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 that 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.

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.

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.

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

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.

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

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Patient Report Refine Search
Report Preparted: 07/06/2017 07:15PM
Date Range: 07/12/2016 - 07/12/2017

[PDF] Download PDF   [CSV] Download CSV

⊖ 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	

2. 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.