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PMP AWARxE®

Bulk Patient Search Tutorial

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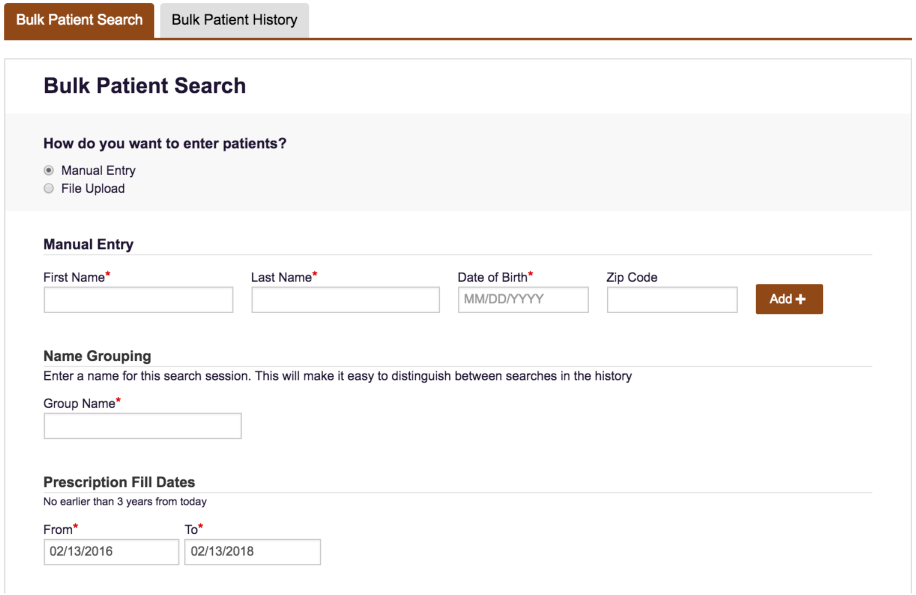
Bulk Patient Search Tutorial – 1 of 10

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



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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.**

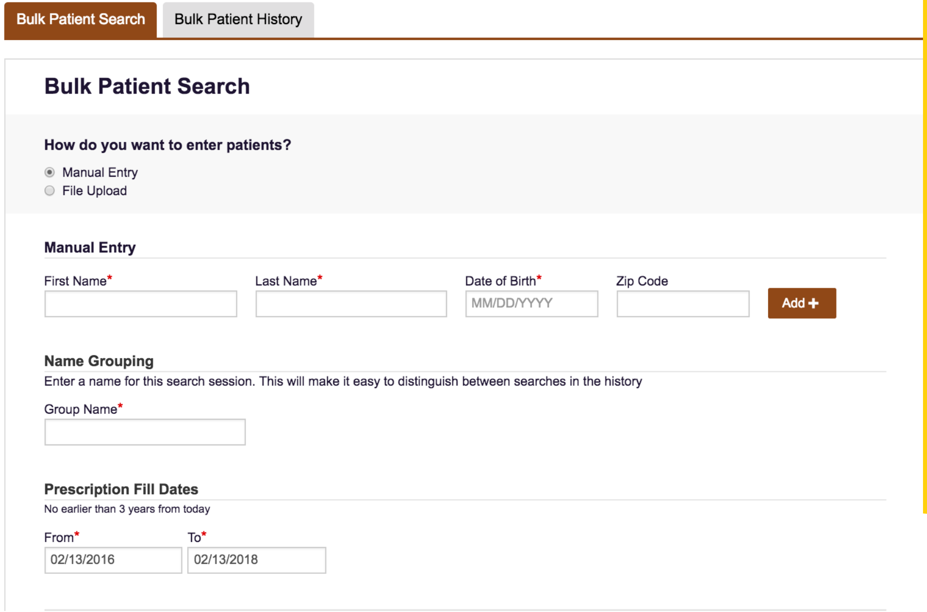
   In the **Group Name** field, create a unique name.

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.



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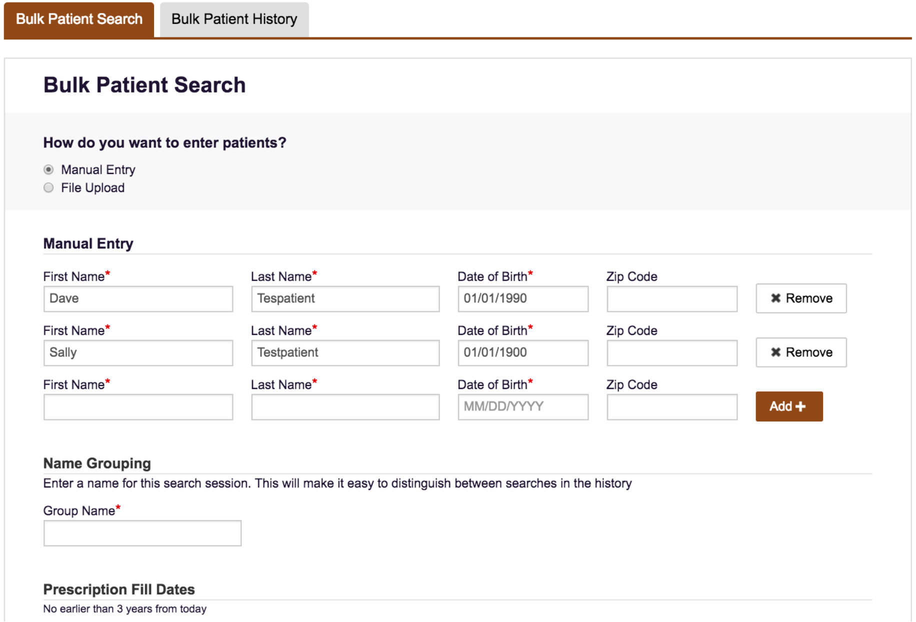
Add Multiple Patients by Manual Entry or File Upload

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.



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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

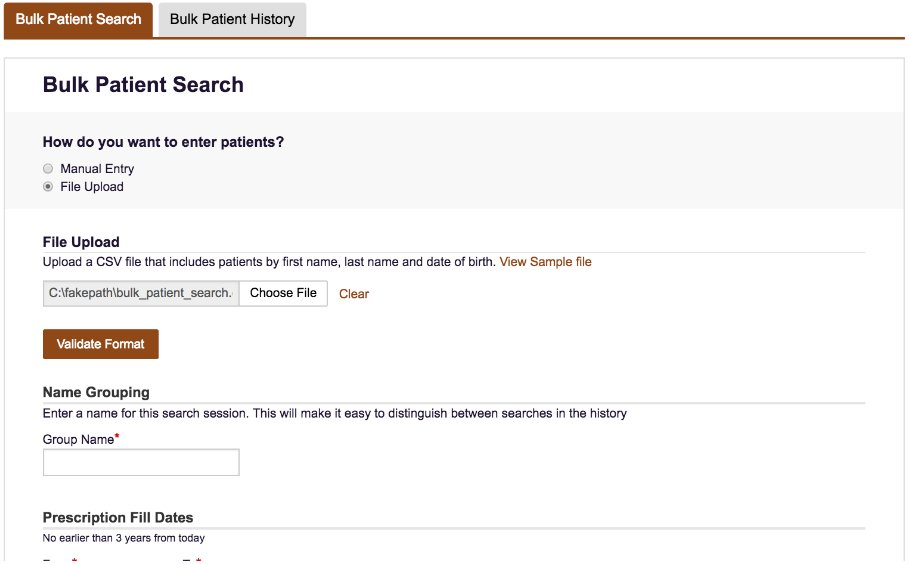
- Your file must be in CSV format and include the proper field labels (case sensitive). Click **Sample File** to see an example of the CSV file layout.

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.*



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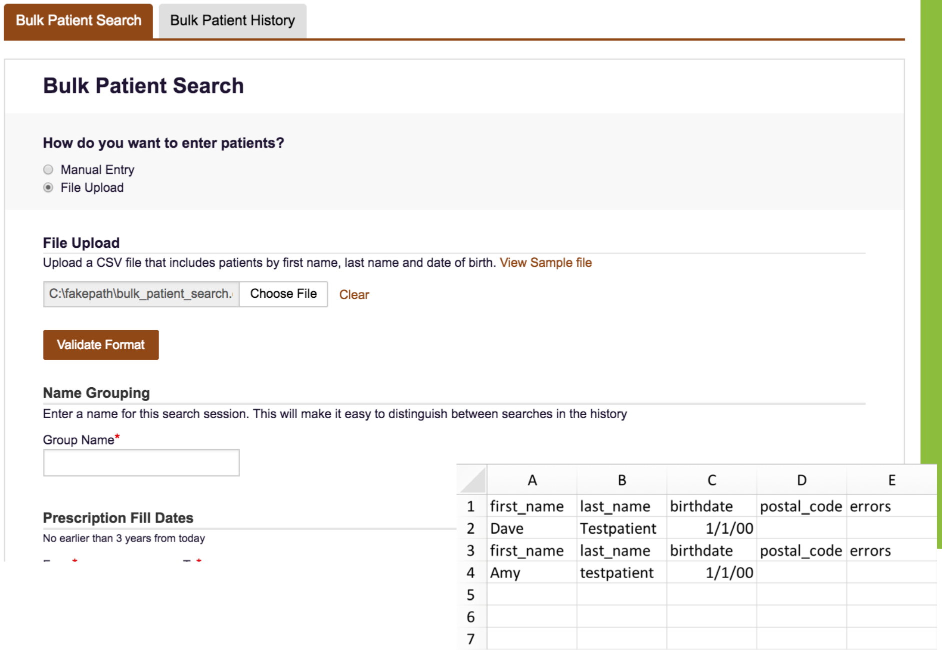
Validate the Format of a File Upload

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.**



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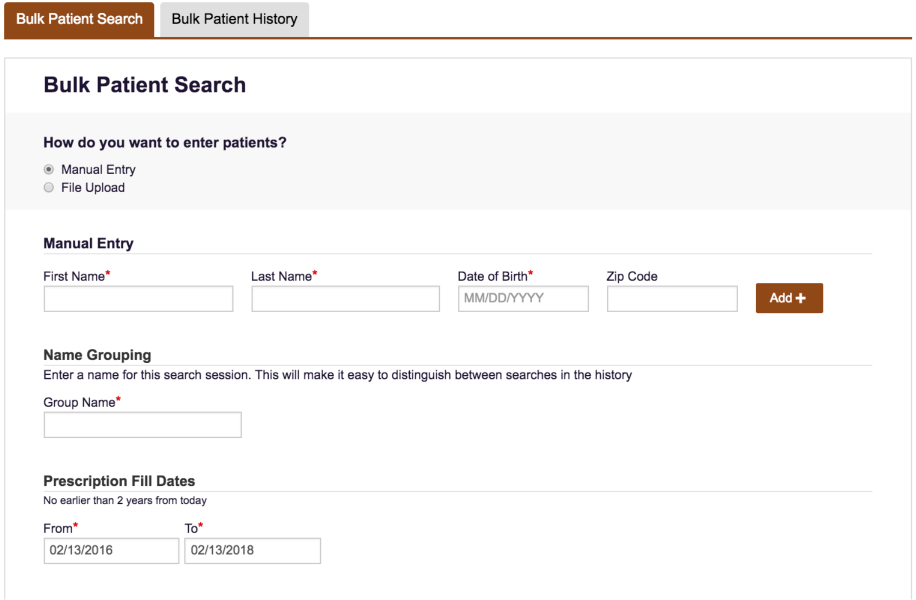
Create a Group Name for Your Bulk Search

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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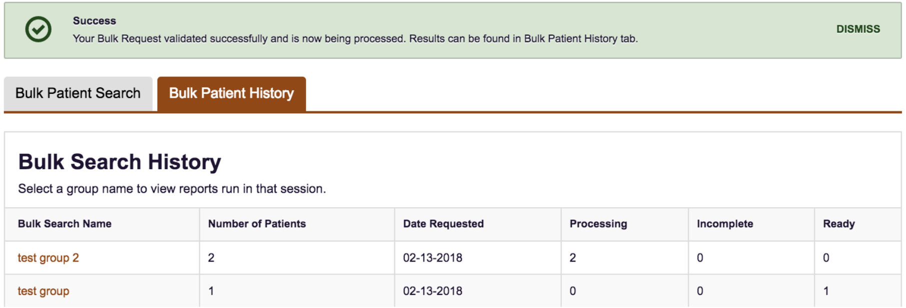
Check the Status of a Bulk Patient Search

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**.

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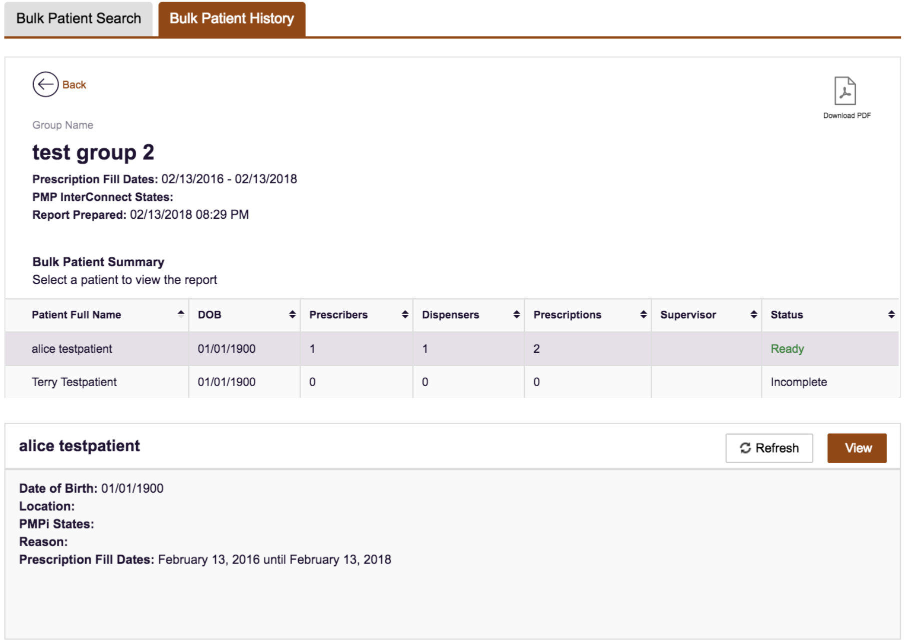
Bulk Patient Summary

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.



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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.

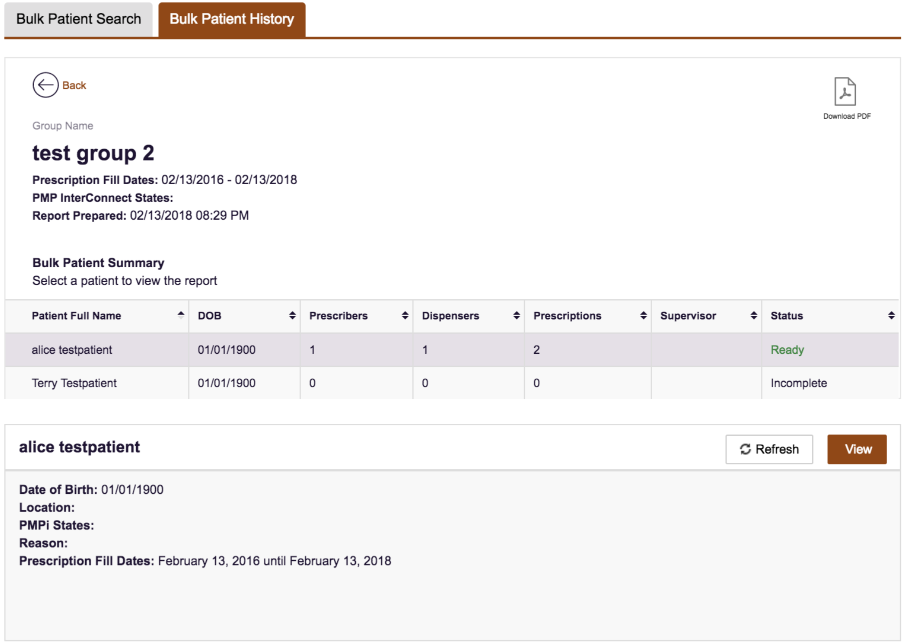
By clicking a row, the card at the bottom of the screen will populate with the patients' information and the outcome of the search.

- 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.



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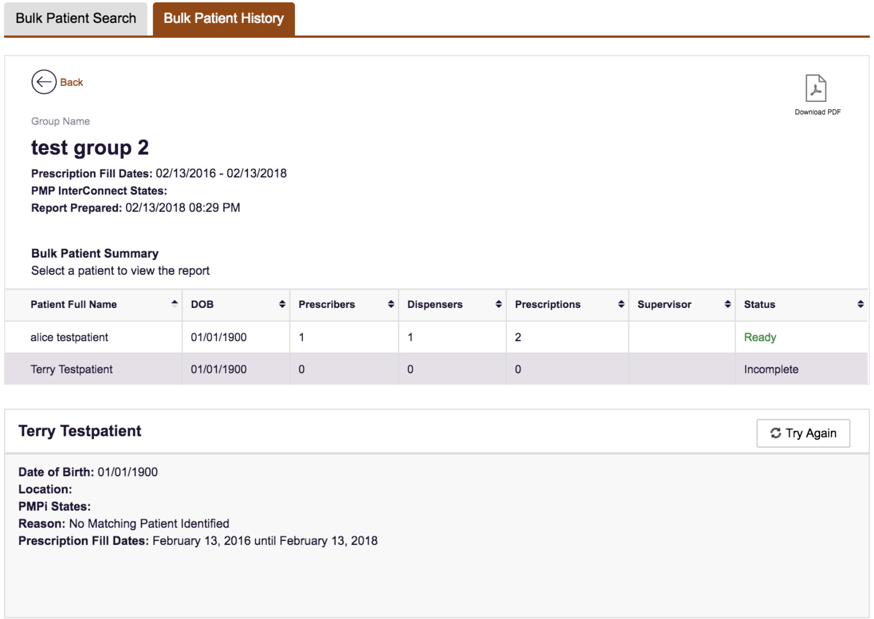
Status Explanations

- **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.*



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