



Shared health  
**Soins communs**  
Manitoba

# Public Health Information Management System (PHIMS)

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## Module 3: How to Set Up User Defaults

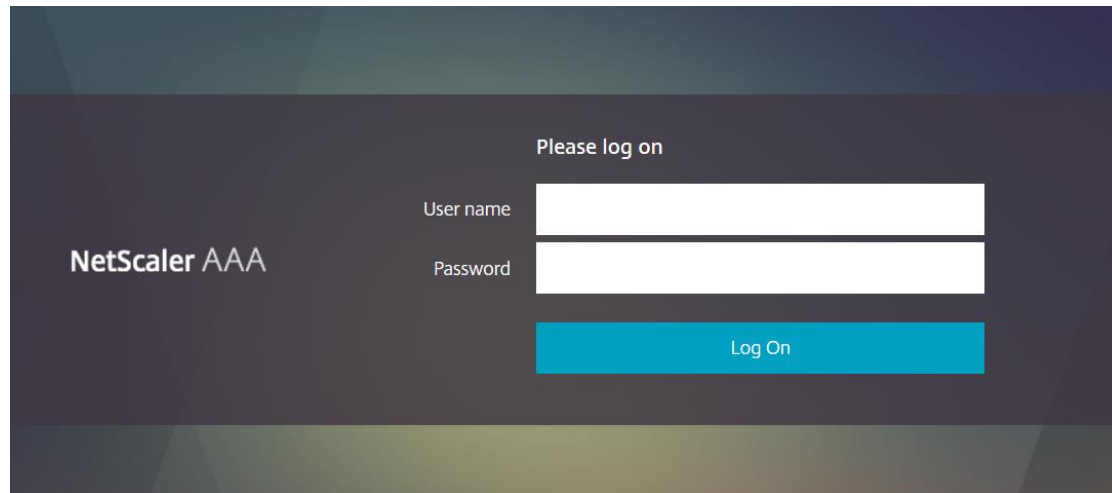
# Setting Up User Defaults

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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

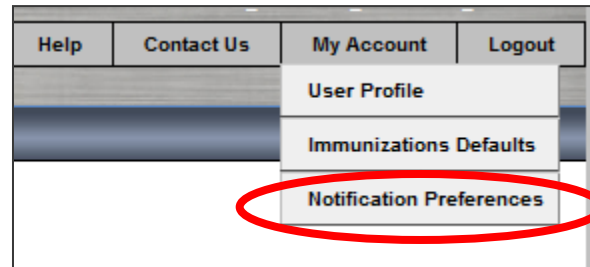
The screenshot shows the Panorama Dev3 user interface. At the top right, there is a navigation bar with the following items: "Generic WRHA20 - ALL PROVIDER", "Threshold Notifications: 0", "Jurisdiction Notifications: 0", "Help", "Contact Us", "My Account" (circled in red), and "Logout". Below the navigation bar, there is a "IMMUNIZATION" tab. The main content area features a header with the text: "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." Below this, there is a form for "Specify your Service Delivery Location (SDL)" with a dropdown menu for "Service Delivery Location" set to "Winnipeg Health SDL" and a "Select" button. Below the form, there are four main sections: "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), and "Notifications" (Create and view jurisdiction and threshold notifications, with links for "View Jurisdiction Notifications" and "View Threshold Notifications"). At the bottom center, there is a "Need Help?" section with a question mark icon and the text "Contact information for the Help Desk". On the right side, there is a calendar for August 2015 and a section for "External Reference Links" with the text "LINKS WILL OPEN A NEW WINDOW" and a message "NoRefLinkMsgKey No Reference Link has been added".

# Setting Up Immunization Defaults

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## 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

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## Step 3:

Click the “Update” button to set/update the correct immunization defaults

**General Immunization Defaults**

**Provider:**

**Historical Immunization:** Yes

**Service Delivery Location:**

**Organization:**

**Holding Point Name:**

**Holding Point Location:**

.....

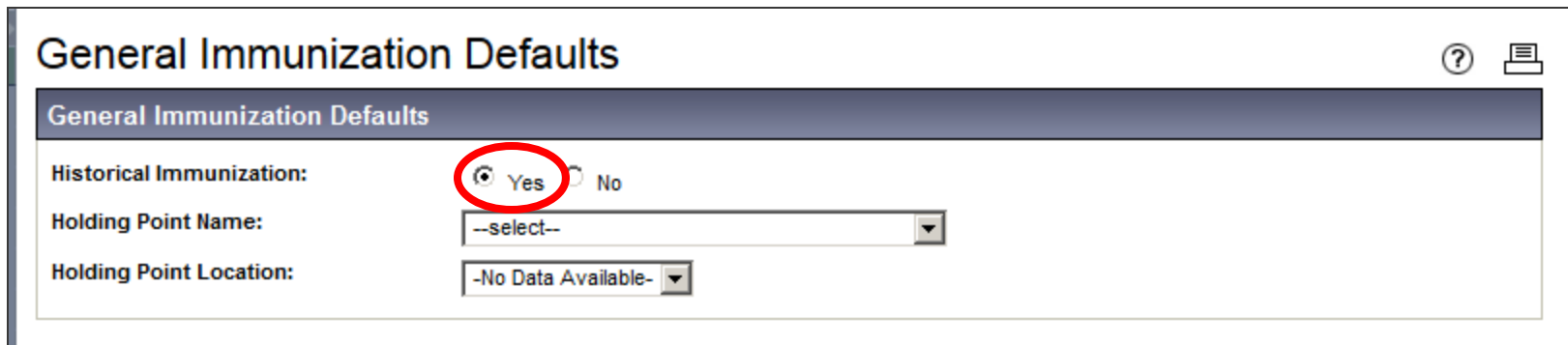
.....

.....

# Setting Up Immunization Defaults

## Step 4:

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.



General Immunization Defaults

General Immunization Defaults

Historical Immunization:  Yes  No

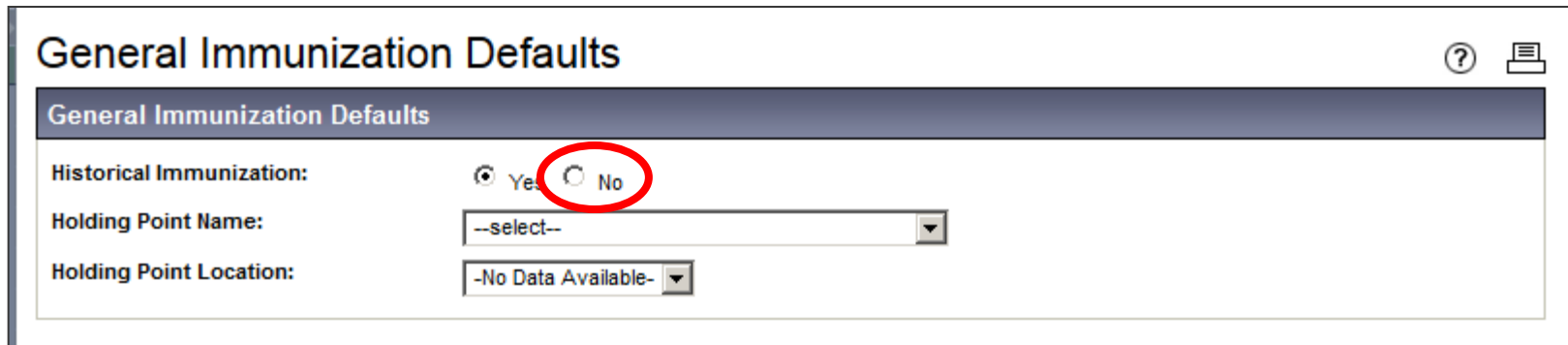
Holding Point Name: --select--

Holding Point Location: -No Data Available-

# 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 form titled "General Immunization Defaults". At the top right of the form area are a question mark icon and a list icon. Below the title bar, there are three fields:

- Historical Immunization:** This field contains two radio buttons. The "Yes" button is selected, and the "No" button is circled in red.
- Holding Point Name:** This is a dropdown menu currently showing "--select--".
- Holding Point Location:** This is a dropdown menu currently showing "-No Data Available-".

**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:

Click the “Find” button beside Organization

### General Immunization Defaults

General Immunization Defaults

Historical Immunization:  Yes  No

Holding Point Name: --select--

Holding Point Location: -No Data Available-

*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.*

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] **Find**

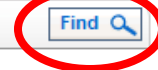
*To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.*

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

*Click Find to select a provider:*

Provider: **Find**

Save Reset Cancel





# Setting Up “Organization” Default Setting

## Step 6:

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**

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

**Organization Name:** winnipeg

**Service Delivery Location:**

To specify a Service Delivery Location, click on 'Select' button. Then click on 'Find' to select a provider:

Service Delivery Location

Winnipeg Beach School , Winnipeg, Manitoba  
CD and Imms Winnipeg, Winnipeg, Manitoba  
Centralized Public Health Winnipeg, Winnipeg, Manitoba  
Winnipeg Child Health, Winnipeg, Manitoba  
Winnipeg Emergency, Winnipeg, Manitoba  
Winnipeg Family Medicine and Primary Care Program, Winnipeg, Manitoba  
Winnipeg Health (including Churchill), Winnipeg, Manitoba  
HSR Winnipeg , Winnipeg, Manitoba  
Winnipeg Home Care Program, Winnipeg, Manitoba  
Winnipeg JRC, Winnipeg, Manitoba

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

**Organization Name:** southern

**Service Delivery Location:**

To specify a Service Delivery Location, click on 'Select' button. Then click on 'Find' to select a provider:

Service Delivery Location

Southern Health, Southport, Manitoba  
Southern LTC, Manitoba  
Medical Clinic Southern, Manitoba  
Southern Mental Health, Manitoba  
Southern Private Occupational, Manitoba  
Southern Public Health, Manitoba

# Setting Up “Organization” Default Setting

## Step 7:

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

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


**Organization Name:** winnipeg

**Service Delivery Location:** Winnipeg Beach School, Winnipeg, Manitoba  
CD and Imms Winnipeg, Winnipeg, Manitoba  
Centralized Public Health Winnipeg, Winnipeg, Manitoba  
Winnipeg Child Health, Winnipeg, Manitoba  
Winnipeg Emergency, Winnipeg, Manitoba  
Winnipeg Family Medicine and Primary Care Program, Winnipeg, Manitoba  
Winnipeg Health (including Churchill), Winnipeg, Manitoba  
HSHR Winnipeg, Winnipeg, Manitoba  
Winnipeg Home Care Program, Winnipeg, Manitoba  
Winnipeg IPC, Winnipeg, Manitoba  
Winnipeg LTC, Winnipeg, Manitoba  
Medical Clinic Winnipeg, Winnipeg, Manitoba  
Winnipeg Medical Clinics WRHA Direct Operations, Winnipeg, Manitoba  
Winnipeg Medical Clinics WRHA Funded Agencies, Winnipeg, Manitoba

**Service Delivery Location**

Click Find to select a provider:

**Provider:**



# Setting Up “Organization” Default Setting

## Step 8:


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

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## Step 9:

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 10:

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 11:

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

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

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

**Type** **Search**

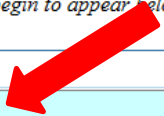
*Start typing the name of the Service Delivery Location. Matches will begin to appear below. Select the match with the keyboard or mouse.*

**SDL Name:**

- HSC (Winnipeg - 820 Sherbrook St), Winnipeg, Manitoba
- HSR PHO, Winnipeg, Manitoba
- HSR - Street Connections Van, Winnipeg, Manitoba
- Health Plus Medical Clinic, Winnipeg, Manitoba
- Healthway Medical, Winnipeg, Manitoba
- Healthway Medical Clinic, Winnipeg, Manitoba
- Health Action Centre Access Downtown, Winnipeg, Manitoba

*Click Find to select a*

**Provider:**



# Setting Up “Service Delivery Location” Default Setting

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## Step 12:

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

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## Step 13:

*\*\*This step is optional. Advance to Step 17 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”



Click Find to select a provider:

Provider:

Clear

Find 

# Setting Up “Provider” Default Setting

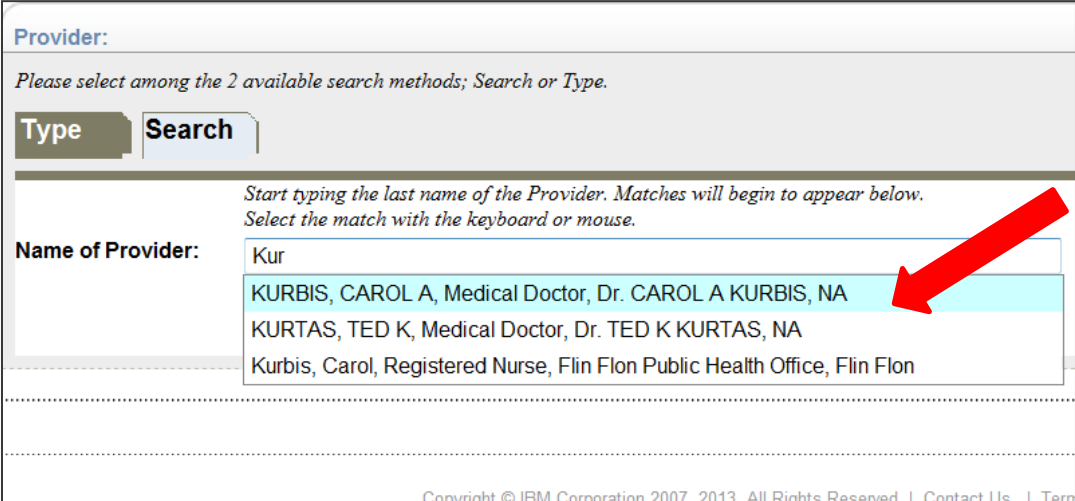
## Step 14:

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

## Step 15:

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



**Provider:**

Please select among the 2 available search methods; Search or Type.

Type Search

Name of Provider: Kur

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

- KURBIS, CAROL A, Medical Doctor, Dr. CAROL A KURBIS, NA
- KURTAS, TED K, Medical Doctor, Dr. TED K KURTAS, NA
- Kurbis, Carol, Registered Nurse, Flin Flon Public Health Office, Flin Flon

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# Setting Up “Provider” Default Setting

## Step 16:

Click “Select”

Click Find to select a provider:

Clear

Provider: Find

Please select among the 2 available search methods; Search or Type. Close X

Type Search

Name of Provider: KURBIS, CAROL A, Medical Doctor, Dr. CAROL A KURBIS, NA

Show Info

Select

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

## Step 17:

Click “Save” at the bottom of the page

Save Reset Cancel

# Verify Immunization Defaults

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## Step 18:

Verify that your user default settings are correct. If they are not correct, complete steps 1 through 18 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.

Personal Settings	
No Default Holding Point has been selected	
QOH cannot be calculated since both HP Name and HPL are blank	
General Immunization Defaults	
<b>Provider:</b>	
<b>Historical Immunization:</b>	Yes
<b>Service Delivery Location:</b>	HSC (Winnipeg - 820 Sherbrook St)
<b>Organization:</b>	Winnipeg Emergency Program
<b>Holding Point Name:</b>	
<b>Holding Point Location:</b>	

# Points to Remember

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- 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

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If you have any questions, contact Digital Health

- Email: [servicedesk@sharedhealthmb.ca](mailto:servicedesk@sharedhealthmb.ca)
- Phone: 204-940-8500 or 1-866-999-9698