Create Cohort COVID-19 Immunization Record Upload Template Guide

MB6800B-COVID-19 Immunization Status by Client Cohort

These columns must have data entered before the upload process (highlighted in yellow)

Column B – Health Card Number (9 digits, no space between)

Column C – HCN Province (MB)

Column H – Last Name (if hyphenated name, enter a space between the names, no (-))

Column I – First Name

Column X – Gender (M, F, UN)

Column Z – DOB – yyyy-mm-dd (text format)

Column BB – Telephone1 Type 'Usage' (HP = home phone) or (MC = mobile), if more than one phone, you can enter it manually after the upload

Column BC – Telephone1 Area Code (204, 431 or 437) a three-digit number

Column BD – Telephone1 Number (5552224, no space between)

	B	C	H	I	X	Z	BB	BC	BD
1	Health Card Number	HCN Province	Last Name	First Name	Gender	DOB (yyyy-mm-dd)	Telephone1 Type	Telephone1 Area Code	Telephone1 Number
2	505273815	MB	Towncoal	Derrick	M	2001-05-11	HP	204	5555276
3									
4									
5									

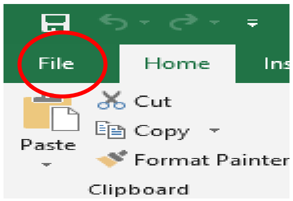
The Client Upload Template for COVID19 Cohort can be found on the PHIMS website. COVID-19 Immunization tile

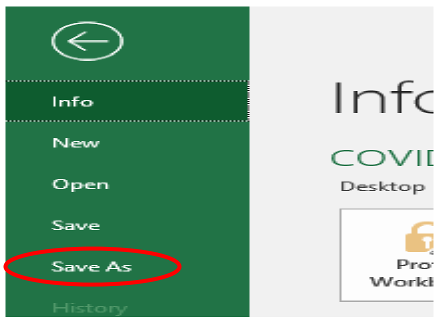
Before saving the final version of the client upload template ensure that the columns are unhidden and that the format is correct

Please download a fresh template for every new cohort created.

Save excel file as Text (tab delimited)

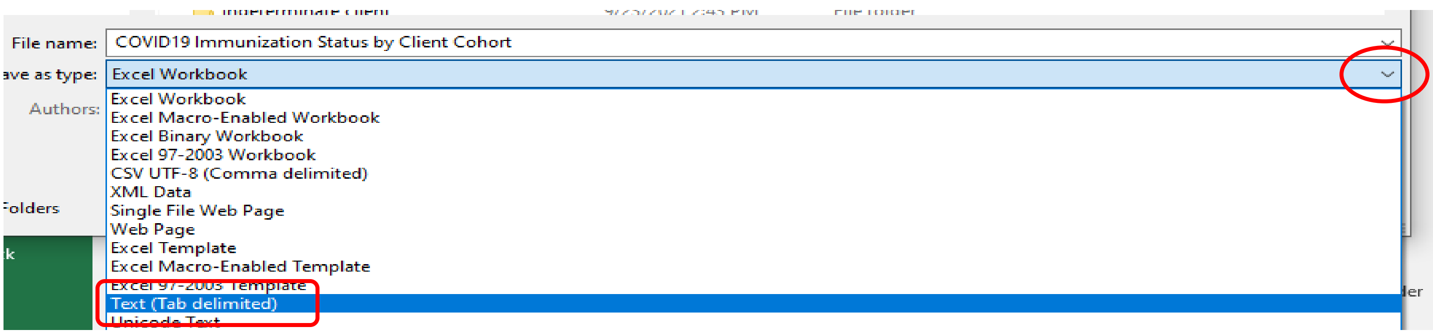
Click **File**, Click **Save As**



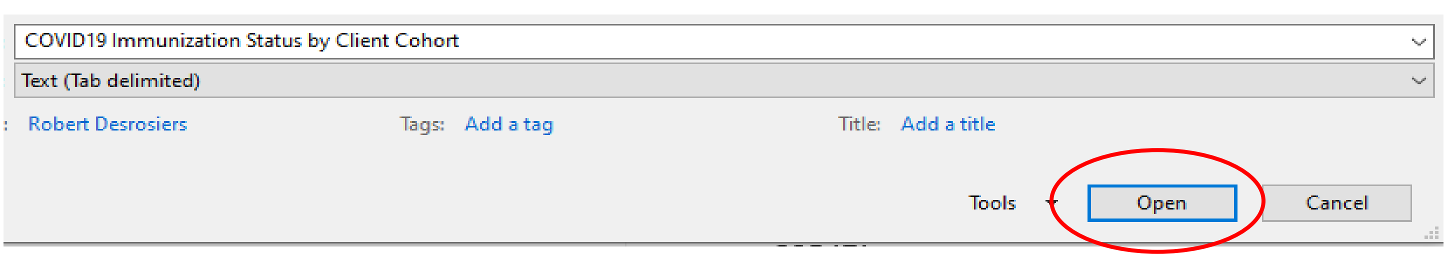


Click on the folder where you would like to 'save' the file

Click on the dropdown arrow and select Text (Tab delimited)



Click **Open**



Click **Save**

Some computer screen may vary

Upload a file
LHN > Investigations > Cohort > **Search Cohorts**
The ***Search Cohort*** page displays

- Click **Search** (you must search before you can create a cohort)

Under the ***Search Results*** panel
- Click **Create Cohort**

The **Create Cohort** page displays
- Create a **Cohort Name**
- **Cohort Type**: select **Static** from the drop-down list
- The **Effective From** date is defaulted to the current date
- Select **Encounter Group(s)**
- Select **Jurisdictional Organization**
- Click **Save**

'Cohort was successfully saved' message displays

Take note of the **Cohort ID** number (top left corner)

Scroll to **Client Lists** section
- Click **Upload Client Data File**

The **Upload Client** page displays
Select the checkbox beside:
- Health Card Number
- Date of Birth
- Gender

Scroll to the **Health Region Information**
Click FIND – Organization Name

- Start typing in the name of the Responsible Organization Unit(s) from one of the seven Regional Health Authorities.
    - First Nation and Inuit Health, Manitoba
    - Interlake Eastern Health, Manitoba
    - Manitoba, Winnipeg, Manitoba
    - Northern Health, Manitoba
    - Prairie Mountain Health, Manitoba
    - Southern Health – Santé Sud., Southport, Manitoba
    - Winnipeg Health, Winnipeg, Manitoba
- Click **Select**

Scroll to the **Upload File** section

- Click **Choose File**

The PC window displays, find the (Text. Tab delimited file)

- Click **Open**, the file name displays beside the *Choose File* button
- Select the radio button beside the **Cohort New Results Set Name**: Enter a name for the Cohort Results
- Click **Upload**

Scroll to the **Upload Results** section, you will notice your file has been uploaded successfully by the number of **Total Processed** displays the number of clients you entered.

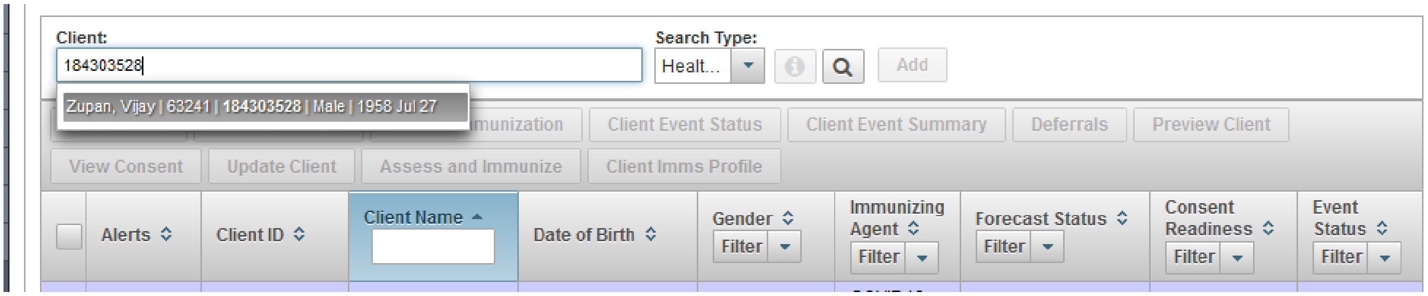
- Click **Return to Maintain Cohort** (at the top of the page)

Rejected file

**If you get the message *'Errors found in xx record(s). Download reject file to correct and re-upload.'* this indicates there are client rows that contain incorrect information – i.e. incorrect PHIN number, birth date, name, etc. If the client information in the text file is not an exact match to the client record in PHIMS, the row will be rejected.

Scroll to the **Event Worksheet,** in the ***Client:*** box, click the dropdown arrow under 'Search Type' and select 'Health Card Number'. Enter the rejected clients PHIN number and select. If the PHIN number does not generate a client to select, change the search type to 'Name' and start typing the client's last name followed by a comma (,) then first name, and select the client.

Click **Add**



To *Add* or *Remove* a client from the client cohort list

- **Add** a client

Select *Health Card Number* from the ***Search Type*** dropdown list, if searching by Health Card Number (PHIN). You can also search for the client by entering the client id or the client name. Start entering the health card number, client id number or the client name. When the client's name displays client on the highlighted client's name and click **Add**.

- **Remove** a client

Select the checkbox associated to the row for the client, click **Remove**, click **Save**

To link the cohort to a Transmission Event, use "**Create a Cohort and Add Multiple Contacts to a TE"** page 4