Preparing a Client List for PHIMS Upload

Step 1: Tips for Preparing the File for PHIMS Upload

Format the client list into excel before copying and pasting the information into the upload template. Verify that:

- The column headings are correct and that you have the mandatory information that is highlighted in yellow on the upload template.
- Only one set of data is in each column. For example, if the first name and last name are in the same column, the names must be separated into two separate columns. If there are multiple data in one column, use the "text-to-column" function in Excel (Data – Text to Columns) to separate the fields into distinct columns.
- All characters such as commas, dashes, accents, hyphens and spaces must be removed from the client list before it can be copied and pasted into the upload template or the data will be rejected.

Step 2: Prepare File to be PHIMS Uploaded

- Before populating the upload template, ensure the following mandatory information are in the **correct formats**:
- PHIN (9 digits without any delimiters such as hyphens, commas or spaces – e.g. 987654321)
- Province (Under the Province Column use the initials MB for Manitoba)
- Last Name
- First Name
- Gender (Options are **M** (male) **F** (female) **U** (undifferentiated)
- DOB (yyyy-mm-dd)

It is recommended that all formatting be completed on the original source file and saved using prescribed file naming convention. Remember to save the client lists in a location where they can be easily found and retrieved.

Step 3: Populate the Client Upload Template

- **Open** the formatted source client list (in an excel file format)
- **Open** the Client Upload Template (A copy can be found on the PHIMS Website at www.phimsmb.ca in the Immunization tile > Mass Immunization Event subfolder. *Always use a 'fresh' copy of the client upload template*.
- **Populate** the Client Upload Template by *copying and pasting* the required information from the *source client list* to the *client upload template*.
- **Save the newly created upload file**
  - First **"File Save As"** using a naming convention that will make the file easy to find
  - Next **"File – Save As" Text (tab delimited)/.txt** file