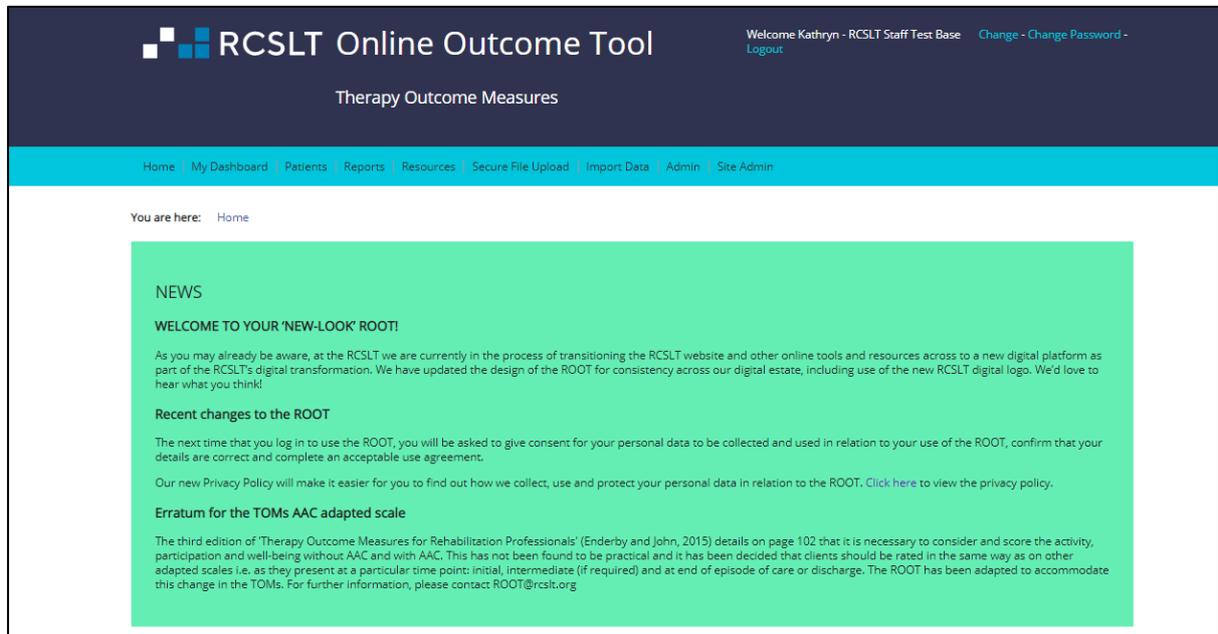


Using the new import process – draft guidance

Step one: Upload the file to the ROOT

1a. Sign in to the ROOT (<https://rslt-root.org>) and then click 'Import Data':



The screenshot shows the RCSLT Online Outcome Tool interface. The header includes the logo and navigation links: Home, My Dashboard, Patients, Reports, Resources, Secure File Upload, Import Data, Admin, and Site Admin. The main content area features a green box with the following text:

NEWS

WELCOME TO YOUR 'NEW-LOOK' ROOT!

As you may already be aware, at the RCSLT we are currently in the process of transitioning the RCSLT website and other online tools and resources across to a new digital platform as part of the RCSLT's digital transformation. We have updated the design of the ROOT for consistency across our digital estate, including use of the new RCSLT digital logo. We'd love to hear what you think!

Recent changes to the ROOT

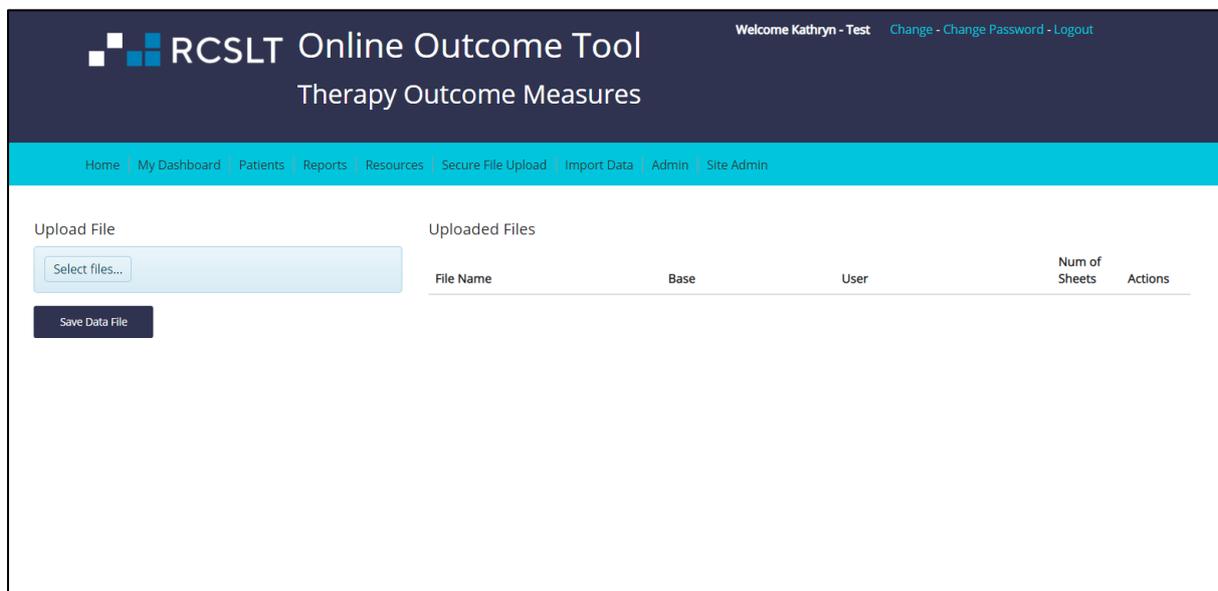
The next time that you log in to use the ROOT, you will be asked to give consent for your personal data to be collected and used in relation to your use of the ROOT, confirm that your details are correct and complete an acceptable use agreement.

Our new Privacy Policy will make it easier for you to find out how we collect, use and protect your personal data in relation to the ROOT. [Click here](#) to view the privacy policy.

Erratum for the TOMs AAC adapted scale

The third edition of 'Therapy Outcome Measures for Rehabilitation Professionals' (Enderby and John, 2015) details on page 102 that it is necessary to consider and score the activity, participation and well-being without AAC and with AAC. This has not been found to be practical and it has been decided that clients should be rated in the same way as on other adapted scales i.e. as they present at a particular time point: initial, intermediate (if required) and at end of episode of care or discharge. The ROOT has been adapted to accommodate this change in the TOMs. For further information, please contact ROOT@rslt.org

1b. Click 'select files' and select the file that you want to upload



The screenshot shows the 'Upload File' interface. It includes a 'Select files...' button and a 'Save Data File' button. To the right, there is a table titled 'Uploaded Files' with the following columns: File Name, Base, User, Num of Sheets, and Actions.

File Name	Base	User	Num of Sheets	Actions
-----------	------	------	---------------	---------

1c. Click 'save data file'

The screenshot shows the RCSLT Online Outcome Tool interface. The header includes the logo and the text 'RCSLT Online Outcome Tool Therapy Outcome Measures'. A navigation bar contains links for Home, My Dashboard, Patients, Reports, Resources, Secure File Upload, Import Data, Admin, and Site Admin. The user is logged in as 'Kathryn - Test'. The 'Upload File' section has a 'Select files...' button and a file named 'RCSLT Outcomes Database Template - epl...' (24.83 KB) is selected. A 'Save Data File' button is visible below the file selection area. The 'Uploaded Files' table is currently empty.

1d. Next to the file name on the right hand side, click 'import'

The screenshot shows the RCSLT Online Outcome Tool interface after the file has been saved. The 'Upload File' section is still visible. The 'Uploaded Files' table now contains one entry:

File Name	Base	User	Num of Sheets	Actions
RCSLT Outcomes Database Template - episode per row - to upload v2.xlsx	Test	kathryn.moyse@rcslt.org 14 January 2019	-	Import

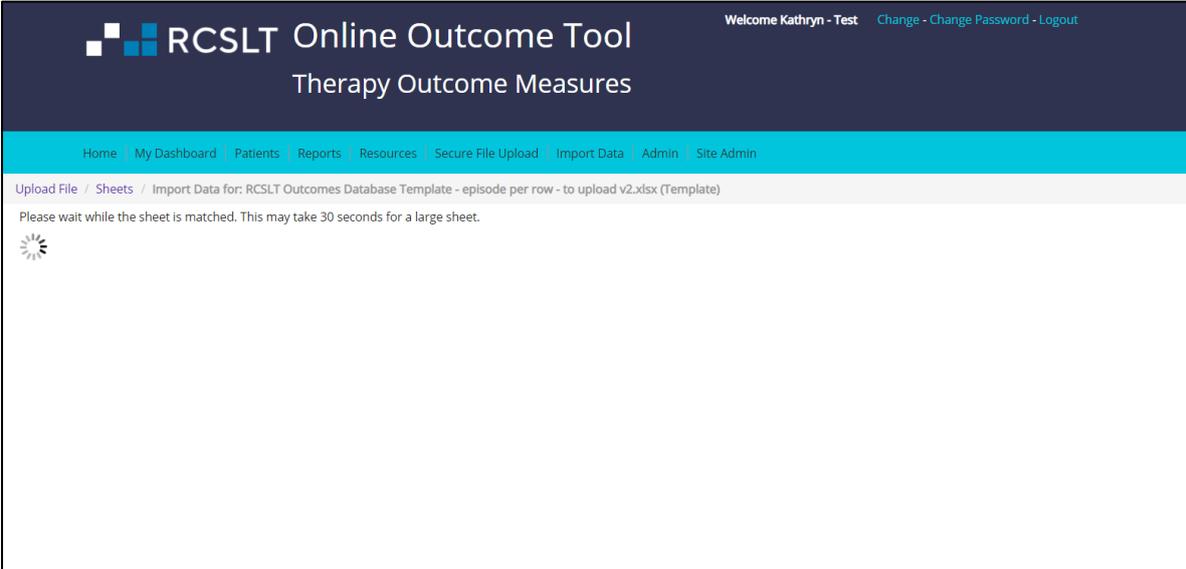
1e. The different sheets in the workbook will display on the screen. Please be aware that there may be hidden tabs in your workbook, which will also be listed. Select 'import' for the sheet that you wish to import first.



The screenshot shows the 'RCSLT Online Outcome Tool' interface. The header includes the logo and the text 'RCSLT Online Outcome Tool Therapy Outcome Measures'. A navigation bar contains links for Home, My Dashboard, Patients, Reports, Resources, Secure File Upload, Import Data, Admin, and Site Admin. The main content area shows a breadcrumb trail: 'Upload File / Sheets / Import Data for: RCSLT Outcomes Database Template - episode per row - to upload v2.xlsx'. Below this is a table with the following data:

Sheet Name	Status	Date	Actions
Template	Not Started	14 Jan 2019	Import
LookUps	Not Started	14 Jan 2019	Import
Reference Cells	Not Started	14 Jan 2019	Import

1f. The ROOT will begin to process the file. You may see the following displayed for a short while, depending on the size of the file:



The screenshot shows the same interface as above, but with a loading message: 'Please wait while the sheet is matched. This may take 30 seconds for a large sheet.' Below the message is a loading spinner icon.

Step two: Start the column mapping process

2a. The ROOT will attempt to identify the row in your spreadsheet that contains the column headings and this will be highlighted in orange. Check that this is correct, otherwise click on the appropriate row in the spreadsheet, then click 'next'.

The screenshot shows the RCSLT Online Outcome Tool interface. At the top, it says "RCSLT Online Outcome Tool" and "Therapy Outcome Measures". There are navigation links: Home, My Dashboard, Patients, Reports, Resources, Secure File Upload, Import Data, Admin, Site Admin. Below that, it says "Upload File / Sheets / Import Data for: RCSLT Outcomes Database Template - episode per row - to upload v2.xlsx (Template)".

A message states: "We think we have selected the row containing the heading. Please check this is correct and then click the next button." There is a "Next" button to the right.

LocalPatientIdentifier	YearOfBirth	Gender	PrimaryCommunicationSwallowingDisorderDescriptor	PrimaryCommunicationSwallowingDisorderCodeICD10/11	AdditionalCommunicationSwallowingDisorderDescriptor	AdditionalCommunicationSwallowingDisorderCode
KLM86735	2008	Male	F98.5	Stammering		
BHY69473	2012	Female	Apraxia/dyspraxia	R48.2		
BHH97545	2101	Female	Dysphonia	R49.0	hypermasality	r49.21
HTY80832	2011	Male	Expressive language disorder	F80.1	Receptive language disorder	F80.2
BHY69473	2012	Female	Apraxia/dyspraxia	R48.2		
PUM86735	2008	Male	F98.5	Stammering		
HJL893728	2012	Male	Social (pragmatic) communication disorder	F80.82	Speech disorder	F80.0

At the bottom of the table, there is a "Next" button.

2b. Next, identify which type¹ of file you are uploading:

- Episode per row
- Rating per row
- Score per row

Should you require any further support with identifying the correct option, please use [this document](#), or contact root@rcslt.org



The screenshot shows the RCSLT Online Outcome Tool interface. The header includes the logo and title 'RCSLT Online Outcome Tool' and 'Therapy Outcome Measures'. The user is logged in as 'Kathryn - Test'. The navigation menu includes 'Home', 'My Dashboard', 'Patients', 'Reports', 'Resources', 'Secure File Upload', 'Import Data', 'Admin', and 'Site Admin'. The current page is 'Upload File / Sheets / Import Data for: RCSLT Outcomes Database Template - episode per row - to upload v2.xlsx (Template)'. The 'Select sheet type:' dropdown menu is open, showing 'Row per episode' as the selected option. There are 'Back' and 'Next' buttons on the right side of the page.

¹ **Episode per row:** A file that has an episode per row will contain the TOMs scores for a complete episode of care for a service user in a single row in the spreadsheet. Typically, this will include a rating made at the start of an episode of care and one that is made at the end. It may be the case that interim/intermediate ratings are also included if this is standard practice for your service.

Rating per row: A file that has a rating per row will contain the TOMs scores (for 'impairment', 'activity', participation, 'well-being', 'carer well-being') for a single point in time for a service user on a single row of the spreadsheet. An episode of care will therefore be represented across multiple rows in the spreadsheet (i.e. the rating made at the start of the episode will be on a separate row from the rating at the end of the episode, as will any interim ratings).

Score per row: In this file structure, the scores for each domain of TOMs appear on separate rows of the spreadsheet. Thus, scores for impairment, activity, participation, wellbeing and carer wellbeing at a single point in time (including at the start of the episode, the end of the episode and any interim points) will occupy separate rows. This is classically how a database would export the data.

Step three: Verify all of the 'accepted' (green) and 'ignored' (grey) column headings

3a. The column headings that have been 'accepted' will appear as green on the colour-coded sheet. This may be because you have previously uploaded a file with the same heading and all of the data is as expected. However, you should check that the 'type' of column allocated by the ROOT is correct. You can check this by clicking on the column heading, which will bring up a small window with this information.

The screenshot shows the RCSLT Online Outcome Tool interface. A dialog box titled 'LocalPatientIdentifier' is open, indicating it is 'Accepted'. The dialog prompts the user to change the mapping by selecting from drop-down boxes for 'Category' (set to 'Patient') and 'Type' (set to 'Patient ID'). There are 'Match Cells', 'Reset', and 'Ignore' buttons. The background shows a table with columns for various outcome measures, some highlighted in green (accepted) and others in grey (ignored/empty). The table contains data rows with patient identifiers, birth years, genders, and various medical descriptors like 'dysphagia', 'dysphonia', and 'stroke'.

If you need to change the 'type' of column, you can do this by selecting the relevant options from the drop down boxes, 'category' and 'type'. The tables in Annexes 1-3 can support with this. If there is not an appropriate descriptor and you still wish to import the column, you will need to create a user defined field (please see step 7).

This is an identical screenshot to the one above, showing the RCSLT Online Outcome Tool interface with the 'LocalPatientIdentifier' dialog box and a data table.

3b. Repeat this step for all of the green column headings.

3c. Similarly, check that all of the 'grey' headings have correctly been ignored. This may be because the column contains no data, or you have previously opted to 'ignore' this column type. If this is a mistake and you would like the column to be imported, click on the column heading and manually select the 'category' and 'type' of the column from the drop-down options. The tables in Annexes 1-3 can support with this.

The screenshot shows the RCSLT Online Outcome Tool interface. At the top, it says "Welcome Kathryn - Test1" and "Change - Change Password - Logout". The main heading is "Therapy Outcome Measures". Below this, there are navigation tabs: "Home", "My Dashboard", "Patients", "Reports", "Resources", and "Security". A status bar indicates "Green: All cells matched", "Yellow: Some cells matched", "Blue: Not accepted", and "Orange: Column no...".

A dialog box titled "No Title" is open, with the text "To change this mapping, please select from the drop-down boxes:". It contains two dropdown menus: "Category" and "Type", both currently set to "None". There are "Reset" and "Ignore" buttons at the bottom of the dialog.

The background shows a data table with columns for various metrics and rows for different years (2017, 2018, 2019). The columns are color-coded: green for active data, grey for ignored columns, and orange for intervention columns. The table includes columns for "Impairment Rating", "Activity Rating", "Wellbeing Rating", "Discharge Codes", "Direct Time", "Indirect Time", "Total Time", "Person delivering", "Care spell", and "Intervention".

3d. Repeat this step for all of the grey column headings.

Step four: Verify the automatically mapped column headings (purple)

4a. The column headings in purple have been mapped automatically, but you will need to check that the description that has been allocated is correct. Again, you can do this by selecting the column heading, and checking what mapping is listed in the pop-up box.

In the example below, the column with the heading 'LocalPatientIdentifier' has been mapped to 'Patient ID'. If this is correct, click 'accept'.

The screenshot shows the 'Therapy Outcome Measures' interface. A pop-up window titled 'LocalPatientIdentifier' is open, showing a dropdown menu for 'Category' set to 'Patient' and a dropdown menu for 'Type' set to 'Patient ID'. The 'Accept' button is highlighted. The background table shows various columns with purple headers, including 'LocalPatientIdentifier', 'YearOfBirth', 'Gender', 'PrimaryCommunication', 'PrimaryMedicalDiagnosis', etc.

4b. If the ROOT has incorrectly mapped the column heading, use the drop down boxes to identify the most appropriate descriptor. You will need to select the 'category' of the data, followed by which 'type', then click 'save'. The tables provided in Annexes 1-3 will support with this.

The screenshot shows the 'Therapy Outcome Measures' interface. A pop-up window titled 'LocalPatientIdentifier' is open, showing a dropdown menu for 'Category' with options: 'None', 'Create UDF...', 'Existing UDFs Standard', 'Gender', 'NHS Number', and 'Patient ID'. The 'Type' dropdown menu is also open, showing options: 'Patient ID' and 'Year of birth'. The 'Accept' button is highlighted. The background table is the same as in the previous screenshot.

4c. If you do not wish to import a column in your spreadsheet, click 'ignore'

4d. If you wish to import a column but an appropriate option does not appear in the drop-down boxes, you may need to create a 'user defined field' (please see step 7).

4e. The column heading will then:

- turn green if all values in the cells in that column are correct
- turn grey if you have opted not to import this column of data
- turn yellow if there are unmatched cells in the column (see steps 6 and 8)

4f. Complete this process for all purple columns in the file

Step five: Mapping an unmatched column heading (orange)

5a. If a column heading is orange, this means that the ROOT cannot automatically detect the type of column. You will need to click on the column heading to bring up the column-mapping window, and select the 'category' and 'type' of column manually. The tables in Annexes 1-3 can support with this.

5b. If there is not an appropriate descriptor and you still wish to import the column, you will need to create a user defined field (please see step 7).

The screenshot shows the RCSLT Online Outcome Tool interface. At the top, it says "Welcome Kathryn - Test" and "Change - Change Password - Logout". The main heading is "Therapy Outcome Measures". Below this is a navigation bar with "Home", "My Dashboard", "Patients", "Reports", "Resources", and "Secure File Upload". There is also a link for "Upload File / Sheets / Import Data for: RCSLT Outcomes Database Template - episode pa".

A modal window titled "AdditionalCommunicationSwallowingDisorderDescriptor" is open, showing "Category: None" and "Type: None" with dropdown menus. Below the modal is a table with columns: "No Title", "LocalPatientIdentifier", "YearOfBirth", "Gender", "PrimaryCommunications...", "AdditionalComm...", "AdditionalComm...", "AdditionalMedicalDiagno...", "AdditionalMedicalDiagno...", and "PrimaryCOMScale". The table contains patient data with some cells highlighted in orange, indicating unmatched column headings. A "Sort By: Original" dropdown and "Back" and "Next" buttons are visible on the right side of the table.

No Title	LocalPatientIdentifier	YearOfBirth	Gender	PrimaryCommunications...	AdditionalComm...	AdditionalComm...	AdditionalMedicalDiagno...	AdditionalMedicalDiagno...	PrimaryCOMScale
No Title	KLM86735	2008	Male	F98.5	Stammering				
	BHY69473	2012	Female	Apraxia/dyspraxia	R48.2				
	BHH97545	2101	Female	Dysphonia	R49.0	hypermasality	r49.21		
	HTY80832	2011	Male	Expressive language disorder	F80.1	Receptive langauge disorder	F80.2		Ch
	BHY69473	2012	Female	Apraxia/dyspraxia	R48.2				
	PLM86735	2008	Male	F98.5	Stammering				
	HJL893728	2012	Male	Social (pragmatics) communication disorder	F80.82	Speech disorder	F80.0	Autism	F84

6e. If you need to make a change, click 'reset':

The screenshot shows the RCSLT Online Outcome Tool interface. A dialog box titled 'Gender' is open, with 'Accepted' in a green box. It contains a 'Category' dropdown set to 'Patient' and a 'Type' dropdown set to 'Gender'. Below the dropdowns are three buttons: 'Match Cells', 'Reset', and 'Ignore'. The background shows a table with columns for patient information and various outcome measures. Some cells are yellow, indicating they are not yet mapped, and some are grey, indicating they are ignored or empty. A legend at the bottom of the table explains the colors: Green: Column/Cells matched and accepted; Yellow: Column matched; Orange: Column not matched; Grey: Ignored or Empty.

6f. Repeat for any other columns that are yellow.

6g. Refer to step 8 for matching cells in 'user defined fields'.

6h. Once all mapping complete, sheet should appear green and grey. Then click 'next'.

The screenshot shows the RCSLT Online Outcome Tool interface after the mapping process is complete. The table is now mostly green, indicating that the columns and cells have been matched and accepted. The legend at the bottom of the table is the same as in the previous screenshot. The table contains data for various outcome measures, including 'Dysfluency', 'Core', 'Dysphonia', 'Child language impairment', 'Autism', and 'Stammering'. The 'Rating' column shows values for each measure, and the 'Date' column shows the date of the assessment.

Steps seven and eight: User defined fields

These steps are only relevant if your spreadsheet contains 'user defined fields', which are columns of data that are additional to the core fields of data collected by the ROOT. Otherwise, please turn to step 9.

PLEASE NOTE: These fields can only be added once authorised by your information governance department. Please refer to the ROOT Information Governance Pack for further details.

Step seven: Creating a user defined field

7a. If your spreadsheet contains a column that is not one of the core fields, the first time you upload the data, the ROOT may attempt to allocate this to a core field and pick an incorrect option (image A) or not, and the options will be blank (image B).

A

RCSLT Online Outcome Tool
Therapy Outcome Measures

Welcome Kathryn - Test Base [Change](#) - [Change Password](#) - [Logout](#)

Home My Dashboard Patients Reports Resources

Upload File / Sheets / Import Data for: Test Base

Green: Column/Cells matched and accepted Yellow: Column matched and not accepted

Name of SLT

To change this mapping, please select from the drop-down boxes:

Category: Episode

Type: Primary Communication/Swallowing Disorder Descriptor

Accept Ignore

Category: Episode Type: Primary TOMs Scale	Primary TOMs Scale ID	Category: Episode Type: Primary TOMs Scale	Secondary TOMs Scale ID	Category: Episode Type: Secondary TOMs Scale	Rating Date Start	Category: Rating Type: Rating Date	Name of SLT Category: Episode Type: Primary	Impairment Rating	Category: Rating Type: Impairment Start	Impairment Rating	Category: Rating Type: Impairment Start									
Autism	2	Phonological disorder	40	Phonological disorder	21/10/2017	Jane	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Child Language Impairment		Phonological disorder	41	Phonological disorder	13/04/2016	Liam	4	4	4	4	4	4	4	4	4	4	4	4	4	
Dysfluency	23				25/05/2016	Liam	3													
Core	0				13/05/2016	Jane	3													
Dysphonia	26				15/08/2016	Monisha	2													
Child language impairmt	6				25/05/2016	Claire	3													
Core	0				13/04/2016	Liam	3													
Dysfluency	23				21/10/2017	Jane	3	3	3	3	3	3	3	3	3	3	3	3	3	
Autism	2	Phonological disorder	40	Phonological disorder	21/10/2017	Jane	3	3	3	3	3	3	3	3	3	3	3	3	3	
Child Language Impairment		Phonological disorder	41	Phonological disorder	13/04/2016	Liam	4	4	4	4	4	4	4	4	4	4	4	4	4	

B

RCSLT Online Outcome Tool
Therapy Outcome Measures

Welcome Kathryn - Test [Change](#) - [Change Password](#) - [Logout](#)

Home My Dashboard Patients Reports Resources

Upload File / Sheets / Import Data for: RCSLT Outcomes Database Test Base

Green: Column/Cells matched and accepted Yellow: Column matched and not accepted

Name of SLT

Category: None

Type: None

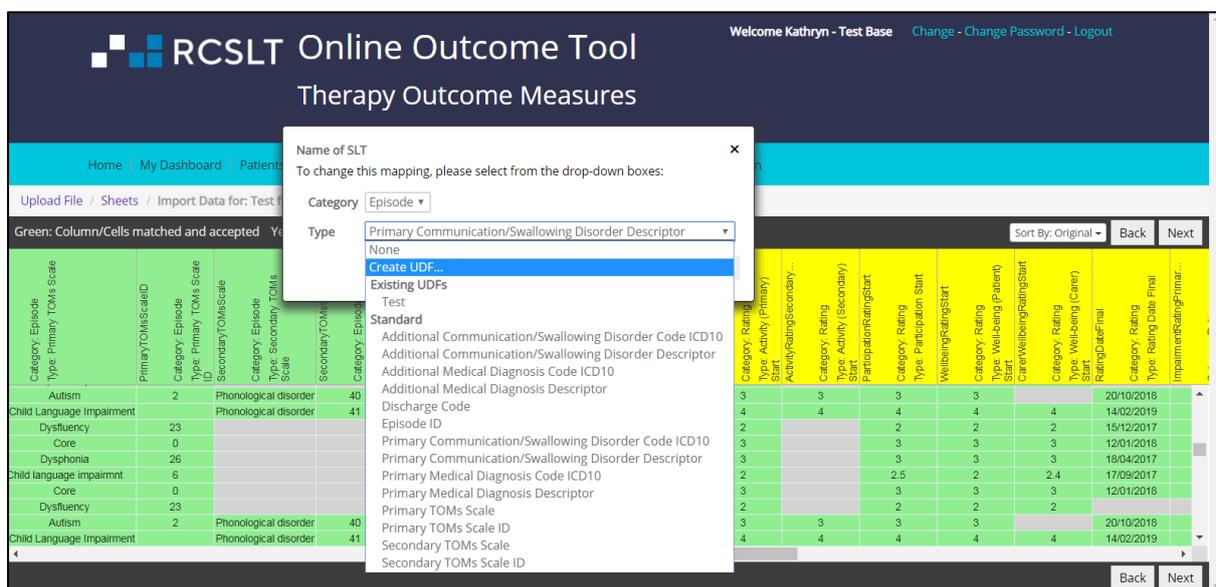
Accept Ignore

Additional Medical Diagnosis	Primary TOMs Scale	Category: Episode Type: Primary TOMs Scale	Secondary TOMs Scale ID	Category: Episode Type: Secondary TOMs Scale	Rating Date Start	Category: Rating Type: Rating Date	Name of SLT Category: Episode Type: Primary	Impairment Rating	Category: Rating Type: Impairment Start	Impairment Rating	Category: Rating Type: Impairment Start									
	Dysfluency	23			13/04/2016	Abigail	3	3	3	3	3	3	3	3	3	3	3	3	3	
	Core	0			25/05/2016	Liam	3													
	Dysphonia	26			13/05/2016	Jane	3													
	Child language impairmt	6			15/08/2016	Monisha	2													
	Core	0			25/05/2016	Claire	3													
	Dysfluency	23			13/04/2016	Liam	3													
	Autism	2	Phonological disorder	40	21/10/2017	Jane	3	3	3	3	3	3	3	3	3	3	3	3	3	

7b. You will need to create a 'user defined' field. Firstly, you will need to select the 'category' of the data:

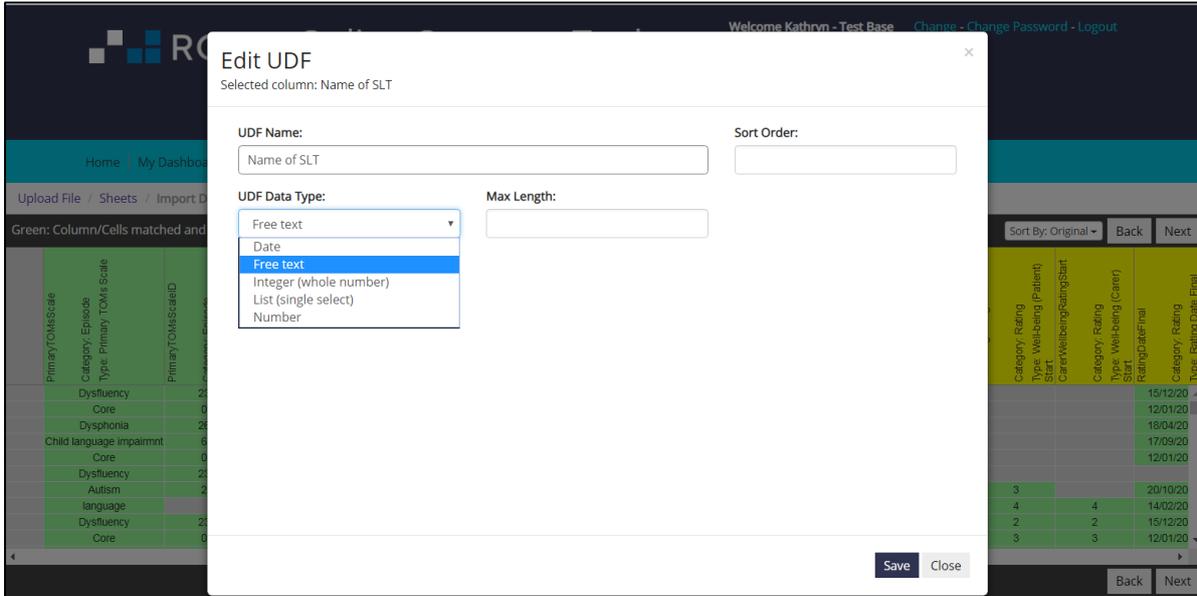
- Patient – this category is for information that is collected about a patient once only, and does not vary. For example, date of admission, patient ID.
- Episode – this category is for information that is collected about a specific episode of care. There will be one value per episode of care. Examples include: total number of contacts, setting(s) in which the intervention was delivered, the type of intervention(s). This is the most common type of category.
- Rating – this category is for information that is collected each time a TOMs rating is made. It may be something that accumulates across the episode of care, such as 'number of contacts since the last rating', or information that compliments the rating, such as an additional measure of risk or confidence.

7c. In the drop-down box called 'type', select 'Create UDF'.



7d. You will be asked to verify the name of the column and allocate the type of field.

- Date – this type of field will always be in date format (i.e. DD/MM/YYYY)
- Free text – this type of field will allow text/narrative containing any characters
- Integer (whole number) – this type of field will always be a whole number
- List (single select) – this type of field will contain values from a list of discrete options. These options may change over time.
- Number – this type of field will contain numerical values that are not whole numbers (i.e. with decimal places)



Please refer to Annex 4 for examples.

Step eight: Matching values in a user defined field that has previously been created

8a. Once you have created a 'user defined field', the next time that you upload a file, the ROOT may be able to automatically detect the type of user defined field. Alternatively, you may need to click on the column heading and then select the type of field from the 'Existing UDF' list:

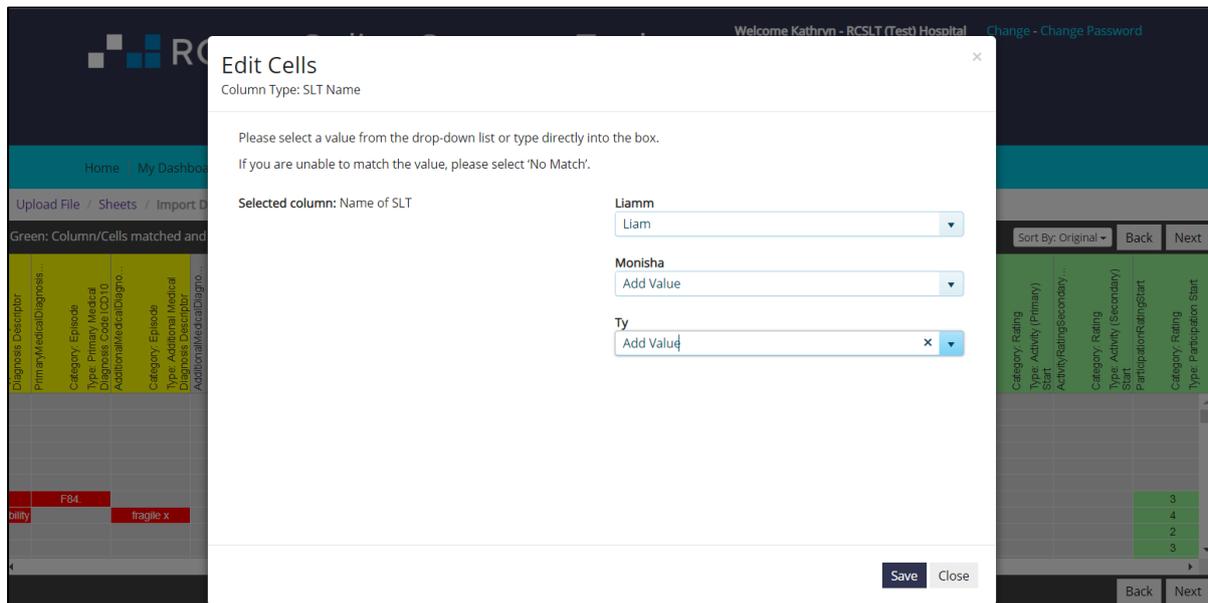
8b. If the column turns yellow, this means that there are values in the column that cannot be automatically mapped. For the following field types, follow the instructions in step 6 about mapping values:

- Date
- Free text
- Integer (whole number)
- Number

For single select fields, please follow these steps:

8c. Click on the column heading and select 'Match Cells'.

8d. You will be provided with the option of adding new values to the list, or mapping the cells to existing values:



8e. Click 'save'. The column heading will turn green if the matching is complete.

Step 9: Importing and import preview

9a. Once all mapping is complete, the sheet should appear green and grey. Then click 'next'.

The screenshot shows the 'Therapy Outcome Measures' interface. At the top, it says 'Welcome Kathryn - Test' and 'Change - Change Password - Logout'. Below the navigation bar, there's a breadcrumb trail: 'Upload File / Sheets / Import Data for: RCSLT Outcomes Database Template - episode per row - to upload v2.xlsx (Template)'. A status bar indicates: 'Green: Column/Cells matched and accepted Yellow: Column matched Orange: Column not matched Grey: Ignored or Empty'. A 'Sort By: Original' dropdown and 'Back' and 'Next' buttons are visible. The main table has columns for various metrics like 'Primary TOMs Scale', 'Secondary TOMs Scale', 'Rating', 'Date Start', etc. The rows are color-coded: green for columns that are matched and accepted, yellow for matched but with missing cells, orange for not matched, and grey for ignored or empty.

9b. You will be presented with a summary sheet, containing the following headings:

- Column types
- Green columns for import
- Yellow columns for import (some cells missing)
- Orange columns (not for import)
- Ignored columns
- Cells not matched
- Complete episodes
- Invalid episodes

The screenshot shows the 'Import Preview' screen. It has the same header as the previous screenshot. Below the breadcrumb trail, there's a yellow box with the text: 'Please check this carefully. As what is on this screen will be used to import the data.' Below this, there's a list of column types with expandable sections:

- + Column Types (34)
- + Green columns for import (30)
- + Yellow columns for import (some cells missing) (3)
- + Orange columns (not for import) (0)
- + Ignored columns (4)
- + Cells not matched (3)
- + Complete Episodes (6)
- + Invalid Episodes (2)

The number in brackets following the heading indicates the number in the sheet. You can expand each heading to view further information.

9c. Click on 'column types' to display a summary of the columns that have been mapped. The first step is to check that there are no errors.

Type	Column Name(s)
Patient ID	1: LocalPatientIdentifier
Year of birth	1: YearOfBirth
Gender	1: Gender
SLT Diagnosis	1: PrimaryCommunicationSwallowingDisorderDescriptor
SLT Diagnosis ICD10 Code	1: PrimaryCommunicationSwallowingDisorderCodeICD10/11
Primary Diagnosis	1: PrimaryMedicalDiagnosisDescriptor
Primary ICD10 Code	1: PrimaryMedicalDiagnosisCodeICD10/11
Secondary Diagnosis	1: AdditionalMedicalDiagnosisDescriptor
Secondary Diagnosis ICD10 Code	1: AdditionalMedicalDiagnosisCodeICD10/11
Primary TOMs Scale	1: PrimaryTOMsScale
Primary TOMs Scale ID	1: PrimaryTOMsScaleID
Secondary TOMs Scale	1: SecondaryTOMsScale
Secondary TOMs Scale ID	1: SecondaryTOMsScaleID
Rating Date Start	1: RatingDateStart
Impairment (Primary) Start	1: ImpairmentRatingPrimaryStart
Impairment (Secondary) Start	1: ImpairmentRatingSecondaryStart
Activity (Primary) Start	1: ActivityRatingPrimaryStart

If any columns have been mapped incorrectly, click 'back' and make the correction to the sheet.

9d. Click on the following drop-down menus to show more detailed information:

- Green columns for import - a summary of the columns for which all values can be imported
- Yellow columns for import (some cells missing) - columns that can be imported, but not all values will be imported
- Orange columns (not for import) - a list of columns that cannot be imported because they have been neither 'matched' nor 'ignored'. If you do wish to import these columns, click 'back' to assign the correct descriptions.
- Ignored columns - shows a list of columns that will not be imported
- Cells not matched – cells that remain 'red' on the spreadsheet and cannot be imported
- Complete episodes – the total number of episodes that can be imported
- Invalid episodes – the number of episodes that cannot be imported. Selecting this option will display the reasons why.

Import Preview

Please check this carefully.
As what is on this screen will be used to import the data.

- + Column Types (34)
- + Green columns for import (30)
- + Yellow columns for import (some cells missing) (3)
- + Orange columns (not for import) (0)
- + Ignored columns (4)
- + Cells not matched (3)
- + Complete Episodes (6)
- + Invalid Episodes (2)

9e. If you wish to make any changes, click 'back', otherwise click 'next'.

Step 10: Choose another sheet

10a. If you wish to import another sheet in the workbook, please select the appropriate one and complete steps 2-9. Otherwise the import is complete.

The screenshot shows the RCSLT Online Outcome Tool interface. At the top, it says 'RCSLT Online Outcome Tool' and 'Therapy Outcome Measures'. Below this is a navigation bar with links: Home, My Dashboard, Patients, Reports, Resources, Secure File Upload, Import Data, Admin, and Site Admin. The main content area shows a breadcrumb trail: Upload File / Sheets / Import Data for: RCSLT Outcomes Database Template - episode per row - with UDF - Jan 2019.xlsx. Below this is a table with the following data:

Sheet Name	Status	Date	Actions
Template	Completed	18 Jan 2019	Re-import
	In Progress	18 Jan 2019	
	Not Started	18 Jan 2019	
LookUps	Not Started	18 Jan 2019	Import
Reference Cells	Not Started	18 Jan 2019	Import

Annex 1: Types of columns in the 'episode per row' file structure

Category	Type	Description
Patient	Local Patient Identifier	This is a local patient identifier and can take any alpha numeric form.
	Year Of Birth	The year of the patient's birth
	Gender	The patient's gender
Episode	Primary Communication and Swallowing Disorder Descriptor/Code	The descriptor and/or ICD-10 code for the patient's primary communication/swallowing disorder
	Additional Communication and Swallowing Disorder Descriptor(s)/Code(s)	The descriptor(s) and/or ICD-10 code(s) for any additional communication/swallowing disorder(s)
	Primary Medical Diagnosis Descriptor/Code	The descriptor and ICD-10 code for the primary medical diagnosis , where relevant
	Additional Medical Diagnosis Descriptor(s)/Code(s)	The descriptor(s) and ICD-10 code(s) for any additional medical diagnoses, where relevant
	Primary TOMs Scale	The name of the TOMs scale (adapted and core) that was used to rate the patient from the 3rd edition of the book:- 'Therapy Outcome Measures for Rehabilitation Professionals' Pam Enderby and Alexandra John, 2015 – ISBN 978 – 907826 – 29 - 0
	Primary TOMs Scale ID	The identifying number of the TOMS scale used from the 3rd edition of the book:- 'Therapy Outcome Measures for Rehabilitation Professionals' Pam Enderby and Alexandra John, 2015 – ISBN 978 – 907826 – 29 – 0 (The Core Scale is coded as 0 (zero))
	Secondary TOMs Scale	The name of the primary TOMs scale (adapted and core) that was used to rate the patient from the 3rd edition of the book:- 'Therapy Outcome Measures for Rehabilitation Professionals' Pam Enderby and Alexandra John, 2015 – ISBN 978 – 907826 – 29 - 0
	Secondary TOMs Scale ID	The identifying number of the TOMS scale used from the 3rd edition of the book:- 'Therapy Outcome Measures for Rehabilitation Professionals' Pam Enderby and Alexandra John, 2015 – ISBN 978 – 907826 – 29 – 0 (The Core Scale is coded as 0 (zero))
	End-of-episode/Discharge Code/Description	Free text description of the reason for the end of the episode/discharge (e.g. therapy complete, did not attend)
Rating	Rating Date – start of episode	The date the first TOMS rating was made
	Rating Date – end of episode	The date the final TOMS rating was made
	Impairment Score (Primary) – start of episode²	Numerical value for the TOMs score for the impairment domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the

² For SLT services using the AAC adapted scale, the TOMs domains are: Impairment (physical), Impairment (cognitive), Impairment (sensory), Impairment (speech and language output) Impairment (comprehension), Activity, Participation, Wellbeing, Carer-wellbeing (optional).

Category	Type	Description
	Impairment Score (Primary) – end of episode	normal end of the scale) Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Impairment Score (Secondary) – start of episode	Numerical value for the TOMs score for the impairment domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale)
	Impairment Score (Secondary) – end of episode	Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Activity Score (Primary) – start of episode	Numerical value for the TOMs score for the activity domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale)
	Activity Score (Primary) – end of episode	Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Activity Score (Secondary) – start of episode	Numerical value for the TOMs score for the activity domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale)
	Activity Score (Secondary) – end of episode	Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Participation Score – start of episode	Numerical value for the TOMs score for the participation domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale)
	Participation Score – end of episode	Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Wellbeing Score – start of episode	Numerical value for the TOMs score for the wellbeing domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale)
	Wellbeing Score – end of episode	Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Carer Wellbeing Score – start of episode	Numerical value for the TOMs score for the carer wellbeing domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale)
	Carer Wellbeing Score – end of episode	Any TOMs domains where a TOMs score is not applicable should be left blank (null).
User Defined Fields	These are data items that are deemed useful, and created by participating services. They are only available to the service that created them. They may be used to increase the value of the data to the local service by ensuring the data better matches local structures, practices and reporting requirements. As these fields are under the control of the local service, their own organisation's information governance frameworks must be adhered to.	

Annex 2: Required data fields for “rating per row” file structure

Category	Type	Description
Patient	Local Patient Identifier	This is a local patient identifier and can take any alpha numeric form.
	Year Of Birth	The year of the patient's birth
	Gender	The patient's gender
Episode	Episode of care Identifier	An episode of care identifier can take any alpha numeric form and delineates an episode of care. For the purposes of TOMs, an episode of care is a package of intervention(s) and will contain: Start of Episode ratings (S) Interim(s) ratings (I) (Optional) End of Episode ratings (E)
	Primary Communication and Swallowing Disorder Descriptor/Code	The descriptor and/or ICD-10 code for the patient's primary communication/swallowing disorder
	Additional Communication and Swallowing Disorder Descriptor(s)/Code(s)	The descriptor(s) and/or ICD-10 code(s) for any additional communication/swallowing disorder(s)
	Primary Medical Diagnosis Descriptor/Code	The descriptor and ICD-10 code for the primary medical diagnosis, where relevant
	Medical Diagnosis Descriptor(s)/Code(s)	The descriptor(s) and ICD-10 code(s) for any additional medical diagnoses, were
	Primary TOMs Scale	The name of the primary TOMs scale (adapted and core) that was used to rate the patient from the 3rd edition of the book:- 'Therapy Outcome Measures for Rehabilitation Professionals' Pam Enderby and Alexandra John, 2015 – ISBN 978 – 907826 – 29 - 0
	Primary TOMs Scale ID	The identifying number of the TOMS scale used from the 3rd edition of the book:- 'Therapy Outcome Measures for Rehabilitation Professionals' Pam Enderby and Alexandra John, 2015 – ISBN 978 – 907826 – 29 – 0 (The Core Scale is coded as 0 (zero))
	Secondary TOMs Scale	The name of the primary TOMs scale (adapted and core) that was used to rate the patient from the 3rd edition of the book:- 'Therapy Outcome Measures for Rehabilitation Professionals' Pam Enderby and Alexandra John, 2015 – ISBN 978 – 907826 – 29 - 0
	Secondary TOMs Scale ID	The identifying number of the TOMS scale used from the 3rd edition of the book:- 'Therapy Outcome Measures for Rehabilitation Professionals' Pam Enderby and Alexandra John, 2015 – ISBN 978 – 907826 – 29 – 0 (The Core Scale is coded as 0 (zero))
	End-of-episode/Discharge Code/Description	Free text description of the reason for the end of the episode/discharge (e.g. therapy complete, did not attend)
Rating	Rating Type	S = Admission/Initial Assessment/First Rating/Start of Episode

Category	Type	Description
		I = Interim/On-Going (optional) F= End of Episode/Final Rating/Discharge
	Rating Date	The date the TOMs rating was made
	Impairment Score (Primary)³	Numerical value for the TOMs score for the impairment domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale) Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Impairment Score (Secondary)	Numerical value for the TOMs score for the impairment domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale) Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Activity Score (Primary)	Numerical value for the TOMs score for the activity domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale) Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Activity Score (Secondary)	Numerical value for the TOMs score for the activity domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale) Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Participation Score	Numerical value for the TOMs score for the participation domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale) Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Wellbeing Score	Numerical value for the TOMs score for the wellbeing domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale) Any TOMs domains where a TOMs score is not applicable should be left blank (null).
	Carer Rating Score	Numerical value for the TOMs score for the carer wellbeing domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale)

³ For SLT services using the AAC adapted scale, the TOMs domains are: Impairment (physical), Impairment (cognitive), Impairment (sensory), Impairment (speech and language output) Impairment (comprehension), Activity, Participation, Wellbeing, Carer-wellbeing (optional).

Category	Type	Description
		Any TOMs domains where a TOMs score is not applicable should be left blank (null).
User Defined Fields		These are data items that are deemed useful, and created by participating services. They are only available to the service that created them. They may be used to increase the value of the data to the local service by ensuring the data better matches local structures, practices and reporting requirements. As these fields are under the control of the local service, their own organisation's information governance frameworks must be adhered to.

Annex 3: Required data fields for “score per row” file structure

Category	Type	Description
Patient	Local Patient Identifier	This is a local patient identifier and can take any alpha numeric form.
	Year Of Birth	The year of the patient's birth
	Gender	The patient's gender
Episode	Episode of care Identifier	An episode of care identifier can take any alpha numeric form and delineates an episode of care. For the purposes of TOMs, an episode of care is a package of intervention(s) and will contain: Start of Episode ratings (S) Interim(s) ratings (I) (Optional) End of Episode ratings (E)
	Primary Communication and Swallowing Disorder Descriptor/Code	The descriptor and/or ICD-10 code for the patient's primary communication/swallowing disorder
	Additional Communication and Swallowing Disorder Descriptor(s)/Code(s)	The descriptor(s) and/or ICD-10 code(s) for any additional communication/swallowing disorder(s)
	Primary Medical Diagnosis Descriptor/Code	The descriptor(s) and ICD-10 code(s) for any primary medical diagnosis, where relevant
	Additional Medical Diagnosis Descriptor(s)/Code(s)	The descriptor(s) and ICD-10 code(s) for any additional medical diagnoses, where relevant
	TOMs Scale Primary/Secondary	This indicates whether the TOMs scale is 'primary' or 'secondary'
	TOMs Scale	The name of the TOMs scale (adapted and core) that was used to rate the patient from the 3rd edition of the book:- 'Therapy Outcome Measures for Rehabilitation Professionals' Pam Enderby and Alexandra John, 2015 – ISBN 978 – 907826 – 29 – 0
	TOMs Scale ID	The identifying number of the TOMS scale used from the 3rd edition of the book:- 'Therapy Outcome Measures for Rehabilitation Professionals' Pam Enderby and Alexandra John, 2015 – ISBN 978 – 907826 – 29 – 0 (The Core Scale is coded as 0 (zero))
	End-of-episode/Discharge Code/Description	Free text description of the reason for the end of the episode/discharge (e.g. therapy complete, did not attend)
Rating	Rating ID	A rating identifier can take any alpha numeric form. For the purposes of TOMs, a rating is a single set of scores collected across the domains of TOMs at a single point in time and will contain scores for: Impairment (primary/secondary) Activity (primary/secondary) Participation Wellbeing Carer Wellbeing – optional
	Rating Type	S = Admission/Initial Assessment/First Rating/Start

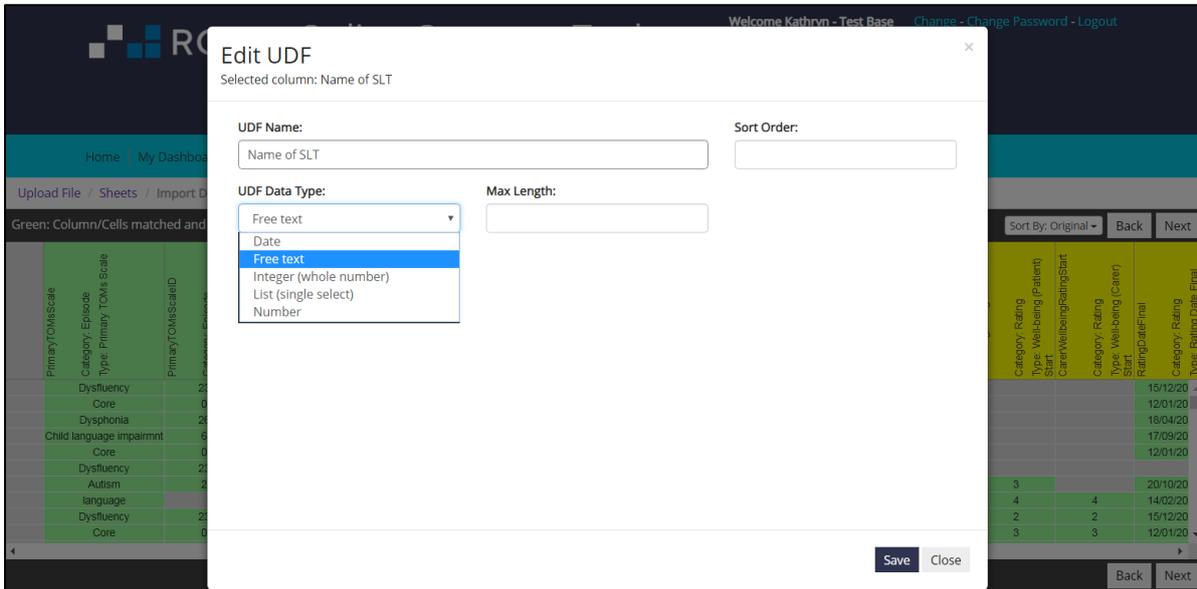
Category	Type	Description
		of Episode I = Interim/On-Going (optional) F= End of Episode/Final Rating/Discharge
	Rating Date	The date the TOMs ratings was made
	TOMs Domain⁴	The domain of the TOMs being scored: Impairment (Primary) Impairment (Secondary) – optional Activity (Primary) Activity (Secondary) – optional Participation Wellbeing Carer Wellbeing – optional
	TOMs score	Numerical value for the TOMs score for the domain: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, 5 (Zero is the severe / profound end of the scale, five is the normal end of the scale) Any TOMs domains where a TOMs score is not applicable should be left blank (null).
User Defined Fields		These are data items that are deemed useful, and created by participating services. They are only available to the service that created them. They may be used to increase the value of the data to the local service by ensuring the data better matches local structures, practices and reporting requirements. As these fields are under the control of the local service, their own organisation's information governance frameworks must be adhered to.

⁴ For SLT services using the AAC adapted scale, the TOMs domains are: Impairment (physical), Impairment (cognitive), Impairment (sensory), Impairment (speech and language output) Impairment (comprehension), Activity, Participation, Wellbeing, Carer-wellbeing (optional).

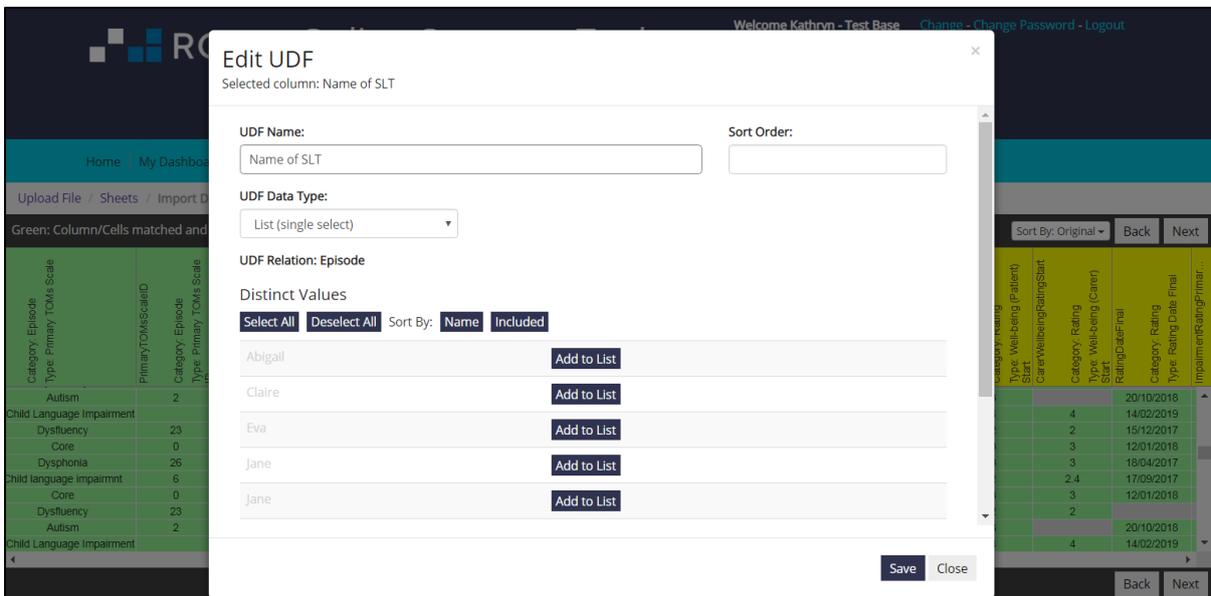
Annex 4: Setting up user defined fields – examples

EXAMPLE 1 – setting up a ‘single select’ field (name of SLT)

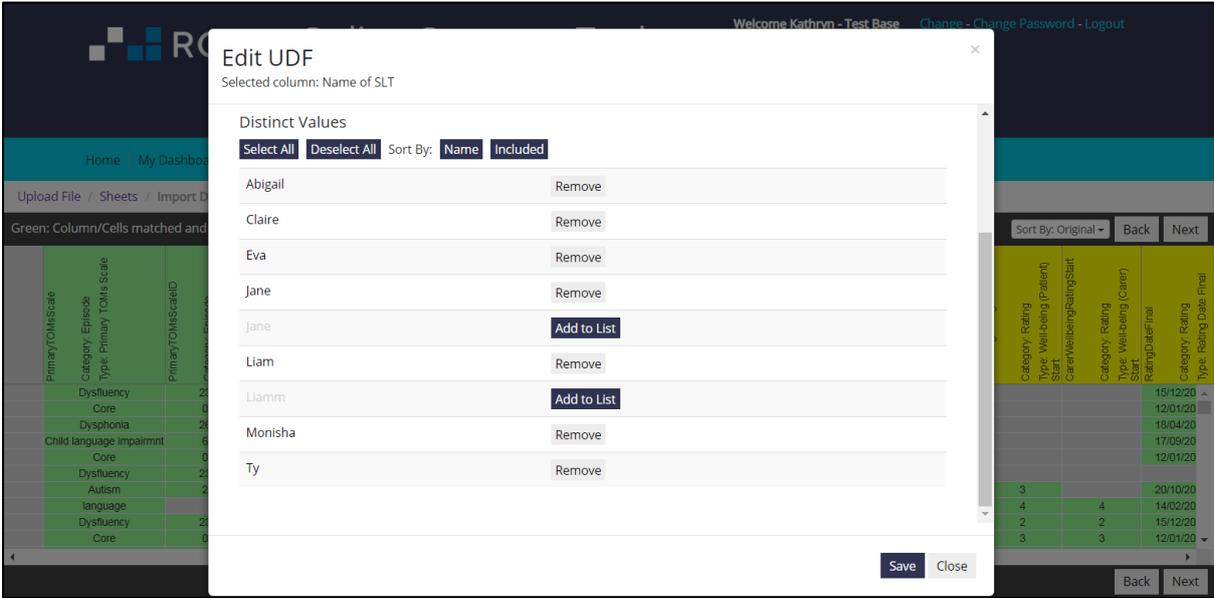
7.1.a. Check that the user defined field is correctly named, and select the type as ‘single select’:



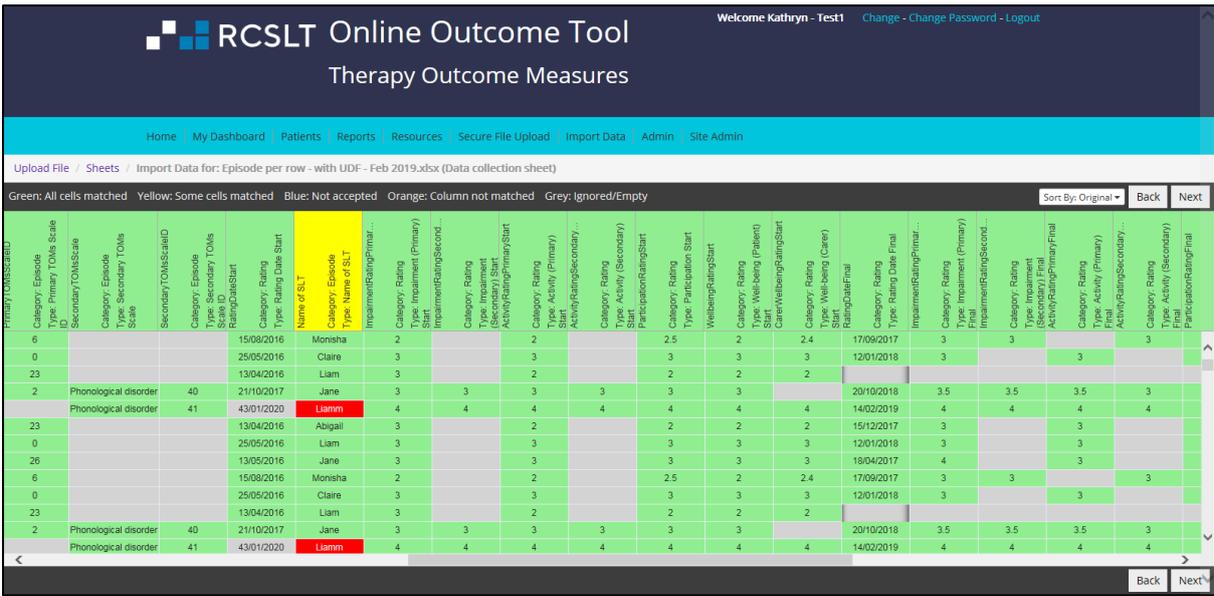
7.1.b. The ROOT will detect the values in the column and ask you to confirm which values are ‘allowed’. To add ‘allowed’ values, click ‘select all’ or ‘add to list’ against the relevant values.



7.1.c. You may not add all values to the list, for example, if there are instances of the value spelled incorrectly, or duplicate values with minor differences. When you have added all of the allowed values to the list, click ‘save’.



7.1.d. If the column heading remains yellow, it will be because there are erroneous or unmatched values in the column:



7.1.e. Click the column heading again and click Match Cells:

The screenshot shows the RCSLT Online Outcome Tool interface. A dialog box titled "Name of SLT" is open, prompting the user to change a mapping by selecting from drop-down boxes. The dialog includes a "Category" dropdown set to "Episode" and a "Type" dropdown set to "Name of SLT". Below the dropdowns are buttons for "Match Cells", "Reset", and "Ignore".

The background shows a data table with columns for various metrics and rows for different participants. The "Name of SLT" column is highlighted in yellow, and the value "Liamm" is visible in red text in the highlighted cell.

7.1.f. For any unmatched values, select the correct value from the drop-down list. If the value cannot be matched, select 'No Match'. Then click 'save'.

The screenshot shows the RCSLT Online Outcome Tool interface with an "Edit Cells" dialog box open. The dialog box is titled "Edit Cells" and has a subtitle "Column Type: Name of SLT". It contains instructions: "Please select a value from the drop-down list or type directly into the box. If you are unable to match the value, please select 'No Match'." Below the instructions, it says "Selected column: Name of SLT".

A dropdown list is open, showing a list of names: "Liamm", "Abigail", "Claire", "Eva", "Jane", "Liam", "Monisha", and "Ty". The name "Liamm" is currently selected and highlighted in blue.

At the bottom of the dialog box are "Save" and "Close" buttons.

7.2.c. Click 'save'.

7.2.d. If all values are integers, the column heading will turn green:

Type: Wellbeing (Carer)	Rating Start	Rating Date Final	Category: Rating	Type: Rating Date Final	Impairment Rating Primary	Category: Rating	Type: Impairment (Primary) Final	Impairment Rating Secondary	Category: Rating	Type: Impairment (Secondary) Final	Activity Rating Primary Final	Category: Rating	Type: Activity (Primary) Final	Activity Rating Secondary	Category: Rating	Type: Activity (Secondary) Final	Participant Rating Final	Category: Rating	Type: Participation Final	Wellbeing Rating Final	Category: Rating	Type: Well-being (Patient) Final	Carer Wellbeing Rating Final	Category: Rating	Type: Well-being (Carer) Final	Total number of contacts	Category: Episode	Type: Total number of contacts	Discharge Code	Category: Episode	Type: Discharge Code	No Title	Number of contacts	Category: Rating	Type: Activity (Primary) Start	Direct time	Category: Type	Indirect time	Category: Rating	Type: Activity (Primary) Start	Total time	Category: Type								
	15/12/2017		3			3					3				3		3		3		3		3		3	6	U		6		6	240	120	360		6	240	120	360		6	240	120	360		6	240	120	360	
	12/01/2018		3			3					3				3		3		3		3		3		3	7	TC		6		6	240	120	360		6	240	120	360		6	240	120	360						
	18/04/2017		4			3					3				3		3		3		3		3		3	5	IAS		6		6	240	120	360		6	240	120	360		6	240	120	360						
	17/09/2017		3		3				3						3		3		3		3		3		3	2	DNA		6		6	240	120	360		6	240	120	360		6	240	120	360						
	12/01/2018		3			3					3				3		3		3		3		3		3	8	EEOC		6		6	240	120	360		6	240	120	360		6	240	120	360						
	20/10/2018		3.5			3.5					3.5				3		3.5		3		3		3		3	8	D		6		6	240	120	360		6	240	120	360		6	240	120	360						
	14/02/2019		4			4					4				4		4		4		4		4		4	4	DNA		6		6	240	120	360		6	240	120	360		6	240	120	360						
	15/12/2017		3			3					3				3		3		3		3		3		3	6	U		6		6	240	120	360		6	240	120	360		6	240	120	360						
	12/01/2018		3			3					3				3		3		3		3		3		3	7	TC		6		6	240	120	360		6	240	120	360		6	240	120	360						

7.2.e. If the ROOT detects any erroneous values, the column will remain yellow:

Welcome Kathryn - Test [Change](#) - [Change Password](#) - [Logout](#)

Therapy Outcome Measures

Home | My Dashboard | Patients | Reports | Resources | Secure File Upload | Import Data | Admin | Site Admin

Upload File / Sheets / Import Data for: Test file with UDF and errors v2.xlsx (Data collection sheet)

Green: Column/Cells matched and accepted Yellow: Column matched Orange: Column not matched Grey: Ignored or Empty

Sort By: Original Back Next

Type: Impairment (Primary/Final)	Category: Rating	Activity: Rating (Primary/Final)	Activity: Rating (Secondary)	Participation: Rating (Final)	Wellbeing: Rating (Final)	Wellbeing: Rating (Patient/Carer)	Category: Rating	Type: Total number of contacts	Type: Discharge Code	No Title	Number of contacts	Direct time	Category: Episode	Type: Direct time	Indirect time	Total time	Person delivering	Care spell
								6	U		6	240		120		360	SLT	1
								6	TC		6	240		120		360	SLT	2
								6	TAS		6	240		120		360	SLT	3
3			3					6	DNA		6	240		120		360	SLT	a
								6	EEOC		6	240		120		360	SLT	4
								6	D		6	d		c	#VALUE!	SLT	5	
3.5	3.5		3	3.5	3	3	3	6	MOA		6	240		120		360	SLTA	6
4	4		4	4	4	4	4	6	DNA		6	240		120		360	SLT	a
								6	U		6	240		120		360	SLTA	7
								7	TC		6	240		120		360	SLT	8

7.2.f. Follow steps in section 6, about matching values by clicking on the column heading and selecting 'match cells':

Welcome Kathryn - Test [Change](#) - [Change Password](#) - [Logout](#)

Therapy Outcome Measures

Home | My Dashboard | Patients | Reports | Resources | Secure File Upload | Import Data | Admin | Site Admin

Upload File / Sheets / Import Data for: Test file with UDF and errors v2.xlsx (Data collection sheet)

Green: Column/Cells matched and accepted Yellow: Column matched Orange: Column not matched Grey: Ignored or Empty

Sort By: Original Back Next

Direct time Accepted

To change this mapping, please select from the drop-down boxes:

Category: Episode

Type: Direct time

Match Cells Reset Ignore

Type: Impairment (Primary/Final)	Category: Rating	Activity: Rating (Primary/Final)	Activity: Rating (Secondary)	Participation: Rating (Final)	Wellbeing: Rating (Final)	Wellbeing: Rating (Patient/Carer)	Category: Rating	Type: Total number of contacts	Type: Discharge Code	No Title	Number of contacts	Direct time	Category: Episode	Type: Direct time	Indirect time	Total time	Person delivering	Care spell
								6	U		6	240		120		360	SLT	1
								6	TC		6	240		120		360	SLT	2
								6	TAS		6	240		120		360	SLT	3
3			3					6	DNA		6	240		120		360	SLT	a
								6	EEOC		6	240		120		360	SLT	4
								6	D		6	d		c	#VALUE!	SLT	5	
3.5	3.5		3	3.5	3	3	3	6	MOA		6	240		120		360	SLTA	6
4	4		4	4	4	4	4	6	DNA		6	240		120		360	SLT	a
								6	U		6	240		120		360	SLTA	7
								7	TC		6	240		120		360	SLT	8