which can be selected by clicking on the 'i' button to the right of the Nemsis 3 code box which is linked to the Nemsis 3.4.0 data dictionary entry for the selected field. The data dictionary page will show you all Nemsis allowed content for the selected field. Including allowed responses and their corresponding Nemsis 3.4.0 code.

6. Click 'Update' when you have finished adding or editing a code descriptor. Click 'Delete' to remove the selected code descriptor. Note that the 'Delete' option is only selectable once the entry has been added.
7. Click 'Publish' to push the change to the iPads for use in iPCR
8. Alternatively, you can click 'Save' to save all code descriptor changes to publish at a later time.

Administration cont....
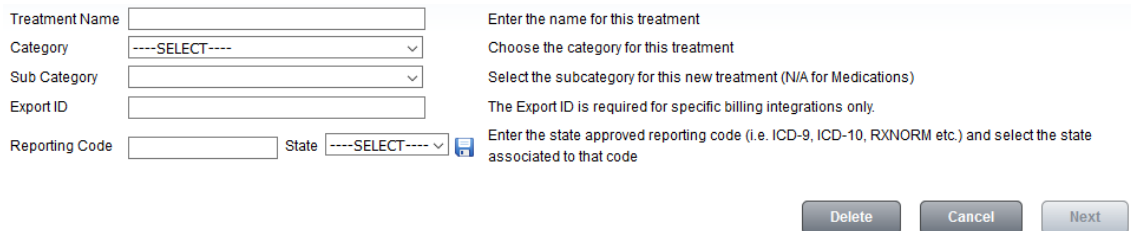
Treatment: Area to add or edit treatments and medications

To begin, you can select from the drop-down list of current treatments and medications or click the 'Start' button to add a new entry

After making your selection, you will enter the treatment wizard. The wizard has 3 sections that must be completed before the user can save or update this entry.

Treatment wizard

1.   Treatment settings: This section allows you to specify how and where this new treatment will be displayed within the treatment screen of the PCR. (All fields below, with the exception of Export ID are required before moving to the next step). The 'Next' button will not become a selectable option until the user has entered a Treatment name, selected a category and sub category and entered reporting code and state. Note that when you enter the reporting code and state you must then click the save icon to the right to lock that field into place.
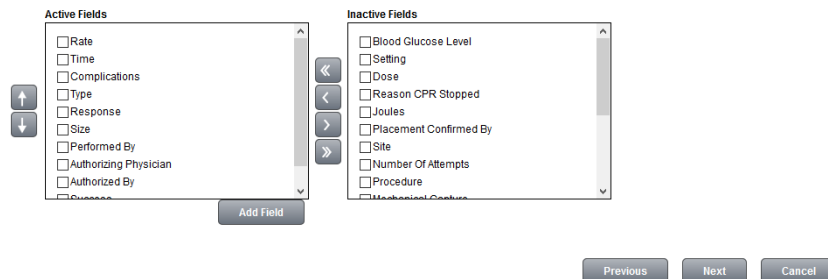

2.   Select or Create Fields: This process allows you to activate or deactivate the fields that will be available within your treatment. (Note: The Time, Success, Complication, Performed By, Authorizing By and Authorizing Physician fields are required for all created procedures and the Time, Dose, Success, Performed By, Authorized By and Authorizing Physician fields are required for all created medications in order to adhere to state or local reporting requirements.)
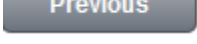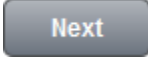
Administration cont.…

Treatment Wizard Navigation Button	Function
↑	Move the selected option one field higher in the active list
↓	Move the selected option one field lower in the active list
«	Move all options left (to the active list)
‹	Move the selected option left (to the active list)
›	Move the selected option right (to the inactive list)
»	Move all options right (to the inactive list)
Previous	Returns the user to the previous step in the treatment wizard
Next	Moves the user to the next step in the treatment wizard
Cancel	Cancels the treatment wizard and returns the user to the treatment area of iPCR web
Add Field	Add a new field for this treatment or medication

Add Field: This section will allow you to create a custom field for use within treatments. Once a field is created it will be added to the assigned list

Add Field

Create Custom Field
This section will allow you to create a custom field for use within treatments. Once a field is created it will be added to the assigned list above.

Field Name [   ]

Field Type [----SELECT---- ˅]

Field Type Example

[Add] [Close]

Enter a field name as needed to appear in the PCR and select the type of field this will be. For convenience, you will see a field type example below when you select on the various types to provide a sample of what that field type looks like. Note that this is just an example and not indicative of the options the user is in process of setting up within the treatment wizard.

Administration cont....

3. Configure Selected Fields: In this section, the contents and settings of the previously selected or created fields can be individually configured.

The user can finalize the treatment or medication by configuring each of the fields defined in step 2 of the treatment wizard. The options available for each field are dependent on the field itself. For instance, time fields allow for the entry of a time value only and cannot be configured by this utility. Performed By contains a list of all users currently configured in the iPCR system, and cannot be modified through this utility. Fields setup with single/multi select pick lists allow the user to add, edit or remove options as needed.

4. Finalizing the treatment or medication: Once you have completed all three steps, you can finalize the process by selecting the 'Create Treatment' button. This will prompt users logging in on the iPad to receive an update prompt: There is an update available. Your administrator has made changes, would you like to accept them now? Accepting the update on the iPad will bring the newly created or modified treatment to iPCR on the iPad for use.
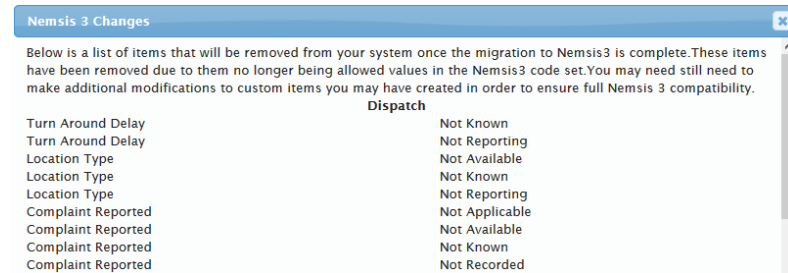
Administration cont.…

Settings: The iPCR settings area has two main areas.

Nemsis settings: This setting allows you to switch the state reporting format from Nemsis 2.2 to 3.4. Selecting and setting the option below should only be done after your state reporting agency are able to accept the Nemsis 3.4 data format. Switching to Nemsis 3.4 prior to your reporting agency being able to accept Nemsis 3.4 format data will lead to the inability to report any data to your state reporting agency.

This option CANNOT be undone

Switching to the Nemsis 3.4 format will additionally make some irreversible changes to certain aspects of the iPCR application, most notably, options available in many of the pick lists. This is due to incompatibilities between the two formats and the removal of certain data elements within the Nemsis 3 specification. A full list of all changes can be found by clicking the link provided. The list will show the user items that will be removed from your system once the migration to Nemsis3 is complete. These items will be removed due to them no longer being allowed values in the Nemsis3 code set. You may need to still need to make additional modifications to custom items you may have created in order to ensure full Nemsis 3 compatibility.

Please be advised that once this process has been completed, you will be automatically logged out, to allow the system to refresh all of its information on next login.

Administration cont.…

Application settings: Allows the agency to customize specific features and behavior of the program and functionality

Application Setting	Function
Clear Shift Setup on iPad after PCR Submission	This option will clear the Shift Setup screen on the iPad whenever a PCR is submitted and closed.
Check Required Fields on iPad when `Save To Server` is pressed or a PCR is faxed/printed	This option will check the PCR for all required fields before it can be saved to server. Unchecking this option causes the required fields check to only be performed on Submit and Close.
Allow PCR attachments from iPad Camera Roll	This option will allow iPad users to attach documents to the PCR that were taking using the standard iPad camera app.
Do not show location list in Dispatch screen (when selecting Location Type)	Disabling this feature will allow users to see the Destination list when choosing a Location Type from the Dispatch screen. This may be useful if you often pickup patients from the same locations.
iPad auto logout delay time (in seconds)	This option will control the number of seconds before the iPCR application on the iPad auto logs out. This setting does not affect the iPad's own timeout function which may also force an application logout.
Allow filtering of Web Portal Billing screen by Disposition	This option will add a 'Filter By Disposition' option to the top of the iPCR Web Portal's billing window; allowing users to only see PCR's that have a specific Disposition set.
Enforce Treatment Performed by values to allowed personnel	This option will limit the 'Performed By' list in the iPCR Treatment screen to users who are allowed to perform the given procedure. You must configure which Certification levels are allowed to perform the medication or procedure via the 'EMS Agency Procedures' and 'EMS Agency Medications' options within the 'Agency Configuration' section of the Web Portals 'Agency Information' screen, and additionally set each users 'Position' to one of the Certification levels for this feature to work. Failure to configure these items correctly will cause the Performed By list to show incorrect (or potentially no) values.
Validate all PCR's automatically against the Nemsis3 Specifications prior to submission	This option will cause the program to automatically validate PCR's against all applicable state requirements for Reporting (Nemsis 3) compliance before the PCR can be closed. Disabling this feature will allow PCRs to be closed without meeting the state requirements; however these PCRs may be unsuitable for your state reporting agency and may be rejected.

Administration cont.…

Supervisor Log: The supervisor log tracks many different activities performed within the iPCR web. The logged event will show you the date, event type, IP address of the computer used to perform the action, event details and the user who performed the action. The logs can be searched using keywords in the search box and can be filtered by adjusting the between dates and clicking 'Search'.

The program logs the following event types:

Event Type	Function
Nemsis 3 Activation	Logs when an iPCR administrator has enabled Nemsis 3 data
Account Creation	Logs when an new iPCR user has been created
Password Reset	Logs when an iPCR user has a password reset
Email Change	Logs when an email address has been changed on an iPCR user
Record Access	Logs when an iPCR user accesses a PCR