



Mass Immunizations Event:

Assign Education Information to Multiple Students with Client Upload

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QRC

Points to Remember:

- When the school is updated using a client upload template (i.e. class list) the new school overrides/expires any previous school assignment.
- Students on a class list with no PHIN should be searched in PHIMS to see if a PHIN exists for them (**Search Client** – Guide).
- Students with no PHIN should not be included on the upload template as they will be rejected because the PHIN is a required field.
- Students with no PHIN will need a client record is created for them in PHIMS (**Create Client** - QRC).
- Client files that are marked as “inactive” should be updated to “active” in PHIMS.
- If the upload results indicate that clients have been added (created) during the upload process, refer to **MB1703 Clients Created - QRC** and **Manage Clients – Created/Rejected - Guide** document to manage clients that have been inadvertently created.
- **Important Note:** Do not update the Health Region Information and SDL Id on the client upload page (Default Values section). Clients are assigned to an Org and SDL based on their postal code, and changes to the Org and SDL during client upload will overwrite that assignment, causing clients to be reassigned to the wrong Org and SDL.

Tips for Preparing the File for Upload:

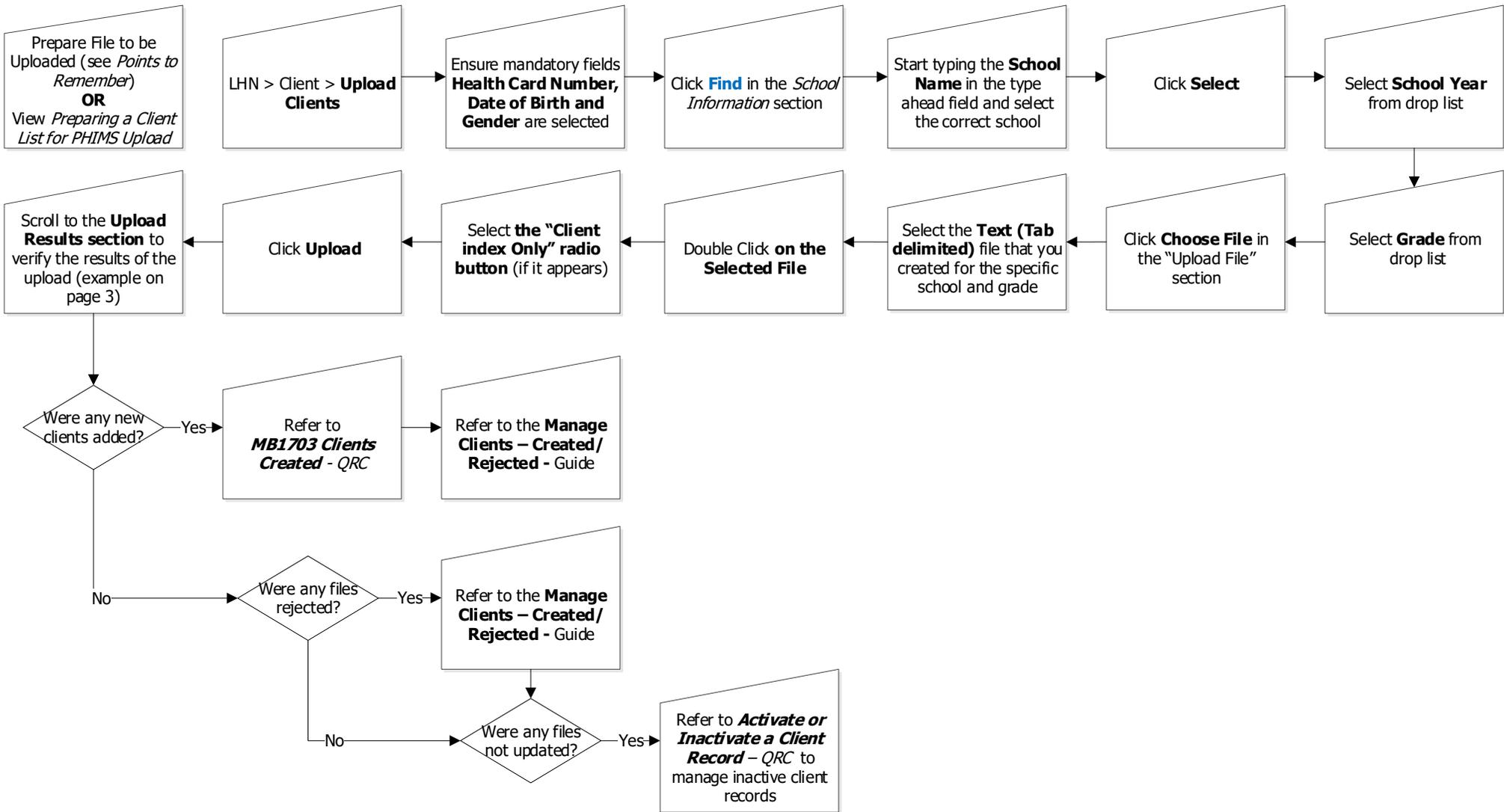
- Always use a new or “fresh” copy of the upload template versus reusing a template that has already been uploaded, as this will minimize the number of rejected files and/or the upload template from being corrupted. The upload template can be found on the PHIMS website.
- Format the class list into excel before cutting and pasting the information into the upload template.
- In the source file (Class list formatted in Excel), verify that:
 - The column headings are correct and that you have the mandatory information that is highlighted in yellow on the upload template: Health Card Number (PHIN), Health Card Province (MB), Last Name, First Name, Gender, Date of Birth, Class (optional).
 - The date of birth column is formatted correctly (YYYY-MM-DD).
 - 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.
 - All characters such as commas, dashes, accents, hyphens and spaces must be removed from the source file (original class list) before it can be copied and pasted into the upload template or the data will be rejected. This can be done using the find and replace function in Excel.
 - The initials MB under the Province column have been added
 - Classroom is an optional field
 - Capital letters to assign gender: F, M, U (Undifferentiated)

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
Client Id	Health Card Numbe	Health Card F	ID2	ID2	ID3	Type	ID3	Last Name	First Name	M	St	G	A	S	S	Sc	S	S	Grade	Class	A1	A1	Gender	Nat	DOB (yyyy-mm-dd)	Health
	987654321	MB						Hood	Robin														M		2008-05-09	
	789456123	MB						Lee	Stan														M		2008-06-26	
	222333444	MB						June	April														F		2008-01-25	
	888777444	MB						Lion	Dandy														M		2008-05-21	



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Original Class List Upload file had 12 students:

- 1 client was **added** (created) – Refer to the *Manage Clients – Created/Rejected Guide*
- 10 clients were **updated**
- 1 client was **rejected** – Refer to the *Manage Clients – Created/Rejected Guide*
- **12 clients were processed**

Upload Results

Teulon Elementary Gr 6 .txt **Errors found in 1 record(s). Download Reject file to correct and re-upload.**

Clients Added 1

Clients Updated 10

Uploaded 11

Rejected 1

Total Processed 12

[Download Reject File](#)