



Shared health
Soins communs
Manitoba

Public Health Information Management System (PHIMS)



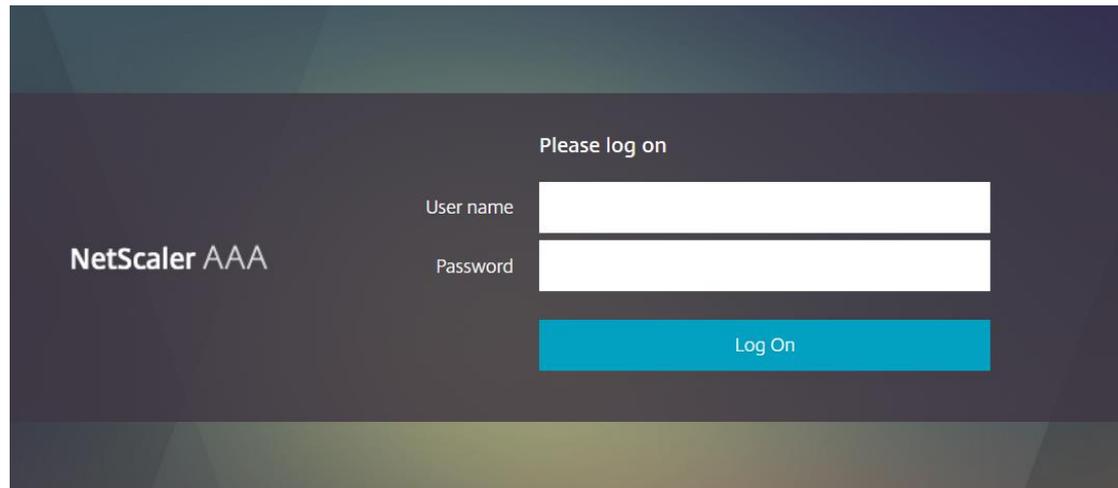
Module 3: How to Set Up User Defaults

Setting Up User Defaults

Click on the PHIMS link that was sent to you by email

<https://phims.sharedhealthmb.ca>

Log in as per instructions outlined in Module 2:



The image shows a login interface for NetScaler AAA. On the left, the text "NetScaler AAA" is displayed. On the right, the text "Please log on" is positioned above two input fields. The first field is labeled "User name" and the second is labeled "Password". Below these fields is a blue button labeled "Log On".

Setting Up User Defaults

Step 1:

Click on the "My Account" button at the top of the page.

PANORAMA
Public Health Solution for
Disease Surveillance and Management

Help Contact Us **My Account** Change Role Logout

IMMUNIZATION

The Public Health Solution for Disease Surveillance and Management supports the identification, management and control of infectious diseases and outbreaks that pose a threat to the public's health.

Specify your Service Delivery Location (SDL).

Service Delivery Location: Manitoba Health SDL Select

SDL Time Zone: CST

Personal WorkLoads
View all your assigned work tasks

Reporting
Specify and view client specific and aggregate reports.

Document Management
Add, update, delete and search for electronically attached documents

Notifications
Create and view jurisdiction and threshold notifications.

Need Help ?
Contact information for the Help Desk

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December 2019						
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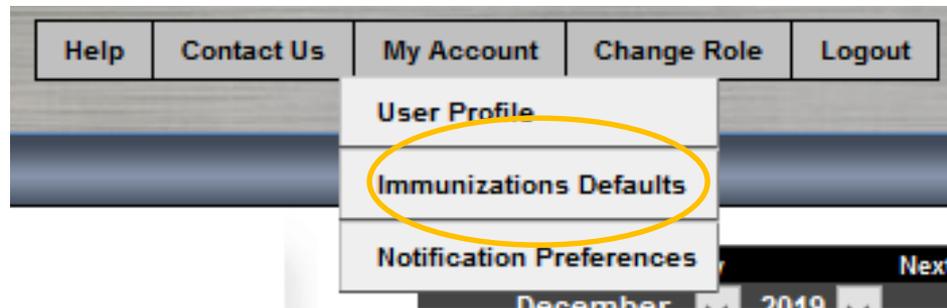
External Reference Links
LINKS WILL OPEN A NEW WINDOW

No Reference Link has been added

Setting Up Immunization Defaults

Step 2:

Select “Immunization Defaults”.

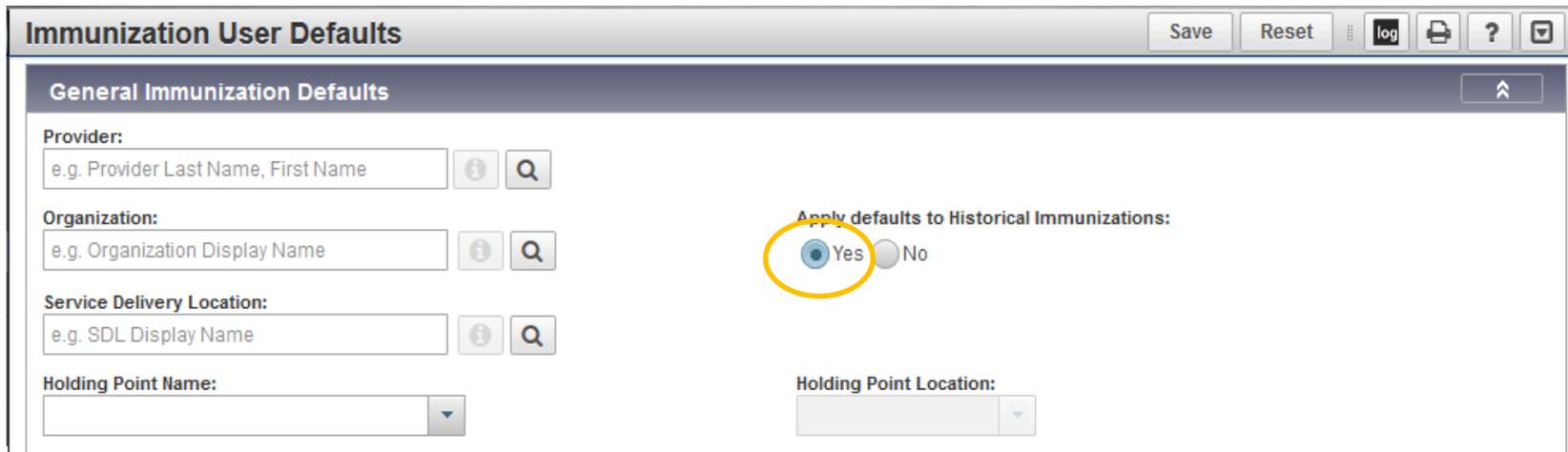


Once the default settings are set up, **every entry that you make in PHIMS will be “stamped” with the information** contained in the default settings.

Setting Up Immunization Defaults

Step 3:

Leave "Provider" blank as this will auto-populate from your log in information.



The screenshot shows a web application window titled "Immunization User Defaults". At the top right, there are buttons for "Save", "Reset", "log", a printer icon, a help icon, and a close icon. Below the title bar is a section titled "General Immunization Defaults" with an upward arrow icon. The form contains several input fields and a radio button group:

- Provider:** A text input field with the placeholder "e.g. Provider Last Name, First Name", an information icon, and a search icon.
- Organization:** A text input field with the placeholder "e.g. Organization Display Name", an information icon, and a search icon.
- Service Delivery Location:** A text input field with the placeholder "e.g. SDL Display Name", an information icon, and a search icon.
- Holding Point Name:** A dropdown menu.
- Holding Point Location:** A dropdown menu.
- Apply defaults to Historical Immunizations:** A radio button group with "Yes" selected (circled in yellow) and "No" unselected.

Click the **"Yes"** button beside "Historical Immunizations" and ignore Holding Point Name and Holding Point Location as they do not apply for non public health users.

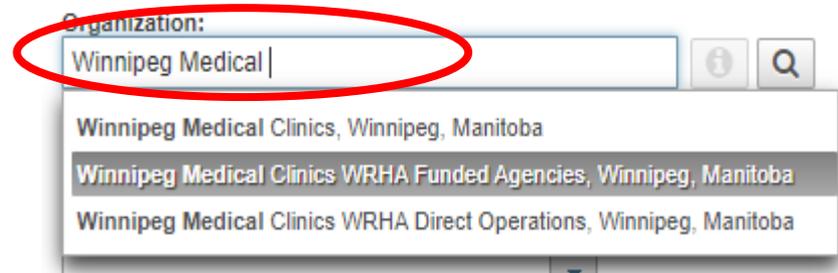
Setting Up “Organization” Default Setting

Step 4:

The Organization represents the “people” providing the service. This could be your Regional Health Authority (eg. Winnipeg Regional Health) or your affiliated organization (eg. Winnipeg Medical Clinics WRHA Funded Agencies).

Start to type the name of your Organization.

1. For Winnipeg RHA type **Winnipeg**
2. For Southern Health – Santé Sud type **Southern**
3. For Interlake Eastern RHA type **Interlake**
4. For Northern RHA type **Northern**
5. For Prairie Mountain Health type **Prairie**
6. For private physician offices, select **Manitoba Physicians**
7. For correctional facilities, select **Manitoba Corrections**



Setting Up “Organization” Default Setting

Step 5:

Select the correct name from the drop down list that reflects the program area that you are entering on behalf of.

1. Remember, you must select the name from the drop down menu versus typing in the full name.
2. For example, select **Winnipeg Medical Clinics WRHA Funded Agencies**, if you are entering on behalf of one of the Winnipeg Medical Clinics WRHA funded agencies (eg. Klinik)

Organization:

Winnipeg Medical Clinics, Winnipeg, Manitoba

Winnipeg Medical Clinics WRHA Funded Agencies, Winnipeg, Manitoba

Winnipeg Medical Clinics WRHA Direct Operations, Winnipeg, Manitoba

Setting Up “Service Delivery Location (SDL)” Default Setting

Step 6:

The Service Delivery Location (SDL) represents “where” the service is taking place (eg. medical clinic).

Start to type the name of the location where the service was delivered. For example, if the immunization was delivered at the Klinik Community Health Centre, start typing “Klinik”.

Service Delivery Location:

ⓘ 🔍

- Klinik Student Health Services, Winnipeg, Manitoba
- Klinik Community Health Centre, Winnipeg, Manitoba**



Step 7:

Select the correct name from the drop down list.

You must select the name from the drop down menu versus just typing the name in full.

Setting Up “Provider” Default Setting

*****This step is optional.*** Advance to Step 10 if you do not want to document the Provider’s name.

It is not necessary to record the name of the provider but if you would like to record the name of the provider that administered the immunization, refer to Steps 8 & 9.

Setting Up “Provider” Default Setting

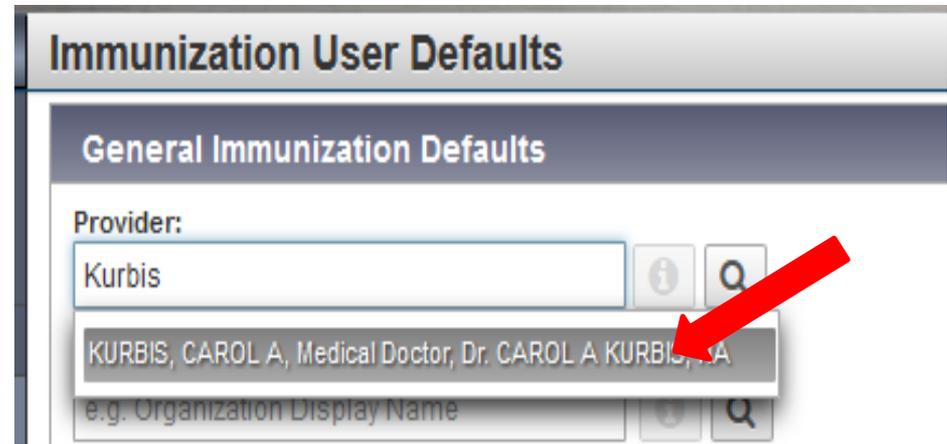
Step 8:

Start to type the Surname of the provider that administered the immunization.

Step 9:

Select the correct name from the drop down list.

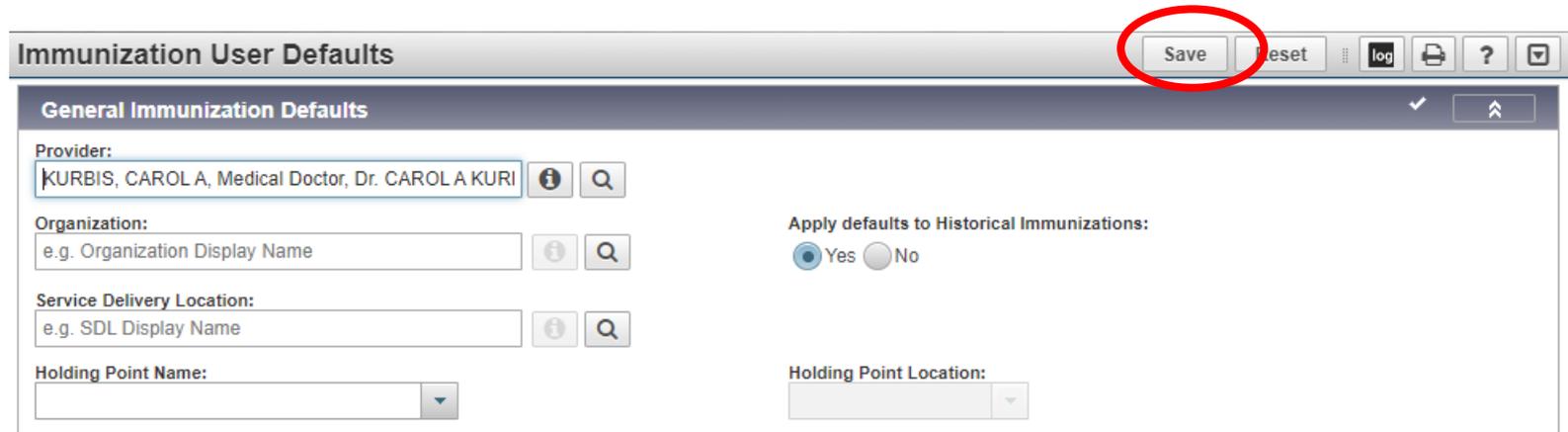
You must select the name from the drop down menu versus just typing the name in full.



The screenshot shows a web interface titled "Immunization User Defaults". Under the "General Immunization Defaults" section, there is a "Provider:" label above a text input field containing "Kurbis". To the right of the input field are two buttons: an information icon (i) and a search icon (Q). A dropdown menu is open below the input field, displaying a list of search results. The first result is highlighted and has a red arrow pointing to it: "KURBIS, CAROL A, Medical Doctor, Dr. CAROL A KURBIS, SA". Below this, there is a partially visible result: "e.g. Organization Display Name".

Setting Up Immunization Defaults

Step 10:



The screenshot shows a web interface for "Immunization User Defaults". At the top right, there is a toolbar with buttons for "Save", "Reset", "log", a printer icon, a help icon, and a refresh icon. The "Save" button is circled in red. Below the toolbar is a section titled "General Immunization Defaults" with a checkmark and an up arrow icon. The form contains several fields: "Provider:" with a text input containing "KURBIS, CAROL A, Medical Doctor, Dr. CAROLA KURI" and search/info icons; "Organization:" with a text input containing "e.g. Organization Display Name" and search/info icons; "Service Delivery Location:" with a text input containing "e.g. SDL Display Name" and search/info icons; "Holding Point Name:" with a dropdown menu; and "Holding Point Location:" with a dropdown menu. To the right of the "Organization:" field is a section titled "Apply defaults to Historical Immunizations:" with radio buttons for "Yes" (selected) and "No".

Once your defaults have been set, click "Save" at the top of the page.

Verify Immunization Defaults

Step 11:

Verify that your user default settings are correct. If they are not correct, complete steps 1 through 10 again.

*Refer to the Email sent to you from the PHIMS support team via your Account Requestor. This email will have a 'snap shot' to show you how your defaults should be set. (If you did not receive the email please check with your Account Requestor.)

Example of Immunization Defaults for a user at Klinik Community Health Centre entering immunizations for the Winnipeg Medical Clinic WRHA Funded Agency:

General Immunization Defaults ✓ ⬆

Provider:
e.g. Provider Last Name, First Name ⓘ 🔍

Organization:
Winnipeg Medical Clinics WRHA Funded Agencies, Win ⓘ 🔍

Service Delivery Location:
Klinik Community Health Centre, Winnipeg, Manitoba ⓘ 🔍

Holding Point Name: ▾

Holding Point Location: ▾

Apply defaults to Historical Immunizations:
 Yes No

Changing Immunization Defaults

Note:

*If you are entering immunizations that are NOT given by your Organization at your Service Delivery Location (SDL), you will need to *change and enter the correct Organization and SDL*. This is imperative to ensure the client record is accurate and complete.

For example, if you want to enter an immunization that was given in India, you would clear your default settings and enter the correct Organization and SDL (eg. Out of Province). Otherwise, the record will indicate that someone from your organization administered that immunization.

Organization:



Service Delivery Location:



Points to Remember

- Once the default settings are set up, every entry that you make will be “stamped” with the information contained in the default settings.
- The “Provider” default setting can be left blank.
- If you choose to set up the Provider setting, it is important to remember to always clear/update the defaulted “Provider” setting when you are finished entering information for a specific provider.
- If you are entering information/immunizations on behalf of another Organization and SDL or entering an immunization that was given elsewhere, *it is important to clear your default settings and enter the correct Organization and SDL.*
- It is important to remember to always clear/update to the default setting when you are finished entering information for another program area.

Questions

If you have any questions, contact Digital Health

- Email: servicedesk@sharedhealthmb.ca
- Phone: 204-940-8500 or 1-866-999-9698