

# Additional documentation/file uploads

PDF files can be uploaded to a **Contact** or a **Referral** record in the **Additional documentation** section (just before the **Notes** section).

Files uploaded to a Contact record will automatically transfer over to the Referral record if it is converted to a Client.

Before uploading a file, a file type must be selected. Only one file per type can be uploaded.

## How to upload

1. Click the **New PDF file** button. *Note that this button **will not be visible** if a file has already been uploaded for each available file type.*
2. Select the file type.
3. Locate the file.
4. Once the file type and file are entered, the **Upload** button will appear. Click this button to upload the file and complete the process.

Once the file is uploaded, you will see the **View** button, and an actions button (⋮) for accessing the **Delete** and **Download** functions.

### Note:

- you do not have to click the main **Save** button. The upload process is independent of the screen's save process.
- the document must be in a PDF format and less than 3 MB. If you have PDF files that are larger, your IT Support team may be able to provide you with a tool to reduce PDF sizes.

## File types

The available file types are:

- Assessment documents
- Clinical documentation

- Discharge Summary
- Mental Health Treatment Plan (GP)
- Referral in **(this is the default type)**
- Referral confirmation
- Waitlist letters

Intake teams can choose from the list above which file options are available to their team, please contact [pmhcis.support@nwmphn.org.au](mailto:pmhcis.support@nwmphn.org.au) with any requests.

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