

COVaxON Mass Data Upload Job Aid

Target Role: COVax Site Super User

Activity Description:

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

Permission Level: COVax Site Super User

- Access Client Search
- Edit-Access for Client Profile
- Administer Dose Capability
- Edit-Access for Shipment, Inventory, Products
- Mass upload client lists
- Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report

User Access with new AO & VE functionality:

There are no restrictions to uploading clients or modifying client records based on the VE on the client record.

Your profile has a defined access level and is associated with an Authorized Organization, which means you can perform the above activities within COVaxON on behalf of that Authorized Organization (AO). For further details on setting up your profile, refer to the "Login, Logout, and User Settings" job aid.

This job aid outlines the instructions on how to load prepared client data into the COVaxON system. For instructions on how to prepare this client data prior to using this job aid, please refer to the "1_Instructions" tab of the CLIENTS_LOAD_TEMPLATE. This template is used to prepare client data in alignment with the format requirements for a successful upload into COVaxON

Data Privacy Disclaimer:

Users with access to COVaxON can see the demographic details and health numbers 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.

The system records detailed audit transaction logs that inform the Ministry of Health 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.

High-Level Mass Data Upload Process

				
1. Populate the MOH Provided Clients Load Template	2. Creating a New Mass Data Load Item	3. Populate the Client Data Template	4. Upload Populated Client Data Template	5. Resolving Errors
Populate the client data in the MOH "CLIENTS_LOAD_TEMPLATE" by following the instructions in the "1_Instructions" tab	Create a new Mass Data Load item in the COVaxON system and download the template	Copy the client data from the "CLIENTS_LOAD_TEMPLATE" into the downloaded template from COVaxON	Once the template contains the copied client data, save it and upload the template back into COVaxON	If an error occurred and certain records are not uploaded, follow the error resolution steps

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1. Populate the MOH Provided Client Loads Template

Description:

In order to complete a bulk client upload in the system, the Ministry of Health has provided Users with a template called "CLIENTS_LOAD_TEMPLATE". 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.

Key Tips:

- The "CLIENTS_LOAD_TEMPLATE" must be populated according to the instructions stated on the first tab "1_Instructions". Please note some important considerations:
 - Red fields shown on the "2_Data_Elements" and "4_Client_List" tabs indicate that they are mandatory client fields to be populated. If these are not populated accurately, the upload will be unsuccessful.
 - Review the "2_Data_Elements" tab to understand the data you are collecting
 - The fields populated in the "3_Defaults" tab will auto populate the related fields on the "4_Client_List" tab
 - A column was added to the CLIENT_LOAD_TEMPLATE "Vaccination Event#" to allow Super Users to upload a list of clients to a Vaccination Event. This number is populated on the Vaccination Event record in COVaxON upon creating a new record. The User can copy and paste the Vaccination Event # from the VE record in COVaxON into the column for the upload.
 - For birth dates in the "4_Client_List" tab, ensure you are always using the YYYY-MM-DD format. This is the only format that the COVaxON system will accept. See further details on this in the related steps in this document. This is a mandatory field.
 - For field requirements for each column in the "4_Client_List" tab, you can click on the heading to view the embedded pop-up
 - Use the "5_Validate" tab to review the results of your data entry. This tab will highlight if there are any missing field entries and will allow Users to ensure accuracy of their template upload
 - The CLIENT_LOAD_TEMPLATE has been updated with an "Institution" column. If this field is entered for clients during a mass data upload, the institution field on the client profile will be updated. The Institution field is a look up to a list of Institutions within COVaxON. This field should be populated in the below cases: LTCH/RH Residents
 - LTCH/RH Residents
 - LTCH/RH Staff
 - Congregate Setting Residents
 - Congregate Setting Staff



2. Creating a New Mass Data Load Item

Description:

When adding new clients into the COVaxON system, follow these steps to create a new mass data load item, and download the system compatible upload template.

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The screenshot shows the COVaxON web application interface. At the top, there is a navigation bar with the 'Ontario' logo and a search bar. Below this is a menu bar with various options like 'Vaccine Management...', 'Client Search', 'Clients', 'Inventory', 'Shipment', 'Dashboards', 'Organizations', 'Products', 'Storage Locations', and 'Mass DataLoads'. The 'Mass DataLoads' tab is highlighted. Below the menu bar, there is a section titled 'Mass DataLoads' with a 'Recently Viewed' dropdown and a 'New' button. The 'New' button is highlighted with a red box and a red circle with the number 2. Below this, there is a 'New Mass DataLoad' section with two dropdown menus: 'Select Object' and 'Select Function'. The 'Select Object' dropdown is set to 'Client' and the 'Select Function' dropdown is set to 'Client Data Insert'. Both dropdowns are highlighted with red boxes and red circles with the numbers 3 and 4 respectively. Below these dropdowns, there is a blue bar with a red circle with the number 7 and a button labeled 'Client Data Insert Template'. Below this bar, there is an 'Instructions:' section with several paragraphs of text. At the bottom of the instructions, there is a checkbox labeled 'I Agree that I read and understand the above instructions.' which is highlighted with a red box and a red circle with the number 5. Below the checkbox, there is a 'How:' section with a list of steps.

New Mass DataLoad

Select Object: Client

Select Function: Client Data Insert

Instructions:

[Client Data Insert Template](#)

Please **download the CSV template** from the above button, fill in the data and upload the same.
The file size has to be **within 5 MB**, if you have a larger file, please split it into multiple files and upload the same.
The template **header should not be tampered** in any ways, it has to be in the same way as it is in the template file.
The data filled in the template has to **respect all the validations** defined in the system, else the record would fail.

Once the file is processed, you will be notified via email with a link to the detail page where you can check for the no. of success and failed records.
If you see any failed count, please look for the errorfile.csv under the Notes & Attachments section against Related tab on the page.
If you intend to reprocess the failed records, then only the specific records should be included in the template, if you use the original file, then it will lead to duplicates.

You can run salesforce reports to verify the data post the upload and also to get salesforce id to fill in the template

Note: This action would upload the listed Client Data.

☒ I Agree that I read and understand the above instructions.

How:

1. In COVaxON, select the “**Mass DataLoads**” tab
2. Select “**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. Read through the instructions, and if you agree and understand, select the checkbox “**I Agree that I read and understand the above instructions**”
6. Additional details will load below.
7. To download the CSV template, select, “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.

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3. Populate Client Data Template

Description:

Once the CSV template file downloads, populate it using the "CLIENTS_LOAD_TEMPLATE" according to the following steps to ensure you have accurately captured the data for new clients to be created in COVaxON.

Copy and Paste Fields

Control C + Control V

Do not paste as special values or text as the format will change and the file won't be accepted

Note: The "Client_Client Data Insert_Template" document must be saved for the data to register, but should not be exited.

The top spreadsheet, 'CLIENTS_LOAD_TEMPLATE_v8', displays a table with the following data:

	LastName	FirstName	MiddleName	PersonBirthdate	Gender_c	Consent_for_Data_Cap	Email_Communication	Phone_SMS_Communic	Email_Notification_Cov
1	Sanders	Bob		1927-03-01	Male	TRUE	FALSE	FALSE	TRUE
2	Smith	Bob		1927-03-02	Male	TRUE	FALSE	FALSE	TRUE
3	Graham	Bob		1927-03-03	Male	TRUE	TRUE	TRUE	TRUE
4	Hig	Bob		1927-03-04	Male	TRUE	FALSE	TRUE	TRUE
5	Sucarda	Bob		1927-03-05	Male	TRUE	FALSE	FALSE	TRUE
6	Tim	Bob		1927-03-06	Prefer not to say	TRUE	FALSE	FALSE	TRUE
7	Feedrick	Bob		1927-03-07	Male	TRUE	TRUE	FALSE	TRUE
8	Monoploy	Bob		1927-03-08	Male	FALSE	FALSE	TRUE	TRUE
9	Lin	Bob		1927-03-09	Male	TRUE	FALSE	TRUE	TRUE
10	Mick	Bob		1927-03-10	Unknown	TRUE	TRUE	TRUE	TRUE
11	Pitt	Bob		1927-03-11	Male	TRUE	TRUE	TRUE	TRUE
12	Damon	Bob		1927-03-12	Male	TRUE	TRUE	TRUE	TRUE

The bottom spreadsheet, 'Client_Client Data Insert_Template (2)', displays a table with the following data:

	LastName	FirstName	MiddleName	PersonBirthdate	Gender_c	Consent_for_Data_Cap	Email_Communication	Phone_SMS_Communic	Email_Notification_Covid	Sms_Notification_Covid
1	Sanders	Bob		1927-03-23	Female	TRUE	TRUE	TRUE	TRUE	FALSE
2	Rogers	Bob		1927-03-04	Unknown	FALSE	FALSE	FALSE	FALSE	FALSE
3	McDonald	Bob		1927-03-05	Prefer not to say	TRUE	TRUE	TRUE	TRUE	TRUE
4	Samuels	Bob		1927-03-06	Female	FALSE	FALSE	FALSE	FALSE	FALSE
5	Damon	Bob		1927-03-07	Male	TRUE	TRUE	TRUE	TRUE	TRUE
6	Pitt	Bob		1927-03-14	Non-Binary/Third Gender	FALSE	FALSE	FALSE	FALSE	FALSE

How:

1. Open the downloaded CSV file on your desktop.
2. Open the "CLIENTS_LOAD_TEMPLATE" file that is populated with the client information required for this upload.
3. Copy the client data from the "CLIENTS_LOAD_TEMPLATE" file from the "4_Client_List" tab by selecting all rows and columns and paste it into the rows below the header of the CSV file you just downloaded and saved.

Note: Ensure you do not paste the data as 'special values' or 'text'.

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

Key Tips

- Ensure to keep the CSV file 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 the COVaxON system will accept. If the CSV file 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

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the "CLIENTS_LOAD_TEMPLATE" into the CSV and save it again without closing it. Or, you can follow the below steps to change the format of the date in the CSV 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". Select "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 "Client_Client Data Insert_Template" to register the changes
 6. Go back to the upload tool and re-upload the file
- For a successful upload, the locale on your User profile must be set to "English (Canada)". Refer to section 2 above for checking and updating your User profile settings.
 - Previously the client upload tool required a date of birth for the upload to be successful. This restriction has been removed. The upload no longer requires the date of birth to be entered (though it is a highly encouraged field)



4. Upload Populated Client Data Template

Description:

Once the details for the new clients have been populated in the downloaded 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 modifying existing clients.**

How:

1. From the Mass DataLoads page where you left off, go to the "Upload File" section.
2. Select the "Choose File" button
3. Locate the saved CSV file from your computer, (the file should still be open). Select the file.
4. The file will load into the COVaxON system.
5. Select "Submit" button to complete submission, or "Cancel" to end the process
6. 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 or failed. If a number is displayed next to the "No. of Failed

Upload File:

Upload CSV: No file chosen

Upload File:

Upload CSV: Client_Client_Template.csv

An embedded page at covaxon-uat-xxxxxxxxxxxxx.com says

Do you want to continue ?

Please download the CSV template from the above button, fill in the data and upload the same.
The file size has to be within 5 MB. If you have a larger file, please split it into multiple files and upload the same.
The template header should not be tampered in any way. It has to be in the same way as it is in the template file.
The data filled in the template has to respect all the validations defined in the system, else the record would fail.
Once the file is processed, you will be notified via email with a link to the detail page where you can check for the no. of success and failed records.
If you see any failed count, please look for the errorfile.csv under the Notes & Attachments section against Related tab on the page.
If you intend to reprocess the failed records, then only the specific records should be included in the template, if you use the original file, then it will lead to duplicates.
You can run salesforce reports to verify the data post the upload and also to get salesforce id to fill in the template.

Mass DataLoad
DL-0027

Related **Details**

Mass DataLoad No	DL-0027	Owner	abby graham
Selected Object	Client		
Selected Function	Client Data Insert		
Total No. Of Records	6		
No Of Success Records	0		
No Of Failed Records	6		
Status	Completed		
Created By	abby graham, 2020-12-28, 5:51 p.m.	Last Modified By	abby graham, 2020-12-28, 5:51 p.m.

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Records” row, proceed to section 6 to resolve errors.

Key Tips

- Previously on rare occasions, users could run into an error whereby the status of the upload would result in “Submitted” instead of “Completed”, which meant that the upload was not successful. The workaround was to convert the CSV to a UTF-8 format. This workaround is not longer necessary as the COVaxON system will accept **the CSV file** regardless of the encoding format. Special characters (such as French characters), will no longer cause this issue and will be accepted as well. However, there is one character that is not contained within 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 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 mass data load, then the record will be rejected from the upload and they will be able to view the error in 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 rare instance that is not possible, the work around is that a Site Staff/Vaccinator User at that same location can 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.

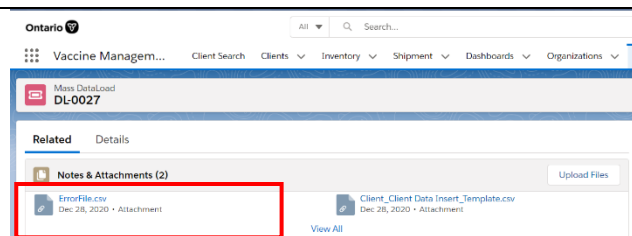


5. Resolving Errors

Description:

If there is a number of failed records on the “**Details**” tab, follow the below steps to resolve the errors

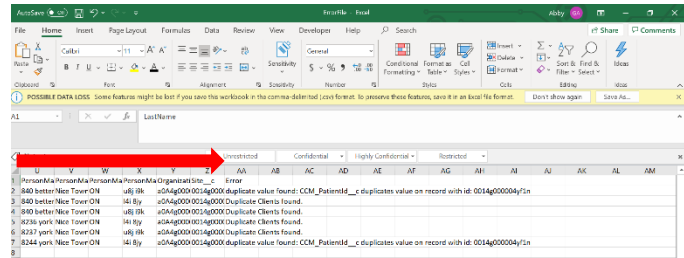
1. Navigate to the “**Related**” tab and select the error file link “ErrorFile.csv” which downloads it onto your computer.
2. Open the downloaded error file and scroll to the right of the CSV to view the error (far right column)
3. Identify the source of the error and which entries it applies to
4. Reference the “CLIENTS_LOAD_TEMPLATE” and resolve the impacted fields.



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5. Copy the resolved rows that initially failed from the “Client Data Insert Template” into a new CSV file for upload, (repeating **sections 4 & 5 above**) to properly upload the remaining client entries



POSSIBLE DATA LOSS: Some features might be lost if you save the workbook in the comma-separated load format. To preserve these features, save it in an Excel file format. Don't show again Save As...

	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM
1	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa	PersonMa
2	840	better	Nice	Town	ON	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k
3	840	better	Nice	Town	ON	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k
4	840	better	Nice	Town	ON	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k
5	8234	York	Nice	Town	ON	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k
6	8237	York	Nice	Town	ON	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k
7	8244	York	Nice	Town	ON	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k	u8j	8k

The common errors that may arise include:

- **“Duplicate Clients found”**: this error means that the client already exists within COVaxON (duplicate logic can be found in the Section 5: Further Context above)
- **“Duplicate Value Found”**: CCM_PatientID: this error means that a client with that health card number already exists within COVaxON
- **“Invalid date: 9/27/1992”**: this error means that the format of the “PersonBirthdate” cell was in the incorrect format. Refer to the **section 4: “Populate Client Data Template”** above for mitigating this error.
- **“Insufficient access rights on cross-reference ID 0014c0XXXXXX”**, this indicates that the uploader’s Service Delivery Location does not align with the fields input into the “CLIENTS_LOAD_TEMPLATE”. You cannot insert records associated to a Service Delivery Location or Organization that is not consistent with your profile. To reconcile this, refer to **section 2: “Validate COVaxON User Profile”**. This outlines how to ensure the Service Delivery Location and Organization within COVaxON match the fields within the text in the “3_Defaults” tab.