Points to Remember

Ensure you are using a corporately managed device
Prework:
- Scan the document
- Save as PDF document
- Ensure the document is no more than 5MB

The system CANNOT prevent you from uploading a Cohort document to a client only context. ALL PHIMS users are able to see documents attached with only a client in context. You MUST ensure that the applicable Cohort is in context prior to uploading a document.
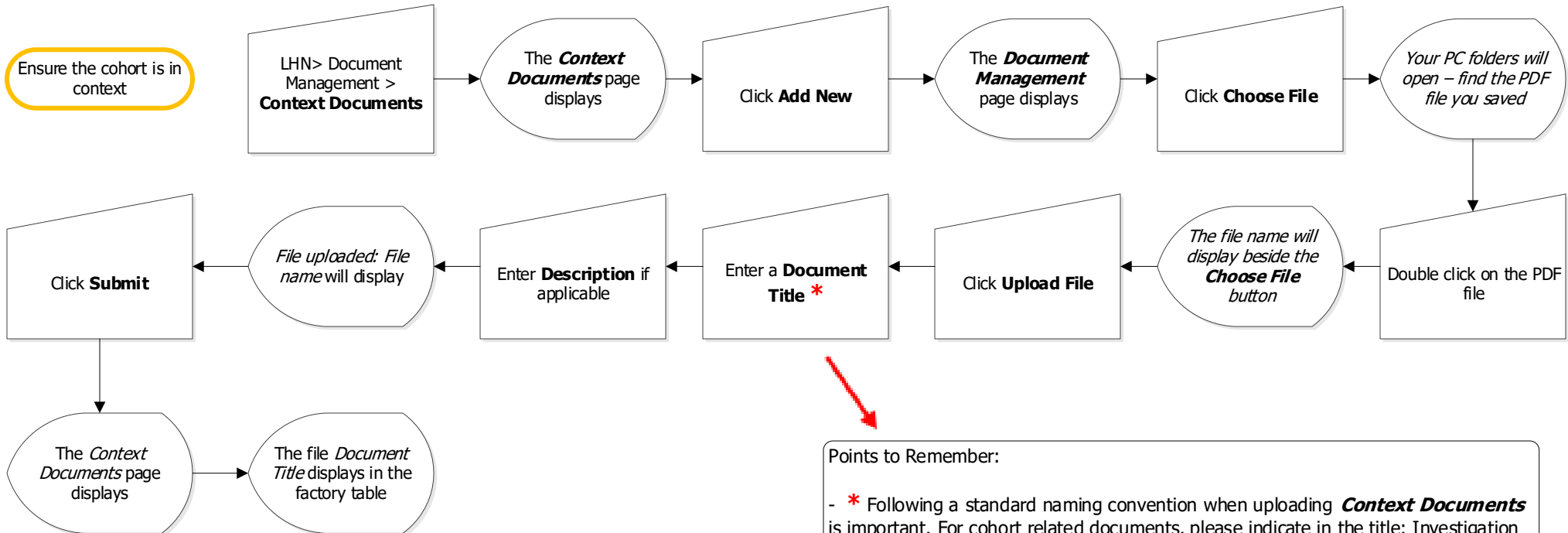
Uploading a document does not replace entering the minimum required data elements into PHIMS. Please ensure complete and accurate data entry into mandatory fields as per MB Health Surveillance Unit direction found here: https://www.gov.mb.ca/health/publichealth/surveillance/forms.html

Ensure the cohort is in context

→ LHN> Document Management > **Context Documents**

→ The **Context Documents** page displays

→ Click **Add New**

→ The **Document Management** page displays

→ Click **Choose File**

→ *Your PC folders will open – find the PDF file you saved*

↓

Double click on the PDF file

← *The file name will display beside the* **Choose File** *button*

← Click **Upload File**

← Enter a **Document Title** *

← Enter **Description** if applicable

← *File uploaded: File name will display*

← Click **Submit**

↓

The *Context Documents* page displays

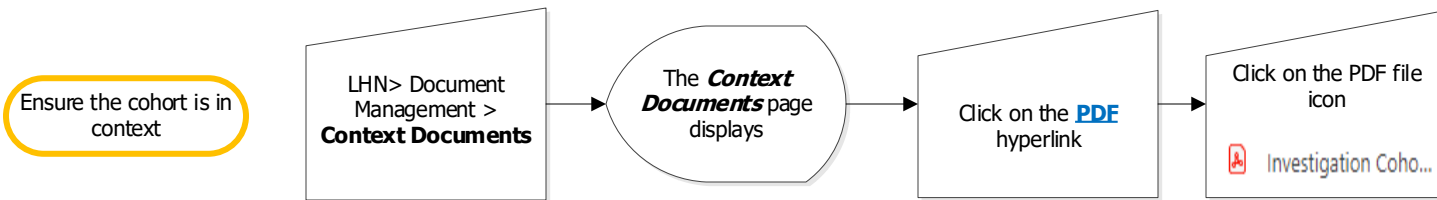→ The file *Document Title* displays in the factory table

Points to Remember:

- * Following a standard naming convention when uploading **Context Documents** is important. For cohort related documents, please indicate in the title: Investigation and the Cohort ID number (eg. **Investigation, Cohort ID 1234**)
- *Author a Note* to notify other users that a document has been uploaded. Create the note within the client's file and enter the *Document title* in the **Subject Line**

View

Ensure the cohort is in context → LHN> Document Management > **Context Documents** → The **Context Documents** page displays → Click on the **PDF** hyperlink → Click on the PDF file icon — Investigation Coho...

Delete

Ensure the cohort is in context → LHN> Document Management > **Context Documents** → The **Context Documents** page displays → Select the radio button beside the Document Title to be deleted → Click **Delete** → *'Remove the selected item(s)?'* message displays → Click **OK**