

COVID-19 Vaccination Mass Client Upload Workflow



Excel, EMR & COVaxON

Quality Improvement in Primary Care Council
&



TELUS PSS:

Within your Raw Data Workbook:

1. Identify patients that have an appointment booked:
 - a. Query Export of Patient List:
 - i. [OMD Query](#) to export patients with a booked appointment within the providers' schedules.
 - ii. [Query developed by London FHT](#) to export patients with a booked appointment from a provider's schedule. Please see below for the query details:

Search Name: COVID - Appointment Schedule Patients not medway

Patient Status = Active
 and
 Containing..., appointment date is "What appointment date"
 and
 Next Appointment Provider does not contain Medway COVID vaccination schedule
 and
 Next Appointment Provider contains COVID Vaccination Schedule

Telus PSS Query

[Edit Search Criterion](#)

Demographics	HN Expiry Date	contains	COVID Vaccination Schedule
Patient Profile	HN Version Code	contains the word	<input type="checkbox"/> Ask When Run
Visits	Home Phone	does not contain the word	
Vitals	Language Code	does not contain	
Immunizations	Last Seen Date	is	
Treatment	Maiden Name	is not	
Allergies	Member Status	is empty	
CPP Problems	Middle Name	is not empty	
CPP Past Medical History	Mobile Phone	starts with	
CPP Family History	Next Appointment Date	ends with	
CPP Risk Factors	Next Appointment Provider		
Lab Values	Next of Kin		
Lab Text	Other Provider Name		
Diagnostic Imaging	Patient Number		
Diagnostic Test Reports	Patient Status		
Consultation Report	Patient Status Date		
Miscellaneous Letters	Postal Code		
Medical Report	Preferred Name		
Custom Forms	Primary Location		
Cohorts	Primary Provider Name		
Pending Tests/Consults	Province		
Bills	Province Code		
Appointments	Recall Date		
All Text Notes	Referring Physician Number		
Other	Registry Number		
Restrictions	Rostered		
Nested Search	Roster Enrolment Date		
Scoring	Roster Termination Date		
	Sex		
	Spoken Language		
	Street Address		
	Surname		

Telus PSS Query Criteria

COVID - Appointment Schedule Patients 1

Surname	First Name	BirthdateF...	Gender	Health Nu...	Home Phone	Mobile Phone	E-Mail	Street Add...	City Address	Postal Code
Public	John	1980/01/29	male		519-519-5191					

Include Privacy Column [Add Column...](#) [Remove Column](#)

Telus PSS Query Output Columns

Please note: It is highly encouraged that an appointment type is created for COVID-19 vaccinations in order to query them and streamline the process. The query above will only work if there is a specific appointment type for COVID-19 vaccinations.

2. Change the format of the data with some of the recommend Excel formulas below.
Ex) Dates to the required format to COVAX_{ON} (YYYY-MM-DD) and replace F/M to Female/Male.

Within the CLIENTS_LOAD_TEMPLATE (Excel Format):

3. From your raw data workbook, copy and paste the columns you need AS VALUES into the mass CLIENTS_LOAD_TEMPLATE Excel file and validate your data.

Please note: When pasting data, a common mistake is pasting data within the wrong columns, please double-check this before pasting.

Within the CLIENTS_LOAD_TEMPLATE (.csv Format):

4. Copy and paste from the mass CLIENTS_LOAD_TEMPLATE Excel file into the CLIENTS_LOAD_TEMPLATE.csv template obtained from COVAX_{ON}. Please ensure that you add the vaccination event # into column Y (from Covax_{ON}), as well as entering Reason for Immunization (column K) in the csv file (from Covax_{ON}).
5. Complete your upload and review any import errors.

ACCURO:

Within your Raw Data Workbook:

1. Pull data from EMR as needed.
2. Filter data as needed (birth year, postal codes, etc.).
3. Copy the headers from the CLIENTS_LOAD_TEMPLATE Excel file and paste them to the right of the raw data (including columns that are going to be blank).
4. For each column in the template, there is a formula to read from the raw data on the left and format the text as needed.
(**Please note:** Excel references are based on a sample export, as a result they may need to be altered).
5. Copy the formulas down for all patients in the list.

Within the CLIENTS_LOAD_TEMPLATE (Excel Format):

6. Select and copy the formulas on the right and paste into CLIENTS_LOAD_TEMPLATE Excel file AS VALUES. All the columns should line up perfectly including the ones that are left blank.

Within the CLIENTS_LOAD_TEMPLATE (.csv Format):

7. Copy and paste from the mass CLIENTS_LOAD_TEMPLATE Excel file into the CLIENTS_LOAD_TEMPLATE.csv file obtained from COVAX_{ON}. Please ensure that you add the vaccination event # into column Y (from Covax_{ON}), as well as entering Reason for Immunization (column K) in the .csv file (from Covax_{ON}).
8. Complete your upload and review any import errors.

EXCEL FORMULAS:

Please note: Excel formulas are an example from a sample output data set. The formulas may vary depending on your data output. Within the formulas all cell reference should be changed to the cell in reference, for example Last Name Cell may be C2 within your dataset.

Data Set Column Name	Excel Formula to Format for Upload
LastName	=IF(LastName Cell=0,"", LastName Cell)
FirstName	=IF(FirstName Cell=0,"", FirstName Cell)
MiddleName	=IF(MiddleName Cell =0,"",MiddleName Cell)
PersonBirthdate	=TEXT(PersonBirthdate Cell,"yyyy-mm-dd")
Gender__c	=IF(Gender Cell="M","Male",IF(Gender Cell ="F","Female",""))
CCM_PatientId__c	
Telus PSS	=RIGHT(SUBSTITUTE(PatientID Cell," ",""),10)
Accuro	=LEFT(PatientID Cell,10)
PersonHomePhone	
Telus PSS	=IF(PersonHomePhone Cell=0,"", PersonHomePhone Cell)
Accuro	=SUBSTITUTE(SUBSTITUTE(PersonHomePhone Cell,"(", ""),"", "-")
PersonMobilePhone	
Telus PSS	=IF(PersonMobilePhone Cell=0,"", PersonMobilePhone Cell)
Accuro	=SUBSTITUTE(SUBSTITUTE(PersonMobilePhone Cell,"(", ""),"", "-")
PersonMailingStreet	=IF(PersonMailingStreet Cell=0,"", PersonMailingStreet Cell)
PersonMailingCity	=IF(PersonMailingCity Cell=0,"", PersonMailingCity Cell)
PersonMailingState	=IF(PersonMailingState Cell=0,"", PersonMailingState Cell)
PersonMailingPostalCode	=IF(PersonMailingPostalCode Cell=0,"", PersonMailingPostalCode Cell) OR =UPPER(IF(LEN(PersonMailingPostalCode Cell)<7,(LEFT(PersonMailingPostalCode Cell, 3) & " " & RIGHT(PersonMailingPostalCode Cell, 3)), PersonMailingPostalCode Cell))