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## Importing & exporting patient records

## **Importing patient records**

You can import patient records by using a .csv file. A .csv file is similar to an Excel file, but you cannot import patient records using an Excel file. You can see to the right the 2 FLS import files, one is a .csv, one is an Excel (.xlsx). Only use a .csv file to import data.



There are 2 documents in the resource tab on the webtool that will help you to import your data. <u>V4 import specification</u> – this document outlines what type of value is required in each column for your import to be accepted.

<u>V4 import template</u> – this document is an empty .csv file with the correct column headings for you to complete with your patient records.

To start your import, log into the <u>FLS-DB webtool</u> and click **Import Data** then **Choose file**:



A pop-up box will open your PC files when you select **Choose file:** 

Find your import .csv file then click it to select it then click **Open** to add it to the webtool.

🧿 Open							
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ $\square$ $\Rightarrow$ This PC $\Rightarrow$ Documents $\Rightarrow$ Import log			~	5	🔎 Search Import log		
Organise	e ▼ New folder					□== <b>▼</b>	
^	Name	Туре	Size				
	FLS~ Import test.csv	Microsoft Excel C		17 KB			
	File name: FLS~ In	nport test.csv			~	All Files (*.*)	~



Import file f	or General Hospit	al		Once selected, your file will show here.	
Select file to	import: Choose file (FLS)	~ Impor	t test.csv		
Options					
CSV File Type:	✓ FLS Patient CSV File v3 FLS Patient CSV File v4		s a f	Select which dataset you are importing by following the guidance.	
Use V2 for path Use V3 for path Use V4 for path Aways ensure	ients diagnosed after 31/12/201 ients diagnosed after 31/12/201 ients diagnosed on or after 01/0 <b>you are using the latest import</b>	7 and bej 9 and bej 1/2022 <b>spec fro</b> i	fore 01/01/2020 fore 01/01/2022 <b>n the resources s</b>	rection	
Allow for Column Headings: O Yes   No			If you use the column headi	import template, this inclungs so you must select <b>Yes</b>	udes •
Import new	Once you have completed the above steps, you must click <b>Import new</b> to complete the import		lf your .csv file select <b>No.</b>	e does not have headings, t	then

Your import will then upload and you will be taken to a page that looks similar to this:

Royal Colle of Physicia						
Home   Patient Views   Chi	Home   Patient Views   Charts   Benchmarks   Import Data   Export Data   Resources   Support					
Where records are rejected,	Import log         Import file:       FLS~ Import test.csv         Imported on:       19/08/2022 14:43         By:       Web2         File-Type:       FLS PATIENT CSV FILE V3         Errors and warnings         Summary       Fatal Errors         Serious Errors       Warnings         You import file has been processed. Please review the following notes:         Some new records have imported.         No existing records have been modified.         Some records have not been imported because they have fatal errors and cannot be imported.	If you use and update one .csv file for your FLS, you can add follow up data to a record, and it will update the existing record (rather than duplicate the submission).				
<b>Fatal errors</b> tab, fix the error in your .csv file then import it again to add the records with errors.	New records added to database.     50     98%       Existing records updated:     0     0%       Identical records skipped:     0     0%       Rejected records (fatal errors):     1     2%       Total records uported as drafts)     51     100%       Errors (records imported as drafts)     0     0%       Minor errors:     0     0%	The import will skip identical records that have not been updated and have already been imported.				

## **Exporting patient records**

