



Mass Immunization Event: Manage Clients - Added and Rejected Clients from an Upload

I. Manage Clients - Added/Created Incorrectly from an Upload

The **Upload Results** section displays

Upload Results	
Copy of ClientUploadTemplate_R4.4.4 OV Jewitt Gr 6.txt	
Clients Added	2
Clients Updated	0
Added to Cohort 2	
Uploaded	2
Rejected	0
Total Processed	2

Duplicate client records are occasionally created via the “**Upload Clients**” function when the school/community list has an incorrect PHIN number listed and that PHIN number is not assigned to anyone in the Client Registry. When this occurs, a new client record with the same name and birthdate is created in PHIMS resulting in two different records for the same person with two different PHIN numbers

Step 1: Review list of clients that were inadvertently created through the client upload

LHN > Reports & Analysis > **Reports**

Or

Panorama landing page – Reporting tile

LHN > Client > **MB1703 Clients Created** report

- **MB1703 Clients Created** - QRC

Step 2: Search and Update the client record in PHIMS

- Search using the **PHIN number** of the client that was created incorrectly
- In the Search Results section, click the checkbox beside the client and click **Update**
- Click the check box beside **Inactive**
- Message displays: **'Are you sure you want to change the client status?'**
- Click **OK**
- Select **Registered in Error** from the drop-down menu as the Reason(s) for being Inactive
- Click **Save**



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Step 3: Remove incorrectly added/created client from Mass Imms Worksheet (if already added before client was inactivated)

Search for the Mass Imms Event, **MIE Search** - QRC

- Select **Update**

The **Update Mass Imms Event** page displays. Scroll to the **Client List** section

- Select the check box beside the client that was inactivated/incorrectly created
- Click **Remove**
- Message displays: *'The selected clients will be removed from the client list. Continue with the removal?'*
- Click **Confirm**
- Add the correct client to the Mass Imms Event worksheet using the following search criteria: First Name, Last Name and DOB. **MIE Add-Remove an Individual** - QRC
- Click **Save**

Step 3: Update the original Source excel spreadsheet correcting the Health Card Number (PHIN) to avoid recreating duplicate client records (save again as a **Text (tab delimited)/.txt** file for uploading)



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II. Manage Clients - Rejected from an Upload

The **Upload Results** section displays

In this scenario:

- 11 clients were processed
- 9 clients were updated
- 1 client was rejected

Upload Results	
Bertrun E Gavin Upload Template.txt	
Errors found in 1 record(s). Download Reject file to correct and re-upload.	
Clients Added	1
Clients Updated	9
Uploaded	10
Rejected	1
Total Processed	11

Step 1: Click **Download Reject File** (This process might take a few seconds, window appears, **DO NOT** click Close).

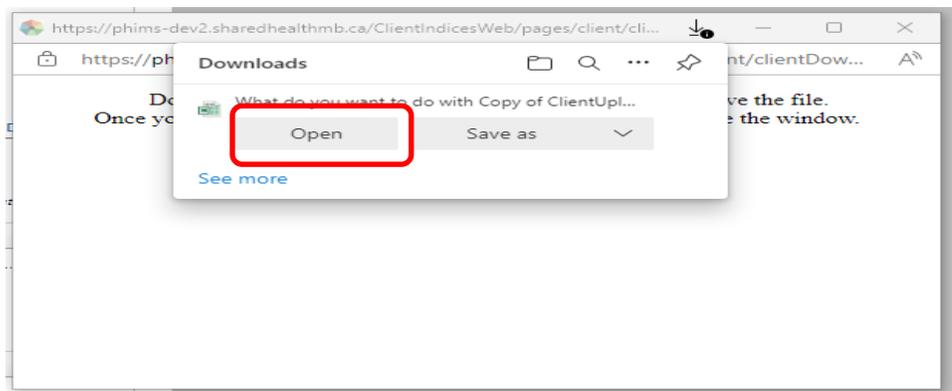
Download process will start soon then it will ask you to save the file.
Once you save the file in your system, click close button to close the window.

Close

Another Downloads window displays. Click **OPEN**



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Another message displays, click **YES** to open the Excel file to review the client(s) that have been rejected

Step 2: Scroll to the end of the excel file, column DM to view the **Error Description**

	DM
Client ID	Error Description
966	First name is incorrect, Health Card Number duplication, First name is mandatory,

Reasons why a client might be rejected:

- Name is incorrectly spelled
- Inactive Clients (when uploading Cohort created uploads)
- Duplicate Health Card Number (PHIN)
- Forgot to enter some mandatory information on the Source excel spreadsheet
- Different last or first name from the Source excel spreadsheet (Source = the file you received from the School)
- Date of Birth is not formatted correctly (should be in yyyy-mm-dd format)

Close the spreadsheet

Step 3: Search for client in PHIMS

Search for the correct client in PHIMS, ensure this is the correct client and correct demographic details.

DO NOT update Last Name, First Name, Gender, DOB or Health Card Number (PHIN) in PHIMS.



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Step 4: Update client's information

- Update Client's information on the **Source** excel spreadsheet
- Repeat for all rejected clients
- Prepare the School/Community Client List to Upload ***Prepare List Upload'*** (Guide)
- Save excel spreadsheet as a **Text (tab delimited)/.txt** file
- **Re-Upload** School/Community Client List