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PMP AWARxE®

## Bulk Patient Search Tutorial



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# Bulk Patient Search Tutorial – 1 of 10

This tutorial walks you through how to request multiple Patient Rx Reports at once using Bulk Patient Search.

Learn to perform the following:

- 🌱 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

The screenshot shows the 'Bulk Patient Search' web interface. At the top, there are two tabs: 'Bulk Patient Search' (active) and 'Bulk Patient History'. Below the tabs, the main heading is 'Bulk Patient Search'. Underneath, there is a section titled 'How do you want to enter patients?' with two radio button options: 'Manual Entry' (selected) and 'File Upload'. Below this, there is a 'Manual Entry' section with four input fields: 'First Name\*', 'Last Name\*', 'Date of Birth\*' (with a placeholder 'MM/DD/YYYY'), and 'Zip Code'. An 'Add +' button is located to the right of the 'Zip Code' field. Below the input fields, there is a 'Name Grouping' section with a sub-heading 'Enter a name for this search session. This will make it easy to distinguish between searches in the history' and a 'Group Name\*' input field. At the bottom, there is a 'Prescription Fill Dates' section with the instruction 'No earlier than 3 years from today' and two date input fields: 'From\*' (with the value '02/13/2016') and 'To\*' (with the value '02/13/2018').



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## Access Bulk Patient Search

To access this feature, navigate to **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 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.

The screenshot shows the 'Bulk Patient Search' interface. At the top, there are two tabs: 'Bulk Patient Search' (active) and 'Bulk Patient History'. Below the tabs, the main heading is 'Bulk Patient Search'. Underneath, there is a section titled 'How do you want to enter patients?' with two radio button options: 'Manual Entry' (selected) and 'File Upload'. Below this, there is a 'Manual Entry' section with four input fields: 'First Name\*', 'Last Name\*', 'Date of Birth\*' (with a placeholder 'MM/DD/YYYY'), and 'Zip Code'. An 'Add +' button is located to the right of the 'Zip Code' field. Below the 'Manual Entry' section is a 'Name Grouping' section with a text input field for 'Group Name\*' and a note: 'Enter a name for this search session. This will make it easy to distinguish between searches in the history'. Below that is a 'Prescription Fill Dates' section with a note: 'No earlier than 3 years from today'. It contains two date input fields: 'From\*' (with '02/13/2016') and 'To\*' (with '02/13/2018').

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## Add Multiple Patients by Manual Entry or File Upload

There are two options for adding patients to a **Bulk Patient 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 and 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.

The screenshot shows the 'Bulk Patient Search' interface. At the top, there are two tabs: 'Bulk Patient Search' (active) and 'Bulk Patient History'. Below the tabs, the main heading is 'Bulk Patient Search'. Underneath, there is a section titled 'How do you want to enter patients?' with two radio buttons: 'Manual Entry' (selected) and 'File Upload'. The 'Manual Entry' section contains a table with three rows. The first two rows have patient information entered: 'Dave' (First Name), 'Tespatient' (Last Name), and '01/01/1990' (Date of Birth). The third row is empty. Each row has a 'Remove' button to its right. Below the table is an 'Add +' button. Under the table, there is a 'Name Grouping' section with a text input field for 'Group Name\*'. At the bottom, there is a 'Prescription Fill Dates' section with the text 'No earlier than 3 years from today'.

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## 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 the 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 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.

The screenshot shows the 'Bulk Patient Search' interface. At the top, there are two tabs: 'Bulk Patient Search' (active) and 'Bulk Patient History'. Below the tabs, the main heading is 'Bulk Patient Search'. Underneath, there is a section titled 'How do you want to enter patients?' with two radio buttons: 'Manual Entry' (unselected) and 'File Upload' (selected). Below this is the 'File Upload' section, which includes the instruction 'Upload a CSV file that includes patients by first name, last name and date of birth. View Sample file'. There is a text input field containing 'C:\fakepath\bulk\_patient\_search.', a 'Choose File' button, and a 'Clear' button. Below the input field is a 'Validate Format' button. The 'Name Grouping' section has the instruction 'Enter a name for this search session. This will make it easy to distinguish between searches in the history' and a 'Group Name\*' input field. The 'Prescription Fill Dates' section has the instruction 'No earlier than 3 years from today' and a date range selector with minus and plus buttons.

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## 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 reads, "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 image to the right, 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**.

The screenshot shows the 'Bulk Patient Search' interface. At the top, there are two tabs: 'Bulk Patient Search' (active) and 'Bulk Patient History'. Below the tabs, the main heading is 'Bulk Patient Search'. Underneath, there is a section titled 'How do you want to enter patients?' with two radio buttons: 'Manual Entry' and 'File Upload' (selected). Below this is the 'File Upload' section, which includes a text input field containing 'C:\fakepath\bulk\_patient\_search.', a 'Choose File' button, and a 'Clear' button. Below the input field is a 'Validate Format' button. Underneath the 'Validate Format' button is a section titled 'Name Grouping' with a text input field and a message: 'Enter a name for this search session. This will make it easy to distinguish between searches in the history'. Below the 'Name Grouping' section is a 'Prescription Fill Dates' section with a text input field and a message: 'No earlier than 3 years from today'. At the bottom right of the screenshot is a table with 7 rows and 5 columns (A, B, C, D, E). The table contains data for two patients: Dave and Amy.

	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		
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## 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 conduct will help 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 PMP administrator.
- The dates are pre-populated, defaulting to a 2-year span from the current date. These dates can be changed to any time frame that is no earlier than 2 years from the current date.

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

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## 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 labeled **Bulk Patient History**. Click the tab to open this section. Your bulk searches appear here sorted by the **Group Name** you created for them.

### Bulk Search History List

- 🌿 **Number of Patients:** Total number of patients included in the bulk search.
- 🌿 **Processing:** Number of patients still processing. Zero means this **Bulk Search** is complete.
- 🌿 **Incomplete:** Finished searches where a patient that matches the criteria could not be located.
- 🌿 **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**.

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

Bulk Patient Search **Bulk Patient History**

### 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

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## 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.

Bulk Patient Search Bulk Patient History

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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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## Viewing Results

### In Bulk Patient Summary

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

By clicking a row, the card at the bottom of the screen will populate with the patients' 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, located next to the **View** button, will open the standard **RxSearch Patient Request** screen pre-populated with the criteria previously entered for this patient. You can adjust the criteria and run a new report, if needed.

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

### In Request History

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

The screenshot shows the 'Bulk Patient Search' interface. At the top, there are two tabs: 'Bulk Patient Search' and 'Bulk Patient History'. Below the tabs, there is a 'Back' button and a 'Download PDF' icon. The main content area displays the 'test group 2' summary, including 'Prescription Fill Dates: 02/13/2016 - 02/13/2018', 'PMP InterConnect States', and 'Report Prepared: 02/13/2018 08:29 PM'. Below this is a 'Bulk Patient Summary' section with the instruction 'Select a patient to view the report'. A table lists patient results with columns for Patient Full Name, DOB, Prescribers, Dispensers, Prescriptions, Supervisor, and Status. The table has two rows: 'alice testpatient' (DOB: 01/01/1900, Prescribers: 1, Dispensers: 1, Prescriptions: 2, Status: Ready) and 'Terry Testpatient' (DOB: 01/01/1900, Prescribers: 0, Dispensers: 0, Prescriptions: 0, Status: Incomplete). Below the table, there is a card for 'alice testpatient' with a 'Refresh' button and a 'View' button. The card displays patient details: 'Date of Birth: 01/01/1900', 'Location:', 'PMPi States:', 'Reason:', and 'Prescription Fill Dates: February 13, 2016 until February 13, 2018'.

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

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## Status Explanations

- 🌿 **In Progress:** This search is still 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 reason, listed as follows:
  - 🌿 **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 Rx's Found:** A patient matching the criteria was found. However, no prescriptions were found for this patient within the date range specified.

*Note: You can still view this report, but there will not be any prescription data listed.*

Bulk Patient Search **Bulk Patient History**

← Back Download PDF

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

**Terry Testpatient** Try Again

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

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