 Best Practice Data Cleaning (Steps taken from BP knowledge base)

Cleaning up un-coded and free text data

BP Premier offers a range of clean-up utilities that can merge:

- obsolete contact categories
- document categories
- reminders
- un-coded past history items.

CLEANING UP REMINDERS

1. From the main Best Practice screen, select **Setup** > **Configuration** > **Reminders**.

2. In the **Reminder Reason** section, click **Clean Up**. The **Clean up reminders** screen will appear.

The left hand side shows all the Reminder reasons associated with reminders in the database: both entered as free text and from the

coded **Reminder reason** drop-down. The right hand side shows all the reminder reasons that have been actually added into the **reminder reason** table on the previous screen.
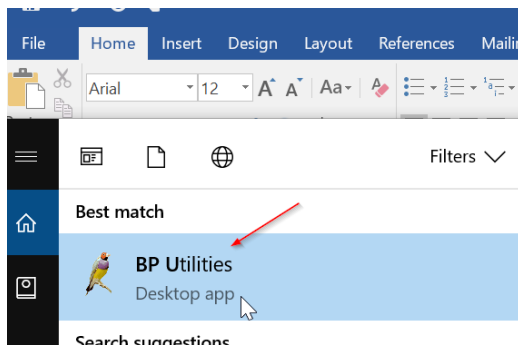

3. Before you start the clean-up process, it is good practice to ensure that the **Reasons** list contains only Reminder reasons that you feel are relevant for your clinic's use. Edit and remove unwanted reasons from the **Configuration** > **Lists** screen.

4. To merge document categories, select the items on the left hand side that you want to merge into a category on the right hand side. Select multiple items by using Ctrl+Click.

5. Once the items are selected on the left hand side, select the item on the right you wish to merge them to.

6. Click **Change**. A prompt will display to ensure you wish to change the selected reasons to a category.

7. Make sure that you have the correct items selected and click **Yes** to merge.

8. Repeat steps 4–7 for any other reminders you want to clean up.
Click **Close** to return to the **Configuration** screen.

CLEANING UP UNCODED PAST HISTORY ITEMS

You can clean up un-coded conditions that have been recorded in the **Past History** section of Best Practice. Cleaning up un-coded items makes it easier to perform database searches and manage third-party clinical audit tools.
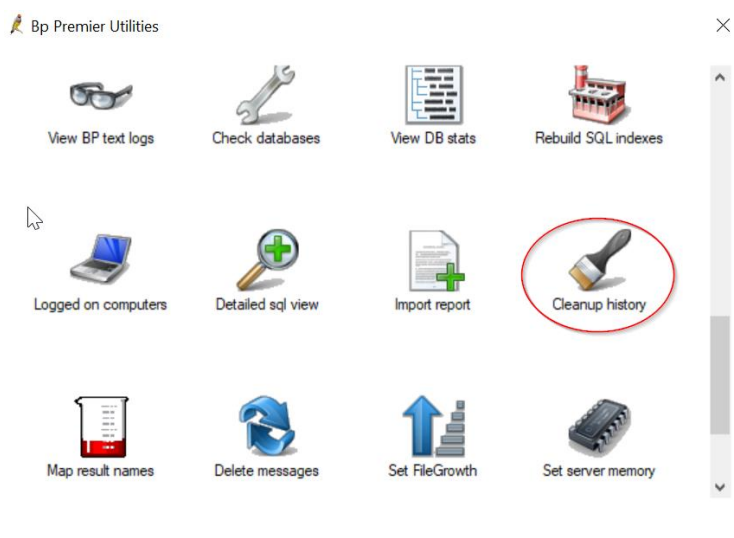
Past history, clean-up is not accessed through the BP Premier main screen, but through the BP Premier Utilities functions. Users will need the **Past History** user permission set to 'Add/Edit/Delete' to use this clean-up function.

1. On Windows 8 or later, select the Windows logo in the bottom left > **Apps** > **BP Utilities**.

On Windows 7 or earlier, select **Start** > **Programs** > **Best Practice Software** > **Best Practice** > **BP Utilities**.

2. Select your user name from the drop down list and enter your password.

3. Double-click on the **Clean up history** icon. The **Past History clean up** screen will appear.

The **Un-coded Past History Items** list shows all past history entries entered into the database, from a conversion or free text.
The **Conditions** list is the list of coded conditions entered into Best Practice.

4. On the left hand side, select the items that will be merged to a coded condition. Use Ctrl+click to select multiple items.

5. To filter the coded **Condition** list, enter the coded condition you want to map to into the keyword search field and click **Keyword**.

6. Select the condition to merge to and click **Replace**. In the example above, several free text abbreviations for diabetes are being remapped to the coded condition 'Diabetes Mellitus - Type 2'.

7. A prompt will display to ensure you wish to merge the selected items to a category. Make sure that you have the correct items selected and click **Yes**.

8. Repeat steps 4–7 for any other un-coded items you want to clean up. Click **Close** to close the **Past History clean up** screen.

CLEANING UP CONTACT CATEGORIES

1. From the main Best Practice screen,
   select **Setup** > **Configuration** > **Lists**.

2. In the **Contact category** section, click **Clean Up**. The **Clean up categories** screen will appear.
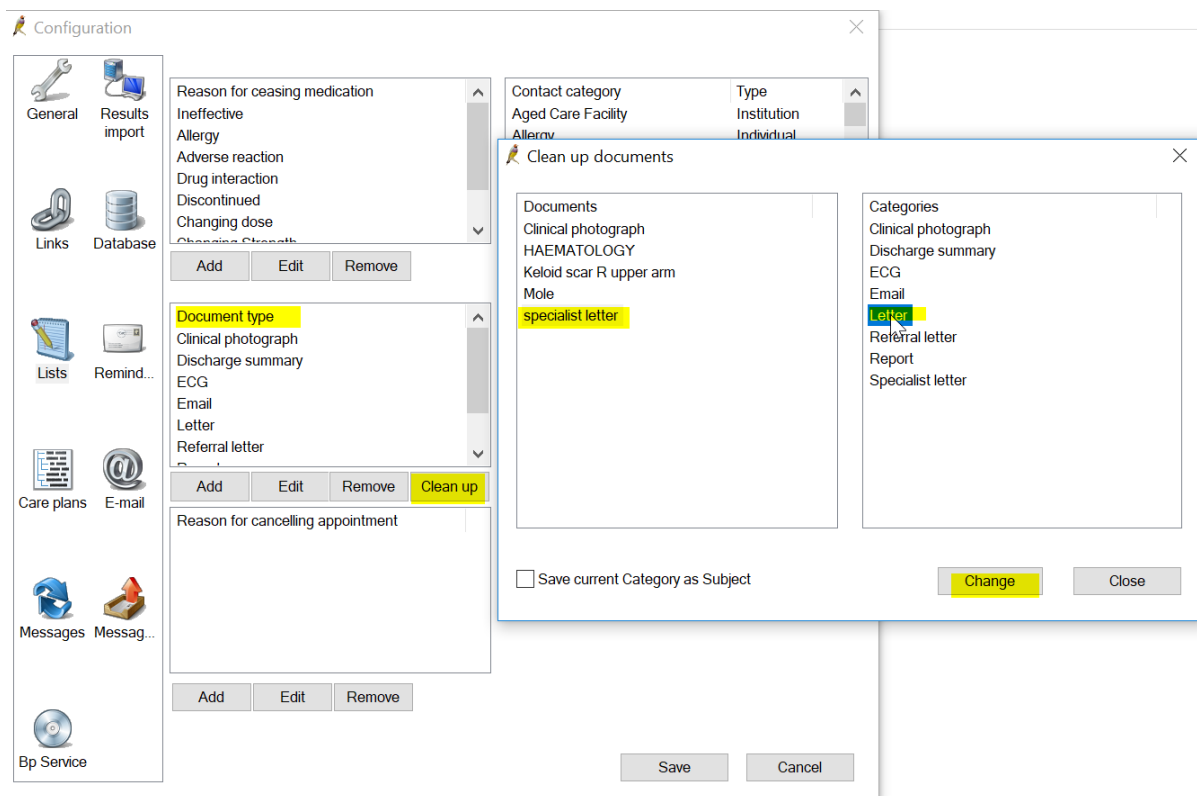

The left hand side shows all the contact categories that are used in **Contact** records: both entered as free text and from the coded **Category** drop-down.

The right hand side shows all the contact categories that have been added into the **Configuration** > **Lists** categories table.

3. Before you start the cleanup process, it is good practice to ensure that the **Categories** list contains only those categories that you feel are relevant for your clinic's use. Edit and remove unwanted categories from the **Configuration** > **Lists** screen.

4. To merge contacts, select the items on the left hand side that you want to merge into a category on the right hand side. Select multiple items by using Ctrl+Click.

5. Once the items are selected on the left hand side, select the item on the right you wish to merge them to.

6. Click **Change**. A prompt will display to ensure you wish to change the highlighted contact types to a category.

7. Make sure that you have the correct items selected and click **Yes** to merge.

8. Repeat steps 4–7 for any other contact categories you want to clean up. Click **Close** to return to the **Configuration** screen.

CLEANING UP DOCUMENT TYPES

1. From the main Best Practice screen,
   select **Setup** > **Configuration** > **Lists**.

2. In the **Document type** section, click **Clean Up**. The **Clean up documents** screen will appear.

The left hand side shows all the document types that are associated with documents within the database: both entered as free text and from the coded **document types** drop-down.
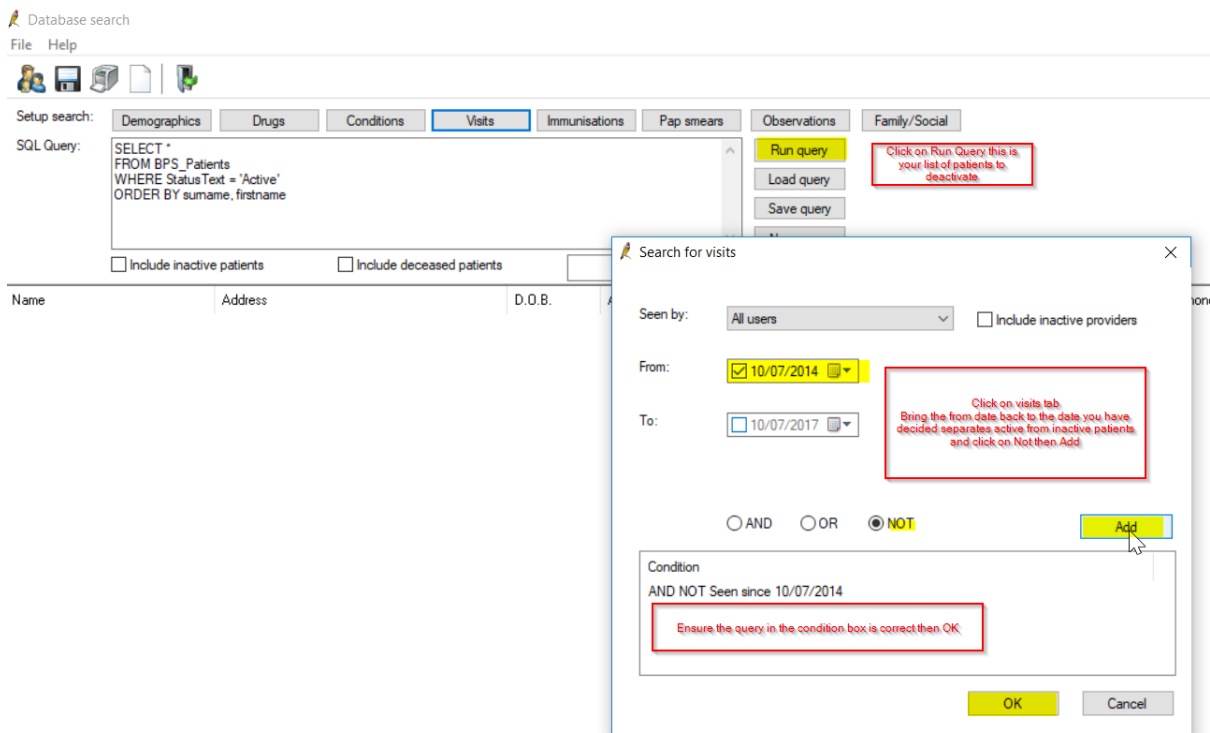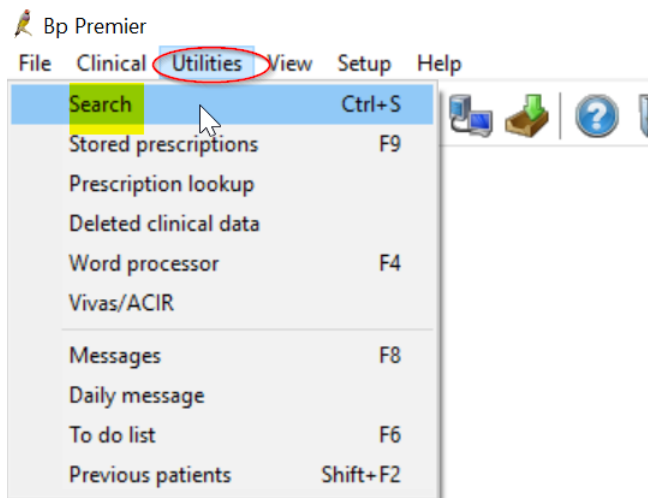
The right hand side shows all the Document Types that have been actually added into the **Configuration**> **Document types** table.

3. Before you start the cleanup process, it is good practice to ensure that the **Categories** contains only document types that you feel are relevant for your clinic's use. Edit and remove unwanted document categories from the **Configuration**> **Lists** screen.

4. To merge document categories, select the items on the left hand side that you want to merge into a category on the right hand side. Select multiple items by using Ctrl+Click.

5. Select **Save current Category as Subject** to save the left hand side document category as the subject of the merged document. This will ensure that documents are still labeled correctly.

6. Once the items are selected on the left hand side, select the item on the right you wish to merge them to.

7. Click **Change**. A prompt will display to ensure you wish to change the selected document types to a category.

8. Make sure that you have the correct items selected and click **Yes** to merge.

9. Repeat steps 4–8 for any other document categories you want to clean up. Click **Close** to return to the **Configuration** screen.

<u>Inactivate Patients in Best Practice</u>

Not in a patient, file open Utilities/Search

Setup search: | Demographics | Drugs | Conditions | Visits | Immunisations | Cervical screening | Observations | Family/Social |

SQL Query:
```
SELECT *
FROM BPS_Patients
WHERE StatusText = 'Active'
AND NOT InternalID IN (SELECT InternalID FROM Visits WHERE VisitDate >= '20160401' AND VisitDate <= '20190401' AND RecordStatus = 1)
ORDER BY surname, firstname
```

Run query
Load query
Save query
New query

☐ Include inactive patients   ☐ Include deceased patients

| Name | Address | D.O.B. | Age | Medicare No. | Medicare expiry | File No. | Home phone | W |

Database search

File   Help

Open
Save
Import

Print   F9
Labels
Mail merge
Add to reminders
Mark as inactive

Close   Ctrl+F4

Name   Address

Edit patient   ✕

Title:	Mast.	Health Identifier:	
Family name:	Abbott	HI Status:	
Given name:	Benjamin	Medicare No.	4133180467 IRN: 3 Expiry: 12/08
Middle name:	James	Pension/HCC No.:	Expiry: ☐ 10/07/2017
Preferred name:	Benjamin	Pension card type:	
Date of Birth:	☑ 26/01/2003 Age: 14 yrs	DVA No.:	Conditions
Sex:	Male	Safety Net No.:	
Ethnicity:		Record No.:	103 Patient ID: 3
Address Line 1:	12 John	Usual doctor:	Dr Frederick Findacure
Address Line 2:		Deny access to other users	☐
City/Suburb:	Albany Creek Postcode: 4035	Usual visit type:	
Postal Address:		Usual account:	Schedule fee
City/Suburb:	Postcode:	Health Ins. Fund:	Medihealthy
Home phone:	07 50505050 Work phone:	Health Ins. No.:	123123123 Expiry: ☐ 10/07/2017
Mobile phone:	Contact via:	Religion:	Baptist
	☐ Consent to SMS reminder	Head of family:	Alan Abbott Set
E-mail:		Next of kin:	Alan Abbott Set
General notes:		Emergency contact:	Set
		Occupation:	Set
		☐ Registered for CTG PBS Co-payment relief
Appointment notes:		☑ Inactive ☐ Deceased
		Date of death: ☐ 10/07/2017 Cause
		Referral details Bank account
☐ Update address of all family members		Medicare/DVA eligibility check
☐ Update address of all currently at original address		Save Cancel

* These name fields are used for Health Identifier lookups.

The patient can be made active again put a tick in the box when searching (inactive patients show in red) and can be made active again by changing the status to active.

Correspondence In:

From Correspondence In add reminders, past history, add smear results and update medications

Go to Current Rx then add medications click on Mediation started by specialist or elsewhere