

Creating searches to export to Excel

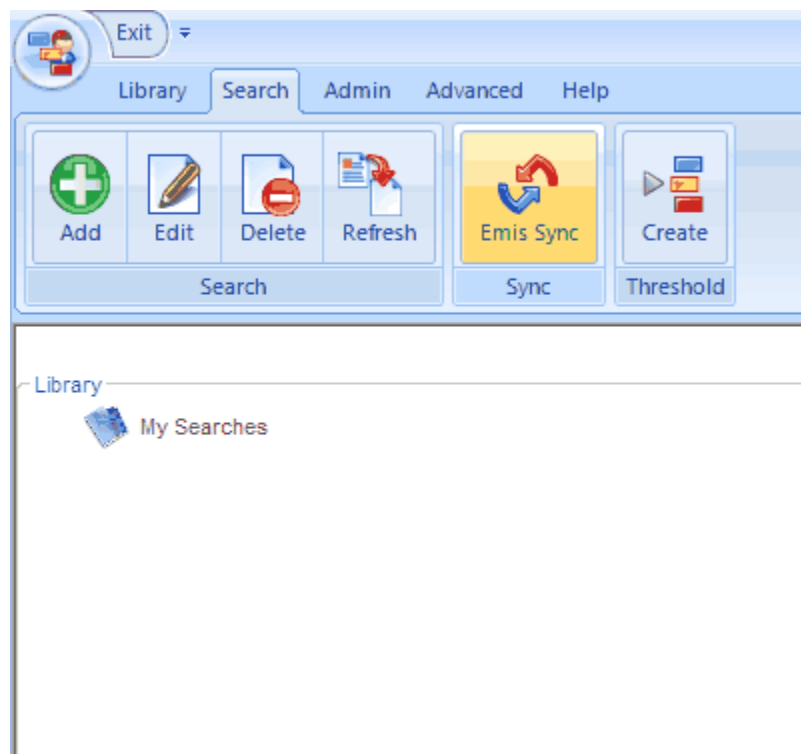
In this section you will be shown how to:

- Search for patients and then export their details to Excel.

This section uses a QOF 'Not in Target' search as the example. If you prefer to recall via month of birth, follow exactly the same steps, except:

Step 3 – Select 'Register' search and choose a month of birth.

Step 1 – Sync with EMIS



Syncing with EMIS will pull into PatientChase all the latest data with regard your practice's QOF status.

This will include:

- Patient registration data such as names, addresses, DOB etc
- All outstanding QOF targets from all clinical domains (e.g. Asthma, COPD, CHD etc)
- All chronic disease registers associated with the patients.

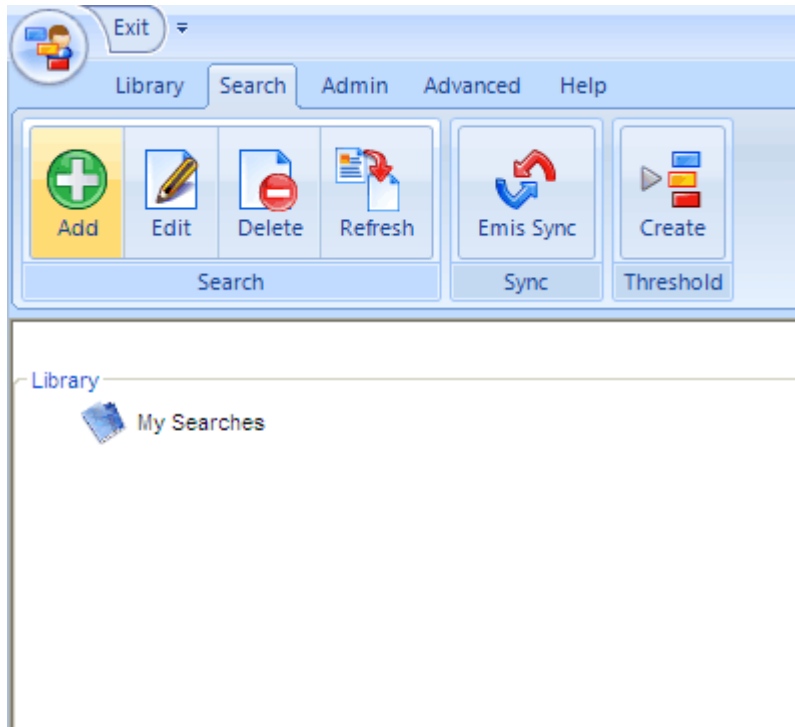
PatientChase uses the same data as EMIS Population Manager's **LOOK AHEAD** view.

The 'look ahead' period varies from practice to practice but is typically set at 3 months or 'end of financial year'.

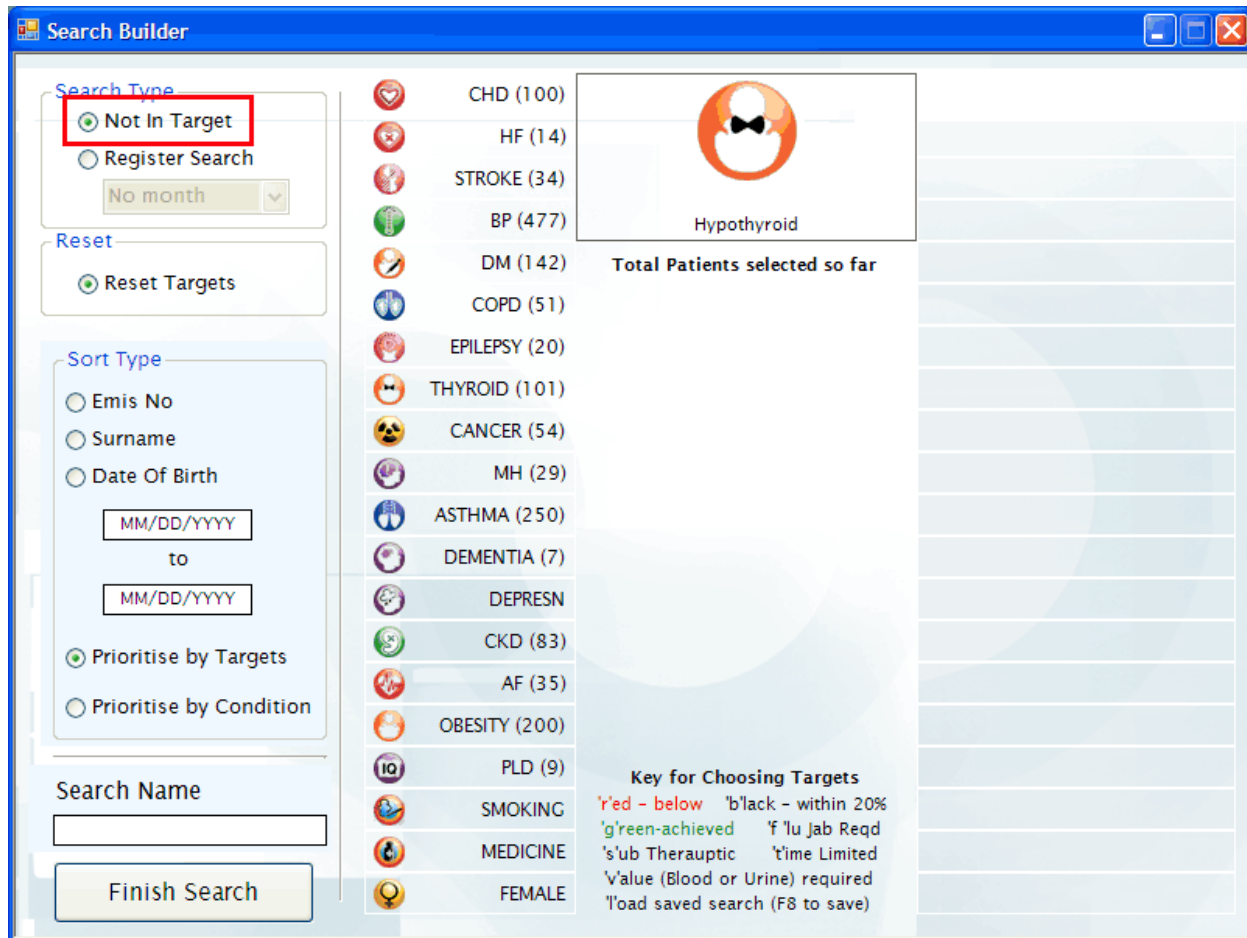
Check your own copy of EMIS Population Manager to see what yours is set to.

NOTE: If you change the look ahead view in PopMan, please allow until the following day for PatientChase to reflect these changes.

Step 2 – Add a new search

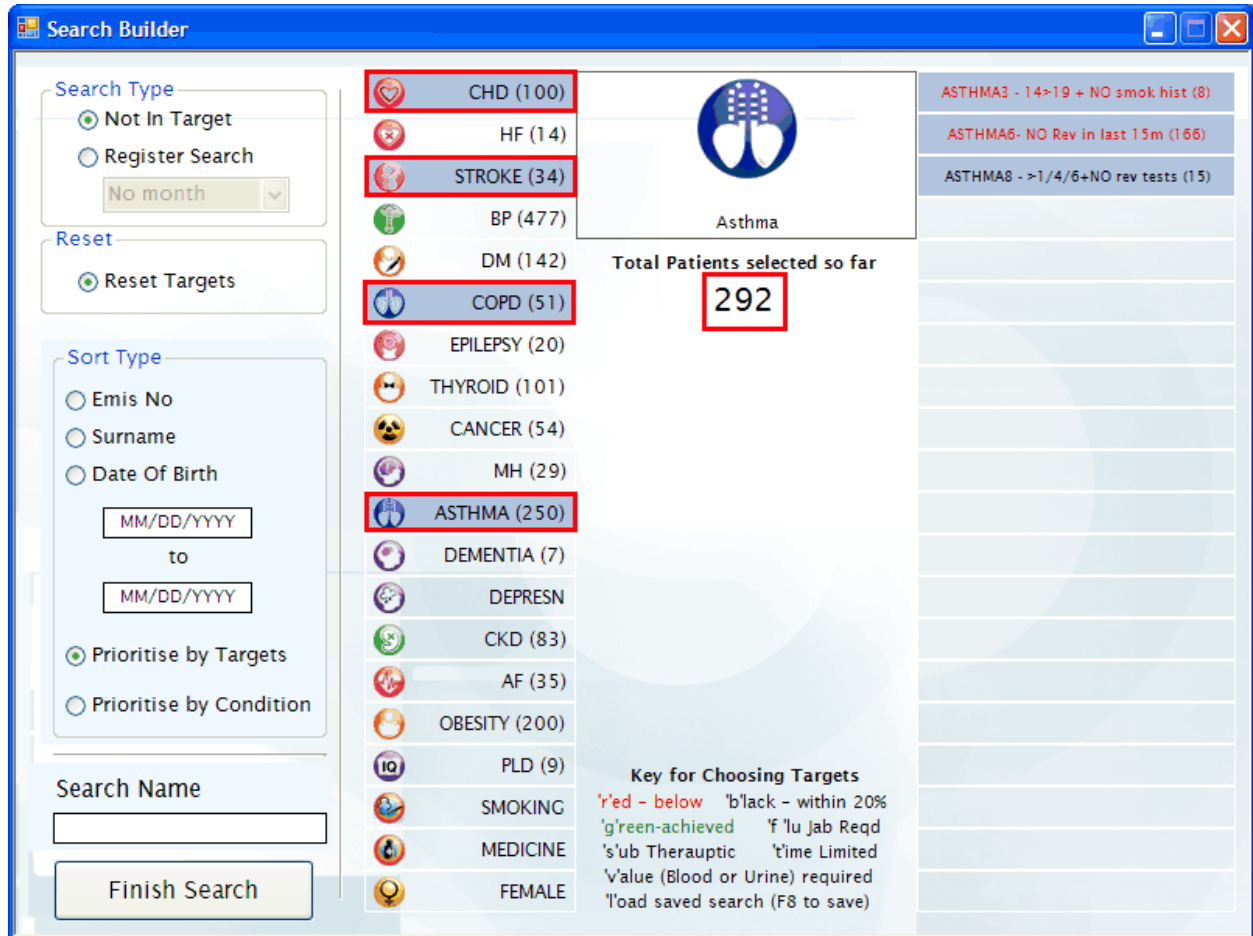


Step 3 – ‘Select Not in Target’ search



Numbers of patients within each register will be displayed by each register name.

Step 4 – Select your targets

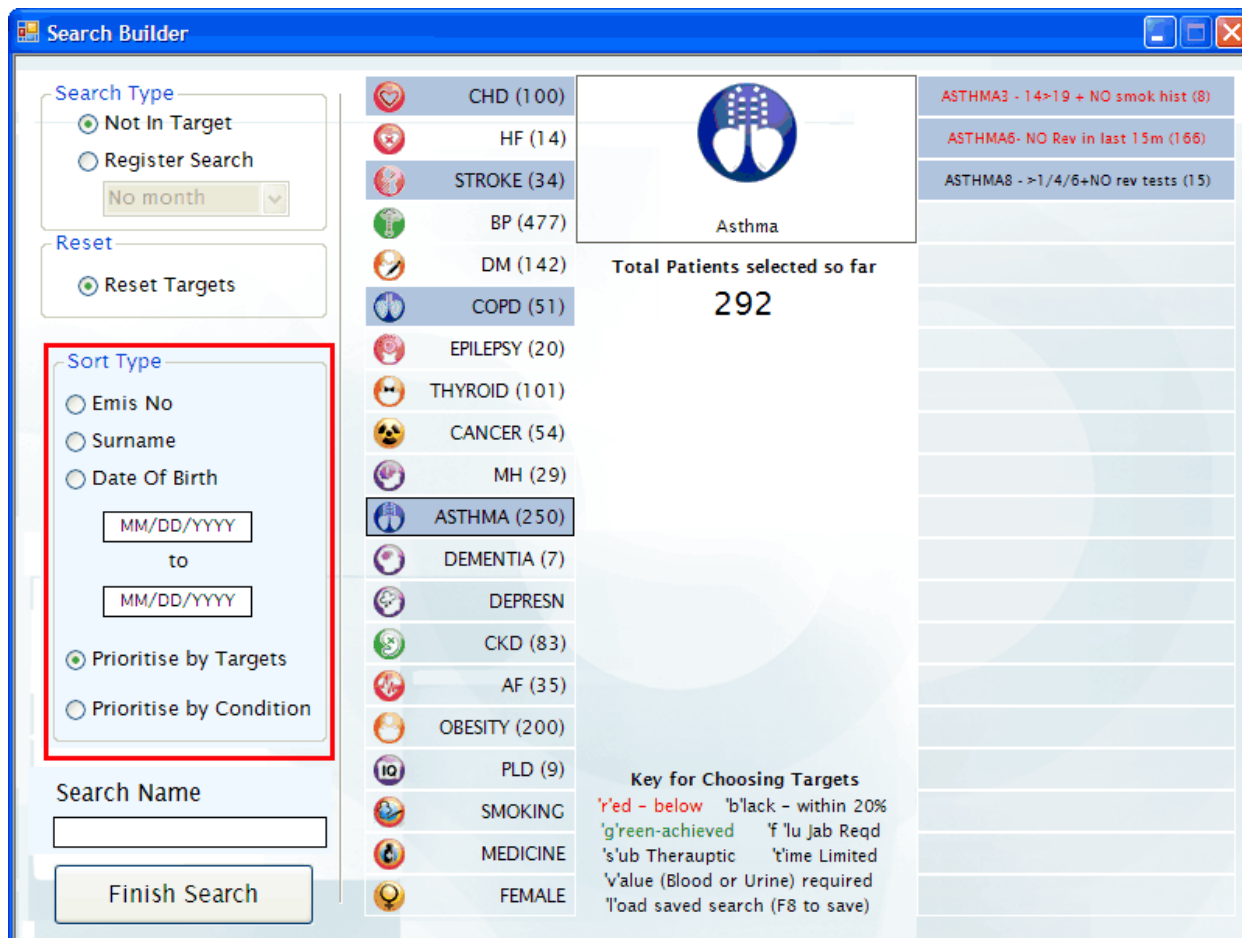


In this example, CHD, Stroke, COPD and Asthma patients were selected to form the group of patients to be identified.

PatientChase found there 292 patients within this group.

Some of these patients will have targets in maybe 2, 3 or even 4 of the conditions selected.

Step 5 – Determine the sort order to view your results.



Before viewing the list of patients in your search, decide what order you’d like them displayed in.

By default, ‘prioritise by targets’ is selected as this is the most popular among surgeries.

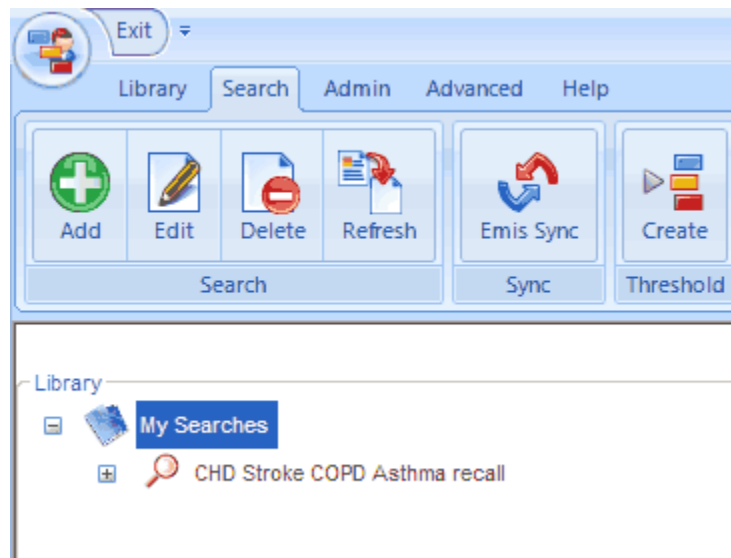
What this means is that the ‘most complex’ patients will be displayed at the top of your results and therefore appear first when you export to Excel.

Step 6 – Name your search and click Finish

The screenshot shows the 'Search Builder' window with the following elements:

- Search Type:**
 - Not In Target
 - Register Search (with a 'No month' dropdown)
- Reset:**
 - Reset Targets
- Sort Type:**
 - Emis No
 - Surname
 - Date Of Birth (with MM/DD/YYYY input fields)
 - Prioritise by Targets
 - Prioritise by Condition
- Search Name:** A text field containing 'CHD Stroke COPD Asthma recal' is highlighted with a red box.
- Finish Search:** A button located below the search name field is also highlighted with a red box.
- Conditions List:** A vertical list of conditions with counts: CHD (100), HF (14), STROKE (34), BP (477), DM (142), COPD (51), EPILEPSY (20), THYROID (101), CANCER (54), MH (29), **ASTHMA (250)**, DEMENTIA (7), DEPRESN, CKD (83), AF (35), OBESITY (200), PLD (9), SMOKING, MEDICINE, FEMALE.
- Target Summary:** A box titled 'Asthma' shows 'Total Patients selected so far' as 292.
- Key for Choosing Targets:**
 - 'red - below
 - 'black - within 20%
 - 'green-achieved
 - 'lu Jab Reqd
 - 'sub Therapeutic
 - 'time Limited
 - 'value (Blood or Urine) required
 - 'load saved search (F8 to save)
- Target Filters:**
 - ASTHMA3 - 14>19 + NO smok hist (8)
 - ASTHMA6- NO Rev in last 15m (166)
 - ASTHMA8 - >1/4/6+NO rev tests (15)

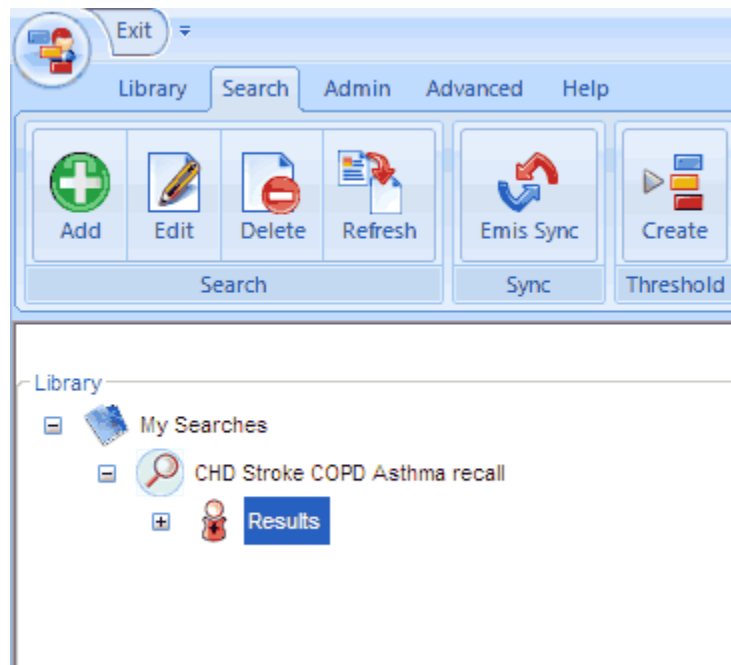
Step 7 – Loading your results



Click the + sign next to 'My Searches'.

Next:


Click the + sign next to the name of your search.



Next, click on the word 'Results'.


Step 8 – Viewing your results

DateIns	Conditions	CHD	STROKE	COPD	ASTHMA	SurName	FirstNames	EmisN	Title	S	DateOfBirth	NHSNu
1	STROKE,COPD,ASTHM		STROKE	COPD	ASTHMA	Channon	Laura	24181	Mr	M	15/07/1982	5013942
2	CHD,ASTHMA	CHD			ASTHMA	Beech	Ilona	25964	Mrs	F	18/11/1951	1754920
3	CHD,COPD,ASTHMA	CHD		COPD	ASTHMA	Munns	Pierre	25249	Mr	M	23/06/1940	1843360
4	CHD,COPD	CHD		COPD		Crilly	Bridget	21765	Mrs	F	20/11/1957	6827250
5	CHD,STROKE	CHD	STROKE			Alexandroff	Carmen	19633	Mrs	F	11/09/1959	5775188
6	STROKE		STROKE			Mytko	Reid	23034	Mrs	F	03/12/1926	8896010
7	CHD	CHD				Martyn	Joel	10812	Mrs	F	27/03/1971	6452658
8	CHD,COPD	CHD		COPD		Bream	Ping	11143	Mr	M	08/11/1961	1152554
9	CHD,COPD	CHD		COPD		Macvean	Maryanne	8693	Mr	M	24/10/1933	7986997
10	CHD	CHD				Manzoor	Tomas	23757	Mrs	F	30/04/1933	5957864
11	STROKE		STROKE			Herring	Wesley	6017	Mr	M	17/09/1937	7099712
12	COPD,ASTHMA			COPD	ASTHMA	Juerss	Katie	22179	Mrs	F	01/10/1967	2037281
13	CHD	CHD				Rousseau	Hossein	131	Mr	M	02/03/1940	0637376
14	STROKE		STROKE			Cockrell	Bruno	24172	Mrs	F	15/10/1946	5165842
15	ASTHMA				ASTHMA	Kelly	Annette	25448	Mr	M	09/10/1985	1945938
16	STROKE		STROKE			Backhouse	Terrence	24419	Mr	M	19/05/1925	6794148
17	CHD	CHD				Wakefield	Nasser	1181	Mr	M	01/05/1961	8362208
18	CHD	CHD				Mynett	Nellie	3256	Mrs	F	28/02/1933	6011158
19	CHD	CHD				Craven	Bonita	23375	Mrs	F	28/07/1948	7272658
20	CHD	CHD				Cullum	Ffion	3733	Mrs	F	17/05/1931	7033598
21	CHD	CHD				Pick	Briaitte	20882	Mr	M	29/05/1979	9091544



Date of Search: 07/12/2011
Search :Not in Target
:Sorted by Target

Emis No :24181
Patient Name:Mr Laura Channon
Address :Flat 5 Blackberry Lane Witney
Surrey CR0 4UN
TelNo :84012267



Mr Laura Channon

STROKE6 - BP 150/90 or less
STROKE7 - Cholesterol check in 15m
STROKE8 - Cholesterol 5,0mmol/l
COPD10 - FEV1 in last 15m
COPD13 - Had a MRC Scoring
ASTHMA6 - Rev in last 15m

Your results will be displayed in the order you specified in Step 5.

Details for the highlighted patient will be shown in the 2 boxes below the list (in this example the patient on Row 1 is highlighted).

Notice PatientChase has identified the patient has QOF targets in Stroke, COPD and Asthma.

Clicking on any other patient will display their relevant targets.

Step 9 – Exporting your results to Excel

The screenshot shows the PatientChase software interface. At the top, there is a navigation bar with 'Exit', 'Library', 'Search', 'Admin', 'Advanced', and 'Help'. Below this is a toolbar with icons for 'Edit', 'Emis Inserts', 'Check for Updates', and 'Review Date'. The main area is divided into a left sidebar and a main content area. The sidebar shows a tree view under 'My Searches' with a search named 'CHD Stroke COPD Asthma recall'. A context menu is open over the 'Results' folder, with 'Export Search Results To Excel' highlighted. The main content area displays a table of search results with columns for 'Date/Ins', 'Conditions', 'CHD', 'STROKE', 'COPD', 'ASTHMA', 'SurName', 'FirstNames', and 'EmisN TID'. Below the table, there are two summary boxes. The left box shows search details for 'Date of Search: 07/12/2011' and 'Total Patients in Search: 292'. The right box shows details for 'Mrs Ilona Beech', including her conditions and contact information.

Date/Ins	Conditions	CHD	STROKE	COPD	ASTHMA	SurName	FirstNames	EmisN TID
1	STROKE,COPD,ASTHM		STROKE	COPD	ASTHMA	Channon	Laura	24181 Mr
2	CHD,ASTHMA	CHD			ASTHMA	Beech	Ilona	25964 Mrs
3	CHD,COPD,ASTHMA	CHD		COPD	ASTHMA	Munns	Pierre	25249 Mr
4	CHD,COPD	CHD		COPD		Crilly	Bridget	21765 Mrs
5	CHD,STROKE	CHD	STROKE			Alexandroff	Carmen	19633 Mrs
6	STROKE		STROKE			Mytko	Reid	23034 Mrs
7	CHD	CHD				Martyn	Joel	10812 Mrs
8	CHD,COPD	CHD		COPD		Bream	Ping	11143 Mr
9	CHD,COPD	CHD		COPD		Macvean	Maryanne	8693 Mr
10	CHD	CHD				Manzoor	Tomas	23767 Mrs
11	STROKE		STROKE			Herring	Wesley	6017 Mr
12	COPD,ASTHMA			COPD	ASTHMA	Juerrs	Katie	22179 Mrs
13	CHD	CHD				Rousseau	Hossein	131 Mr
14	STROKE		STROKE			Cockrell	Bruno	24172 Mrs
15	ASTHMA				ASTHMA	Kelly	Annette	25448 Mr
16	STROKE		STROKE			Backhouse	Terrence	24419 Mr
17	CHD	CHD				Wakefield	Nasser	1181 Mr
18	CHD	CHD				Mynett	Nellie	3266 Mrs
19	CHD	CHD				Craven	Bonita	23375 Mrs
20	CHD	CHD				Cullum	Ffion	3733 Mrs
21	CHD	CHD				Pick	Briaitte	20882 Mr

Right click over the word 'Results' and select 'Export Search Results to Excel'.

This process will export this list to Excel.

Example:

	A	B	C	D	E	F	G	H	I	
1	EmisNo	SurName	FirstName	Street	Town	County	PostCode	HomeTelepho	Conditions	CH
2	24181	Channon	Laura	Blackberry Lane	Witney	Surrey	CR0 4UN	84012267	STROKE,COPD,ASTHMA	
3	25964	Beech	Ilona	Yam Crescent	Chepstow	Surrey	SM6 0AB	0208 647 7948	CHD,ASTHMA	CH
4	25249	Munns	Pierre	Gazelle Drive	Wallsend	Surrey	SM6 8HN	0208 647 6030	CHD,COPD,ASTHMA	CH
5	21765	Crilly	Bridget	Redcurrant Street	Perth	Surrey	SM6 7BP	0208 669 9294	CHD,COPD	CH
6	19633	Alexandrc	Carmen	Apple Street	Ely	Surrey	SM6 9BN	07951 341 665	CHD,STROKE	CH
7	23034	Mytko	Reid	Yam Drive	Stevenage	Surrey	SM6 0AS	020 8669 7454	STROKE	
8	10812	Martyn	Joel	Moose Avenue	Newtown	Surrey	SM5 2EN	8669 1235	CHD	CH
9	11143	Bream	Ping	Mauve Lane	Leeds	Surrey	CR0 4QZ	688 6498	CHD,COPD	CH
10	8693	Macvean	Maryanne	Elderflower Close	Leek	Surrey	SM6 7JF	647 5967	CHD,COPD	CH
11	23757	Manzoor	Tomas	Cow Parkway	Salford	Surrey	CR0 4UB	686 4554	CHD	CH
12	6017	Herring	Wesley	Potato Close	Newquay	Surrey	SM5 2RP	641 7152	STROKE	
13	22179	Juerrs	Katie	Rabbit Drive	Stamford	Surrey	SM6 8BT	8395 8461	COPD,ASTHMA	
14	131	Rousseau	Hossein	Beech Avenue	Leeds	Surrey	SM6 7NT	773 4016	CHD	CH
15	24172	Cockrell	Bruno	White Road	Sandhurst	Surrey	SM5 2ED	7841473638	STROKE	
16	25448	Kelly	Annette	Blackcurrant Road	Chepstow	Surrey	SM6 6DW	0208 669 9727	ASTHMA	
17	24419	Backhouse	Terrence	Gorilla Parkway	Luton	Surrey	SM6 8HN	0208 395 8334	STROKE	
18	1181	Wakefield	Nasser	Hawthorn Street	Eastbourne	Surrey	SM6 9BN	669 8191	CHD	CH
19	3256	Mynett	Nellie	Monkey Close	Woolacombe	Surrey	SM5 3SU	8395 7111	CHD	CH
20	23375	Craven	Bonita	Turnip Crescent	Yeovil	Surrey	SM6 8BD	395 9684	CHD	CH
21	3733	Cullum	Ffion	Carrot Lane	Troon	Surrey	CR0 4UJ	688 1073	CHD	CH
22	20882	Pick	Brigitte	Redcurrant Street	Londonderry	Surrey	SM6 8HQ	773 9521	CHD	CH
23	6176	Till	Kazim	Orange Approach	Rochester	Surrey	SM6 9RQ	8401 1969	CHD	CH
24	7333	Hendricks	Marta	Copper Drive	York	Surrey	SM6 0TZ	395 5524	CHD	CH
25	8690	Hamlin	Alfred	Horse Drive	Paisley	Surrey	SM6 8BD	7926601642	STROKE	
26	7887	Spratt	Liane	Lettuce Lane	Stockport	Surrey	SM6 8EG	647 5924	CHD	CH
27	20966	Bennigser	Bing	Raspberry Close	Wick	Surrey	SM6 9ER	647 6681	COPD,ASTHMA	
28	20717	Restori	Sheila	White Parkway	Portland	Surrey	CR0 4HD	0208 666 0441	CHD	CH
29	5692	Sturt	L	Apple Drive	Sandhurst	Surrey	CR8 3PX	668 8789	CHD	CH
30	8735	Ide	Brittany	Cheetah Avenue	Wareham	Surrey	SM6 8SU	647 6742	COPD,ASTHMA	
31	24219	Mayell	Karyn	Beech Street	Torpoint	Surrey	SM5 3DH	647 2869	CHD	CH
32	24456	Nicholas	Melinda	Fir Drive	Slough	Surrey	SM6 7PB	0208 773 8853	CHD	CH
33	8547	Bergan	Clio	Parsnip Street	Yeovil	Surrey	SM6 9DY	0208 395 3019	STROKE	

The spreadsheet in the image above is cropped on the right hand side. The full spreadsheet would show all the patient’s outstanding targets and conditions.