

# Upload an ACP Document

## Requirements

Patients must have the following recorded in their demographic details:

- Family name
- Date of birth
- Individual Health Identifier

The user logged in to Bp Premier must have one of the following entered in their User Profile:

- Phone number
- Fax number
- Practice E-mail



Advance Care Planning documents can only be uploaded as a **PDF**.



To upload Advance Care Planning documents, User must have My Health Record Access permission set to Allow Access.

## Upload a new ACP

1. From the patient's clinical record, select **My Health Record > Upload Advance Care Planning**.
2. Click the **Import PDF** button.
3. Find the document and click **Open**.
4. Complete the Import details and the Document Author details sections.
5. Click **Preview > Check the document > Upload**.

Once uploaded, a copy of ACP is saved to **Correspondence In** and the action is recorded in the patient's **Today's notes**.

The screenshot shows the 'Advance Care Planning' window. At the top, there is a table titled 'Correspondence documents:' with columns for Date, From, Category, Subject, Date checked, and Checked by. Below the table, there is a section for 'Import new Advance Care Planning document' with an 'Import PDF' button. The 'Import details' section includes fields for Date (9/02/2023), Category (Advance Care Planning), From, Subject (Advance Care Planning), and a 'Details' area. The 'Document Author details' section includes fields for Title, First name, Surname, and checkboxes for 'Include contact details' and 'Confidential'. There is also a 'User reference' field and 'Preview' and 'Cancel' buttons at the bottom right.

## Upload from Correspondence in

This screenshot is similar to the previous one but shows a document selected in the 'Correspondence documents' table. The 'Date' column has a blue square with the number '4' next to it, indicating the selected document. The rest of the interface, including the 'Import details' and 'Document Author details' sections, is the same as in the previous screenshot.

1. In **Correspondence In**, locate a copy of the patient's ACP.
2. Right-click on the document and select **Edit details > update its category to Advance Care Planning > Save**.
3. From the patient's clinical record, select **My Health Record > Upload Advance Care Planning**.
4. Select the document.
5. Complete the Import details and the Document Author details sections.
6. Click **Preview > Check the document > Upload**.

View ACP in MyHR:

1. From the patient's clinical record, select **My Health Record > Document List**
2. Set the filter **Document Type** to Advance Care Planning Document.
3. Click **Update**.

Delete ACP from MyHR:

1. From the patient's clinical record, select **My Health Record > Uploaded documents**.
2. Select the document > **Remove**.