Importing Created Searches in PS Suite

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

| ABOUT THE ALLIANCE | EMR RESOURCES | FOR PROVIDERS | FOR PATIENTS | COVID-19 |

EMR Resources

Welcome to the South West Digital Coalition's Forms Repository. Our aim is to provide Accuro and PS Suite EMR users in the South West an up-to-date library of common referral and requisition forms that meet a minimum standard of quality and functionality.

[COVID-19 Patient Vaccin] [Search]

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

Patients 80 and over - DC.srx

Step 2: In PS Suite, click Records

PS Suite® EMR (Partnering For Quality - 3070)

File Settings Reports Messages MOH Window Help

Danielle Denomme (JK) - Monday, February 22, 2021

Logout Appointments Patients Inpatients Clients Bill Book Cash Book Address Book Handouts Messages Records

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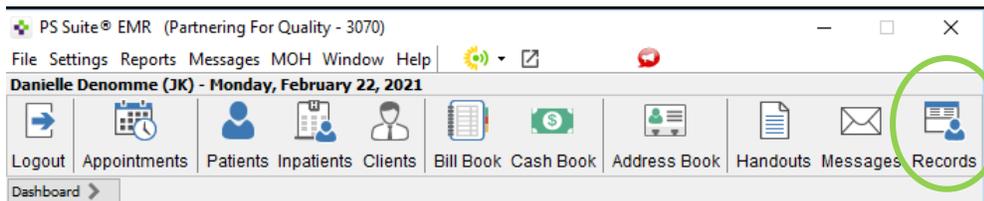
Step 3: Select "Settings" and then "Edit Searches"

Danielle Denomme - PSS

File Edit Styl Settings Patient View Data Letter OLIS

Choose Patient --

Edit Stamps...
Edit Custom Forms...
Edit Searches...
Edit Cohorts...

Edit Reminders...

Edit Reminders of This Patient
New Quick Individual Reminder
New Alert

Increase Text Size   Ctrl+↑
Decrease Text Size   Ctrl+↓
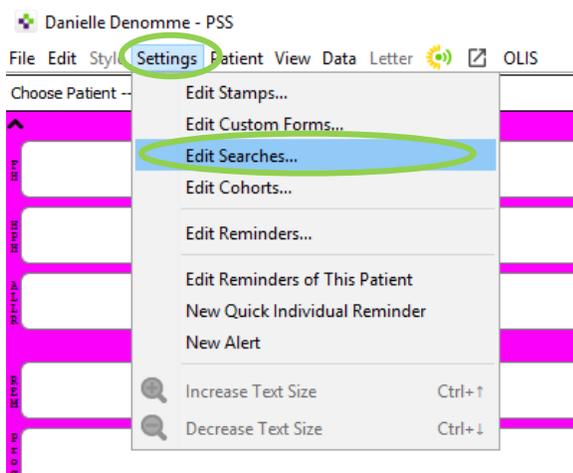
**DISCLAIMER: The PFQ Program has developed this guide/tool for your internal use only. Please follow your clinics policy for privacy and security while running and exporting this created search which will contain personal health information.

Step 4: This screen will appear. Select "Edit" then "Import Searches" and "Done"
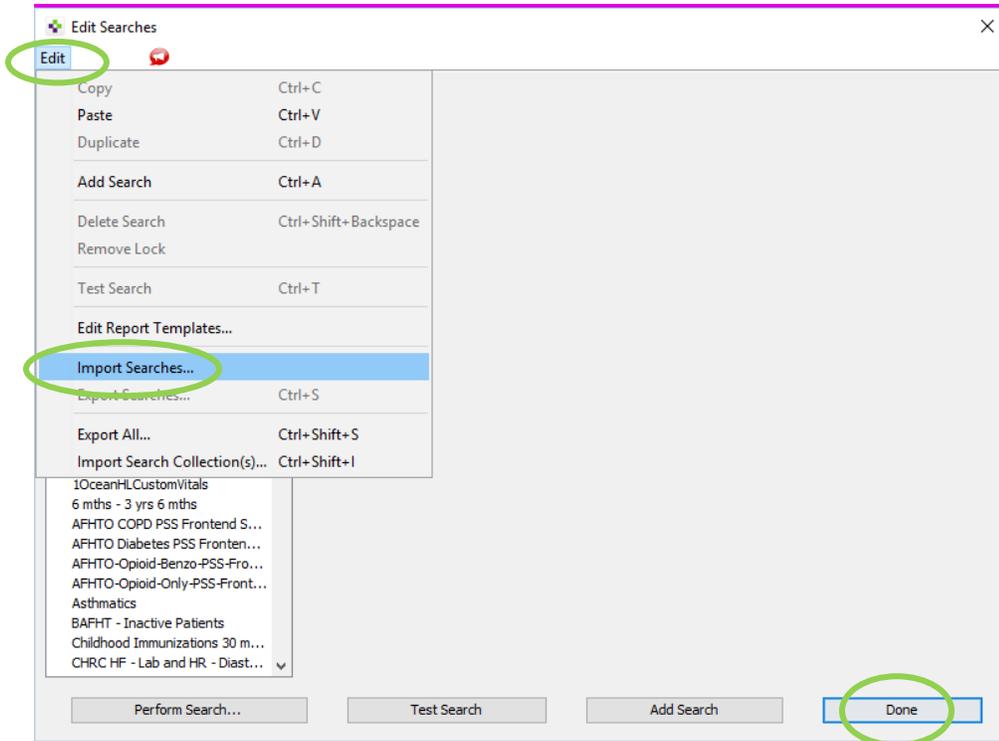
Step 5: Find the location of the search you downloaded from the swpca.ca EMR Resources.
(Note- For this document, the search was saved on the users desktop and is named "Patients 80 and over – DC") Select the search file and click "Choose"
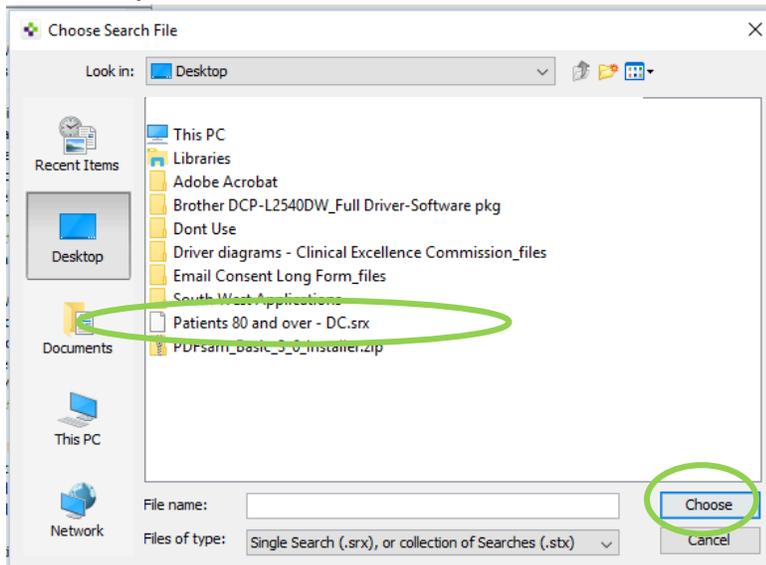
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Step 6: Once the search was successfully imported, you will get this notice. Click OK.
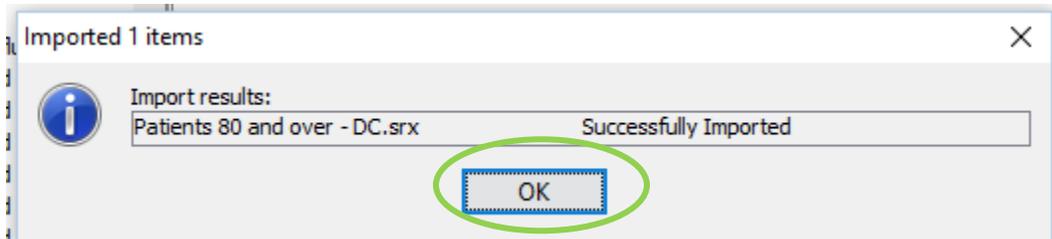
Running a Search and Exporting into an Excel File

Step 1: In PS Suite, click Records
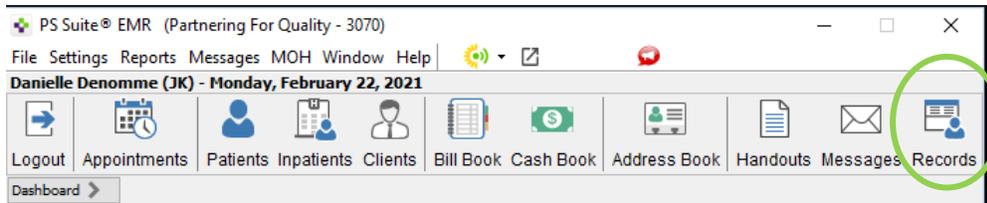
Step 2: Select "Settings" and then "Edit Searches"
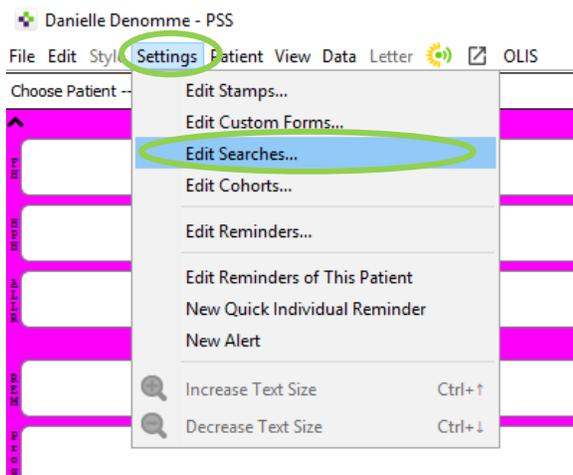
Step 3: Enter the search name "Patients 80 and over – DC" and select it. Click "Perform search"
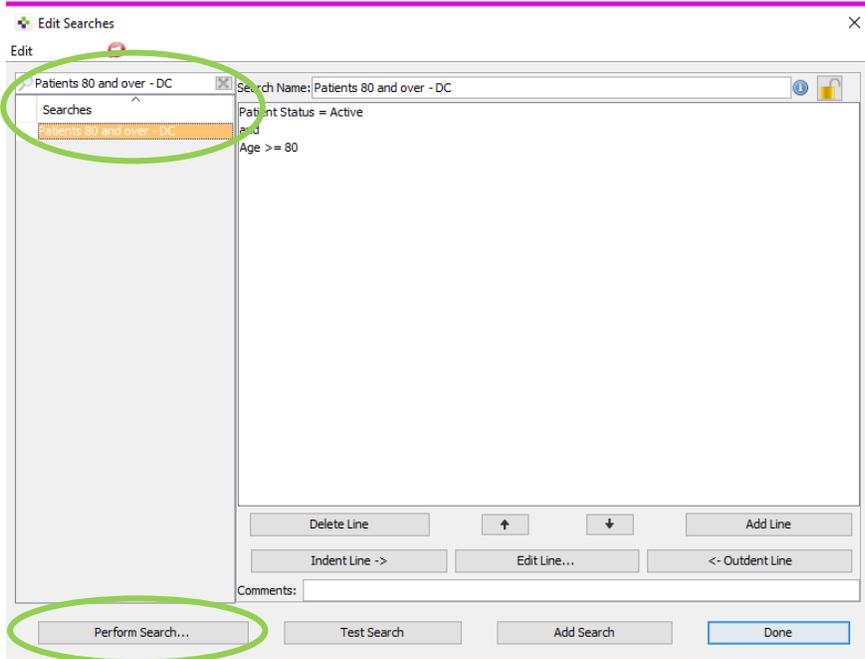
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Step 4: It is defaulted to have all doctors selected. Uncheck any doctors as required. Click "Search"

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

Patients 80 and over - DC

Report

Print...	Ctrl+P
CDS 5: Export	
CIHI: Export	
DIABETES: Export	
CDS: Export	
CIHI: Export	
DIABETES: Export	
Refresh ...	
Find in Report ...	Ctrl+F
Find Again	Ctrl+G
Utilities >	

Save as HTML...
Save as Tab Delimited...
Save as CSV...
Bulk change patient statuses for these patients...
Bulk change MD/NP for these patients...

Print as Patient Labels
Print as Envelope Labels
Print as Name & Number Labels
Print as Wrapping Labels
Print Family Envelope Labels
Print Family Labels

Batch Bill for All Found

Add Problem For All Found
Add Problem For This Patient

Export Patients... >

Form Letter for All Found...
Form Letter for This Patient...

Message for All Found...
Message for This Patient...

Save list as...

Save in:	Desktop

Quick access

OneDrive

Desktop

Denomme, Danielle
Date created: 6/20/2019 9:44 AM

Libraries

This PC

This PC

Libraries

Network

Network

Acrobat Reader DC

Object name:	Patients over 80		Save
Save as type:	All Files (*.*)		Cancel

You must save the file somewhere on your computer then click "Save". (NOTE- For this document, the file was saved to the users desktop and named it "Patients over 80")

Step 6: Open Excel. In a new workbook select the "Data" tab then select "From Text"
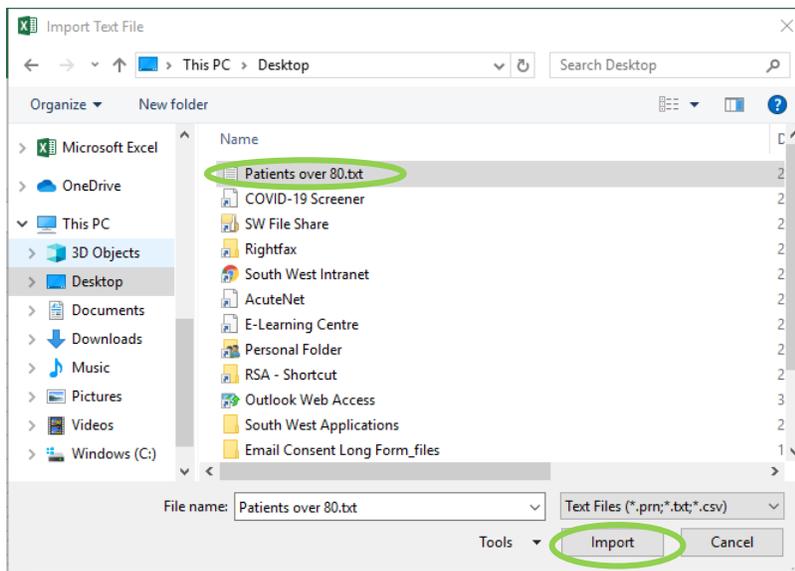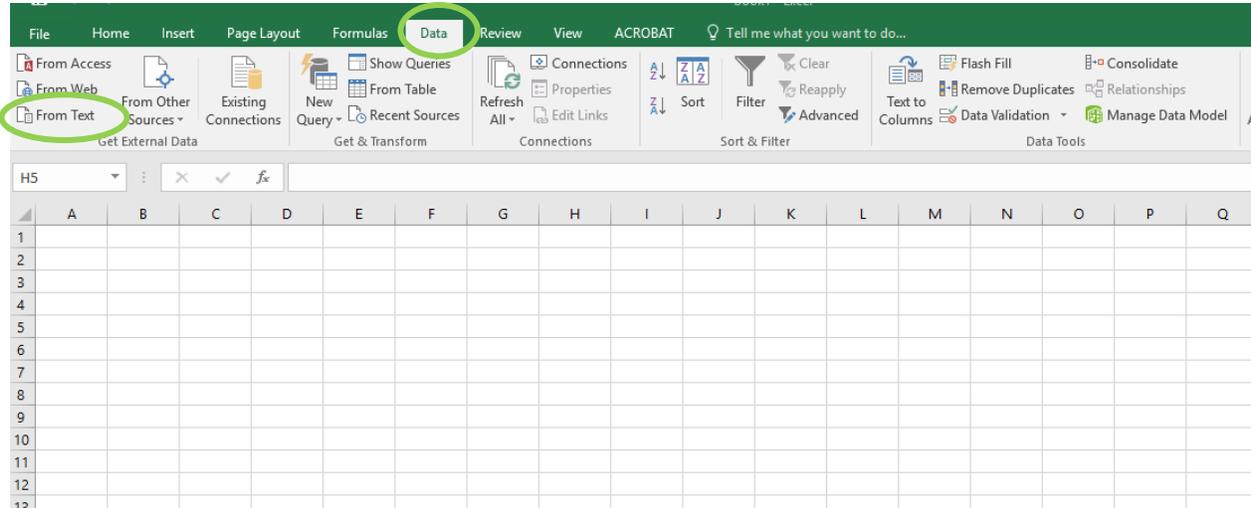
Find on your computer where you saved the report from step 5, select the report and click "Import"

Step 7: The Import Wizard will appear. Click "Next" twice then click "Finish"
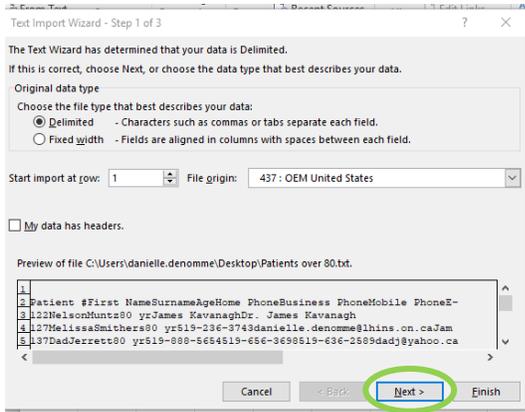
Your report will now be viewable in excel for you to work from.

	A	B	C	D	E	F	G	H	I	J	K
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)

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Excel Tips:

Adding Filters

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

	F	G	H	I	J
	Business Phone	Mobile Phone	Email Address	MD Name	Primary 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
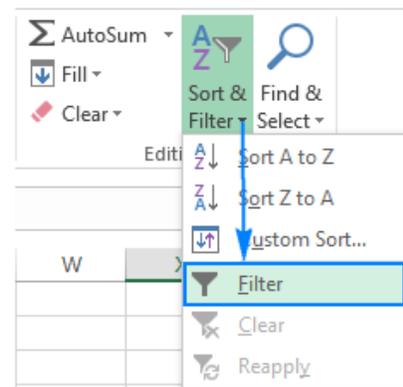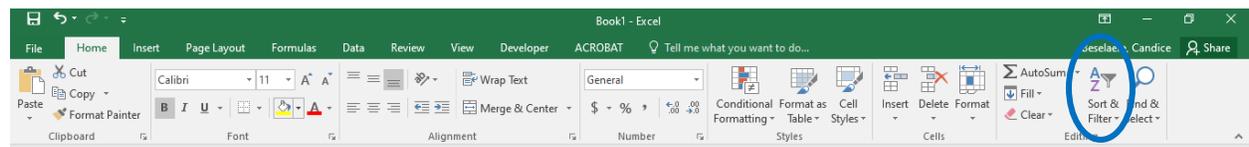
3. You can now filter your export to list only those patients who have been assigned to a selected physician(s) if required.
Click on the down arrow, then select/unselect the filters, and hit OK

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

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