

Working Instructions Practice Search

For practice administrators and GPs conducting searches to identify patients to invite to screening/baseline clinic for OPTiMISE

Practice Administrators

- 1) Conduct an electronic search using the search string provided, which includes the following criteria:

Inclusion:

- ≥ 80 yr
- Clinic systolic blood pressure <160 mmHg (we anticipate that blood pressure will be at least 10mmHg lower when measured by a research facilitator at the study screening visit)
- Prescribed two or more antihypertensive medications for at least 12 months prior to trial entry (use report to count total anti-hypertensives prescribed)

Exclusion:

- Myocardial infarction within past 12 months
- Stroke within past 12 months
- Secondary hypertension
- Previous accelerated or malignant hypertension
- Unable to provide consent due to incapacity

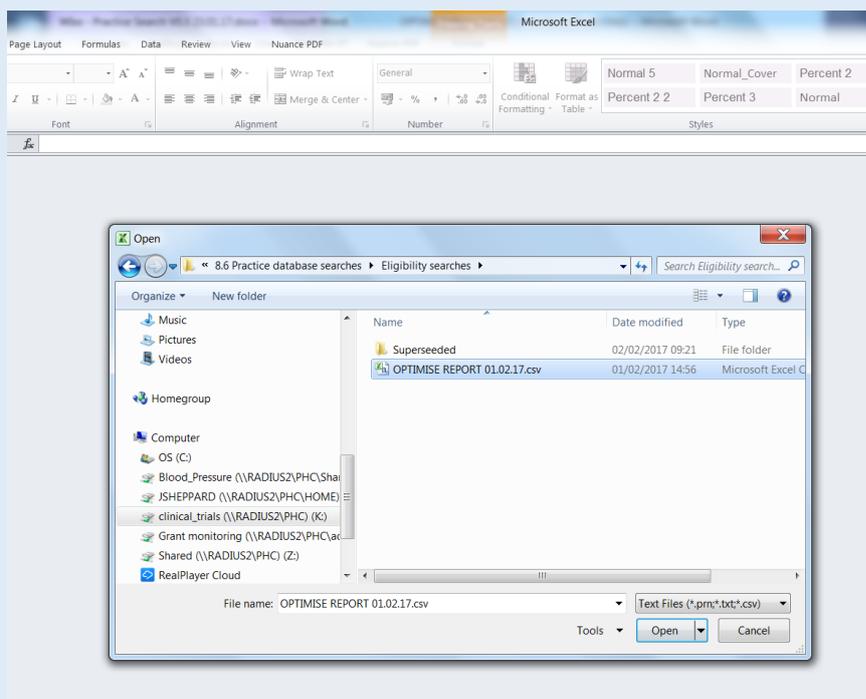
Run the Search in EMIS:

- 1) The study team will email you the patient search. Please save the attachments "OPTIMISE REPORT V3.0 01.03.17.xml", and "OPTIMISE REPORT V3.0 01.03.17_template.xls" somewhere on your practice computer.
- 2) Go into the Reports section of EMIS and open the directory where you have saved the search.
- 3) From the Reports menu, click Import the file and save it into the directory above.
- 4) Run the "OPTIMISE REPORT V3.0 01.03.17.xml" search report.
- 5) Once it has run, check that the search has run properly using the "patients included tab" (eg. look at the first patient's clinical record and check that they have hypertension and that their last recorded BP is <160 mmHg).
- 6) Use the View function from the menu which should open a spreadsheet. Then then Export as an **.CSV** file (*not an Excel file at this stage*) and save the in the directory chosen above.

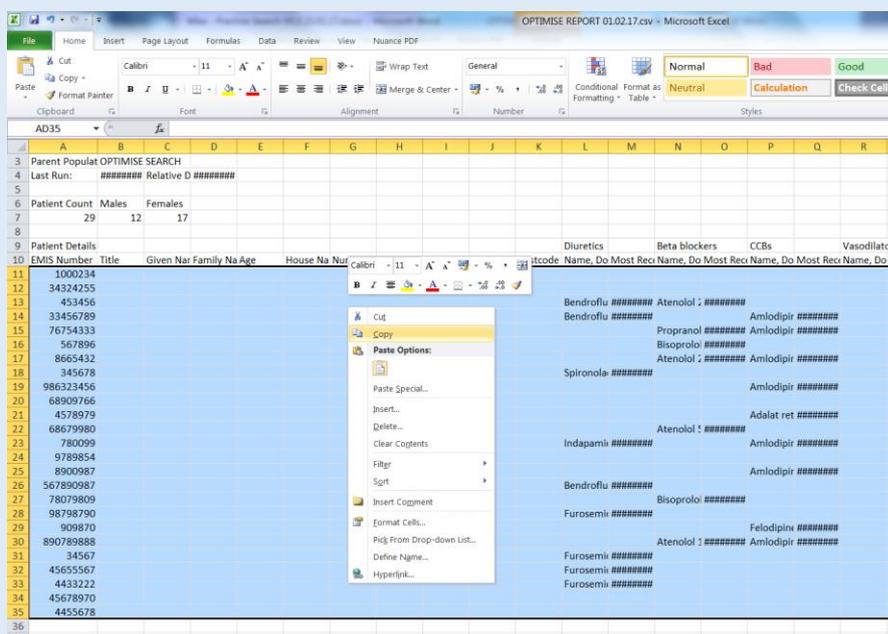
2) Edit the report of potentially eligible patients:

Edit the Search Report:

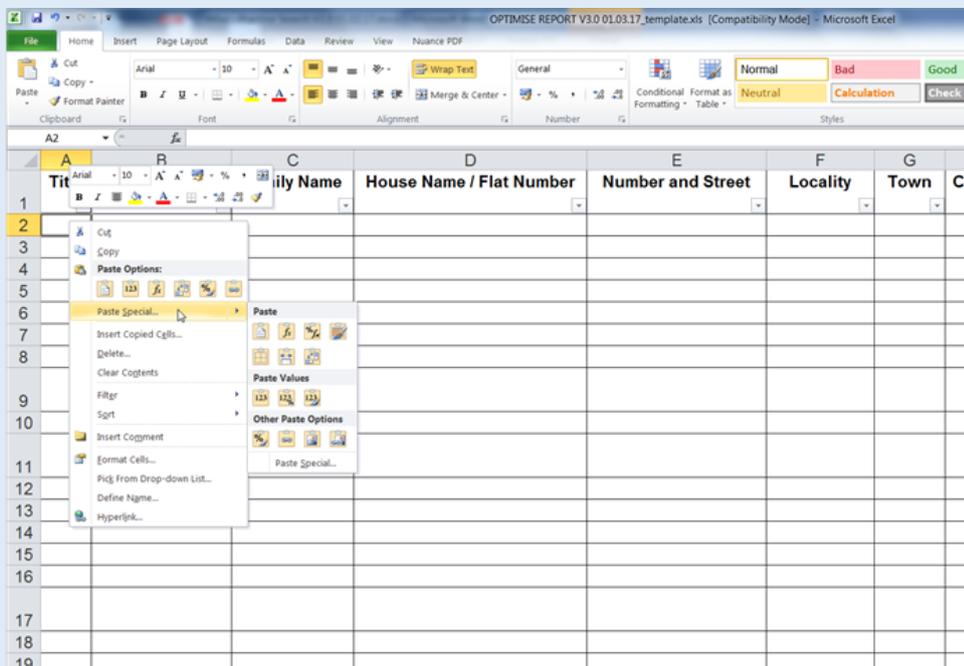
- 1) Open Excel.
- 2) From the file menu, click the open tab and then open the .CSV file created by the search above.



- 3) Click on the first EMIS ID number in column A (cell A11). Holding down the cursor, select all of the data in the data table (35 columns and as many rows as there are patients identified in the search). Right clicking on the blue highlighted section, select copy.



- 4) Open the Excel file “OPTIMISE REPORT V3.0 01.03.17_template.xls” you saved into the directory above.
- 5) Right click on cell A2, and select ‘paste values’.



- 6) The data from your search report should be pasted into the template, and columns AJ to AM should be populated with numbers. Check the first row to ensure the number in column AG corresponds to the number of drugs prescribed to that patient.

AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM
Date of Issue	Name, Dosage and Quantity	Date of Issue	Clinical Code	Code Term	Date	Number of drug	HF & two meds	IC4	Invite
1									
2	42769					2	0	1	1
3						2	0	1	1
4						2	0	1	1
5						1	0	0	0
6						1	0	0	0
7			G58	Heart failure	40602	2	1	1	1
8			G58	Heart failure	42717	1	0	0	0
9						2	0	1	1
10						3	0	1	1
11	42741					2	0	1	1
12	42775	Doxazosin 1mg tablets	42475			1	0	0	0
13						2	0	1	1
14						0	0	0	0
15						1	0	0	0
16	42752					1	0	0	0
17						0	0	0	0
18						2	0	1	1
19						1	0	0	0
20						3	0	1	1
21	42767					2	0	1	1
22						1	0	0	0
23						1	0	0	0
24	42717					2	0	1	1
25	42788					3	0	1	1
26						1	0	0	0
27						1	0	0	0
28						2	0	1	1

- 7) Click on the filter button in the Invite column (column AM) and select “largest to smallest”.

AD	AE	AF	AG	AH	AJ	AJ	AK	AL	AM
Date of Issue	Name, Dosage and Quantity	Date of Issue	Clinical Code	Code Term	Date	Number of drug	HF & two meds	IC4	Invite
1									
2	42769					2	0	1	1
3						2	0	1	1
4						2	0	1	1
5						2	0	1	1
6						2	0	1	1
7			G58	Heart failure	40602	2	1	1	1
8			G58	Heart failure	42717	2	0	1	1
9						3	0	1	1
10						2	0	1	1
11	42741					2	0	1	1
12	42775	Doxazosin 1mg tablets	42475			2	0	1	1
13						2	0	1	1
14						2	0	1	1
15						2	0	1	1
16	42752					2	0	1	1
17						2	0	1	1
18						2	0	1	1
19						2	0	1	1
20						2	0	1	1
21	42767					2	0	1	1
22						1	0	0	0
23						1	0	0	0
24	42717					2	0	1	1

- 8) Delete any rows of data which do not have 1 in the invite column (column AM).

AD	AE	AF	AG	AH	AJ	AJ	AK	AL	AM
Date of Issue	Name, Dosage and Quantity	Date of Issue	Clinical Code	Code Term	Date	Number of drug	HF & two meds	IC4	Invite
1									
2	42769					2	0	1	1
3						2	0	1	1
4						2	0	1	1
5						2	0	1	1
6			G58	Heart failure	40602	2	1	1	1
7						2	0	1	1
8	42741	Doxazosin 1mg tablets	42475			3	0	1	1
9						2	0	1	1
10						2	0	1	1
11						2	0	1	1
12	42767					3	0	1	1
13	42717					2	0	1	1
14	42788					3	0	1	1
15						2	0	1	1
16						1	0	0	0
17						1	0	0	0
18						1	0	0	0
19	42775		G58	Heart failure	42717	1	0	0	0
20						0	0	0	0
21						1	0	0	0
22	42752					1	0	0	0
23						0	0	0	0
24						1	0	0	0
25						1	0	0	0
26						1	0	0	0
27						1	0	0	0

- 9) Save the excel spreadsheet with a new file name.
10) If you have any difficulties, please contact the research team immediately for assistance.



- 3) Complete Part 1 of the Search Report Form (to record the number of patient identified by the search).
- 4) Pass the following to OPTiMISE lead GP:
 - Search Report Form (the GP needs to complete Part 2).
 - The edited version of the search report saved in the directory above.
- 5) The GP should return the revised list to you for you to organise invitation packs to be sent to the patients identified, using DOCMAIL (please see Working Instructions – DOCMAIL).

GPs

1) You will be presented with the list of patients identified by an electronic search of your practice patient list. Please review and exclude any patients who meet the following criteria:

- Compelling indication for medication continuation (EC3).
- Blood pressure managed outside of primary care (EC5).
- Any other significant disease or disorder which, in the opinion of the Investigator, may either put the participants at risk because of participation in the trial, or may influence the result of the trial, or the participant's ability to participate in the trial (e.g. terminal illness, house bound and unable to attend baseline and follow up clinics) (EC9).

Please refer to Reference Guide @@ – Eligibility Criteria OPTiMISE, for the exhaustive list of the trial inclusion and exclusion criteria.

2) Complete Part 2 of the *Search Report Form* and return either by post or email to:

Primary Care Clinical Trials Unit, Nuffield Department of Primary Care Health Sciences, University of Oxford Radcliffe Primary Care Building, Radcliffe Observatory Quarter, Woodstock Road, Oxford, OX2 6GG.

optimise@phc.ox.ac.uk

3) Return the revised patient list to the administrator to organise invitation packs to be sent.