

# TB PHIMS 3.3 User's Manual

A Step-by-Step Guide to Entering and  
Managing Infectious Disease Data

February 2009

## TB PHIMS User Guide

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## TB PHIMS User Guide

(text in *italic font* are PHIMS screens, fields or functions)

### Accessing TB in PHIMS

The PHIMS TB application is accessible from the Washington Transact menu. If a user has already been assigned access to other notifiable conditions, then the LHJ Data Steward will need to submit an updated account management form (WAM) to the DOH Informatics, Customer Support Unit for access.

Please be aware that there are significant differences in the PHIMS screens and some of the functionality between TB and other notifiable conditions. These differences are related to the new TB Report of Verified Case of Tuberculosis (RVCT) form that was implemented by the CDC in 2008

Once a user has signed onto the Washington Transact website with a digital certificate and clicked on PHIMS, the main menu will appear.

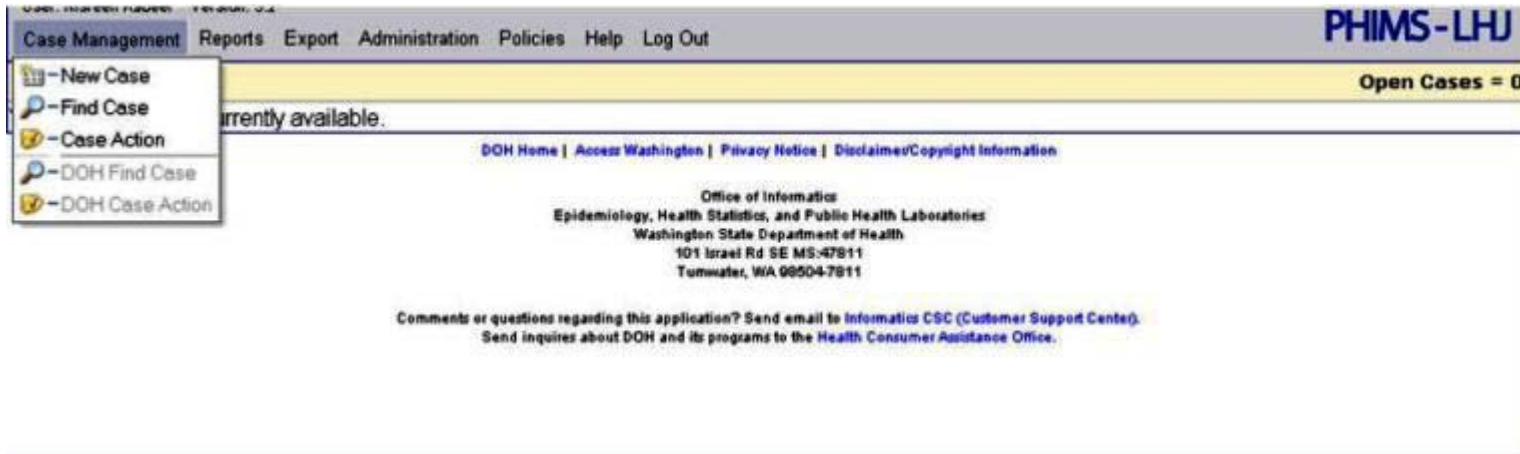
### PHIMS Main Menu



The screenshot shows the PHIMS Main Menu interface. At the top left is the Washington State Department of Health logo. Below the logo, the user information is displayed: "User: Jim Schlatter Version: 3.0". A navigation menu follows with the following items: "Case Management", "Reports", "Export", "Administration", "Policies", "Help", and "Log Out". Below the navigation menu is a section titled "Case Action" with a yellow background. The text in this section reads: "You have no cases currently available."

**Entering a case** – new case information is entered using the *New Case* and *Data Entry* screens.

- 1) Access the *New Case* screen from the *Case Management* menu.
- 2) Click on *New Case*



- 3) Once the *New Case* screen opens complete the information required. Required fields are indicated by a red asterisk to the right of the field (required means you cannot leave the field blank). Please remember that date fields throughout PHIMS require leading zeros (e.g. 02/01/2009). See Table 1 for required field definitions
- 4) After the initial case information is entered, click the *Create New Record* button on the top right hand corner of the screen. **Do not press Enter, you must click the on “Create New Record” button.**

A screenshot of the 'New Case' data entry form. The title bar says 'New Case' and there are 'Create New Record' and 'Cancel' buttons in the top right. A blue instruction reads: 'Please provide the initial information about the record.' A note says: '(\* indicates a required field.)'. The form fields are: 'Accountable LHJ:' with a dropdown menu showing 'Spokane' and a red asterisk; 'Condition:' with a dropdown menu showing 'Tuberculosis' and a red asterisk; 'Investigator:' with a dropdown menu showing 'Cotey, Andrea' and a red asterisk; 'Last Name:', 'First Name:', and 'Middle Name:' each with an empty text input field; 'Birth Date:' with an empty date input field; and 'Date Reported' with an empty date input field and a red asterisk.

Table 1: Field Definitions for the *New Case* screen:

Field Name	Definition
Accountable LHJ	Dropdown choices listing the counties you are authorized to view. Select the jurisdiction for which the case was reported. Default is your LHJ. Required field
Condition	Dropdown choices listing the conditions you are authorized to view. Required field
Investigator	Dropdown list of names. Select your name unless you are entering a case for a different investigator. Only cases assigned to you will be visible on your Case Action screen at login. This field is only used for the initial assignment of a Case Investigator. An open case can be reassigned from the Data Entry screen. Required field
Last Name First Name Middle Name	If this person is already present in the PHIMS system either as a duplicate or for another illness -- data entry steps can be saved. <i>Make certain that you are not entering a duplicate case.</i> The name fields are not required by PHIMS. If left blank, the word "unknown" will appear in the last name field on the Case Action and Find Case screens. <b>The DOH TB Program is requiring a full name for each case of TB.</b>
Birth Date	MM/DD/YYYY
Date Reported	Date that the LHJ first suspected that the patient might have TB based on awareness via lab slip, phone, fax, or mail. Once the "date reported" field is filled in it will auto generate the same date for the "date notified" field.

**Similar Name** screen

If a similar name is already in the system, you will be alerted; if this is not the same person, then click “Create a New Case for a New Person” button. If the same person is already in the system, check to see if the case information was previously entered by clicking on “Cancel (Go to Find Case) button.” If the person is in the system but this is a new case investigation then click on “Create a New Case for THIS Person.” button.

User: [unreadable] Version: 3.4

Case Management Reports Export Administration Policies Help Log Out

**PHIMS-LHU**

**People with similar names were found. Would you like to**

**OR use one of the following:**

Name	Birth Date	Gender	Alias	County of Residence	
Smith Don					<input type="button" value="Create a New Case for THIS Person"/>

**Entering Case Information on the RVCT Data Entry** screen - see the CDC “RVCT Manual” on the WA DOH TB webpage at <http://www.doh.wa.gov/cfh/TB/RVCTmanual.pdf> for field definitions.

1) **Case banner**- displayed above the RVCT screen and includes some information carried over from the “New Case” screen.

<b>Case ID:</b> 53063-0901-0002	<b>Acct Jurisdiction:</b> Spokane	<b>Onset Date:</b> N/A
<b>LHJ Classification:</b> Confirmed	<b>Investigator:</b> Cotey , Andrea	<b>LHJ Notified:</b> 1/2/2008

Also included on the banner is ...

- *Case ID* (i.e. the PHIMS ID). This number is required by PHIMS to uniquely identify the patient. It can be used in written correspondence as it does not contain identifiable information. The first set of numbers (53063) is the state and county identifier; (0901) is the month and year the case was entered; (0002) is a sequential number.
- *LHJ Notified* is the date the LHJ was first notified about the case.
- *LHJ classification* is a required field for other conditions collected in PHIMS (i.e. pertussis, salmonella). Below is the crosswalk matching the TB Case Verification Status field and the classifications used for other PHIMS conditions.

#### Crosswalk from “Case Verification” to “Case classification” fields

Case Verification	Case Classification
0 – not a verified case	ruled out
1 – positive culture	confirmed
1a – positive NAA	confirmed
2 – positive smear/tissue	confirmed
3 – clinical case definition	confirmed
4 – verified by provider diagnosis	confirmed
5 – suspect	suspect

2) **Data Entry Screen layout** - the *RVCT Data Entry* screen is designed to closely match the CDC RVCT reporting form (<http://www.doh.wa.gov/cfh/TB/RVCTForm.pdf> ) for more convenient and accurate data entry. The *RVCT Data Entry* screen is one long scrollable screen. Some fields are grayed out and information will be entered by the DOH TB Program staff. All information on the screen is viewable by both the LHJ and DOH as long as you have been given security access permissions. DOH is able to enter and edit all fields except for “State Case Number” and “Date Submitted” since these fields are auto generated by the PHIMS system. If you have questions about RVCT content please call Kim Field at 360-236-3447; if you have questions about using PHIMS-TB please call Nola Burgess at (360) 236-4266

**3) Using the Popup Toolbar and Error Messaging** - there is a popup toolbar to the right of the *RVCT Data Entry* screen which expands when you hover over it with the cursor. This toolbar moves with you as you scroll through the page. Toolbar options are:

- **SAVE** - save the case information frequently to avoid losing data.
- **Cancel** – will exit the data entry screen without saving information
- **RVCT** – will move the user to the top of the RVCT form
- **Initial Drug Susceptibilities** – will move the user to Field #38
- **Case Completion** – will move the user to Field #41

**If you receive an error message you must correct all data entry errors or your data will not be saved.** There are two types of error message warnings when the user attempts to SAVE the data:

- A red exclamation mark appears beside the field with incorrectly entered data. In addition, a red text warning message appears in two places: on the popup toolbar and at the top of the *RVCT Data Entry screen*. This warning occurs when the user has made more than one selection on an observation requiring only one answer (i.e. positive, negative, not done....or yes, no, unknown). In most cases these observations include a label “select only one” in the section.
- An error message dialogue box will appear if the user enters an invalid date (i.e. future date, bad date - 12/32/2008, incorrect date format - 1/2/09 – correct format is 01/02/2009).

#### **4) Saving your work**

Be sure to click the Save button on the popup toolbar frequently (**about every 15 minutes**) to avoid losing data. When data is changed, a message box reminds you to save.

PHIMS will time out without saving after 45 minutes. **Typing does not reset this timer and screen movement may not reset it. The only certain way to avoid a PHIMS timeout is to save the record within the timeout period.**

#### **5) Reporting County vs. Accountable Jurisdiction**

The Accountable Jurisdiction (i.e. Thurston, Spokane, King) is the county the user is associated with per the WAM submitted by an LHJ Data Steward. A case becomes associated with an “Accountable Jurisdiction” when the case is first entered on the PHIMS New Case screen, or if the case is transferred to another county and the PHIMS “Transfer” function is executed in the “Case Administration” section.

The Reporting County is a user entered field and is defined in the RVCT guideline as the patient’s residence at the time of diagnosis. Once the case has been reported to DOH via the “Report now” button, field #4 is no longer editable by the LHJ user.

#### **6) Comment fields**

The screen includes three *Comment* fields. You can enter text in the white space below the “Comments” label as shown below. You can not, however, edit previously saved comments. The most recent comment is listed at the top with the name of the person who entered the comment as well as the time and date of entry.

Comments
<p>--- Recorded Note Date: 1/8/2009 12:02:51 PM User: Andrea Cotey  This is an additional comment for demonstrating the non-editable comment field</p> <p>--- Recorded Note Date: 1/8/2009 3:01:54 PM User: Andrea Cotey  This is a demonstration of an RVCT comment field - make sure you SAVE</p>

**7) Report Now** button (see screenshot below)

When the LHJ user has completed the data entry as much as possible, it's time to notify DOH. This is done through the "Report Now" button (see screenshot directly below). The button does several things...

- Triggers an email to the DOH TB program staff that the LHJ has entered a case
- Adds the current date to the field *Date Submitted* (i.e. "DOH Visibility Date")
- Disables editing by the LHJ user (by graying out the field) of all fields which are used in determining the case verification status.
- **\*Note: If the user clicks the button prematurely contact the DOH TB Program staff who can update the information for you.**
- Disables editing of the *Reporting Address* fields (RVCT item 4)
- Generates the *State Case Number* (RVCT item 3)

Report of Verified Case of Tuberculosis		
<b>Report Now</b>	<b>Case Verification</b>	Current Verification Status: Verified by Provider Diagnosis
Last reported to DOH	Verification Status	<input type="text"/>
<b>Last Name</b>	<b>First Name</b>	<b>Middle Name</b>
<input type="text" value="Collins"/>	<input type="text" value="Linda"/>	<input type="text" value="Sue"/>
<b>Address</b>	<b>City</b>	<b>State</b>
<input type="text"/>	<input type="text"/>	<input type="text" value="WA"/>

**8) Case Status**

PHIMS has two statuses for a TB case: "investigation in progress" and "complete". A PHIMS TB case becomes "complete" if there is a date in the field "Date Therapy Stopped (field # 43)". A case with a status of "investigation in progress" is displayed on the *Case Action* screen (see screenshot below) whereas a "complete" case is not. Both types of cases can be retrieved and updated by using the *Find Case* screen (see screenshot below). Use the selection criteria "Case status".

## 9) Case Action

This screen lists all “open” cases (*case status* field = “investigation in progress”) assigned to you. No two *Case Action* screens have the same cases listed since a case is assigned to only one investigator at a time. See *Case Administration* section of this document to find out how to change the case assignment to a different investigator within your jurisdiction. The case will remain on the screen until:

- the *Date Therapy Stopped* field is entered causing the *Case Status* to change to “complete”
- the case is reassigned to another LHJ investigator within the accountable jurisdiction using the function “*Case Administration | Reassign/Save*”
- the case is transferred to another jurisdiction using the function “*Case Administration | Transfer*”

A case can be accessed by clicking on the *Case ID* field. You can sort all fields ascending or descending.

User: Andrea Cotey Version: 3.3 PHIMS-LHJ

Case Management Reports Export Administration Policies Help Log Out

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**Case Action** Open Cases = 5

Click on the CaseID to edit information for the patient

Case ID	Name	Condition	Onset Date	Classification	Age	Age Unit
<a href="#">53063-0901-0002</a>	Collins, Linda Sue	Tuberculosis		Confirmed	Unknown	
<a href="#">53000-0901-0003</a>	Baggins, Bilbo Woodland	Tuberculosis		Confirmed	Unknown	
<a href="#">53063-0901-0007</a>	Mulligan, Sara S	Tuberculosis		Confirmed	Unknown	
<a href="#">53051-0901-0003</a>	Grant, Sidney James	Tuberculosis		Suspect	Unknown	
<a href="#">53063-0901-0008</a>	Jenkins, Patricia	Tuberculosis		Suspect	Unknown	

1

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## 10) Find Case screen

This screen allows an LHJ investigator to find case(s) using multiple selection criteria. The more information you search by, the quicker the system will respond to the search criteria and fewer records will be retrieved. The maximum number of cases returned per search is 75. For that reason you should not use this function for case counts. Use Reports or Exports for that purpose. Narrowing down the search will be helpful for locating the case.

After entering your search criteria, click on the *Find Case* button. You can access a case by clicking on the *Patient name* field. To review all cases entered for a county click on the blank column header (at the top of the dropdown box) under “Investigator” – this will leave that field blank so that all cases entered will be displayed.

Special situations for TB cases are:

- “Onset date” – does not apply to TB
- “Case Verification” values are assigned a “Case classification” value as shown above in Table 1.
- *Notified Date* label is used for other PHIMS conditions; for TB this is the same as *Date Reported* field.

Find Case
Cases = 4

**Selection Criteria**

Last Name: starts with

Accountable Jurisdiction: Spokane

Disease Type: Tuberculosis

Investigator: Cotey , Andrea

Case Classification:

Case ID:

Birthdate:

Case Status:

Notified Date:  to

Onset Date:  to

4 records retrieved at 1/8/2009 5:07:41 PM. To refresh this list click the Find Case button.

Name	Disease	Birthdate	M/F	Notified	Onset	County	Investigator
<a href="#">Mulligan, Sara S</a>	Tuberculosis	05/11/2000	F	01/02/2009		Spokane	Cotey, Andrea
<a href="#">Jenkins, Patricia</a>	Tuberculosis	02/11/1956		06/12/2008		Spokane	Cotey, Andrea
<a href="#">Garrison, George Leonard</a>	Tuberculosis	04/10/1934	M	01/01/2009		Spokane	Cotey, Andrea
<a href="#">Collins, Linda Sue</a>	Tuberculosis	09/19/1962	F	01/02/2008		Spokane	Cotey, Andrea

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### 11) Case Administration screen

Access this screen by using the dropdown at the top of the *RVCT Data Entry* screen.

Case Management Reports Export Administration Policies Help Log Out

Collins, Linda Sue

Section: Case Administration Case ID: 53063-0901-0002 Acct Jurisdiction: Spokane Onset Date: N/A  
LHJ Classification: Confirmed Investigator: Cotey, Andrea LHJ Notified: 1/2/2008

**Report of Verified Case of Tuberculosis**

Report Now Case Verification Current Verification Status: Verified by Provider Diagnosis  
ast reported to DOH Verification Status: [dropdown]

The Case Administration section allows you to...

**Reassign** the case to another LHJ investigator within the accountable jurisdiction

Investigator Assignment

Investigator: Cotey, Andrea Available Investigators: [dropdown] Reassign/Save

**Transfer** the case to another jurisdiction

Accountable Jurisdiction

Jurisdiction: Spokane Available Jurisdictions: [dropdown] Transfer

***\*Important...please read to avoid duplicate case entries and minimize the confusion of case reporting to DOH and CDC***

Disease case investigation is normally conducted by the patient's county of residence and the case "belongs" to that county (or LHJ). PHIMS was designed to reflect this business practice. Each case is stored in the PHIMS database once only and is associated with the county that has jurisdiction over the case. Counties are not able to view or make changes to cases belonging to other counties. Occasionally a case investigation is initiated by one county and subsequently the patient is found to reside in another county or moves to another county. In these cases, it is necessary for the initiating county to transfer the case to the county that has jurisdiction over the case. The PHIMS "Transfer" function is used to transfer a case from one county to another. The right to transfer cases in PHIMS can be limited to a single person in a county or given to multiple case investigators for a county, depending on who the county selects to have this privilege.

The Case Administration button is located on the Data Entry screen (in the case banner click on the drop down box next to Data Entry and choose Case Administration)". In order to transfer a PHIMS case to another county, the county or LHJ originating the PHIMS case selects a county from the "Available Jurisdictions" dropdown list and then clicks on the "Transfer" button. Transfer history is reflected at the bottom of the screen. Once the transfer has been made, **the originating county will no longer have access to the case information in PHIMS** and will need to refer to hard copy notes or a saved electronic copy of the case report for any ongoing follow-up.

The screenshot displays the PHIMS Case Administration interface. At the top, the PHIMS logo is on the left, and navigation links for Case Management, Reports, Export, Administration, Policies, Help, and Log Out are in the center. The user name 'User: Andrea Cotey' is on the right. Below this is a case banner for 'Batty, Nora' with the classification 'Arboviral Disease'. A dropdown menu is set to 'Case Administration'. Case details include: Acct Jur: Washington State, Notified: 5/27/2005, Investigator: Cotey, Andrea, Case ID: 53000-0505-0021, Onset: N/A, and Classification: N/A. A red warning message states 'Attention: Screen changes have not been saved.' Below the banner are tabs for 'Main View', 'Case', 'Assignment', and 'Status'. The 'Case' tab is active, showing 'Accountable Jurisdiction' with 'Jurisdiction: Washington State' and 'Available Jurisdictions: Columbia' (highlighted in green). A 'Transfer' button is to the right, with a red arrow pointing to it. Below is 'Investigator Assignment' with 'Investigator: Cotey, Andrea' and 'Available Investigators:' (empty dropdown). A 'Reassign/Save' button is to the right. At the bottom, there are two tables: 'Transfer History' and 'Investigator History'. The 'Transfer History' table has columns for Jurisdiction, Effective Date, Investigator, and Effective Date, with one entry: Washington State, 5/27/2005 12:47:44 PM, Cotey, Andrea, 5/27/2005 12:47:44 PM. The 'Investigator History' table has columns for Investigator and Effective Date, with one entry: Cotey, Andrea, 5/27/2005 12:47:44 PM. A red arrow points to the 'Investigator History' table.

It's important to adhere to correct transfer procedures in order to avoid creating duplicate cases in the database (and to avoid duplicate reporting to the CDC). By following the guidelines below we can minimize duplicates.

## Do's and Don'ts

### Guidelines for the Transferring County

- **Do** consider saving a printed copy of the RVCT Report for your records prior to making a transfer.
- **Do** transfer the case as soon as you know it belongs to another county
- **Do** complete and fax the Interjurisdictional Transfer form to the DOH TB Program
- **Do** contact the receiving county prior to transferring the case and give them patient identifiable information or PHIMS/ ID #—there is **no** automatic email notification

**STATUS**


**PHIMS** Case Management Reports Export Administration Policies Help Log Out User: Andrea Cotey

**Batty, Nora** Arboviral Disease

Section	Acct Jur: Washington State	Notified: 5/27/2005	Investigator: Cotey, Andrea
Case Administration	Case ID: 53000-0505-0021	Onset: N/A	Classification: N/A

Main View | Case | Assignment | **Status**

Status Save

Case Status: Investigation in progress Delete Case 

Report Status: Case Not Reported Report Now

Investigation Complete Date:

Jurisdiction Notification Date: 5/27/2005 \*

### Guidelines for the Receiving County

- **Do** Find the Case using information received from the transferring county
- **Do** reassign the case to an investigator within your county
- **Do** review the Case Administration | Assignment and Status screens to make sure the information is accurate

# REASSIGN

<b>PHIMS</b> Case Management Reports Export Administration Policies Help Log Out	User: <i>Andrea Cotey</i>		
<b>Campo, Bill</b> <span style="float: right;"><b>Brucellosis</b></span>			
Section: <input type="text" value="Case Administration"/>	Acct Jur: Washington State	Notified: 5/27/2005	Investigator: Cotey, Andrea
Case ID: 53000-0505-0022	Onset: N/A	Classification: N/A	

Attention: Screen changes have not been saved.

<b>Main View</b>   Case   <b>Assignment</b>   Status	
<b>Accountable Jurisdiction</b>	
Jurisdiction: Washington State	Available Jurisdictions: <input type="text"/> <input type="button" value="Transfer"/>
<b>Investigator Assignment</b>	
Investigator: Cotey, Andrea	Available Investigators: <input type="text" value="Halsell, Chrs"/> <input type="button" value="Reassign/Save"/>



## 12) Reports – reports can be generated by accessing the reports function in the main menu.

- Type of report: individual case:

### Title: **TB RVCT Report**

A print out of all fields entered on the *RVCT Data Entry* screen. The “Case ID” (i.e. “PHIMS ID”) and County must be entered to run the report. The “Case ID” will automatically be inserted with the ID of the case that was last displayed. Click the “Submit Report” button to produce an Acrobat (PDF) file.

The following reports are case lists with built in criteria determining what cases will be shown in the reports. They all have the same user entered selection criteria: *County* and *Date Reported*; date range is not required and will return all cases in the database if not completed. If you complete both beginning and ending date ranges (i.e. 01/01/2007 – 12/31/2007, only those cases will be returned. You can enter the first field of the date range leaving the end date range blank and cases through current date will be returned. You have the option of saving the resulting cases as an Acrobat (PDF) or Excel file. See page 16 for instructions.

- Title: **TB Closed Case Report**

Report returns cases defined as closed meaning a date has been entered in the field “Date Therapy Stopped” (RVCT element 43).

- Title: **TB 90 Day Report**

Report returns cases where *Case Verification* field = suspect AND *Date Reported* > than 90 days from current date. Do not enter a date range as the >90 days from current date is the pre-defined criteria.

- Title: **TB Cases Not Submitted**

Report returns cases where *Date Submitted* (RVCT element 2) does not contain a date. The purpose of this report is to eliminate the possibility of cases not being reported to DOH because an LHJ investigator fails to use the *Report Now* button.

- Title: **TB Case List**

Report returns all cases based on the date range and county. No pre-defined criteria is built in.

### 13) Exports

To conduct data analysis with PHIMS data, the Export function allows extraction of data on any cases that you have permission to view. Exports are downloaded to a text file. From there they can be imported easily into Excel or a number of other software programs for analysis.

**Warning** Information stored in PHIMS is protected through encryption and the PHIMS security system. The data is decrypted when it is exported. Protecting electronic data becomes **your** responsibility once you have exported it.

Tuberculosis Export

Selection Criteria			Export Case Count
<b>Accountable Jurisdiction:</b> <input type="text" value="All Counties"/> Adams Asotin Benton Chelan			<< Select all that apply • Hold Shift key to select multiple adjacent items. • Hold Ctrl key to select multiple non-adjacent items.
Date Range Type	Start	End	<b>Export</b> <b>View Files</b> Go to the File Viewer page. <b>Reset</b> Reset the criteria to the default values.
Date Reported:	<input type="text"/>	<input type="text"/>	<b>Reminder</b> The information in this Export includes sensitive and confidential material. It is up to you to ensure that its use and storage is in accordance with your organization's confidentiality policies.

To get all of your cases, don't select a date range. The exported file includes all fields you've entered on the RVCT Data Entry screen. See the "Tuberculosis" tab on the *User Dictionary* located on the PHIMS Help Menu.

The *Export Case Count* button will notify you of how many records will be returned for those selected criteria. If the count is agreeable, the query can be executed using the *Export* button and the file will be downloaded. You will be redirected to the File Viewer page to view the file. Click on the file name to open it. The data export will open up as a text file that you can then import into most data analysis software programs. There are several ways to download your data into an Excel spreadsheet. The simplest is to highlight all of the data (right-click mouse and choose Select All) and copy it (right-click mouse and choose Copy). Then, open up a new Excel spreadsheet and paste into the left uppermost box on the spreadsheet (to paste, click on "Paste" from the file dropdown menu).