Investigations:
Create a Cohort with the Upload Tool

Step 1: Prepare a Client List for PHIMS Upload – refer to '**Preparing a List for Client Upload'** guide

Step 2: Create Cohort

LHN > Investigations > **Search Cohort**

The Search Cohort page displays

- Click **Search**
- Click **Create Cohort**

The Create Cohort page displays

1. Enter a Cohort Name (i.e. Mumps, School grade 4)
2. Cohort Type select Static
3. Effective from date should default to current date (do not select an Effective to date)
4. Select the correct encounter group for the cohort (i.e. Communicable Disease – Mumps)
5. Jurisdictional Organization should default to your logged in organization
6. Click Save

The Update Cohort page displays (Note the Cohort ID number)

Click **Upload Client Data File**

Step 3: Uploading Client List

The **Upload Client** page displays

Important Note: Ensure the Mandatory Fields: **Health Card Number, Date of Birth and Gender** are **checked off**. Also, DO NOT update the Health Region Information and SDL Id on the client upload page (Default Values section).

- Scroll to the **Upload File** section

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- Click **Choose File**

- Retrieve Cohort Client List (the **Text – Tab delimited**) file.
- Ensure the radio button is on '**Cohort New Result Set Name'**
- Click **Upload**

The 'Upload Results' displays

Note: If Rejected clients, refer to the '***Managing Added and Rejected Clients from an Upload'*** guide

If no rejected clients display in the Upload Results section

- Click **Return to Maintain Cohort**