**How to copy & paste searches from Enterprise Search & Reports (ESR) and run searches in EMIS Web**

**EARLY Identification Tool v1.1**

Change log:

V1.1 January 2023 – change log added and footer updated

v1.0 June 2022 Guide created

**How to copy searches from ESR**

In EMIS go to ‘Population Reporting’

At the bottom left of the screen (above QOF) click on the folder (depending on your area) there will be a CCG folder (example as below)



Go into Distributed folder 2020-21

Highlight folder:



Right click on yellow folder icon and select copy

Click back into your own practice folder, right click in the folder you would like to save the searches and paste.

***Please always copy and paste your searches form ESR back into your practice folder in EMIS, do not run within ESR.***

**Running searches in EMIS**

You need to run the searches to obtain the search results. You can run a search immediately after you import.

Navigate to and select the required search you just downloaded. Click on the folder of the search. If you click on the name of the folder this will then run all the searches within the folder

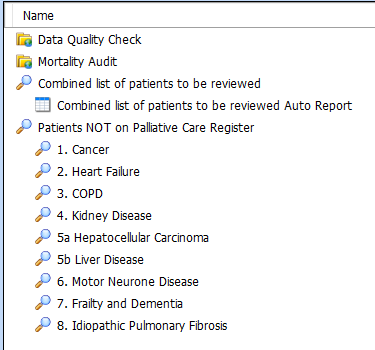


Click **Run** on the blue ribbon at the top of the page



When viewing search results, ensure that the search has been run recently so that you are working with the latest results.

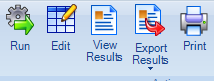
You can view the search results by individual folders or looking at the Combined List of Patients to be reviewed Report



To view click once on the required report



Select **View Results** on the ribbon.



*Note: The Export Results ribbon option is designed for exporting searches. It only allows you to export the report details, not the data. For this reason, you need to view a report before you can export it.*

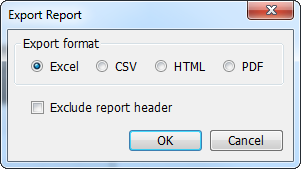
*You can view the report on EMIS, or you can export the results*

On the Report Viewer ribbon, select **Export**.  


On the **Export Report** screen, choose from the following options:

Select a report format:

* + - Excel
    - CSV
    - HTML
    - PDF

Tick the **Exclude report header** option, if you want to exclude the report header.  


Click **OK**to export your report.

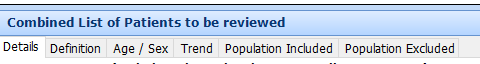
On the **Save As screen**, navigate to the folder you want to save your file in, and then click **Save**.  
The data is saved in your chosen format

**To view a Patient list and not a report:**

Click on **Combined list of patients to be reviewed**



Navigate to the tabs at the bottom and choose population included



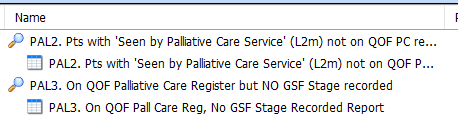
This will give you a list of all the patients from each search

**Data Quality Folder:**

Within the data quality folder there are 2 searches with reports.

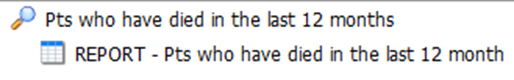
PAL2. This gives you the patients that have been seen by Palliative Care Service in L2m but are not on your QOF Palliative care register

PAL3. This gives you patents on the QOF register but they have no GSF stage recorded

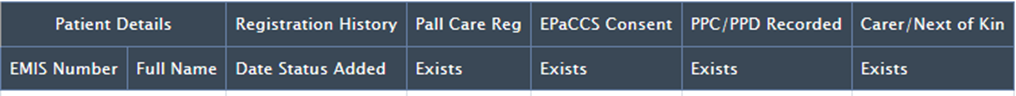


The Data Quality searches are there to help you identify patients that may have miscoding or may have something missing on their record.

**Mortality Audit:**

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This search can help the practice to review those patients who have died over the last 12 months. Viewing the report indicates if they were already on the palliative care register, had an EPaCCS record, their preferred place of care/death recorded and carer/next of kin details.



***Warning: Be aware of Information Governance standards before sharing files.***

*This guide has been written by the Data Quality Team Lancashire to help practices understand the tools created to assist with the EARLY Identification Tool v1.0. If you believe items are inaccurate or something is missing from the content, please contact your data quality contact within your area.*