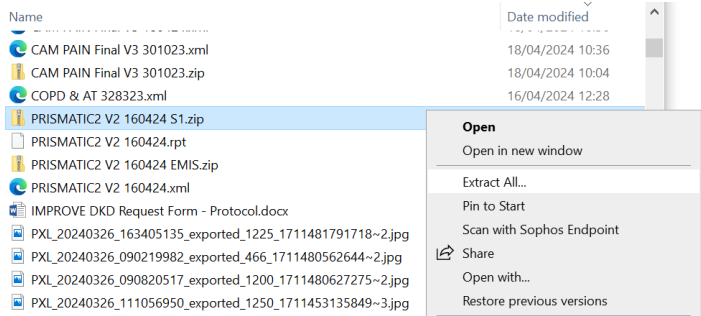
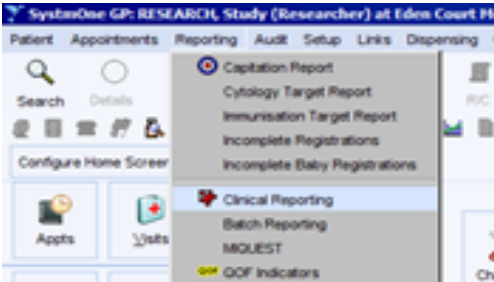
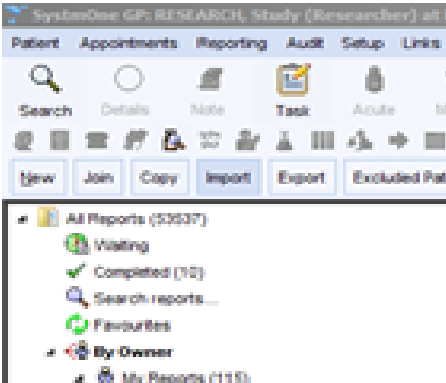
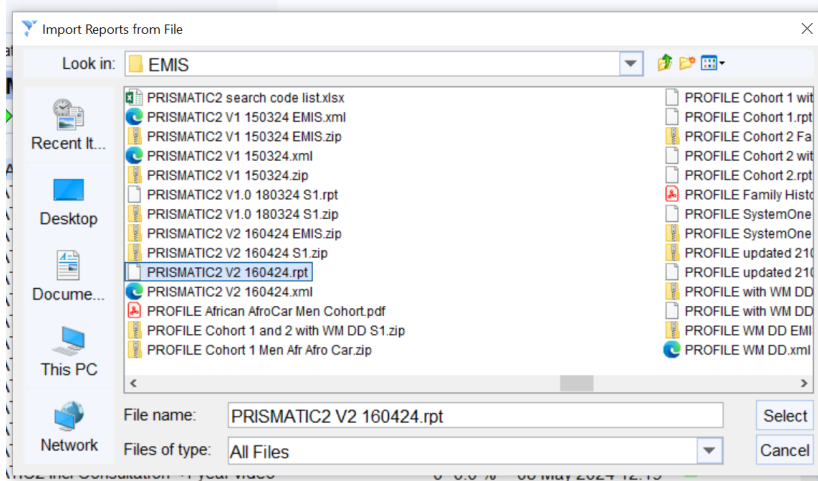
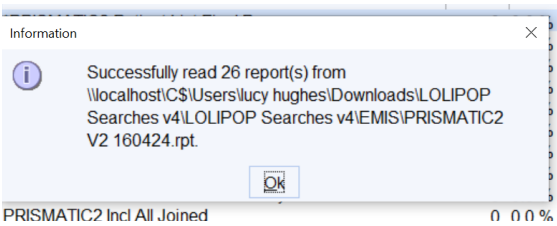
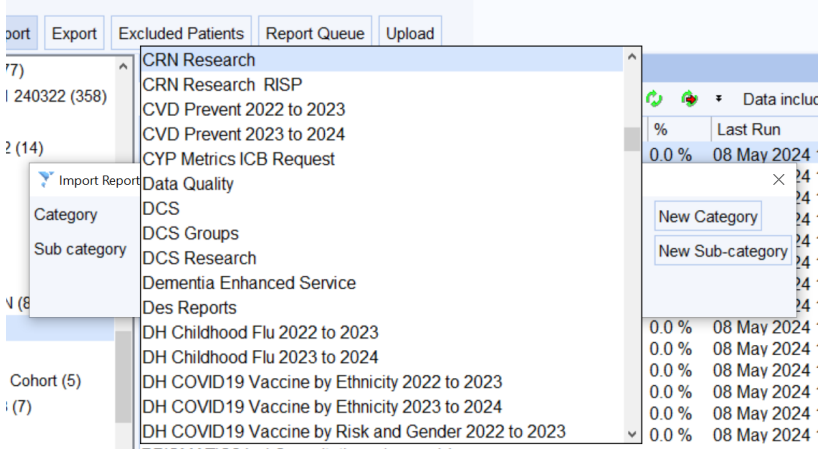
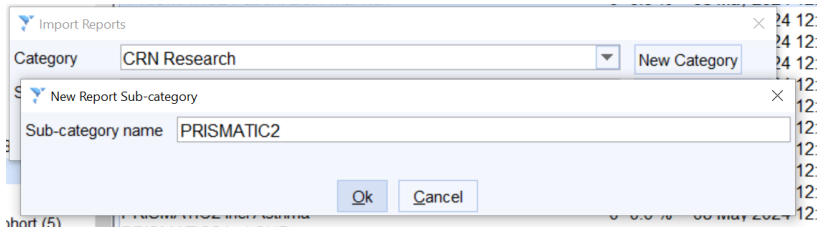
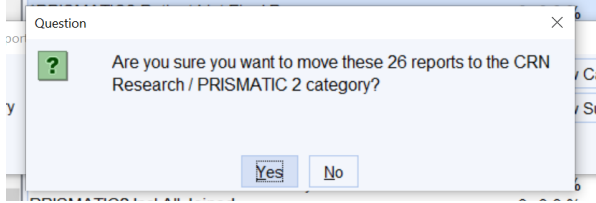


Lead Research Facilitator Contact		
CPMS ID (optional)		
Study Title		RESTORE
Guidance		System One Search, VLookup and Batch Add Instructions
Please note:		
The search looks for any Stroke code / Stroke hospital admission codes in the patient's record between 6 months and 36 months before the search date and does not specify a new diagnosis, if your coding choices at the practice are not in line with this please contact rost.crnwestmidlands@nihr.ac.uk Please note it is important to ensure that the patient has had a stroke in the time period between 6 months and 36 months before the search date and is not being picked up because of a stroke code entered at follow up etc...		
Section 1: Importing the search		
	Action	Screenshot
1a	Download the zipped search file and save to the appropriate study folder on the practice shared drive Right click on the mouse and >Extract All and then save to the same location	
1b	In System One >Reporting > Clinical Reporting	
1c	>Import from the sub-menu	

1d	Choose appropriate search from the saved location, double click on the file or highlight and choose select and > OK	
1e	A message will appear confirming that you the system has read the reports within the import file > OK	
1f	You will be asked where you want to save the search choose the drop menu by 'Category' to find the CRN research folder N.B. If there is no CRN Research folder please create one using the 'New Category' button	
1g	>'New sub-category' and type in the study name then >OK	
1h	You will be asked if you are sure you want to move these files into the folder >Yes	

1i

Please note that the RESTORE search will appear as shown in the right hand pane

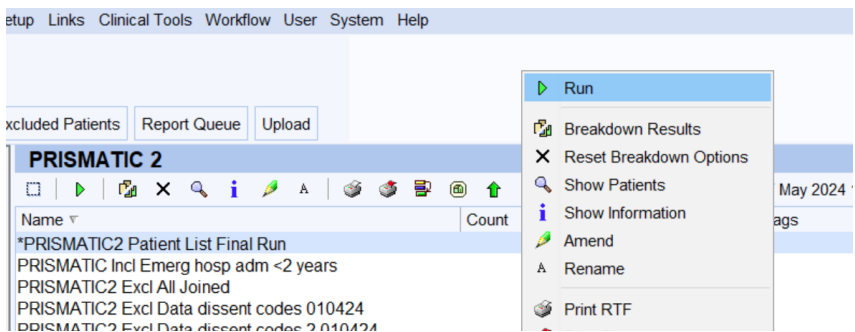
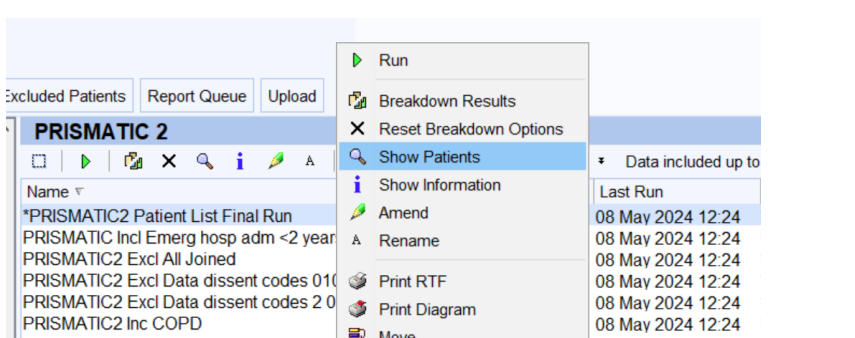
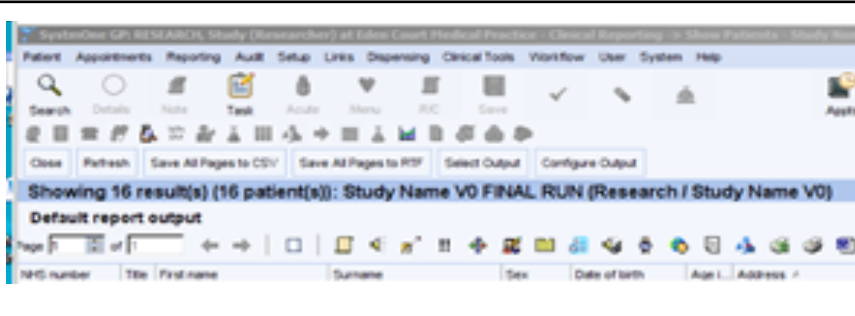
1) The *“RESTORE Final Run for Screening”* will show the potentially eligible patients to be screened

2) The *‘RESTORE Mailing Report’* is included to additionally exclude patients who have opted out of receiving text messages.

If you wish to edit the report output to show the stroke code and date for the patients please see the instructions linked to at the end of this document

Name ▾	Count	%	Last Run
*RESTORE Final Run for Screening	0	0.0 %	05 Jun 2025 13:15
*RESTORE Patient List Final Run SMS specific			
RESTORE All Exclusions	0	0.0 %	05 Jun 2025 10:56
RESTORE All Inclusions	0	0.0 %	05 Jun 2025 13:15
RESTORE Excl Data dissent codes 2 220424	0	0.0 %	05 Jun 2025 10:56
RESTORE Excl Data dissent codes 220424	0	0.0 %	05 Jun 2025 10:56
RESTORE Excl Dementia	0	0.0 %	05 Jun 2025 10:56
RESTORE Excl Institution	0	0.0 %	05 Jun 2025 10:56
RESTORE Excl Palliative Care	0	0.0 %	05 Jun 2025 10:56
RESTORE Excl Previously responded 1/2	0	0.0 %	05 Jun 2025 10:56
RESTORE Excl Previously responded 2/2	0	0.0 %	05 Jun 2025 10:56
RESTORE Excl Severe disability	0	0.0 %	05 Jun 2025 10:56
RESTORE For information Dissent to receive text messages			
RESTORE Incl Age	0	0.0 %	05 Jun 2025 10:56
RESTORE Incl Post stroke	0	0.0 %	05 Jun 2025 13:15

Section 2: Running the search

2a	Select the <i>'*[Study Name] Patient List Final Run'</i> report and right click and >Run (the green play icon)	
2b	Once the reports have run you will see a green tick by this and the run date and time will be shown to the right of the screen. Right click on the report and > 'Show Patients'	
2c	The eligible patient list will appear, then >'Save all pages to CSV' and choose the appropriate study folder on the shared drive. Save the file as excel and name as appropriate e.g. '[Study Name][Date] Patient List for Screening'	

Section 3: GP Screening

3a Once the GP has signed off the screening list open the excel Patient List for Screening and colour fill the patient rows which the GP wishes to exclude

J	A	B	C	D	E	F	G
1	NHS Number	Forename	Surname	Number and Street	Town	County	Postcode
2	123 937 3931	Fred	Blagge	1 Main Road	Birmingham	West Midlands	B12 9PT
3	123 123 1392	John	Doe	2 Main Road	Birmingham	West Midlands	B12 9PT
4	876 129 1873	Muriel	Bends	3 Main Road	Birmingham	West Midlands	B12 9PT
5	135 338 2999	Greg	Michaels	4 Main Road	Birmingham	West Midlands	B12 9PT
6	123 258 3288	Jimmy	Hicket	5 Main Road	Birmingham	West Midlands	B12 9PT
7	475 354 1934	David	Summers	6 Main Road	Birmingham	West Midlands	B12 9PT
8	126 349 1093	Nigel	Ordon	7 Main Road	Birmingham	West Midlands	B12 9PT
9	125 354 6193	Envy	Mun	8 Main Road	Birmingham	West Midlands	B12 9PT
10	132 957 5843	Philip	Strick	9 Main Road	Birmingham	West Midlands	B12 9PT
11	136 354 6913	Ferdinand	Clock	10 Main Road	Birmingham	West Midlands	B12 9PT
12	123 777 6476	Graham	Alabaster	11 Main Road	Birmingham	West Midlands	B12 9PT
13	417 947 1889	Alfred	Bones	12 Main Road	Birmingham	West Midlands	B12 9PT
14	143 881 8141	Robin	Hood	13 Main Road	Birmingham	West Midlands	B12 9PT
15	191 911 1937	Samuel	Priggs	14 Main Road	Birmingham	West Midlands	B12 9PT
16	135 357 1043	Joseph	Names	15 Main Road	Birmingham	West Midlands	B12 9PT
17							

Section 4: Creating a Mailing List

*If the mailout is taking place the same day as the search, skip to step 4d

4a Rerun the search as shown in 2a to 2c and save the rerun search in the second tab named of the spreadsheet and name appropriately e.g. D&D Check and the date run

4b In your original screening list create a new column called 'D&D Check', in the first cell of the column insert your formula as below and then press enter

*Remember to put comma between each step

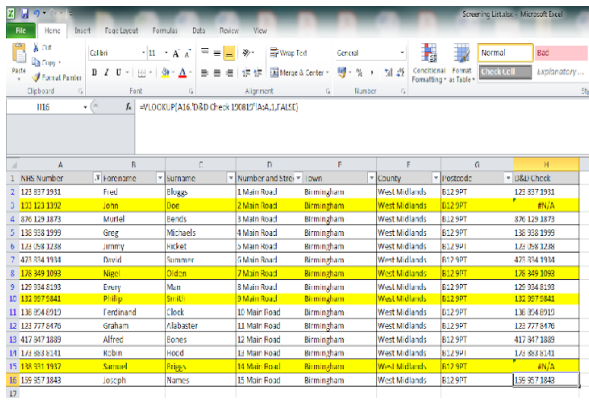
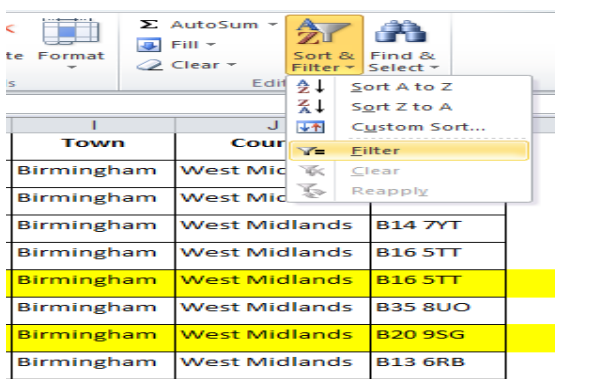
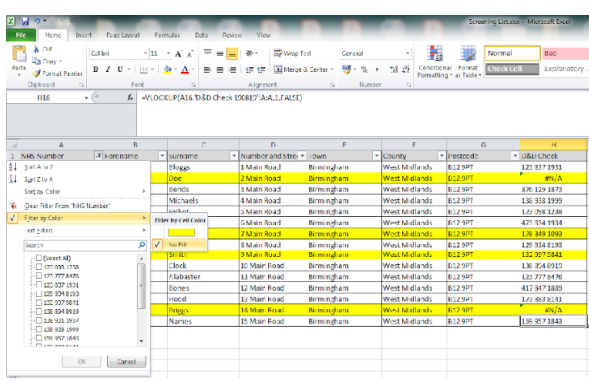
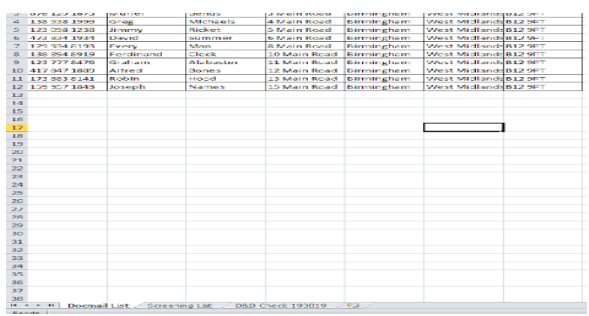
=vlookup(A2,'D&D Check 190819'!A:A,1,FALSE)

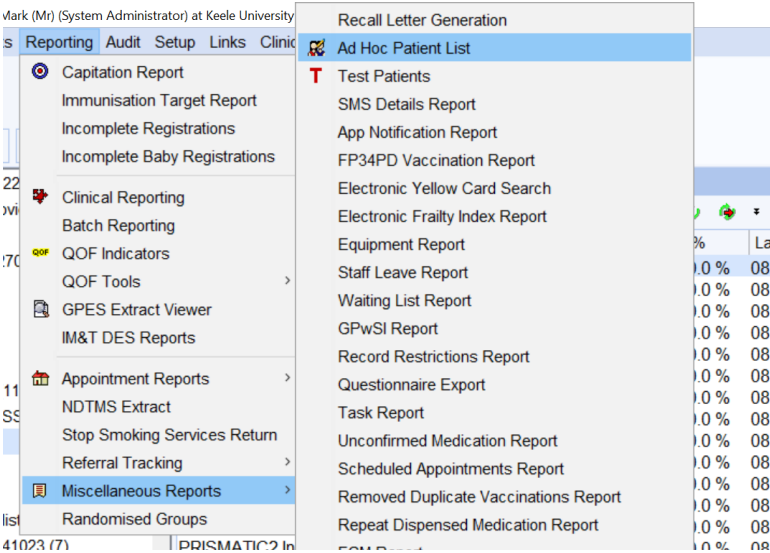
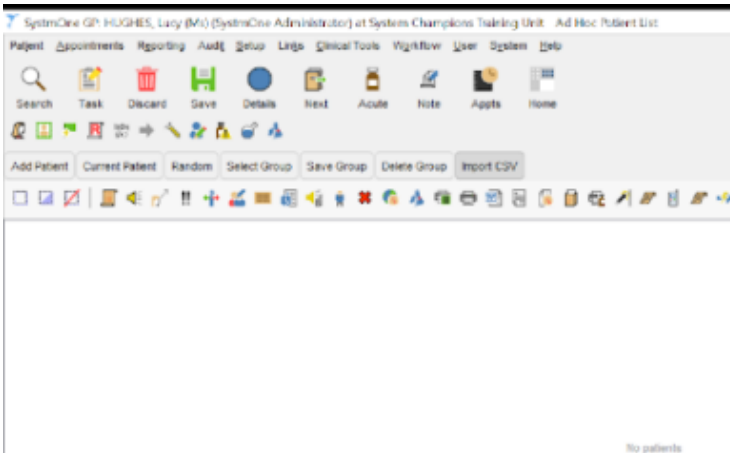
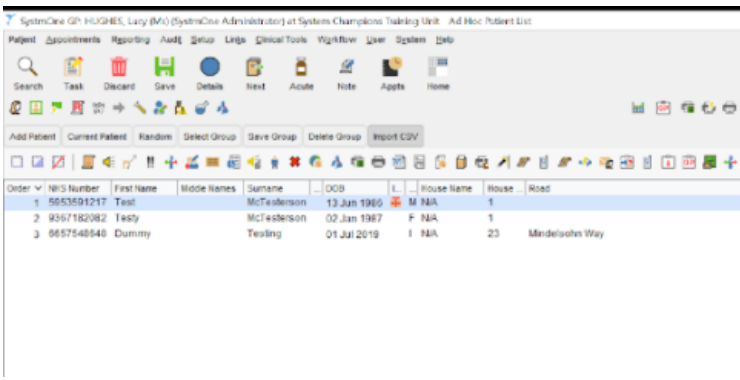
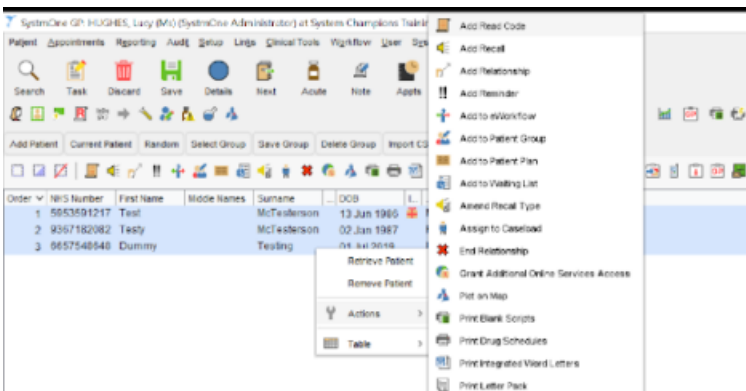
Choose the NHS number in the same row to choose the value to look up

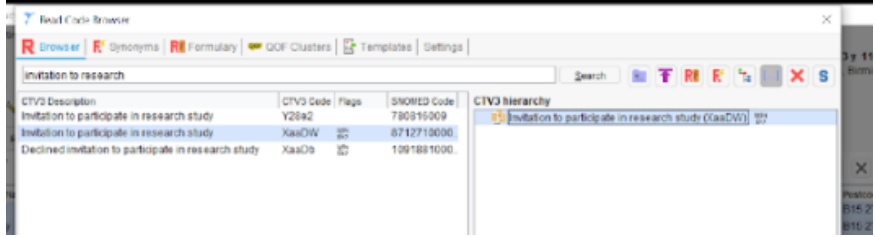
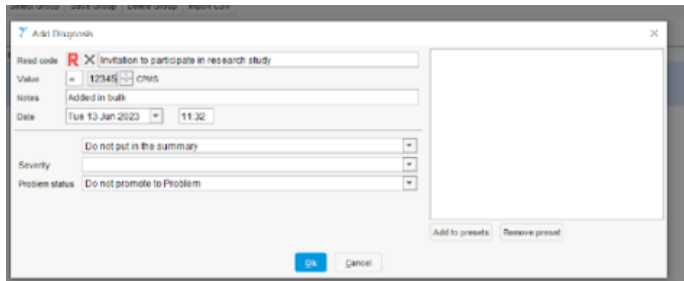
Choose the entire column of NHS numbers in the second tab 'D&D Check' to specify where to look for the value

Type 1 to specify that the vlookup should return the value in first column

Type FALSE to specify exact matches only

4c	Drag the formula down to populate all rows and colour fill any patient rows which show 'N/A' in the D&D check column.																									
4d	Click on 'Sort & Filter' > 'Filter'	 <table border="1"> <thead> <tr> <th>Town</th><th>County</th><th></th></tr> </thead> <tbody> <tr><td>Birmingham</td><td>West Midlands</td><td></td></tr> <tr><td>Birmingham</td><td>West Midlands</td><td></td></tr> <tr><td>Birmingham</td><td>West Midlands</td><td>B14 7YT</td></tr> <tr><td>Birmingham</td><td>West Midlands</td><td>B16 5TT</td></tr> <tr><td>Birmingham</td><td>West Midlands</td><td>B35 8UO</td></tr> <tr><td>Birmingham</td><td>West Midlands</td><td>B20 9SG</td></tr> <tr><td>Birmingham</td><td>West Midlands</td><td>B13 6RB</td></tr> </tbody> </table>	Town	County		Birmingham	West Midlands		Birmingham	West Midlands		Birmingham	West Midlands	B14 7YT	Birmingham	West Midlands	B16 5TT	Birmingham	West Midlands	B35 8UO	Birmingham	West Midlands	B20 9SG	Birmingham	West Midlands	B13 6RB
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Birmingham	West Midlands	B35 8UO																								
Birmingham	West Midlands	B20 9SG																								
Birmingham	West Midlands	B13 6RB																								
4e	Choose cell A1 and click on the downward arrowhead >Filter by Colour >Filter by Cell Colour >No Fill >OK																									
4f	With the filter active, copy and paste the patient list into a new tab at the front of the spreadsheet named and name as appropriate e.g. '[Study Name] [Date] Final Patient List for Docmail'. You now have your final list of patients to invite.																									
Section 6: Batch Adding Invited Code																										
6a	Copy and paste the NHS numbers from the Final Patient List for Docmail and save in .csv file and name this as appropriate e.g. 'Final Patient List for Docmail NHS numbers'																									

6b	In Systmone, go to Reporting > Miscellaneous Reports > Ad Hoc Patient List. There should be a blank screen at this stage and no patient names listed. Stop if this is not the case	
6c	Assuming the screen is blank, click on import CSV and select the 'Final Patient List for docmail list NHS Numbers'	
6d	All the patient details will now appear in the list In the bottom left corner of the screen check that the number of patients shown matches the number invited for the study – Stop if this is not the case	
6e	Ctrl + a to select all the patients in the list and then > Actions > Add Read Code	

6f	Search for and select the invitation to participate in a research study > OK	
6g	In the value box use the drop down to select the wavy equals sign and then input the CPMS ID and under Notes add: Invited to Study Name > OK	
6h	Remove all patients from the Ad Hoc patient list. With all patients still highlighted, right click the mouse on one patient and choose Remove Patient. All patients will be removed from the list	
N.B	Amending the SystmOne Report Output If you wish to amend the default report to add the stroke code and date to aid screening please follow the instructions linked to in the right hand pane.	Appendix 1 SystmOne Editing reports
Any problems or questions please contact rost.crnwestmidlands@nihr.ac.uk		