

# *Software Procedure*

## **SWP-0035 AFHCAN tConsult Patient Import Procedures**

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## Purpose

This document provides the necessary steps to import patient data from other electronic medical record sources.

## Audience

This document is written for IT technicians and system administrators who are responsible for building, configuring or maintaining a tConsult Telehealth Server. It is assumed readers are familiar with intermediate-level computer terms and concepts.

## Scope

With today's multiple electronic medical record sources, AFHCAN has been involved in attempting to merge EHR records and avoid duplicate entry between the EHR sources. The steps detailed in this document will import patient data from an electronic medical record source that can be used by providers within the tConsult software.

## Acronyms and Abbreviations

Table 1 lists the abbreviations and acronyms used in this document.

**Table 1**  
Acronyms and abbreviations

Acronym	Meaning
EHR	Electronic Health Record

## Establishing Patient Source

This section details the steps for establishing the patient source.

1. Log in to the tConsult server using an administrative account.
2. Open SQL Enterprise Manager, and locate the tConsult database. Expand the Tables and do a right mouse-click on the ServerSettings table, and select Open Table, Return All Rows.

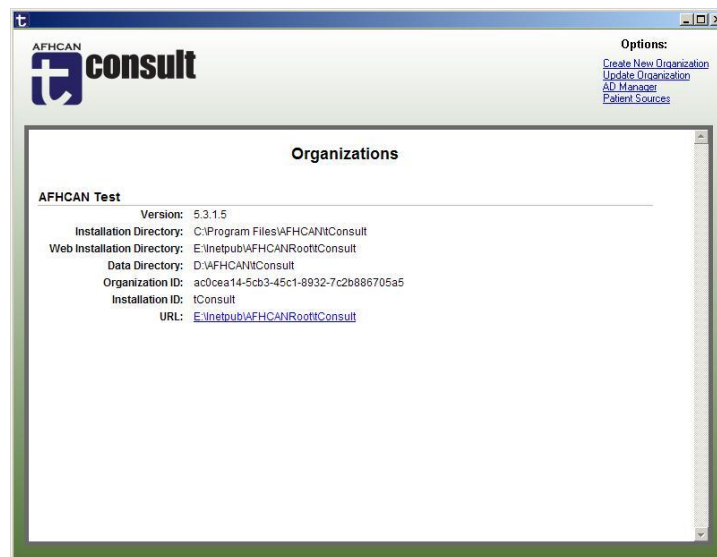


4. Close SQL Enterprise Manager.

## tConsult Server Manager and Patient Sources

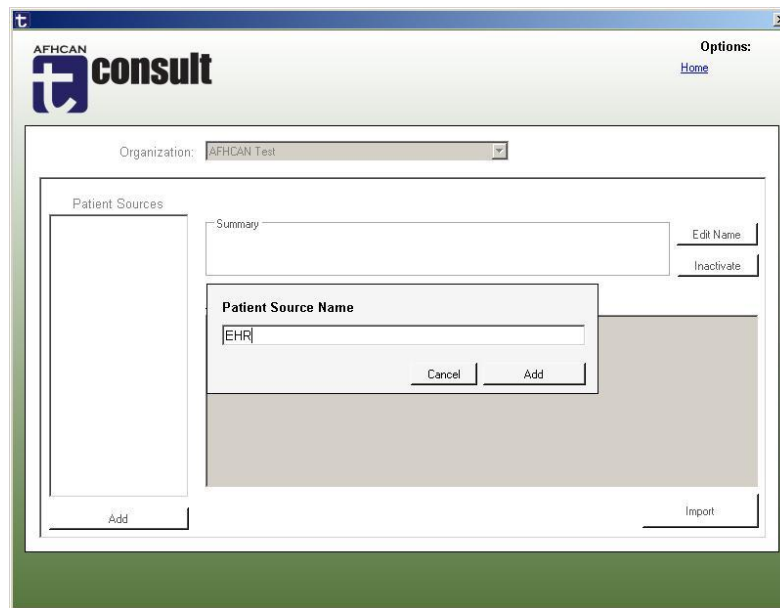
This section details using tConsult Server Manager and importing patient sources.

1. Locate the source of the patient demographic data, be it on CD-ROM, DVD, USB drive, etc. Import files may be both tab and semi-colon delimited and generally are named with a '.txt' file extension.
2. Open tConsult Server Manager, and click on the "Patient Sources" link.



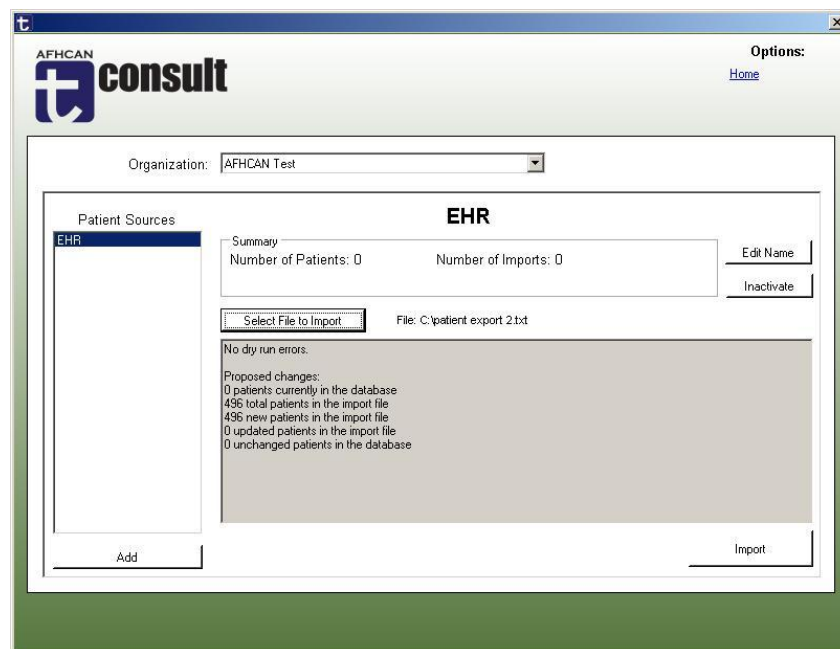
**Figure 3 – Using tConsult Server Manager**

3. After verifying the Organization name, click on the Add button below Patient Sources. Enter the Patient Source Name, and click on Add.



**Figure 4 – Creating Patient Source Name**

4. Click on “Select File to Import” button, and select the file identified in Step 1 of this section.
5. If there are no dry run errors, click on the “Import” button.



**Figure 5 – Verifying No Errors**

- Once all records have been imported, click on “OK”.

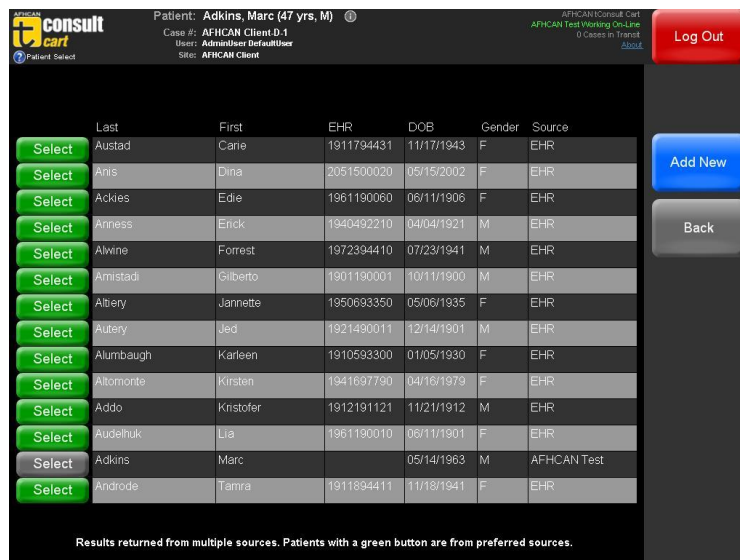


**Figure 6 – Successful Import Dialog Box**

- Close tConsult Server Manager

## Selecting Patient Sources

- To verify a successful import with tConsult Cart client, create a “Real Case”, click on “Patients” and do a search. Patients that have been imported will have a green button next to them, while locally created tConsult patients will have a gray button next to them.



**Figure 7 – Selecting Patients within tConsult Cart Client**

- Using tConsult Web Client, search results for Patients return green with a lock depicted on the icon for imported patients and bluish-gray on locally created tConsult patients.

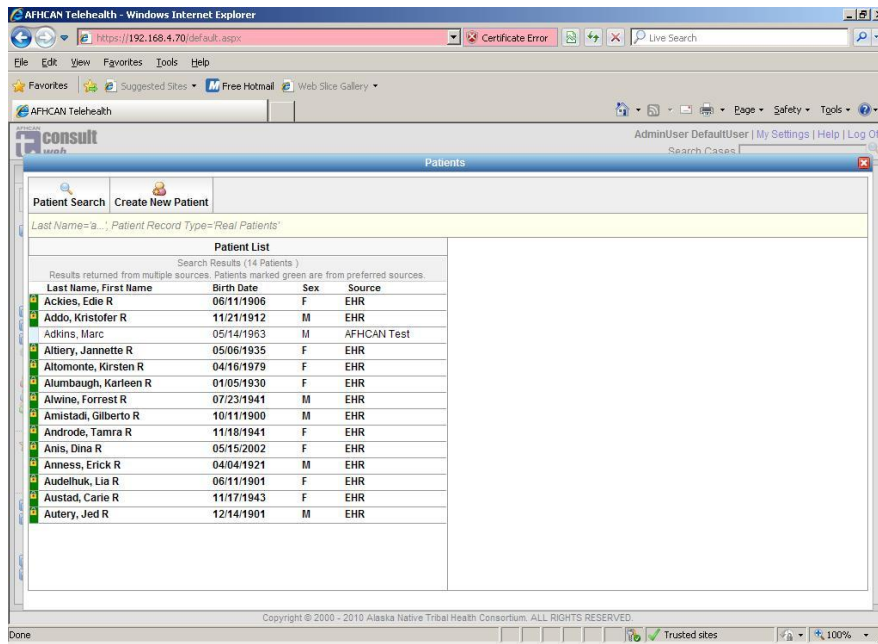


Figure 8 – Selecting Patients within tConsult Web Client

End of procedure.