Search and Reports

Creating Ad-hoc Searches User Guide

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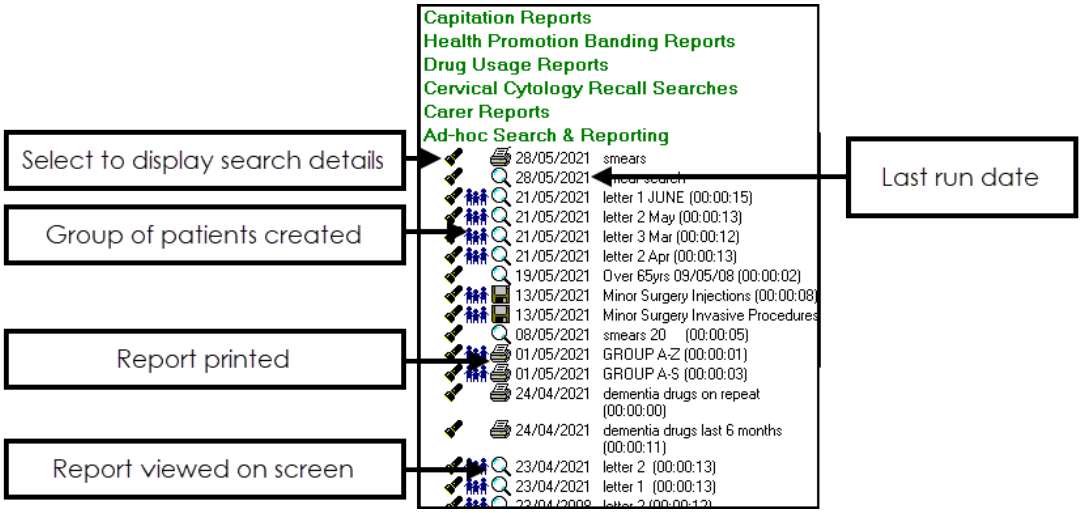
An Overview of Searches

You can search for data entered in **Consultation Manager** or **Registration** in the following ways:

- **Ad-hoc searches** - These are defined by your practice or can be imported from a ICS / Health Board or another practice. You can sort the list of ad-hoc Searches by name or date, and filter by user, date range or keyword in description.
- **Template Searches** - These are pre-defined searches for you to use as a starting point when creating your own searches. Select the one you require from **Templates**, using **Save As**, save it with your naming convention and then edit it as required.
- **Batching and Scheduling searches** - Group searches together in a folder, and process as a batch.
- **By Registration detail** - Searches can be based on either the whole patient database or a sub-section of patients according to, for example, age, sex or registered GP.

Viewing Existing Searches

From Search and Reports, select a green heading of any category, such as **Ad-Hoc Search & Reporting** to expand the list of existing searches. Select again to close the list:



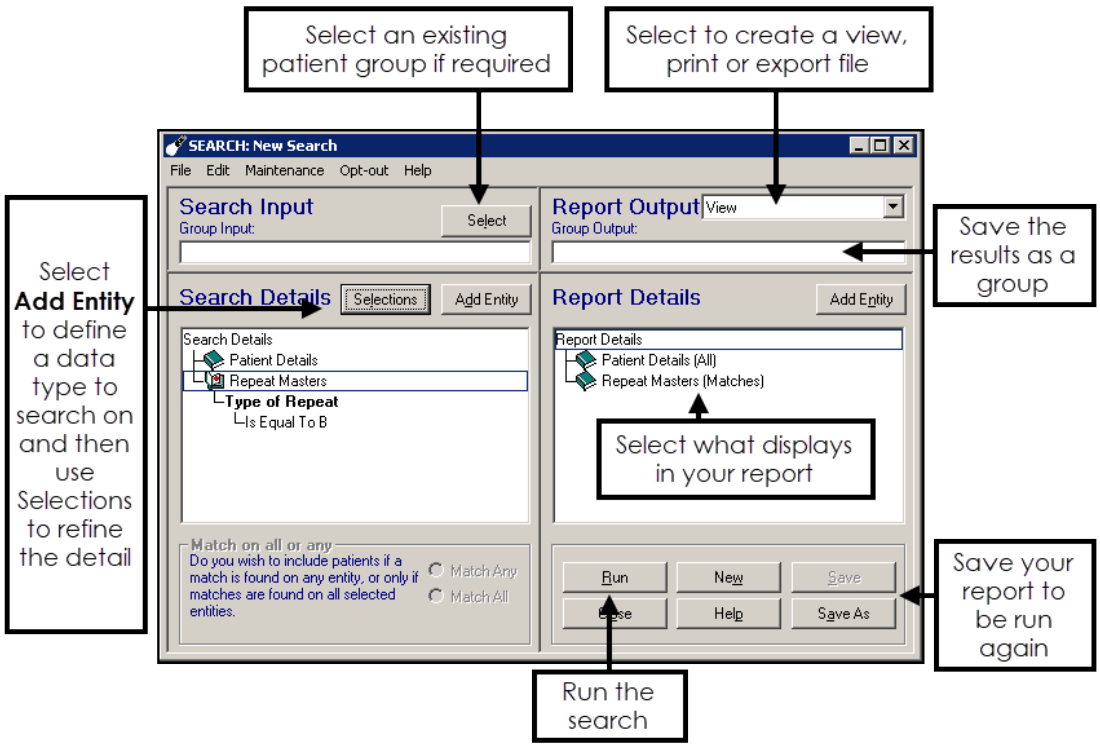
The last run date displays along with the following symbols:

- **Search Details** - select to view the search
- **Patient Group** created- select to view
- **Report printed**
- **Report viewed on screen**

Creating a Search

Important - For practices with a hosted server, for example AEROS, you must watch the videos on your local desktop. To do this copy and paste the url for this web page into your local browser. Local health board restrictions may also affect access.

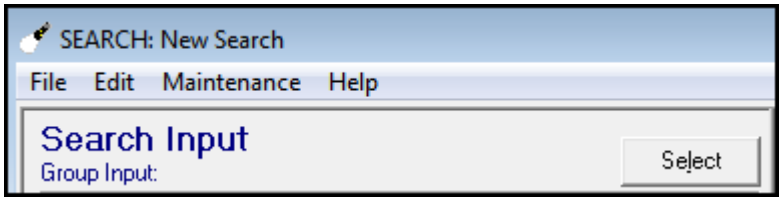
These are the basic steps to creating an ad-hoc search:



1. From **Search and Reports**, select **Ad-hoc search** .
2. The **SEARCH: New Search** screen displays.
3. Optionally, double click in **Group Input** to select a patient group to base the search on, for example, all diabetics. The group can be from Clinical Audit, Patient Groups or created from a previous search.

4. Enter the **Search Details**, for example, permanent and applied patients and Systolic Blood Pressure over 150.
    - **Define patient selection** - Choose to search on all patients or for example, permanent and applied.
    - **Add entity** - Select the data categories you want to search on, for example, blood pressure.
    - **Add further entities as required** - For example, add the weight entity to the blood pressure search to find patients with a high BMI.
    - **Options** - This can be used to define include/exclude patients with certain criteria. For example, exclude patients with a current repeat medication in a specific drug class.
5. Refine the **Report Details**.
    - **Add entity** - This includes additional information on the report, for example, medication.
    - **Matches** - Define whether to look at the latest entry, for example, only the patient's last blood pressure.
6. Optionally, double click in the **Group Output** box to save the results as a patient group.
   This allows you to use the group in a future search or generate letters/recalls.
7. Select from the options in **Report Output**.
8. Select **Run** to generate the search.
9. If required, select **Save** to save the search for future use.

Menu Options



File

- **Save and Save As** - Save the report, or Save As to save under a different name.
- **Report on Last Search** - If you have run a search, and want now to use a different report format, use this option rather than reprocessing the search.
- **Exit** - Return to the **Search and Report** menu without saving any criteria.

Edit

- **Search Details** - The menu options of Add Entity, Remove Entity, Selections, Include/Exclude Options, Show Entity, Show Attribute or Show Criteria.
- **Report Output** - For Summary or Standard report outputs, you can Edit Report Format.
- **Report Details** - Shows the menu options of Add Entity, Remove Entity, or Options.

Remove Entity and **Options** are greyed out unless an entity is selected.

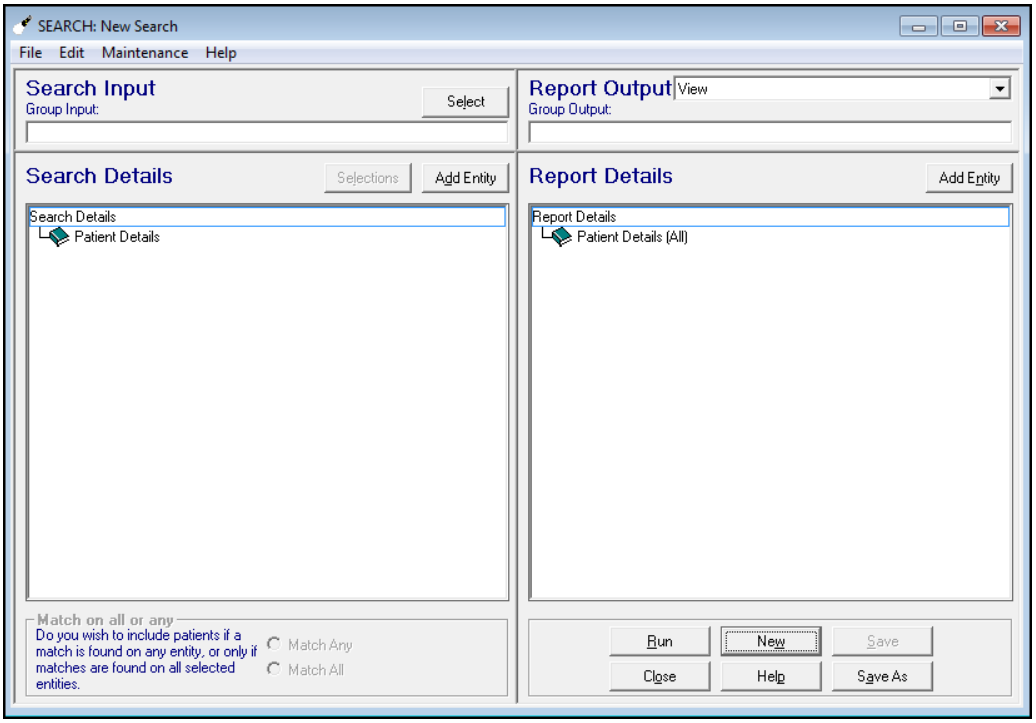
Maintenance

- **Age Bands** - Define the age band groupings.

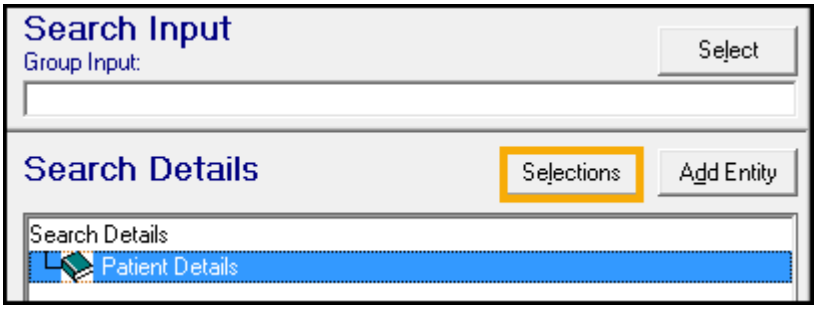
An Example Basic Ad-Hoc Search

This example takes you through creating a search to find permanent and applied patients, with an accidental fall in the last 12 months, you can use this example updated with your criteria to create a basic search:

1. From **Search and Reports**, select **Ad-hoc search** .
2. The **Search: New Search** screen displays:

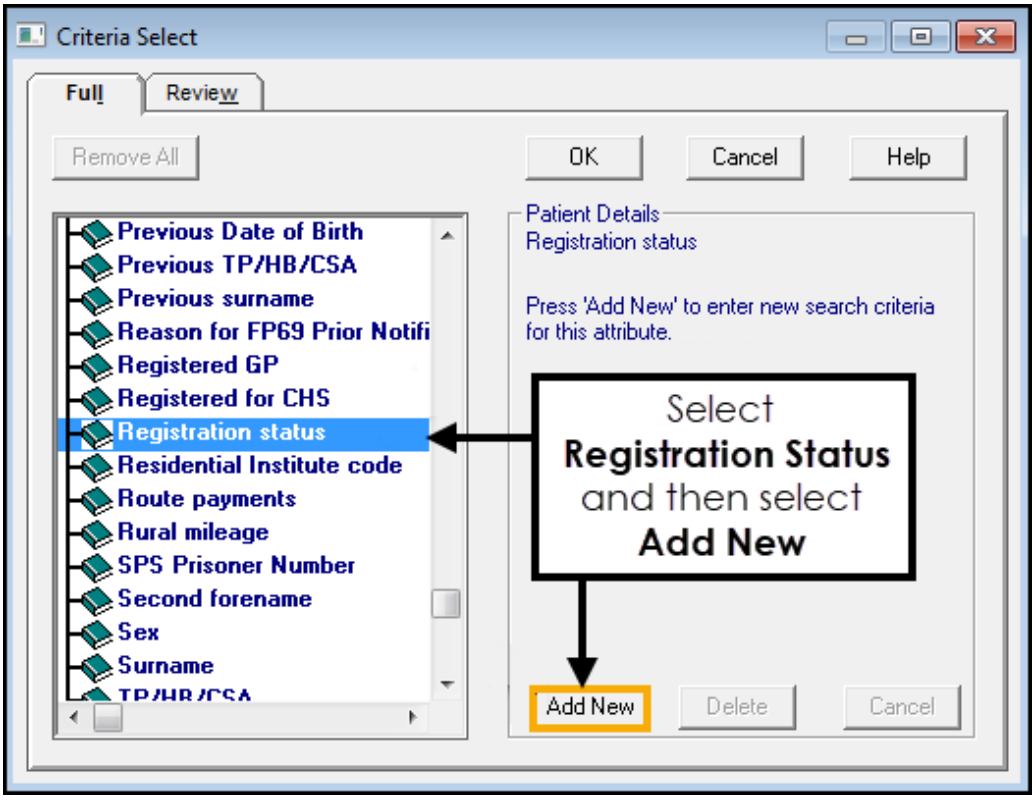


3. Select **Patient Details** under **Search Details:**

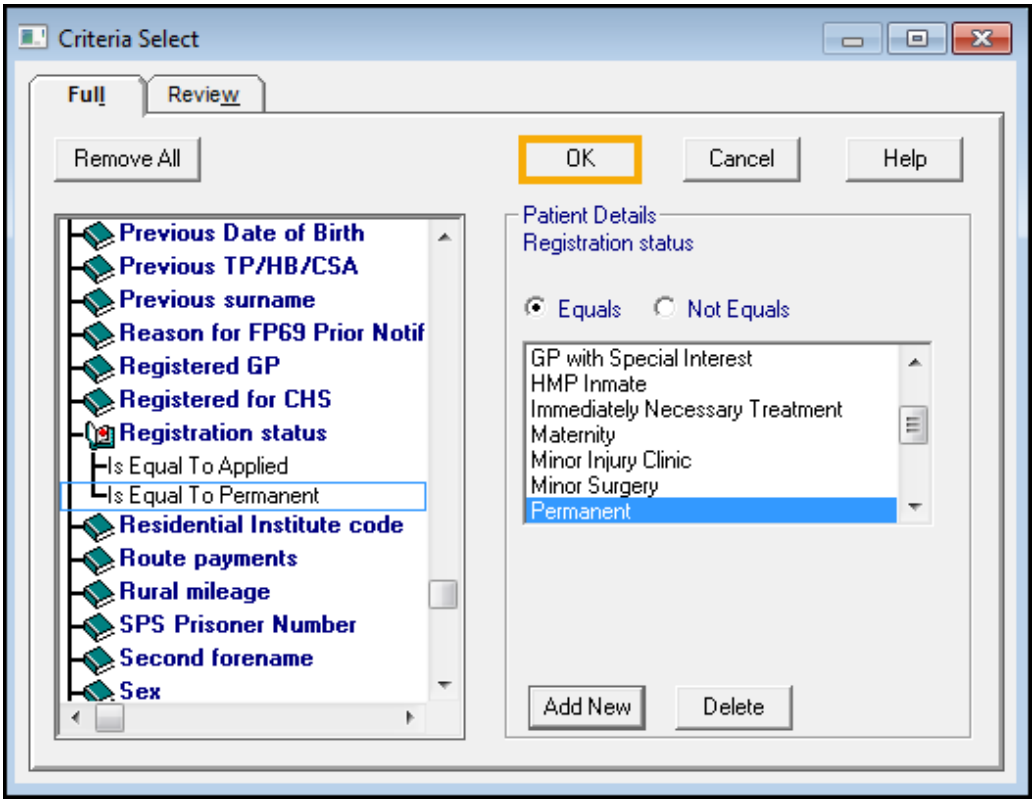


4. Now, select **Selections**.

5. The **Criteria Select** screen displays, allowing you to define your search. For our example, we want to find active patients so we need to scroll down the list to select **Registration Status**:

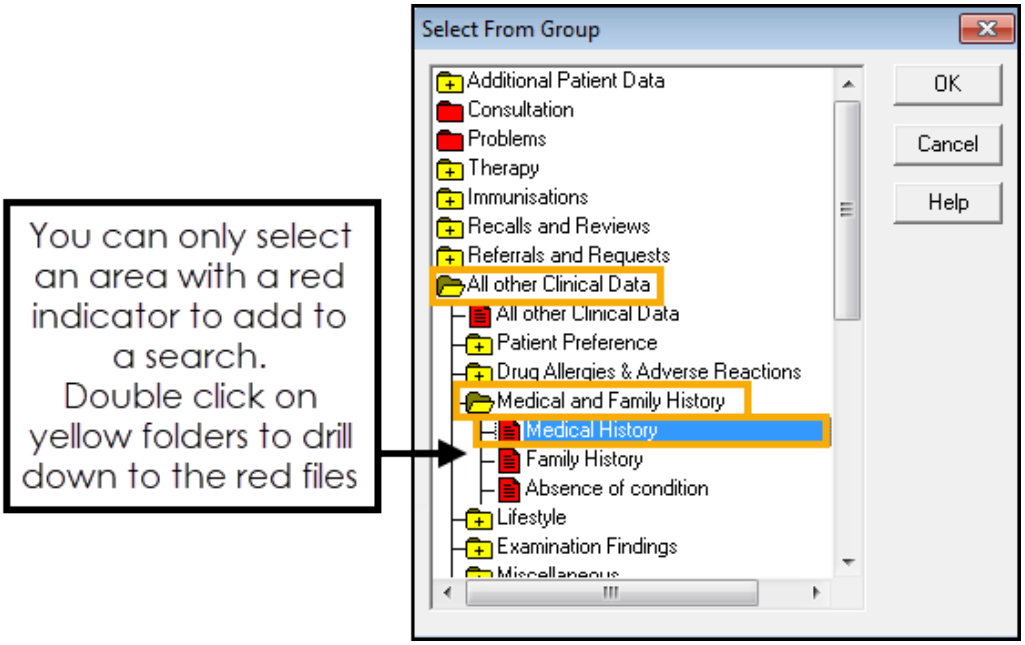


6. Select **Add New**, to choose which registration status to search on.
7. From the list on the right, select **Applied** and then scroll down the list and select **Permanent,** the criteria updates on the left hand side as you add items:

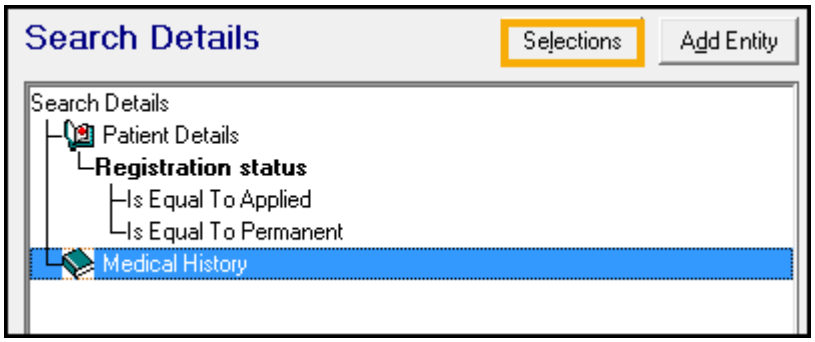


8. Select **OK** and the main search screen updates.
9. Select **Add Entity**

next to **Search Details** and the **Select from Group** screen displays.
10. We are searching for a medical history item, so double click on **All other Clinical Data**, and again on the **Medical and Family History** folder:



11. Highlight **Medical History** and then select **OK**.
12. From **Search Details**, highlight **Medical History** and then select **Selections**.



13. In **Criteria Select**, highlight **Date of Event** and select **Add New**

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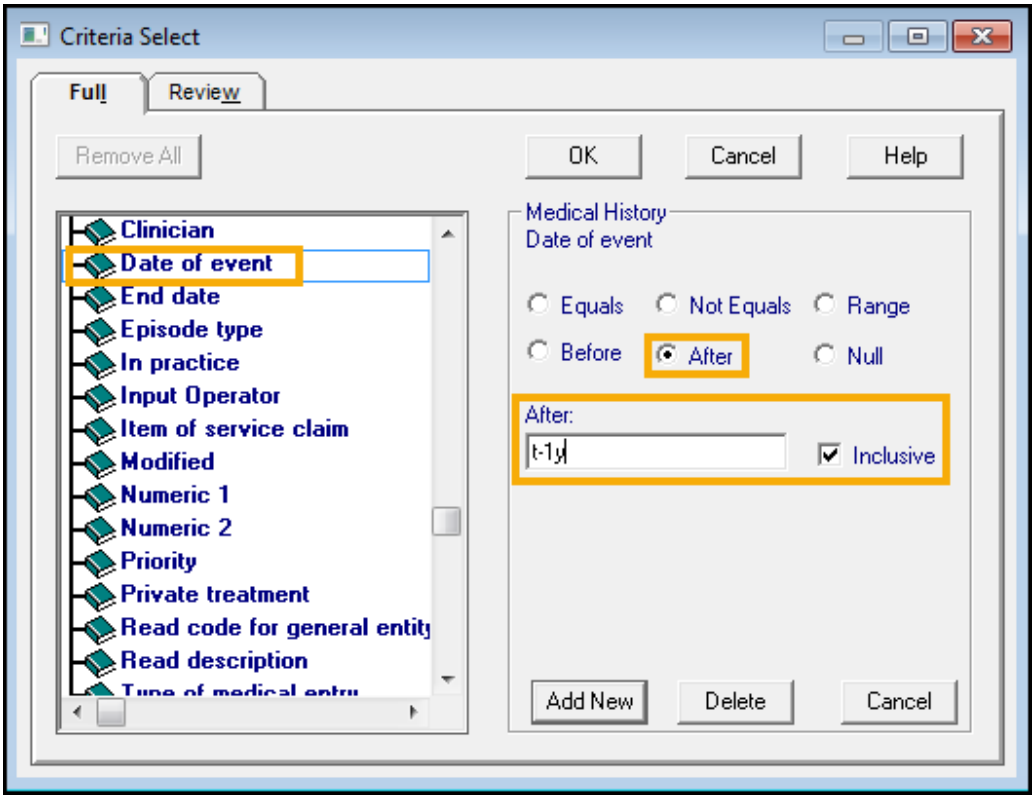
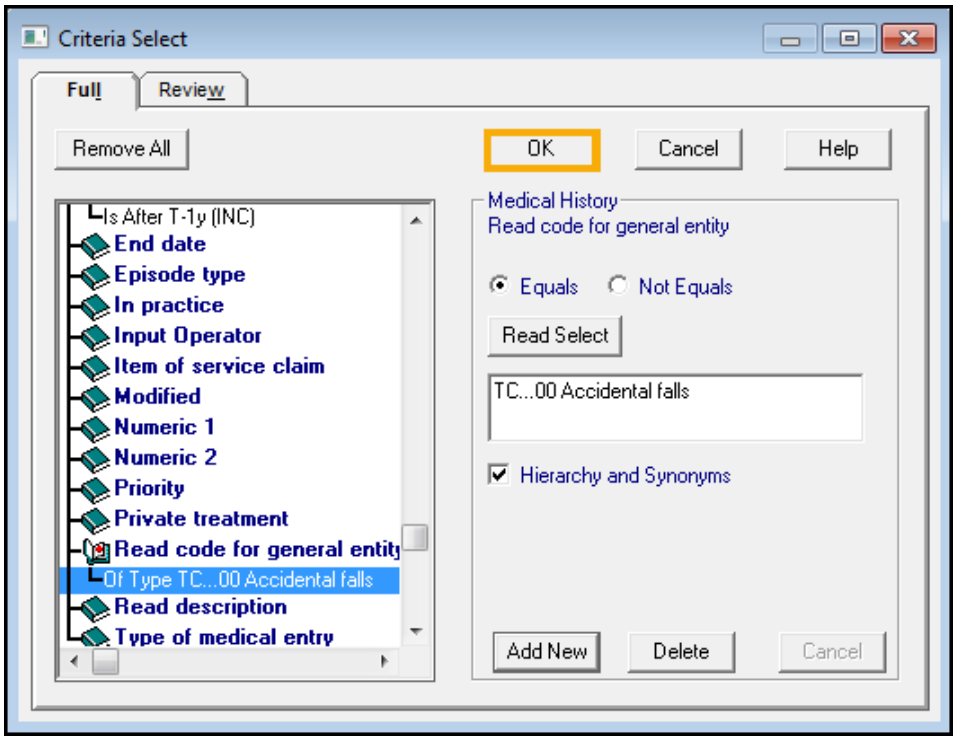
14. We are looking for an event in the last year, so select **After** and enter **T-1y** (Today - 1 year), leave the tick **Inclusive** to include today:



15. Select **Add New**, to add more criteria.
16. Scroll down and highlight **Read code for general entity**, select **Add New**.

17. Either:
    - Type in the clinical code directly, this is case sensitive, in this example **TC**, as we are searching for Accidental Falls, or
    - Select **Read Select** to find the clinical term by either hierarchy or keyword:

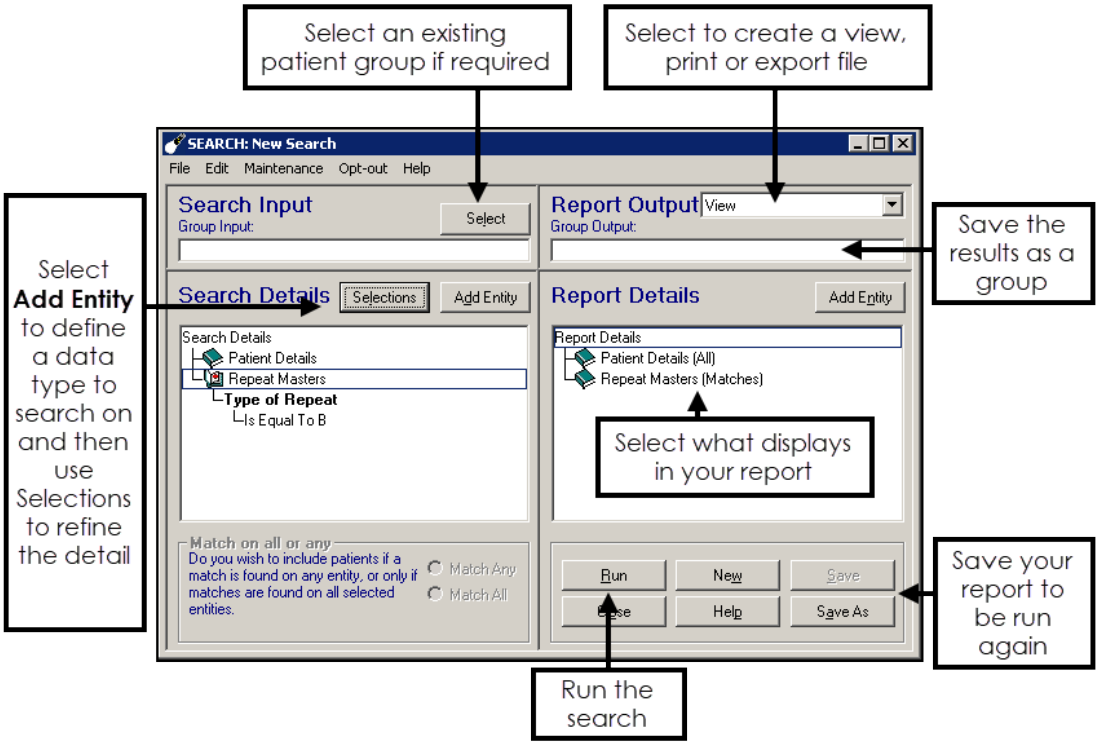


> **Note** - If you leave the **Hierarchy and Synonyms** box ticked the search returns any matches below this entry in the hierarchy.

18. Select **OK** to update the **Search Details**.
19. Select **Run** to generate the report.
20. Optionally, select **Save As** to save the report criteria for future use.

An Example Recall Search

This example takes you through the basic steps to creating an ad-hoc search to look for recalls with a status of outstanding and due within the next month:



1. From **Search and Reports**, select **Ad-hoc search** and the **SEARCH: New Search** screen displays.
2. Optionally, double click in **Group Input** to select a patient group. This bases the search on a group of patients, for example, all diabetics, the group could be from Clinical Audit, Patient Groups or created from a previous search.
   By default this is blank, and uses all patients as the basis for the search.

See Selecting a Group for details.

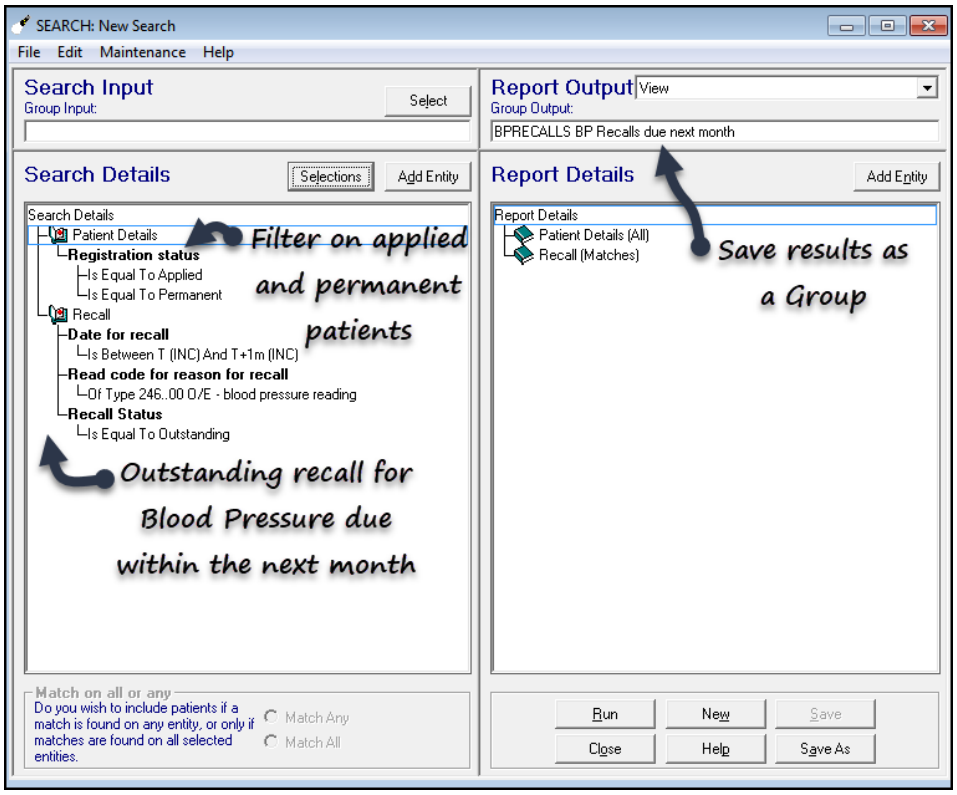
3. Enter the **Search Details**.

- **Patient Details**

  Choose to search on all patients or refine by registration status, for example, permanent and applied.

- **Add entity**

  Select the data categories you want to search on, for example, select the Recalls entity to find patients with an outstanding blood pressure recall due in the next month.



Alternatively, instead of using a date range, use the **Before** option, **Before T+1M** returns both patients with a recall due in the next month and patients with an outstanding recall which is overdue.

- **Add further entities as required**

  For example, add the weight entity to also find patients with a high BMI.

- **Options**
  This can be used to define include / exclude patients with certain criteria. For example, exclude patients with a current repeat medication in a certain drug class.

4. Refine the **Report Details**.
   - **Add entity**
     This includes additional information on the report, for example, medication.
   - **Matches**
     Define whether to look at the latest entry, for example, only the patient's last blood pressure.
5. Optionally, double click in the **Group Output** box to save the results as a patient group.
   This allows you to use the group in a future search or generate letters / recalls.
6. Choose the **Report Output**.
7. Select **Run** to generate the search.
8. If required, select **Save**, to save the search for future use.