

Importing Created Searches in PS Suite

Step 1: From the <u>swpca.ca</u> website, under the EMR Resources tab type in the search indicated and download to your computer.



**Make note of where this file has been saved.

Patients 80 and over - DC.srx

Step 2: In PS Suite, click Records



Step 3: Select "Settings" and then "Edit Searches"



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Edit			
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	Paste	Ctrl+V	
	Duplicate	Ctrl+D	
	Add Search	Ctrl+A	
	Delete Search	Ctrl+Shift+Backspace	
	Remove Lock		
	Test Search	Ctrl+T	
	Edit Report Templates		
	Import Searches		
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	Export All	Ctrl+Shift+S	
	Import Search Collection(s)	Ctrl+Shift+I	
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	6 mths - 3 yrs 6 mths		
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	Asthmatics		
	BAFHT - Inactive Patients		
	Childhood Immunizations 30 m		
	CHRC HF - Lab and HR - Diast	¥	
	Perform Search	Tes	: Search Add Search Done

Step 4: This screen will appear. Select "Edit" then "Import Searches" and "Done"

Step 5: Find the location of the search you downloaded from the swpca.ca EMR Resources. (Note- For this document, the search was saved on the users desktop and is named "Patients 80 and over – DC") Select the search file and click "Choose"



Step 6: Once the search was successfully imported, you will get this notice. Click OK.

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1	Import results: Patients 80 and over - DC.srx	Successfully Imported	

Step 1: In PS Suite, click Records

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Danielle Denomme (JK) - Monday, February 22, 2021			
Logout Appointments Patients Inpatients Clients Bill Book Cash Book Address Bo	ok Handouts	Messages	Records
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Step 2: Select "Settings" and then "Edit Searches"

Danielle Denomme - PSS									
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Step 3: Enter the search name "Patients 80 and over – DC" and select it. Click "Perform search"

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Patients 80 and over - DC	Search Name: Patients 80 and over - DC	0
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Include Matched Data with Result	s			Indu	de Deleted Reco	ords in Evaluation
Report Format						
Title: Patients 80 and over - DC						
Columns: Patient # First Nam	e	Surname	Age	Home Phone	Business P	Mobile Phor
Cancel		Edit S	earches			Search

Step 4: It is defaulted to have all doctors selected. Uncheck any doctors as required. Click "Search"

Step 5: Your report will show up in a new window. To export this to excel select "Report", "Utilities" then "Save to Tab Delimited"

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named it "Patients over 80")

Step 6: Open Excel. In a new workbook select the "Data" tab then select "From Text"

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Find on your computer where you saved the report from step 5, select the report and click "Import"

Step 7: The Import Wizard will appear. Click "Next" twice then click "Finish"



Your report will now be viewable in excel for you to work from.

	A	В	С	D	E	F	G	н	1	J	К	
1	Patient #	First Name	Surname	Age	Home Phone	Business Phone	Mobile Phone	E-Mail Address	Md Name	Primary Provider Name	Privacy	
2	122	Nelson	Muntz	80 yr					James Kavanagh	Dr. James Kavanagh		
3	127	Melissa	Smithers	80 yr	519-236-3743			danielle.denomme@lhins.on.ca	James Kavanagh	Dr. James Kavanagh		
4	137	Dad	Jerrett	80 yr	519-888-5654	519-656-3698	519-636-2589	dadj@yahoo.ca	James Kavanagh			
5	119	Danielle	Denomme	80 yr	519-334-4444		226-336-5638	danielle.denomme@lhins.on.ca	Jennifer Thompson			
6	120	Mickey	Mouse	80 yr			226-236-3743	jennifer.jackson1@lhins.on.ca	Jennifer Thompson	Dr. Jennifer Thompson		
7	103	Grandma	PSS	99 yr	800-265-8175			coolgranny@gmail.com		Dr. Wendi Jerrett		
8												
9												
10												

(No real patient information was used for this document)

Excel Tips:

Adding Filters

1. Once the Column headings are in place, select any cell within your dataset

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Business Phone	Mobile Phone	Email Address	MD Name	Frimary Care Provider
			Phil Dalton	Dr. Phil Dalton
		spacejam@gmail.com	Phil Dalton	Dr. Phil Dalton
	519-123-4558		Phil Dalton	Dr. Phil Dalton
	519-123-4559	mickey@disney.com	Candice Beselaere	Dr. Phil Dalton
	519-123-4560		Candice Beselaere	Dr. Candice Beselaere
			Wendi Jerrett	Dr. Wendi Jerrett

2. On the "Home Tab" click the "Sort and Filter" button, and select Filter

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3. You can now filter your export to list only those patients who have been assigned to a selected physician(s) if required.

Click on the down arrow, then select/unselect the filters, and hit OK

(To revert to the original list of all patients, select the "Select All" option until checkmarks appear in all filter boxes)

