



Investigations:

Create Cohort **Without** the Upload Tool

PRE-WORK

- 1) Identify Case in PHIMS: Client ID, Case Investigation ID, TE ID
- 2) Identify list of contacts, write down PHIMS PHIN # or Client ID's or last name & birth date

For this Scenario we will use the following:

Case or Contact	First Name	Last Name	PHIMS Client ID
Case	Amy	Addario	5950
Contact	Alyssa	Agosti	5951
Contact	Norma	Nash	5952
Contact	Nola	Novak	5953
Contact	Ryder	Varley	5954
Contact	Pino	Reeve	5955
Contact	Donald	Underwood	5956

Workflow – starting from the **Search Clients** page:

- 1) Search for the first contact on your list: **Alyssa**
- 2) Select the radio button to the left of **Alyssa's** name in the *Search Results* panel
- 3) Click the **Create Cohort** button

The screenshot shows the 'Search Results' panel with several tabs: Preview, Update, Set In Context, Create Cohort (highlighted), and Subject Summary. Below the tabs is a table of search results. The first row is highlighted, and its radio button is circled in red. The table columns include Client ID, Health Card Number, Last Name, First Name, Middle Name, Gender, Date of Birth, Health Region, and Active status.

Client ID	Health Card Number	Last Name	First Name	Middle Name	Gender	Date of Birth	Health Region	Active
5951	252525252	Agosti	Alyssa		Female	2001 Feb 14	Prairie Mountain Health	Active

The Create Cohort page displays

- 1) Enter a cohort name (i.e. GC Cohort House Party)
- 2) Enter a client list name (i.e. GC House Party Contacts)
- 3) Effective from date should default to current date
- 4) Select the correct encounter group for your cohort (*Sexually Transmitted and Bloodborne Infections*)
- 5) Jurisdictional Organization should default to your logged-in organization
- 6) Click **Save**



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Update Cohort Cancel Save Reset Log Print Help Close

Cohort ID: 278 Info Cohort Name: GC Cohort House Party Contacts Encounter Group(s): Sexually Transmitted and Bloodborne Infections Client List Name/ ID: -

Cohort Details Checkmark Up Arrow

* Cohort Name: GC Cohort House Party Contacts * Cohort Type: Static

Status: Inactive Created By: Cohort Source: Search Clients

* Effective From: 2022/04/05 To: 2022/04/06

Available Encounter Groups: Communicable Diseases, Immunization, Outbreak Response, Tuberculosis

* Selected Encounter Groups: Sexually Transmitted and Bloodborne Infections

Description: (200 characters remaining.)

* Jurisdictional Organization: Starts With Prairie Mountain Health, Manitoba Info Search

Client Lists Checkmark Up Arrow

Update Client List View Client List Select and Return Upload Client Data File Upload Client ID List

Client List ID	Client List Name	Number of Clients	Created On	Created By
256	GC House Party Contacts	1	2022 Apr 14	

Total: 1 1 10

7) Scroll to Client Lists section

8) Select the radio button beside the 'Client List ID' and click **Update Client List**

Client Lists Checkmark Up Arrow

Update Client List View Client List Upload Client Data File Upload Client ID List

Client List ID	Client List Name	Number of Clients	Created On	Created By
<input checked="" type="radio"/> 256	GC House Party Contacts	1	2022 Apr 14	Desrosiers, Robert

Total: 1 1 10



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Alyssa is the first contact in the cohort as added from the previous steps, you will now add the rest of the contacts into the cohort

9) Enter client id number or PHIN in the 'Client' type-ahead field (when you start entering client's id number you will see the client's information display, click on the greyed-out client name bar to select, click [**Add**]). (If you enter the PHIN number, you will need to select 'Health Card Number' from the Search Type dropdown list)

10) Repeat for the other contacts.

Client List Details

Client List Details
Cohort ID: 278 Cohort Name: GC Cohort House Party Contacts
Client List Name: GC House Party Contacts Created By: Created On: 2022 Apr 14

Actions on all records listed:
View Map Create Investigation Export Client List

Client:
Norma, Nash | ID 5952 | 656565655 | Male | 2004 Nov 25
Novak, Nola | ID 5953 | 757575757 | Female | 2002 Sep 25
Varley, Ryder | ID 5954 | 546546546 | Male | 2001 May 24
Reeve, Pino | ID 5955 | 951357426 | Male | 2000 Oct 17
Underwood, Donald | ID 5956 | 369852147 | Male | 2001 Dec 25
Client Last Name or ID

Search Type: Add

Preview Client View Imms Profile Clinical Notes Remove Update

	Client ID	Client Name	Date of Birth	Gender
<input type="checkbox"/>	5951	Agosti, Alyssa	2001 Feb 14	Female

Total: 1

11) Click **Save**

* Make a note of the Cohort ID (278)



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Update Client List Members

Save Delete Update Cohort Reset log Print ? Refresh

Cohort ID: 278 **Cohort Name:** GC Cohort House Party Contacts **Encounter Group(s):** Sexually Transmitted and Bloodborne Infections **Client List Name/ ID:** GC House Party Contacts / 256

Status: Inactive **Cohort Source:** Search Clients

Client List Details

Client List Details

Cohort ID: 278 **Cohort Name:** GC Cohort House Party Contacts **Client List Name:** GC House Party Contacts **Created By:** **Created On:** 2022 Apr 14

Actions on all records listed:

View Map Create Investigation Export Client List

Client: Client Last Name or ID **Search Type:** Add

Preview Client View Imms Profile Clinical Notes Remove Update

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Client ID	Client Name	Date of Birth	Gender	City of Residence	Phone Number
<input type="checkbox"/>			5951	Agosti, Alyssa	2001 Feb 14	Female		
<input type="checkbox"/>			5612	Ireland, Harper	1995 Feb 18	Female		
<input type="checkbox"/>			5952	Norma, Nash	2004 Nov 25	Male		
<input type="checkbox"/>			5953	Novak, Nola	2002 Sep 25	Female		
<input type="checkbox"/>			5955	Reeve, Pino	2000 Oct 17	Male		
<input type="checkbox"/>			5956	Underwood, Donald	2001 Dec 25	Male		
<input type="checkbox"/>			5954	Varley, Ryder	2001 May 24	Male		

Total: 7

1

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