



# Mass Immunization Event: Upload Multiple Community Client Lists to ONE MIE

## Upload Multiple Community Client Lists to ONE MIE

**Step 1: Prepare Lists for Upload** (*Guide*) (client list will need to be uploaded separately)

## Step 2: Search and Create Cohort

LHN > Cohort > **Search Cohorts**

The **Search Cohort** page displays

- Click **Search** (*you must search before you can create*)
- Click **Create Cohort**

The screenshot shows the 'Search Cohort' interface. On the left is a navigation menu with 'Search Cohorts' highlighted. The main area contains 'Basic Search Criteria' with fields for Cohort ID, Name, Status, and User ID. Below are 'Available Encounter Groups' and 'Selected Encounter Groups' lists. A 'Search' button is highlighted with a red box. At the bottom right, a 'Create Cohort' button is also highlighted with a red box. Red arrows indicate the flow from the 'Search' button to the 'Create Cohort' button.

The **Create Cohort** page displays

## Step 3: Create Cohort

The screenshot shows the 'Create Cohort' interface. It features a 'Cohort Details' section with fields for 'Cohort Name', 'Cohort Type', 'Effective From' (with a calendar icon), and 'To' (with a date format 'yyyy/mm/dd' and a calendar icon). Below are 'Available Encounter Groups' and 'Selected Encounter Groups' lists.



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- Enter a *Cohort Name*
- Cohort Type: select **Static**
- Select **Effective From** Date & **Effective To** date (example: one month after event date)
- Select **Available Encounter Groups**
- Ensure the **Jurisdictional Organization** is correct (example: St. Vital PHU)
- Click **Save**



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

**Step 4:** On the **Update Cohort** page:

- Click **Upload Client Data File**

The **Upload Client** page displays

**Important Note:** Ensure the Mandatory Fields: **Health Card Number, Date of Birth and Gender are checked off**. Also, DO NOT update the Health Region Information and SDL Id on the client upload page (Default Values section).

**Step 5:** Choose File and retrieve Cohort Client List, the **Text (tab delimited)/.txt** file



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- Select the radio button beside **Cohort New Results Set Name**
- Enter a **Cohort New Result Set Name** – a cohort can have multiple result sets (i.e. multiple lists of clients). Suggest naming the new result set to match the immunization event (e.g. Flu Clinic Nov 3 2021 Morden Complex)
- Click **Upload** and scroll to the 'Upload Results' section

**Step 6:** Manage Rejected or Added Clients, if no added and/or rejected clients proceed to Step 7

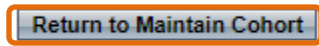
- Refer to the **Manage Clients – Create/Rejected (Guide)**

**Step 7:** Return to *Step 4* to upload additional client lists to the cohort

- **Note:** Each client list/results set will have different names e.g. For multiple communities

**Step 8:** When ALL Client Lists have been uploaded

- Click **Return to Maintain Cohort**



The **Update Cohort** page displays

- Scroll to the **Client Lists** factory table to view all lists attached to the cohort

## Step 9: Adding the Cohort to the Mass Immunization Event

LHN > Immunizations > Mass Immunization Events

The **Search Mass Imms Event** page displays

- Enter **Event ID**
- Click **Search**
- Select the radio button associated to the Event ID in the Search Results panel
- Click **Update**

The **Update Mass Imms Event** page displays

- Scroll to the **Client List** panel
- Click **Search Cohort**

The **Link Cohort – Client List** modal opens

- Select the **Cohort Name** you had entered for this Cohort from the drop list



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- Click **Select**

The **Update Mass Imms Event** page displays

- Scroll to the **Client List Content** section - All Client List associated to that Cohort have been uploaded to the Mass immunization Event
- Click **Save**
- Click **Worksheet**

The **Event Worksheet** page displays

- **Select** the Cohort client list you would like to display on the worksheet proceed to appropriate QRCs to record immunization etc.
- Repeat with all Cohort clients lists associated with the Mass Imms Event