# HCS Patient Tracking: Export and Import Patient Records
# Job Aid

This Job Aid will walk you through step-by-step instructions on how to successfully export patients from and import patients into the HCS Patient Tracking system.

| How to... | |
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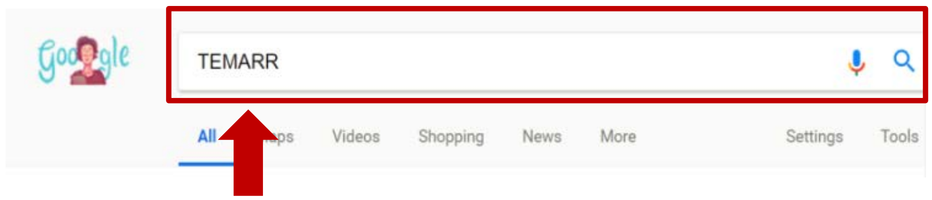
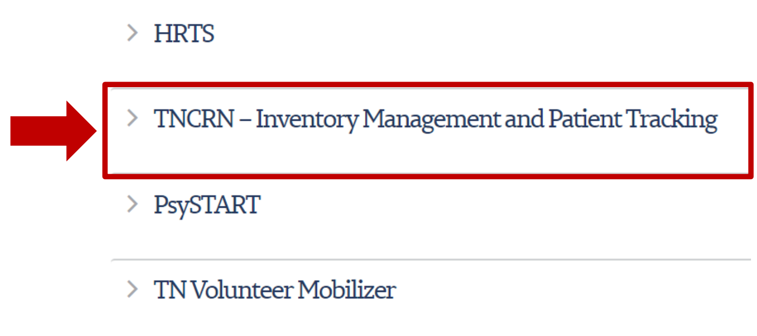
| **Steps** | **Screen** |
| **STEP 1:**<br>Open a **web browser** (e.g. Google Chrome, Internet Explorer, etc.), and enter TEMARR into the *search field.*<br><br>*Result: TEMARR –TN.gov should be first link listed in the results. Click on it, and you will be taken to the TEMARR home page. Alternatively, you may click [here.]* |  |
| **STEP 2:**<br>Scroll down **the page** and click on the **TNCRN - Inventory Management and Patient Tracking link.**<br><br>*Result: This section expands downward and reveals links to both the Inventory Management and HCS Patient Tracking systems.* |  |
| **STEP 3:**<br>Click on the **HCS Patient Tracking link.**<br><br>*Result: The login screen for the HCS Patient Tracking system displays.* |  |

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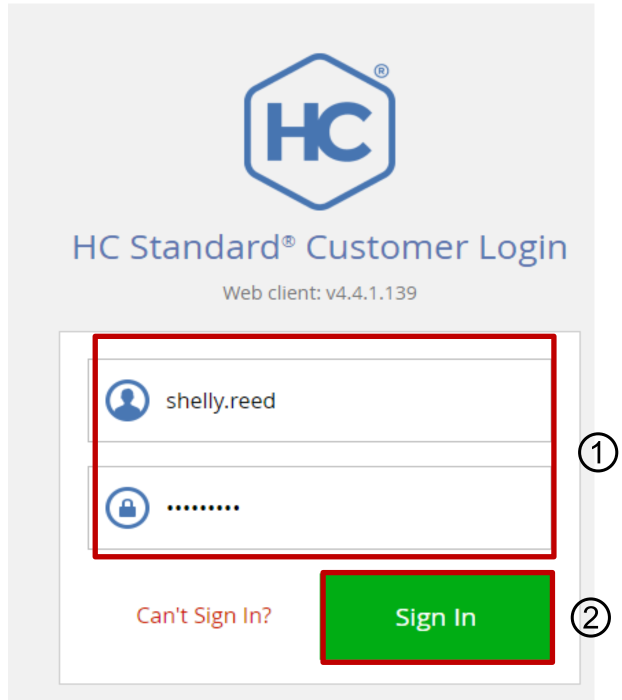
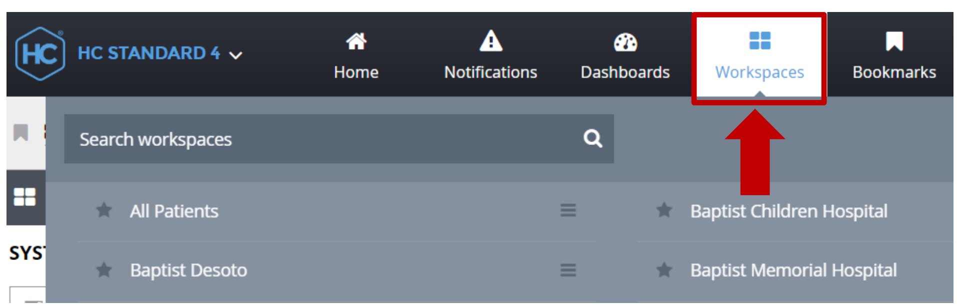
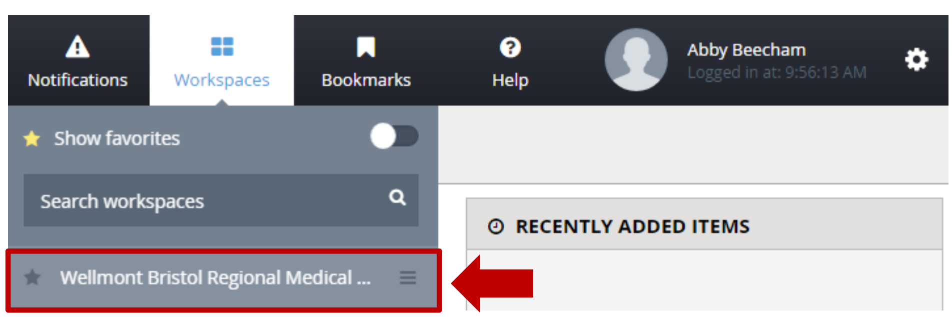
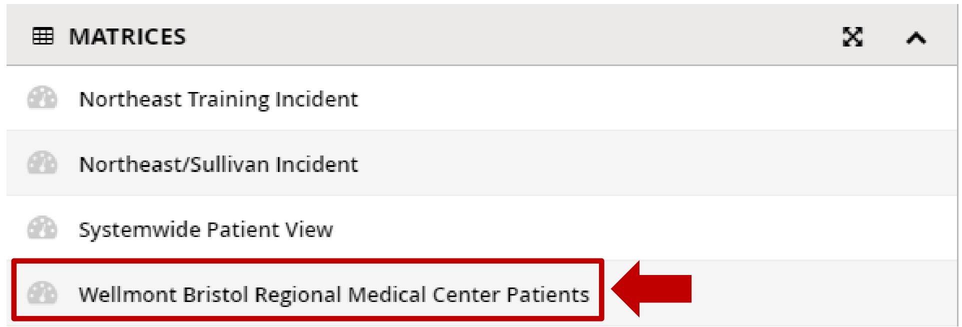
| **STEP 4:**<br>1. Log into the HCS Patient Tracking system by entering your **Username** and **Password** into the respective *Username and Password fields*.<br>2. Click on the **Sign In** button.<br><br>*Result: The home page for the HCS Patient Tracking system displays with a welcome message and your name.*<br>**HELP:** *If you need help with your Username or Password, contact your facility admin or RHC, or visit the TEMARR Customer Service Portal [here](#).* |  |
| **STEP 5:**<br>Click on **Workspaces** at the top of the page.<br>*Result: A Search workspaces field displays, as well as a list of the workspaces assigned to you.* |  |
| **STEP 6:**<br>Enter in the **name of your facility** in the *Search workspaces field* to search it out and then click on the name, or simply click on the name if it is already listed.<br>*Result: The Workspace page for your facility displays.* |  |

**STEP 7:**

Locate and click on **[YOUR FACILITY'S NAME] Patients** within the MATRICES section.

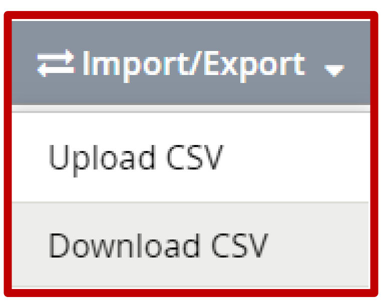
*Result: The Patient Data Results grid for your facility displays, listing all of your registered patients.*



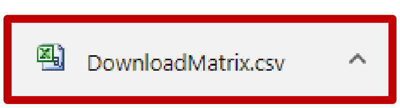

**STEP 8:**

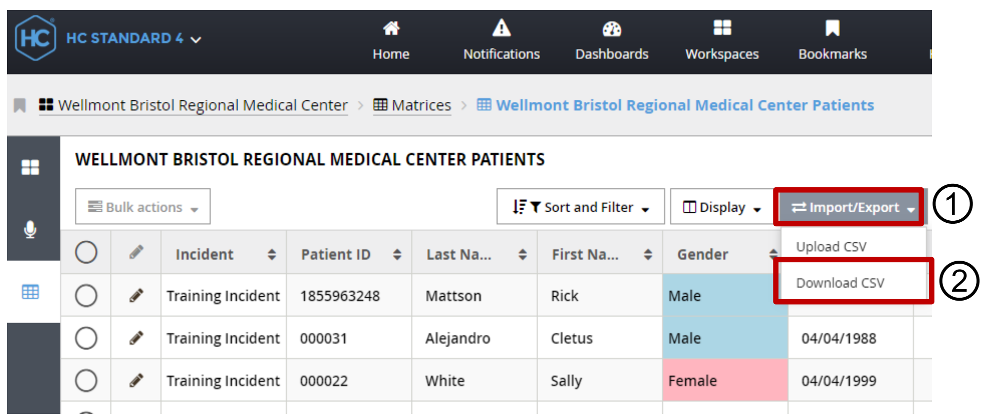
**NOTE:** In order to upload patients into the system, you have to ensure that the headers of your patient data match exactly with the headers in the Patient Data Results grid in the Patient Tracking system. The easiest way to do this is first to export these headers into Excel.

1. Click on the **Import/Export** button above the Patient Data Results grid.
2. Click on **Download CSV**.




*Result: The CSV file will download into the lower left hand corner of your browser with the name DownloadMatrix.csv.*



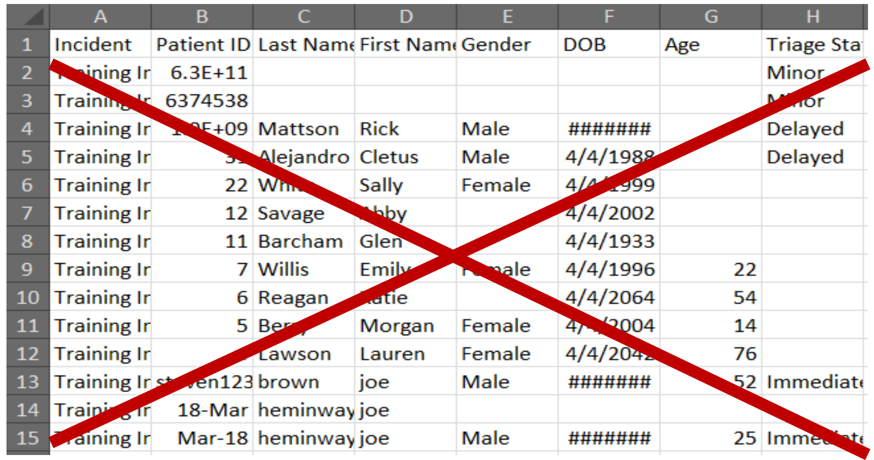



**STEP 9:**

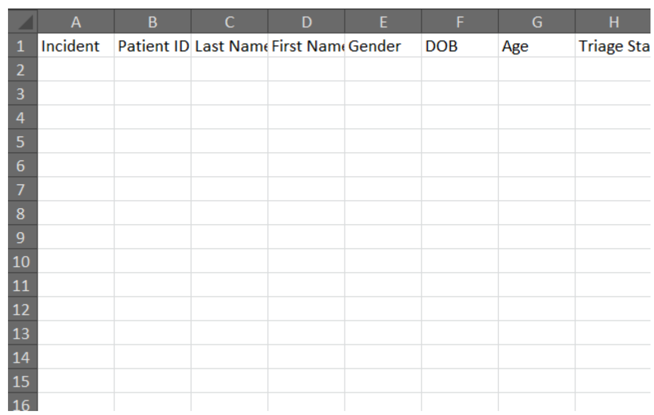
Double click on the **.CSV file** to open it up.

Highlight and delete out all of the data starting with the second row, leaving only the headers of the columns.

**IMPORTANT NOTE:** You **MUST** keep all of the headers in the exact order they are in, because otherwise the import will not work properly.



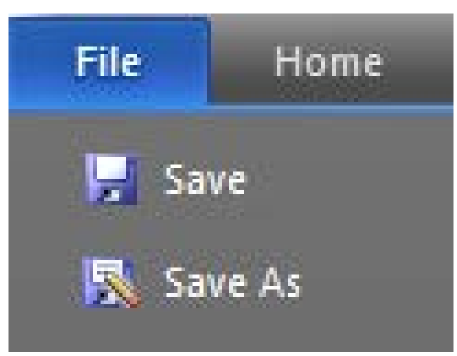
| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | Incident | Patient ID | Last Name | First Name | Gender | DOB | Age | Triage Sta |
| 2 | Training Ir | 6.3E+11 | | | | | | Minor |
| 3 | Training Ir | 6374538 | | | | | | Minor |
| 4 | Training Ir | [illegible]E+09 | Mattson | Rick | Male | ####### | | Delayed |
| 5 | Training Ir | [illegible] | Alejandro | Cletus | Male | 4/4/1988 | | Delayed |
| 6 | Training Ir | 22 | [illegible] | Sally | Female | 4/4/1999 | | |
| 7 | Training Ir | 12 | Savage | Abby | | 4/4/2002 | | |
| 8 | Training Ir | 11 | Barcham | Glen | | 4/4/1933 | | |
| 9 | Training Ir | 7 | Willis | Emily | Female | 4/4/1996 | 22 | |
| 10 | Training Ir | 6 | Reagan | Katie | | 4/4/2064 | 54 | |
| 11 | Training Ir | 5 | [illegible] | Morgan | Female | 4/4/2004 | 14 | |
| 12 | Training Ir | | Lawson | Lauren | Female | [illegible] | 76 | |
| 13 | Training Ir | steven123 | brown | joe | Male | ####### | 52 | Immediate |
| 14 | Training Ir | 18-Mar | heminway | joe | | | | |
| 15 | Training Ir | Mar-18 | heminway | joe | Male | ####### | 25 | Immediate |



| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | Incident | Patient ID | Last Name | First Name | Gender | DOB | Age | Triage Sta |

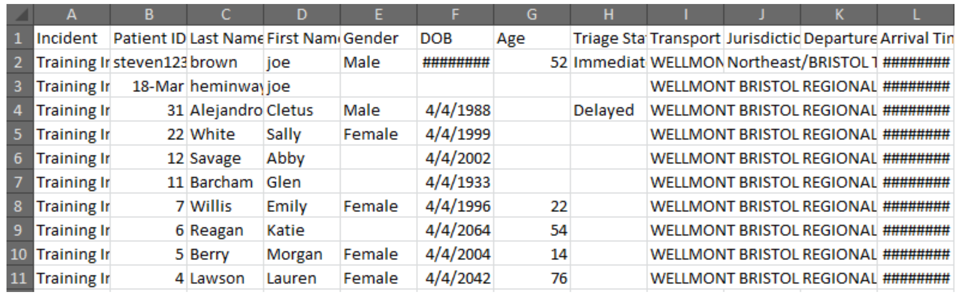
**STEP 10:**

Save this CSV file somewhere you will easily be able to locate it on your computer.



**STEP 11:**

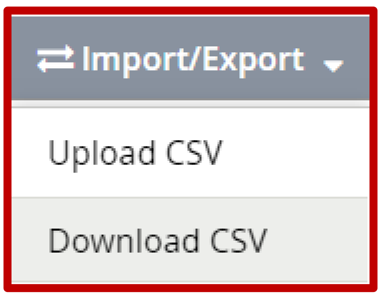
Take the Patient data you want to import, and copy and paste it under the respective headers of the CSV file you just exported. If you don't have any data for a certain column, simply leave that column blank and it will import as such.

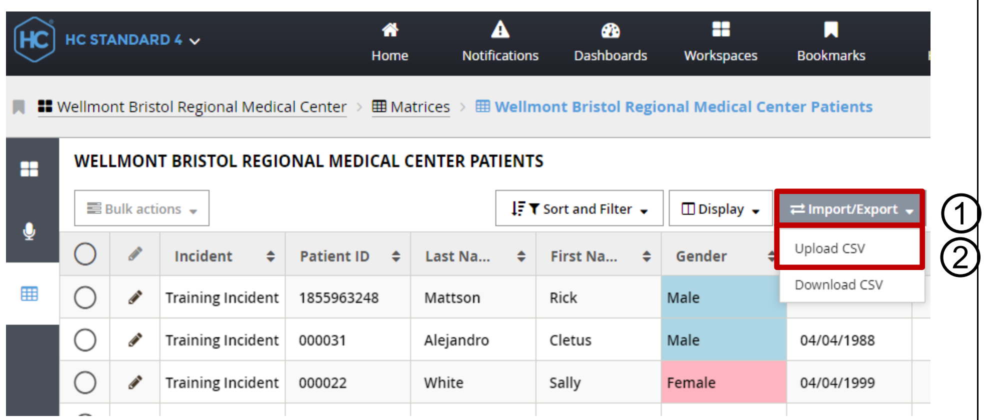


| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Incident | Patient ID | Last Name | First Nam | Gender | DOB | Age | Triage Sta | Transport | Jurisdictic | Departure | Arrival Tin |
| 2 | Training Ir | steven123 | brown | joe | Male | ######## | 52 | Immediat | WELLMON | Northeast/BRISTOL 1 | | ######## |
| 3 | Training Ir | 18-Mar | heminwa | joe | | | | | WELLMONT BRISTOL REGIONAL | | | ######## |
| 4 | Training Ir | 31 | Alejandro | Cletus | Male | 4/4/1988 | | Delayed | WELLMONT BRISTOL REGIONAL | | | ######## |
| 5 | Training Ir | 22 | White | Sally | Female | 4/4/1999 | | | WELLMONT BRISTOL REGIONAL | | | ######## |
| 6 | Training Ir | 12 | Savage | Abby | | 4/4/2002 | | | WELLMONT BRISTOL REGIONAL | | | ######## |
| 7 | Training Ir | 11 | Barcham | Glen | | 4/4/1933 | | | WELLMONT BRISTOL REGIONAL | | | ######## |
| 8 | Training Ir | 7 | Willis | Emily | Female | 4/4/1996 | 22 | | WELLMONT BRISTOL REGIONAL | | | ######## |
| 9 | Training Ir | 6 | Reagan | Katie | | 4/4/2064 | 54 | | WELLMONT BRISTOL REGIONAL | | | ######## |
| 10 | Training Ir | 5 | Berry | Morgan | Female | 4/4/2004 | 14 | | WELLMONT BRISTOL REGIONAL | | | ######## |
| 11 | Training Ir | 4 | Lawson | Lauren | Female | 4/4/2042 | 76 | | WELLMONT BRISTOL REGIONAL | | | ######## |

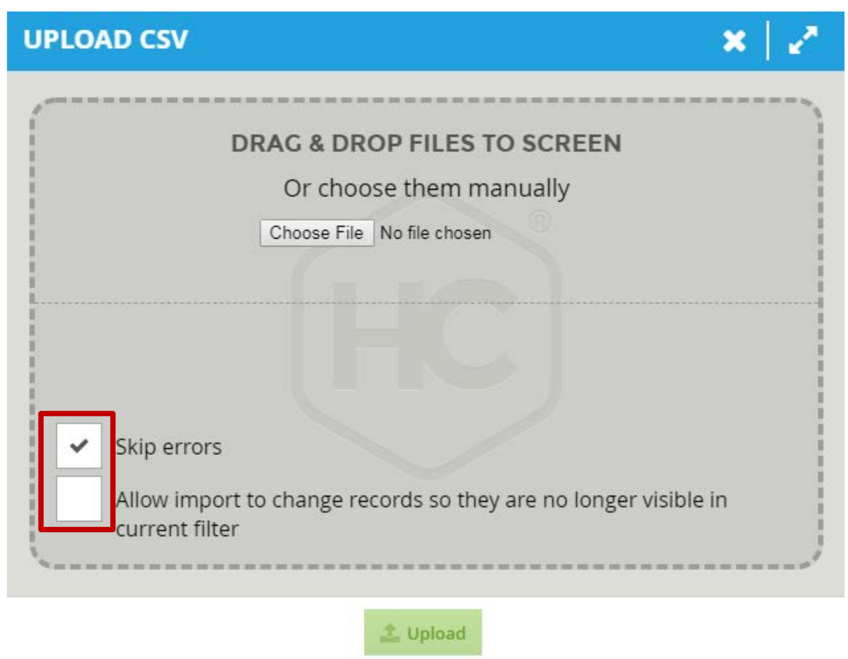
**STEP 12:**

1. Click on the **Import/Export** button above the Patient Data Results grid.
2. Click on **Upload CSV**.




*Result: A popup window displays prompting you to either drag and drop your file or click on Choose File to manually locate it on your computer for upload.*




The options to select towards the bottom of the popup window are:

- Skip errors
- Allow import to change records so they are no longer visible in current filter

If you check the box next to Skip errors, then the upload will skip over any errors that are found in your data. If you uncheck the

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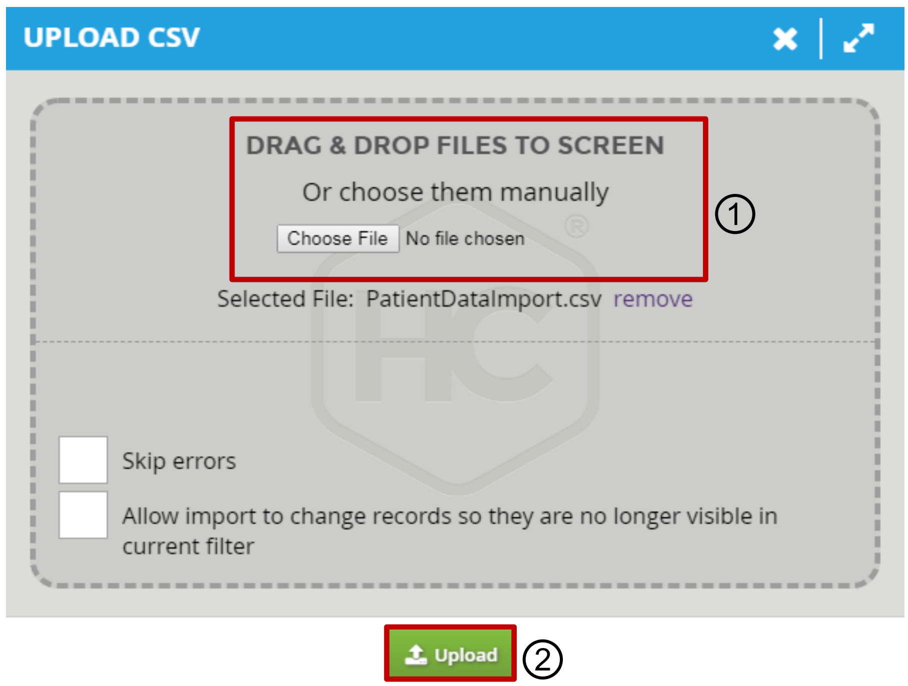
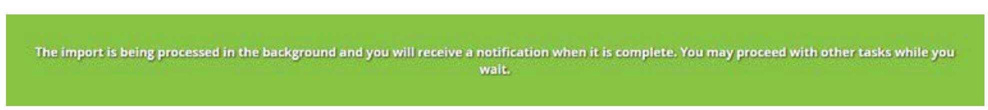
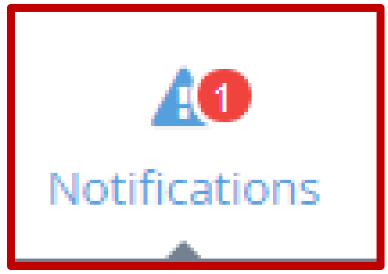
| box, the upload will fail and list the errors that are present in the data.<br><br>If you check the box to allow import to change records so they are no longer visible in current filter, this allows data changes that may move records out of the current filtered view. If you uncheck the box, records will remain unchanged and visible in the current filtered view. | |
| **STEP 13:**<br>1. Upload your .CSV file by either:<br>• Dragging and dropping it onto the popup window or<br>• Clicking the **Choose File** button<br><br>Once the file is attached, it will display in the middle of the screen.<br><br>2. Click the **Upload** button. |  |
| **TIP:** *Whether the import is successful or not, a green popup window will display briefly at the bottom of your screen that says,*<br>***The import is being processed in the background and you will receive a notification when it is complete. You may proceed with other tasks while you wait.*** |  |

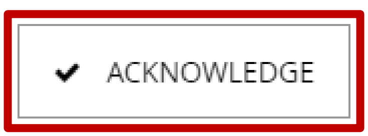
**TIP:** When the upload is complete, a notification (red bubble with a number inside of it) appears in the Notifications at the top of your screen.



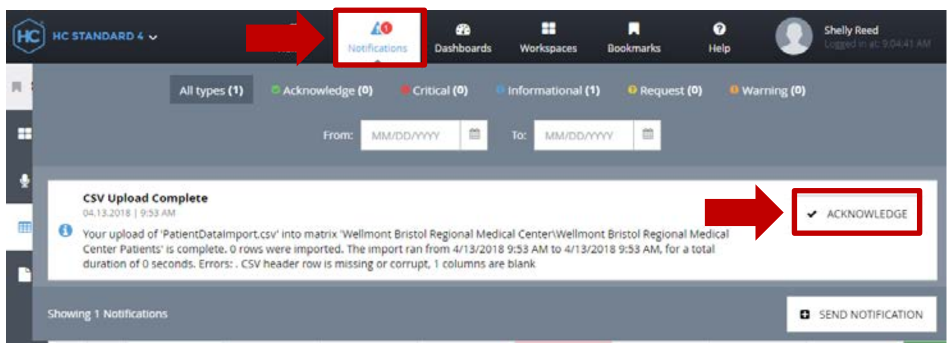

**STEP 14:**

Click on **Notifications** at the top of your screen to view the details of the upload. The details will tell you that the upload is complete, how long it took to run, and will also list out any specific errors (e.g. blank or corrupt columns or rows).

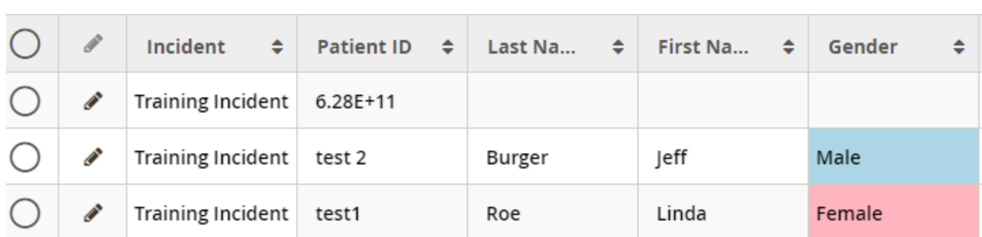
Click on the **Acknowledge** button to clear out this notification.




**TIP:** *If there are no new patients from your import appearing in the Patient Data Results grid, the upload was unsuccessful, and you will need to fix these errors and re-try the upload.*




**TIP:** *If your import was successful, the imported patient records are displayed on the Patient Data Results grid.*



| | | Incident | Patient ID | Last Na... | First Na... | Gender |
|---|---|---|---|---|---|---|
| | | Training Incident | 6.28E+11 | | | |
| | | Training Incident | test 2 | Burger | Jeff | Male |
| | | Training Incident | test1 | Roe | Linda | Female |