



# Immunizations: Add a Client list to a Mass Immunization Event (not for school events)

## Process of adding a client list to a Mass Immunization Event:

1. Retrieve list from source file (Sharepoint, RHA Shared Drive, etc)
2. Convert list into a **Text (Tab delimited) (\*.txt)** – ensure to name your file with both appointment clinic dates for easier retrieval to add to 2<sup>nd</sup> dose Mass Imms event – i.e. "COVID Clinic Rady – Dec 16, Jan 6"
3. Search previously created event by Event ID or Create Mass Imms Event – enter details

**Search Mass Imms Event** Search Retrieve Reset ... Print ?

**Search Mass Imms Event** ^

Event ID:

Event Title:

Status:

Created By:

Event Type:

Event Date Range:  
From:

Organization:

Service Delivery Location:

**Search Results** ✓ ^

Create

Click **Save**

**Event ID:** Displayed

**Update Mass Imms Event** Save Reset

**Mass Immunization Event**

**Event ID:** 11013015

\* **Event Title:**

**Description:**

\* **Event Date:**



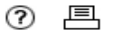
# Immunizations: Add a Client list to a Mass Immunization Event (not for school events)

4. Scroll to the **Client List** panel
5. Click **Upload Client List**

The screenshot shows a web interface with three main panels: 'Client List', 'Documents', and 'Verification'. The 'Client List' panel is active and contains three buttons: 'Search Clients', 'Search Cohort', and 'Upload Client List'. The 'Upload Client List' button is circled in red. The 'Documents' panel below it shows a 'Context Document' field and a message: 'No Documents exist for the current page context.' The 'Verification' panel is partially visible at the bottom.

**\*This redirects you to the "Upload Client" page.**

## Upload Client



\* Required field

The screenshot shows the 'Upload Client' page. At the top, there is a header 'Upload Client Data' with a 'Hide Upload Client Data' link. Below this is a section titled 'Mandatory Fields' with a 'Hide Mandatory Fields' link. A note states: 'If only First Name and Last Name are provided, Person Matching Algorithm will not be triggered.' Underneath, there is a section 'Enforce Following Mandatories:' with a list of checkboxes: 'Health Card Number' (checked), 'Date of Birth' (checked), 'Gender' (checked), 'Validate Address' (unchecked), and 'Parent/Guardian Information' (unchecked).



# Immunizations: Add a Client list to a Mass Immunization Event (not for school events)

## 6. Scroll to **Upload File:**

- **Browse** for the text.tab file you wish to upload
- (Notice that a 'Cohort ID' number gets automatically assigned when you upload a file; the cohort name matches the Mass Imms Event title, and the Cohort New Result Set Name matches the description)
- Ensure the radio button is on '**Cohort New Result Set Name**'
- **Click upload**

**Upload File** [Hide Upload File](#)

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

\* File name: Browse... December 17, 2020 - Copy (4).txt

Potential Matches with a score  $\geq 75$  :  Allow  Reject

Upload to:

Client Index Only

Cohort ID: 14139 Cohort Name: Covid 19 immunization Clinic Dec 16, 2020

Cohort Existing Result Set:

Cohort New Result Set Name:

---

Upload

## 7. Scroll to **Upload Results\*\***

**Upload Results** [Hide Upload Results](#)

December 17, 2020 - Copy (4).txt Errors found in 6 record(s). Download Reject file to correct and re-upload.

Clients Added	1	Added to Cohort 0
Clients Updated	17	
<hr/>		
Uploaded	18	
Rejected	6	<input type="button" value="Download Reject File"/>
<hr/>		
Total Processed	24	

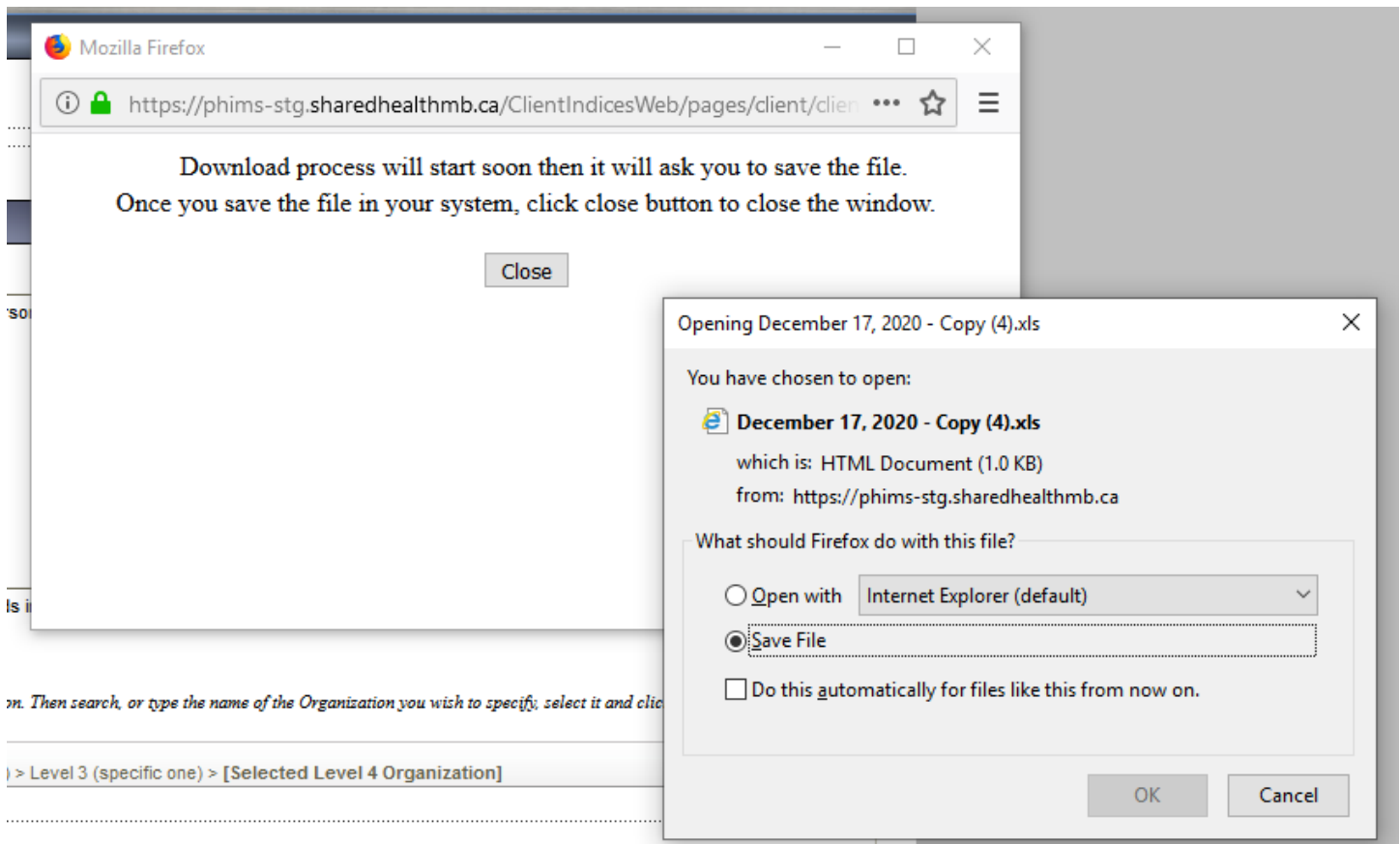
\*\*If you get the message '*Errors found in xx record(s). Download reject file to correct and re-upload.*' this indicates there are client rows that contain incorrect information – i.e. incorrect PHIN number, birth date, name, etc. If the client information in the text file is not an exact match to the client record in PHIMS, the row



# Immunizations: Add a Client list to a Mass Immunization Event (not for school events)

will be rejected. **If you do not have any errors/rejected records**, skip the next steps, and return to the mass immunization event and review the added list of clients.

## 8. Click **Download Reject File**



## 9. Select **Save File** - Click **OK**

10. Open the Original excel file and the Rejected excel file to compare and **remove the rejected client rows** from the Original file.

11. **Save** this **revised** Original file, as a *Text (Tab delimited) (\*.txt)* file again.

12. Return to the Mass Imms Event and upload the newly revised file.



# Immunizations: Add a Client list to a Mass Immunization Event (not for school events)

## Upload File

[Hide Upload File](#)

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

\* File name:  No file selected.

Potential Matches with a score  $\geq 75$  :  Allow  Reject

Upload to:

Client Index Only

**Cohort ID: 14140** Cohort Name: Covid 19 immunization Clinic Dec 16, 2020

Cohort Existing Result Set:

Cohort New Result Set Name:

## Upload Results

[Hide Upload Results](#)

December 17, 2020 - Copy (4).txt

Clients Added	0	Added to Cohort 18
Clients Updated	18	
Uploaded	18	
Rejected	0	
Total Processed	18	

\*Notice the **Cohort ID** number has changed

13. Click **Return to Mass Imms Event** button found at the right top or bottom of the page

## Upload Client





# Immunizations: Add a Client list to a Mass Immunization Event (not for school events)

14. Upon return to the 'Update Mass Imms Event' page – **click Worksheet**

**Update Mass Imms Event** Save Reset **Worksheet** More log print ?

**Mass Immunization Event** ✓ ↑

Event ID: 11013015

\* Event Title: Covid 19 immunization Clini ... Description: Staff Clinic Bannatyne Campus Dec, 16, 2020

15. Scroll to the **Event Worksheet**, in the **Client:** box, click the drop down arrow under 'Search Type' and select 'Health Card Number'. Enter the rejected clients PHIN number and select. If the PHIN number does not generate a client to select, change the search type to 'Name' and start typing the client's last name followed by a comma (,) then first name, and select the client.

**Event Worksheet** Update Event More log print ?

Cohort ID: 14140 Cohort Name: Covid 19 immunization Clinic Dec 16, 2020 Encounter Group(s): Immunization Client List Name/ ID: Staff Clinic Banatyne Campus Dec 16, 2020 / 12358

**Event Worksheet** ✓ ↑

Event Title: Covid 19 immunization Clinic Dec 16, 2020 Event ID: 11013015  
Event Date: 2020 Dec 16 Location: University of Manitoba Bannatyne Campus  
Event Type: Outbreak Status: Open  
Created By: Desrosiers, Robert

Displaying 24 out of 24 clients

Client: 184303528 Search Type: Health... Add

Zupan, Vijay | 63241 | 184303528 | Male | 1958 Jul 27

Immunization Client Event Status Client Event Summary Deferrals Preview Client

View Consent Update Client Assess and Immunize Client Imms Profile

Alerts	Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter