**PERTH AND SMITHS FALLS DISTRICT HOSPITAL**

**POLICY AND PROCEDURE**

 **TITLE: Importing a Single Document to Medworxx PDMS**

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 **AUTHOR: Kimberly Kehoe**

**Purpose:**

Documents are added to the Policy Document Management System individually. This procedure describes the process and necessary steps to import a document to the Medworxx Policy and Document Management System.

**Procedure:**

 **Medworxx PDMS is only compatible with Chrome for document management.**

1. Navigate to the **Content Menu** and select **Content List**.
2. Click on **Add** and choose the appropriate content type (Policy and Procedure, Form etc.) and click on the Add button. The appropriate content template will open. The content template is composed of multiple tabs that hold different information about the document. It is best to start at the first tab and click on the NEXT button to move through the tabs.
3. **File Tab** – this tab is used to upload the document. Click on **Browse** to locate your document, select it and click on open.
4. Once a green icon displays beside the filename, click on the **Upload** button to copy the file into the Medworxx database. The file name, type and size will then be listed underneath. Clicking on the *open* button to view the file in its original format. The *preview* button will display the file as it will appear to the end user.
5. Click on the **Details Tab**. Fields marked with an asterisk (\*) are mandatory.

**Name** – this is a mandatory field that holds the name or title of the document. It is best to be as concise as possible.

**Category** – the category tree is a hierarchy. Click on the select icon. The *Select Category* window will be displayed. To expand the tree sections, click on the + button. The category tree is a virtual filing cabinet. If you feel additional “drawers” are required, contact one of the administrators.

**Description** – this is an optional field that if populated will display to the end user during a Search. If using this field, enter a summary, scope or purpose of the document.

**Document Number –** a unique identifier can be added to the document to ensure traceability; this is an optional field for all areas except the Clinical Laboratory where it is a mandatory accreditation requirement.

**Distribution Groups** – this field allows authors to identify the group of individuals for whom the document applies.

**Signing Authority** – this is a mandatory field that allows authors to select the title of the approver of the document. More than one title may be selected as applicable to the department’s requirements.

**Type** - **this** is a mandatory field and identifies the document subtype (i.e. form, medical directive, policy, patient information sheet etc.)

**Related Documents** – this field allows the author to provide clickable links to content that is already stored in the *Medworxx PDMS system*. These documents may be considered appendices or attachments to the policy. Note that in order to use this feature, the document must already be uploaded in the system.

**External Links** – this is used to provide clickable links to such things as external websites or documents as a supporting reference for the document.

1. Click on the NEXT icon located at the top or bottom of the page or click on the **Security Tab**. Ensure that the VIEW SECURITY field is set to public (staff are not required to sign in). If the security is set to private the end user will not be able to view or access the document.
2. Click on the NEXT icon located at the top or bottom of the page or click on the **Workflow Tab**. Select the appropriate workflow.

Default Workflow - This workflow includes edit, review, approve and publish and should be used for all newly created documents or revised documents.

PSFDH Simple Workflow – includes edit and publishing steps. This workflow is used for initial import of documents from Meditech and for documents that have been reviewed and do not require any revisions.

1. Under the workflow tab, responsible individuals are tasked for completing specific workflow steps on the imported document.
* **Edit** – add the user(s) who are responsible and require access for uploading and updating the policy.
* **Review** – add the user(s) who are the subject matter experts that will be responsible for reviewing and providing feedback on the document.
* **Approve** – add the user(s) who have signing authority for the policy; this person should be indicated as having signing authority in step 5 above.
* **Publish** – the workflow process is set to auto-publish upon approval
1. Within the published section of the workflow, there is a section for review dates**.** The *next review date* is calculated based on the last review date and review period. All of these fields can be edited.

**References:**

Medworxx Content Managers Policy Training Guide 2016