Patient reference group data collection tool  
USER GUIDE

1 Contact details

Entering new records

Open contact tool.xls. Macros will need to be enabled for the tool to function.

Enter the practice name in the main menu page.

To enter patient contact details select Add Records button.

When entering the first record a message may appear.

Click OK. This message will not appear again.

Use the form to enter the patient details. To shift to the next field use the Tab key or select each field using the cursor.

Once all relevant fields have been completed the record is saved by pressing the New button.

If there are further records to enter then repeat, otherwise select the Close button.

Use Return to main menu to choose further options.

Editing patient records

To change any details select the Edit Records button from the main menu.
To find a specific record select the **Criteria** button on the form. This will clear the form. Include the details of the record you wish to amend eg surname.

Select the **Find Next** button. This will show the details of the first record that meets the criteria. If more than one record meets the criteria use the Find Next button to scroll through the records.

Once the correct record is selected, amend the details and press enter to confirm the changes.

**Deleting records**

Use the same process described above to select the record that is to be deleted. Once the record is selected use the **Delete** button to remove the record.

**2 Reports**

Five reports can be run to display the profile of the PRG. These can be printed out separately or copied into the local patient participation report template.

To run each report, select the appropriate button from the main menu. The results can then be printed or copied in the normal way. Always use the buttons as this ensures the reports are updated.

Use **Return to main menu** to choose further options.

**3 Contact details**

The tool can provide both email and postal addresses to enable contact with the PRG.

From the main menu select the relevant button for email/postal. Copy the email addresses into the **To** box. The postal addresses are in a format that can be used for mail merges.