



# User Guide

Version 2.0

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## Tips

There are various tips on using PatientChase on our website.

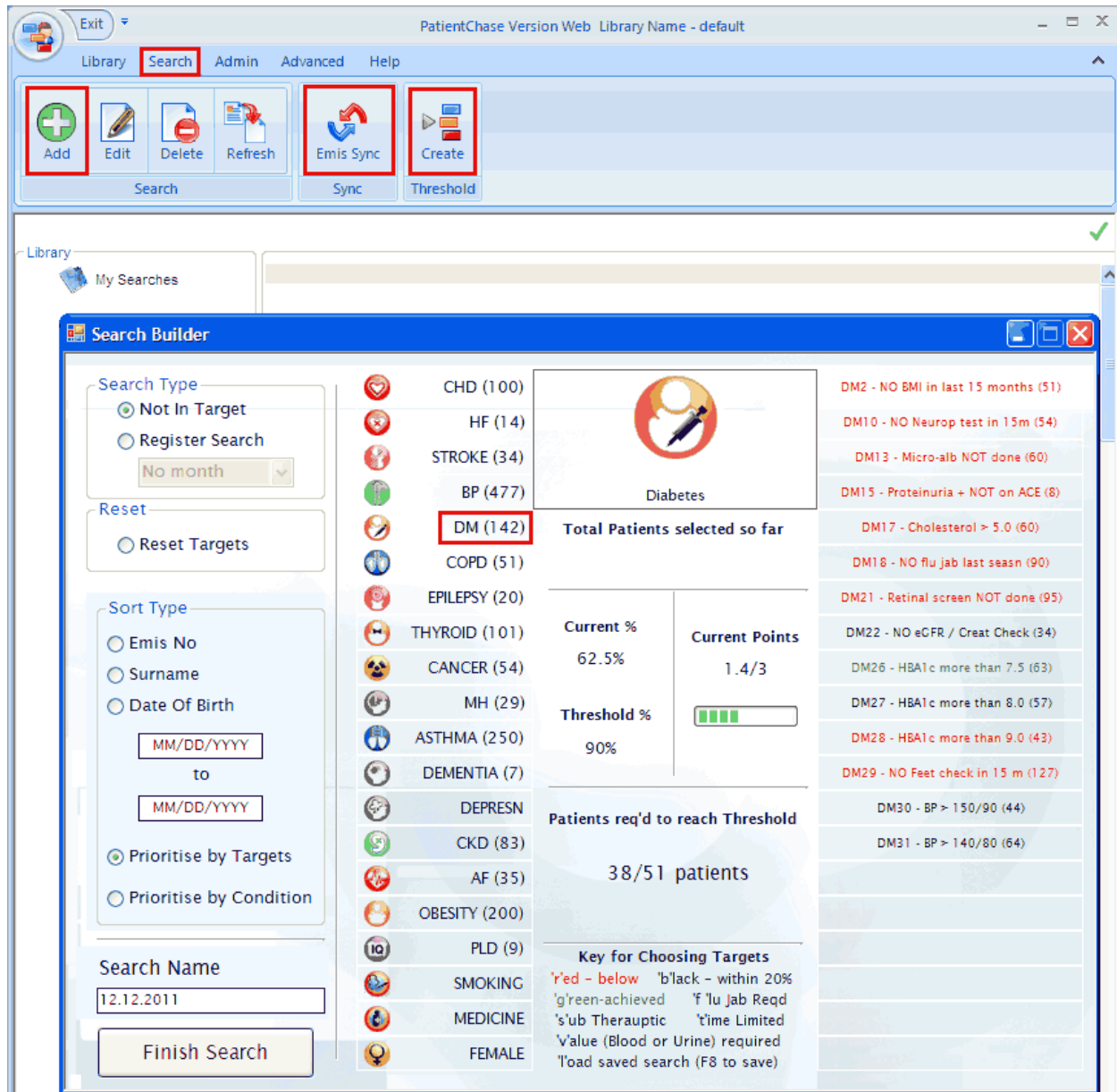
Visit [www.patientchase.com/?cat=3](http://www.patientchase.com/?cat=3) for additional help.

## The main menus and screens of PatientChase

This section helps you:

- Familiarise yourself with the main menus and screens of PatientChase:
  - Search menu
  - Library menu
  - Admin menu
  - Advanced menu
  - Results views

## Creating a Search

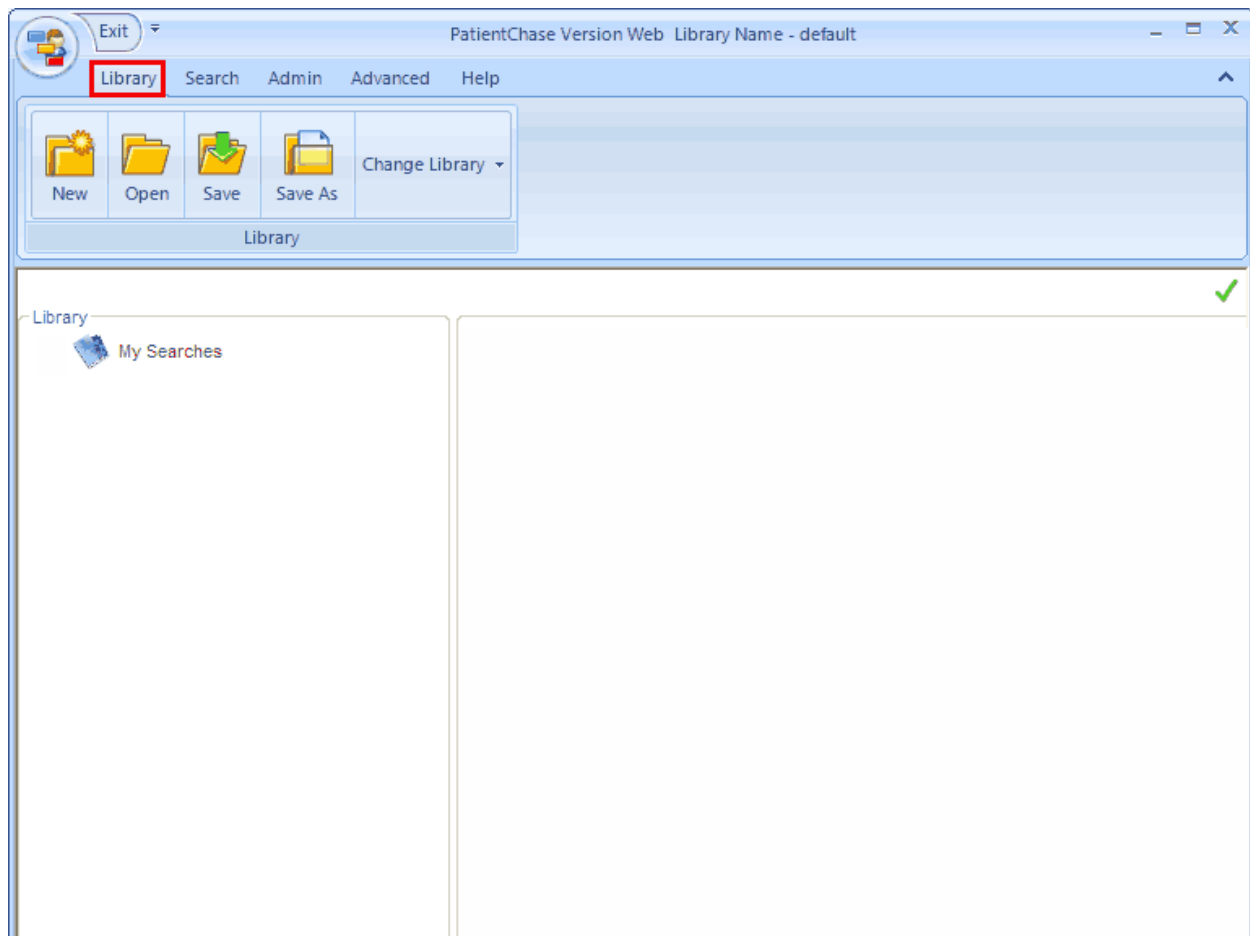


The Search menu gets you started.

From here you can:

- Sync the latest EMIS data with PatientChase.
- Create a new search. Click the Add button and the Search Builder screen loads up.
- Run a Threshold search. This is a prebuilt search which looks at ALL the QOF targets where your practice has not yet achieved the threshold %.

## Your Library



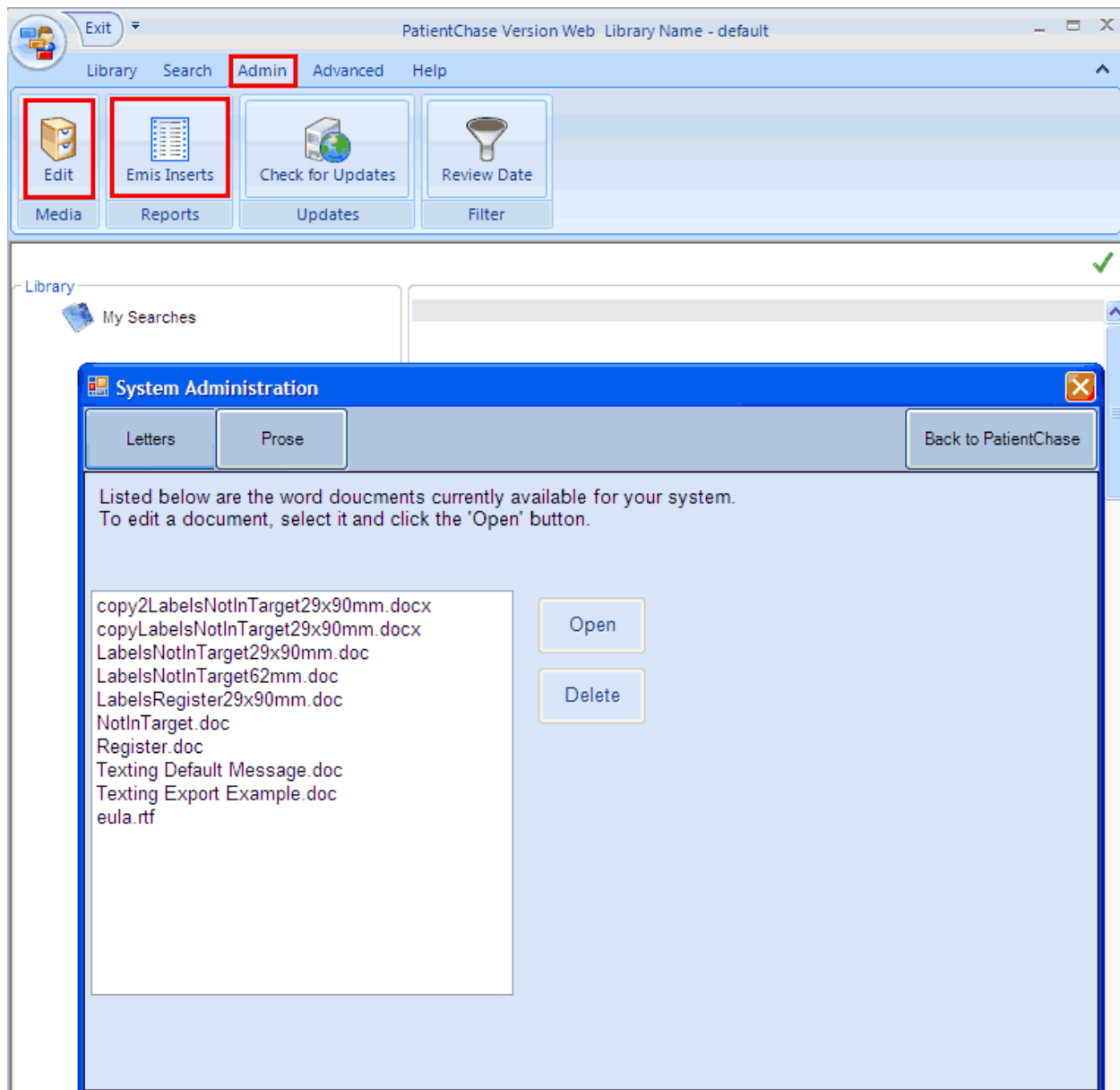
By default, PatientChase automatically creates a default library for you on your hard drive and a prompt asks you whether you wish to save it whenever you exit PatientChase.

Only use the Library menu if you plan to change the location of where you save your searches.

From here you can:

- Create a new library.
- Change the location of your library.
- Share a library over your network.

## The Admin menu

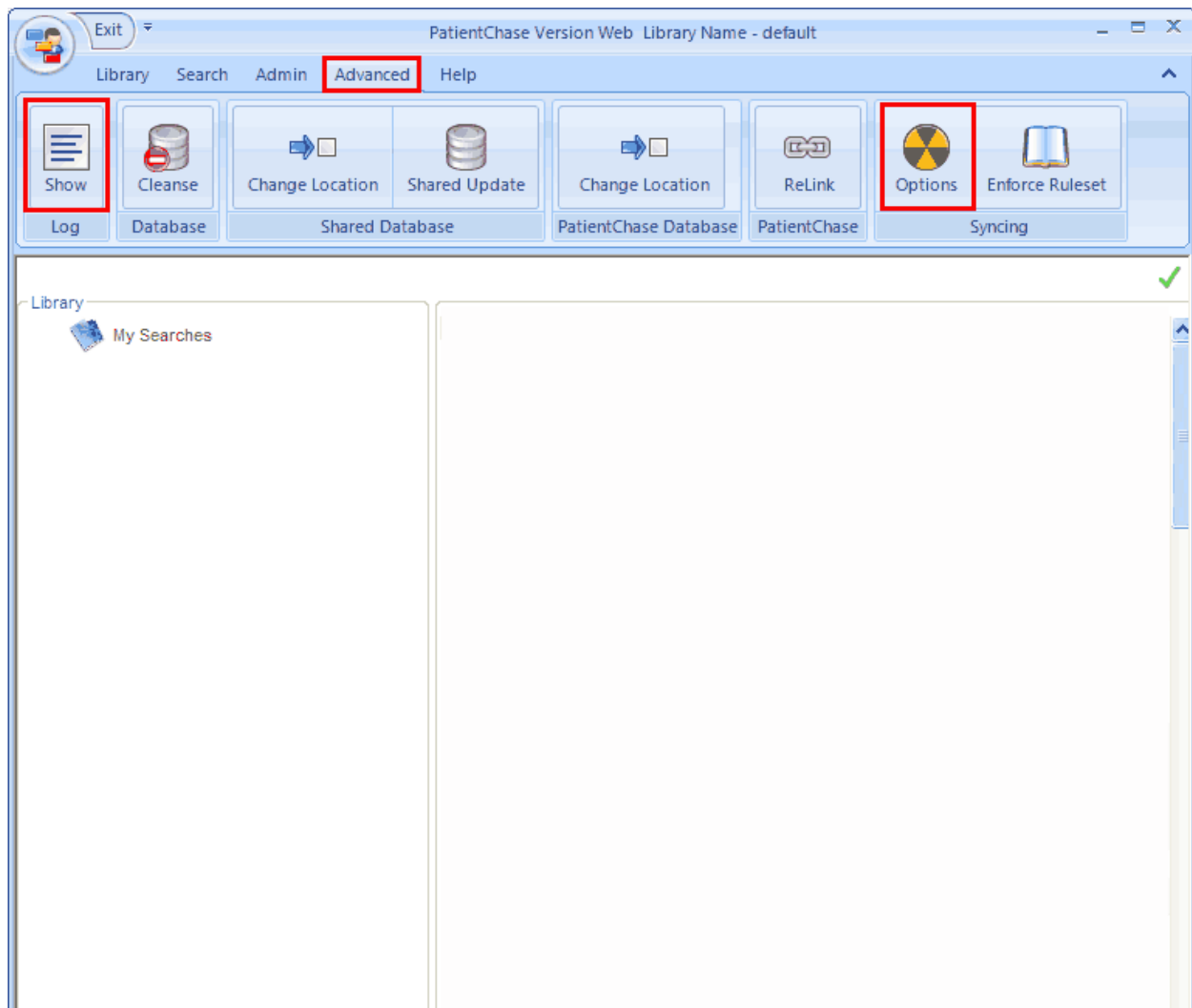


This menu is where you customise PatientChase and run reports.

From here you can:

- Customise you letter template/s.
- Customise your label template/s.
- Report on letters inserted into EMIS.

## Advanced (Support staff only)



The Advanced menu is primarily for use by PatientChase Support for diagnostics.

From here you can:

- Reconfigure PatientChase if you are using a version of Microsoft Word older than Word 2007. Go to the Options menu to do this.
- Create the log file for sending to [support@patientchase.com](mailto:support@patientchase.com) should an error occur in PatientChase.

## Results views

The screenshot shows the PatientChase software interface. At the top, there's a menu bar with 'Library', 'Search', 'Admin', 'Advanced', and 'Help'. Below the menu is a toolbar with icons for 'Add', 'Edit', 'Delete', 'Refresh', 'Emis Sync', and 'Create'. The main area displays a table of search results. A context menu is open over the first result, listing options like 'Delete Search', 'Export Search Results To Excel', and 'Export Results to Word ONLY'. Below the table, there are two summary boxes: one for the search criteria and total patients (292), and another for the selected patient, Mr Laura Channon, showing her medical conditions and vital signs.

DateIns	Conditions	CHD	STROKE	COPD	ASTHMA	SurName	FirstNames	EmisN	Title
1	STROKE,COPD,ASTHM		STROKE	COPD	ASTHMA	Channon	Laura	24181	Mr
2	CHD,ASTHMA	CHD			ASTHMA	Beech	Ilona	25964	Mrs
	D,COPD,ASTHMA	CHD		COPD	ASTHMA	Munns	Pierre	25249	Mr
	D,COPD	CHD		COPD		Crilly	Bridget	21766	Mrs
	D,STROKE	CHD	STROKE			Alexandroff	Carmen	19633	Mrs
	ROKE		STROKE			Mytko	Reid	23034	Mrs
		CHD				Martyn	Joel	10812	Mrs
	D,COPD	CHD		COPD		Bream	Ping	11143	Mr
	D,COPD	CHD		COPD		Macvean	Maryanne	8693	Mr
		CHD				Manzoor	Tomas	23757	Mrs
	ROKE		STROKE			Herring	Wesley	6017	Mr
	PD,ASTHMA			COPD	ASTHMA	Juerss	Katie	22179	Mrs
		CHD				Rousseau	Hossein	131	Mr
	ROKE		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	3256	Mrs
19	CHD	CHD				Craven	Bonita	23375	Mrs
20	CHD	CHD				Cullum	Ffion	3733	Mrs
21	CHD	CHD				Pick	Briaitte	20882	Mr

Once you've built a search, **right click** over its name to be presented with a set of options.

From here you can:

- Modify the search.
- Print letters and record them in EMIS.
- Export data to Excel.
- Create Repeat Prescriptions recall labels.

The screenshot shows the PatientChase software interface. At the top, there is a menu bar with 'Exit', 'Library', 'Search', 'Admin', 'Advanced', and 'Help'. Below the menu bar is a toolbar with icons for 'Add', 'Edit', 'Delete', 'Refresh', 'Emis Sync', and 'Create'. The main area displays a table of search results with columns for 'DatelnS', 'Conditions', 'CHD', 'STROKE', 'COPD', 'ASTHMA', 'SurName', 'FirstNames', 'EmisN', and 'Title'. A context menu is open over the table, listing options such as 'Export Selected Patients to Word ONLY', 'Insert Selected Patients to EMIS ONLY', 'Export to Word AND Insert into EMIS', 'Select Patients from Excel Export', 'Inverse Patients Selected', and 'Delete Patients from Search'. Below the table, there is a patient details panel for 'Mr Laura Channon' with a 'Date of Search: 08/12/2011' and 'Total Patients in Search: 292'.

DatelnS	Conditions	CHD	STROKE	COPD	ASTHMA	SurName	FirstNames	EmisN	Title
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						Maryanne	8693	Mr
10	CHD						Tomas	23767	Mrs
11	STROKE						Wesley	6017	Mr
12	COPD,ASTHMA						Katie	22179	Mrs
13	CHD						Hossein	131	Mr
14	STROKE						Bruno	24172	Mrs
15	ASTHMA						Annette	25448	Mr
16	STROKE		STROKE			Backhouse	Terrence	24419	Mr
17	CHD	CHD				Wakefield	Nasser	1181	Mr
18	CHD	CHD				Mynett	Nellie	3256	Mrs
19	CHD	CHD				Craven	Bonita	23375	Mrs
20	CHD	CHD				Cullum	Ffion	3733	Mrs
21	CHD	CHD				Pick	Briaitte	20882	Mr

Right clicking over the patient grid gives you some other options.

From here you can:

- Filter your search with other search criteria (e.g. housebounds).
- Manually select patients then print letters and record them in EMIS.
- Auto-delete or manually delete patients from your search.

## Creating a letter template

In this section you will be shown how to:

- Modify a preloaded PatientChase letter template with your preferences.

MODIFY YOUR LETTER TEMPLATE BEFORE YOU START CREATING MAIL MERGES.

PatientChase is preloaded with 2 main letter templates. One to use as the basis for your QOF letters and an alternative one if you recall your patients using month of birth.

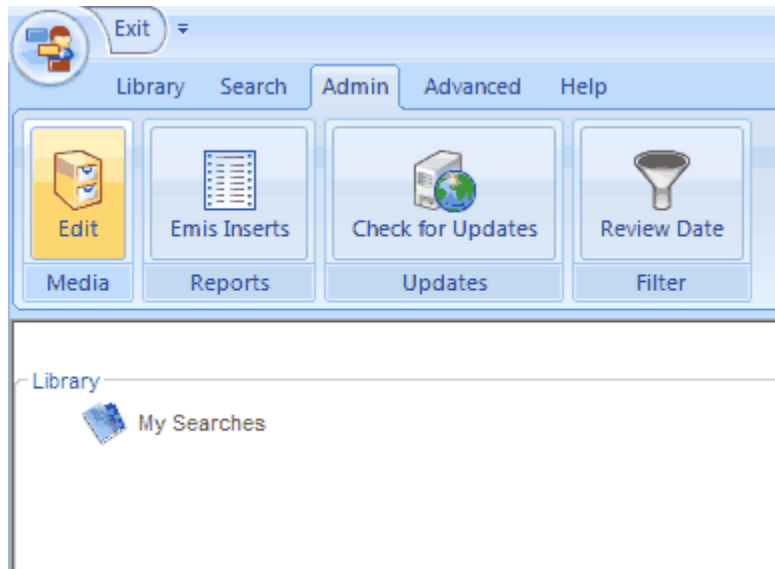
Both templates are fully customisable and this section shows you how to add your own practice header, your own wording and alter the automated prose in some of the merge fields.

**This section uses the QOF letter template as the example. If you prefer to recall via month of birth, follow exactly the same steps, except:**

Step 2 - select the register.doc template.

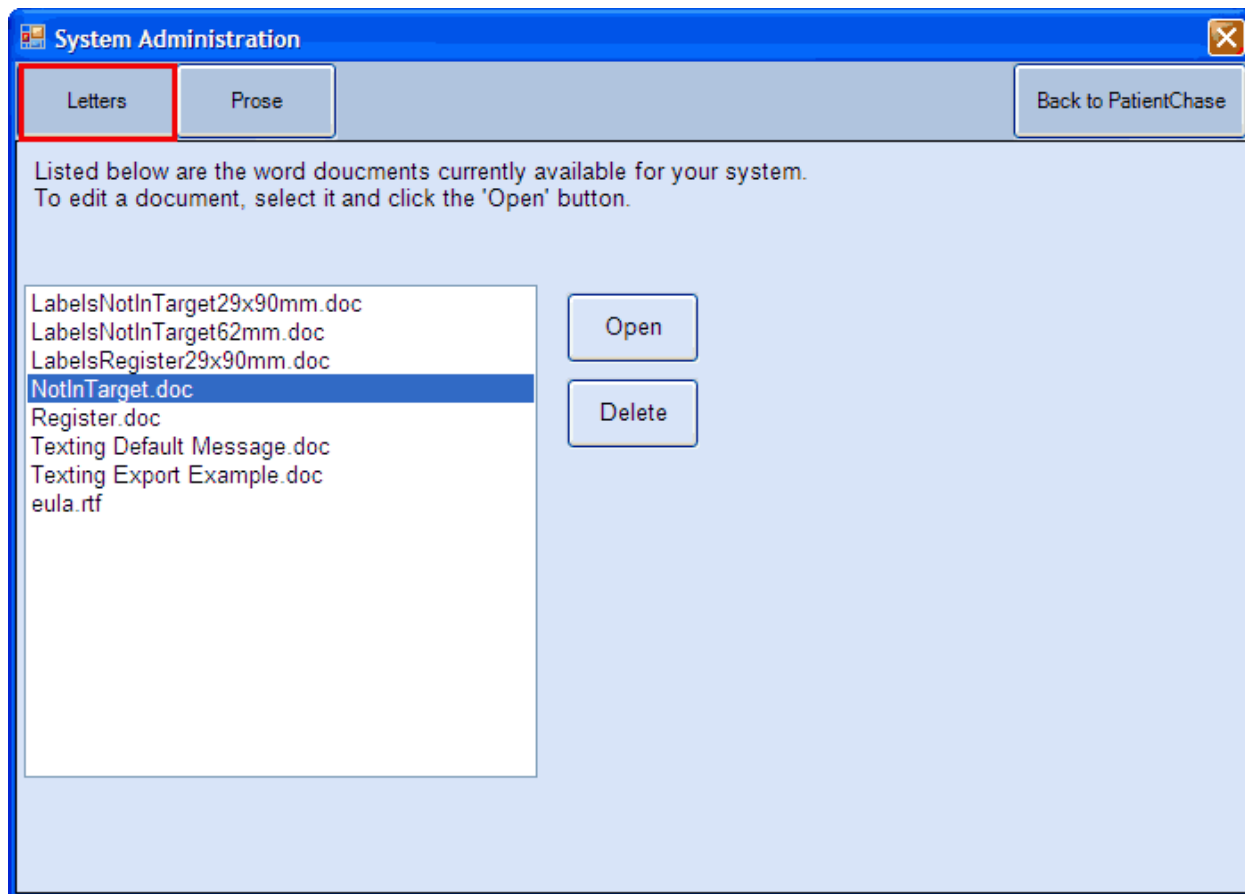
Step 4 – decide whether you wish to modify the terms in the [Condition] field only.

Step 1 – Open System Administration



To do this, go to the Admin menu then click 'Edit'.

Step 2 – Select the 'Letters' tab.



Click on NotInTarget.doc.

Click Open.

The template opens in Microsoft Word.

Step 3 – Modifying the wording in Microsoft Word.



In the example above a practice letterhead and signature has already been added. You'll need to add your own. You can simply copy and paste one from any of your Word documents.

If you wish to change the wording or layout of the template, feel free to do so.

Once you're happy with your template click Save.

Step 4 – Modifying the [Condition] and [Text] fields.

Dear [Salutation],

This is an automated letter. As of the [DateToday] our records show that:-

[Condition]

[Text]

If you are already seeing a doctor or nurse regarding the above or have a further appointment please ignore this letter and treat it for information only.

If you are not under any active appointment either with the nurse, doctor or hospital...

The [Condition] field tells the patient which condition they are being recalled for.

The [Text] field details which QOF targets apply to the patient.

This is how the [Condition] and [Text] fields can look in a mail merged letter:

Dear Mrs. Beech,

This is an automated letter. As of the 07/12/2011 our records show that:-

You have a history of a heart related condition.  
You have a history of Asthma.

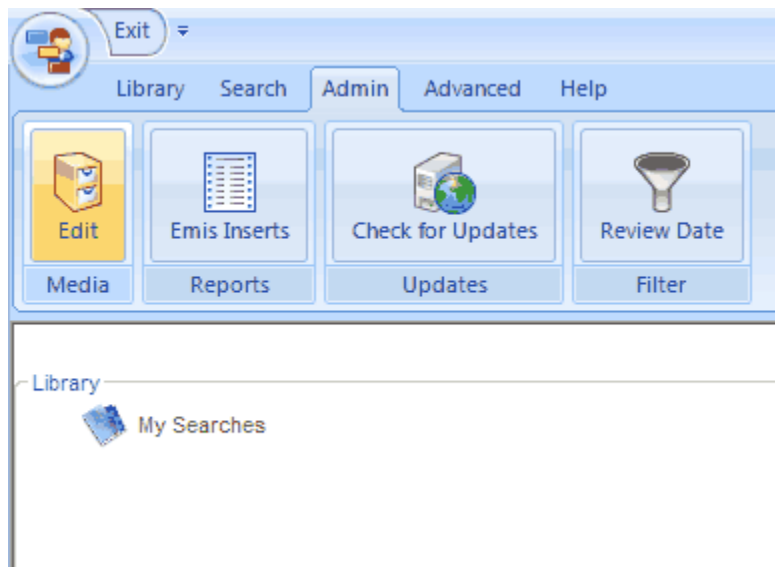
Your last Blood Pressure reading was too high.  
You should be on Medication to help thin the blood.  
You might need to be on a drug called a Beta Blocker.  
You have not had a review recently for your condition.  
Your Asthma needs to be confirmed with a lung test.

If you are already seeing a doctor or nurse regarding the above or have a further a

Should you wish to remove either merge field from your template, simply delete it in Step 3.

Should you wish to keep either field, but change the wording, do the following:

Open System Administration by going to the Admin menu then clicking 'Edit'.



Click on the 'Prose' tab.

System Administration

Letters **Prose** Back to PatientChase

Amend the short text (for Labels and Texting) or Prose (for Letters).

Target	Type	Short Text	Prose for Letters
AF1 - Patients on AF Register	Register	Irregular Heart Beat	You have a history of an irregular heart.
AF3 - AF on Anticoagulation	NotInTarget	Medication	You should be on Medication to help thin the blood.
AF4 - New AF with ECG	NotInTarget	Irregular Heart Beat	You have recently been diagnosed as having an irregular heart beat not confirmed on a Heart Monitor.
ASTHMA1 - Patients on Asthma register	Register	Asthma	You have a history of Asthma.
ASTHMA3 - 14>19 + smoking history	NotInTarget	Smoking Status	Your Smoking Status has not been recorded recently.
ASTHMA6- Rev in last 15m	NotInTarget	Asthma	You have not had a review recently for your condition.
ASTHMA8 - >1/4/06+ rev testing	NotInTarget	Asthma	Your Asthma needs to be confirmed with a lung test.
BP1 - Patients on BP Register	Register	Blood Pressure	You have a history of High Blood Pressure and are on Medication for this.
BP4 - BP check in last 9 months	NotInTarget	Blood Pressure	Your Blood Pressure has not been recorded recently.
BP5 - BP 150/90 or less	NotInTarget	Blood Pressure	Your last Blood Pressure reading was too high.
CANCER1 - On Cancer Register >1/4/03	Register	Cancer	Have had a diagnosis of Cancer in the last few years.
CANCER3 -Cancer Rev from diagnosis	NotInTarget	Cancer	You have not had a cancer review recently.

In the 'Prose for Letters' column click on the term you wish to change and retype the entry. Run through the list to see if you wish to change any other terms.

**If you are running month of birth letters, focus only the Register terms appearing in the 'Type' column.**

Once you're happy with all the terms that could appear on your letters, click 'Back to PatientChase'.

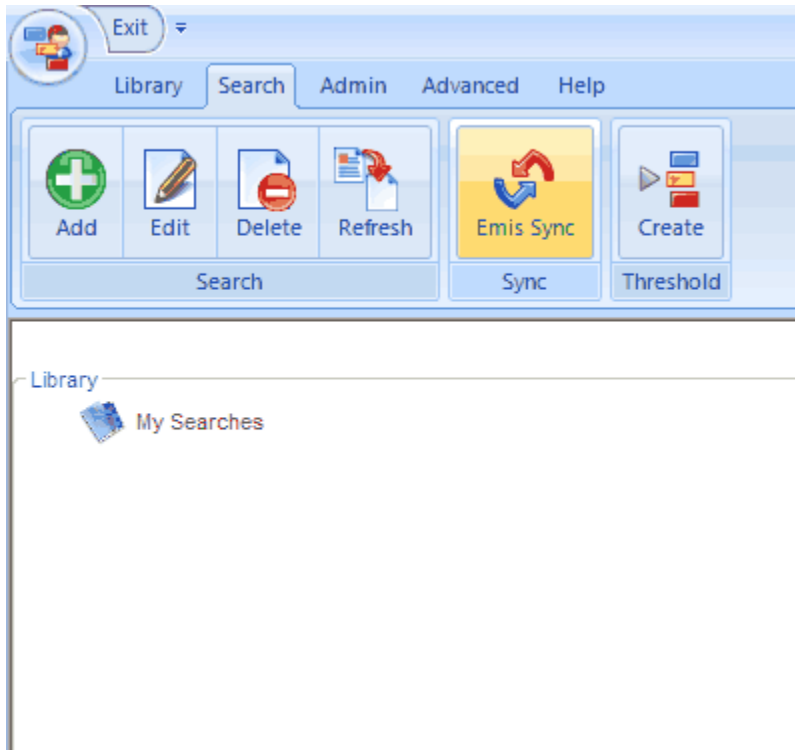
From now on, your modified terms will appear on your patient letters.

## Mail Merging – Creating QOF letters

In this section you will be shown how to:

- Create QOF patient invite letters ready to send to patients.

## 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.

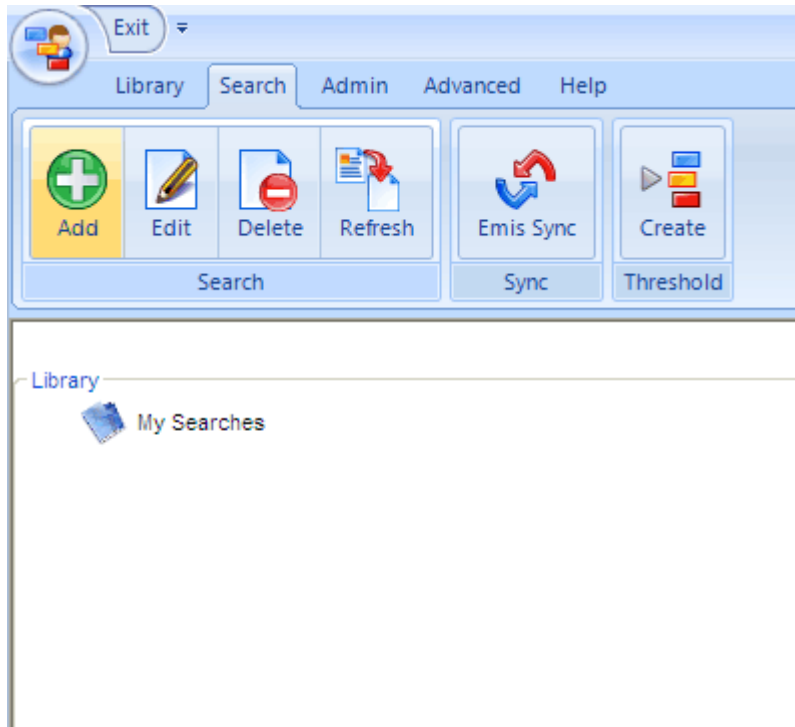
PatientChase uses the same data as EMIS Population Manager's **LOOK AHEAD** view.

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

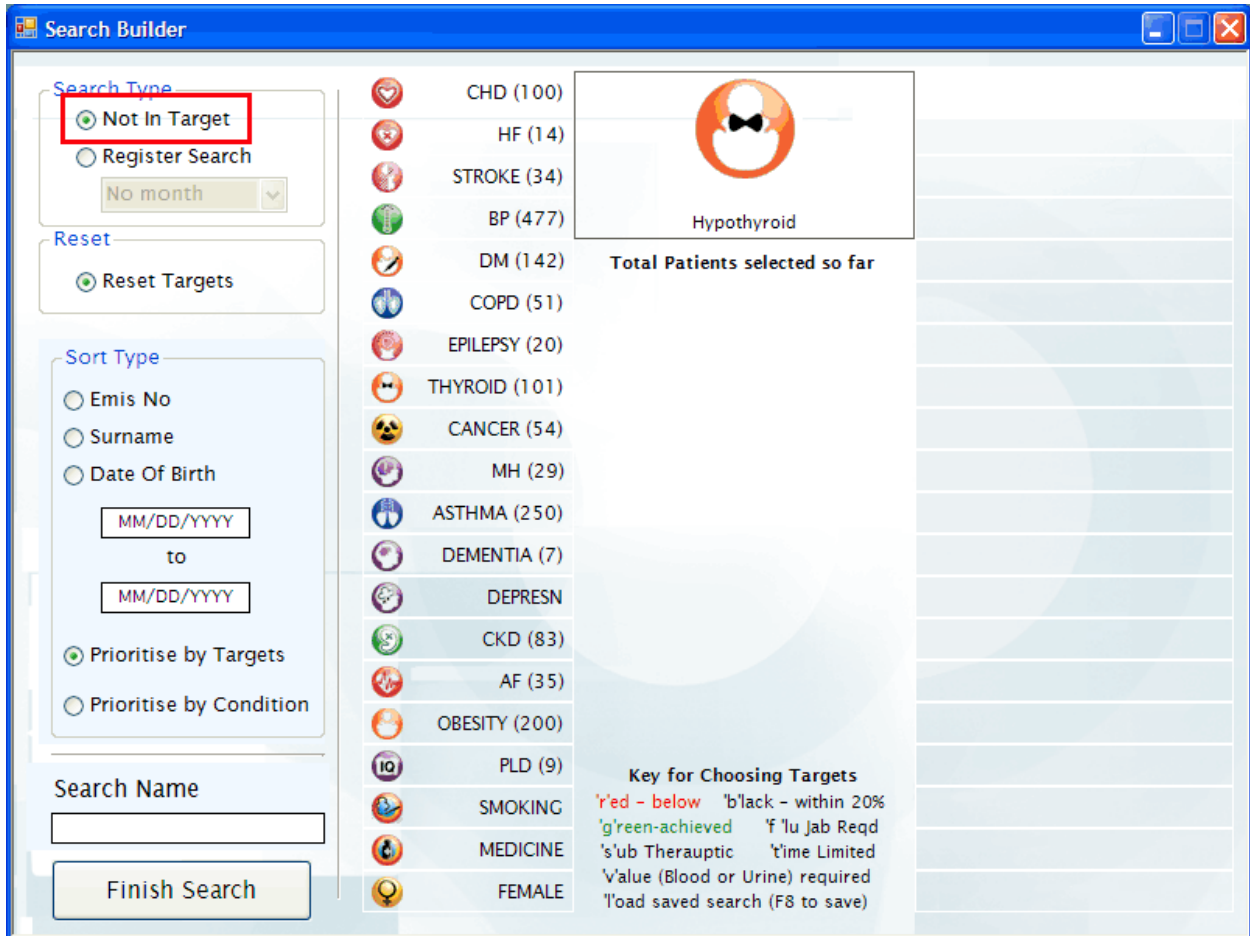
Check your own copy of EMIS Population Manager to see what yours is set to.

**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

**Search Builder**

**Search Type**

- Not In Target
- Register Search

No month

**Reset**

- Reset Targets

**Sort Type**

- Emis No
- Surname
- Date Of Birth

MM/DD/YYYY to MM/DD/YYYY

- Prioritise by Targets
- Prioritise by Condition

Search Name

Finish Search

<input checked="" type="checkbox"/>	CHD (100)
<input type="checkbox"/>	HF (14)
<input checked="" type="checkbox"/>	STROKE (34)
<input type="checkbox"/>	BP (477)
<input type="checkbox"/>	DM (142)
<input checked="" type="checkbox"/>	COPD (51)
<input type="checkbox"/>	EPILEPSY (20)
<input type="checkbox"/>	THYROID (101)
<input type="checkbox"/>	CANCER (54)
<input type="checkbox"/>	MH (29)
<input checked="" type="checkbox"/>	ASTHMA (250)
<input type="checkbox"/>	DEMENTIA (7)
<input type="checkbox"/>	DEPRESN
<input type="checkbox"/>	CKD (83)
<input type="checkbox"/>	AF (35)
<input type="checkbox"/>	OBESITY (200)
<input type="checkbox"/>	PLD (9)
<input type="checkbox"/>	SMOKING
<input type="checkbox"/>	MEDICINE
<input type="checkbox"/>	FEMALE

**Asthma**

ASTHMA3 - 14>19 + NO smok hist (8)

ASTHMA6- NO Rev in last 15m (166)

ASTHMA8 - >1/4/6+NO rev tests (15)

**Total Patients selected so far**

**292**

**Key for Choosing Targets**

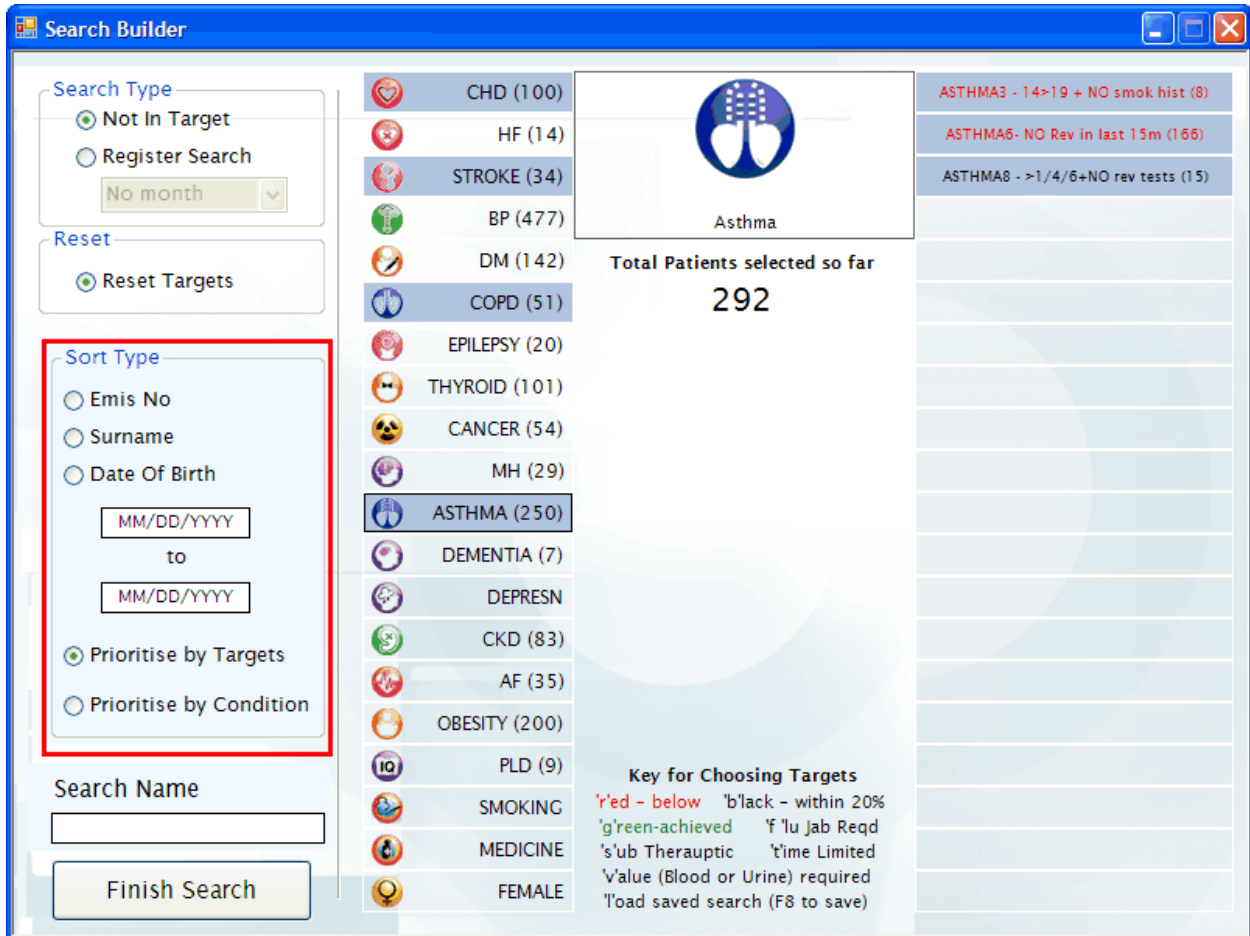
- \*red - below
- \*black - within 20%
- \*green-achieved
- \*lu Jab Reqd
- \*sub Therapeutic
- \*time Limited
- \*value (Blood or Urine) required
- \*load saved search (F8 to save)

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

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.

The display order will be the order your letters come out in the mail merge.

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 invited in first.

Step 6 – Name your search and click Finish

**Search Builder**

**Search Type**

- Not In Target
- Register Search

No month

**Reset**

- Reset Targets

**Sort Type**

- Emis No
- Surname
- Date Of Birth

MM/DD/YYYY to MM/DD/YYYY

- Prioritise by Targets
- Prioritise by Condition

**Search Name**

CHD Stroke COPD Asthma recal

**Finish Search**

**Conditions List:**

- 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

**Asthma**

Total Patients selected so far: 292

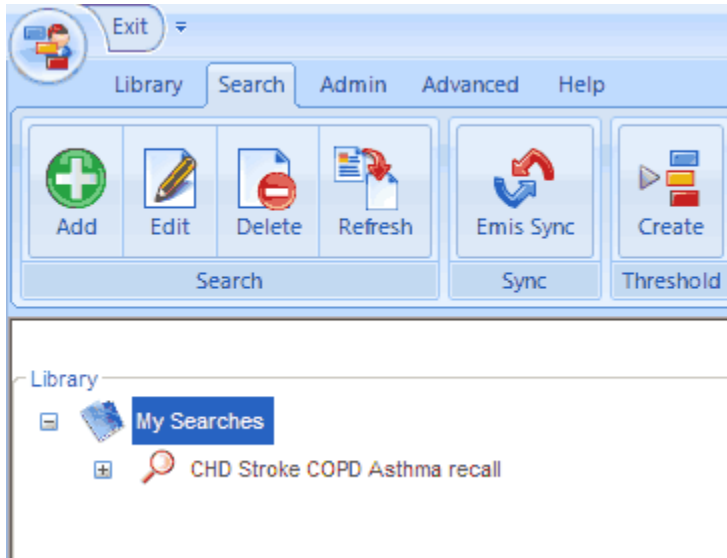
**Key for Choosing Targets**

- '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)

**Filters:**

- ASTHMA3 - 14>19 + NO smok hist (8)
- ASTHMA6- NO Rev in last 15m (166)
- ASTHMA8 - >1/4/6+NO rev tests (15)

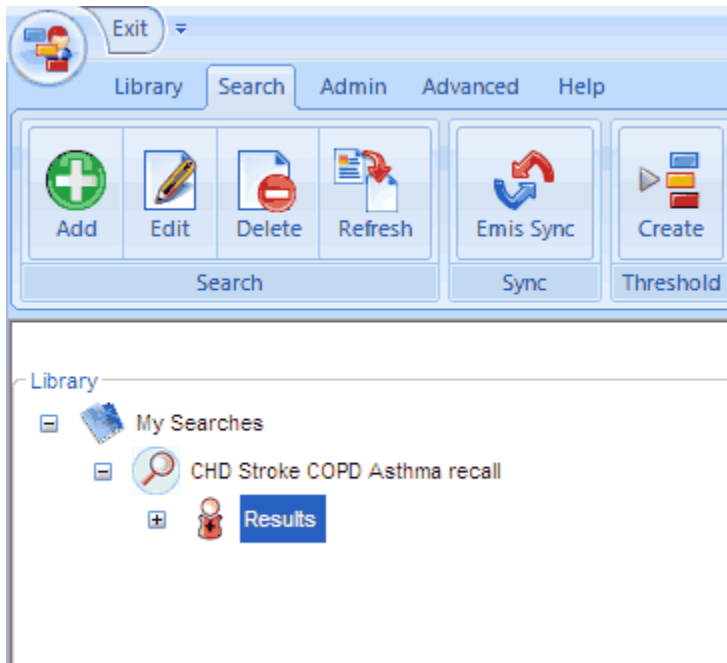
Step 7 – Loading your results



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

Total Patients  
 in Search  
**292**



**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.

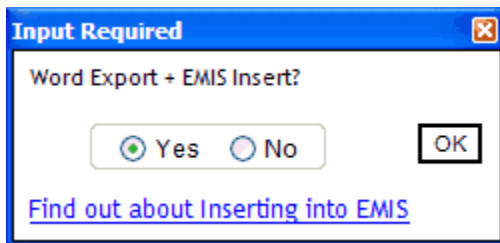
Step 9 – Exporting to Word and Inserting to EMIS

The screenshot shows the PatientChase software interface. At the top, there is a menu bar with 'Exit', 'Library', 'Search', 'Admin', 'Advanced', and 'Help'. Below the menu bar is a toolbar with icons for 'Add', 'Edit', 'Delete', 'Refresh', 'Emis Sync', and 'Create'. The main area is divided into two panes. The left pane shows a search tree with 'My Searches' and a selected search 'CHD Stroke COPD Asthma recall'. A context menu is open over the 'Results' folder, listing options such as 'Delete Search', 'Export Search Results To Excel', and 'Export to Word AND Insert into EMIS'. The right pane displays a table of search results with columns for 'DateIns', 'Conditions', 'CHD', 'STROKE', 'COPD', 'ASTHMA', 'SurName', 'FirstNames', and 'EmisN Title'. Below the table, there are two summary boxes: one for the search date (07/12/2011) and total patients (292), and another for a specific patient, Mr. Laura Channon, listing her medical conditions.

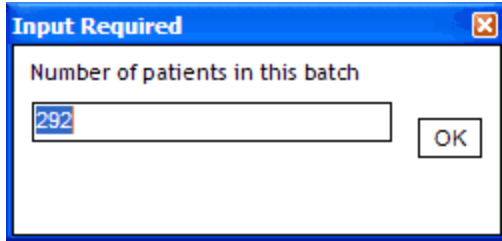
DateIns	Conditions	CHD	STROKE	COPD	ASTHMA	SurName	FirstNames	EmisN Title
1	STROKE,COPD,ASTHM		STROKE	COPD	ASTHMA	Channon	Laura	24181 Mr
2	CHD,ASTHMA	CHD			ASTHMA	Beech	Ilona	25964 Mrs
3	CHD,COPD,ASTHMA	CHD		COPD	ASTHMA	Munns	Pierre	25249 Mr
4	CHD,COPD	CHD		COPD		Crilly	Bridget	21766 Mrs
5	CHD,STROKE	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	23757 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	Brialte	20882 Mr

Right click over the word 'Results' and select 'Export to Word AND Insert into EMIS'.

This process will create a mail merge (into Microsoft Word) of patient letters ready to print AND at the same time put a copy of each letter into the relevant patient medical records.



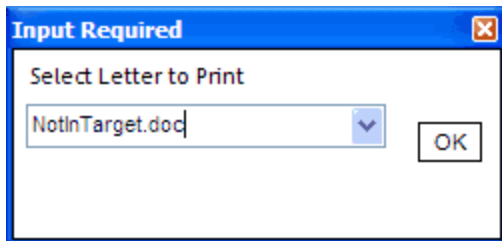
Click 'OK' to continue.



Decide how many patients you wish to invite at this time and type in the number.

(PatientChase will remember that it's sent out a first letter for that number of patients and whenever you decide to do a new batch, it will show how many patients are remaining).

Click OK.



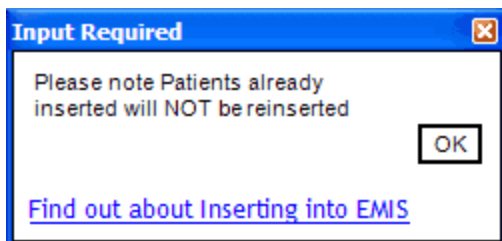
Now select the letter template you modified/created when setting PatientChase up. (See the 'How do I create my own letter template?' chapter).

Click OK.

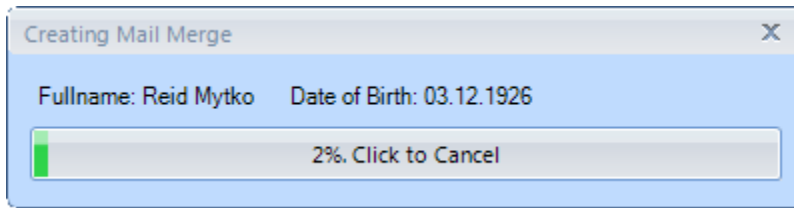


Select the date of insertion into EMIS using the calendar. The default is today's date.

Click OK.

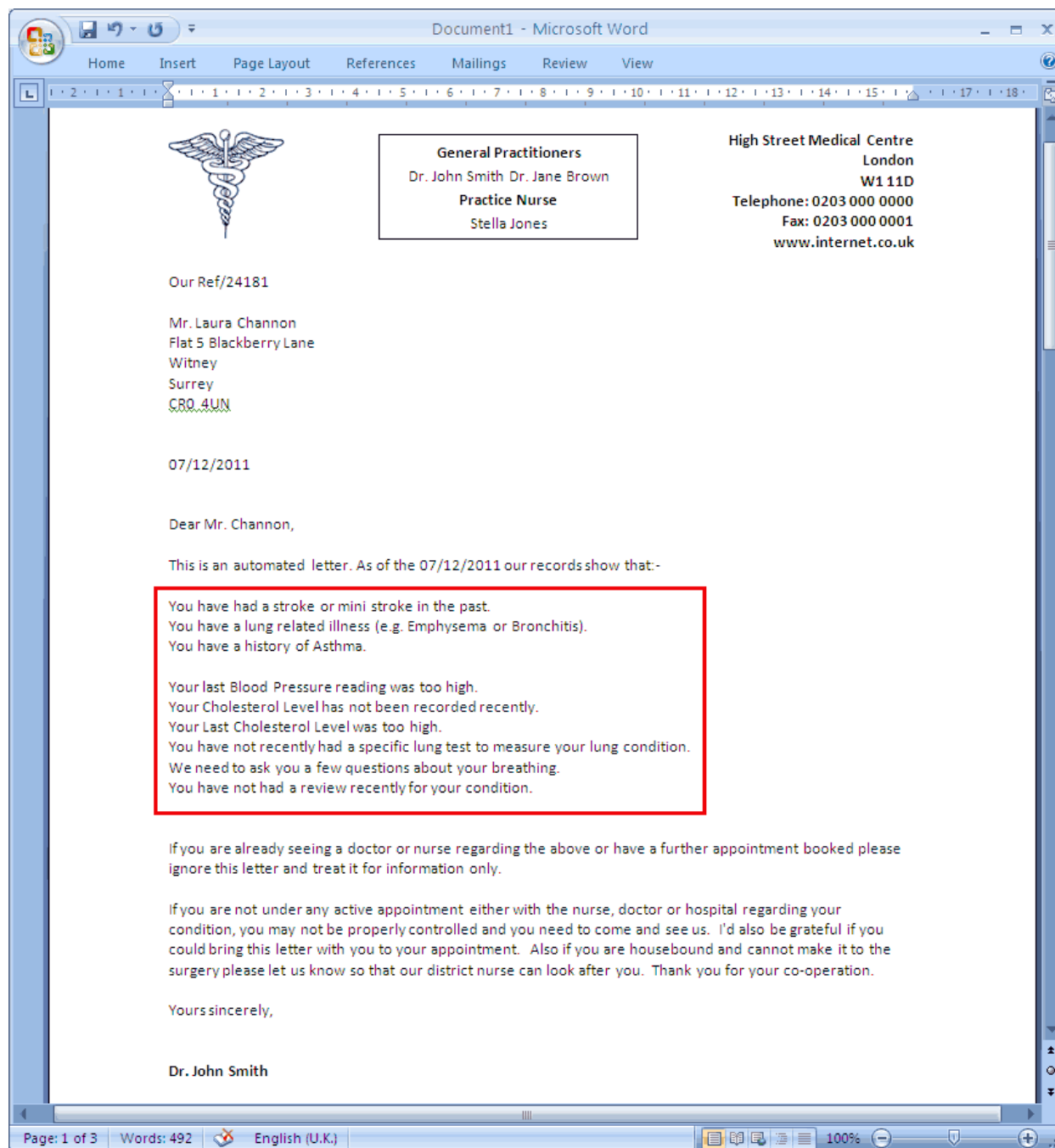


Click OK.



PatientChase will now create the mail merge for you and at the same time insert copies of the letters into the patients' medical records.

## Step 10 – The completed mail merge.



Above is a sample letter once the mail merge is complete and Word has opened.

Each letter is completely personalised to each patient and only the conditions and targets relevant to that particular patient appear on the letter.

An identical copy of the letter is stored as an attachment in the patient's notes.

Remember, the 'look and feel' and level of content is entirely down to you.

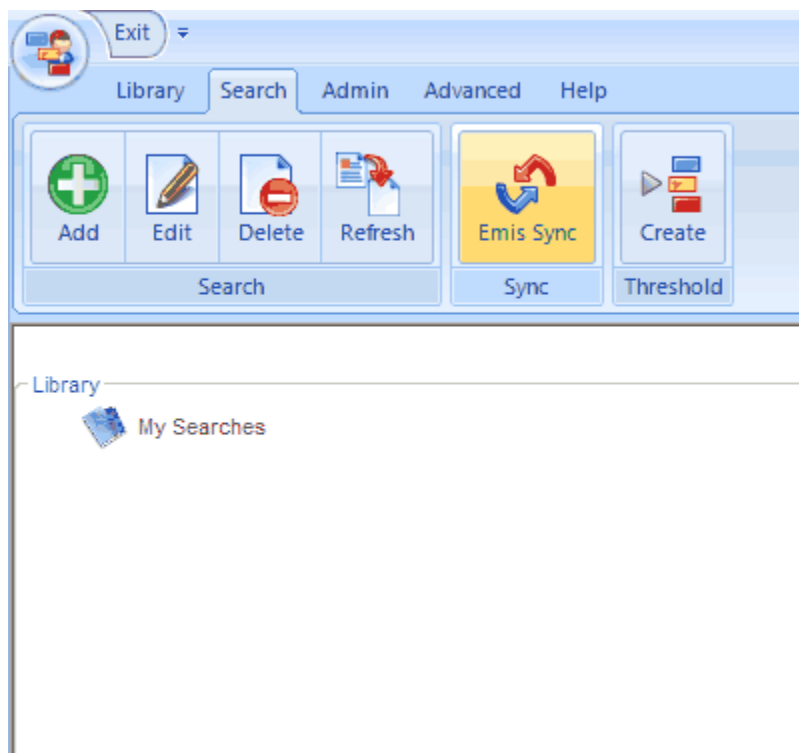
(See the 'How do I create my own letter template?' chapter to customise your own templates).

## **Mail Merging – Creating month of birth recall letters**

In this section you will be shown how to:

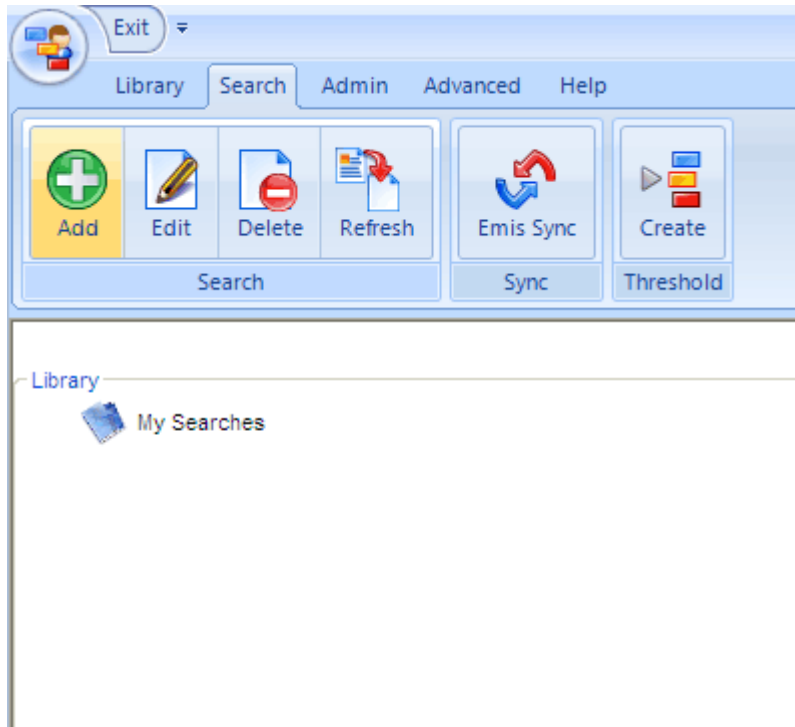
- Create patient invite letters based on their month of birth.

Step 1 – Sync with EMIS



Syncing with EMIS will pull into PatientChase details of patients who are on your chronic disease registers.

Step 2 – Add a new search



Step 3 – Select 'Register' search

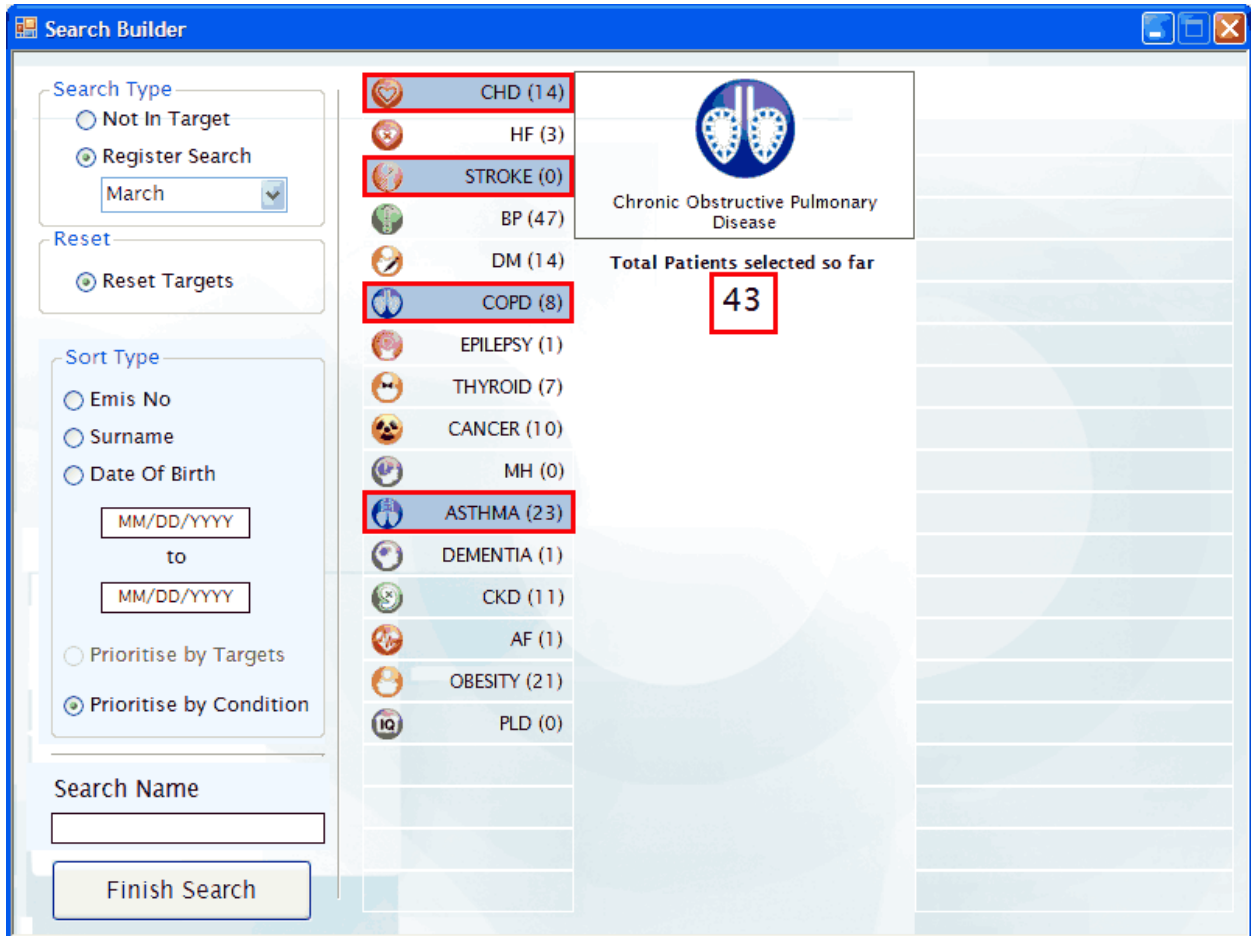


From the drop down, choose the month of birth.

Notice that once you've selected the month, the numbers alongside each register name change. These figures represent how many are people are on that register and born in that particular month.

In the example above, 14 patients born in March have CHD.

Step 4 – Select your register/s

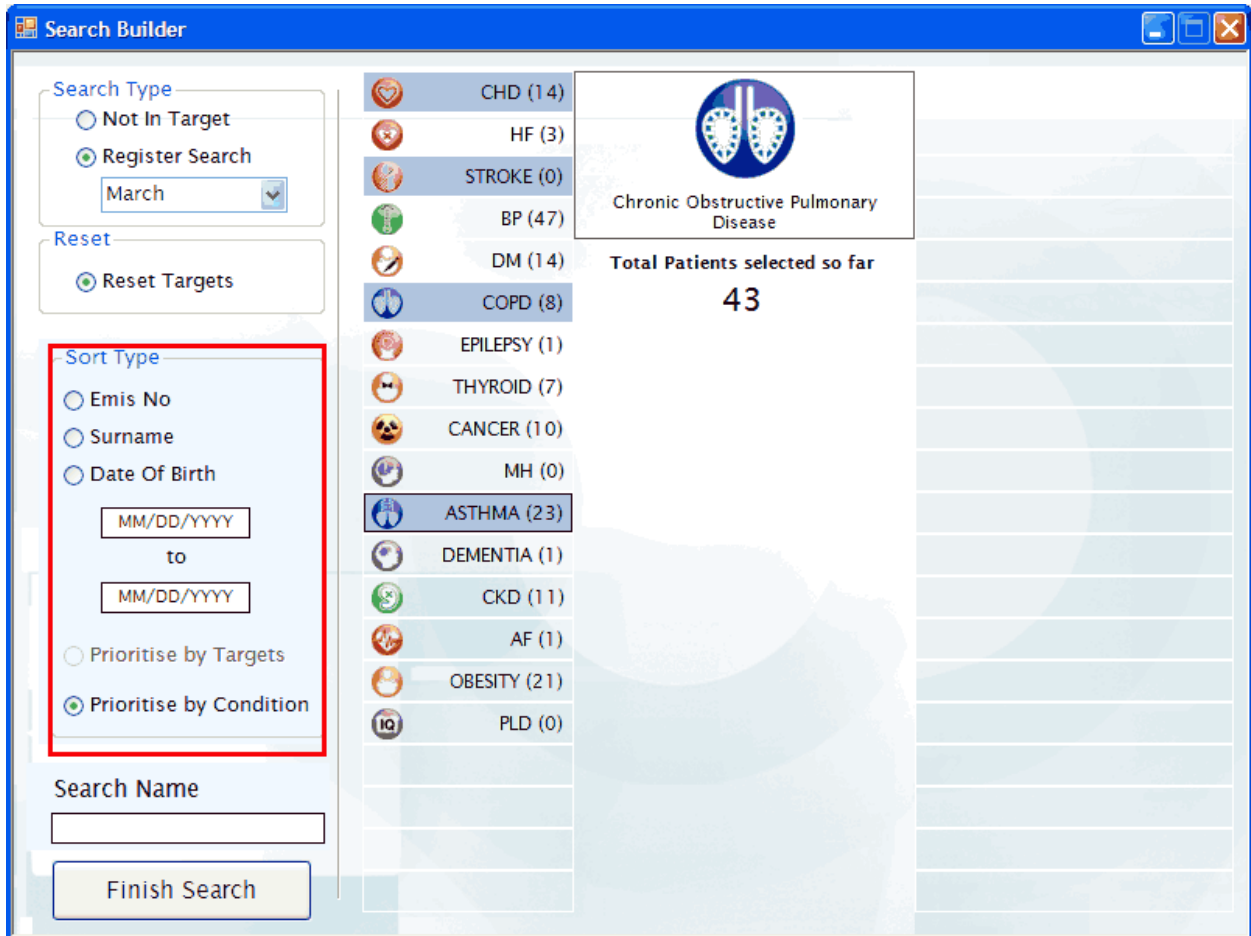


In this example, CHD, Stroke, COPD and Asthma patients who were born in March were selected to form the group of patients to be recalled.

PatientChase found there are 43 patients within this group.

Some of these patients will be on 2, 3 or even 4 of the registers 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.

The display order will be the order your letters come out in the mail merge.

By default, 'prioritise by condition' is selected as this is the most popular among surgeries.

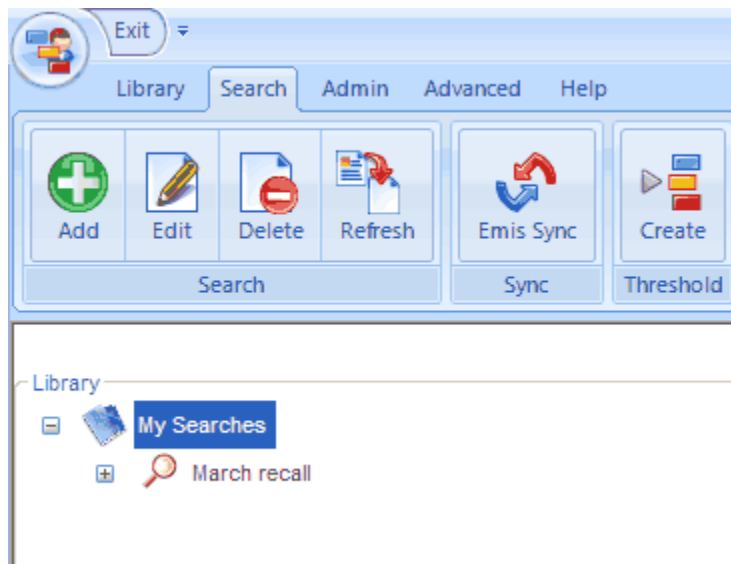
What this means is that the patients who feature on the most number of registers will be displayed at the top of your results and therefore invited in first.

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. A dropdown menu shows 'March'.
- Reset:**  Reset Targets.
- Sort Type:**  Emis No,  Surname,  Date Of Birth. Date format fields are set to MM/DD/YYYY.
- Prioritise by:**  Prioritise by Targets,  Prioritise by Condition.
- Search Name:** A text box containing 'March recall' and a 'Finish Search' button.
- Condition List:**
  - CHD (14)
  - HF (3)
  - STROKE (0)
  - BP (47)
  - DM (14)
  - COPD (8)
  - EPILEPSY (1)
  - THYROID (7)
  - CANCER (10)
  - MH (0)
  - ASTHMA (23)
  - DEMENTIA (1)
  - CKD (11)
  - AF (1)
  - OBSESITY (21)
  - PLD (0)
- Heart Disease Summary:** A red heart icon with 'Heart Disease' text below it.
- Total Patients selected so far:** 43.
- Current % / Current Points:** A table with two columns and one row.
- Threshold %:** An empty input field.
- Patients req'd to reach Threshold:** A section header for a table.

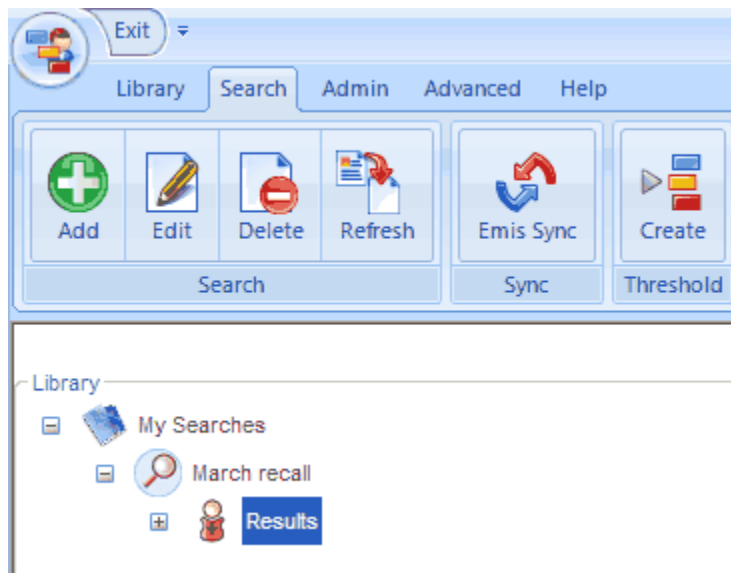
Step 7 – Loading your results



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

	Dateln	Conditions	CHD	STROK	COPD	ASTHMA	SurName	FirstName	EmisN	Title	S	DateOfBirth	NHSN
1		CHD,COPD	CHD		COPD		Thoday	Lubomira	19003	Mrs	F	24/03/1966	567856
2		COPD,ASTHMA			COPD	ASTHMA	Winter	Kerensa	6954	Mrs	F	24/03/1928	575994
3		ASTHMA				ASTHMA	Edgell	Benoit	19342	Mrs	F	29/03/1922	803659
4		ASTHMA				ASTHMA	Rafferty	Paola	25203	Mr	M	04/03/1938	504622
5		ASTHMA				ASTHMA	Sowter	Vicki	22712	Mrs	F	20/03/1957	487282
6		CHD	CHD				Bennett	Annelize	24845	Mrs	F	18/03/1922	302008
7		CHD	CHD				Taylor	Nicola	23748	Mrs	F	09/03/1953	237638
8		CHD	CHD				Fox-Bregman	Kaye	22736	Mrs	F	16/03/1961	457227
9		CHD	CHD				Thornton-Allen	Leza	21637	Mrs	F	12/03/1949	781913
10		CHD	CHD				Irons	Antoinette	19350	Mr	M	07/03/1953	522594
11		COPD			COPD		Eskander	Shauna	2504	Mrs	F	24/03/1964	709374
12		ASTHMA				ASTHMA	Wabali	Johanette	7829	Mrs	F	13/03/1927	489318
13		CHD	CHD				Hullah	Jaimee	2120	Mr	M	27/03/1982	248136
14		CHD	CHD				Richings	Abraham	6588	Mr	M	07/03/1934	795619
15		ASTHMA				ASTHMA	Woogara	Cecile	25930	Mrs	F	15/03/1956	683566
16		ASTHMA				ASTHMA	Lacey	Morag	25278	Mr	M	23/03/1923	649037
17		ASTHMA				ASTHMA	Thornton-Allen	Leza	24337	Mrs	F	12/03/1949	781913
18		CHD	CHD				Nicholas	Melinda	24456	Mrs	F	20/03/1966	321428
19		COPD			COPD		Kwan	Mercedes	21542	Mrs	F	10/03/1960	598868
20		CHD	CHD				Glynn	Gwenda	12338	Mrs	F	04/03/1951	567427
21		ASTHMA				ASTHMA	Nicklin	Stanislav	8264	Mr	M	27/03/1986	712827



**Date of Search: 07/12/2011**  
 Search :Register  
 :Sorted by Condition  
:Born in March  
 Emis No :19003  
 Patient Name:Mrs Lubomira Thoday  
 Address :Flat 13 Cabbage Parkway  
 Rhosneigr Surrey CR4 4JQ  
 TelNo :07796302002

Total Patients in Search  
**43**



**Mrs Lubomira Thoday**  
CHD1 - Patients on CHD Register  
 COPD14 - Patients on COPD Register

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 that the patient is on two of the four registers searched – CHD and COPD.

Notice also the date of birth column confirms all the patients were born in March.

Clicking on any other patient will display their relevant registers.

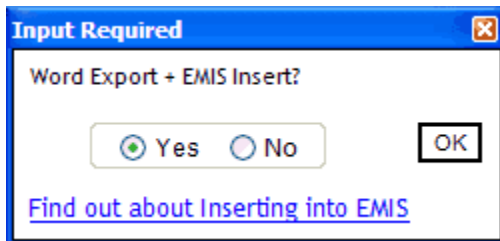
Step 9 – Exporting to Word and Inserting to EMIS

The screenshot shows the PatientChase software interface. At the top, there is a menu bar with 'Exit', 'Library', 'Search', 'Admin', 'Advanced', and 'Help'. Below the menu bar is a toolbar with icons for 'Add', 'Edit', 'Delete', 'Refresh', 'Emis Sync', and 'Create'. The main area is divided into two sections. On the left, there is a 'Library' pane with 'My Searches' and a search for 'March recall'. A context menu is open over the search results, with the option 'Export to Word AND Insert into EMIS' highlighted. On the right, there is a table of search results with columns for 'DateIns', 'Conditions', 'CHD', 'STROK', 'COPD', 'ASTHMA', 'SurName', 'FirstName', and 'EmisN'. Below the table, there is a summary card for 'Mrs Lubo' showing search details and patient information.

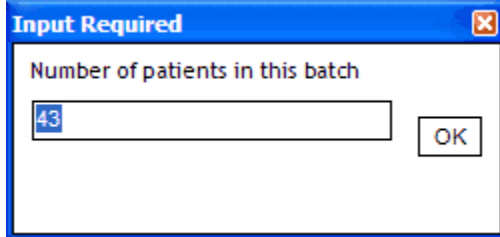
DateIns	Conditions	CHD	STROK	COPD	ASTHMA	SurName	FirstName	EmisN
1	CHD,COPD	CHD		COPD		Thoday	Lubomira	19003
2	COPD,ASTHMA			COPD	ASTHMA	Winter	Kerensa	6954
3	ASTHMA				ASTHMA	Edgell	Benoit	19342
4	ASTHMA				ASTHMA	Rafferty	Paola	25203
5	ASTHMA				ASTHMA	Sowter	Vicki	22712
6	CHD	CHD				Bennett	Annelize	24845
7	CHD	CHD				Taylor	Nicola	23748
8	CHD	CHD				Fox-Bregman	Kaye	22736
9	CHD	CHD				Thornton-Allen	Leza	21637
10	CHD	CHD				Irons	Antoinette	19350
11	COPD			COPD		Eskander	Shauna	2504
12	ASTHMA				ASTHMA	Wabali	Johanette	7829
13	CHD	CHD				Hullah	Jaimee	2120
14	CHD	CHD				Richings	Abraham	6588
15	ASTHMA				ASTHMA	Woogara	Cecile	25930
16	ASTHMA				ASTHMA	Lacey	Morag	25278
17	ASTHMA				ASTHMA	Thornton-Allen	Leza	24337
18	CHD	CHD				Nicholas	Melinda	24466
19	COPD			COPD		Kwan	Mercedes	21542
20	CHD	CHD				Glynn	Gwenda	12338
21	ASTHMA				ASTHMA	Nicklin	Stanislav	8264

Right click over the word 'Results' and select 'Export to Word AND Insert into EMIS'.

This process will create a mail merge (into Microsoft Word) of patient letters ready to print AND at the same time put a copy of each letter into the relevant patient medical records.



Click 'OK' to continue.

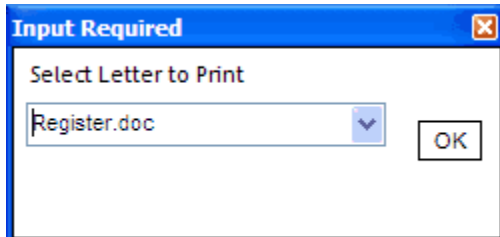


An 'Input Required' dialog box with a blue title bar and a close button. The text 'Number of patients in this batch' is displayed above a text input field containing the number '43'. To the right of the input field is an 'OK' button.

Decide how many patients you wish to invite at this time and type in the number.

(PatientChase will remember that it's sent out a first letter for that number of patients and whenever you decide to do a new batch, it will show how many patients are remaining).

Click OK.



An 'Input Required' dialog box with a blue title bar and a close button. The text 'Select Letter to Print' is displayed above a dropdown menu showing 'Register.doc'. To the right of the dropdown menu is an 'OK' button.

Now select the letter template you modified/created when setting PatientChase up. (See the 'How do I create my own letter template?' chapter).

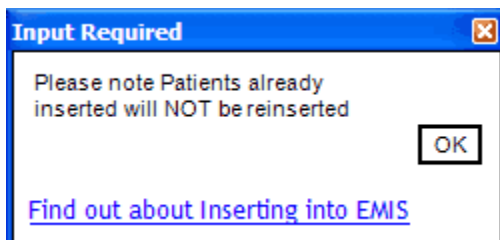
Click OK.



An 'Input Required' dialog box with a blue title bar and a close button. The text 'Choose Date of Insert' is displayed above a date dropdown menu showing '07 December 2011'. To the right of the dropdown menu is an 'OK' button. At the bottom of the dialog is a blue hyperlink: [Find out about Inserting into EMIS](#).

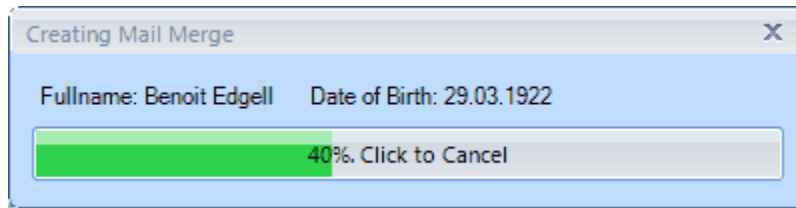
Select the date of insertion into EMIS using the calendar. The default is today's date.

Click OK.



An 'Input Required' dialog box with a blue title bar and a close button. The text 'Please note Patients already inserted will NOT be reinserted' is displayed. To the right of the text is an 'OK' button. At the bottom of the dialog is a blue hyperlink: [Find out about Inserting into EMIS](#).

Click OK.



PatientChase will now create the mail merge for you and at the same time insert copies of the letters into the patients' medical records.

## Step 10 – The completed mail merge.



Above is a sample letter once the mail merge is complete and Word has opened.

Each letter is completely personalised to each patient and only the conditions relevant to that particular patient appear on the letter.

An identical copy of the letter is stored as an attachment in the patient's notes.

Remember, the 'look and feel', wording and level of content is entirely down to you.

(See the 'How do I create my own letter template?' chapter to customise your own templates).

## Creating searches to export to Excel

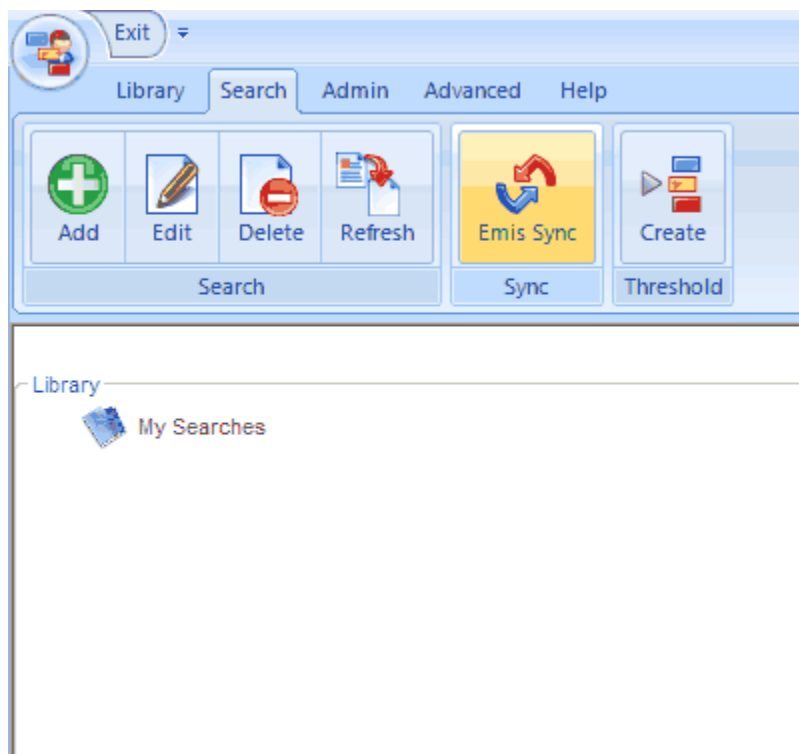
In this section you will be shown how to:

- 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.

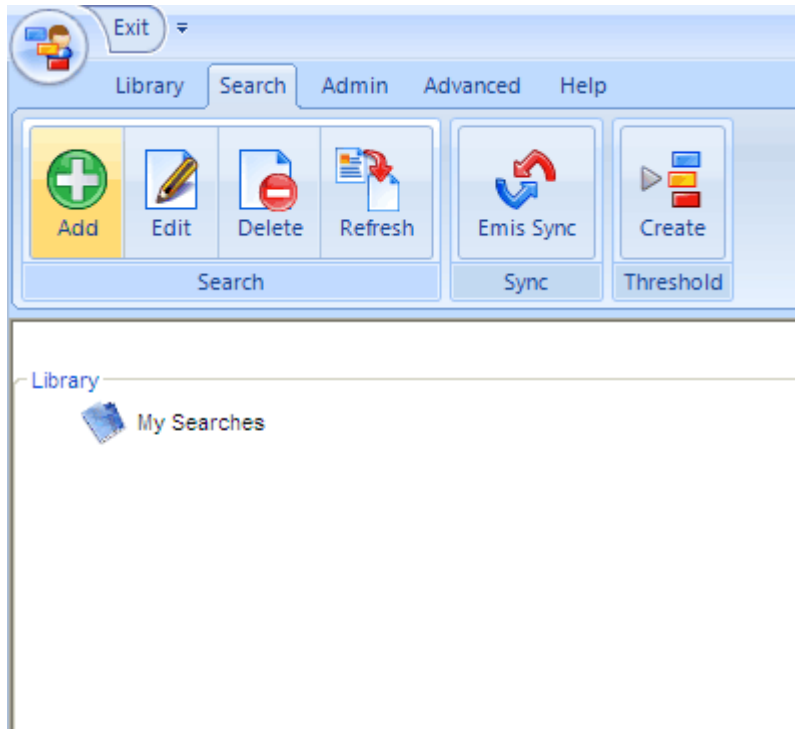
PatientChase uses the same data as EMIS Population Manager's **LOOK AHEAD** view.

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

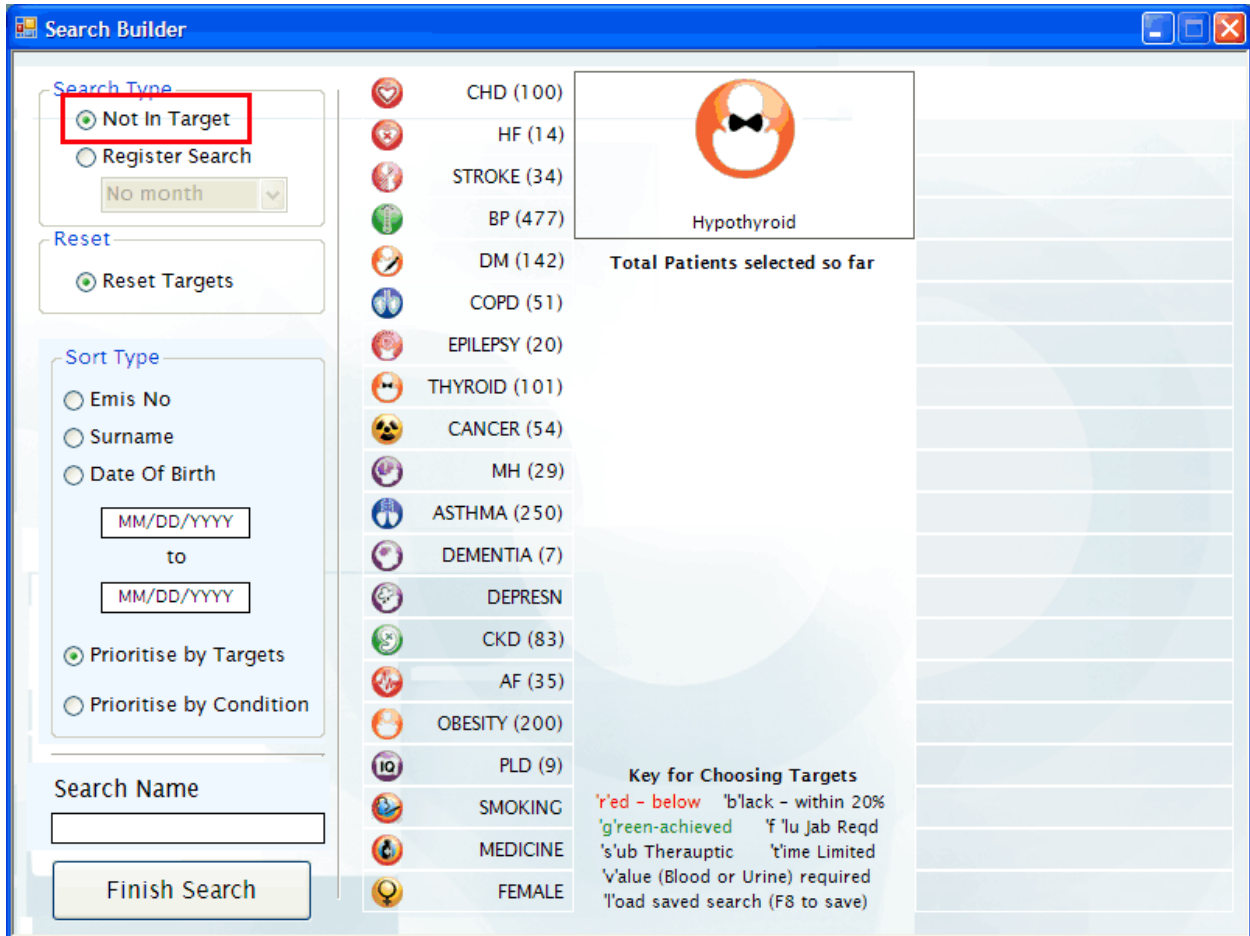
Check your own copy of EMIS Population Manager to see what yours is set to.

**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

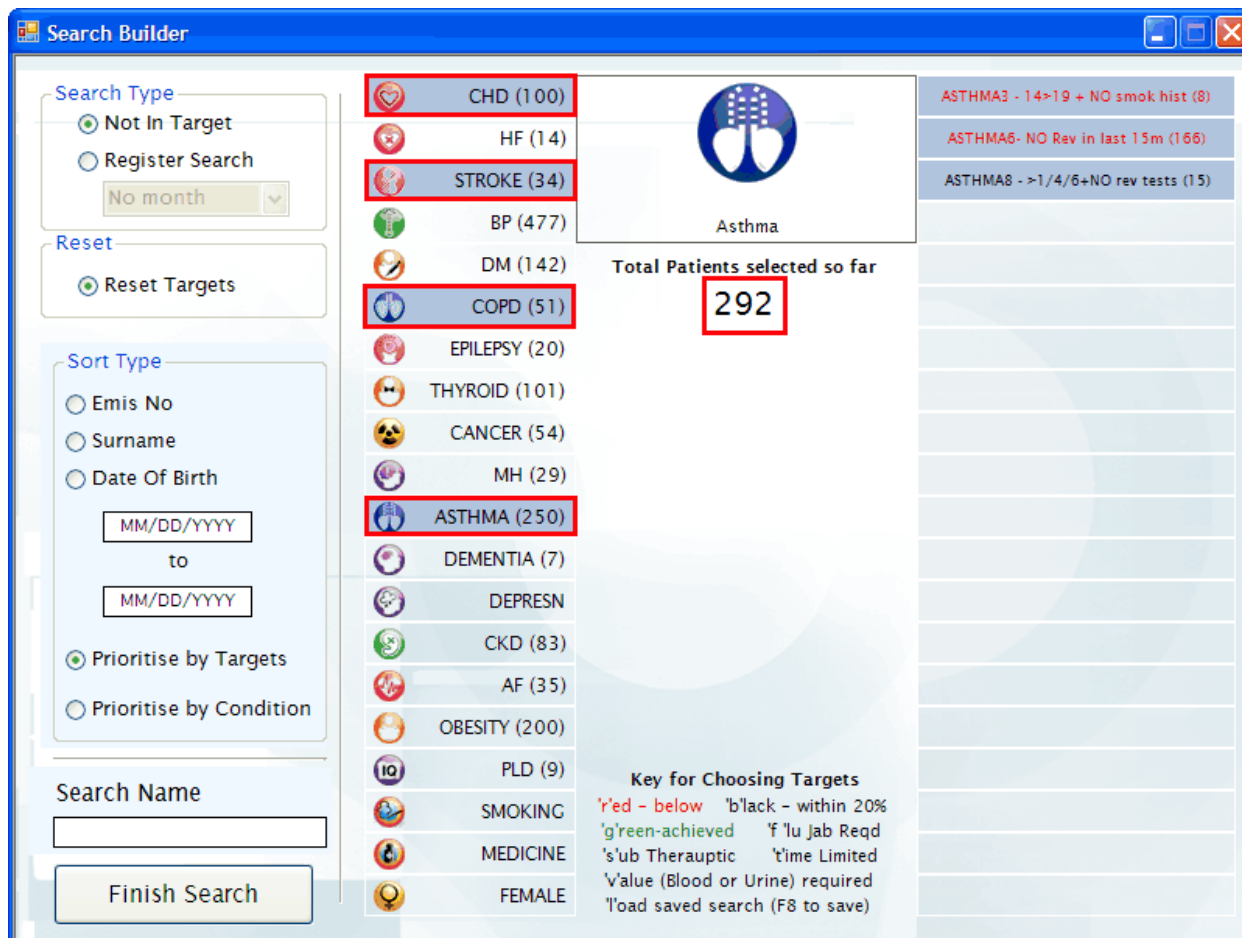


Step 3 – ‘Select Not in Target’ search



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

Step 4 – Select your targets

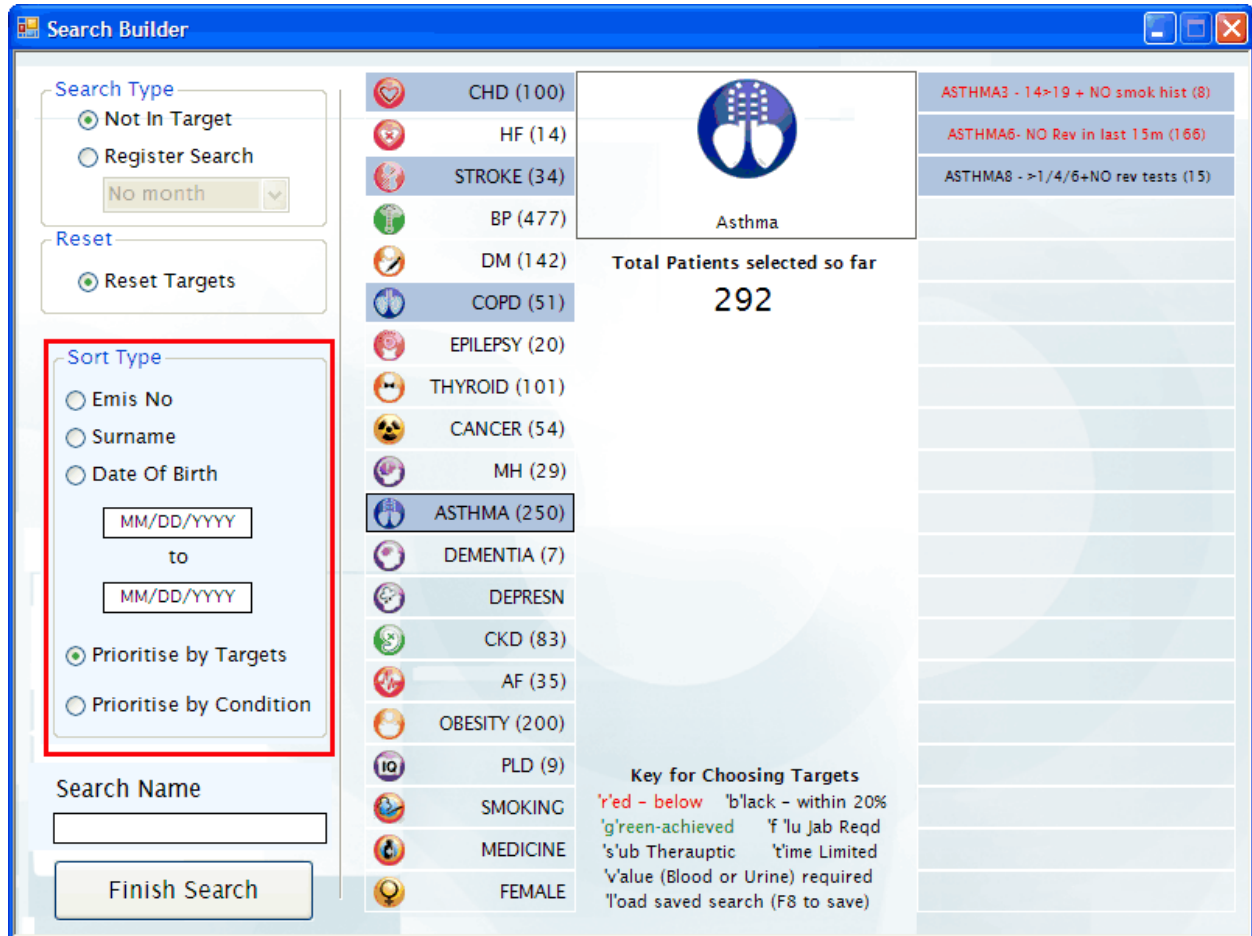


In this example, CHD, Stroke, COPD and Asthma patients were selected to form the group of patients to be identified.

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.

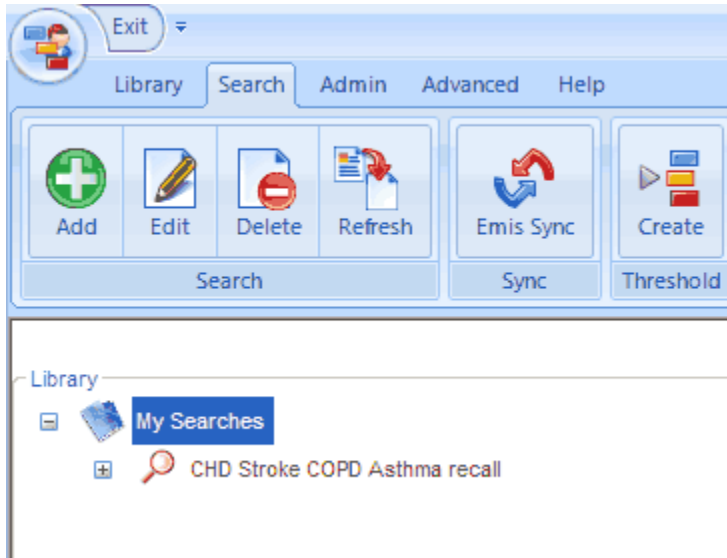
What this means is that the 'most complex' patients will be displayed at the top of your results and therefore appear first when you export to Excel.

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
  - Dropdown menu: No month
- Reset:**
  - Reset Targets
- Sort Type:**
  - Emis No
  - Surname
  - Date Of Birth
  - MM/DD/YYYY to MM/DD/YYYY
  - Prioritise by Targets
  - Prioritise by Condition
- Search Name:**
  - Text input field: CHD Stroke COPD Asthma recal
  - Finish Search button
- Condition List:**
  - 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 Selection:**
  - ASTHMA3 - 14>19 + NO smok hist (8)
  - ASTHMA6- NO Rev in last 15m (166)
  - ASTHMA8 - >1/4/6+NO rev tests (15)
- Summary:**
  - Icon: Asthma
  - Total Patients selected so far: 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)

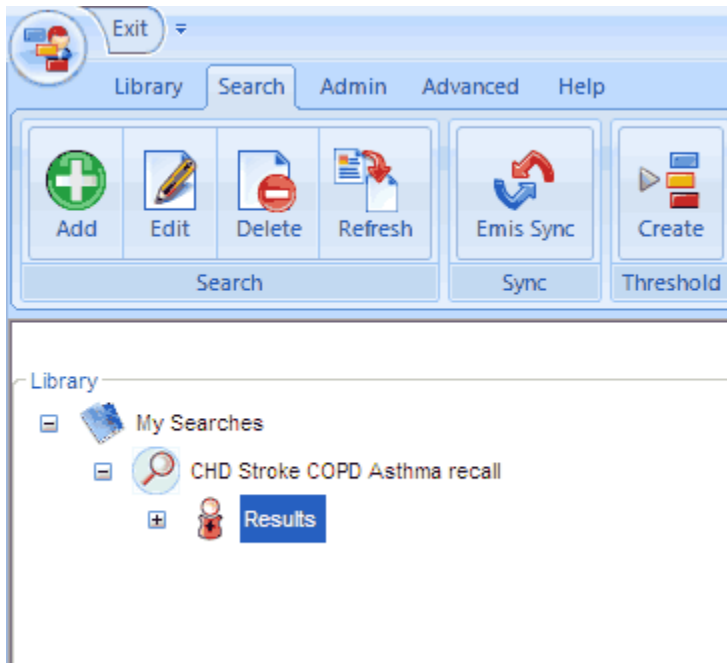
### Step 7 – Loading your results



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

<p>Total Patients in Search <b>292</b></p>	<p><b>Date of Search: 07/12/2011</b> Search :Not in Target :Sorted by Target</p> <p>Emis No :24181 Patient Name:Mr Laura Channon Address :Flat 5 Blackberry Lane Witney Surrey CR0 4UN TelNo :84012267</p>	<p><b>Mr Laura Channon</b></p> <div style="border: 2px solid red; padding: 5px;"> <p>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</p> </div>
--	--	---

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 right main panel. 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, listing options like 'Delete Search', 'Refresh Search', 'Edit Search', 'Duplicate Search', 'Export Search Results To Excel' (highlighted), 'Export Results to Word ONLY', 'Insert Results to EMIS ONLY', 'Export to Word AND Insert into EMIS', 'Set BookMark Value', 'Display Popup for this Search', and 'Filter Search via Diary Dates'. The main panel displays a table of search results with columns: Date/Ins, Conditions, CHD, STROKE, COPD, ASTHMA, SurName, FirstNames, and EmisN. The table lists 21 patients, with the first row being Mrs Ilona Beech. Below the table, there are two summary boxes. The left box shows 'Date of Search: 07/12/2011', 'Search: :Not in Target', ':Sorted by Target', 'Emis No :25964', 'Patient Name:Mrs Ilona Beech', 'Address :Flat 32 Yam Crescent Chepstow Surrey SM6 0AB', and 'TelNo :0208 647 7948'. The right box shows 'Mrs Ilona Beech' and lists conditions: 'CHD6 - BP 150/90 or less', 'CHD9 - Taking Aspirin or equiv', 'CHD10 - On Betablockers', 'ASTHMA6 - Rev in last 15m', and 'ASTHMA8 - >1/4/06+rev testi'.

Date/Ins	Conditions	CHD	STROKE	COPD	ASTHMA	SurName	FirstNames	EmisN	TiB
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	23757	Mrs
11	STROKE		STROKE			Herring	Wesley	6017	Mr
12	COPD,ASTHMA			COPD	ASTHMA	Jueress	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	Alexandro	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.

## Filtering or merging a search with other data

In this section you will be shown how to:

- Filter or merge a PatientChase search by another set of criteria.

Examples:

- Housebounds
- Nursing home patients
- Recently deceased patients
- 'No more letters' patients
- Usual or registered doctor
- Branch site patients
- QOF+ patients
- CKD patients with PVR

Any criteria can be chosen, provided it is Read coded in EMIS.

To complete this section you will need to build a PatientChase search and also produce an export from EMIS Search & Statistics. This export will then be merged with the PatientChase search.

Filtering or merging can be applied to any type of PatientChase search, whether it is a QOF search or a month of birth search.

**The example followed in this section will remove housebound patients from a list of patients with CHD, Stroke, COPD and Asthma QOF targets.**

Step 1 – Create your PatientChase Search.

If you are unsure how to do this, read one of the following sections:

- [Mail Merging – Creating QOF letters - steps 1-6](#)
- [Mail Merging – Creating month of birth recall letters - steps 1-6](#)
- [How do I create searches which I can export to Excel? - steps 1-6](#)

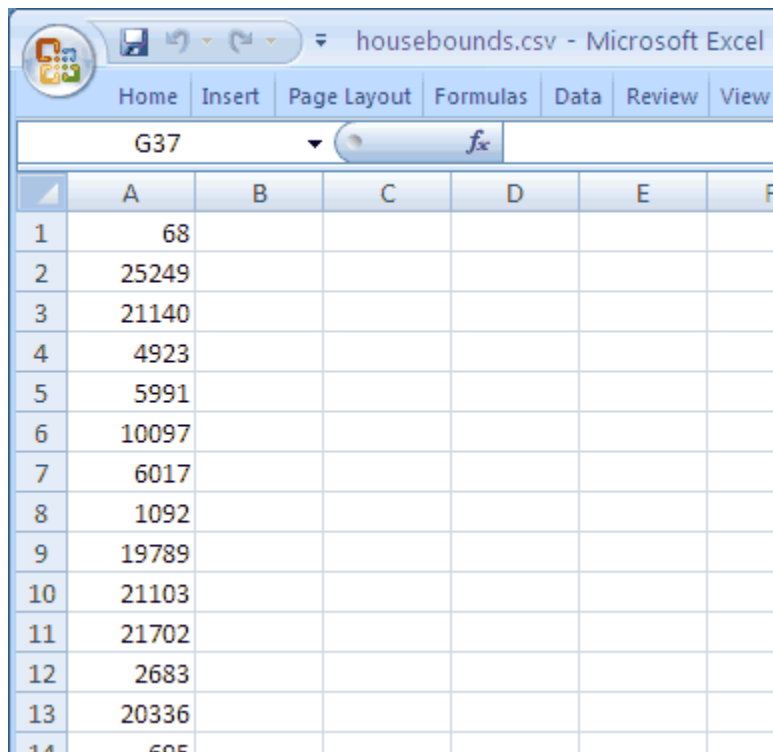
Filtering or merging a search with other data

Step 2 – Run a housebound search in EMIS.

The only field required in your search is Patient Number.

Export this list to Excel.

It should look something like this:



	A	B	C	D	E	F
1	68					
2	25249					
3	21140					
4	4923					
5	5991					
6	10097					
7	6017					
8	1092					
9	19789					
10	21103					
11	21702					
12	2683					
13	20336					
14	685					

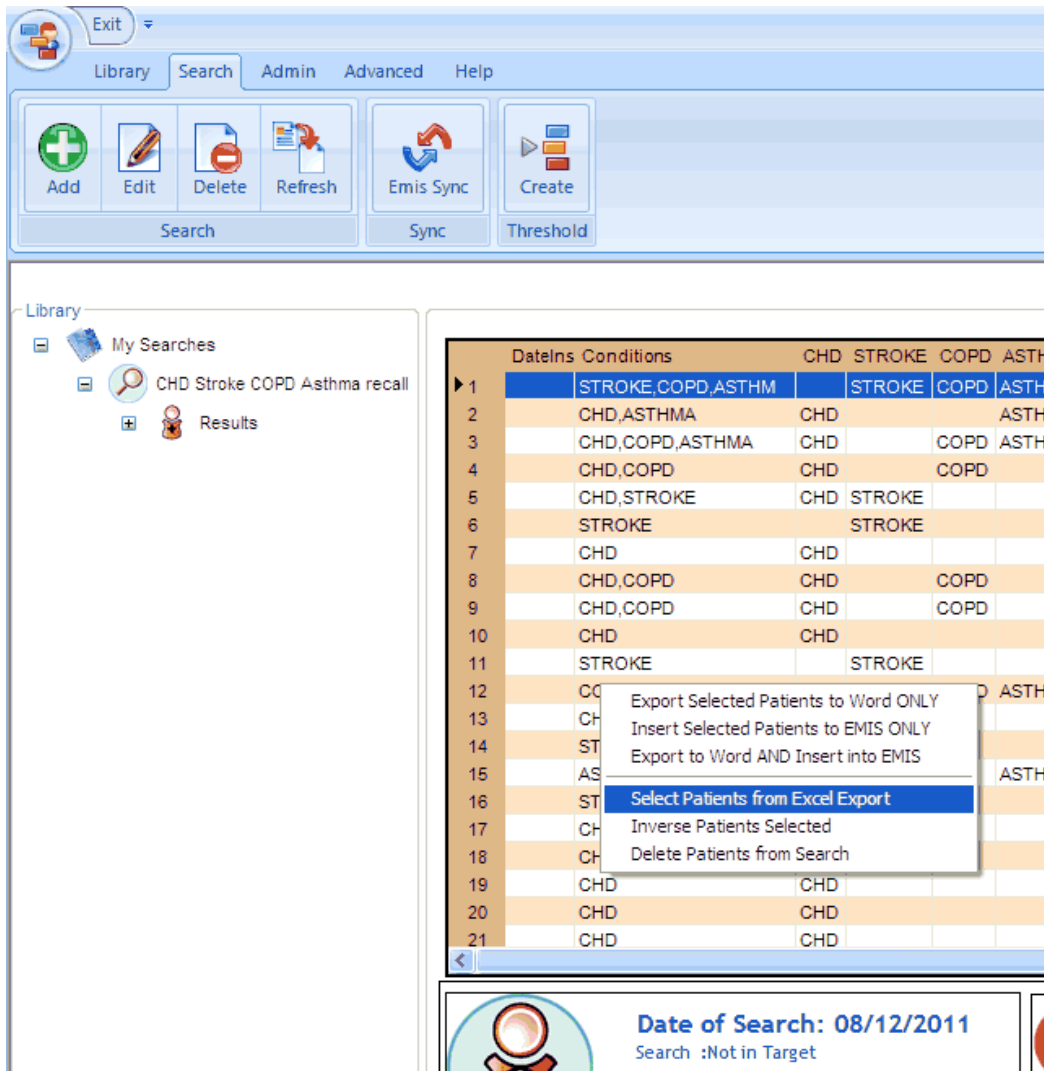
Make sure the first column is the Patient Number field.

Make sure the first cell (A1) is not blank nor contains a header.

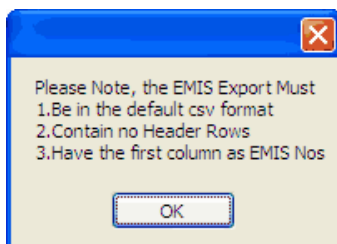
Save the file as a CSV file on your desktop.

Close Excel.

Step 3 – Open the results view of your PatientChase search and locate your EMIS export

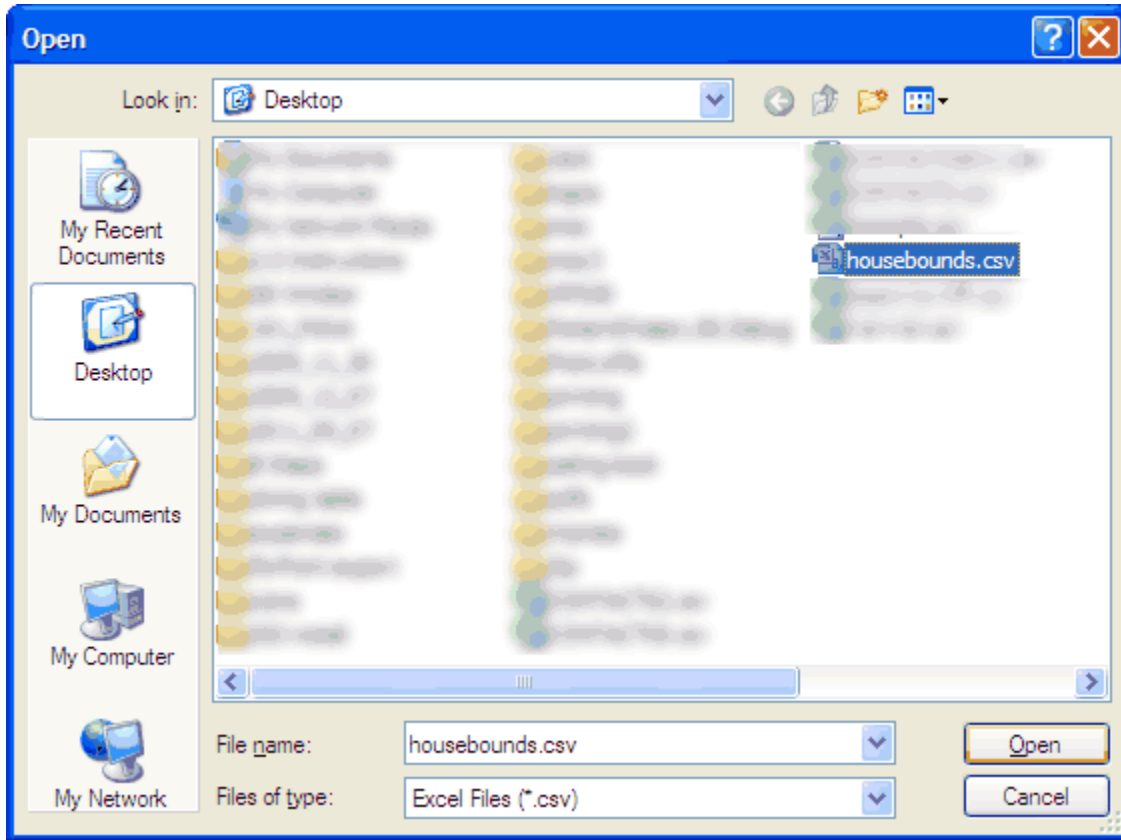


Right click anywhere in the right panel and click 'Select Patients from Excel Export'.

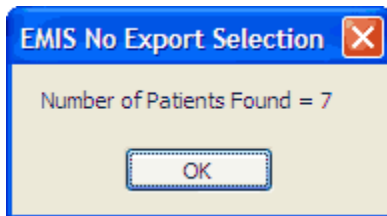


A box will appear reminding you of the required format of the file you created in Excel.

Step 4 – Select the EMIS Export (i.e. Excel file)



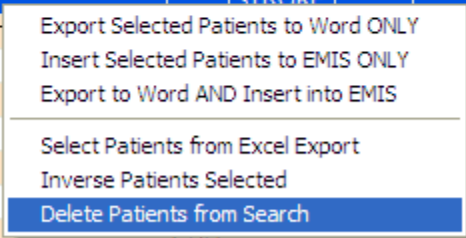
Click Open.



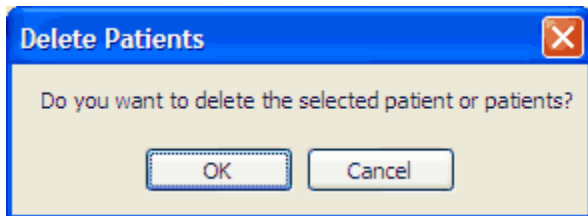
PatientChase will highlight in blue those patients matching your criteria.

Step 5 – Removing the housebound patients.

	Date	Ins	Conditions	CHD	STROKE	COPD	ASTHMA	Surl
▶ 1			STROKE,COPD,ASTHM		STROKE	COPD	ASTHMA	Cha
2			CHD,ASTHMA	CHD			ASTHMA	Beer
3			CHD,COPD,ASTHMA	CHD		COPD	ASTHMA	Mun
4			CHD,COPD	CHD		COPD		Crill
5			CHD,STROKE	CHD	STROKE			Alex
6			STROKE		STROKE			Myth
7			CHD	CHD				Marl
8			CHD,COPD	CHD		COPD		Brea
9			CHD,COPD	CHD		COPD		Mac
10			CHD	CHD				Man
11			STROKE		STROKE			Herr
12			COPD,AS				MA	Juer
13			CHD					Rou
14			STROKE					Coc
15			ASTHMA				MA	Kell
16			STROKE					Bacl
17			CHD					Wak
18			CHD	CHD				Myn
19			CHD	CHD				Crav
20			CHD	CHD				Cull



Right click over any highlighted patient and select 'Delete Patients from Search'.



Click OK.

Your search now has housebounds removed.

## Creating invite labels for repeat prescription patients

In this section you will be shown how to:

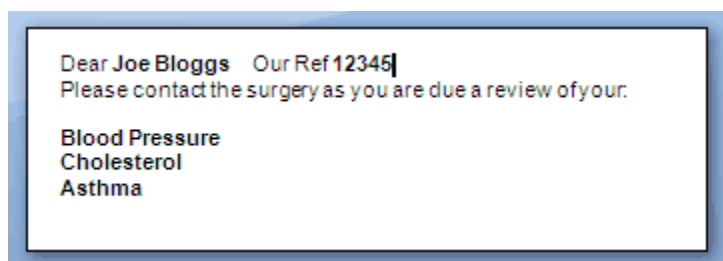
- Print automated invite labels for repeat prescriptions patients.

The label printing tool runs alongside EMIS while a receptionist is printing the day's repeat prescriptions.

It enables you to produce labels for adhering on to repeat prescriptions which highlight to the patient what they are being invited for.

You can target any group of patients requiring a review.

For example, target those coming in to collect their repeats that require a flu jab, those who require a blood pressure or cholesterol check or perhaps those who are due a review of their chronic disease/s.

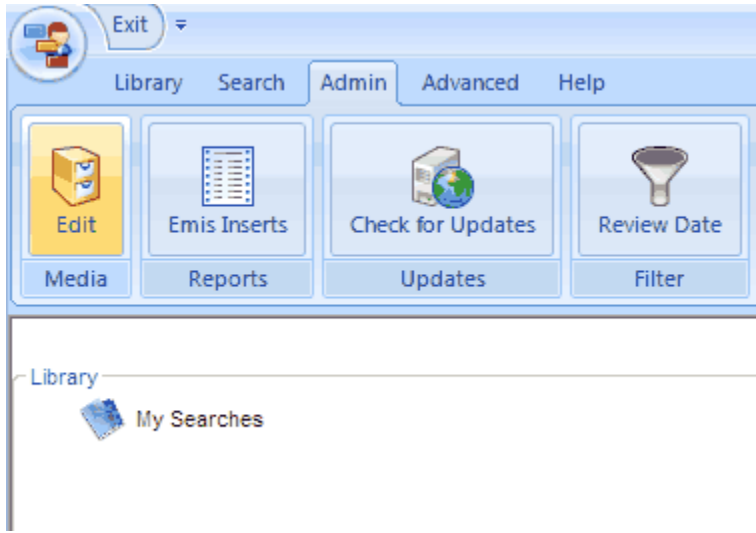


The label printing feature can be used as a supplementary way of recalling your patients for review, in addition to sending them PatientChase letters.

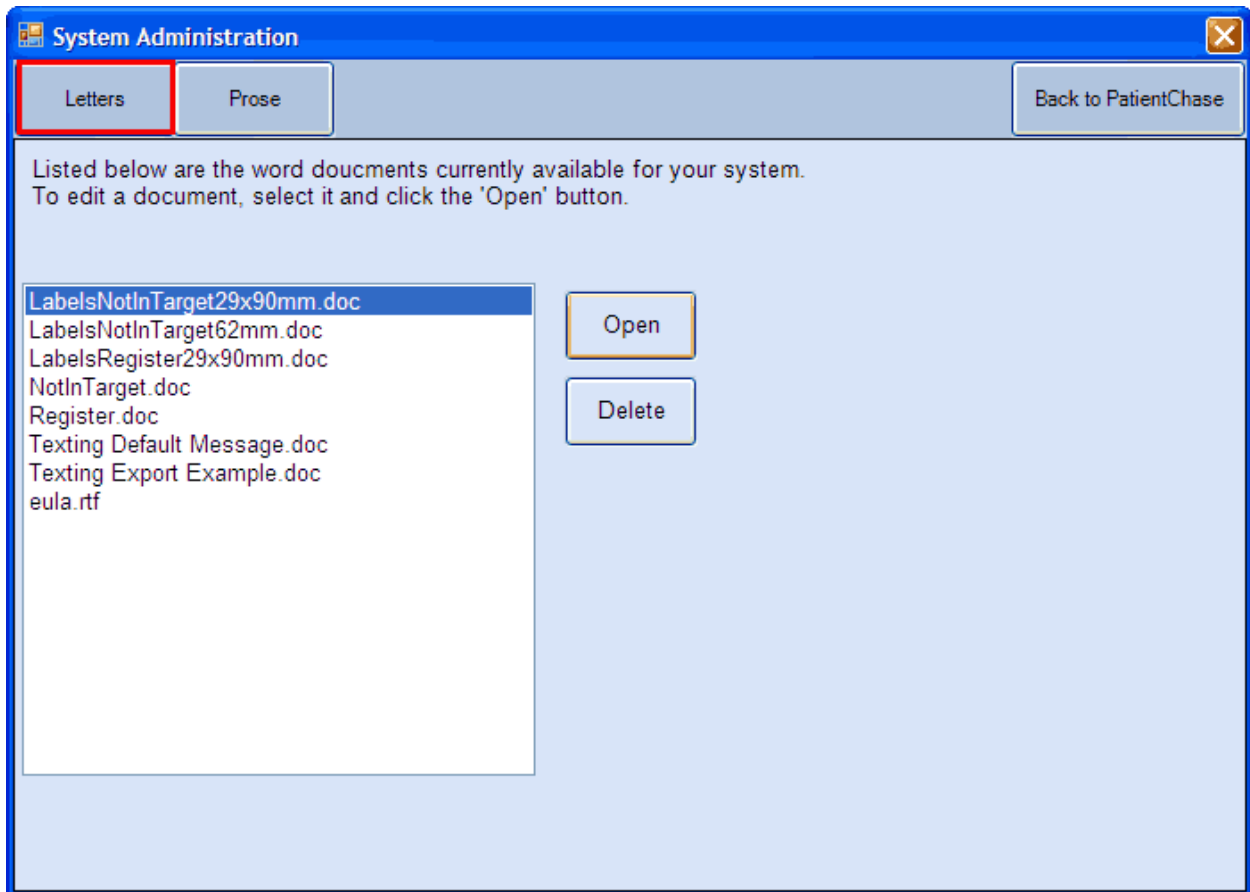
The example in this section uses patients requiring any combination of CHD, Stroke, COPD and Asthma QOF targets but labels can be created for ANY PatientChase search.

**NOTE: You will need access to a label printer.**

Step 1 – Open one of the supplied label templates in order to customise it.

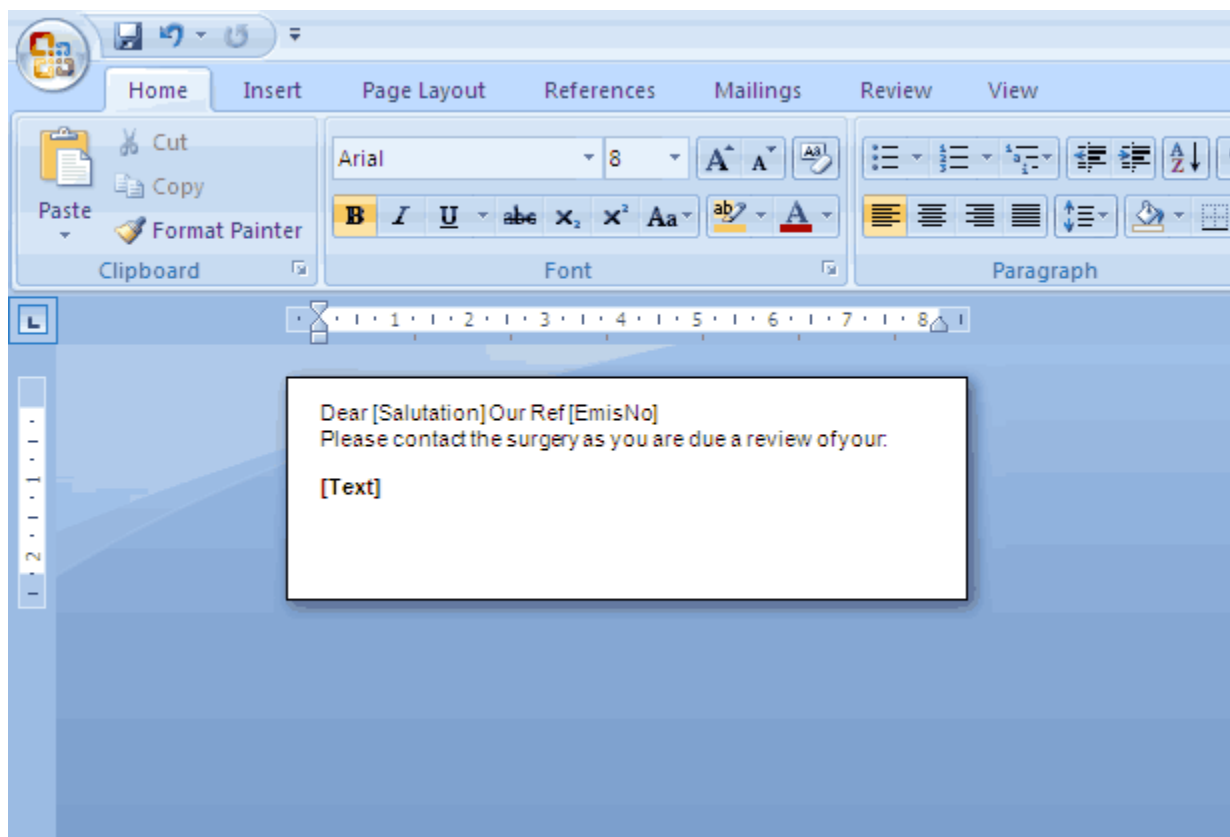


Click on the 'Admin' tab then Click 'Edit'.



Click the 'Letters' button then open one of the 3 label templates.

Step 2 - Customise the label template.



The default wording is shown above.

Change the layout and wording how you see fit but remember there is very little space on a label.

Step 3 shows you how to change the automated terms in the [Text] field.

Click 'Save' and exit Microsoft Word when you are happy with the look of your label.

Step 3 - Changing the automated terms in the [Text] field.

The screenshot shows a 'System Administration' window with a 'Prose' tab selected. The window title is 'System Administration' and it has a 'Back to PatientChase' button. The main content area is titled 'Amend the short text (for Labels and Texting) or Prose (for Letters)'. Below this is a table with the following columns: Target, Type, Short Text, and Prose for Letters. The 'Short Text' column is highlighted with a red box.

Target	Type	Short Text	Prose for Letters
AF1 - Patients on AF Register	Register	Irregular Heart Beat	You have a history of an irregular heart.
AF3 - AF on Anticoagulation	NotInTarget	Medication	You should be on Medication to help thin the blood.
AF4 - New AF with ECG	NotInTarget	Irregular Heart Beat	You have recently been diagnosed as having an irregular heart beat not confirmed on a Heart Monitor.
ASTHMA1 - Patients on Asthma register	Register	Asthma	You have a history of Asthma.
ASTHMA3 - 14>19 + smoking history	NotInTarget	Smoking Status	Your Smoking Status has not been recorded recently.
ASTHMA6- Rev in last 15m	NotInTarget	Asthma	You have not had a review recently for your condition.
ASTHMA8 - >1/4/06+ rev testing	NotInTarget	Asthma	Your Asthma needs to be confirmed with a lung test.
BP1 - Patients on BP Register	Register	Blood Pressure	You have a history of High Blood Pressure and are on Medication for this.
BP4 - BP check in last 9 months	NotInTarget	Blood Pressure	Your Blood Pressure has not been recorded recently.
BP5 - BP 150/90 or less	NotInTarget	Blood Pressure	Your last Blood Pressure reading was too high.
CANCER1 - On Cancer Register >1/4/03	Register	Cancer	Have had a diagnosis of Cancer in the last few years.
CANCER3 -Cancer Rev from diagnosis	NotInTarget	Cancer	You have not had a cancer review recently.

In PatientChase, click on the 'Admin' tab, click 'Edit' then click the 'Prose' button.

The short text column contains the terms which may appear on the labels.

Run through the column and change any you wish by clicking on the term.

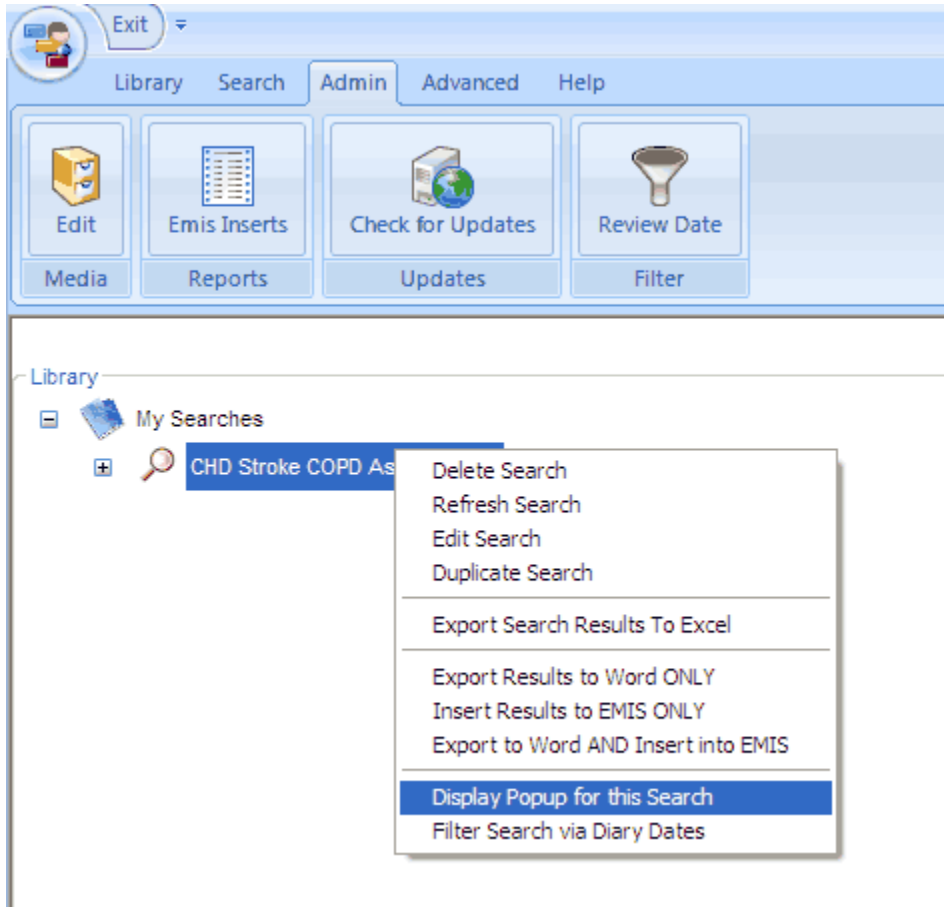
When you are done, click 'Back to PatientChase'.

Step 4 - Create a PatientChase search for the group of patients you wish to create labels for.

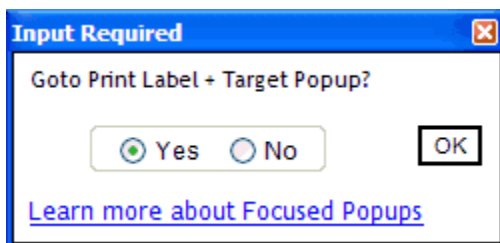
If you are unsure how to do this, read one of the following sections:

- [Mail Merging – Creating QOF letters - steps 1-6](#)
- [Mail Merging – Creating month of birth recall letters - steps 1-6](#)
- [How do I create searches which I can export to Excel? - steps 1-6](#)

Step 5 - Open the label printing tool.

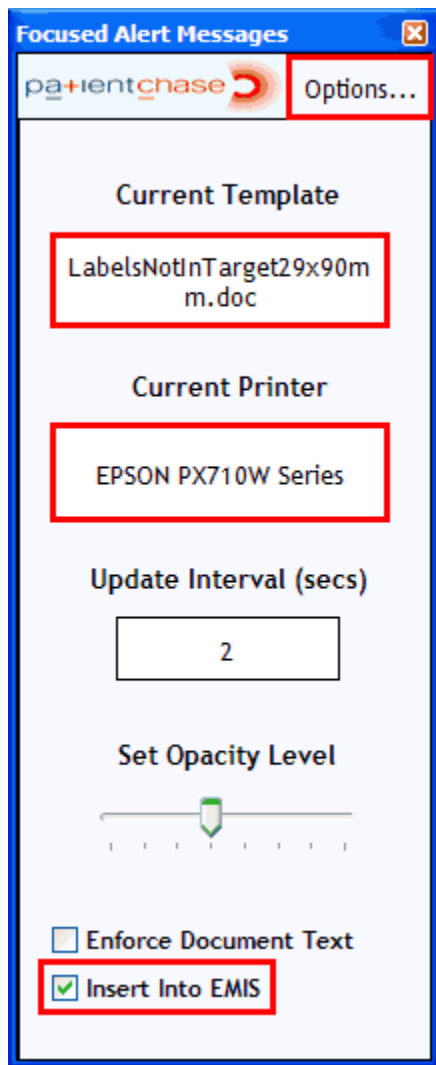


Right click over the search name and select 'Display Popup for this Search'.



Click OK.

Step 6 - Set up your Options.



Click on the 'Options' button and select the template you customised earlier and also select the label printer you will be using.

Click the 'Insert into EMIS' box if at a later date you wish to be able to search medical records for labels sent to patients (many PCTs allow a label to constitute being a method of contact with a patient).

When you have finished with the options, click the 'Options' button again.

Step 7 – In EMIS, begin your repeat prescription printing as normal.

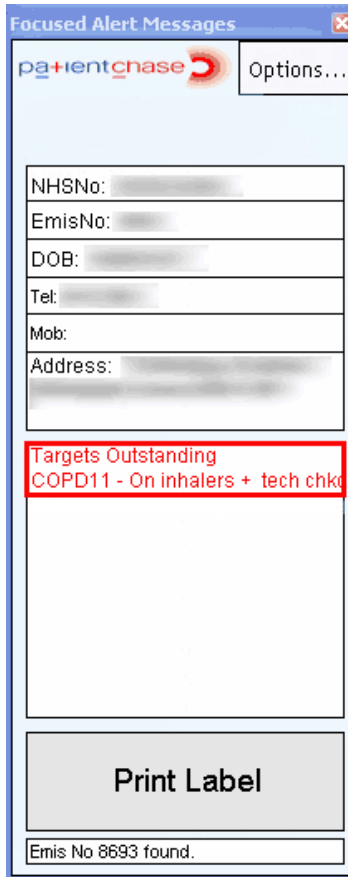
You will notice that the 'Focused Alert Message' remains in the foreground and is semi-transparent.

You may wish to drag this pop-up box to the top right of your screen in order to maintain your full view of EMIS.

Step 8 – Printing a label for a matched patient.

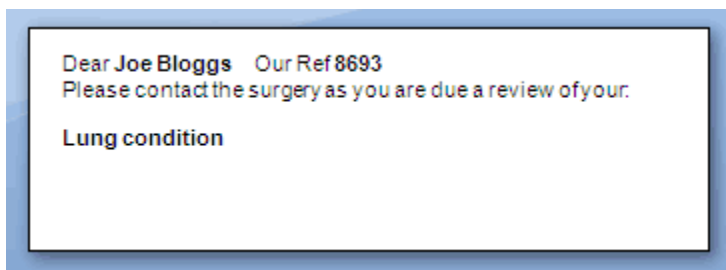
Each time you go into a medical record, PatientChase will check to see if the patient matches your label criteria.

If they do, the Focused Alert Message box will populate with their details:



Simply click the 'Print Label' button and a personalised label will print to your label printer.

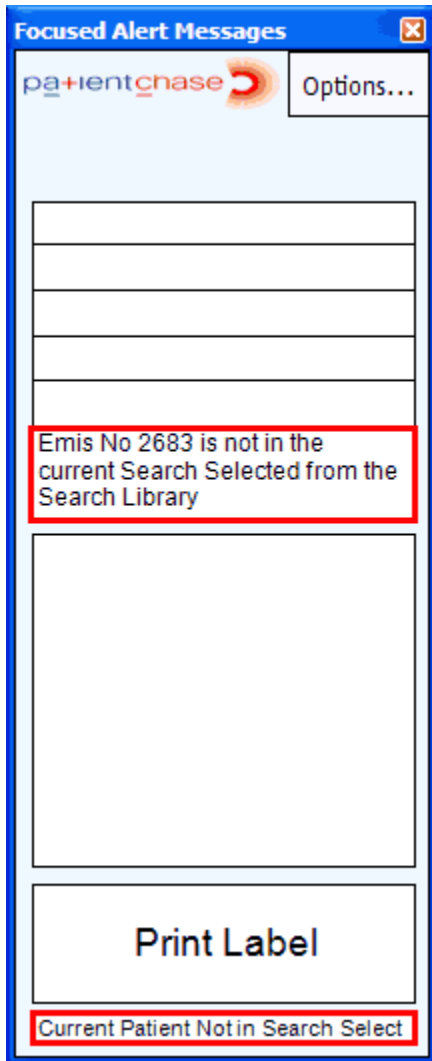
It will look something like this:



Whenever you go into other patient records where they match the PatientChase search then the Focused Alert Message will populate with the new patient's details.

Simply click the 'Print Label' button whenever the details change.

Whenever you come across a patient in EMIS that does not match the criteria of your PatientChase search, the Focused Alert Message goes blank, like in this screenshot:



In those cases, there is clearly no label to print.

Step 9 – Matching the labels to the repeat prescriptions.

The image shows a patient invitation form with several sections:

- Pharmacy Stamp**: A green stamp area with fields for Age, Title, Forename, Surname & Address, D.o.B., and NHS Number.
- Text Instructions**: "YOU CAN NOW REQUEST YOUR PRESCRIPTIONS AND BOOK APPOINTMENTS FROM THE INTERNET. PLEASE ASK AT THE FRONT DESK. PLEASE TICK BOX. ALLOW 72 HRS FOR COLLECTION. Usual Doctor: [redacted] Date Printed: 12/12/2011"
- Prescription Details**: "Salbutamol Cfc-Free Inhaler 100 micrograms/puff AS DIRECTED Quant: 1 inhaler Next Issue Due:"
- Message Box (Red Box)**: "Dear **Joe Bloggs** Our Ref 8693 Please contact the surgery as you are due a review of your **Lung condition**"
- Signature and Date**: Fields for "Signature of Prescriber [BLANK LHS]" and "Date".
- Dispenser Information**: "For dispenser No. of Prescns. on form" with a grid of dots.
- NHS Logo**: Located at the bottom left.
- Footer**: "PATIENTS – please read the notes overleaf" in a box at the bottom right.

Once you have finished running off all your repeat prescriptions, simply match the printed adhesive labels with the printed prescriptions, ready for signing and then collection by the patient.

## Reporting on letters inserted into EMIS (inc. Exception Reporting)

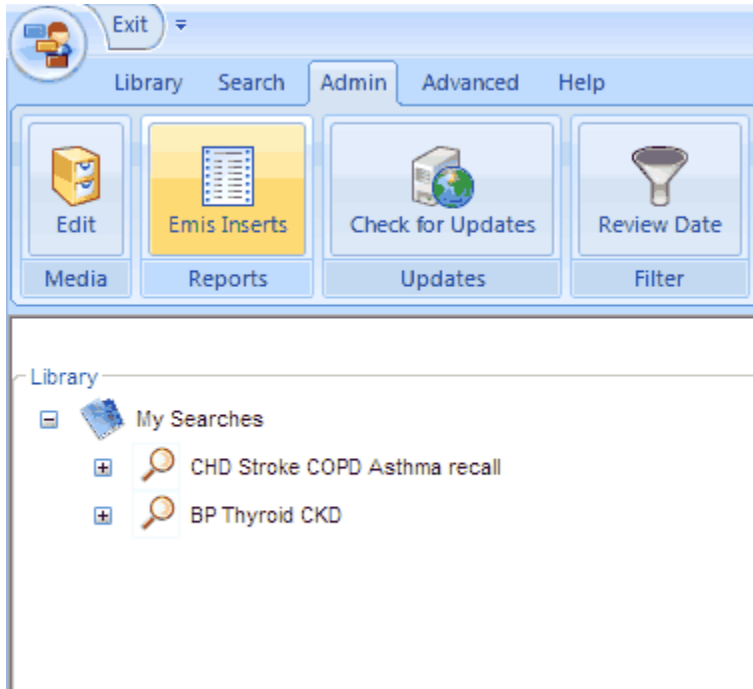
In this section you will be shown how to:

- Use PatientChase's reporting tool to identify which patients have PatientChase letters in their medical records and how many they have been sent.

The reporting tool facilitates very easy exception reporting for the QOF year.

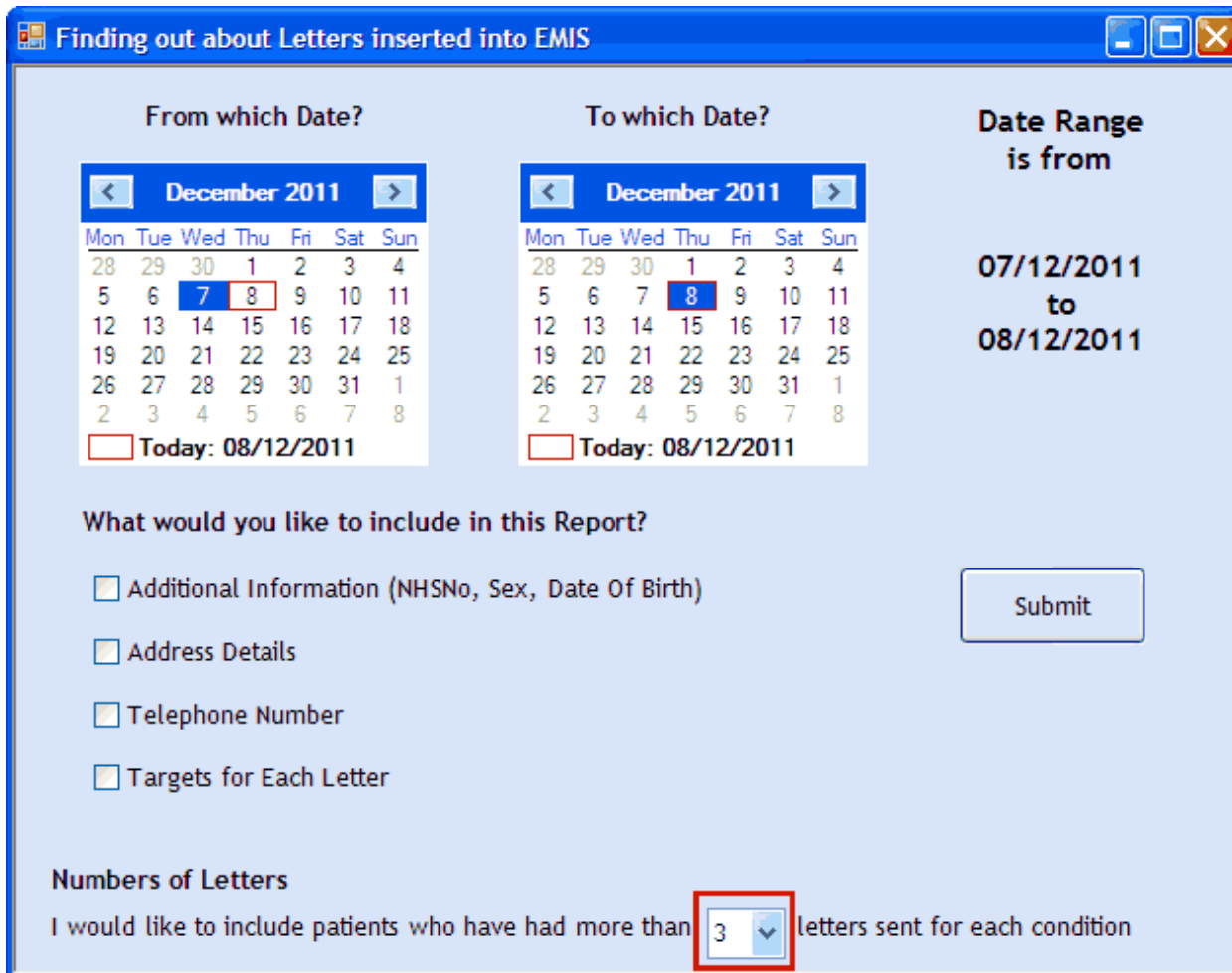
**NOTE: The reporting tool will only work if you have been previously 'inserting into EMIS' patients in your PatientChase searches.**

Step 1 – Open the reporting tool



Click on the Admin tab, then click the 'EMIS Inserts' button.

## Step 2 – Select your search criteria



**Finding out about Letters inserted into EMIS**

**From which Date?**

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: 08/12/2011

**To which Date?**

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: 08/12/2011

**Date Range is from**

**07/12/2011**  
to  
**08/12/2011**

**What would you like to include in this Report?**

Additional Information (NHSNo, Sex, Date Of Birth)

Address Details

Telephone Number

Targets for Each Letter

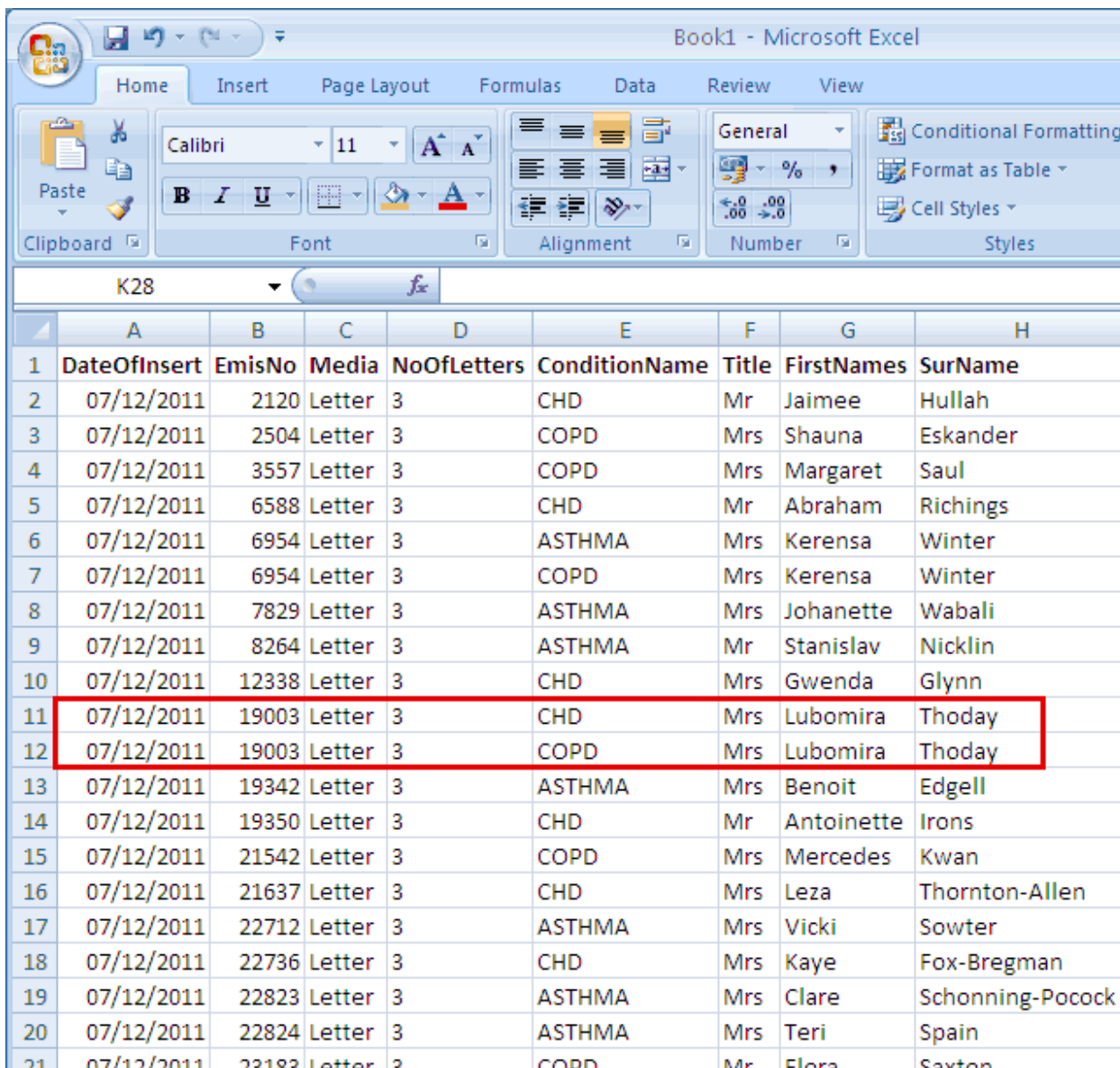
**Numbers of Letters**

I would like to include patients who have had more than  letters sent for each condition

You'll need to decide:

- 1) What date range you wish to focus on. The example above has a date range of only 1 day but typically surgeries search from the 1<sup>st</sup> April to the present day.
- 2) Whether you want to view the optional information for each patient. If so, click the relevant box.
- 3) Whether you wish to filter the results by a minimum number of letters. In the example above, only patients who have received 3 or more letters will be listed.

Click Submit.



	A	B	C	D	E	F	G	H
1	DateOfInsert	EmisNo	Media	NoOfLetters	ConditionName	Title	FirstNames	SurName
2	07/12/2011	2120	Letter	3	CHD	Mr	Jaimee	Hullah
3	07/12/2011	2504	Letter	3	COPD	Mrs	Shauna	Eskander
4	07/12/2011	3557	Letter	3	COPD	Mrs	Margaret	Saul
5	07/12/2011	6588	Letter	3	CHD	Mr	Abraham	Richings
6	07/12/2011	6954	Letter	3	ASTHMA	Mrs	Kerensa	Winter
7	07/12/2011	6954	Letter	3	COPD	Mrs	Kerensa	Winter
8	07/12/2011	7829	Letter	3	ASTHMA	Mrs	Johanette	Wabali
9	07/12/2011	8264	Letter	3	ASTHMA	Mr	Stanislav	Nicklin
10	07/12/2011	12338	Letter	3	CHD	Mrs	Gwenda	Glynn
11	07/12/2011	19003	Letter	3	CHD	Mrs	Lubomira	Thoday
12	07/12/2011	19003	Letter	3	COPD	Mrs	Lubomira	Thoday
13	07/12/2011	19342	Letter	3	ASTHMA	Mrs	Benoit	Edgell
14	07/12/2011	19350	Letter	3	CHD	Mr	Antoinette	Irons
15	07/12/2011	21542	Letter	3	COPD	Mrs	Mercedes	Kwan
16	07/12/2011	21637	Letter	3	CHD	Mrs	Leza	Thornton-Allen
17	07/12/2011	22712	Letter	3	ASTHMA	Mrs	Vicki	Sowter
18	07/12/2011	22736	Letter	3	CHD	Mrs	Kaye	Fox-Bregman
19	07/12/2011	22823	Letter	3	ASTHMA	Mrs	Clare	Schonning-Pocock
20	07/12/2011	22824	Letter	3	ASTHMA	Mrs	Teri	Spain
21	07/12/2011	23183	Letter	3	COPD	Mr	Flora	Saxton

Upon clicking 'Submit', Excel opens displaying the patients matching your search criteria.

The example above shows those patients who have been sent 3 or more letters by PatientChase.

Notice the patient highlighted has two entries. This is because they were sent a co-morbidity letter 3 times. In other words the each time the letter was sent it highlighted to the patient they were being invited in for both CHD and COPD review.

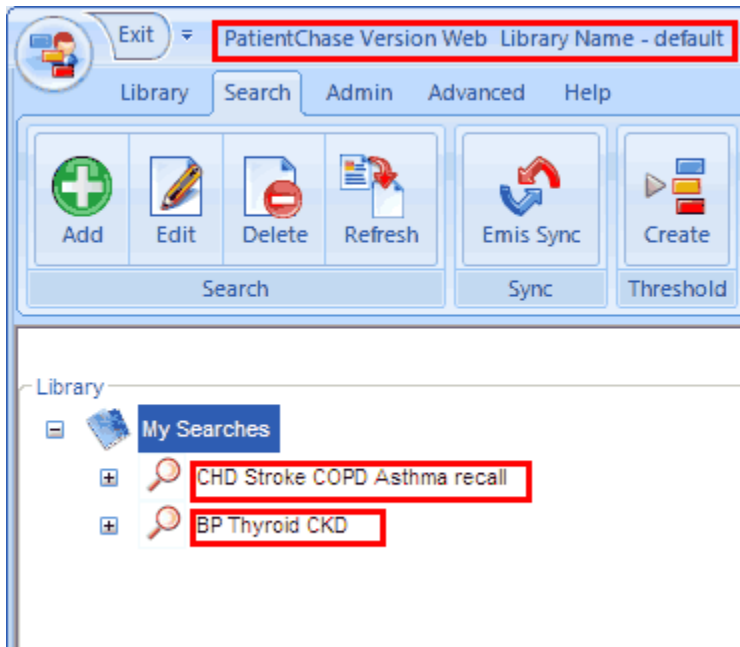
For exception reporting purposes, the patient can be excepted for both CHD and COPD.

## Sharing your Searches

In this section you will be shown how to:

- Share your searches on the network so they can be accessed by other computers running PatientChase.

Step 1 – Familiarise yourself with 'My Searches'



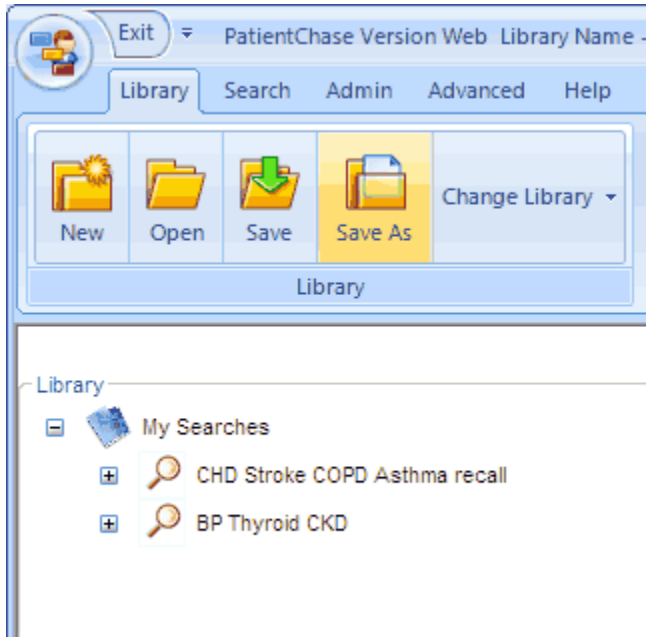
All your searches are stored within a library.

You can have many searches stored within the library. Notice the library above has two searches in it.

By default, your library is saved on your PC's hard drive in the patientchase2.0 folder.

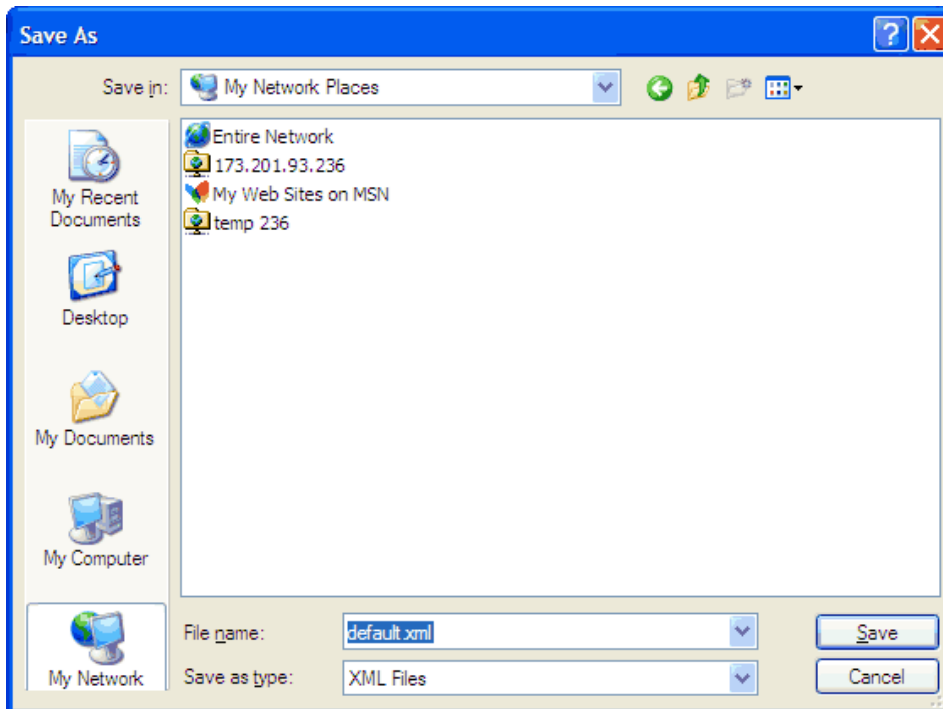
By default, the library is called 'default'. Notice the title at the top.

Step 2 – Sharing your library on your network.

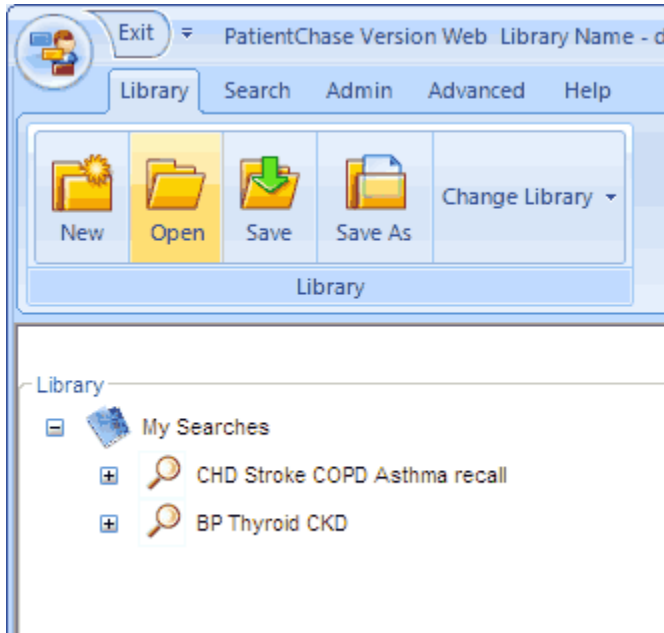


Sharing, saving and opening your library is done in the same way as you do other files in Windows.

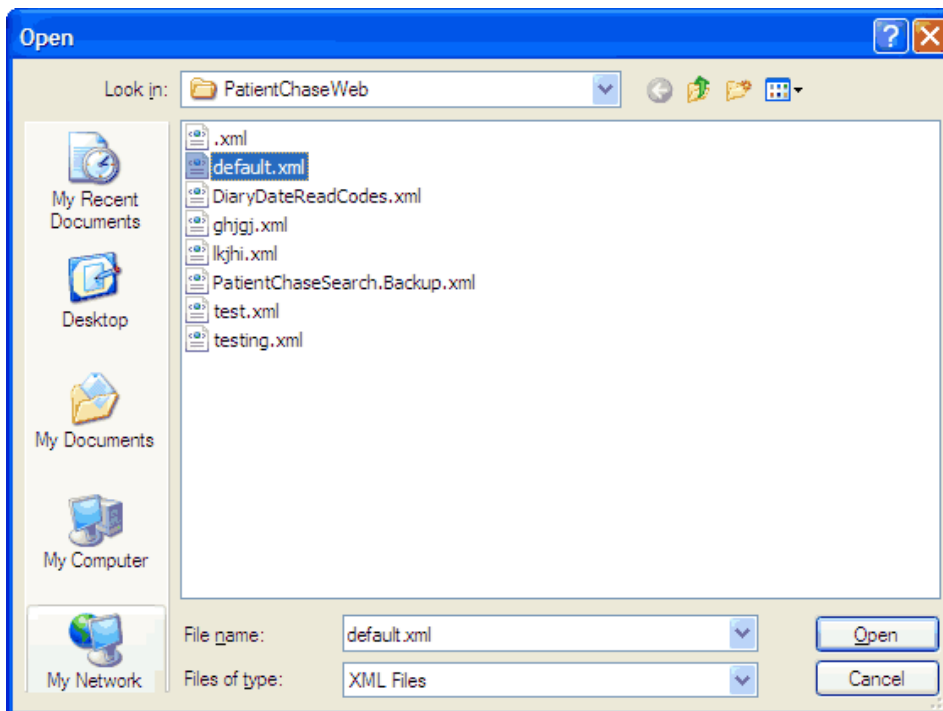
In other words, to share your library (and therefore your searches) on the network, click the Library tab, click 'Save As' and save the file to your network/shared location.



Step 3 – Opening the library from another PC.



Click the Library tab, click 'Open' and locate the file on your network. Click 'Open'.



Remember, to avoid a 'network sharing violation' you'll need to save a local copy of the file to your PC or close your copy of PatientChase if another PC is accessing the file.