

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](#)

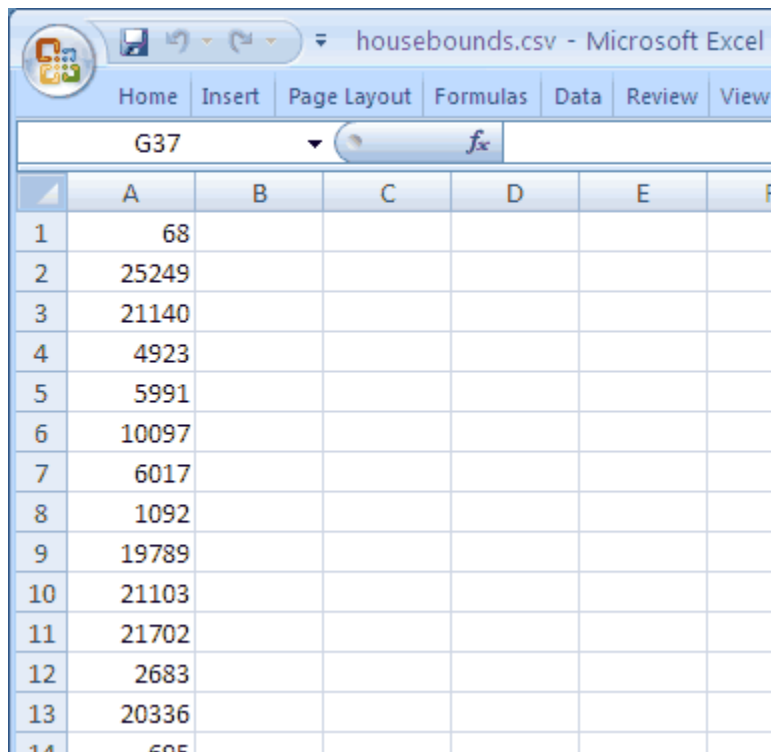
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Step 2 – Run a housebound search in EMIS.

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					

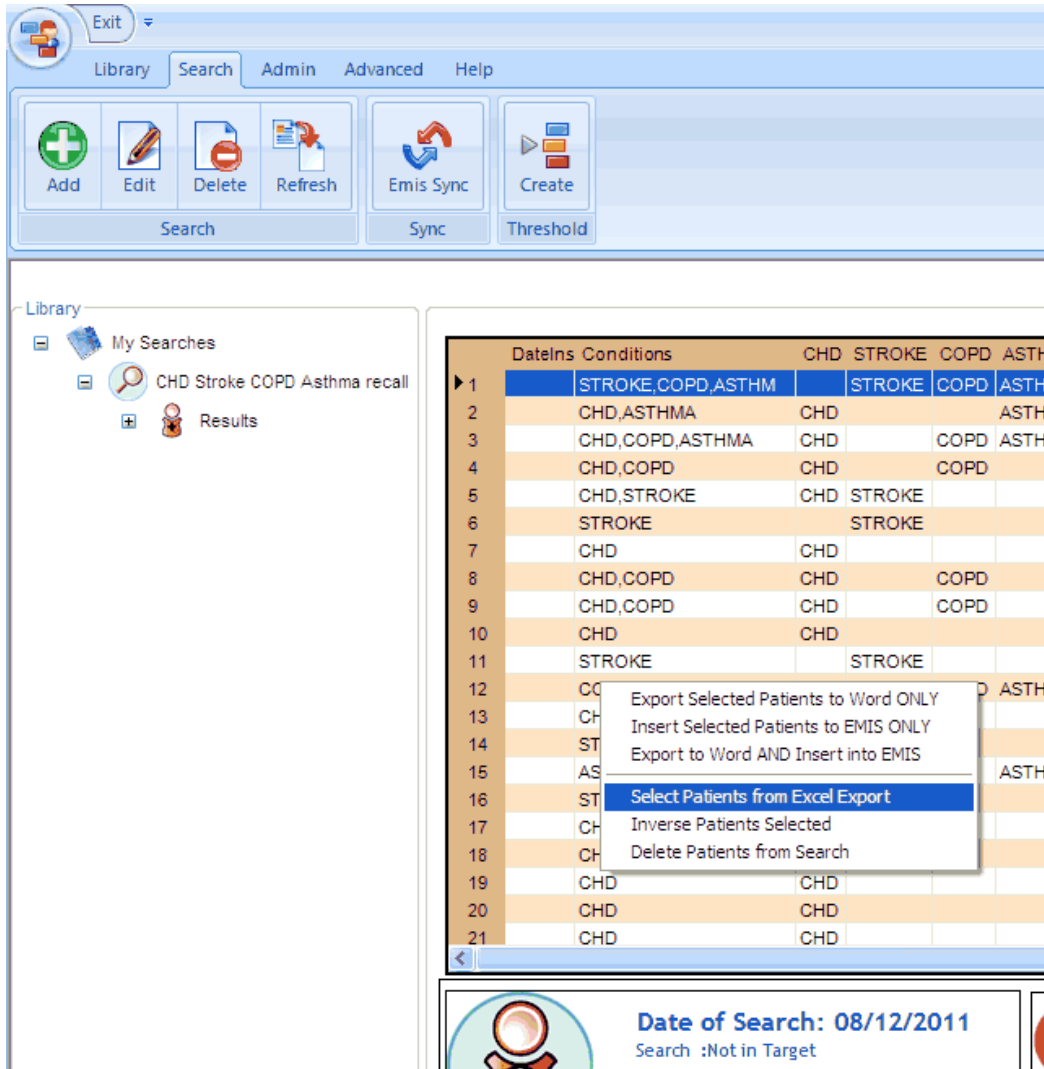
Make sure the first column is the Patient Number field.

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

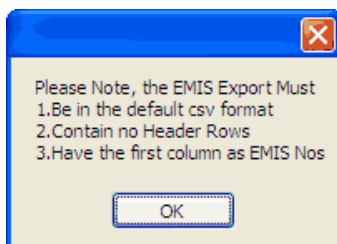
Save the file as a CSV file on your desktop.

Close Excel.

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

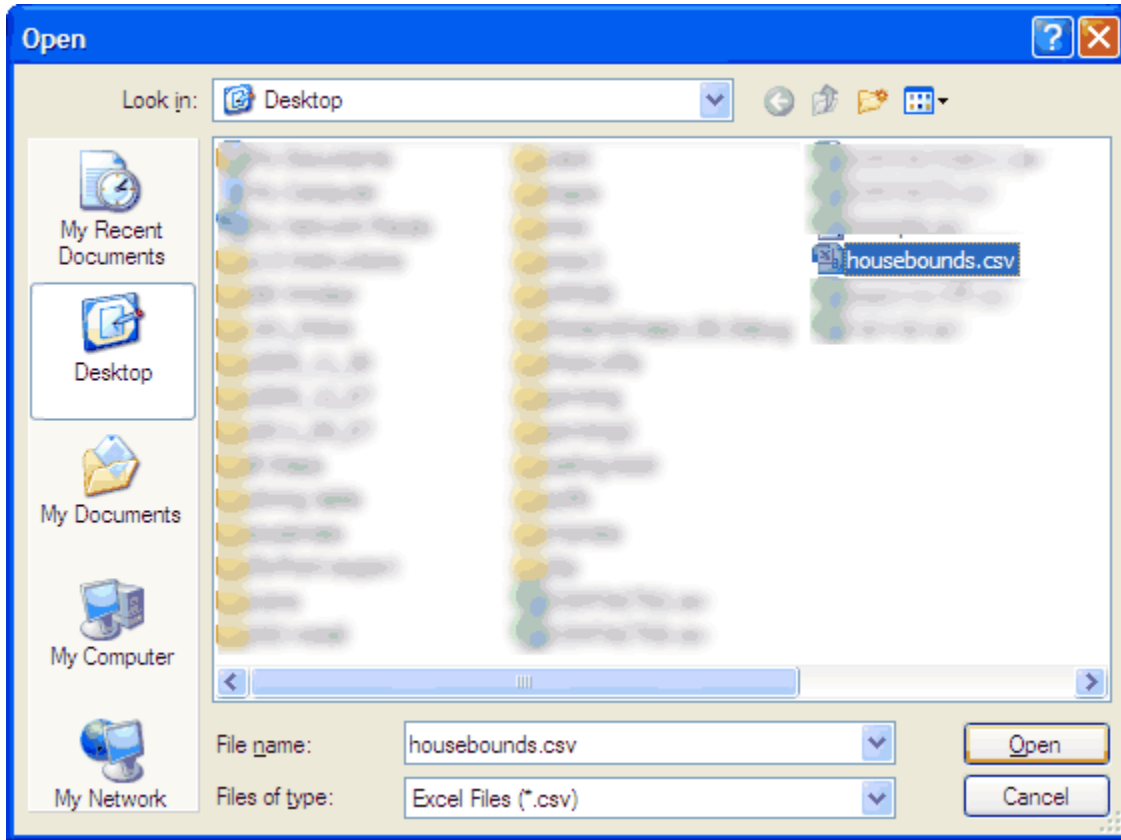


Right click anywhere in the right panel and click 'Select Patients from Excel Export'.

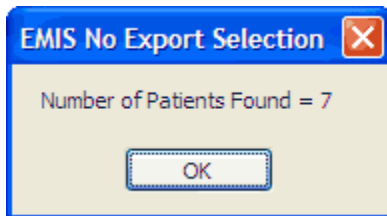


A box will appear reminding you of the required format of the file you created in Excel.

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



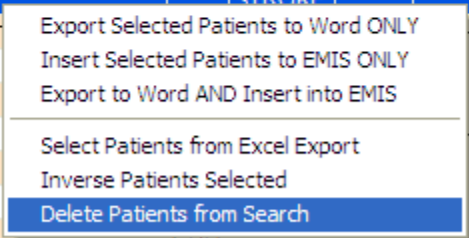
Click Open.



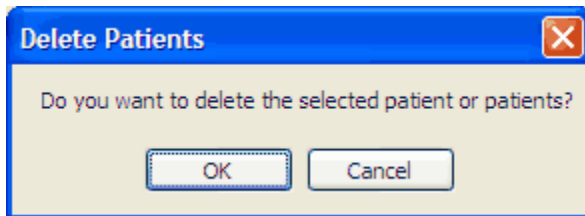
PatientChase will highlight in blue those patients matching your criteria.

Step 5 – Removing the housebound patients.

Date	Ins	Conditions	CHD	STROKE	COPD	ASTHMA	Surf
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.