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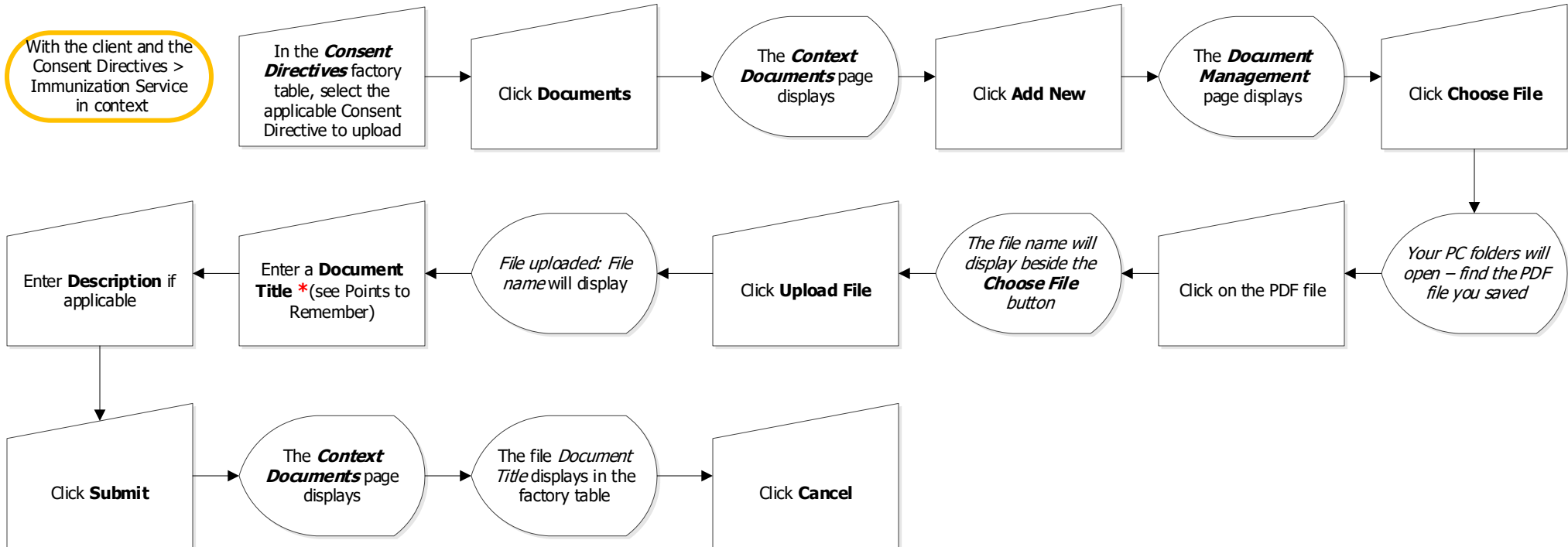
Ensure you are using a corporately managed device
Prework:
- Scan the document
- Save as PDF document
- Ensure the document is no more than 5MB

The system CANNOT prevent you from uploading a Consent Directive 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 Consent Directive 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
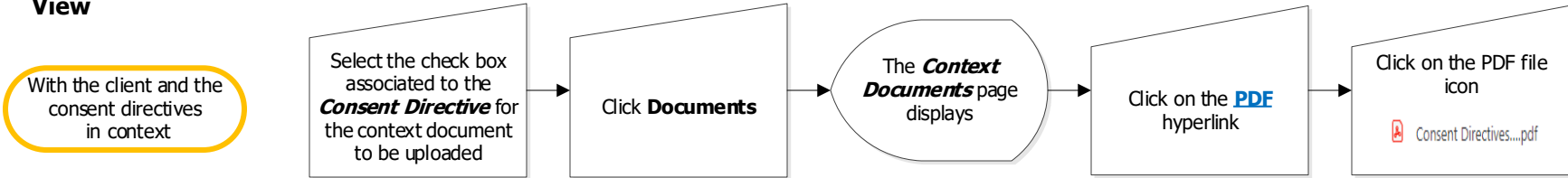
With the client and the Consent Directives > Immunization Service in context → In the **Consent Directives** factory table, select the applicable Consent Directive to upload → Click **Documents** → The **Context Documents** page displays → Click **Add New** → The **Document Management** page displays → Click **Choose File**

↓

Enter **Description** if applicable ← Enter a **Document Title** *(see Points to Remember) ← File uploaded: File name will display ← Click **Upload File** ← The file name will display beside the **Choose File** button ← Click on the PDF file ← Your PC folders will open – find the PDF file you saved

↓

Click **Submit** → The **Context Documents** page displays → The file Document Title displays in the factory table → Click **Cancel**
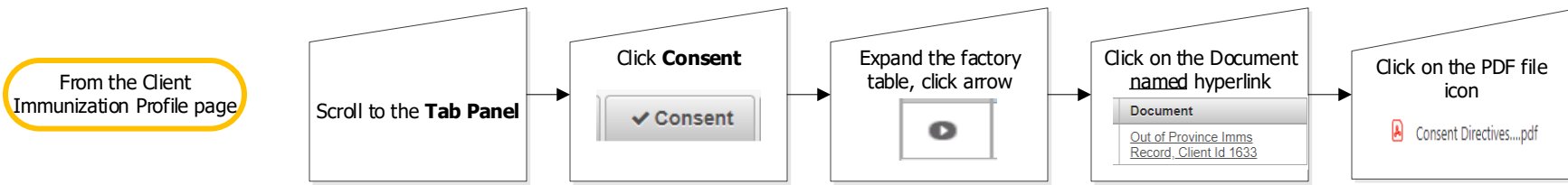

Points to Remember:

- ***It is important to follow a standard naming convention when uploading **Context Documents**.
- For Consent Directive related documents, please indicate in the title: Consent Directive and the Client ID number (e.g. **Consent Directive, Client ID 123456**)
- **Author a Clinical 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**

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View

With the client and the consent directives in context

→ Select the check box associated to the **Consent Directive** for the context document to be uploaded

→ Click **Documents**

→ The **Context Documents** page displays

→ Click on the **PDF** hyperlink

→ Click on the PDF file icon

📄 Consent Directives....pdf

OR

From the Client Immunization Profile page

→ Scroll to the **Tab Panel**

→ Click **Consent**

✓ Consent

→ Expand the factory table, click arrow

▶

→ Click on the Document named hyperlink

Document
Out of Province Imms Record, Client Id 1633

→ Click on the PDF file icon

📄 Consent Directives....pdf

Delete

With the client and the consent directives in context

→ Select the check box associated to the **Consent Directive** for the context document to be uploaded

→ Click **Documents**

→ The **Context Documents** page displays

→ Select the check box beside the *Document Title* to be deleted

→ Click **Delete**

→ *'Remove the selected item(s)?'* message displays

↓

Click **OK**

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