COVax_{ON} Bulk Client Upload Job Aid

Your Profile: COVax_{ON} Site Super User
Prepare and upload new client data into COVax_{ON} using the Bulk Client Upload functionality.

Bulk Client Upload Activities
This job aid covers the following key sections. **Click the relevant link:**

#	Section	Description
1	Populate the MOH Provided Clients Load Template	Populate client data in the MOH "CLIENTS_LOAD_TEMPLATE"
2	Upload Clients into COVax_{ON}	1. Create a New Mass Data Load Item 2. Populate the Client_Client Data Insert_Template 3. Upload Populated Client Data Template
3	Resolve Errors	If an error occurred and certain client records are not uploaded, follow the error resolution steps

Additional Information
- Refer to the "**User Profile Set Up**" job aid to learn more about your system access. Refer to the "**MOH Clinical Package**" on SharePoint for forms and process information that you might need in addition to this job aid.
- Refer to the "**Check In**" job aid to learn how to create new individual clients in COVax_{ON.}

Disclaimer

Data Privacy: Users with access to COVax_{ON} can see the demographic details and HCNs of other clients in the system when searching for a particular person. The information is presented this way to help ensure that users access the correct client record and to reduce the risk of either not locating a client's record or improperly creating duplicate client records. **As required by PHIPA and under the terms of the Acceptable Use Policy, system users are only permitted to access the information of individuals to whom they are providing care or for other purposes that are specifically authorized.** COVax_{ON} records detailed audit transaction logs that inform the MOH of which client records were accessed by each user, and what actions they took in the system. Any concerns that are identified about improper access to the system will be investigated and appropriate actions taken.

COVID Public Health: All COVID public health measures must be followed in alignment with the tasks outlined in this job aid

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1. Populate the MOH Provided Clients Load Template

Description:

The Ministry of Health has provided a template called the "**CLIENTS_LOAD_TEMPLATE**" to assist with a bulk client upload. Follow the below instructions to ensure the template is completed accurately. There are embedded rules within the template that ensure the field formats are correct. **The latest template can be accessed on the MOH SharePoint.** Check with your site lead for details regarding how to access the MoH SharePoint Site.

Notes:

Please note these important considerations when populating the CLIENTS_LOAD_TEMPLATE:

| Tab	Important Notes
1_Instructions	• Review & utilize the instructions on this tab to populate the rest of the template
2_Data_Elements	• Review tab to understand the data you are collecting • Red fields are mandatory. If they are not populated accurately on tab "**4_Client-List**", the upload will be unsuccessful
3_Defaults	• The fields populated on this tab will auto populate the related fields on the "**4_Client_List**" tab • The column "**Vaccination Event #**" allows Site Super Users to allocate a list of clients to a specific Vaccination Event. This number is populated on the Vaccination Event record in COVax₀ₙ upon creating a new record. The User can copy and paste the Vaccination Event # from the VE record in COVax₀ₙ into the proper cell for the upload
4_Client_List	• Populate information for the clients you want to upload into COVax₀ₙ here • For field requirements for each column, click on the heading to view additional details • For birth dates, ensure you are always using the "**YYYY-MM-DD**" format. This is the only format that the COVax₀ₙ system will accept. This is a mandatory field. See further details on this in the Section 3: "**Resolve Error**" of this document • If the Reason for Immunization field is populated with a value from Congregate Living, Long Term Care, or Retirement Home, the Institution field will become mandatory. For these Reason for Immunizations options, if an Institution is not populated, the user will receive an upload error. For all other Reason for Immunization values selected, the Institution field is optional
5_Validate	• Use this tab to review the results of your data entry. Fields in this tab will highlight if there are any missing field entries in the "**4_Client_List**" tab and will allow Users to ensure the accuracy of their template upload
6_Invalid_HCNs	• Use this tab to review if any clients are being uploaded with an invalid HCN or without an HCN. This will allow Users to ensure the accuracy of their template
7_Change_Log	• Review recent changes to this template. This template is updated frequently. Download a new version of this template from the MOH SharePoint each time you want to perform a client upload

2. Upload Clients Into COVax_{ON}

To create a new mass data load record in COVaxON, use the following 3 steps:

2.1	**Create a New Mass Data Load Item**	Create a new Mass Data Load item in COVax_{ON} and download the template
2.2	**Populate the Client Data Insert Template**	Copy the client data from the "CLIENTS_LOAD_ TEMPLATE" into the downloaded "Client_Client_Data Insert template" from COVax_{ON}
2.3	**Upload Populated Client Data Insert Template**	Once the "Client_Client Data Insert_Template " is populated with the copied client data, save the document, and upload the template back into COVax_{ON}

2.1 Create a New Mass Data Load Item

Description:
When adding new clients into COVax_{ON}, follow these steps to create a new mass data load item, and download the Client Data Insert CSV template.
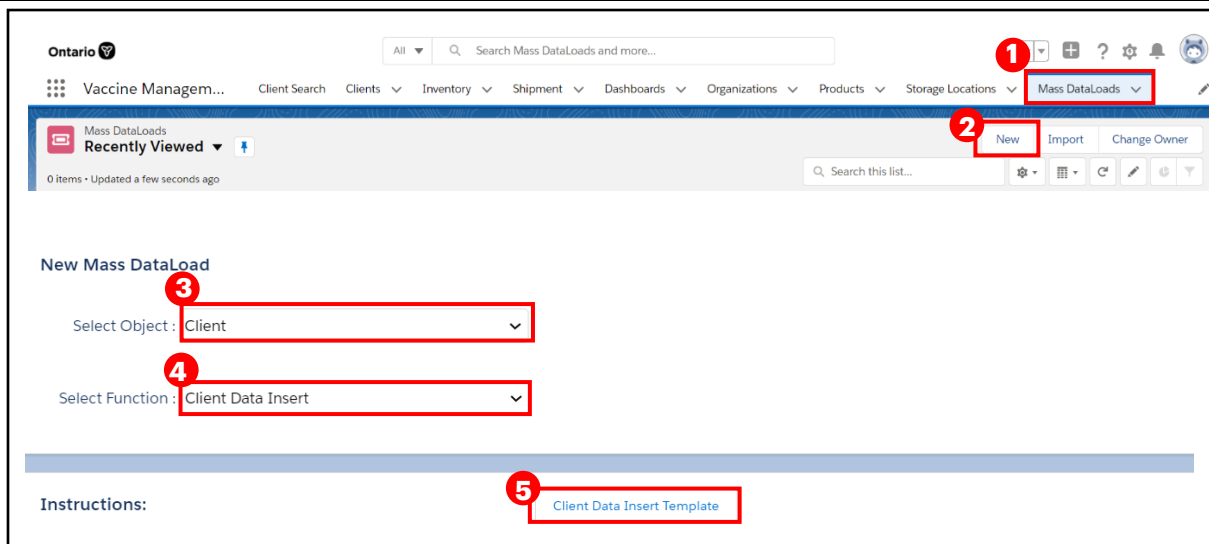

How:
1. In COVax_{ON}, click the "**Mass DataLoads**" tab
2. Click "**New**" from the right-hand corner
3. From the "**Select Object**" dropdown, select "**Client**"
4. From the "**Select Function**" dropdown, select "**Client Data Insert**"
5. To download the CSV template, click "**Client Data Insert Template**". The document will download onto your computer. It can be saved directly to another file/folder/desktop or kept within your downloads folder.

2.2 Populate Client_Client Data Insert_Template

Description:
Once the "**Client_Client Data Insert_Template**" CSV template downloads, populate it using the information in the **"CLIENTS_LOAD_TEMPLATE,"** to ensure you accurately capture the data for new clients to be uploaded into COVax_{ON}.

- **Copy and Paste Fields using "Control C" + "Control V" functionalities. Do not paste as special values or text as the format will change and the file upload won't be accepted.**
- ***The "Client_Client Data Insert_Template" document must be saved for the data to register. However, do not close the template after populating.** The template must be left opened for the entire Bulk Upload Process.*
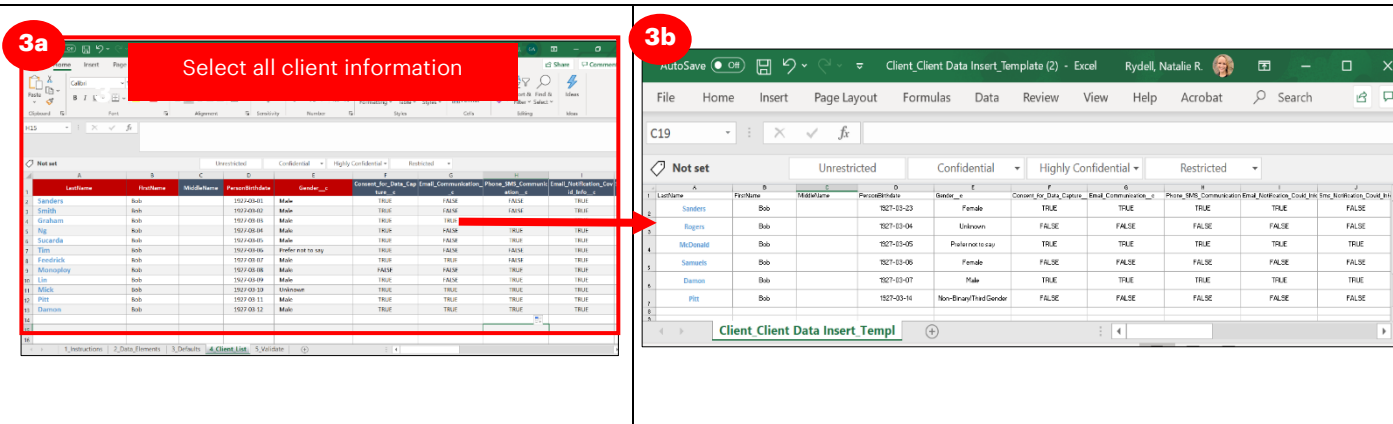
How:
1. Open the downloaded CSV template on your desktop.
2. Open the "**CLIENTS_LOAD_TEMPLATE**" file that is populated with the client information (from Section 1: **"Populate the MOH Provided Clients Load Template**" above) required for this upload.
3a. Copy the client data from the "**CLIENTS_LOAD_TEMPLATE**" file from the "**4_Client_List**" tab by selecting all rows and columns
3b. Paste this information into the CSV template, in the rows below the header. ***Note: Ensure you do not paste the data as 'special values' or 'text'.***
4. Clear all cells with "O" values and ensure they are left blank. Empty cells on the "**CLIENTS_LOAD_TEMPLATE**" file may paste with "**O**" values into the CSV template. Highlight and right click on these cells and select "**Clear Contents**".
5. Once the client data is copied, save the data and keep the CVS file open (closing the file will cause error during upload)

Further Context

- **Keep the CSV template open.** If you close it, the formatting of certain fields will change, and the system will produce errors upon uploading
- For birth dates, ensure you are always using the "**YYYY-MM-DD**" format. This is the only format that COVax_{ON} will accept. If the CSV template is accidentally saved and closed, excel will incorrectly change the format of the birth date to be MM-DD-YYYY. If this occurs, you can copy and paste the client data from
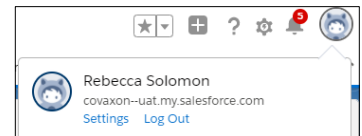
the "**CLIENTS_LOAD_TEMPLATE**" into the CSV template and save it again without closing it. Or, you can follow the below steps to change the format of the date in the CSV template to "**YYYY-MM-DD**" format:

1. Select cells within the "**Person Birthdate**" column that you would like to change
2. Right click and open the "**Format Cells**" function
3. From the left-hand side, select the "**Date**" category
4. From the Type list, choose the format "**YYYY-MM-DD**". Click "**OK**".

   Note: *If you cannot find the "**YYYY-MM-DD**" format, you can use the "**Custom**" category to create your "YYYY-MM-DD" format*

5. Save once more without closing the CSV template to register the changes
6. Go back to the upload tool and re-upload the file

- For a successful upload, ensure proper User Profile Settings. Click the icon in the top right-hand corner of the screen and click "**Settings**." Within settings, on the left-hand side of the screen select "**Advanced User Details**." Ensure the following information is populated correctly: Locale must be set to "**English (Canada**)", the proper Authorized Organization must be listed, and the User Profile must be "**Site Super User**"

2.3 Upload Populated Client Data Insert Template

Description:
Once the details for the new clients have been populated in the CSV template, follow these steps to upload this file into COVax_{ON}. <mark>Please keep in mind that the upload functionality is ONLY for creation of new clients and not modifying existing clients.</mark>

How:

1. From the Mass DataLoads page where you left off, read through the instructions, and if you agree and understand, click the checkbox "**I Agree that I read and understand the above instructions"**
2. Additional details will load below
3. Scroll down to the "**Upload File**" section.
4. Click the "**Choose File**" button
5. Locate the saved CSV template from the download folder in your computer, (the file should still be open). Select the file. Click "**Open**"
6. The file will load into COVax_{ON}
7. Click the "**Submit**" button to complete submission, or "**Cancel**" to end the process
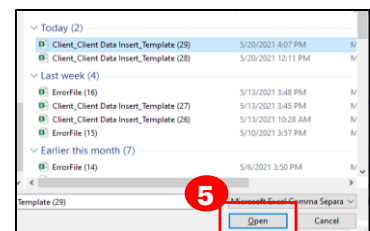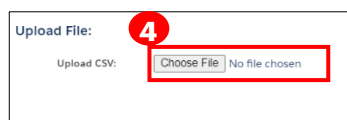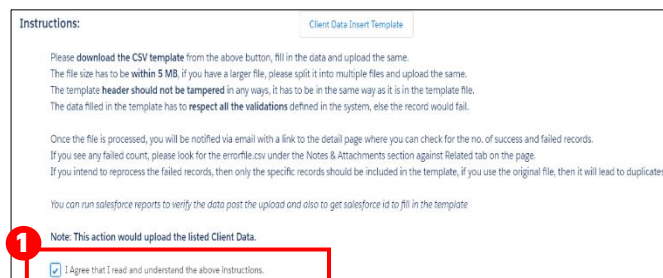
8. Click "**Ok**" on the pop-up window to process the file or if you want to go back to the previous step click "**Cancel**" button on the pop-up window

You will land on the results page of the upload, in the "**Details**" tab, which will show how many records were successful and failed. If a number is displayed next to the "No. of Failed Records" row, proceed to Section 3: "**Resolve Errors**" to resolve errors.
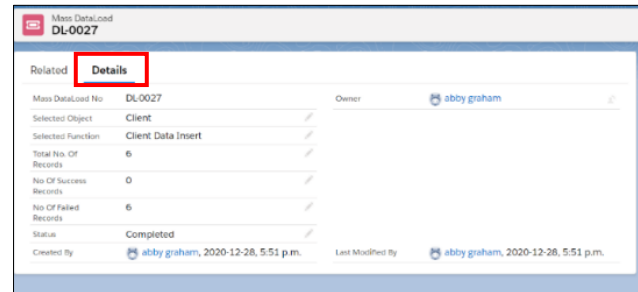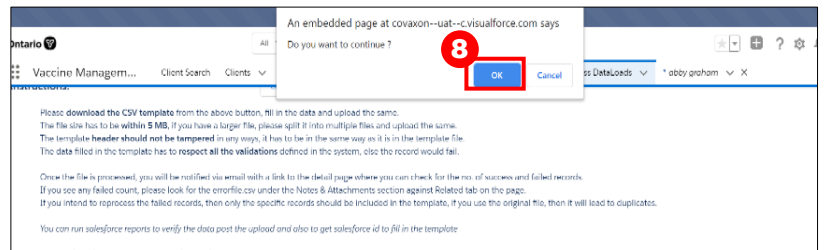
Further Context

- There is one character that is not contained within the COVax_{ON} character set (**œ**). If this character is included in the upload, COVax_{ON} will convert it to a � symbol. This can be resolved manually by updating the client record, or by separating this character to an "o" "e" in the upload file to avoid it resulting in a � symbol.
- If a duplicate client record is detected while performing a bulk client upload, then the record will be rejected from the upload. View rejected clients from the "**Error File**" in the "**Related**" tab of the Mass DataLoads record. There are cases where it is not a true duplicate. For example, two residents of a Long-Term Care Home with the same name (exact/approximate match) and the same postal code. **However, it is highly encouraged to capture the health card number to distinguish the two clients.** If the client does not have an HCN, COVax_{ON} users can bypass duplicate logic and create the client manually.
- The duplicate logic is as follows:
  - A. Exact match of health card number, **OR**
  - B. Name match on 2 or more of First Name (exact or fuzzy) and Last Name (exact or fuzzy), and **ONE OF**:
    - Date of Birth (exact match)
    - Postal Code (exact match)
    - Phone number for phone type (home, work, mobile, other) (exact match)
      - Note: the phone number **and the phone type** must match (will not cross references across different types)

Note: A fuzzy match means that the name is similar, but not exact. For example, short forms of names such as "Matt" instead of "Matthew". Although, fuzzy matches for French names will not be detected.

3. Resolve Errors

Description:
If there is a number of failed records on the "**Details**" tab, follow the below steps to resolve the errors.

1. Navigate to the "**Related**" tab and select the error file link "**ErrorFile.csv**" which downloads onto your computer.
2. Open the downloaded error file
3. Scroll to the right of the CSV template to view the error (far right column).
4. Identify the source of the error and which entries it applies to
5. Reference the "**CLIENTS_LOAD_TEMPLATE**" and resolve the impacted fields.
6. Copy the resolved rows that initially failed from the "**Client Data Insert Template**" into a new CSV template for upload, (repeating **sections 3 & 4 above**) to properly upload the remaining client entries.
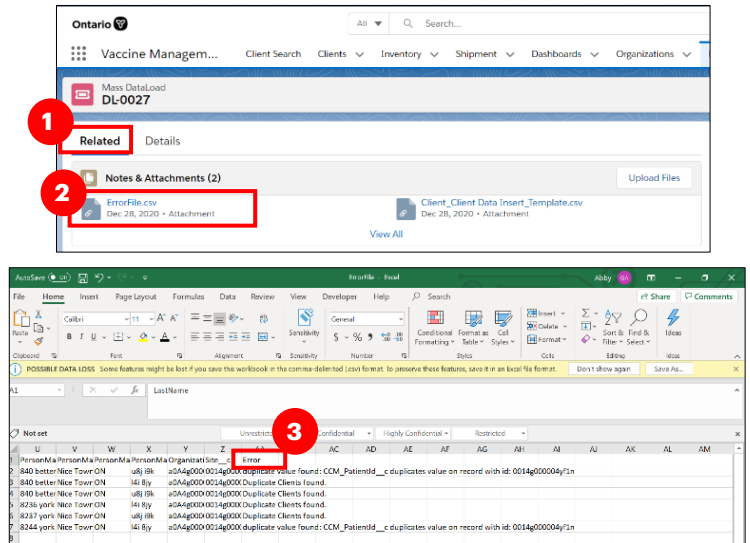
The common errors that may arise include:
- **"Duplicate Clients found"**: this error means that the client already exists within COVax_ON (duplicate logic rules can be found in Section 3: "**Resolve Errors**" above)
- **"Duplicate Value Found"**: CCM_PatientID: this error means that a client with the same health card number already exists within COVax_ON
- **"Invalid date: 9/27/1992"**: this error means that the format of the "**PersonBirthdate**" cell was in an incorrect format. As mentioned in Section 2.2 "**Populate Client Data Insert Template**", the correct format for birthdates is "**YYYY-MM-DD**."
- **"Please provide Gender and/or Birthdate:"** This error means that the birthdate field has been left blank. Each client must have a listed birthdate to be uploaded into COVax_ON
- **"Please enter valid Mailing/Postal Code":** This error means that "**O**" values were included in the CSV template upload, within the "**PersonMailingPostalCode**" or "**PersonMailingStreet**" columns. Refer to Section 2.2 "**Populate Client Data Insert Template**" above for mitigating this error
- An error may occur if a **"** (quotation mark) is hidden in the Client Load Template. To remedy, download a new version of the Client Load template from the MOH SharePoint.