

Bulk Patient Search Bulk Patient History

Bulk Patient Search

How do you want to enter patients?

Manual Entry
 File Upload

Manual Entry

First Name* Last Name* Date of Birth* Zip Code

Name Grouping

Enter a name for this search session. This will make it easy to distinguish between searches in the history

Group Name*

Prescription Fill Dates

No earlier than 3 years from today

From* To*

This tutorial steps through how to request multiple Patient Rx reports at once using Bulk Patient Search.

Learn to

- Access the Bulk Patient Search
- Add Multiple Patients by Manual Entry or by File Upload
- Validate format of a File Upload
- Check the status of a Bulk Patient Search
- View Results

Log in to begin

This feature is available based on your role and permissions set by your administrator.

Bulk Patient Search

Bulk Patient History

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How do you want to enter patients?

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Manual Entry

First Name*

Last Name*

Date of Birth*

Zip Code

Add +

Name Grouping

Enter a name for this search session. This will make it easy to distinguish between searches in the history

Group Name*

Prescription Fill Dates

No earlier than 3 years from today

From*

To*

Access Bulk Patient Search

To access this feature, navigate to the **Bulk Patient Search** page in the **RxSearch** section of the navigation menu.

Requesting reports for multiple patients

1. Enter all patients' search criteria

Requesting reports for multiple patients at once begins with loading each patient's request information either manually one-by-one or via a file upload.

2. Create a Group Name for your bulk search

In the Group Name field, create a unique name

3. PMP Interconnect Search

Be aware that you can use the PMP Interconnect Search to search for that patient's records in other states.

4. Enter Prescription Fill Dates

Finally on this page, enter the date range to search, formatted in mm/dd/yyyy.

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How do you want to enter patients?

Manual Entry
 File Upload

Manual Entry

First Name*	Last Name*	Date of Birth*	Zip Code	
<input type="text" value="Dave"/>	<input type="text" value="Testpatient"/>	<input type="text" value="01/01/1990"/>	<input type="text"/>	<input type="button" value="✕ Remove"/>
First Name*	Last Name*	Date of Birth*	Zip Code	
<input type="text" value="Sally"/>	<input type="text" value="Testpatient"/>	<input type="text" value="01/01/1900"/>	<input type="text"/>	<input type="button" value="✕ Remove"/>
First Name*	Last Name*	Date of Birth*	Zip Code	
<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>	<input type="button" value="Add +"/>

Name Grouping

Enter a name for this search session. This will make it easy to distinguish between searches in the history

Group Name*

Prescription Fill Dates

No earlier than 3 years from today

Add multiple patients by Manual Entry or File Upload

There are two options for adding patients to a bulk search. One is by manually entering each patient in the search criteria Manual Entry table. The other is by uploading a csv file containing the required patient criteria.

Manual Entry

- In this example, two patients have been added to the Manual Entry table. For each patient entered, their first name, last name, and DOB are required, indicated by a red asterisk.
- To include another patient in the table, type the required patient information, then click the **Add** button to confirm the addition.
- To delete a patient from the table, click the **Remove** button to the right of the patient's information.

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Bulk Patient Search

How do you want to enter patients?

Manual Entry
 File Upload

File Upload

Upload a CSV file that includes patients by first name, last name and date of birth. [View Sample file](#)

C:\fakepath\bulk_patient_search.
Choose File
Clear

Validate Format

Name Grouping

Enter a name for this search session. This will make it easy to distinguish between searches in the history

Group Name*

Prescription Fill Dates

No earlier than 3 years from today

Add multiple patients by Manual Entry or File Upload (continued)

File Upload is the second option displayed after Manual Entry and the alternate way to add patients for a Bulk Patient Search.

File Upload

- Your file must be in CSV format and include proper field labels (case sensitive). Click **Sample File** to see an example of the CSV file layout.

Label Example

First_Name	Last_Name	Birthdate
Dave	Testpatient	01/01/1900

- Use the mm/dd/yyyy format, including the slashes, to ensure accurate dates of birth. (Required)
- To upload your CSV file, click **Choose File**. Locate your file, then select Open. The file name should appear in the file upload box (as shown).
- It is best to check the file for format errors by clicking **Validate Format**. Format validation provides a CSV validation results file you can download.

NOTE: Validation results open in Excel, which removes leading zeroes from dates so that 01/01/1900 appears as 1/1/1900. Excel does not indicate an issue. The results file contains a column dedicated to flagging errors. Continue reading for more information

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Bulk Patient Search

How do you want to enter patients?

Manual Entry
 File Upload

File Upload

Upload a CSV file that includes patients by first name, last name and date of birth. [View Sample file](#)

Validate Format

Name Grouping

Enter a name for this search session. This will make it easy to find.

Group Name*

	A	B	C	D	E
1	first_name	last_name	birthdate	postal_code	errors
2	Dave	Testpatient	1/1/00		
3	first_name	last_name	birthdate	postal_code	errors
4	Amy	testpatient	1/1/00		
5					
6					
7					

Prescription Fill Dates

No earlier than 3 years from today

Validate the format of a File Upload

This example Criteria screen image shows a file chosen for upload, determined by the presence of a file path displayed in the File Upload field.

You can also tell the file was sent through format validation, identified by the message displayed below the Validate Format button that says “See download file for validation feedback on your upload.”

- Validation Results download as a file that notes any row with issues by including an explanation in an Errors column at the end of the table.
- Correct errors in your original CSV file, then resubmit the file.
- If the error column is empty as shown in the screenshot, that means your file has no format issues and is ready to be sent through the Bulk Patient Search.
- Once the file is validated, there are just a couple more required fields before you can request a Bulk Patient Search.

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Bulk Patient Search

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Manual Entry

First Name* Last Name* Date of Birth* Zip Code

Name Grouping

Enter a name for this search session. This will make it easy to distinguish between searches in the history

Group Name*

Prescription Fill Dates

No earlier than 2 years from today

From* To*

Create a Group Name for your bulk search

For every Bulk Patient Search you request, you must create a unique group name for that particular group of patients. Naming each Bulk search you do helps you locate it in the Bulk Search History later..

Enter Prescription Fill Dates:

- Enter a date range (From/starting date and To/ending date) you want the system to search.
- In the image shown, the starting date specifies “no earlier than 2 years from today.” This preset varies based on configurations set by your state PMP administrator.
- The dates are prepopulated, defaulting to a two-year span from the current date. These dates can be changed to any time frame that is no earlier than two years from current date.

Click the **Search** button at the bottom of the screen to start your Bulk Patient Search.

✓ **Success**
 Your Bulk Request validated successfully and is now being processed. Results can be found in Bulk Patient History tab. DISMISS

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Bulk Search History

Select a group name to view reports run in that session.

Bulk Search Name	Number of Patients	Date Requested	Processing	Incomplete	Ready
test group 2	2	02-13-2018	2	0	0
test group	1	02-13-2018	0	0	1

Check the Status of a Bulk Patient Search

At the top of the Bulk Patient Search screen, a success message displays indicating your search has started.

At the top of the screen is a tab called **Bulk Patient History**. Click the tab to open the section. Your bulk searches appear here, by the Group Name you create for them.

Bulk Search History List

- **Number of Patients:** Total number of patients included in the bulk search.
- **Processing:** Number of patients still in processing. Zero means this Bulk Search is done.
- **Incomplete:** Finished searches where a patient that matches the criteria could not be identified.
- **Ready:** Number of Patient reports ready to be viewed.

View Patient Reports: Click the Bulk Search Name (group name) to see an overview of all results and access individual Patient Reports.

Bulk Patient Summary

Click the name of your bulk patient group in the Bulk Search History to display an overview called Bulk Patient Summary.

The Summary Displays:

All patients you included in the bulk search in a summarized table showing:

- Patient name and DOB
- For reports in Ready status, the number of prescribers, dispensers, and prescriptions found within the Rx Fill Date range specified.
- The Supervisor field indicates the name of the supervisor for whom a delegate ran the report. If you are a supervisor this field will be blank.
- The current status or outcome of each patient search processed.

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Group Name

test group 2

Prescription Fill Dates: 02/13/2016 - 02/13/2018
PMP InterConnect States:
Report Prepared: 02/13/2018 08:29 PM

Bulk Patient Summary
 Select a patient to view the report

Patient Full Name	DOB	Prescribers	Dispensers	Prescriptions	Supervisor	Status
alice testpatient	01/01/1900	1	1	2		Ready
Terry Testpatient	01/01/1900	0	0	0		Incomplete

alice testpatient
Refresh
View

Date of Birth: 01/01/1900
Location:
PMPi States:
Reason:
Prescription Fill Dates: February 13, 2016 until February 13, 2018

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Group Name

test group 2

Prescription Fill Dates: 02/13/2016 - 02/13/2018
 PMP InterConnect States:
 Report Prepared: 02/13/2018 08:29 PM

Bulk Patient Summary
 Select a patient to view the report

Patient Full Name	DOB	Prescribers	Dispensers	Prescriptions	Supervisor	Status
alice testpatient	01/01/1900	1	1	2		Ready
Terry Testpatient	01/01/1900	0	0	0		Incomplete

alice testpatient
Refresh
View

Date of Birth: 01/01/1900
 Location:
 PMPi States:
 Reason:
 Prescription Fill Dates: February 13, 2016 until February 13, 2018

Viewing Results

In Bulk Patient Summary

In this example, Alice Testpatient's search is complete, indicated by "Ready" listed under Status. The row you click is highlighted.

By clicking a row, the card at the bottom of the screen populates with that patient's information and the outcome of the search.

- View the total number of prescriptions, prescribers, and dispensers between the Rx Fill Dates specified for that patient.
- Access the **Patient Rx Report** by clicking the **View** button.
- The **Refresh** button, next to the view button, opens the standard **RxSearch Patient Request** screen prepopulated with the criteria previously entered for this patient. You can adjust the criteria and run a new report.

Note: If results don't automatically appear on screen, please check for the presence of a vertical scroll bar, as it may visibly hide a single result.

In Request History

All Bulk Patient Searches also appear in Request History as if they were each individually requested.

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Group Name

test group 2

Prescription Fill Dates: 02/13/2016 - 02/13/2018
 PMP InterConnect States:
 Report Prepared: 02/13/2018 08:29 PM

Bulk Patient Summary
 Select a patient to view the report

Patient Full Name	DOB	Prescribers	Dispensers	Prescriptions	Supervisor	Status
alice testpatient	01/01/1900	1	1	2		Ready
Terry Testpatient	01/01/1900	0	0	0		Incomplete

Download PDF

Terry Testpatient

Date of Birth: 01/01/1900
Location:
PMPI States:
Reason: No Matching Patient Identified
Prescription Fill Dates: February 13, 2016 until February 13, 2018

↻ Try Again

Status Explanations

- **In Progress:** This search is still in processing
- **Ready:** A patient matching the criteria was found and had prescriptions filled within the date range specified..
- **Incomplete:** A patient could not be identified. This could be for multiple reasons:
 - No match:* No patient could be Identified matching the criteria provided.
 - Multiple Patients found:* Incomplete can also mean that Multiple Patients were found. In this case, click **Try Again** to view the multiples and determine which records to choose, then run the report.
- **No RXs Found:** A patient matching the criteria was found, but no prescriptions were found for this patient within the date range specified. Note that you can still view this report, but there will be no prescription data listed.