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 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.** (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.

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 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.

4. To obtain the results of the search, click the Bulk Patient 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 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.

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.