

# How to Run a Bulk Patient Search in PMP AWARxE

## Bulk Patient Search Overview

The Bulk Patient Search is similar to the normal Patient Request (search). It however allows the entry of multiple patients at once rather than one at a time. Patient names are either entered manually or via an uploaded CSV file. To access Bulk Patient Search, navigate to **Menu > RxSearch > Bulk Patient Search**.

The screen is comprised of two tabs, the Bulk Patient Screen which is the landing page and is where the user can start a new search, and the Bulk Search History tab, used for reviewing the results of a request or viewing previous request results.

Bulk patient searches can be submitted two ways, either by manual entry of patient information or by file upload.

### Manual Entry

1. Enter First Name, Last Name, DOB (and any other state required fields)
2. Click the *Add* button after each entry.

The screenshot shows the 'Bulk Patient Search' interface. At the top, there are two tabs: 'Bulk Patient Search' (active) and 'Bulk Search History'. The page is powered by 'AWARxE'. The main heading is 'Bulk Patient Search'. Below this, a question asks 'How do you want to enter patients?' with two radio button options: 'Manual Entry' (selected) and 'File Upload'. A note indicates '\* Indicates Required Field'. Under the 'Manual Entry' section, there are four input fields: 'First Name\*', 'Last Name\*', 'Date of Birth\*' (with a placeholder 'MM/DD/YYYY'), and 'Zip Code'. A purple '+ Add' button is located to the right of the 'Zip Code' field.

### File Upload

1. Click the radio button for "File Upload"
2. Download the Sample CSV by clicking "View Sample File"
3. Fill out the required fields and upload the file.
4. Click Validate Format to download a validation report and ensure all records were entered correctly. Null values in the Errors columns indicate acceptable data. If a search is submitted with an invalid file, this will result in a validation error for the search. The file must be corrected and the search resubmitted with the corrected file.

Bulk Patient Search
Bulk Search History

### Bulk Patient Search

**How do you want to enter patients?**

Manual Entry

File Upload

**File Upload** \* Indicates Required Field

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

No File Chosen
Choose File
Clear

Validate Format

Once the user has entered patients for their search either manually or via file upload, the user complete the following instructions.

#### Submitting the Bulk Patient Search

1. Create a Group Name for the search. Group name is required. If group name is not selected, the request will result in a validation error for the search.
2. Select additional states for your search if necessary/available.
3. Click *Search*.
  - a. An acknowledgment may be available, and users may be required to acknowledge they have read it if configured by the State Administrator.

A status message will appear.

**Success**

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

DISMISS

4. To obtain the results of the search, click the Bulk Search History tab to the right of the Bulk Patient Search tab.

Bulk Patient Search
Bulk Patient History

### Bulk Search History

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

Bulk Search Name	Number of Patients	Date Requested	Processing	Incomplete	Ready
test group	2	10-14-2017	0	0	2
test group	2	10-14-2017	0	2	0

- a. The Bulk Search History tab will display previous bulk searches. This screen will indicate whether your search results are still processing with a total number of searches still to be processed. It will provide a total count of patients in your search in the “Number of patients” column. It will indicate a count of patient records it could not find in the “Incomplete” column. It will indicate a count of patent search results available in the “Ready” column.
5. Click the Bulk Search Name (which is a hyperlink) to see the results of the search.
6. Click a patient name within the search results. Details of the patient search will appear at the bottom of the page.

Bulk Patient Search
Bulk Patient History

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Group Name

**test group**

Prescription Fill Dates: 10/14/2015 - 10/14/2017

PMP InterConnect States:

Report Prepared: 10/14/2017 12:08 AM

**Bulk Patient Summary**

Select a patient to view the report

Patient Full Name	DOB	Prescribers	Dispensers	Prescriptions	Supervisor	Status
bob testpatient	01/01/1900	3	2	5		Ready
dave testpatient	01/01/1900	5	4	12		Ready

**bob testpatient** [Refresh](#) View

Date of Birth: 01/01/1900

Location:

PMPi States:

Reason:

Prescription Fill Dates: October 14, 2015 until October 14, 2017

7. Click *View* to see the actual Patient Report, or Click *Refresh* if you are reviewing a previous report and wish to run a current report. For more information on the viewing the results, see the [Viewing the Patient Rx Request](#) section.


#### Viewing the Patient Rx Request


1. The Patient Rx Request report screen is comprised of four main sections: Patient Information, Prescriptions, Prescribers, and Dispensers.


# Patient Report [Refine Search](#)

Report Prepared: 11/01/2017  
Date Range: 11/01/2016 – 11/01/2017


 [Download PDF](#)  [Download CSV](#)


 Alice Testpatient

 Summary

 Prescriptions

Per CDC guidance, the conversion factors and associated daily morphine milligram equivalents for drugs prescribed as part of medication-assisted treatment for opioid use disorder should not be used to benchmark against dosage thresholds meant for opioids prescribed for pain.

 Prescribers

 Dispensers



# Patient Report [Refine Search](#)

Report Prepared: 07/06/2017 07:15PM

Date Range: 07/12/2016 - 07/12/2017



← Alice Testpatient

## Linked Records

Name	DOB	ID	Gender	Address
Patient Name	01/01/1900	1	Female	832 Not Real Patient Driv Wichita, KS 67205
Patient Name	01/01/1900	2	Female	832 Not Real Patient Driv Wichita, KS 67205
Patient Name	01/01/1900	3	Female	832 Not Real Patient Driv Wichita, KS 67205

## Report Criteria

First Name	Last Name	DOB
Patient Name	Patient Name	01/01/1900

⊖ Prescriptions

## Summary

Total Prescriptions: 4  
 Prescribers: 4  
 Pharmacies: 3  
 Private Pay: 2  
 Active Daily MME: 0.0

Filled	ID	Written	Drug	Qty	Days	Prescriber	RX #	Pharmacy*	Refill	MME/D	Pymt Type	PMP
06/18/2017	120	06/18/2017	Tramadol HCL 50 MG Tablet	120	30	Ge Ben	1234	Walmart (4567)	0	20.00	Comm Ins	OH
06/18/2017	120	06/18/2017	Tramadol HCL 50 MG Tablet	120	30	Ge Ben	234234	Walmart (3123)	0	20.00	Comm Ins	OH
06/18/2017	120	06/18/2017	Tramadol HCL 50 MG Tablet	120	30	Ge Ben	234234	Walmart (1234)	0	20.00	Private Pay	OH
06/18/2017	120	06/18/2017	Tramadol HCL 50 MG Tablet	120	30	Ge Ben	345345	Walmart (4567)	0	20.00	Private Pay	OH

\* Pharmacy is created usign a combination of pharmcy name adn the last four digits of the pharmacy license number.

Per CDC guidance, the conversion factors and associated daily morphine milligram equivalents for drugs prescribed as part of medication-assisted treatment for opioid use disorder should not be used to benchmar against dosage thresholds meant for opioids prescribed for pain.

⊕ Prescribers

⊖ Dispensers

## Dispensers

Pharmacy	Address	City	State	Zipcode	Phone
Walmart	5297 Hazy Forest Lane	Brooklyn Heights	OH	45508-8557	675-780-9898
Walmart	5297 Hazy Forest Lane	Brooklyn Heights	OH	45508-8557	
Walmart	5297 Hazy Forest Lane	Brooklyn Heights	OH	45508-8557	
Walmart	5297 Hazy Forest Lane	Brooklyn Heights	OH	45508-8557	

- At the top of the request, the report displays the date the request was run and the date range used to create the request.

3. If configured for the account type by the State Administrator, buttons may also be present that will allow the user to save the report as a PDF document or to save the report as a CSV data file.
4. The Patient Information section displays the search criteria used to search for the patient. It will also display all known patient names, birthdates, and addresses that have been matched to the patient the user searched.
  - a. The table can represent instances of a patient with multiple addresses, misspellings of names, etc.
  - b. The table also lists an ID number that will match a patient's address information to a prescription from the prescription table.
5. The Prescriptions table lists information related to each prescription issued to the patient within the search period entered.
  - a. The Patient ID column is used to provide a link between a specific prescription and the patient name/location information.
6. The Prescribers table displays the information for all prescribers who issued a prescription to the patient within the search period used.
7. The Dispensers table displays the information for all Dispensers who filled a prescription to the patient within the search period used.
8. Each section is collapsible. Users can click on the plus signs next to each section to expand or collapse each section.
9. Each section's tables can be resized to show more or less records. Users can click and drag the bottom of the table with their mouse to resize. A minimum of 2 rows are required to be displayed.
10. Columns in each section can be sorted. Clicking on a column header will allow the results to be sorted in ascending or descending order based on the column selected.
  - a. Column sorting is saved when exporting the request.