



Shared health
Soins communs
Manitoba

Public Health Information Management System (PHIMS)



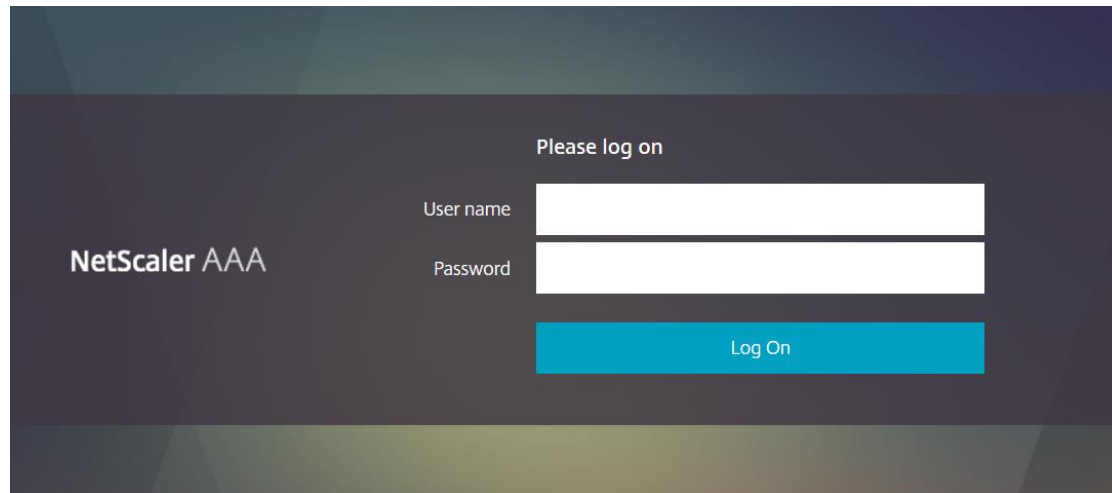
Module 3: How to Set Up User Defaults

Setting Up User Defaults

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

<https://panorama.manitoba-ehealth.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

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.

External Reference Links
LINKS WILL OPEN A NEW WINDOW

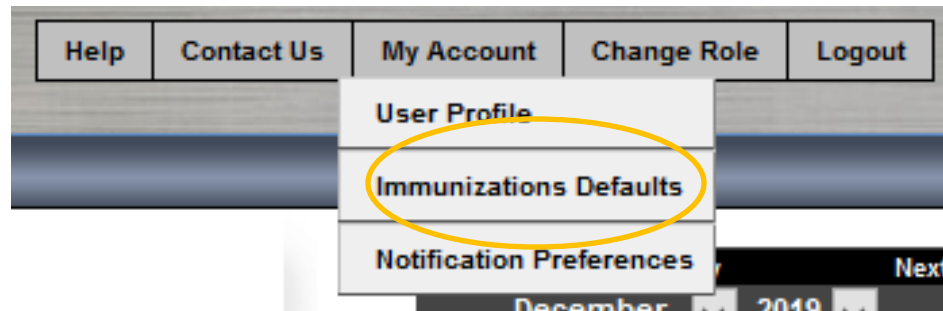
No Reference Link has been added

Need Help ?
Contact information for the Help Desk

Setting Up Immunization Defaults

Step 2:

Select “Immunization Defaults”

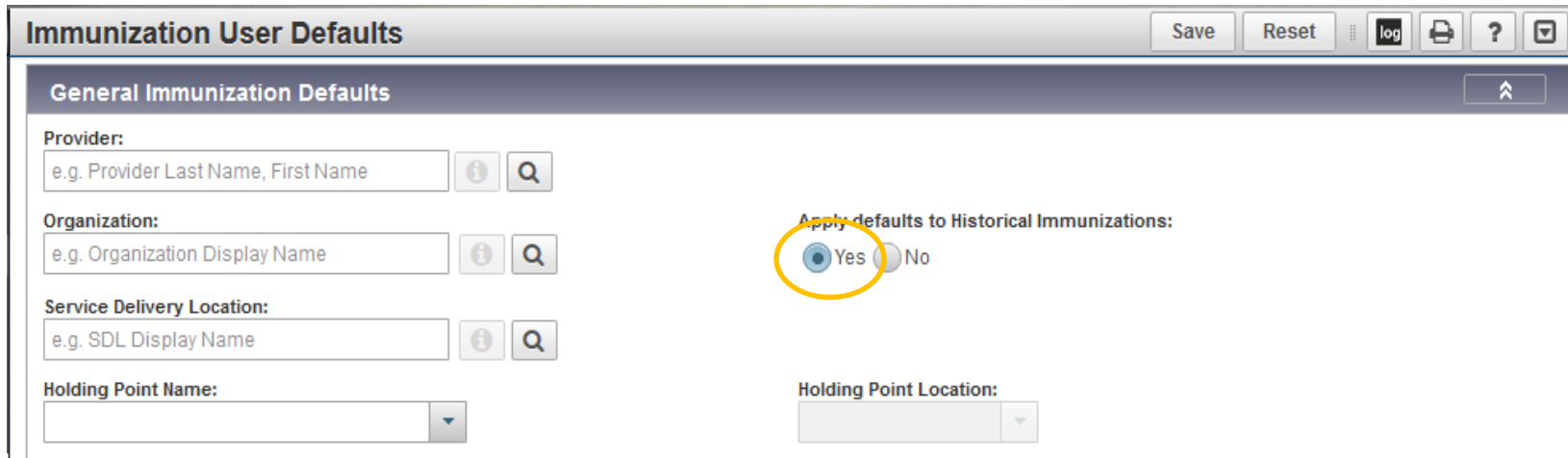


Once the default settings are set up, **every entry that you make in PHIMS will be “stamped” with the information** contained in the default settings.

Setting Up Immunization Defaults

Step 3:

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



The screenshot shows the 'Immunization User Defaults' configuration window. The 'General Immunization Defaults' section contains the following fields:

- Provider:** Text input field with placeholder 'e.g. Provider Last Name, First Name' and search icons.
- Organization:** Text input field with placeholder 'e.g. Organization Display Name' and search icons.
- Service Delivery Location:** Text input field with placeholder 'e.g. SDL Display Name' and search icons.
- Holding Point Name:** Dropdown menu.
- Holding Point Location:** Dropdown menu.

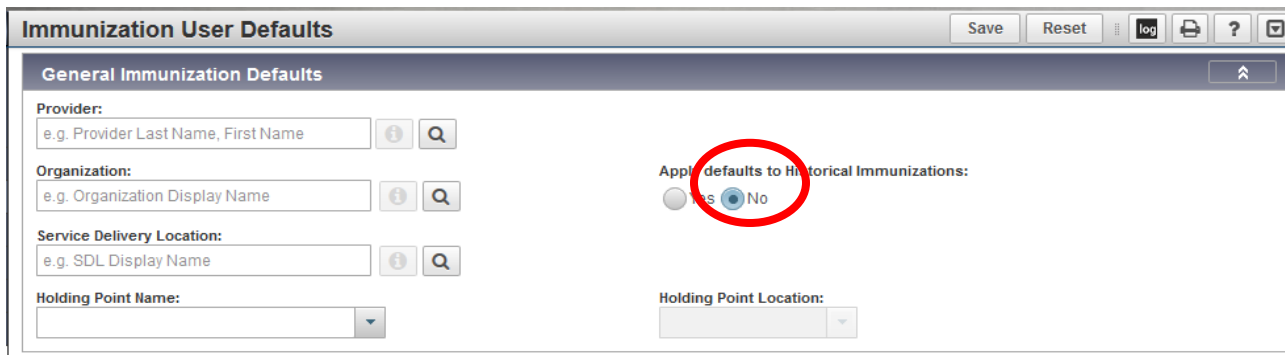
The 'Apply defaults to Historical Immunizations:' section has two radio buttons: 'Yes' (selected and circled in yellow) and 'No'.

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 Immunization Defaults

Note:

*If you are entering an immunization that was given elsewhere, it is important to temporarily switch the historical immunization default to "No". For example if you want to enter an immunization that was given in India, you would temporarily change the historical immunization default to 'No'. Otherwise the record will indicate that someone from your organization administered the immunization.



The screenshot shows a web application window titled "Immunization User Defaults". The window has a toolbar with buttons for "Save", "Reset", "log", a printer icon, a help icon, and a refresh icon. Below the toolbar is a section titled "General Immunization Defaults" with a scroll-up arrow. The form contains several input fields: "Provider:" (text input with placeholder "e.g. Provider Last Name, First Name"), "Organization:" (text input with placeholder "e.g. Organization Display Name"), "Service Delivery Location:" (text input with placeholder "e.g. SDL Display Name"), and "Holding Point Name:" (dropdown menu). To the right of these fields is a radio button group labeled "Apply defaults to Historical Immunizations:" with two options: "Yes" and "No". The "No" radio button is selected and circled in red. Below this group is a "Holding Point Location:" dropdown menu.

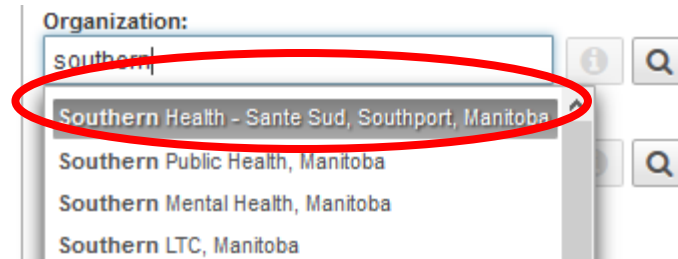
If you switch historical immunization to "NO" **it is very important to immediately switch back to "YES" once you have recorded the immunization.**

Setting Up “Organization” Default Setting

Step 5:

Start to type the name of the health region that your organization falls in.

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**

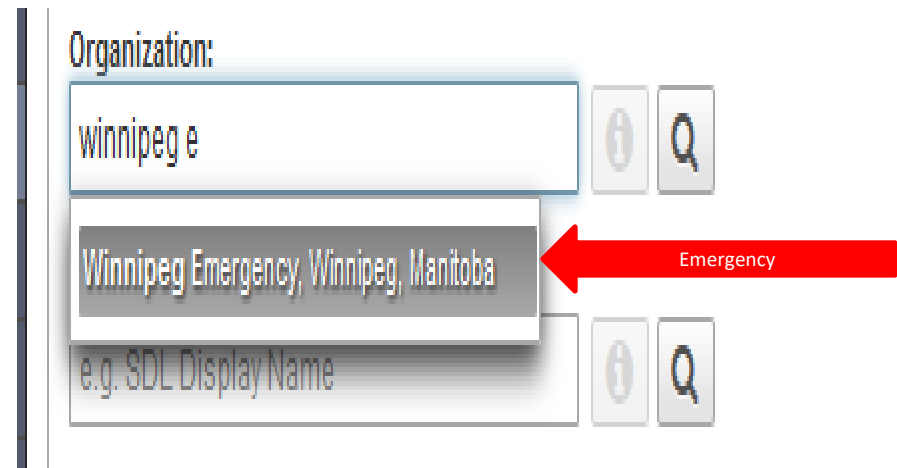


Setting Up “Organization” Default Setting

Step 6:

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 Emergency, Winnipeg, Manitoba** if you are entering on behalf of the WRHA Emergency Program



The screenshot shows a web form with the label "Organization:". Below the label is a text input field containing "winnipeg e". To the right of the input field are two icons: a person icon and a magnifying glass icon. A dropdown menu is open below the input field, showing three options: "Winnipeg Emergency, Winnipeg, Manitoba", "e.g. SDL Display Name", and another option partially visible. A red arrow points from the right towards the first option in the dropdown menu, with the word "Emergency" written in white text above the arrow.

Setting Up "Organization" Default Setting

Step 7:


Click "Select"

Organization: Manitoba Corrections

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Clear

Find 

Close 

Type

Search

*Start typing the name of the Organization. Matches will begin to appear below.
Select the match with the keyboard or mouse.*

Organization Name:

Winnipeg Emergency, Winnipeg, Manitoba

Show Info

Select

Setting Up “Service Delivery Location” Default Setting


Step 8:

Click the “Find” button beside “Service Delivery Location”

To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Clear

Service Delivery Location: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 3 Location]

Find 



Setting Up “Service Delivery Location” Default Setting

Step 9:

Start to type the name of the location where the service was delivered.

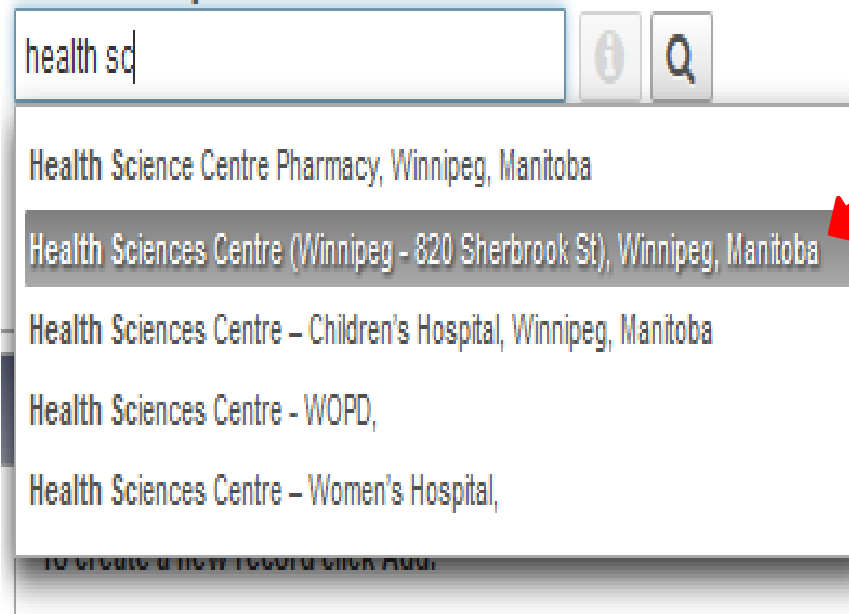
For example if the immunization was delivered at the Health Sciences Centre in Winnipeg, select HSC Winnipeg.

Step 10:

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

Service Delivery Location:



The screenshot shows a search interface with a text input field containing 'health sc'. To the right of the input field are two buttons: an information icon (i) and a search icon (Q). Below the input field is a dropdown list of search results. The first result is 'Health Science Centre Pharmacy, Winnipeg, Manitoba'. The second result, 'Health Sciences Centre (Winnipeg - 820 Sherbrook St), Winnipeg, Manitoba', is highlighted in grey and has a red arrow pointing to it from the right. Other results include 'Health Sciences Centre - Children's Hospital, Winnipeg, Manitoba', 'Health Sciences Centre - WOPD,', and 'Health Sciences Centre - Women's Hospital,'. At the bottom of the dropdown, there is a link that says 'To create a new record click Add.'

Setting Up “Service Delivery Location” Default Setting

Step 11:

Click “Select”

*Start typing the name of the Service Delivery Location. Matches will begin to appear below.
Select the match with the keyboard or mouse.*

SDL Name:

Setting Up “Provider” Default Setting

Step 12:

***This step is optional. Advance to Step 15 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, click the “Find” button beside “Provider”

Setting Up "Provider" Default Setting

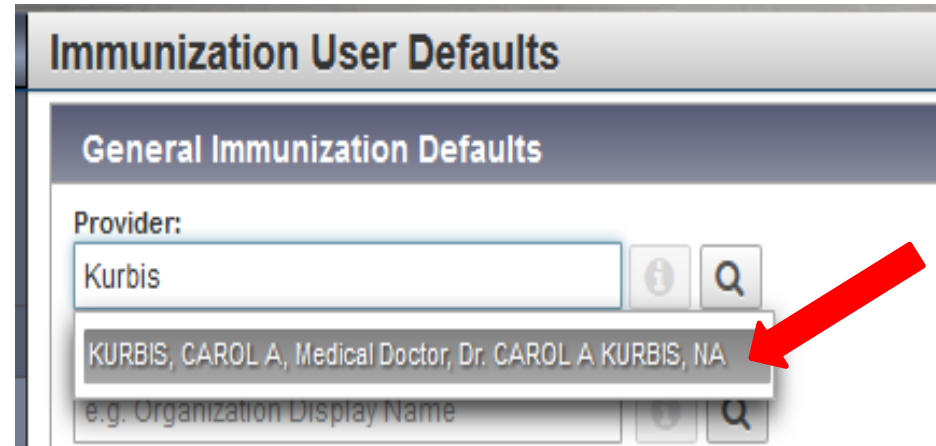
Step 13:

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

Step 14:

Select the correct name from the drop down list

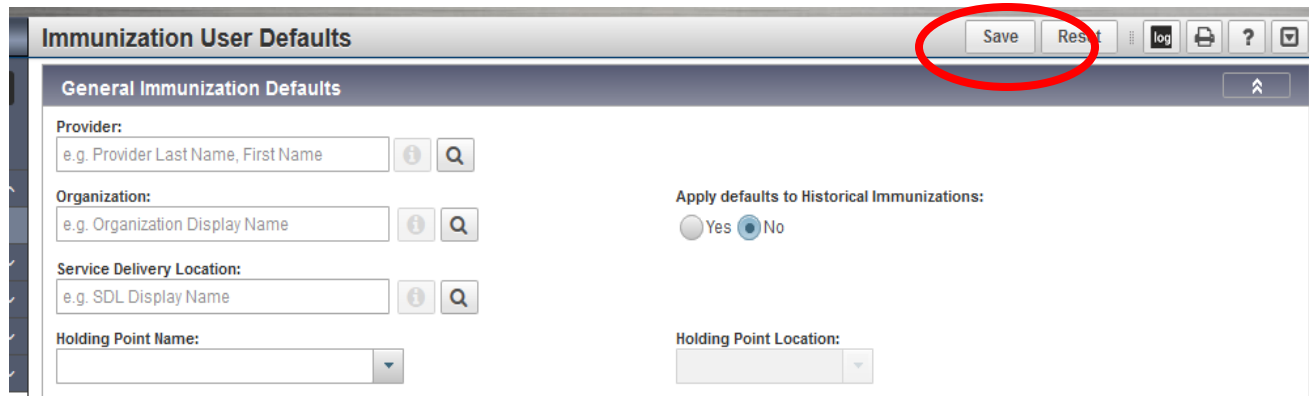
You must select the name from the drop down menu versus just typing the name in full



The screenshot shows a web interface titled "Immunization User Defaults". Under the "General Immunization Defaults" section, there is a "Provider:" label above a search input field containing the text "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 in grey and reads "KURBIS, CAROL A, Medical Doctor, Dr. CAROL A KURBIS, NA". A red arrow points from the right side of the screen towards this highlighted result. Below the first result, another entry is partially visible: "e.g. Organization Display Name".

Setting Up "Provider" Default Setting

Step 15:



The screenshot shows a web application window titled "Immunization User Defaults". The window has a toolbar at the top 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 scroll-up arrow. The form contains several fields: "Provider:" with a text input (placeholder: "e.g. Provider Last Name, First Name"), "Organization:" with a text input (placeholder: "e.g. Organization Display Name"), "Service Delivery Location:" with a text input (placeholder: "e.g. SDL Display Name"), and "Holding Point Name:" with a dropdown menu. To the right of these fields are two sections: "Apply defaults to Historical Immunizations:" with radio buttons for "Yes" and "No" (the "No" button is selected), and "Holding Point Location:" with a dropdown menu.

Click "Save" at the top of the page

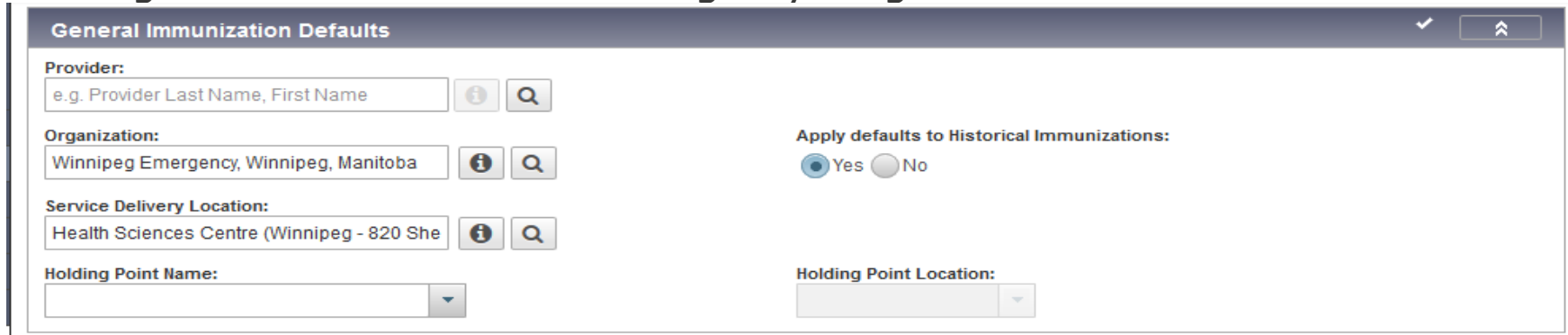
Verify Immunization Defaults

Step 16:

Verify that your user default settings are correct. If they are not correct, complete steps 1 through 16 again.

Example: See the Email sent to you from PHIMS support team via your account requestor. This email has 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 Health Sciences Center entering immunizations for the Emergency Program at HSC.



The screenshot displays a web form titled "General Immunization Defaults". The form includes the following fields and options:

- Provider:** A text input field containing "e.g. Provider Last Name, First Name" with information and search icons.
- Organization:** A text input field containing "Winnipeg Emergency, Winnipeg, Manitoba" with information and search icons.
- Service Delivery Location:** A text input field containing "Health Sciences Centre (Winnipeg - 820 She" with information and search icons.
- Holding Point Name:** A dropdown menu.
- Holding Point Location:** A dropdown menu.
- Apply defaults to Historical Immunizations:** A section with two radio buttons: "Yes" (selected) and "No".

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 on behalf of another organization or entering an immunization that was given elsewhere, it is important to temporarily switch the historical immunization default to “No”. *For example if you want to enter an immunization that was given in India, you would temporarily change the historical immunization default to No. Otherwise the record will indicate that someone from your organization administered the immunization.*
- It is important to remember to always clear/update 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