

Create Clients and Immunization Histories for Training

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What is the Training Client Data Load?

Trainers will create a set of clients with immunizations histories for each trainee in each training session. The data is created using an excel spreadsheet containing macros. New clients with fresh histories need to be created for each training session because once a data set has been used; the client's immunization history will be updated (they will have newly recorded immunizations) and will not be forecast for the agents that we have in the scenarios.

The Training Client Data Load will create a set of 50 clients with appropriate immunization history for each trainee. The Training Client Data Load can create data sets for a maximum of 24 trainees at a time. The data set includes client upload files, immunization upload files and a PDF file containing the client names, PHINs, Gender and DOB for each trainee.

What are the characteristics in the Training Client Data Load?

#clients per trainee - 50

Data set Names - Each data set is created using one letter of the alphabet minus Q and X


Naming Convention - Each set of names is unique for each class by the addition of the region and the date created. For the client: Altona-S20220605

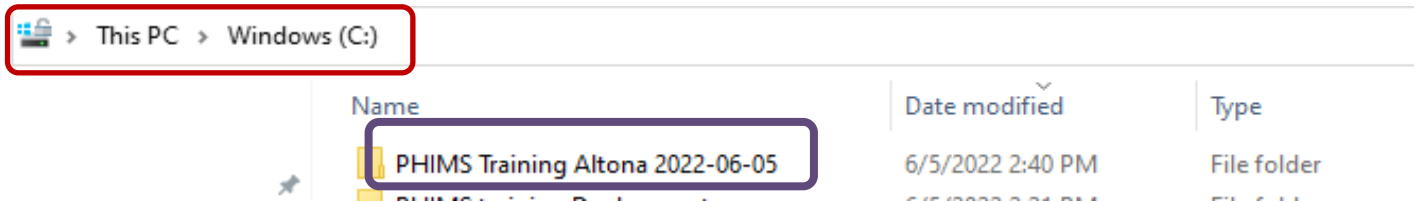
Altona-	S-	2022-06-05
Part of the "A" name set	Refers to the region, in this case SH-SS	Date selected in the spreadsheet: June 5, 2022

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Step by Step Process

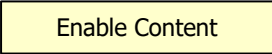
Preparing

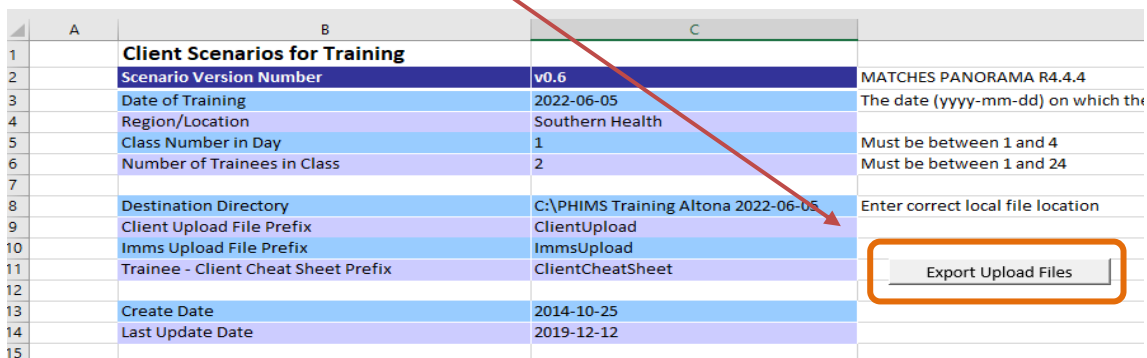
1. Shutdown all network applications: email, internet, other clinical apps
2. Create a Folder on the C:/ drive  to store the data. Develop a naming convention that includes the date of creation in the folder name. e.g. PHIMS Training Altona-2022-06-05.



3. Copy the 'Immunization Training Client Data Load' excel template to your folder. The excel template can be found on the PHIMS Website in the Trainers folder.

Create Data

1. Open the Training Client Data Load – excel template
 - a. Click 
 - b. Date of Training: today's date (enter format yyyy/mm/dd)
 - c. Region/Location: Select from the drop list
 - d. Class number in day: usually 1
 - e. Number of Trainees: Data sets you want (# of trainees + 2 for trainer and practice)
 - f. Destination Directory: Name of folder created in the C:/ drive (e.g. C:/PHIMS Training Altona 2022-06-05).
 - g. Click **Export Upload Files**

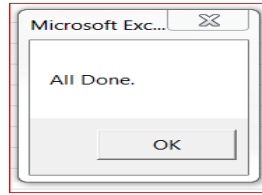


The screenshot shows an Excel spreadsheet titled 'Client Scenarios for Training'. The data is as follows:

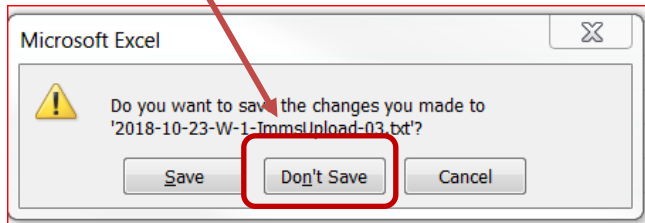
	A	B	C
1		Client Scenarios for Training	
2		Scenario Version Number	v0.6
3		Date of Training	2022-06-05
4		Region/Location	Southern Health
5		Class Number in Day	1
6		Number of Trainees in Class	2
7			
8		Destination Directory	C:\PHIMS Training Altona 2022-06-05
9		Client Upload File Prefix	ClientUpload
10		Imms Upload File Prefix	ImmsUpload
11		Trainee - Client Cheat Sheet Prefix	ClientCheatSheet
12			
13		Create Date	2014-10-25
14		Last Update Date	2019-12-12
15			

An orange box highlights the 'Export Upload Files' button in the bottom right corner of the spreadsheet. A red arrow points from the text 'Click Export Upload Files' in the previous list item to this button.

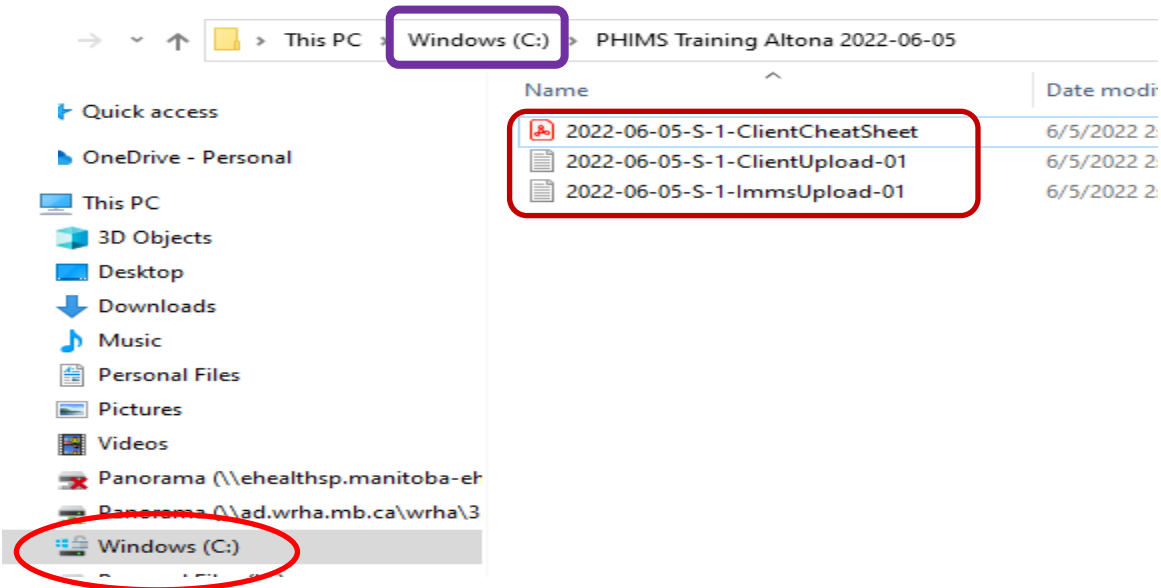
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- h. Click **Ok**
- i. Close File
- j. Click **Don't Save**



- 4. Open Folder to view created files. There will be one client and one immunization file for every two data sets created.



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Load Data into PHIMS

1. Open PHIMS > you **MUST** log in as "MB_CDI_Public_Health_Coordinator" or **MB_Public_Health_Clerk**
2. Click **Immunization**
 - a. LHN > Clients > **Upload Clients**
 - b. Scroll to the **Upload File** section
 - c. Click **Choose File**

Upload File

Upload file created from a Client Data template (tab c

* **File name:** No file chosen

3. Navigate to the C:/ drive folder
 - a. Select the **Client Upload-01.txt** file

s (C:) > PHIMS Training Altona 2022-06-05

Name	Date modified
2022-06-05-S-1-ClientCheatSheet	6/5/2022 2:21 PM
2022-06-05-S-1-ClientUpload-01	6/5/2022 2:21 PM
2022-06-05-S-1-ImmsUpload-01	6/5/2022 2:21 PM

- b. Double click on the file – the file name will display beside the 'Choose File' button

Upload File

[Hide Up](#)

Upload file created from a Client Data template (tab delimited *.txt)

* **File name:** 2022-06-04...pload-01.txt

Potential Matches with a score ≥ 75 : Allow Reject

- c. Click **Upload**
- d. Review success for client upload

Upload Results

2022-06-04-S-1-ClientUpload-01.txt

Clients Added 0

Clients Updated 93

Uploaded 93

Rejected 0

Total Processed 93

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e. Continue Uploading all Client Files (if applicable)

4. LHN > Upload Data

- a. Upload Immunization Records file.
- b. Click **Choose File**

Upload Immunization Records

* Required field




Note: You must upload the client data first already uploaded the client data; otherwise

* **File name:**

5. Navigate to the C:/ drive folder

- a. Select the **Imms Upload-01.txt** file

vs (C:) > PHIMS Training Altona 2022-06-05

Name	Date modified
 2022-06-05-S-1-ClientCheatSheet	6/5/2022 2:21 PM
 2022-06-05-S-1-ClientUpload-01	6/5/2022 2:21 PM
 2022-06-05-S-1-ImmsUpload-01	6/5/2022 2:21 PM

- b. Double click on the file – the file name will display beside the 'Choose File' button

Upload File

Upload file created from a Client Data template (tab delimited *.txt)

* **File name:** 2022-06-04...pload-01.txt

Potential Matches with a score ≥ 75 : Allow Reject

c. Click **Upload**

- d. Review success for client upload

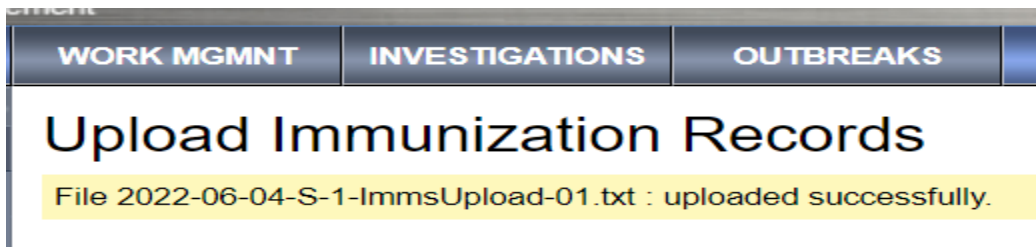
Upload Results

2022-06-04-S-1-ImmsUpload-01

Imms Records Added	818	No errors found.
Imms Records Rejected	0	
Total Processed	818	

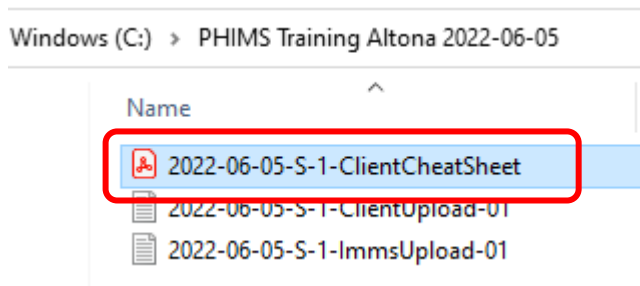
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- e. Continue Uploading all Immunization files (if applicable)

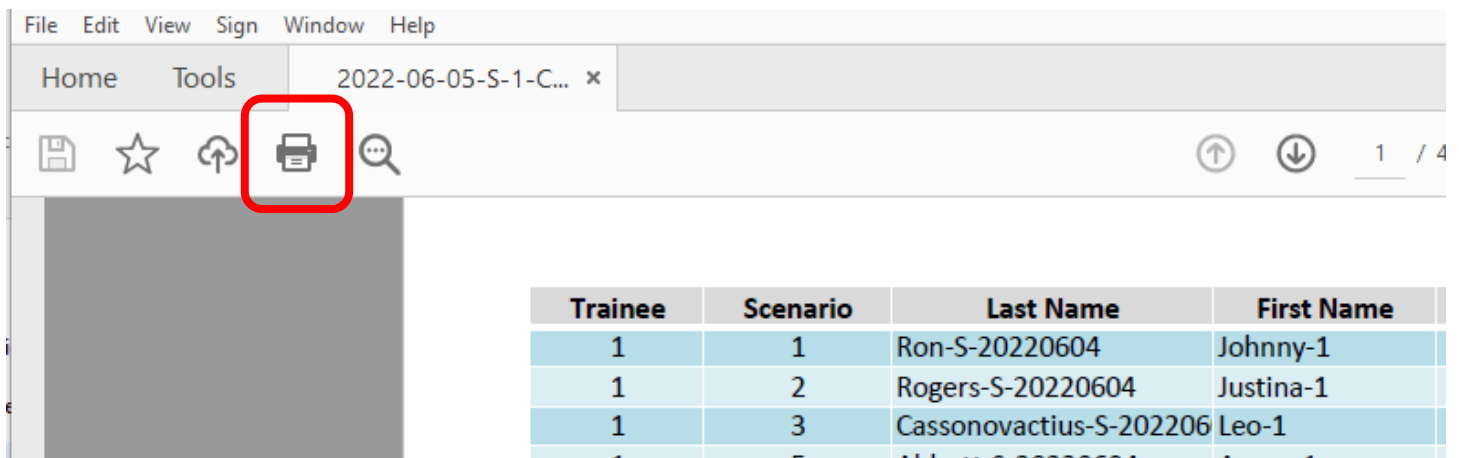


Printing the Trainee Data Sheets

- 6. Double click on the file



- b. Print Client Cheat Sheet



Create Clients and Immunization Histories for Training

Trouble Shooting

Q I'm trying to load data for my class next week and it won't load.

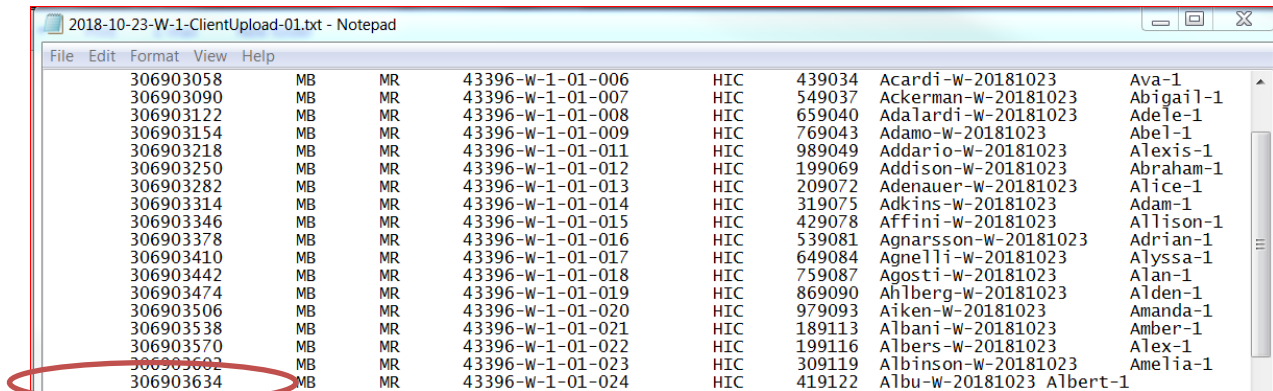
A If you selected a date in the excel spread sheet that is in the future, the data created is future dated and PHIMS won't load it. Create data with today's date or in the recent past for accurate loads.

Q When I look up my client by PHIN, I find another client with the same PHIN.

A The PHINs are randomly generated. It is possible that over the course of creating training data for many clients, we will get a duplicate PHIN.

Q PHIMS times out and doesn't look like it uploaded the immunization history files.

A Identify the number of the immunization file you were loading (e.g. YYYY-MM-DD-R-1 ImmsUpload-01) and open the corresponding client file e.g. YY-MM-DD-R-1 ClientUpload01)



File	Edit	Format	View	Help					
306903058	MB	MR	43396-W-1-01-006	HIC	439034	Acardi-W-20181023	Ava-1		
306903090	MB	MR	43396-W-1-01-007	HIC	549037	Ackerman-W-20181023	Abigail-1		
306903122	MB	MR	43396-W-1-01-008	HIC	659040	Adalardi-W-20181023	Adele-1		
306903154	MB	MR	43396-W-1-01-009	HIC	769043	Adamo-W-20181023	Abel-1		
306903218	MB	MR	43396-W-1-01-011	HIC	989049	Addario-W-20181023	Alexis-1		
306903250	MB	MR	43396-W-1-01-012	HIC	199069	Addison-W-20181023	Abraham-1		
306903282	MB	MR	43396-W-1-01-013	HIC	209072	Adenauer-W-20181023	Alice-1		
306903314	MB	MR	43396-W-1-01-014	HIC	319075	Adkins-W-20181023	Adam-1		
306903346	MB	MR	43396-W-1-01-015	HIC	429078	Affini-W-20181023	Allison-1		
306903378	MB	MR	43396-W-1-01-016	HIC	539081	Agnarsson-W-20181023	Adrian-1		
306903410	MB	MR	43396-W-1-01-017	HIC	649084	Agnelli-W-20181023	Alyssa-1		
306903442	MB	MR	43396-W-1-01-018	HIC	759087	Agosti-W-20181023	Alan-1		
306903474	MB	MR	43396-W-1-01-019	HIC	869090	Ahlberg-W-20181023	Alden-1		
306903506	MB	MR	43396-W-1-01-020	HIC	979093	Aiken-W-20181023	Amanda-1		
306903538	MB	MR	43396-W-1-01-021	HIC	189113	Albani-W-20181023	Amber-1		
306903570	MB	MR	43396-W-1-01-022	HIC	199116	Albers-W-20181023	Alex-1		
306903602	MB	MR	43396-W-1-01-023	HIC	309119	Albinson-W-20181023	Amelia-1		
306903634	MB	MR	43396-W-1-01-024	HIC	419122	Albu-W-20181023	Albert-1		

Scroll to the bottom on the list of clients and copy the PHIN of the last client.

Paste the PHIN into **Client Search** in the PHIMS Training environment and view the client's immunization history and forecast. If the history exists, the file was loaded.

Q I get error messages when trying to load my files.

A Create a new data set. Start by creating a new folder for the training data and add the number 2 to the name. When entering the criteria in excel, Class Number in Day – enter "2."

Q There an easier way to do this?

A No. This is the most efficient way to create large sets of data for training. Trainer may modify or add new data to the clients and immunization histories manually if they want.