

Quick Reference Guide – 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**. (Note that Bulk Patient Search may not be available for your user role.)

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 Prescription Fill Dates (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' (selected) and 'Bulk Search History'. The page is powered by 'AWARxE'. The main heading is 'Bulk Patient Search'. Below this, a section titled 'How do you want to enter patients?' contains two radio buttons: '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 completes 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 Patient 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 Patient 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.