Upload/View Documents attached to an Investigation	**Name of Activity:** Document Management **Role performing Activity:** CDC Nurse, PHI or Admin. Staff		
Panorama – IOM WORK STANDARD	**Location:**		**Department:**
	Document Owner:		
	Date Prepared: **May 24, 2018**	**Last Revision:** **Feb 2022**	**Date Approved:**

Assumptions: A Client and Investigation are in context

Note: **When a document is uploaded with a Client and Investigation in context that document can only be viewed when the Client and Investigation are in context.**

If other document have been uploaded with only the client in context they will not be visible if an investigation is in context as well.

Note: Ensure there is not an 'encounter' in context. (Should only have the client bar and investigation bar at top of page. If an encounter bar exists, remove by going to recent work and clicking on the investigation.

Essential Tasks:	
1.	**Steps to upload a document to a Client's Investigation:** **LHN >Document Management>Context Documents** ➢ In the Document List section click "**Add New**" ➢ The **Document Management** screen is displayed ➢ Click on **Choose File** or **Browse** (button name depends on which browser you are using) to find the document on your desktop / folders ➢ Select the document ➢ You are taken back to the Document Management screen ➢ **Note:** a message appears X Upload file before submitting changes (goes away once the Upload File button is clicked) ➢ Click on the **Upload File** button ➢ Enter a **Document Title** • **Lab report** • **Contacts** • **Letter Non-standard** • **MHO notes** • **Public Health Order** • **Physician/Specialist report** ➢ **Effective Date** defaults to today's date, change if required ➢ Enter **Expiration Date** if available ➢ Enter **Status** of document from drop list ➢ 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.

2	Steps to View a document that is attached to a Client’s Investigation: **INVESTIGATION>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 details click on the hyperlink in the document title field (or to go straight to the document click on hyperlink under type column). ➢ 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. Local policy may need to be re-evaluated if this is a barrier to documentation, until direct scanner hardware becomes available to investigators.