

## Using the data upload method - next steps



### **Extracting your file from your local electronic system**

Unless you have a local database or spreadsheet, you may need to liaise with member of staff from your informatics or business intelligence department to export your data from your local electronic system. The file should contain only episodes of care where there is a start and a final TOMs rating for each service user. To ensure that there are no gaps or duplicates across consecutive files, it is recommended that the file contains all TOMs data for episodes of care that have finished within a given date range.



### **Consider creating a duplicate file to work from**

You may need to make changes to file and it may be useful to preserve the original.



### **Double check that the file only contains the data authorised by your Information Governance leads**

Cross-reference your spreadsheet with the list of fields in the data processing agreement. Things to look out for include patients' names and dates of birth. Each patient will need a unique identifier, which is known only within the organisation and may be specified by your information governance department.

If your file contains date of birth rather than year of birth, this can be done by inserting a new column into the spreadsheet and using the function =Year(Date) [where 'Date' is the cell containing the date of birth].

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### **Check that the file is in .xlsx format**

If it is in not, this can be done by changing the file type when saving the file, or converting it.



### **Remove any formulae in the spreadsheet**

Some spreadsheets contain formulae or formatting, which cannot be handled by the importer. To do this, you will need to reformat the cells.



### **Set aside some time to make the first data upload**

Once your file is prepared, you are ready to upload it to the ROOT. When uploading for the first time, you should allow at least one hour to familiarise yourself with the process and upload the file. Subsequent uploads should take less time.

We have developed resources to support you with using the data import process, which are available [here](#).



### **Setting up logins**

Each member of staff will need an individual login to the ROOT to be set up. Information about how to set up new log-ins for your colleagues is available [here](#).