Database Cleansing

Checklist for Best Practice users

Area for Improvement	Not sure if this is a problem area? Do you notice any of the following?	What to do:	Tick if working well
Past History List	Multiple entries of same condition in past history section of patient record Insignificant items in past history list but unticked for 'Summary' Active conditions marked as inactive (or viceversa) Conditions in the past history list have been free-text typed, instead of coded.	From the Past History section Add / Edit / Delete to update and ensure accuracy of this area. Clean-up uncoded diagnoses in BP Utilities > Clean up History. Replace uncoded items with coded selections from the picklist. Code all new diagnoses.	
Medication List	Inaccurate medications listed in Current Rx section of patient record. Inaccurate or missing medications printing on referrals, care plans, summaries etc.	Delete medications that are no longer current from Current Rx by selecting medication from the list and delete on your keyboard Ensure 'once only' is selected when prescribing short-term medications	
Reminders	Duplicate and/or unclear reasons on the reminder list Old or irrelevant reminders in patient records.	Clean up the reminder list (Main screen) Setup > Configuration > Add/Edit/Remove. Merge duplicate reminder reasons (Main screen) Setup > Configuration > Cleanup. Generate a list of all 'old' reminders: 1) Main Screen > Clinical > Reminders > (select a specified date range). Delete/update reminders for patients. 2) Main Screen > Clinical > Reminder > View > Sent Reminders > Update/delete reminders for patients.	
Outstanding Actions	Outstanding actions appear on top of patient record with outdated information	View Outstanding Actions list (Main Screen > Clinical > Actions > Mark as performed or delete	

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These sheets are designed to supplement Train IT Medical training delivery.
To organise further training via onsite, online or course delivery please contact us. For more free resources see www.trainitmedical.com.au.

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Inbox Follow-up	Results not marked as Given / no audit trail of patient follow-up/contact.	Check inbox follow-up area (Main screen) Clinical > Follow-up Inbox. Check there are no results that needed follow-up that are still on this list (filter by action eg. Doctor to advise). If already followed up 'Mark Result as Contacted' or 'Mark Result as given' as this removes them from this follow-up list. . Revise or design practice Inbox management system. Check list of patients marked as contacted whose results have not been marked as given. (Main screen) View > Investigation Reports > Tick 'include results that the patient has been contacted about' > choose a date range > 'Mark result as given' or 'Record Note' to detail progress with this result/document.	
Investigation Requests	Check Investigation Requests (Main screen) View > Investigation Requests.	Check Investigation Requests list and select mark as returned for that have been returned, follow-up any that haven't as appropriate or delete request if in error or no longer relevant.	
Lists	**Contacts: -** Duplicate or inaccurate contact categories **Document Types:** Inaccurate spelling or duplicate types	Main Screen > Setup > Configuration > Lists > Add/Edit/Delete or 'Clean up' to merge duplicates.	
Duplicate records	Duplicate patient records	Merge duplicates – Main Screen > View > Patients – Search for the patient and click to highlight on list > Edit > Merge > select duplicate file (please ensure they really are different patients!).	
Archiving old records	Patients appear on your list who you have not seen for many years	Inactivate – Main Screen > Utilities > Search > Visits > Enter a year in the 'From' date (eg 3 years) > Select 'Not' > Add > OK > Run Query > File > Mark as Inactive.	
Deceasing records	Deceased patients are not marked as deceased.	Decease records. Main screen > Open – search for deceased patient file, highlight their name from the list and View details. Select deceased from bottom right of this screen (you don't need to add date & cause if unknown).	

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