

FINDING YOUR PKB PATIENTS

1. Log in to Patients Know Best as a **Co-Ordinator**.
2. Go to the **Institution** tab and to **Consent**. Select **Download contact details**.



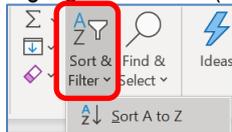
3. Choose to **open** the document.



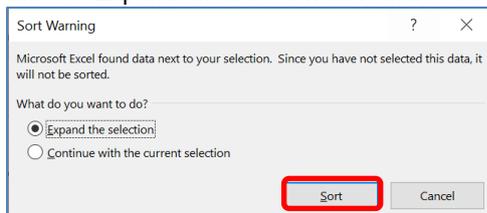
4. Highlight and delete all columns of information, leaving only D & N (National identifier & Primary Email)

D	E	F	G	H	I	J	K	L	M	N
national ic	national ic	organisati	team iden	address1	address2	city	country	primaryEm		
8.63E+09	NHS_NUM	null	null	null	null	null	null	pat_rounc		
9.72E+09	NHS_NUM	null	9 Midland	null	Lin		shir:GB-ENG	pat_beech		
6.04E+09	NHS_NUM	null	null	null	null	null		pat_practi		
7.49E+09	NHS_NUM	null	null	null	null	null		pat_practi		
9.9E+09	NHS_NUM	null	63 Pay Ro	null	Lis		ba GB-ENG	jude.hugh		
6.14E+09	NHS_NUM	null	null	null	null	null		testround		
9E+09	NHS_NUM	null	315 Qehe	null	Dir		nex:GB-ENG	elliott.ro		
9.95E+09	NHS_NUM	null	564 Kur A	null	Pe		GB-ENG	harper.ro		
5.46E+09	NHS_NUM	null	22 Acacia	null	No		gha GB-ENG	patient_n		
9.3E+09	NHS_NUM	null	629 Recuz	null	Nal		iaqu:GB-ENG	thea.smith		

5. N.B to delete the whole columns right click on the header i.e. E
6. Highlight column B (Primary Email) go up to **Sort & Filter** and choose A to Z.



7. Choose Expand the selection and click **Sort**.

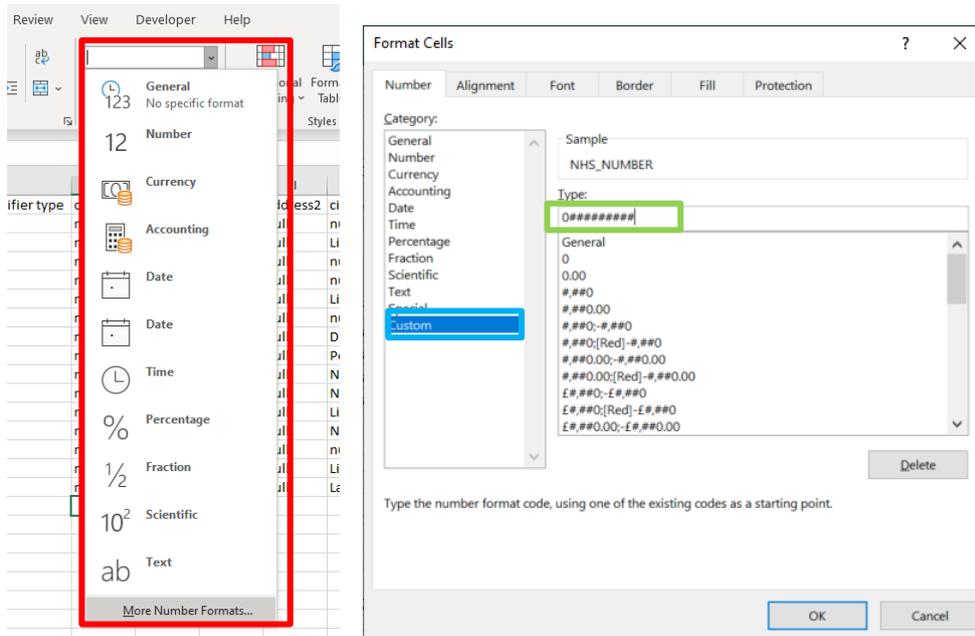


8. Now highlight any rows that have **Null** in column B and **delete** the whole rows.

7	9.09E+09	nottstraining_pat2@pkbtest.com		
8	9.72E+09	Null		
9	7.49E+09	Null		
10	6.04E+09	Null		
11	8.63E+09	Null		
12	5.46E+09	patient_nuh_mtt@pkbtest.com		

9. N.B to delete the whole rows right click on the header i.e. 8
10. Once you have deleted any rows with no email addresses you can delete the email column so that you are only left with the **National Identifier** column.

11. NOTE: If a NHS number Begins with 0 it will remove the zero. To stop this Highlight the Column and click the number format dropdown and select **More Number Formats**. Select **Custom**, and set the **Type** to 0##### (9 #'s) and click ok



12. Save the CSV onto your desktop or shared drive.

ADDING YOUR PKB PATIENTS TO A GROUP

13. Within SystemOne navigate to **Reporting>Miscellaneous Reports>Ad Hoc Patient List**

14. Choose to **Import CSV**

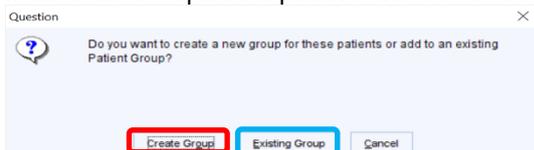


15. Find the CSV file that was saved earlier

16. Highlight all of the patients and choose **Save Group**



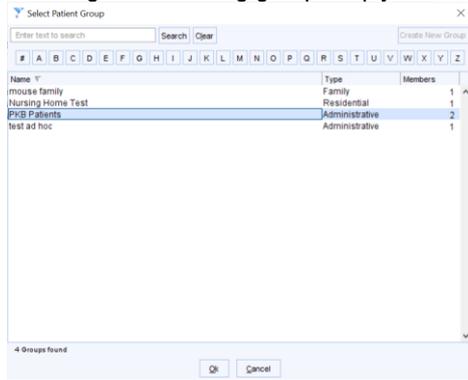
17. If this is the 1st upload of patients choose **Create Group**, otherwise choose **Existing Group**



18. If creating a new group give it an appropriate name and group type



19. If adding to an existing group simply select the group and click Ok



20. Confirmation of patients being added to group, It will automatically discard duplicates.

