



Mass Immunization Event: Upload School Client List for Multiple Class/Grades

Upload School Client List with Multiple Classes/Multiple Grades (e.g. multiple grades in one school)

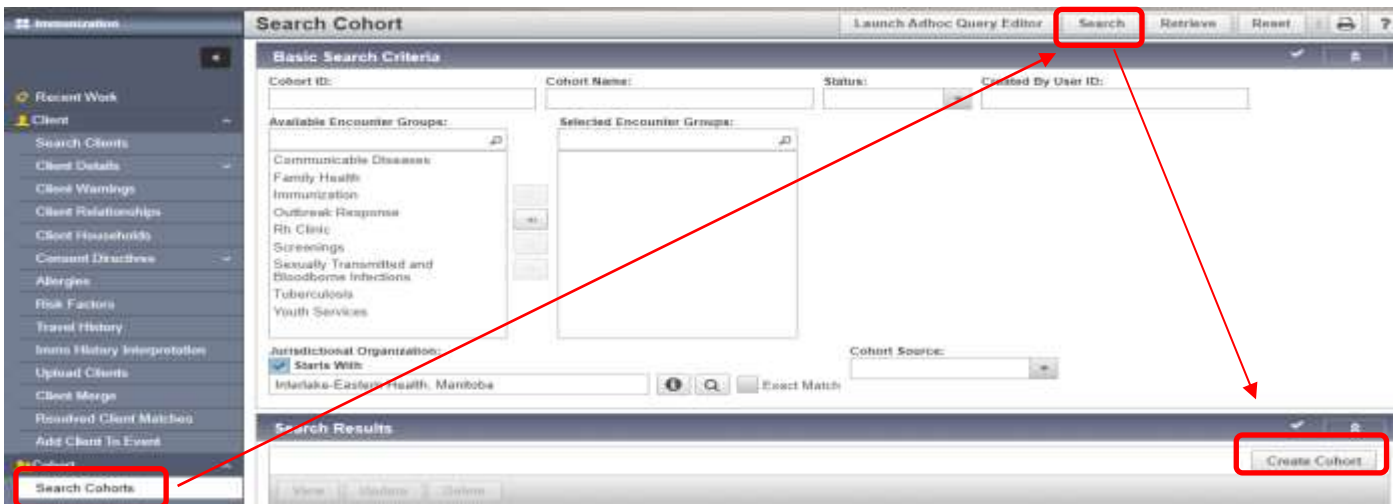
Step 1: Prepare List for Upload (*Guide*)

T	U	V	W	X	Y	Z	
Class	Alternate Name	Typ	Alternate Last Name	Alternate First Name	Gender	Nationality	DOB (yyyy-mm-dd)

Step 2: Search and Create Cohort

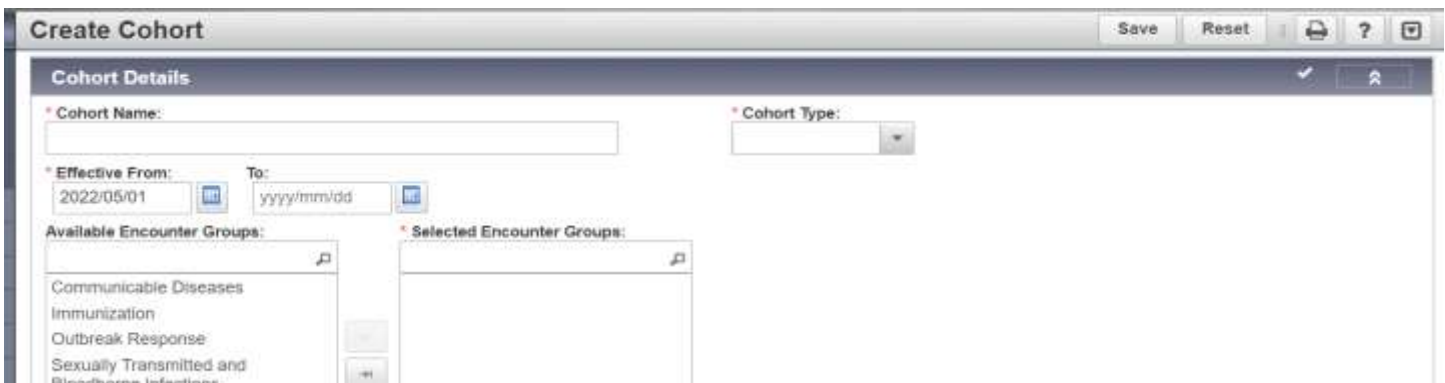
Immunization: LHN > Cohort > **Search Cohorts**

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



The **Create Cohort** page displays

Step 3: Create Cohort





Mass Immunization Event: Upload School Client List for Multiple Class/Grades

- Enter a **Cohort Name**
- Cohort Type: select **Static**
- Select **Effective from** Date & select an **Effective To** date (example: one month after event)
- Select **Immunization** under the **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**

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 4: Scroll to the **School Information** section

- Select School Name
 - Click **Find** – Enter School Name (click the school’s name when displayed) – Click **Select**
- Select School Year
- Select Grade



Mass Immunization Event: Upload School Client List for Multiple Class/Grades

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

Upload File Hide Upload File

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

* File name: Choose File copy of Client...e 4 Hep B.txt

Potential Matches with a score ≥ 75 : Allow Reject

Upload to:

Client Index Only

Cohort ID: 285 Cohort Name: Testing uploading a school list

Cohort Existing Result Set: Cohort New Result Set Name

Cohort New Result Set Name: Testing uploading a school l

Upload Clear Cancel

- Select the radio button beside **Cohort New Results Set Name**
- Enter a **Cohort New Result Set Name** – a cohort can have multiple result set (i.e. multiple lists of clients). Suggest naming the new result set to match the immunization event (e.g. River East School Grade 4)
- 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 – Created/Rejected (Guide)**

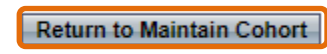
Step 7: if more clients list to be added, Return to **Step 4** to Upload additional client lists to the cohort.

Note: Each client list/results set will have different names e.g. For multiple grades in a school (River East Gr 4 HB, River East Gr 5 HPV) or for multiple classes in a grade (River East Gr 6A, River East Gr 6B).

Note: If you are adding a different Grade list, ensure the Grade under the School Information is also updated before uploading the client list into the Cohort.

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



Mass Immunization Event: Upload School Client List for Multiple Class/Grades

Client Lists

Client List ID	Client List Name
279	Upload Class List grade 4 Hep B
280	Upload Class List grade 5 HPV
281	Upload Class List grade 9 Tdap
Total: 3	

- Select the radio button beside the first Client Lists ID number
- Click **View Client List**
- Click the **printer icon** to print the class list for the first Client List Name
- Repeat for other Class List ID

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
- 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 on the Client List drop list to view the Client lists associated with that Cohort



Mass Immunization Event: Upload School Client List for Multiple Class/Grades

Client List Content

Client List: Client:

- Upload Class List grade 4 Hep B
- Upload Class List grade 5 HPV
- Upload Class List grade 9 Tdap**

- Click **Save**
- Click **Worksheet**

The **Event Worksheet** page displays

- **Select** the Class List/Grade you would like to display on the worksheet

Client List: Client: Search Type:

Record immunization | Client Event Status | Client Event Summary | Deferrals | Ethnicities

Preview Client | Update Client | Assess and Immunize | Client Imms Profile | Clinical Notes

Client Name	Date of Birth	Gender	Immunizi... Agent	Forecast Status	Consent Readiness
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

- Continue to the Immunization Agent column and filter to the Agent that is associated to the Class List (e.g. grade 4 Hep B)

The Client list for the selected grade displays – proceed to appropriate QRCs to record immunization etc.

Alerts	Client ID	Client Name	Date of Birth	Gender	Immunizi... Agent	Forecast Status	Consent Readiness	Event Status
<input type="checkbox"/>	6002	Aeneas, Emrys	1947 Apr 20	Male	<input type="checkbox"/> HB	Not Forecasted	Missing	---
<input type="checkbox"/>	6002	Aeneas, Emrys	1947 Apr 20	Male	<input type="checkbox"/> HPV-9	Overdue	Missing	---
<input type="checkbox"/>	6002	Aeneas, Emrys	1947 Apr 20	Male	<input type="checkbox"/> Tdap	Not Forecasted	Missing	---
<input type="checkbox"/>	6000	Allison, Cathy	1989 Aug 06	Female		Overdue: Recombivax	Missing	---

- Repeat process for other grades or classes listed