

Create Clients and Investigations 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

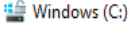
Naming Convention - Each set of names is unique for each class by the addition of the region and the date created. For the client: Altona-S20220605

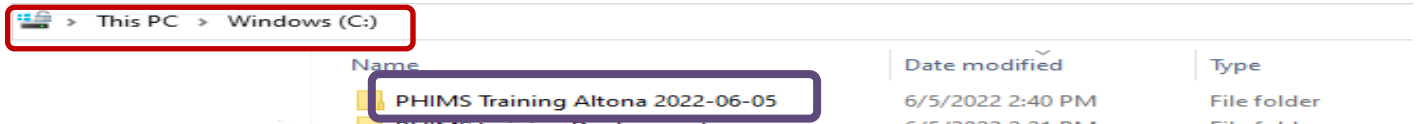
Altona-	S-	2022-06-05
Part of the "A" name set	Refers to the region, in this case SH-SS	Date selected in the spreadsheet: June 5, 2022

Create Clients and Investigations for Training

Step by Step Process

Preparing

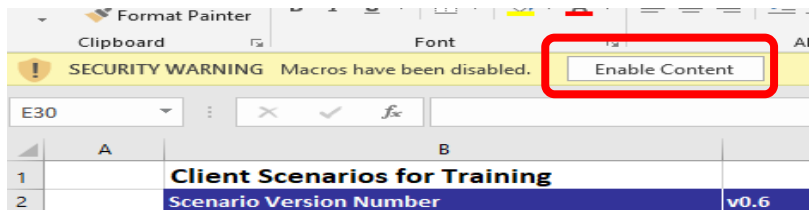
1. Shutdown all network applications: email, internet, other clinical apps
2. Create a Folder on the C:/ drive  to store the data. Develop a naming convention that includes the date of creation in the folder name. e.g. PHIMS Training Altona-2022-06-05.



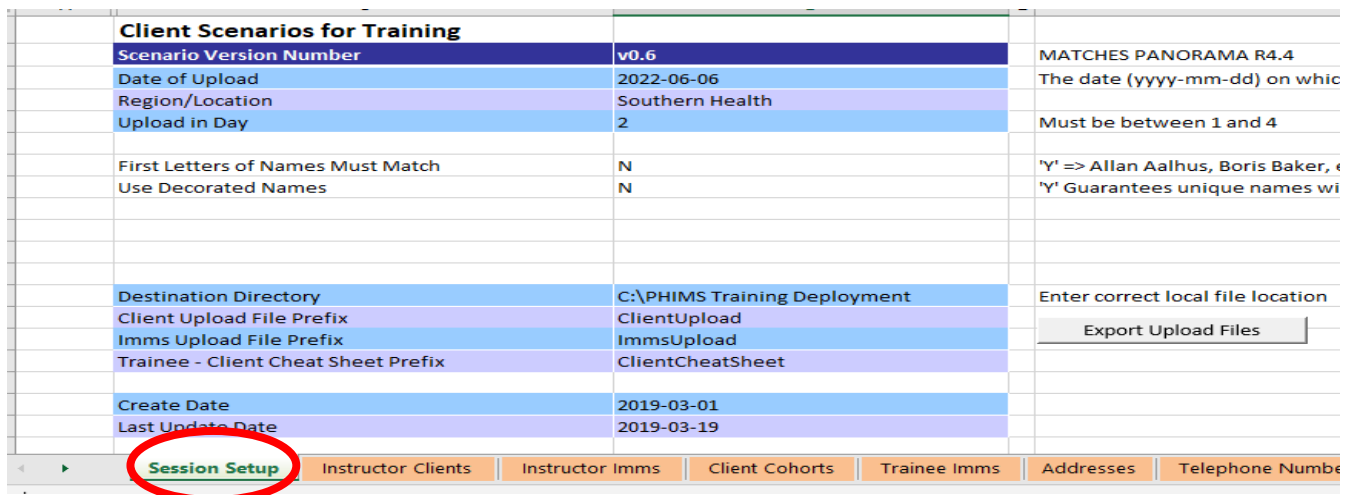
3. Copy the 'Immunization Training Client Data Load' excel template to your folder. The excel template can be found on the PHIMS Website in the Trainers folder.

Creating Data

1. Open the Training Client Data Load – excel template
The **Session Set** tab displays
 - a. Click **Enable Content**



- 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).



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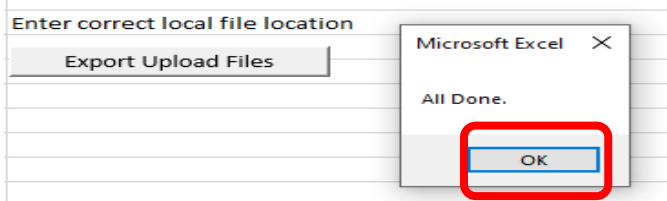
- g. Click on the **Client Upload Sheet** tab
 - i. Select an empty cell (e.g.: Column A; Row 6)
 - ii. Click the **F9** button on your computer 3-4 times (this will shuffle the client names)
 - iii. Select how many client's you need for the training. (this excel sheet has 2000 client names) (e.g. if you want 25 clients for the training session, highlight the other 1975 names and click delete).

Client ID	Health Card Number	HCN Province	ID2 Type	ID2	ID3 Type	ID3	Last Name	First Name	Mi
	22746616	MB	MR	44718-S-2-05-0001	HIC	182477	Meir	Emma	
	22746688	MB	MR	44718-S-2-13-0003	HIC	179988	Vengels	Mahala	
	202746719	MB	MR	44718-S-2-12-0004	HIC	192805	Underhill	Laszlo	
	202746759	MB	MR	44718-S-2-20-0005	HIC	980296	Schmidt		
	202746792	MR	MR	44718-S-2-21-0006	HIC	187502	Kalsow	Vinla	

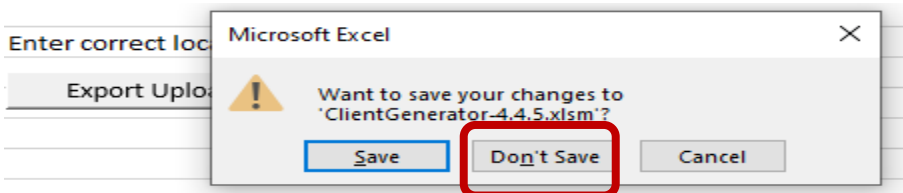
- h. Return to the **Session Setup** tab
 - i. Click **Export Upload Files**

Client Scenarios for Training		
Scenario Version Number	v0.6	MATCHES PANORAMA R4.4
Date of Upload	2022-06-06	The date (yyyy-mm-dd) on which
Region/Location	Southern Health	Upload in Day
Upload in Day	2	Must be between 1 and 4
First Letters of Names Must Match	N	'Y' => Allan Aalhus, Boris Baker, etc
Use Decorative Names	N	'Y' Guarantees unique names with
Destination Directory	C:\PHIMS Training Deployment	Enter correct local file location
Client Upload File Prefix	ClientUpload	Export Upload Files
Imms Upload File Prefix	ImmsUpload	
Trainee - Client Cheat Sheet Prefix	ClientCheatSheet	
Create Date	2019-03-01	
Last Update Date	2019-03-19	

- i. Click **Ok**

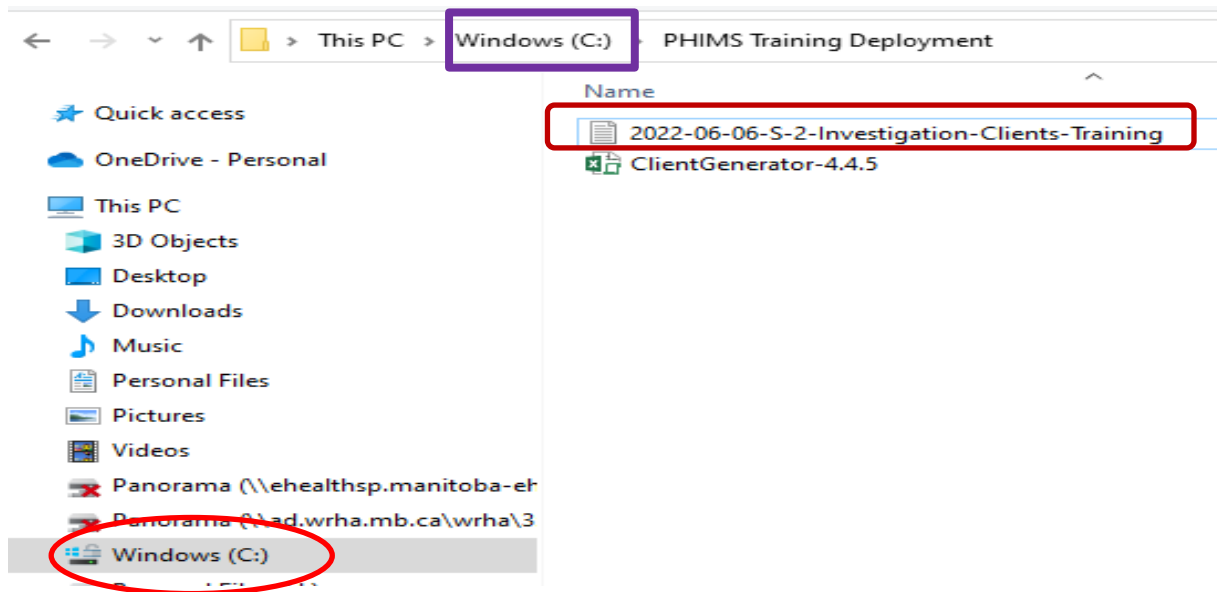


- i. Click the **X** (i.e. Close File)
- j. Click **Don't Save**



Create Clients and Investigations for Training

4. Open Folder in **Windows (C:)** drive to view created files. There will be one client investigation file.



Uploading Data into PHIMS

1. Open PHIMS > you **MUST** log in as **MB CDI Public Health Coordinator**
2. Click **Investigations**
 - a. LHN > Cohort > **Search Cohorts**
 - b. The **Search Cohort** page displays
 - c. Click **Search** (*you must click **Search** before the **Create Cohort** function activates*)

A screenshot of the 'Search Cohort' form in the PHIMS application. The form has a header with 'Search Cohort' and two buttons: 'Launch Adhoc Query Editor' and 'Search'. Below the header is a section titled 'Basic Search Criteria' with four input fields: 'Cohort ID:', 'Cohort Name:', 'Status:', and 'Created By User ID:'. Below these fields are two list boxes: 'Available Encounter Groups:' and 'Selected Encounter Groups:'. The 'Available Encounter Groups' list contains 'Communicable Diseases', 'Family Health', and 'Immunization'. There is a right-pointing arrow button between the two list boxes.

- d. Click **Create Cohort**

A screenshot of the 'Search Results' section in the PHIMS application. It shows a table with one row and one column. In the bottom right corner of the table, there is a button labeled 'Create Cohort', which is highlighted with a red box.

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- e. The **Create Cohort** page displays
 - i. Enter Cohort Name
 - ii. Select Static from the Cohort Type drop list
 - iii. The Effective From date defaults to current date and **select Effective To date**
 - iv. Select applicable **Available Encounter Groups** and move to the **Selected Encounter Groups**
 - v. The **Jurisdictional Organization** will default to the logged in Organization.

Create Cohort Launch Adhoc Query Editor Save Reset

Cohort Details

* Cohort Name: Training Upload Client Generator List - 2022-06-06

* Cohort Type: Static

* Effective From: 2022/06/06 To: yyyy/mm/dd

Available Encounter Groups: Family Health, Immunization, Outbreak Response, Rh Clinic, Screenings, Tuberculosis, Youth Services

Selected Encounter Groups: Communicable Diseases, Sexually Transmitted and Bloodborne Infections

Description: (200 characters remaining.)

* Jurisdictional Organization: Starts With Southern Health - Sante Sud, Southport, Manitoba

- vi. Click **Save**

The **Update Cohort** page displays – **Note** the Cohort ID number

Update Cohort Save Reset log print ?

Cohort ID: 294 Cohort Name: Training Upload Client Generator List - 2022-06-06 Encounter Group(s): Sexually Transmitted and Bloodborne Infections, Communicable Diseases Client List Name/ ID: -

Cohort Details

* Cohort Name: Training Upload Client Generator List - 2022-06-06

* Cohort Type: Static

- f. Click **Upload Client Data File**

Client Lists

Upload Client Data File Upload Client ID List

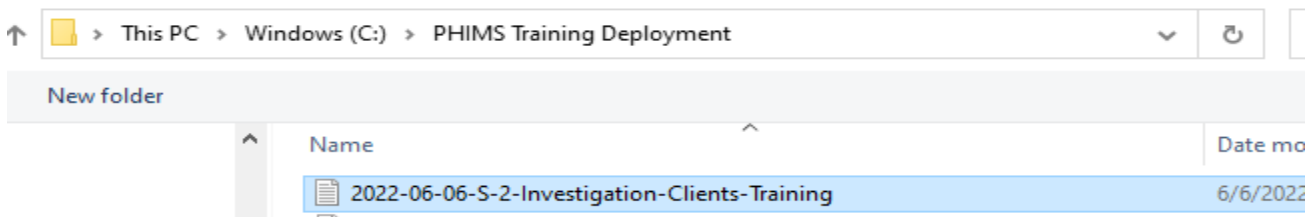
Create Clients and Investigations for Training

3. The **Upload Client** page displays
 - a. Select the check boxes beside – Health Card Number, Date of Birth and Gender

- b. Scroll to the Health Region **Information** section and **select** the applicable Health Region.

- c. Scroll to the **Upload File** section
 - i. Click **Choose File**

- d. The Windows (C:) drive opens, select the file, created (double click on the .txt file)



Create Clients and Investigations for Training

- e. The file name displays beside the **Choose File** button

Upload File [Hide Upload File](#)

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

* **File name:** 2022-06-06...-Training.txt

Potential Matches with a score ≥ 75 : Allow Reject

Upload to:

Client Index Only

Cohort ID: 294 **Cohort Name:** Training Upload Client Generator List - 2022-06-06

Cohort Existing Result Set:

Cohort New Result Set Name:

- f. Select the **Cohort New Results Set Name** – radio button – Enter a **Cohort Name**
- g. Click **Upload**
- h. The Upload Results section displays

Upload Results [Hide Upload Results](#)

2022-06-06-S-2-Investigation-Clients-Training.txt

Clients Added	0	Added to Cohort	24
Clients Updated	24		
Uploaded	24		
Rejected	0		
Total Processed	24		

- i. Scroll to the top of the page and click **Return to Maintain Cohort**

WORK MGMT | **INVESTIGATIONS** | OUTBREAKS | IMMUNIZATION | FAMILY HEALTH | INVENTORY | ADMIN

Upload Client

- 4. The Update Cohort page displays
 - a. Scroll to the **Client Lists** section
 - b. Select the radio button associated to the *Client List ID*
 - c. Click **Update Client List**

Client Lists

Client List ID	Client List Name	Number of Clients	Created On	Created By
<input checked="" type="radio"/> 272	Cohort - Client List Upload 2022-06-06	24	2022 Jun 06	Desrosiers, Robert

Total: 1

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5. The **Update Client List Members** page displays

Update Client List Members Save

Cohort ID: 294 i Cohort Name: Training Upload Client Generator List - 2022-06-06 Encounter Group(s): Sexually Transmitted and Bloodborne Diseases

Status: Active Cohort Source: Manual

Client List Details

Client List Details

Cohort ID: 294 Cohort Name: Training Upload Client Generator List - 2022-06-06 i

Client List Name: Cohort - Client List Upload 2022-06-06 Created By: Desrosiers, Robert Created On: 2

Actions on all records listed:

View Map Create Investigation Create Intervention Export Client List

Select all Clients

Actions on all records listed:

View Map Create Investigation

Client:
Client Last Name or ID

Preview Client View Imms Profile

Client ID 5260257

a. Click **Create Investigation**

Update Client List Members Save

Cohort ID: 294 i Cohort Name: Training Upload Client Generator List - 2022-06-06 Encounter Group(s): Sexually Transmitted and Bloodborne Diseases

Status: Active Cohort Source: Manual

Client List Details

Client List Details

Cohort ID: 294 Cohort Name: Training Upload Client Generator List - 2022-06-06 i

Client List Name: Cohort - Client List Upload 2022-06-06 Created By: Desrosiers, Robert Created On: 2

Actions on all records listed:

View Map Create Investigation Create Intervention Export Client List

Create Clients and Investigations for Training

6. The **Create Investigations from Cohort – Step 1 of 2** page displays

Cohort ID:	Cohort Name:	Encounter Group(s):	Client List Name/ ID:
294	Training Upload Client Generator List - 2022-06-06	Sexually Transmitted and Bloodborne Infections, Communicable Diseases	Cohort - Client List Upload 2022-06-06 / 272

* Required field

Create Investigations from Cohort - Step 1 of 2

- Scroll to the **Create Investigations from Cohort – Step 1 of 2** panel
- Select **Investigation Encounter Group**
- Enter **New Investigation Group Name**
- Click **Create Investigation**

* Required field

* Cohort Results Set: Cohort - Client List Upload 2022-06-06 (272)

* Investigation Encounter Group: Communicable Diseases

* Add investigations to Outbreak Group? No Yes

* New Investigation Group Name: Campylobacter

New Investigation Group Description:

Create Investigations Cancel

e. The **Create Investigations from Cohort – Step 2 of 2** page displays

Cohort ID:	Cohort Name:	Encounter Group(s):	Client List Name/ ID:
294	Training Upload Client Generator List - 2022-06-06	Communicable Diseases, Sexually Transmitted and Bloodborne Infections	Cohort - Client List Upload 2022-06-06 / 272

- Scroll to the **Disease Summary** panel
- Select applicable **Disease**
- Select **Provincial** from the **Authority**
- Select applicable **Classification**
- Scroll to the **Investigation Information** panel
- Select applicable **Disposition**

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Disease Summary Hide

* **Disease:**

* **Authority:** * **Classification:**

* **Classification Date:** / /
yyyy mm dd

Microorganism:

Species:

Subspecies:

Further differentiation:

Provincial Outbreak Code:

Information Source:

Investigation Information Hide

Priority:

* **Disposition:**

Responsible Organization / Investigator Hide

- l. Scroll to the **Responsible Organization / Investigation** panel
- m. Select applicable **Responsible Organization**
- n. Select applicable **Responsible Organization Workgroup**
- o. Do not select an Investigator Name
- p. Scroll to the **Reporting Notification** panel
- q. Select the radio button beside **Provider**, select MOH for your region
- r. The **Report Date (Received)** defaults to current date
- s. Click **Submit**

**At least one of the following dates is required.*

Report Date (Sent): / /
yyyy mm dd

Report Date (Received): / /
yyyy mm dd

- t. The Create Investigation from Cohort – Step 1 of 2 page displays with the message '**## investigation IDs successfully create from ## Client IDs**'

Create Investigations from Cohort - Step 1 of 2 ? 🖨

Cohort ID: 294	Cohort Name: Training Upload Client Generator List - 2022-06-06	Encounter Group(s): Sexually Transmitted and Bloodborne Infections, Communicable Diseases	Client List Name/ ID: Cohort - Client List Upload 2022-06-06 / 272
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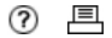
24 investigation IDs successfully created from 24 Client IDs.

- * Required field
- u. Click on the [Client List Name/ID](#) hyperlink
 - v. The **Update Client List Members** page displays
 - w.

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If you have another Encounter Group or another Disease to add to the Client List repeat Step 4 (page 7) if no, continue to page 11

Create Investigations from Cohort - Step 1 of 2



Cohort ID: 294	Cohort Name: Training Upload Client Generator List - 2022-06-06	Encounter Group(s): Sexually Transmitted and Bloodborne Infections, Communicable Diseases	Client List Name/ ID: Cohort - Client List Upload 2022-06-06 / 272
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Create Investigations **Cancel**

* Required field

Create Investigations from Cohort - Step 1 of 2

* **Cohort Results Set:** Cohort - Client List Upload 2022-06-06 (272)

* **Investigation Encounter Group:** ▼

* **Add investigations to Outbreak Group?** No Yes

* **New Investigation Group Name:**

New Investigation Group Description:

Create Investigations **Cancel**

7. Send Client List to trainee(s)

- a. Open the .txt file

2022-06-06-S-2-Investigation-Clients-Training - Notepad

File Edit Format View Help

Client ID	Health Card Number	HCN	Province	ID2 Type	ID2	ID3 Type	ID3	Las
Online Name	Preferred Language	Immigration File	Arrival	Year or Date	Immigration			
202746619	MB MR	44718-S-2-08-0001	HIC	374035	Arani Hedley			
155262881	MB MR	44718-S-2-12-0002	HIC	872782	Vachon Liberty			
202746688	MB MR	44718-S-2-13-0003	HIC	179988	Gatti Magnus			
202746718	MB MR	44718-S-2-11-0004	HIC	995602	Kemp Kemp			
202746748	MB MR	44718-S-2-09-0005	HIC	911233	Lam Ivo			

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- b. Highlight the file, right click on the mouse and select **Copy**

2022-06-06-S-2-Investigation-Clients-Training - Notepad

File Edit Format View Help

Client ID	Health Card Number	HCN	Province	ID2 Type	ID2	ID3 Type	ID3	Arrival Year	Date
202746619	MB	MR	44718-S-2-08-0001	HIC	374035	Arani	Hedley		
155262881	MB	MR	44718-S-2-12-0002	HIC	872782	Vachon	Liberty		
202746688	MB	MR	44718-S-2-13-0003	HIC	179988	Gatti	Magnus		
202746718	MB	MR	44718-S-2-11-0004	HIC	995602	Kemp	Kemp		
202746748	MB	MR	44718-S-2-09-0005	HIC	911233	Lam	Ivo		

- c. **Paste** Client Information in a blank excel file
 d. Send excel file to trainee(s).

	A	B	C	D	E	F	G	H	I	M	
1	Client ID	Health Card Number	HCN	Province	ID2 Type	ID2	ID3 Type	ID3	Last Name	First Name	Middle Initial
2		2.03E+08	MB	MR	44718-S-2-	HIC	374035	Arani	Hedley		
3		1.55E+08	MB	MR	44718-S-2-	HIC	872782	Vachon	Liberty		
4		2.03E+08	MB	MR	44718-S-2-	HIC	179988	Gatti	Magnus		
5		2.03E+08	MB	MR	44718-S-2-	HIC	995602	Kemp	Kemp		
6		2.03E+08	MB	MR	44718-S-2-	HIC	911233	Lam	Ivo		
7		2.03E+08	MB	MR	44718-S-2-	HIC	535306	Price	Dexter		
8		2.03E+08	MB	MR	44718-S-2-	HIC	394691	Scarpino	Wallis		

2022-06-06-S-2-Investigation-Clients-Training

ClientGenerator-4.4.5

Investigation Client Training - 2022-06-06