

# Database Cleansing & Maintenance

## Marking patients as 'inactive' in bulk

You may wish to search your patient database and mark those patients who you have not seen for many years as inactive. Marking patients as inactive is a relatively simple process as is reactivating them again.

By marking patients as inactive you are removing them from view when you search the database, their information is not included in standard patient searches and you won't send them recall letters (unless you choose to).

1. From the **Main Screen**, select **Search**.
2. **Patient**
3. **Not seen since** (you can type directly on top of the year date to change).
4. **Search**
5. When the list appears click on the **'Inactivate Patients' button** from the bottom left of the screen.
6. **Yes** to confirm the inactivation.

The screenshot shows the 'Patient Search' window with various filters. The 'Seen By' dropdown is set to 'Any doctor'. The 'Not seen since' date is set to '9/12/2009'. The search criteria include 'Age greater than or equal to', 'Age less than or equal to', 'Sex' (All, Female, Male), 'Pregnant' (Yes, No, All), 'ATSI' (Aboriginal, Torres Strait Islander, etc.), 'Smoker' (City, Never Smoked, Ex-Smoker), 'Occupation', 'Drug/Condition' (Currently taking drug, etc.), and 'Sign'. The search results show 'All patients who have not been seen since 9/12/2009'.

### Tip:

The 4<sup>th</sup> RACGP Standards of Accreditation view our 'active' patients as those we have seen 3 times in the past 2 years. Use the search function to identify 'inactive' patients. Do a search for all patients not seen by any doctor for two years. Aim to have completed health summaries for 'active' patients.

## Marking patients as inactive individually

If one patient or family inform you they are moving away you may wish to individually inactivate the patient record/s.

To mark patients as inactive from the Main Screen:

1. Go to the **Main Screen, Open** (or F2).
2. **Search for the patient** whom you wish to mark as inactive.
3. From the patient list **click once to highlight the inactive patient** then click on the **Delete** key.
4. Choose **'Mark as Inactive'**.



## Exercise – Marking patients as inactive

1. Search for David and Penny Anderson's patient records.
2. Mark both as inactive.



## Exercise – Searching the database

1. Print a list of all patients who have not been seen by any doctor for two years.

### Viewing and reactivating 'inactive' patient records

When you re-open the 'inactive' patient file it will automatically reactivate them however when they are marked as 'inactive' they will not be instantly visible in a general patient search. To view the record in order to open and 'reactivate':

1. Go to the **Main Screen** and click on **Open** (or F2).
2. **Enter the first few letters of the patient's surname** you are searching for.
3. **Tick the box marked 'Include inactive patients'** (the inactive patients will list in red).
4. Click to highlight the relevant patient and click OK to open the patient file. Opening the patient file automatically reactivates them.

Select patient from list

Enter patient surname or record number  
A

Include inactive patients

Name	Age	Chart No.	Address	D.O.B.
Anderson, David	53 yrs	345	61 Wallace St. Melbourne 3000	04/01/1955
Anderson, Penny	24 yrs	345677	61 Wallace St. Melbourne 3000	04/07/1983
Andrews, Anna	9 yrs	00000	2 Kennedy Rd. Demo Town 4523	08/12/1998
Andrews, Dylan	10 wks	00113	2 Kennedy Rd. Demotown 1234	01/03/2008
Andrews, Fred	85 yrs		4 Best St. St. Kilda 3107	23/02/1923
Andrews, Graham	8 yrs		2 Kennedy Rd. Demo Town 4523	22/07/1999
Andrews, Heather	44 yrs		2 Kennedy Rd. Demotown 1234	12/05/1963
Andrews, Jennifer S.	38 yrs	107	2 Kennedy Rd. Demo Town 4523	20/04/1970
Andrews, John	52 yrs	105	2 Kennedy Rd. Demo Town 4523	17/06/1955
Andrews, Julie	52 yrs	345247	5 Jefferson St. Parkville 3256	03/03/1956
Andrews, Maureen	84 yrs	345644	4 Best St. St. Kilda 3107	23/06/1923
Andrews, Max	6 yrs		2 Kennedy Rd. Demo Town 4523	13/09/2001
Andrews, Melissa	15 yrs	345645	5 Jefferson St. Parkville 3156	19/01/1993
Andrews, Michael	54 yrs		23 Tanner St. Bondi 2367	08/05/1954
Andrews, Sally	9 yrs		21 Best St. Pll Land 3123	12/05/1998

OK Add New Delete Edit Merge Close

#### Tip:

Just because a patient hasn't presented in 2 or more years of course does not mean they are not your patient, so choose whatever timeframe you like when inactivating and Receptionists must be diligent to always tick 'Include inactive patients' when making appointments so as to minimise the possibility of creating duplicate files.



## Exercise – Reactivating Inactive patient records

1. Search for Penny and David Anderson's patient records.
2. Tick the box to Include inactive patients.
3. Open each patient record to reactivate them.

## Designing a Correspondence Management 'System'

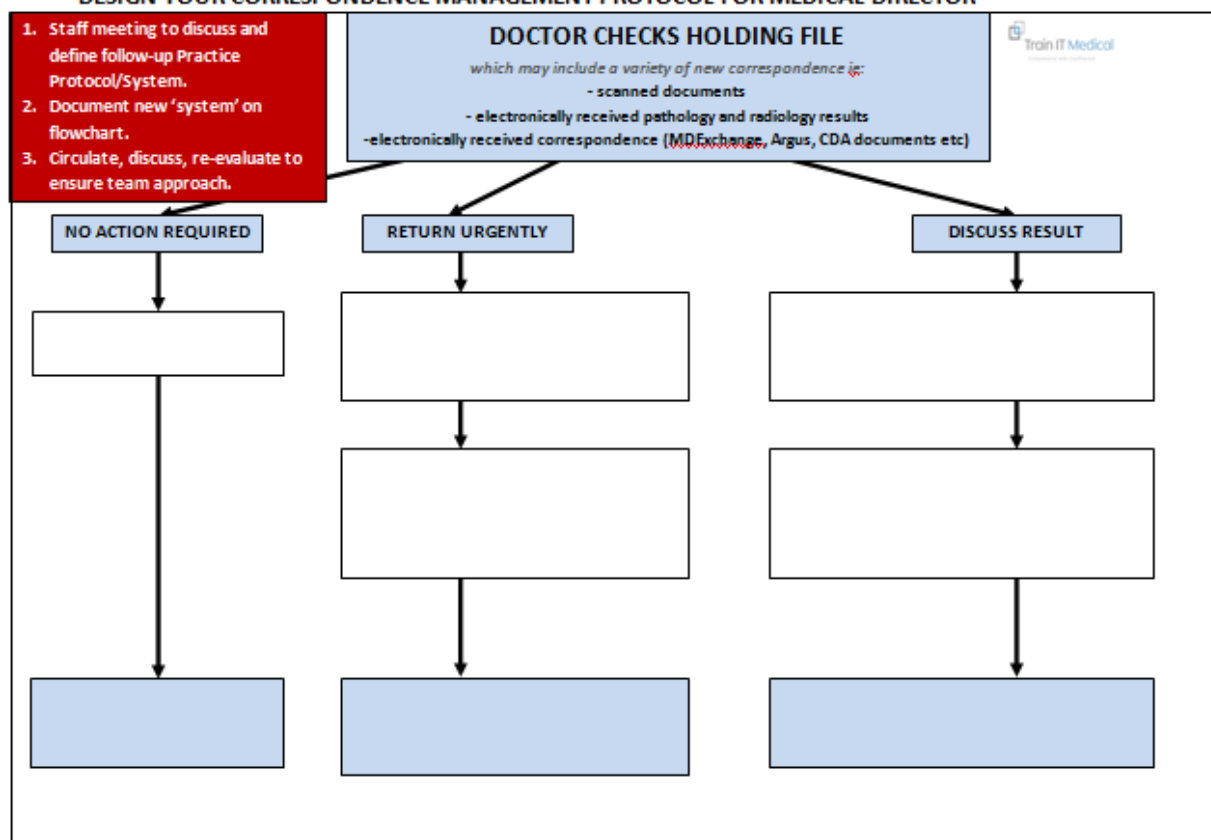
A clear 'system' should be designed for every individual practice with all staff understanding their role and processes in following up patient results/correspondence.

System for Follow up of Tests and Results Criterion 1.5.3

**“Our practice team can describe how we follow up and recall patients with clinically significant tests and results”**

(RACGP Standards for General Practice 4th edition)

### DESIGN YOUR CORRESPONDENCE MANAGEMENT PROTOCOL FOR MEDICAL DIRECTOR



### Tip:

This blank flowchart can be used to prompt a practice 'system design'. It is ideal within a practice to design, document and follow one system for patient follow-up. A team meeting to evaluate the system should also be encouraged to build confidence in the practice system as well as introducing quality improvements and encourage investment in the processes. Blank flowchart and samples available for free download from [www.trainitmedical.com.au](http://www.trainitmedical.com.au)

## The Holding File Workflow

The Holding File should be checked regularly (F5) and all correspondence actioned.

The process of 'Actioning' removes the correspondence from the Holding File and stores it in the patient record and also adds to the 'Actioned Items' list for follow-up by staff if required.

### Tip:

For doctors you could set the preference in Options (Main Screen > Tools > Options) to 'start program in the Holding File'. This means when logging on you will be immediately presented with any new correspondence.

1. From the Main Menu or Patient Record click on **Correspondence** or **F5**
2. **Check Holding File**
3. **Select Practitioner name.**

The screenshot shows the 'Medical Director 3.54c - Holding File' window. The top part displays a table of correspondence records with columns for Date Collected, Date Requested, Result, Patient, Subject, Description, Doctor, Provider, Location, Type, Date Deleted, and Source. The bottom part shows a patient record form titled 'SCG ECHOCARDIOGRAM WORKSHEET' with fields for Name, Age, BSA, Lab, Weight, and BP. The 'Action' button at the bottom of the form is highlighted with a red box.

Date Collected	Date Requested	Result	Patient	Subject	Description	Doctor	Provider	Location	Type	Date Deleted	Source	
23/11/2012			ANDREWS, FRED	Halter ECG		Dr Katrina Otto			ECG	23/11/2012	Imported	
01/11/2012			ANDREWS, FRED	Duodenal Ulcer		Dr Katrina Otto			Document	01/11/2012	Imported	
14/10/2010			ANDREWS, FRED	Halter ECG Report		Dr Katrina Otto			Document	23/11/2012	Imported	
01/11/2012			ANDREWS, GRAHAM JOHN	Diabetes in Diasthagau		Dr Katrina Otto			Document	01/11/2012	Imported	
13/01/2011	13/01/2011		DILLON, JOE	MR JOE DILLON		DR KATRINA OTTO	MDX1412B		Document	Specialist Letter	13/01/2011	SDI
13/01/2011	13/01/2011		DILLON, JOE	MR JOE DILLON		DR KATRINA OTTO	MDX1412B		Document	Specialist Letter	13/01/2011	SDI
23/07/2004	23/07/2004		HAWKES, JEFF TEST	HPV DNA		HELLO COMPUTER DEPARTMENT	SDS PATHOLOGY		Result	Pathology Results	10/01/2011	SDI
23/07/2004	23/07/2004		HAWKES, JEFF TEST	HPV DNA		HELLO COMPUTER DEPARTMENT	SDS PATHOLOGY		Result	Pathology Results	10/01/2011	SDI
23/07/2004	23/07/2004		HAWKES, JEFF TEST	HPV DNA		HELLO COMPUTER DEPARTMENT	SDS PATHOLOGY		Result	Pathology Results	10/01/2011	SDI
23/07/2004	23/07/2004		HAWKES, JEFF TEST	HPV DNA		HELLO COMPUTER DEPARTMENT	SDS PATHOLOGY		Result	Pathology Results	10/01/2011	SDI
01/09/2006	01/09/2006		PATIENT, TEST32E	HR		HELLO COMPUTER DEPARTMENT	SDS PATHOLOGY		Result	Pathology Results	10/01/2011	SDI

Zoom: Page Width | Open Externally

**SCG ECHOCARDIOGRAM WORKSHEET**

Name: [PatName]  
Age: [PatAge]  
BSA: #

Lab: #  
Weight: #kg  
BP: # mmHg

Previous | Next | Reassign Patient | Reassign Doctor | No Action | **Action** | Add Recall | Edit Patient | Open Record | Print | View Signature | Audit History

4. Highlight the result and select '**Action**' from the bottom of the screen.
5. Choose an **Action from the list**, add an Individualised **Comment** or choose from the list of Comments previously saved as required.