

How to use “HCH Matcher” Excel Spreadsheet

Checking if potential Health Care Homes patients have had a Health Care Homes certificate created

Before getting started: Creating Health Care Homes patients lists

Lists of “Potential Health Care Homes Patients” and “Patients with HCH Certificates” can be generated via the Precedence Connector software. Instructions on how to create these lists can be found in the [Health Care Home Risk Stratification Tool User guide](#).

You must have both a current **Potential HCH Patients** list, and a current **HCH Patients with Certificates** list before using the **HCH Matcher** Excel spreadsheet template.

Step 1: Copying the Potential Patients list into the template

1. To begin, open the **HCH Matcher** Excel template.
2. In separate Excel windows, open both your **Potential HCH Patients** list, and your **HCH Patients with Certificates** list.
3. In your **Potential HCH Patients** list, highlight all listed patients across the first four columns (First name, Last Name, Gender, and Date of birth). With this section highlighted, right click, and select copy (**Fig. 1**).
4. Now enter the **HCH Matcher** window. Ensure you are on the first sheet, titled **PotentialHCHPatients**. Right click on the first available cell under first name, and select paste. (**Fig. 2**).

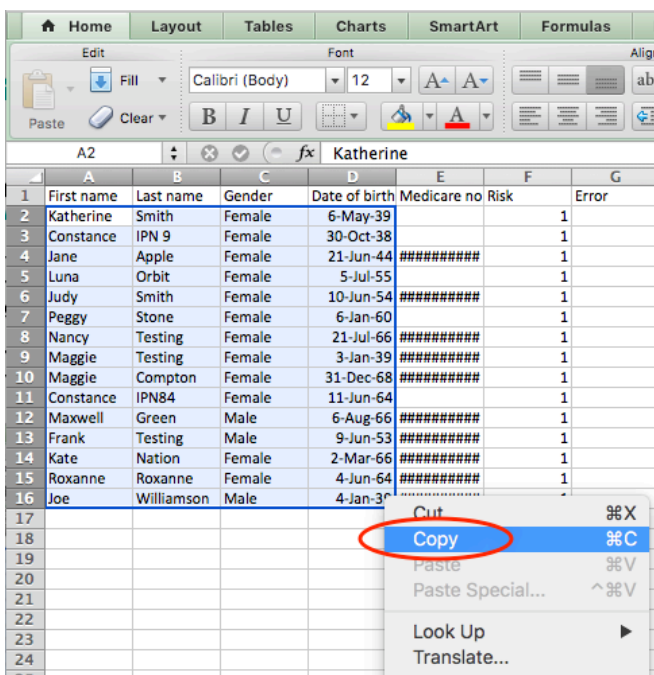


Figure 1: Copying Potential Patients

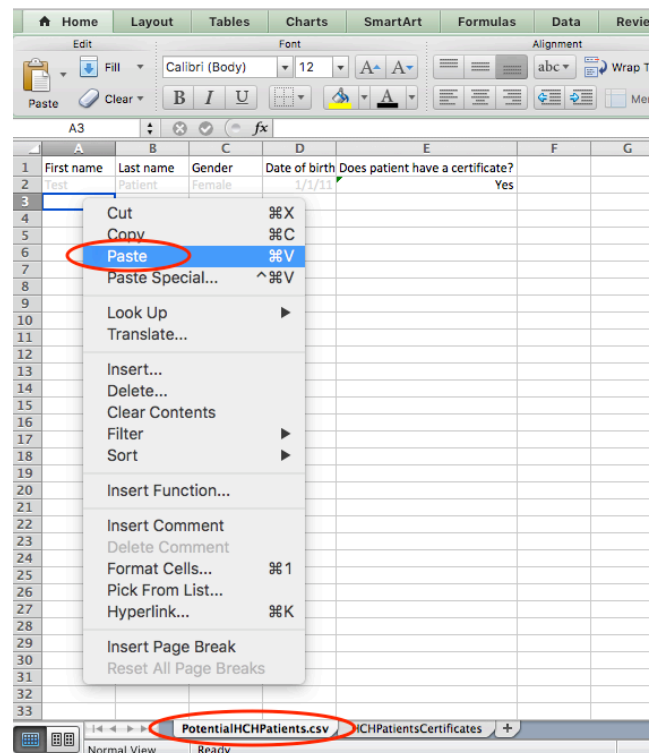


Figure 2: Pasting potential patients list

Step 2: Copying the Patients with Certificates list into the template

1. To finalise the **HCH Matcher** table, you now complete a similar step using your **HCH Patients with Certificates** list.
2. In your **HCH Patients with Certificates** list, highlight all listed patients across the first four columns (First name, Last Name, Gender, and Date of birth). With this section highlighted, right click, and select copy (**Fig. 3**).
3. Now enter the **HCH Matcher** window. Ensure you are on the second sheet, titled **HCHPatientsCertificates**. Right click on the first available cell under first name, and select paste. (**Fig. 4**).

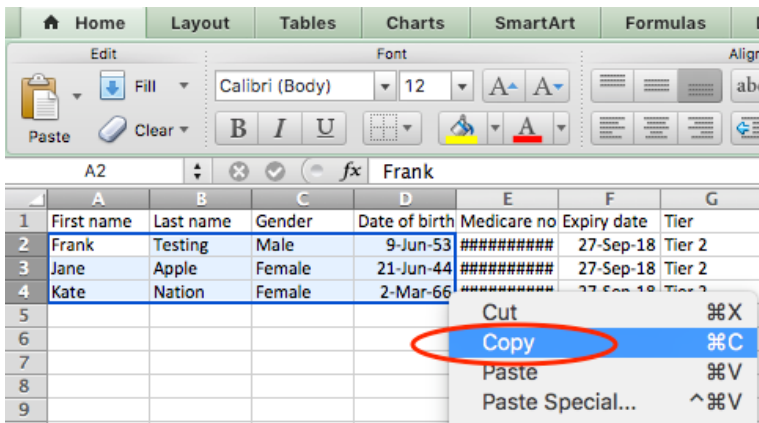


Figure 3: Send Referral

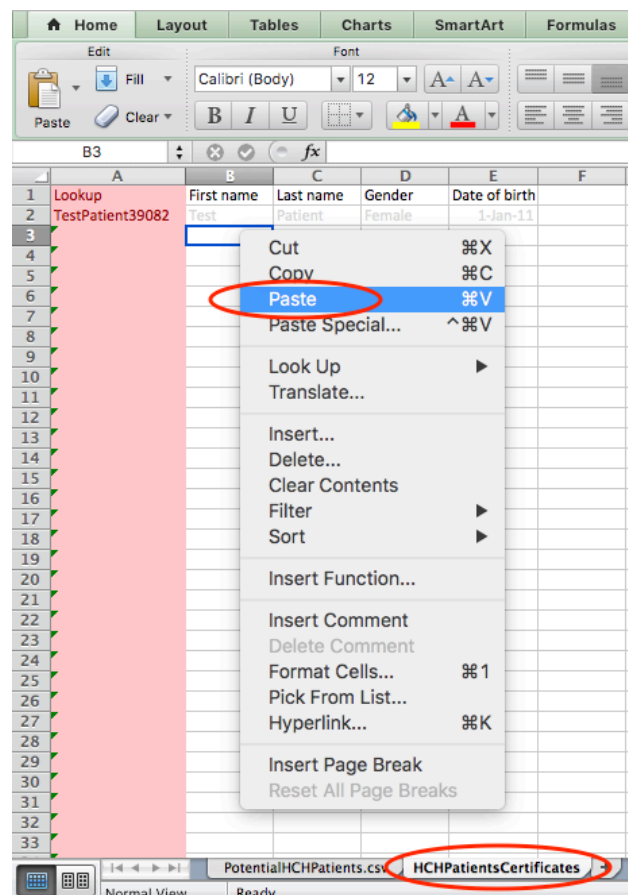


Figure 4: Confirm Details

Step 3: Viewing Potential Patients who have had a HCH Certificate created

To view your list of potential patients who have a certificate created, click back to the first sheet, titled **PotentialHCHPatients** in the **HCH Matcher** table.

You may now see all matched patients will display a "Yes" value in the final column titled **"Does patient have a certificate?"** (Fig. 5).

To view potential patients without a certificate even faster, you may sort this column in ascending order, or apply a filter to only show "No" results.

	A	B	C	D	E	F
1	First name	Last name	Gender	Date of birth	Does patient have a certificate?	
2	Test	Patient	Female	1/1/11	Yes	
3	Katherine	Smith	Female	6-May-39	No	
4	Constance	IPN 9	Female	30-Oct-38	No	
5	Jane	Apple	Female	21-Jun-44	Yes	←
6	Luna	Orbit	Female	5-Jul-55	No	
7	Judy	Smith	Female	10-Jun-54	No	
8	Peggy	Stone	Female	6-Jan-60	No	
9	Nancy	Testing	Female	21-Jul-66	No	
10	Maggie	Testing	Female	3-Jan-39	No	
11	Maggie	Compton	Female	31-Dec-68	No	
12	Constance	IPN84	Female	11-Jun-64	No	
13	Maxwell	Green	Male	6-Aug-66	No	
14	Frank	Testing	Male	9-Jun-53	Yes	←
15	Kate	Nation	Female	2-Mar-66	Yes	←
16	Roxanne	Roxanne	Female	4-Jun-64	No	
17	Joe	Williamson	Male	4-Jan-39	No	
18					Yes	
19					Yes	
20					Yes	
21					Yes	
22					Yes	
23					Yes	
24					Yes	
25					Yes	
26					Yes	
27					Yes	
28					Yes	
29					Yes	
30					Yes	
31					Yes	
32					Yes	
33					Yes	

Figure 5: Generate list