Putting Patients First better health · better care · better value · better teams	**Name of Activity:**	**Uploading and Viewing Documents in a Client's Panorama Record**	
	Role Performing Activity:	**Public Health Nurse or appointed staff**	
Work Standard	**Location: Public Health Centre**	**Department: Immunization - Panorama**	
	Document Owner: Ministry of Health	**Region/Organization where this Work Standard originated: MoH**	
	Date Prepared: November 8, 2022	**Last Revision:**	**Date Approved: November 8, 2022**

Summary: This work standard details the steps to upload and view documents in a client's Panorama record.

Task	Procedure
1.	Search for client and put them into context. Create a client record if necessary.

2.	**Steps to upload a document to a Client's Record:**
	
	LHN >Document Management>Context Documents
	• In the Document List section click "**Add New**"
	• The **Document Management** screen is displayed
	• Click on **Choose File** to find the document on your desktop / folders
	• Select the document
	• You are taken back to the **Document Management** screen
	• **Note:** a message appears "Please remember to upload file before submitting changes" (goes away once the Upload File button is clicked)
	    ○ Click on the **Upload File** button
	    ○ Enter a **Document Title** as apppropriate
	    ○ **Effective Date** defaults to today's date, change if required
	    ○ Enter **Expiration Date** if applicable
	    ○ Select **Status** of document from drop list (active, inactive, draft, complete or pending)
	    ○ Enter keyword is disabled ***Leave Blank"**
	    ○ Enter a **Description** if required
	    ○ Click the **Submit** button
	• The **Context Document** page displays, the document details are displayed in the factory table under Document List.

3.	**Steps to View a document that is attached to a Client's Investigation:** **IMMUNIZATION>Document Management>Context Documents** • Scroll to the Document List section • All the documents that have been uploaded for the Client and Investigation in context will be displayed in the factory table in the **Document List** section • To view the document click on the hyperlink under the **Type** column. ○ Another option is to click on hyperlink under the **Document Title** column, then click on the File Name hyperlink. • The Document Management screen is displayed with the details of the document selected • Update details if required • Click Submit or Cancel to return to the previous screen.
Note	Direct scanner hardware is recommended. Initially, many offices will have limited resources for scanning. Some may only have access to machines that will scan to email, which is a problem if local policy prevents the emailing of personal information.

Task	Procedure
	Local policy may need to be re-evaluated if this is a barrier to documentation, until direct scanner hardware becomes available to investigators.