

# REPORTS USER GUIDE

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## List of Reports Available on NACR:

**NB:** The new message in the grey box - this is mainly going to be relevant if you use the Extracts or Follow up Due report, as these contain patient identifiable data. The All Patient View / Missing Key Fields Views are not downloaded, instead just visible on the screen; the other reports contain only summary information, not data on individual patients. Data containing patient identifiers needs to be stored securely, according to your Trust Information Governance guidelines.

Please be aware that what you are downloading may contain person identifiable data. This download will save into your 'Downloads' folder on your local machine and you should therefore consider if this is a secure location or if you should save this download elsewhere.

Please consider your local security, encryption and Information Governance processes and controls when choosing a location to save this download.

### Reporting

- > Extract
- > All Patient View
- > Missing Key Fields View
- > Follow Up Due Report
- > Data Entered Report
- > Demographics Report
- > Reason For Referral Report
- > Rehab Summary Report
- > Referral To Start Summary Report
- > Reason For Not Taking Part Report
- > Reason For Not Completing Report
- > Outcomes Report
- > Assessment Breakdown Summary Report
- > Duration Summary Report

## Selecting the date range:

**NB:** Throughout the reports section of the database, you can hover over the blue 'i' icons next to the date fields to find out which date in the database is used to filter the report data, as different reports use different fields depending on the information displayed:



The image shows two date input fields. The first field contains '01/04/2015' and has a blue information icon (i) to its right, which is circled in red. The second field contains '18/11/2015' and also has a blue information icon (i) to its right.

## EXTRACT:

How to use the extracts is covered later in this guide, from page [11](#)

## ALL PATIENT VIEW:

### Search for Patient Record

Date Of Birth  Gender   
Forename  Surname

NHS Number	DoB	Forename	Surname	Gender	Date of Death
<a href="#">111111111</a>	11/11/1980	John	Willis	Male	
<a href="#">3338885458</a>	01/04/1988	TESSA	TESTY	Male	
<a href="#">4000576704</a>	22/03/1970	ANTONIA	BAKERSFIELD	Female	
<a href="#">4222409758</a>	10/06/1921	ARTHUR	PIKE	Male	
<a href="#">4264443792</a>	12/08/1941	JAMES	PARKINSON	Male	
<a href="#">4268597271</a>	30/06/1948	FRUMA	KNIGHT	Female	

<< Previous [1](#) ... [892](#) ... [893](#) ... [894](#) ... [895](#) ... [896](#) ... [89](#) Next >>

This is an alternative way to search for patients, rather than using the 'NHS Number / DOB' method that is the default on the 'Add/Search for Patient Record' screen. This is useful if you don't have the NHS number / DOB to hand as it uses the patient name. Click on the NHS number in the list and it will take you through to the patient's Record Tree.

## MISSING KEY FIELDS VIEW:

### Missing Key Fields

> Patient

> Initiating Event

> Rehabilitation

> Assessment

Covers the 4 record types, and shows a selection of specific fields not completed for a patient. The date selection is around 'date created'. Click on 'Edit Record' to be taken to the correct record to amend.

The **Rehabilitation View** has been updated (Sept 2018) to give better guidance around fields required for both the NACR Annual Report and the NCP\_CR Certification. We are looking to update the others in due course.

#### Patient View:

NHS Number	DOB	Surname		Gender	Marital Status	Ethnic Group
9768314575	01/01/1950		Edit Record	✘	✘	✘

#### Initiating Event View:

NHS Number	DOB	Surname		Treatment associated with IE (before rehab)	Previous events	Comorbidity	Discharge date
9768314575	01/01/1950		Edit Record	✘	✘	✘	✘

#### Rehabilitation View:

NHS Number	DOB	Surname		Date Referred	Phase 3 / Core Start Date	Phase 3 Completed / Core End Date	Reason For Not Taking Part	Reason For Not Completing	Rehab Delivery	Number of Sessions
9604964011	01/05/1953	Austen	Edit Record			✘		✘	✘	✘
8889812869	08/04/1965	Brown	Edit Record			✘		✘		
8844411474	23/06/1936	Donnelly	Edit Record	✘					✘	✘

#### Assessment View:

NHS Number	DOB	Surname	As No		Smoking	Exercise	QOL	HAD	Drugs	Core components
8875684863	09/08/1945	Baker	1	Edit Record	✘	✘			✘	✘
8889084227	05/09/1945	Davies	1	Edit Record	✘	✘			✘	✘
8827067248	01/05/1965	Dunn	1	Edit Record	✘	✘	✘	✘		✘

## **FOLLOW UP DUE REPORT:**

This report can be used to show which of your patients are due to be sent out their Ass 2 or Ass 3 questionnaires. It will return those patients that your programme created the Ass 1 record for, where they don't already have an Ass 2/Ass 3 created. The 'due' date works on:

Ass 2 – 12 weeks from the Ass 1 date

Ass 3 – 12 months from the Ass 1 date

## **Follow Up Due Report**

---

Assessment Number:

Month:

You would select the Assessment number you're wanting to run the report for (Ass 2 or 3), and the month you wish to run it for – this drop down will show the current month, the next 2 months, and 'outstanding' for all others.

This report will download into an Excel file:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
AssessmentID	InitiatingEventID	Identifier	Zone	DateOfBirth	Surname	Forename	AddressLine1	AddressLine2	AddressLine3	Postcode	IEEventTypes	InitiatingEventDate	AssessmentDate	
2559	1085	8893609592	NHS Number	01/01/1965 00:00	Hanley	Herbie	"1 Maynard Close"	"Whittington Rise"	"Manchester"	M12 5FR	MI with Heart Failure	03/01/2016 00:00	10/03/2016 00:00	
2560	1087	8809125509	NHS Number	20/01/1956 00:00	Rascoe	Sharon	"Red House"	"Little Wratting"	"Haverhill"	CB9 4DF	MI (Unknown)	01/02/2016 00:00	15/03/2016 00:00	
2561	1088	8841760176	NHS Number	10/03/1967 00:00	Fragoso	James	"1 Market Close"	"Wythenshawe"	"Manchester"	M10 4RD	MI (Unknown)	02/02/2016 00:00	16/03/2016 00:00	
2562	1089	8873563074	NHS Number	01/02/1949 00:00	Coffelt	Vivien	"Flat 2, Forest Croft"	"Forest Hill"	"London"	SE23 2TF	Use Treatment	03/02/2016 00:00	17/03/2016 00:00	
2563	1090	8834628950	NHS Number	29/08/1957 00:00	Yarborough	Frank	"Llyn Farris"	"Water Lane"	"Llandough"	LL23 4TG	Angina	04/02/2016 00:00	18/03/2016 00:00	
2633	1180	8888400206	NHS Number	05/05/1956 00:00	Murray	James	1 The Mase	Swansea		CF3 3FD	MI (Unknown)	01/05/2017 00:00	07/05/2017 00:00	

You can use this file to create a mailmerge for letters or labels to send the assessments to those patients needing them, or simply to identify those who haven't had an Ass 2 or 3 completed.

## DATA ENTERED REPORT:

From Date:

To Date:

Submit 

Event Records	Assesment 1	Assesment 2	Assesment 3
6	2	2	2

Phase 1	Phase 2	Phase 3	Phase 4	Commissioning Pack Early	Commissioning Pack Core
1	1	3	0	4	4

The 'Date Entered' Report shows a count of records entered by your organisation (ie. Data entered under the same NACR code), within a specified data period, and broken down by record type.

The date filter/period selected will filter records by:

**Initiating Event:** IE's created with an IE date between the dates specified.

**Assessments:** Ass (1,2, or 3) created with an Assessment Date between the dates specified.

**Phases:** Phase records (1,2,3 or 4) created with a Phase Start Date between the dates specified.

**Commissioning Pack** (Early and Core) Commissioning Pack records created with a Start Date between the dates specified.

## DEMOGRAPHICS REPORT

### Demographics Report

From Date:  

To Date:  

Submit 

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	IE Created By RCBSS	Treatment	M 0-40	M 41-50	M 51-60	M 61-70	M 71-80	M 81+	F 0-40	F 41-50	F 51-60	F 61-70	F 71-80	F 81+	Unknown 0-40	Unknown 41-50	Unknown 51-60	Unknown 61-70	Unknown 71-80	Unknown 81+
2	High Risk (>20%)	ICD, Other Surgery	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0
3	High Risk (>20%)	Transplant	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	MI (Unknown)	Pacemaker, Transplant	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0
5	Peripheral Arterial Disease		0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0
6	Peripheral Arterial Disease	Staged PCI, Transplant	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0
7	Use Treatment		1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	IE Created Elsewhere	Treatment	M 0-40	M 41-50	M 51-60	M 61-70	M 71-80	M 81+	F 0-40	F 41-50	F 51-60	F 61-70	F 71-80	F 81+	Unknown 0-40	Unknown 41-50	Unknown 51-60	Unknown 61-70	Unknown 71-80	Unknown 81+
10																				
11																				
12																				
13																				

The Demographics Report shows a count of the Initiating Event and Treatments by gender and age range

The report is split into 2 tables – one which shows data where the Initiating Events have been created by your programme; a second, underneath, that shows data where the Initiating Events were created by other centres, but that your programme has had Rehab or Assessment record activity with.

This report downloads into an Excel file.

## **REASON FOR REFERRAL REPORT**

### Reason For Referral Report

From Date:  ⓘ

To Date:  ⓘ

**Submit** ▶

	A	B	C	D	E	F
1	Initiating Event	Treatment	IE Created RCB55	IE Created Elsewhere	Total	
2	High Risk (>20%)	ICD, Other Surgery	1	0	1	
3	High Risk (>20%)	Transplant	1	0	1	
4	MI (Unknown)	Pacemaker, Transplant	1	0	1	
5	Peripheral Arterial Disease	Staged PCI, Transplant	1	0	1	
6	TOTAL		4	0	4	
7						
8						
9						

The Reason for Referral Report shows a count of patients by Initiating Event and Treatment. As the Initiating Event is a shared record, and programmes may have rehab/phase activity with a patient but may not have created the Initiating Event Record, the report shows a count of IEs created by your programme (Column C), and IEs created ‘Elsewhere’, but where your programme has a rehab record attached/associated (Column D), and a Total count (Column E).

The date range uses the Initiating Event date.

This report downloads into an Excel file.

# REHAB SUMMARY REPORT

## Rehab Summary Report

From Rehab Summary:  ⓘ

To Rehab Summary:  ⓘ

The Rehab Summary Report shows Phase and Commissioning Pack data rehab record counts, by centre creating the IE, and by centre creating the phase record. The date range calculates:

The number of IE's with an IE date within the period

The number of patients starting the phase within the period

The number of patients completing the phase within the period

So the numbers may not 'add up' – ie. there may be patients who started in this period, but didn't complete, or vice versa.

This report downloads into an Excel file.

Phase 1				
Centre Creating IE	Centre Creating Phase Record	Number of IEs	Number Starting Phase	Number Completing Phase
RCB55	RCB55	2	2	1
Phase 2				
Centre Creating IE	Centre Creating Phase Record	Number of IEs	Number Starting Phase	Number Completing Phase
RCB55	RCB55	1	2	1
Phase 3				
Centre Creating IE	Centre Creating Phase Record	Number of IEs	Number Starting Phase	Number Completing Phase
RCB	RCB55	0	1	0
RCB55	RCB55	2	3	1
Phase 4				
Centre Creating IE	Centre Creating Phase Record	Number of IEs	Number Starting Phase	Number Completing Phase
RCB55	RCB55	1	1	0
Commissioning Pack Early				
Centre Creating IE	Centre Creating Phase Record	Number of IEs	Number Starting Phase	
RCB55	RCB55	3	3	
Commissioning Pack Core				
Centre Creating IE	Centre Creating Phase Record	Number of IEs	Number Starting Phase	Number Completing Phase
RCB55	RCB55	3	4	1

## **REFERRAL TO START SUMMARY REPORT**

This report is designed to help with both the data we're reporting in our Annual Report, and data relevant for the NCP\_CR. It looks at the time from Phase 3/Core (ie. post-discharge) referral date to Phase 3 / Core start date.

### **Referral To Start Summary Report**

---

From Ref To Start:  ⓘ

To Ref To Start:  ⓘ

The date filter uses the Phase 3 start date for the Phase 3 wait times and Core Start Date (aka Baseline Assessment Date) for the Core Rehab wait times.

The report shows: the total (for all diagnosis) wait time, MI and/or PCI wait time, and CABG wait time, with the count of records, and the mean, median, and min/max wait time in days.

	A	B	C	D	E	F	G
1	Organisation Code	Type	Count	MEAN	MEDIAN	MIN	MAX
2	RCB55	Total Centre Referral to Start Time	6	3.67	3	1	7
3	RCB55	MI and or PCI Referral to Start Time	3	4	4	1	7
4	RCB55	CABG Referral to Start Time	6	3.67	3	1	7
5							

The report downloads in to Excel

## **REASON FOR NOT TAKING PART / REASON FOR NOT COMPLETING REPORTS**

From Date:  ⓘ

To Date:  ⓘ

**Export** 

	A	B	C	D	E	F	G	H	I
1	Reason	Phase 1	Phase 2	Phase 3	Phase 4	Early Comm Pack	Core Comm Pack		
2	No Service Available	0	0	0	0	1	0		
3	Transfer for PCI/Intervention	0	0	0	0	1	0		
4									
5									

The 'Reason for Not Taking Part' and 'Reason for Not Completing' reports both work in the same way and look very similar – so we've only shown one of them here as an example.

The date filter for the Reason for Not Taking Part is by Initiating Event date and the Reason for Not Completing is by Start Date. The reports show a count of each reason 'type' by rehab record.

These reports both download directly into Excel.

## OUTCOMES REPORT

### Outcomes Report

From Date:  ⓘ

To Date:  ⓘ

Time Period:  ⓘ

**Submit** ➔

	A	B	C	D	E	F	G	H
1	Outcome	No. of cases with both values	Assessment 1 (N)	Assessment 1 (%)	Assessment 2 (N)	Assessment 2 (%)	Change (% point)	
2	BMI < 30		0	0	0	0	0	
3	Exercise 150mins Per Week		1	0	0	0	0	
4	Non Smokers		0	0	0	0	0	
5	HADS Anxiety:		0					
6	HADS Anxiety: Normal		0	0	0	0	0	
7	HADS Anxiety: Borderline		0	0	0	0	0	
8	HADS Anxiety: Clinically Anxious		0	0	0	0	0	
9	HADS Depression:		0					
10	HADS Depression: Normal		0	0	0	0	0	
11	HADS Depression: Borderline		0	0	0	0	0	
12	HADS Depression: Clinically Depressed		0	0	0	0	0	
13	BP systolic < 140 and diastolic < 90		0	0	0	0	0	
14	Total cholesterol < 4		0	0	0	0	0	
15	Cholesterol LDL < 2		0	0	0	0	0	
16	Waist < 102cm (men) or < 88cm (women)		0	0	0	0	0	
17	Alcohol <= 21 units/week (men) or <= 14 units/week (women)		1	1	100	1	100	0
18	Dartmouth COOP: Physical Fitness		0	0	0	0	0	
19	Dartmouth COOP: Feelings		0	0	0	0	0	
20	Dartmouth COOP: Daily Activities		0	0	0	0	0	
21	Dartmouth COOP: Social Activities		0	0	0	0	0	
22	Dartmouth COOP: Pain		0	0	0	0	0	
23	Dartmouth COOP: Change In Health		0	0	0	0	0	
24	Dartmouth COOP: Overall Health		0	0	0	0	0	
25	Dartmouth COOP: Social Support		0	0	0	0	0	
26	Dartmouth COOP: Quality of Life		0	0	0	0	0	
27								
28								
29	Outcome	No. of cases with both values	Assessment 1 Mean	Assessment 2 Mean	Mean Change			
30	Six minute walk (metres)		0					
31	Shuttle walk (metres)		0					
32								

The 'Outcomes' Report shows Outcome measurements for the Assessment Records you have recorded on NACR. The date filter is by Assessment date and, using the 'Time Period' box, you can select to view either 12 week outcomes (Ass 1 and 2) or 12 month outcomes (Ass 1 and 3).

Outcomes can only be reported where a patient has both Assessment records/values and where the later Assessment (2 or 3) has been created by your organisation.

Outcomes BMI-Dartmouth COOP: The report will show a total count of patients with both Assessment values for the outcome measurements, the number of these with the outcome specified at Ass 1 (ie. BMI <30; Exercise 150 mins per week etc), and what percentage this is of the total number; then the number with the outcome at Ass 2 or 3 (12 week or 12 month) and the percentage this is of the total number. The final column shows the percentage point change between the two assessments.

6-minute/Shuttle Walk tests: Again the report shows a total count of patients with both assessment values, then a mean distance, in Metres, for Ass 1 and Ass 2 or 3 (12 week or 12 month), followed by the mean change (in metres) between the two.

## **ASSESSMENT BREAKDOWN SUMMARY REPORT**

### Assessment Breakdown Summary Report

From Date:  ⓘ

To Date:  ⓘ

The report shows counts and percentages of patients with a Phase 3/Core rehabilitation start date (where you have created the Phase 3 / Core Record) and Assessment 1 and Assessment 2 records

The date range uses Phase 3/Core start dates.

	A	B	C	D	E	F	G
1	Centre	Number Starting Core Rehab	Number Valid Assessment 1	Percentage of Started with Assessment 1	Number Valid Assessment 2	Percentage of Started with Assessment 2	
2	RCB55	7	6	86	0	0	
3							
4							

## **\*NEW\* DURATION SUMMARY REPORT**

This new report (Sept 2018) is another that we have introduced to help programmes monitor performance in line with the annual report and the NCP\_CR.

### Duration Summary Report

---

From Date:  ⓘ

To Date:  ⓘ

The date filters use the Phase 3 / Core (Baseline Assessment) date. The data shows the count of patients with a duration (ie. with a start and end date for Phase 3/Core), the median duration (this is the duration we use for reporting, and the NCP\_CR – the national standard for this is at least 56 days), the mean duration, and the minimum/maximum range.

	A	B	C	D	E
1	Count	Median	Mean	Minimum	Maximum
2	6	10	14	7	38
3					
4					

## **Using the Extracts**

*NB: This guide uses Access 2010*

\*\*\*\*\*

As well as the pre-written reports, which show summary patient counts, the NACR database also contains the facility to download raw data Extracts, which you can use to interrogate the data yourself. Below you will find some basic instructions on how to use these files, and how to write basic queries. If at any point you want some advice, or to check that the queries you are running are correct, please contact us for support.

**NB:** You will need MS Access installed on your PC in order to use these extract files.

Go to 'Reporting' on the database, and click on Extract:

## Reporting

> Extract

> All Patient View

> Missing Key Fields View

> Follow Up Due Report

You will have a list of available extracts – you are interested in the 3 extracts, Patient, Initiating Event and Rehabilitation, which relate to 3 of the different file/record types on the database (you can use Assessment Extract too, but this makes the query/data more complex – it's best to contact us for advice if you want to look at assessments/outcomes):

## Extract

> Patient

> Initiating Event

> Assessment

> Rehabilitation

> Deletion Log

> Configurable Extract

Essentially what we are going to do is download the data from these 3 files, import it into Access as 3 tables, and join these tables together so you can look at all the data combined.

**Step 1:** Click on 'Patient' and select a date range – remember that this date range uses the date the record is **created**, so it's best to make the range larger than you think you might need, as you can always filter the data better later on when it's in Access. Then click on Export:

### Patient Extract

From Date:  ⓘ

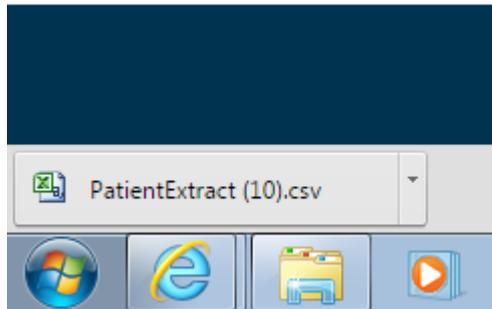
To Date:  ⓘ

Export >

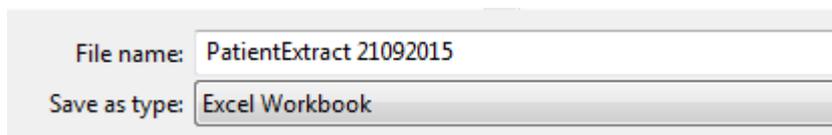
If you are doing this in Internet Explorer, it will ask you if you wish to open or save the file. Choose 'open' and it will open in Excel:



If you are using Google Chrome, it will just download it, and you will need to open it from the bottom bar of your browser:



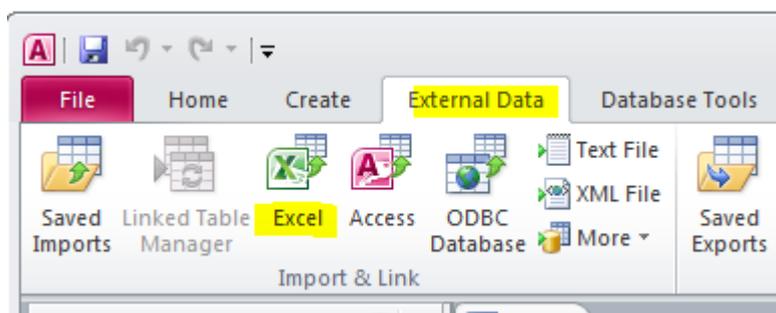
Your file is a .csv file, but you need to save it as an **Excel Workbook** in order to use it in Access. So, decide where you want to save it – if this is something you're going to want to do regularly, then perhaps create a folder somewhere so all these files are in the same place – then click on 'Save As', select your location, save it with a unique name – we would suggest *Patient* followed by today's date – and select 'Excel Workbook' from the 'Save as type' dropdown list:



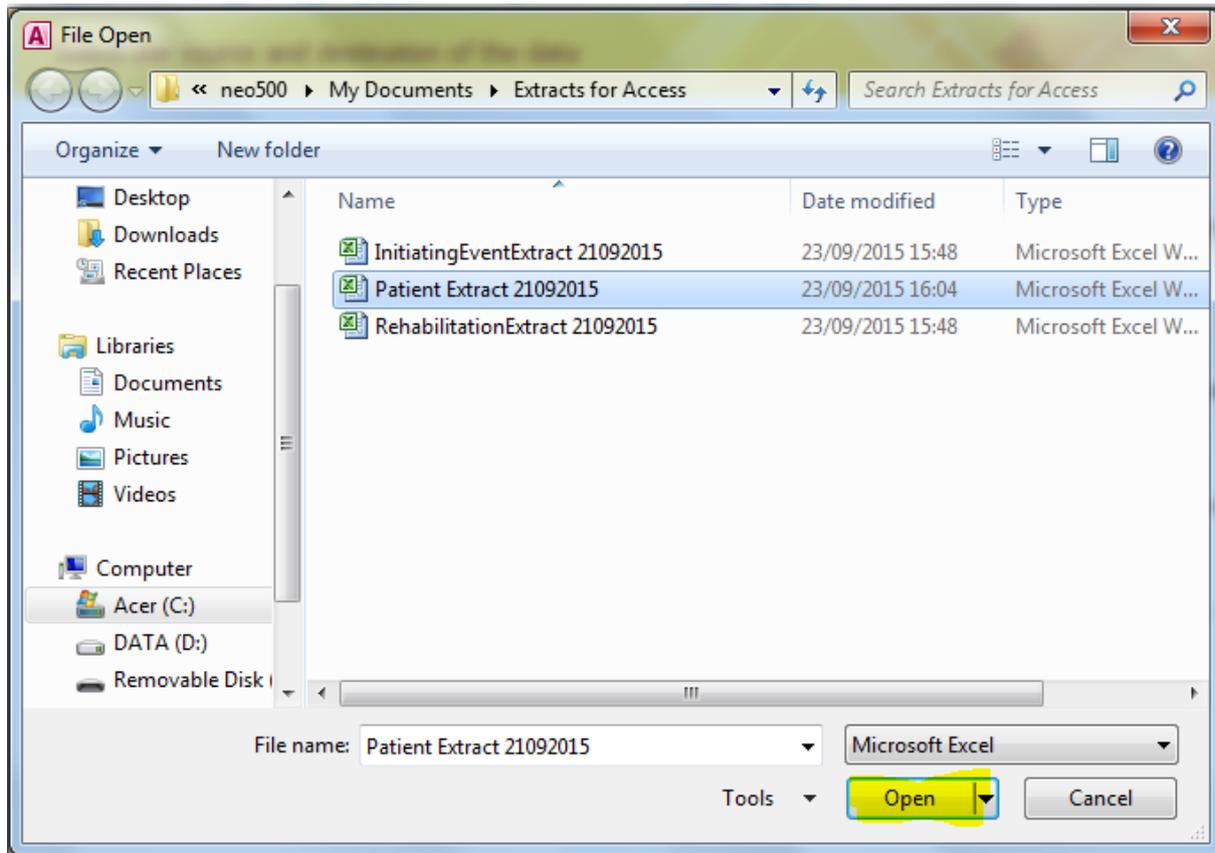
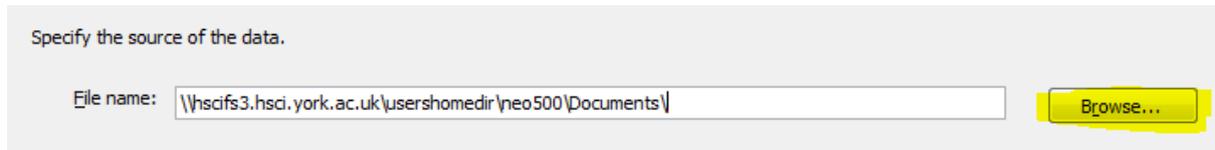
**Step 2:** Repeat Step 1 for the Initiating Event and Rehabilitation Extract files. Make sure you use the same date range for each as you did for the Patient file. And save them, in the same folder, as the Patient file, using the 'extract name + today's date' format, as an Excel Workbook.

Open Access, and double click on 'Blank Database' :

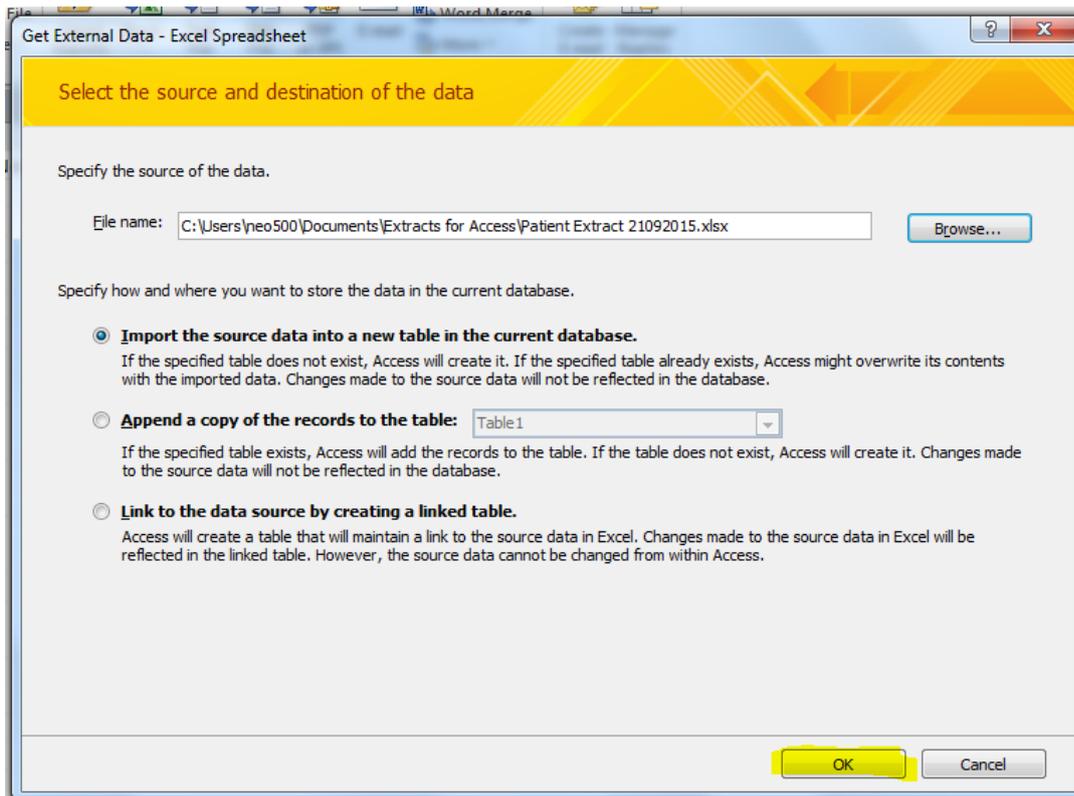
**Step 3:** Click on 'External Data' and 'Excel'



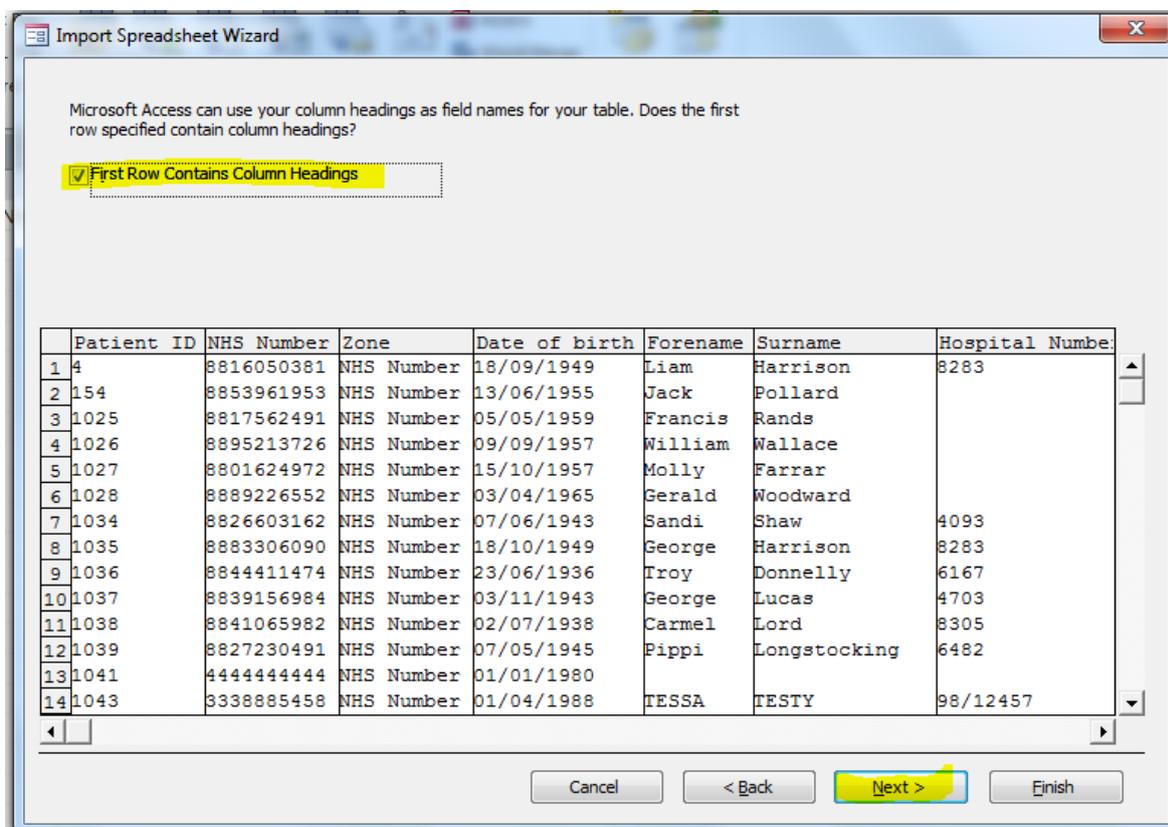
A 'Get External Data' box will appear. Click on 'Browse' next to the 'File Name' box and find the Patient extract file you saved earlier, and click on 'Open':



Keep the selections on the next pop up box, and click 'OK'



Make sure 'First Row contains column headings' is ticked, and click on 'Next':



You shouldn't need to change anything on the next screen, so click 'Next' again:

Import Spreadsheet Wizard

You can specify information about each of the fields you are importing. Select fields in the area below. You can then modify field information in the 'Field Options' area.

Field Options

Field Name:  Data Type:

Indexed:   Do not import field (Skip)

	Patient ID	NHS Number	Zone	Date of birth	Forename	Surname	Hospital Number
1	4	8816050381	NHS Number	18/09/1949	Liam	Harrison	8283
2	154	8853961953	NHS Number	13/06/1955	Jack	Pollard	
3	1025	8817562491	NHS Number	05/05/1959	Francis	Rands	
4	1026	8895213726	NHS Number	09/09/1957	William	Wallace	
5	1027	8801624972	NHS Number	15/10/1957	Molly	Farrar	
6	1028	8889226552	NHS Number	03/04/1965	Gerald	Woodward	
7	1034	8826603162	NHS Number	07/06/1943	Sandi	Shaw	4093
8	1035	8883306090	NHS Number	18/10/1949	George	Harrison	8283
9	1036	8844411474	NHS Number	23/06/1936	Troy	Donnelly	6167
10	1037	8839156984	NHS Number	03/11/1943	George	Lucas	4703
11	1038	8841065982	NHS Number	02/07/1938	Carmel	Lord	8305
12	1039	8827230491	NHS Number	07/05/1945	Pippi	Longstocking	6482
13	1041	4444444444	NHS Number	01/01/1980			
14	1043	3338885458	NHS Number	01/04/1988	TESSA	TESTY	98/12457

Cancel < Back Next > Finish

In the next table, you need to select a Primary Key for the table. We recommend you use NHS Number (but you can use others, like the Patient ID). Select this, as shown below, and click on 'Next':

Import Spreadsheet Wizard

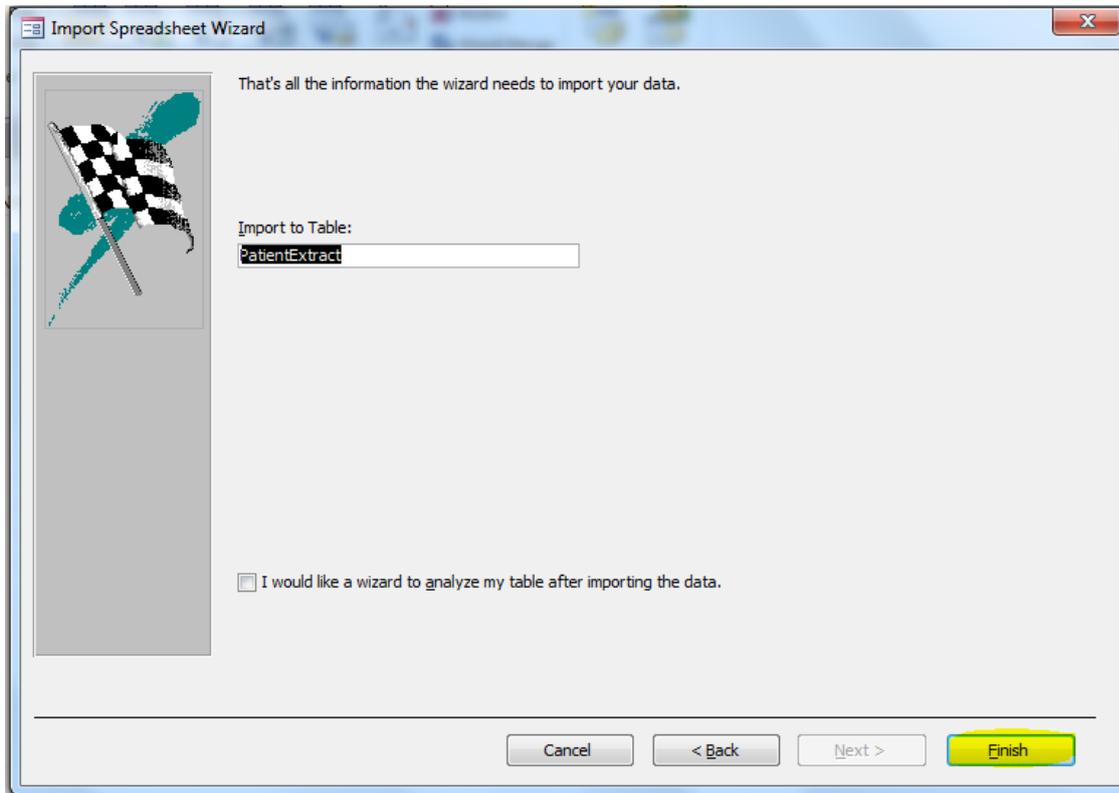
Microsoft Access recommends that you define a primary key for your new table. A primary key is used to uniquely identify each record in your table. It allows you to retrieve data more quickly.

Let Access add primary key.  
 Choose my own primary key.   
 No primary key.

	Patient ID	NHS Number	Zone	Date of birth	Forename	Surname	Hospital Number
1	4	8816050381	NHS Number	18/09/1949	Liam	Harrison	8283
2	154	8853961953	NHS Number	13/06/1955	Jack	Pollard	
3	1025	8817562491	NHS Number	05/05/1959	Francis	Rands	
4	1026	8895213726	NHS Number	09/09/1957	William	Wallace	
5	1027	8801624972	NHS Number	15/10/1957	Molly	Farrar	
6	1028	8889226552	NHS Number	03/04/1965	Gerald	Woodward	
7	1034	8826603162	NHS Number	07/06/1943	Sandi	Shaw	4093
8	1035	8883306090	NHS Number	18/10/1949	George	Harrison	8283
9	1036	8844411474	NHS Number	23/06/1936	Troy	Donnelly	6167
10	1037	8839156984	NHS Number	03/11/1943	George	Lucas	4703
11	1038	8841065982	NHS Number	02/07/1938	Carmel	Lord	8305
12	1039	8827230491	NHS Number	07/05/1945	Pippi	Longstocking	6482
13	1041	4444444444	NHS Number	01/01/1980			
14	1043	3338885458	NHS Number	01/04/1988	TESSA	TESTY	98/12457

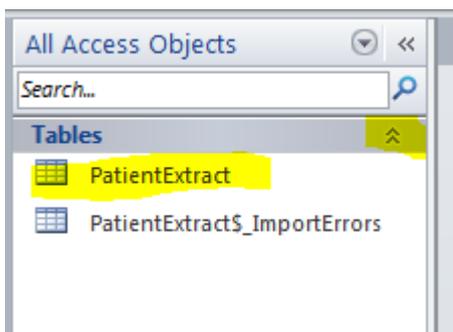
Cancel < Back Next > Finish

The data will import into an Access Table called PatientExtract (unless you give it a new name). Click on 'Finish':



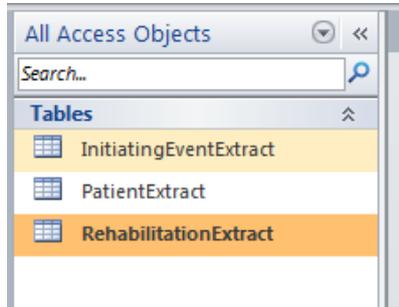
A 'Save Import Steps' box may appear – click on 'Close' on this box, at this point we don't need to save import steps. It may also say not all the data has imported – this will likely be unusable records, so don't worry about this.

In the Navigation Pane to the left hand side of Access, you will see your Table listed (if they don't show, click on the arrow to the right of the column):



You now need to repeat 'Step 3' to import the InitiatingEvent Extract, and the RehabilitationExtract into your Access database. You may get error messages saying you have duplicate data – just click OK on these, and move on, they don't affect the imported data.

When you have imported all 3 tables, they should all show in the Tables list in the navigation pane (nb. The 'Import errors' table has been deleted)



You can now use either the 'Query Wizard' or 'Query Design' functions (or a combination of the two) to link the 3 tables together so you can pull data out of them – both methods are shown below, the 'Query Wizard' is more basic, the 'Query Design' allows you to be more specific about the query criteria (but is a bit more complex to use). Try both perhaps, and see which works best for you. You can also start off using the basic Query Wizard to build the rough information you want, then tweak the design/criteria with the 'Query Design' after.

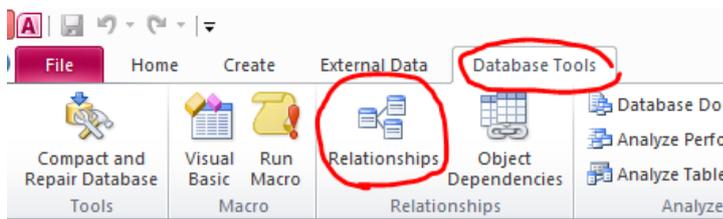
#### **Step 4a: USING 'QUERY WIZARD'**

Use this to build your basic query – you can then tailor it a bit more using the criteria as outlined in the 'Query Design' information below, if you wish.

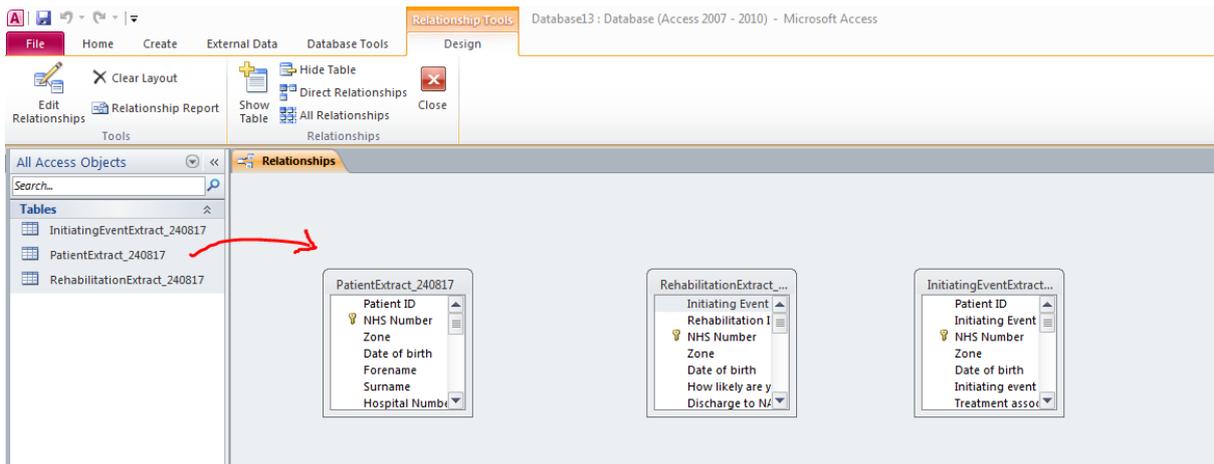
Import your excel files into Access as shown in steps 1-3 above.

You then need to link the tables together, so you can pull data from all three and it connects the patient information:

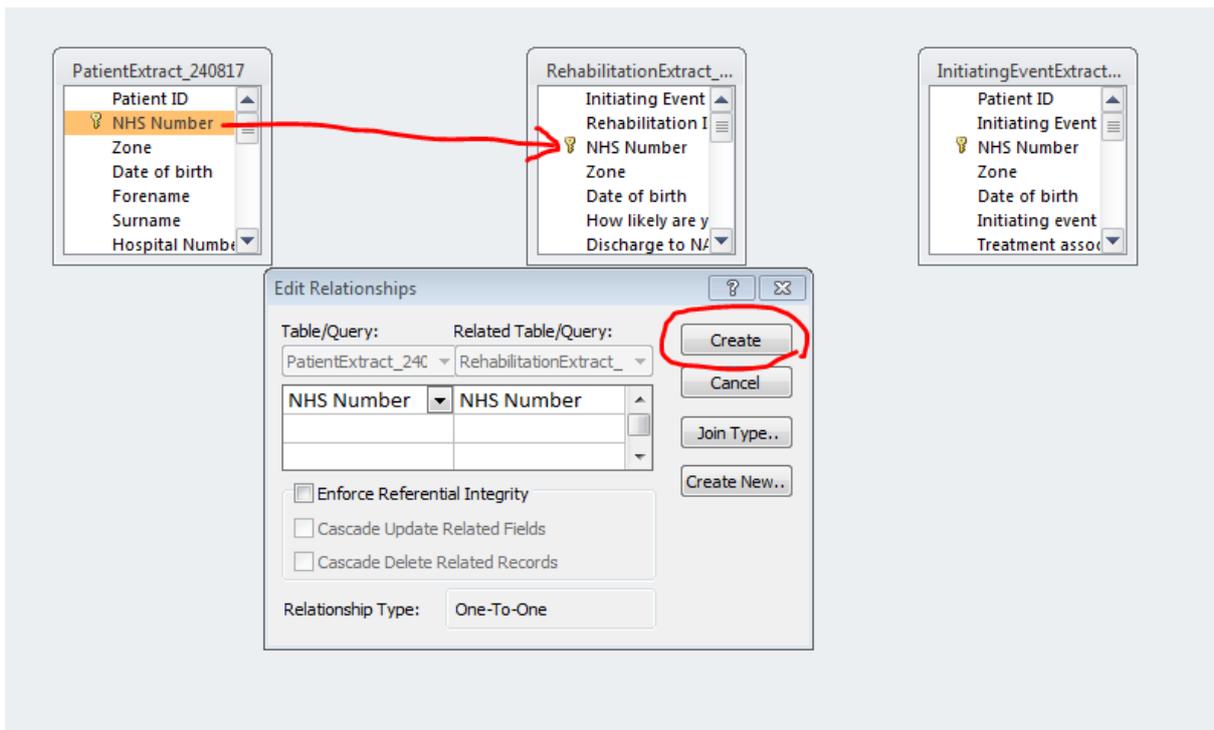
Click on the Database Tools tab, and 'Relationships'



Select all 3 tables in the list to the left, and drag/drop them into the 'Relationships' side of the screen:

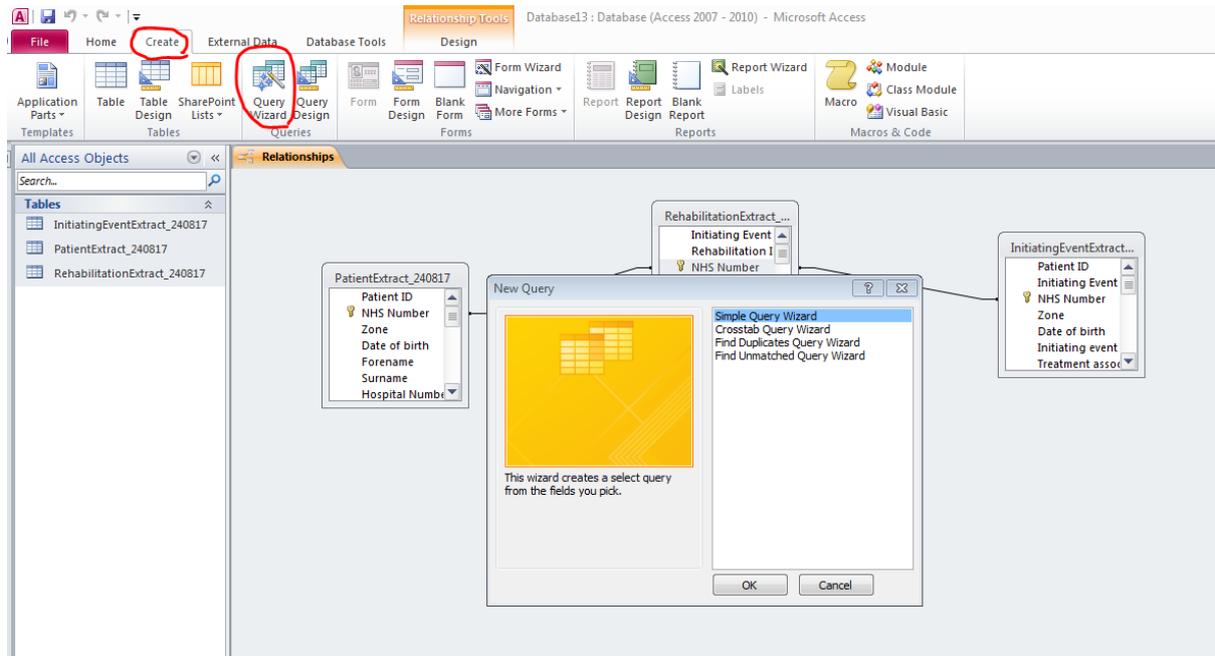


Then select a field to link the 3 tables together – it has to be the same field that is in each of the 3 tables – NHS number is a good one to use. If you click on 'NHS Number' in the first table, then drag your cursor to where it says NHS number in the next tab, it will bring up this box. Click on 'Create':

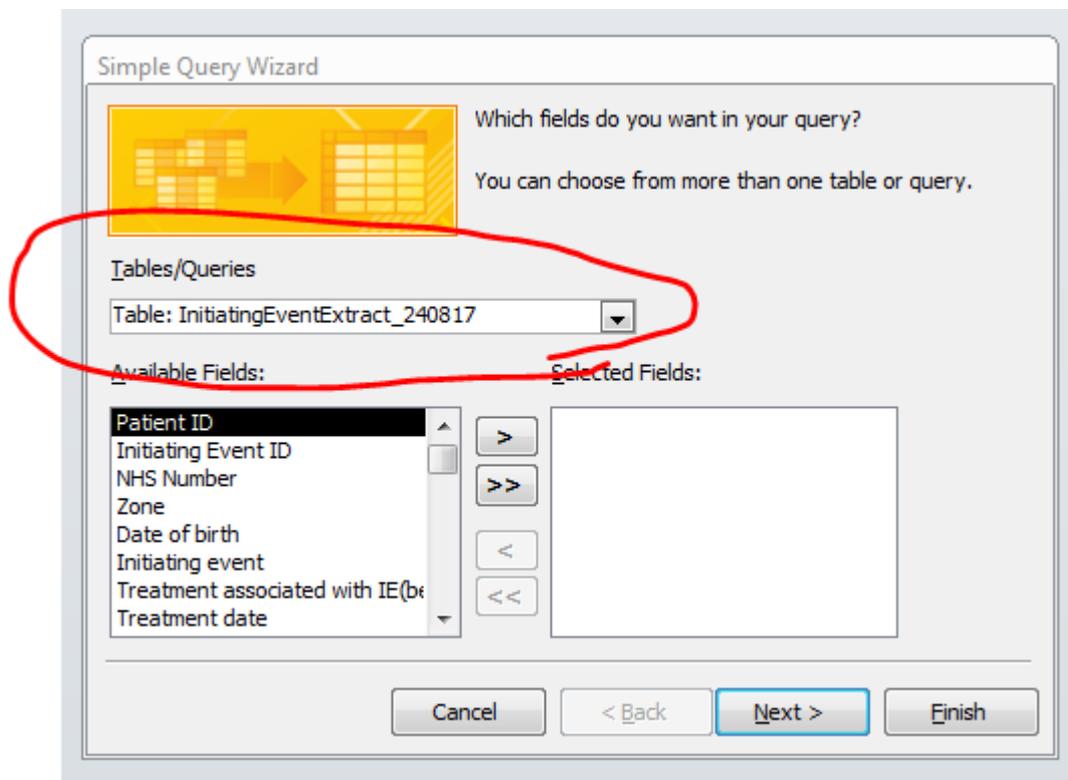


Do the same for the NHS Number field between the second and third tables too.

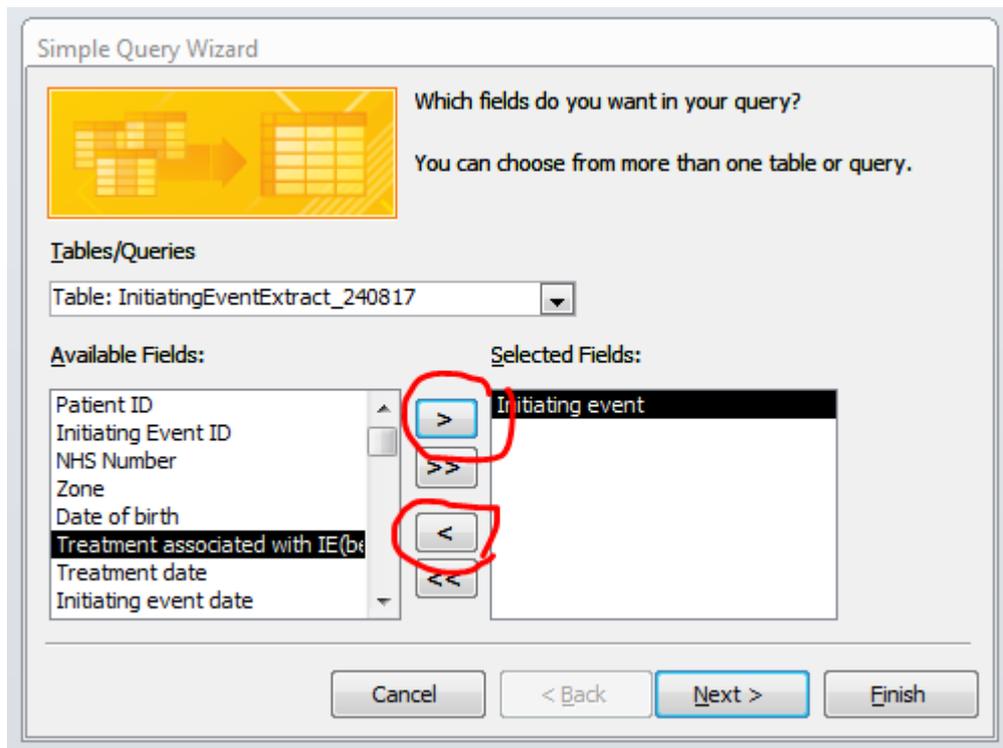
Then click on the 'Create' tab, and Query Wizard – select 'Simple Query Wizard' and click OK:



Use the drop down list to select the table you want to use:



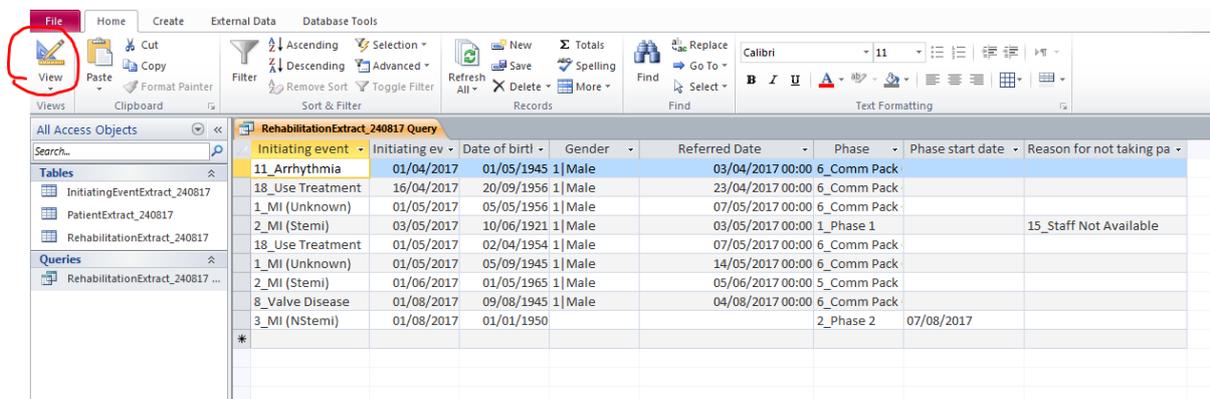
And use the arrows to move the fields you want between the list on the left and the selected fields for the query on the right:



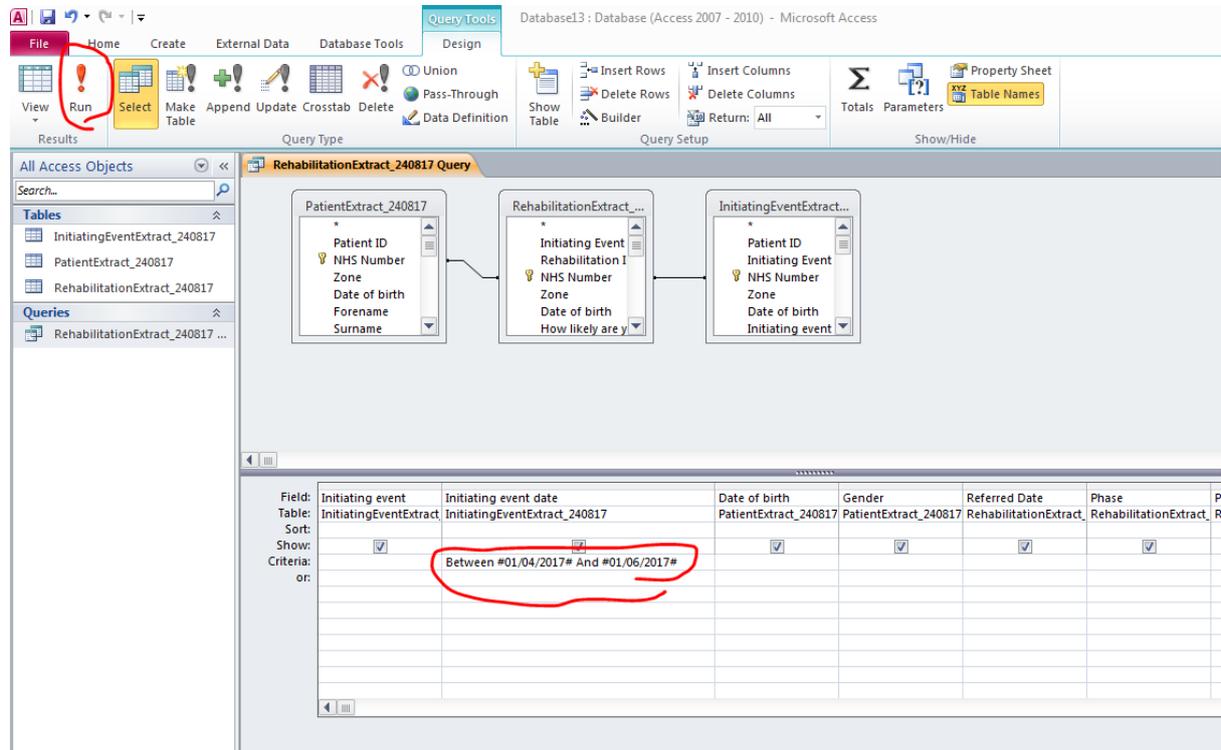
NB: Please remember that any organisation can create a part of a patient’s record. Therefore, more than one organisation can be involved in the patient’s care. It’s a good idea to make sure that you include the **‘Created By Organisation’** field, and filter those created by your organisation when you are looking at Rehab Records, in order to get an accurate count. When you have all the fields you want, click on ‘Next’ then ‘Finish’

You will get a table similar to the one below. You can sort and filter the columns (or export the whole table to Excel if you prefer).

You can also add criteria to the columns (as outlined in the Query Design instructions below) by clicking on the ‘View’ button (‘Home’ tab):

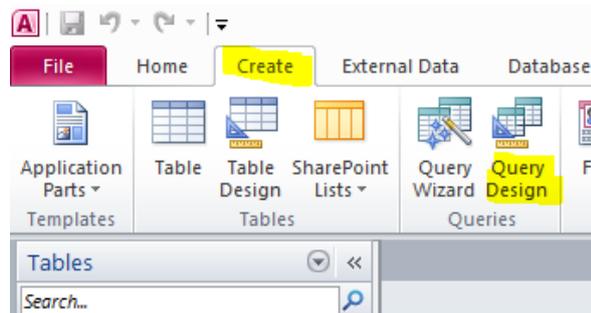


This will give you a screen like this – you can add in criteria like date ranges, if you wish, as shown below (use the list in the Query Design section below, of common criteria, to help you with these, as the format must be correct). Click on ‘Run’ to see the new results:

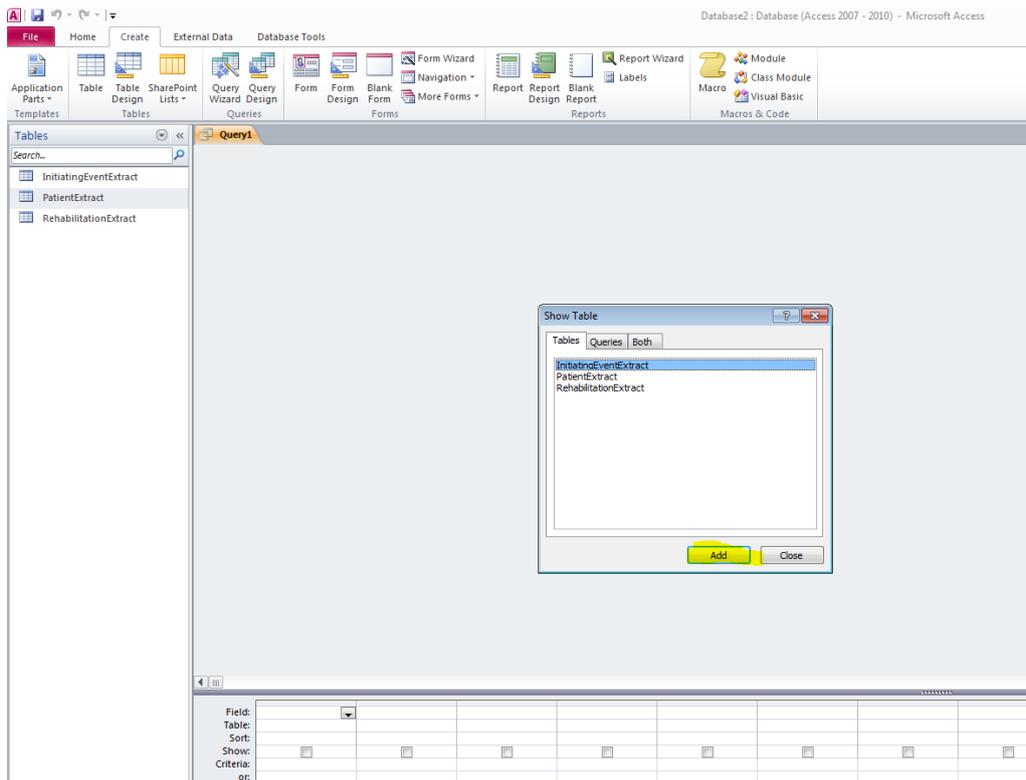


### **Step 4b: USING ‘QUERY DESIGN’**

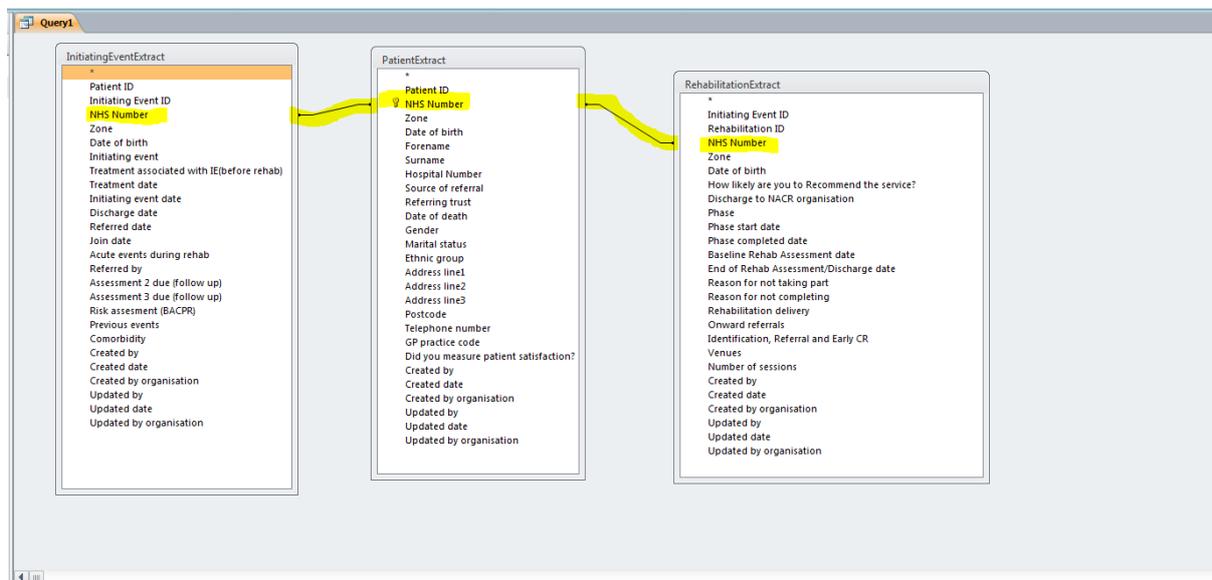
Import your data/tables, as outlined above. Click on ‘Create’ and ‘Query Design’



This will open a blank query. You need to ‘Add’ all 3 tables. Highlight each table one by one, and click on ‘Add’, then ‘Close’ the ‘Show Table’ box :



You can move the boxes around, and drag the edges to expand the size so you can see all the fields listed in each one. You will notice there is an arrowed line going between each of them. This links the NHS number field in each table, making it possible to build a query using data from the 3 different tables:



You can now combine fields, put in date ranges / specific criteria in order to have a look at your data in more detail. Double click, or drag and drop a field to add it to the query criteria box below the tables.

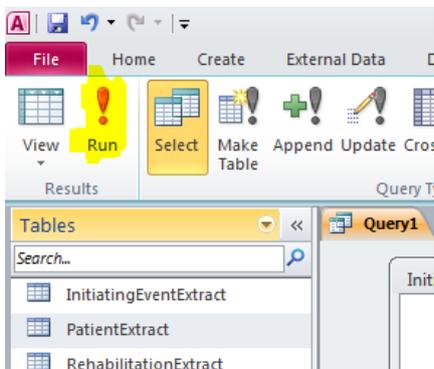
Here's a simple example:

A list of patients and their Initiating Events / Treatments, between specific IE dates:

Field:	NHS Number	Surname	Initiating event	Initiating event date	Treatment associated with IE(before rehab)
Table:	PatientExtract	PatientExtract	InitiatingEventExtract	InitiatingEventExtract	InitiatingEventExtract
Sort:					
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:				Between #01/04/2013# And #31/03/2014#	
or:					

Fields selected are NHS no. and Surname from the Patient Extract, and Initiating Event, Initiating Event Date and Treatment from the Initiating Event Extract. The date range has been put in the 'criteria' line under the Initiating Event Date column (NB. If you don't put a date range in, the query will pull patients from all the data in the tables).

Back in the top LH corner of Access, click on the red exclamation mark to run the query:



Your query will run, and you'll get a table showing results, similar to this:

NHS Number	Surname	Initiating event	Initiating event date	Treatment associated with IE(before rehab)
8844411474	Donnelly	3_MI (NStemi)	08/01/2014	2_PPCCI   3_CABG
3338885458	TESTY	2_MI (Stemi)	01/09/2013	8_Pacemaker   10_LV Assist Device
3338885458	TESTY	2_MI (Stemi)	01/09/2013	8_Pacemaker   10_LV Assist Device
4000576704	BAKERSFIELD	19_Peripheral Arterial Disease	01/04/2013	6_Tricuspid Repair/Replace   7_Medical Management   8_Pacemaker
9998887771	QUINCE	15_High Risk (>20%)	01/01/2014	9_Transplant   10_LV Assist Device
9998887771	QUINCE	15_High Risk (>20%)	01/01/2014	9_Transplant   10_LV Assist Device

### How to Filter your results

When you're putting in 'criteria' to filter your results, you need to use very specific language and make sure that, if for example you're wanting to look for a specific Initiating Event, or Phase, that you include the name exactly how it is in the database. For example, if you look at the table above, to search for all MI non-stemi initiating events, you would have to use the criteria term:

= '3\_MI (NStemi)'

For all MI Stemi patients it would need to be:

= '2\_MI (Stemi)'

Similarly if you wanted to look for Phase 3 Rehab Records, you would need to use the criteria:

= '3\_Phase 3'

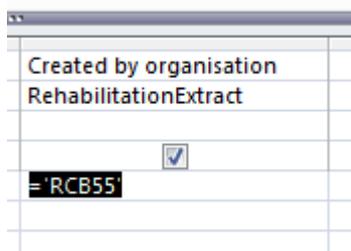
Or for Core Rehab:

= '6\_Comm Pack Core'

To search between two dates, you need to use the following format:

Between dd/mm/yyyy and dd/mm/yyyy

Please remember that any organisation can create a part of a patient's record. Therefore, more than one organisation can be involved in the patient's care. You need to make sure that you include the 'Created By Organisation' field, and filter those created by your organisation, so you are only looking at your own Rehab Records in order to get an accurate count eg:



Instead of RCB55, you would put your own organisation code in.

A useful online page to bookmark, which has a list of some of the most common criteria:

<https://support.office.com/en-us/article/Examples-of-query-criteria-3197228c-8684-4552-ac03-aba746fb29d8>

Any queries regarding the wizard, or the query design tools, or about how to make best use of the extracts and ensure you're getting accurate reports, please contact the NACR team:

[Email: nerina.onion@york.ac.uk](mailto:nerina.onion@york.ac.uk)

Tel: 01904 321326