

## Bulk Client Upload

Prepare and upload new client data into COVaxON using the bulk client upload functionality.

### Profiles

Site Super User, or users with 'Mass Data Load' permission

### Activities

This job aid covers the following key sections. **Click the relevant link:**

#	Section	Description
1.	<a href="#">Populate the MOH Provided Clients Load Template</a>	Populate client data in the MOH CLIENTS_LOAD_TEMPLATE
2.	<a href="#">Upload Clients into COVaxON</a>	a. Create a new mass data load item b. Populate the Client_Client Data Insert_Template c. Upload the populated CLIENTS_LOAD_TEMPLATE
3.	<a href="#">Resolve Errors</a>	If an error occurred and certain client records are not uploaded, follow the error resolution steps.

### Important Note

Users will no longer have access to the mass data load function in COVaxON. The **Mass Data Load** tab will no longer be visible to users with mass data load privileges to bulk upload clients in COVaxON. If users require this functionality, they can submit a request through their organization and send it to [covaxonsupport@ontario.ca](mailto:covaxonsupport@ontario.ca).

### Additional Information

- All site super users can perform mass data uploads. If you are not a site super user, a permission set called 'Mass Data Load' can be added to any user profile type for COVaxON (site staff, vaccinator, clinic coordinator, PCP vaccinator, or inventory manager). Adding this permission will enable access to the client mass data upload functionality and will also allow users to create and edit records. To request this permission set to be added, contact the ITS service desk. This permission set will be granted to non-site super users on a temporary and as-needed basis. Once the mass data upload exercise is completed, the permission set should be removed from the user's profile and only provided again if another upload is required.
- Refer to the **00 – Introduction to COVaxON and User Setup** 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 **03 – Search, Create and Maintain Client** job aid to learn how to create new individual clients in COVaxON.

## Disclaimer

**Data Privacy:** Users with access to COVaxON 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 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.** COVaxON 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.

## 1. Populate the MOH Provided CLIENTS\_LOAD\_TEMPLATE

**Description:** The Ministry of Health (MOH) has provided a template called the CLIENTS\_LOAD\_TEMPLATE to assist with a bulk client upload. Follow the instructions below 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 MOH SharePoint. Check with your site lead for details regarding how to access the MOH SharePoint site.

Please note these important considerations when populating the CLIENTS\_LOAD\_TEMPLATE:

Tab	Important Notes
1_Instructions	<ul style="list-style-type: none"> <li>Review and utilize the instructions on this tab to populate the rest of the template</li> </ul>
2_Data_Elements	<ul style="list-style-type: none"> <li>Review tab to understand the data you are collecting</li> <li>Red fields are mandatory – if they are not populated accurately on tab 4_Client_List, the upload will be unsuccessful</li> </ul>
3_Defaults	<ul style="list-style-type: none"> <li>The fields populated on this tab will auto populate the related fields on the 4_Client_List tab</li> <li>The column <b>Vaccination Event #</b> allows users to allocate a list of clients to a specific vaccination event (VE)</li> <li>This number is populated on the vaccination event record in COVaxON when creating a new record</li> <li>The user can copy and paste the VE number from the VE record in COVaxON into the proper cell for the upload</li> </ul>

Tab	Important Notes
4_Client_List	<ul style="list-style-type: none"> <li>Populate information for the clients you want to upload into COVaxON here</li> <li>For field requirements for each column, click on the heading to view additional details</li> <li>For birth dates, ensure you are always using the 'YYYY-MM-DD' format – this is a mandatory field and the only format the system will accept (see further details in section 3 (Resolve Error) of this document)</li> <li>Postal codes must be entered in the format 'A1A 1A1' (no dashes, space in the middle)</li> <li>If the <b>Reason for Immunization</b> field is populated with a value from Congregate Living, Long Term Care, or Retirement Home, the <b>Institution</b> field will become mandatory. For these <b>Reason for Immunization</b> options, if an <b>Institution</b> is not populated, the user will receive an upload error. For all other <b>Reason for Immunization</b> values, the <b>Institution</b> field is optional.</li> </ul>
5_Validate	<ul style="list-style-type: none"> <li>Use this tab to review the results of your data entry.</li> <li>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.</li> </ul>
6_Invalid_HCNs	<ul style="list-style-type: none"> <li>Use this tab to review if any clients are being uploaded with an invalid health card number (HCN) or without an HCN</li> <li>This will allow users to ensure the accuracy of their template data</li> </ul>
7_Change_Log	<ul style="list-style-type: none"> <li>Review recent changes to this template</li> <li>The template is updated frequently – download a new version of this template from the MOH SharePoint site each time you want to perform a client upload</li> </ul>

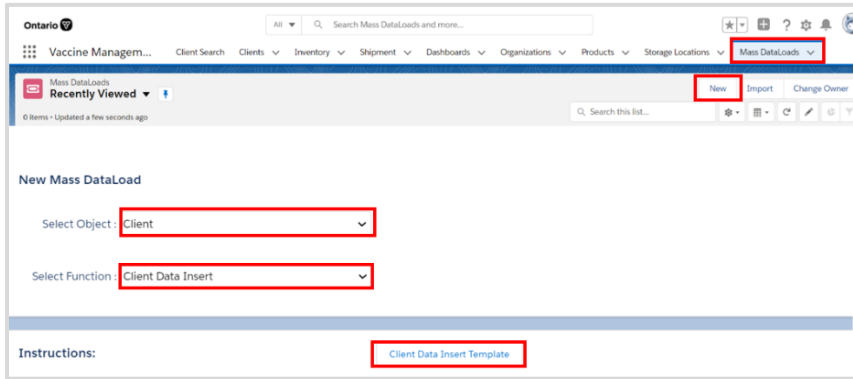
## 2. Upload Clients into COVaxON

**Description:** To create a new mass data load record in COVaxON, use the following three (3) steps:

- Create a new mass data load item** – create a new mass data load item in COVaxON and download the template
- Populate the Client\_Client Data Insert\_Template** – copy the client data from the CLIENTS\_LOAD\_TEMPLATE into the downloaded Client\_Client Data Insert\_Template from COVaxON
- Upload populated Client\_Client Data Insert\_Template** – once the Client\_Client Data Insert\_Template is populated with the copied client data, save the document, and then upload back into COVaxON

## A. Create a New Mass Data Load Item

**Description:** When adding new clients into COVaxON, follow these steps to create a new mass data load item, and download the Client\_Client Data Insert\_Template.



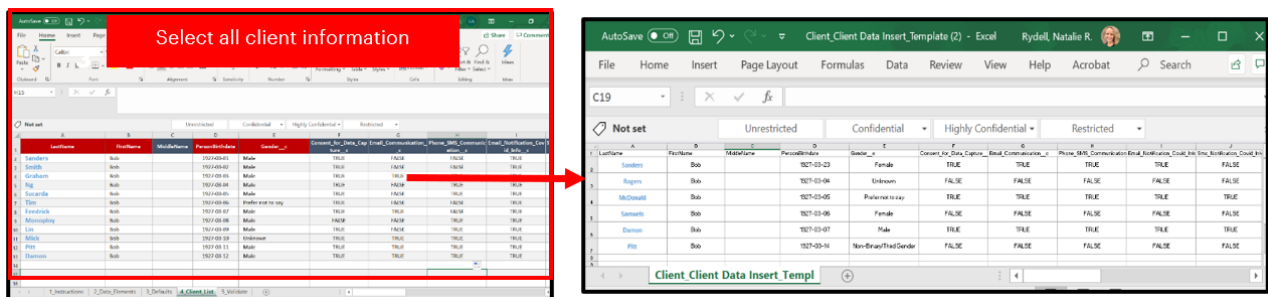
1. In COVaxON, click the **Mass DataLoads** tab.
2. Click **New** from the right corner.
3. From the **Select Object** dropdown, select 'Client'.
4. From the **Select Function** dropdown, select 'Client Data Insert'.
5. To download the .csv template, click **Client Data Insert Template**. The document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

## B. Populate the Client\_Client Data Insert\_Template

**Description:** Once the Client\_Client Data Insert\_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 COVaxON.

Copy and paste fields using **Ctrl+C** (copy) and **Ctrl+V** (paste) functions. **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 must be saved for the data to register. However, **do not close the template after populating**. The template must be left open for the entire bulk upload process.



1. Open the downloaded .csv template on your desktop.
2. Open the CLIENTS\_LOAD\_TEMPLATE file that is populated with the client information required for this upload from section 1 ([Populate the MOH Provided CLIENTS\\_LOAD\\_TEMPLATE](#)) above.
3. Copy the client data from the CLIENTS\_LOAD\_TEMPLATE file from the **4\_Client\_List** tab by selecting all rows and columns.
4. 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.
5. Clear all cells with '0' values and ensure they are left blank. Empty cells on the CLIENTS\_LOAD\_TEMPLATE file may paste with '0' values into the .csv template. Highlight and right click on these cells and select 'Clear Contents'.

**Note:** No additional information should be changed/added on the Client\_Client Data Insert\_Template. If information is added/changed, the client may not be successfully uploaded into COVaxON.

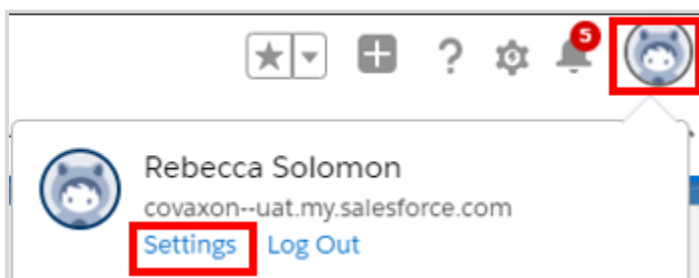
6. Once the client data is copied, save the data and keep the .csv file open (closing the file will cause an error during upload).

## 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 COVaxON 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 steps below to change the format of the date in the .csv template to YYYY-MM-DD:
  1. Select the 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 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 own YYYY-MM-DD format.

  5. **Save** once more without closing the .csv template to register the changes.
  6. Go back to the upload file and re-upload the file.
- For a successful upload, ensure proper user profile settings. Click the **icon** in the top right corner of the screen and click **Settings**.



- Within settings, on the left side of the screen, select **Advanced User Details**. Ensure the following information is populated correctly:
  - **Locale** – must be set to ‘English (Canada)’
  - **Authorized Organization** – the proper AO must be listed
  - **User Profile** – must be ‘Site Super User’ or the ‘Mass Data Load’ permission must be tagged to the user’s profile

## C. Upload Populated Client\_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 COVaxON. Please keep in mind that the upload functionality is *only* for creation of new clients and not for modifying existing clients.

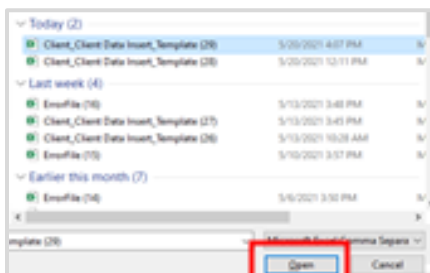
1. From the **Mass DataLoads** page where you left off, read through the instructions and, if you agree and understand, check the checkbox **I Agree that I read and understand the above instructions**.



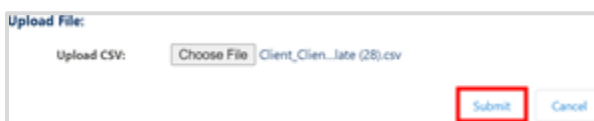
2. Additional details will load below.
3. Scroll down to the *Upload File* section. Click **Choose File**.



4. Locate the saved .csv template from the download folder in your computer (the file should still be open). Select the file and click **Open**.



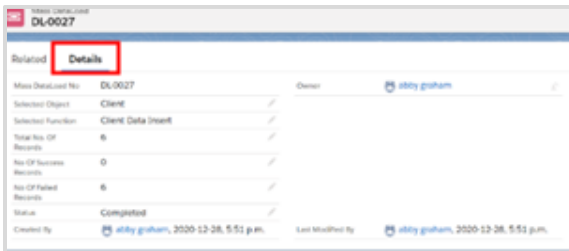
5. The file will load into COVaxON. Click **Submit** to complete the submission, or **Cancel** to end the process.



- Click **OK** on the popup window to process the file or, if you want to go back to the previous step, click **Cancel** on the popup window.



- You will land on the results page of the upload, in the **Details** tab, which will show how many records were successful or failed.



**Note:** When mass uploading client records, the upload speed will take some time to move from ‘Submitted’ to ‘In Progress’ to ‘Complete’ statuses. Users can monitor the progress by refreshing the upload page and monitoring the status. If a number is displayed next to the ‘No. of Failed Records’ row, proceed to section 3 ([Resolve Errors](#)).

## Further Context

- There is one character that is not contained with the COVaxON character set (œ). If this character is included in the upload, COVaxON will convert it to a ❖ symbol. This can be resolved manually by updating the client record, or by separating the character to an ‘o’ and an ‘e’ (oe) 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 (HCN) to distinguish the two clients.** If the client does not have an HCN, COVaxON users can bypass duplicate logic and create the client manually.
- The duplicate logic is as follows:
  - Exact match of HCN, **OR**
  - 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)

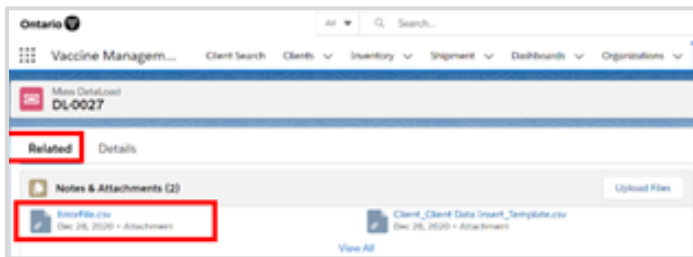
**Note:** The phone number *and* the phone type must match (the system will not cross reference across different phone types).

**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’. However, fuzzy matches for French names will not be detected.

## 3. Resolve Errors

**Description:** If there are one or more failed records on the **Details** tab, follow the steps below 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\_Client Data Insert\_Template into a new .csv template for upload (repeating sections 3 and 4 above) to properly upload the remaining client entries.

The common errors that may arise include:

Error	Description
Duplicate Clients Found	This error means that the client already exists within COVaxON (duplicate logic rules can be found in section 3 ( <a href="#">Resolve Errors</a> ) above).
Duplicate Value Found	CCM_PatientID – this error means that a client with the same health card number already exists within COVaxON.
Invalid date: 9/27/1992	This error means that the format of the <b>PersonBirthdate</b> cell was in an incorrect format. As mentioned in section 2b (Populate Client_Client Data Insert_Template), the correct format for birthdates is YYYY-MM-DD.



Error	Description
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 COVaxON.
Invalid Postal Code	Postal codes must be entered in the format 'A1A 1A1' (no dashes, space in the middle). If the client's postal code is not entered in this format, this error will occur.
Please enter valid Mailing/Postal Code	This error means that '0' values were included in the .csv template upload, within the <b>PersonMailingPostalCode</b> or <b>PersonMailingStreet</b> columns. Refer to section 2b (Populate Client_Client Data Insert_Template) above for mitigating this error.
Reason for Immunization: bad value for restricted picklist field: [value]	These error messages mean that either a <b>Reason for Immunization</b> value was added to the Client_Client Data Insert_Template that was not one of the options from the dropdown on the CLIENTS_LOAD_TEMPLATE, or a <b>Reason for Immunization</b> value was selected in the CLIENTS_LOAD_TEMPLATE that is no longer an option in COVaxON. See section 2b for further context.
Bad value for restricted picklist field: [reason]	

- An error may occur if a " (quotation mark) is hidden in the CLIENTS\_LOAD\_TEMPLATE. To remedy, download the latest version of the CLIENTS\_LOAD\_TEMPLATE from the MOH SharePoint site.
- An error may occur if 'Alternative ID – Other' selected and the **Other Alternative ID – Please specify** field is blank.