



# MEDICAL DIRECTOR DATA CLEANSING GUIDE

**Quality Improvement Program**

**July 2019**

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### QUALITY IMPROVEMENT IN PRIMARY CARE MEDICAL DIRECTOR HOW TO GUIDE

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#### DATA CLEANSING

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### 1. How to Inactivate Patients

#### INACTIVATING PATIENTS - BULK INACTIVATION

1. Main screen (ensure no patient files open)  
Click Search and from drop down select Patient
2. Tick Not seen since and insert date. Click Search

The screenshot shows the 'Patient Search' window with the following settings:

- Age:** Age greater than or equal to: [ ]  
Age less than or equal to: [ ]
- Gender:** ☒ All, ☐ Not Stated, ☐ Male, ☐ Female, ☐ Intersex/Other
- Transgender:** ☒ All, ☐ Yes, ☐ No
- Pregnant:** ☒ All, ☐ Yes, ☐ No
- Other demographic criteria:** [ ]
- ATSI:** ☐ Not stated/inadequately described, ☐ Aboriginal, ☐ Torres Strait Islander, ☐ Aboriginal and Torres Strait Islander, ☐ Neither Aboriginal nor Torres Strait Islander
- Smoker:** ☐ Smoker >= [ ] /day, ☐ Never Smoked, ☐ Ex-Smoker
- Drug/Condition:** ☒ Currently taking drug, ☐ Currently taking drug from class, ☐ Previous script for drug, ☐ Condition, ☐ Symptom, ☐ Sign. [ ] OR [ ] NOT. [Add to search criteria]
- Seen By:** Any doctor [ ] From: 1/12/2017 To: 1/12/2017
- Not seen since:** ☒ 1/12/2015
- Custom Fields:** Custom Field 1, Custom Field 2, Custom Field 3
- Search Results:** All patients who have not been seen since 1/12/2015
- Buttons:** Search, Clear, Close

3. Select Inactivate Patients (this will inactivate all patients).

Surname	First name	Address	Preferred Address	D.O.B.	Gender	Transgender	Phone	Bus. Phone	Mob. Phone	Medicare No.
Nerk	Sally	12 Kings Court, Bundaberg QLD 4670	Residential	22/07/1998	F	N				6073868866
Nerk	Fred	12 Kings Court, Bundaberg QLD 4670	Residential	12/05/1955	M	N				6073868866

At the bottom of the window are buttons: Inactivate Patients, Open, Add Recall, Save, Print, Labels, Mail merge, Close.

4. To confirm, select Yes

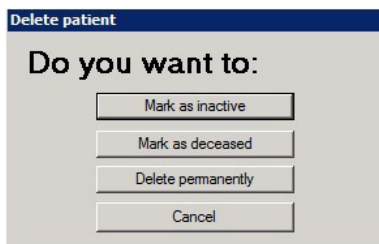
## INACTIVATING PATIENTS - INDIVIDUALLY

1. Main screen, Open and search patient name (do not open file). Highlight name and click Delete.

Name	Age	Gender	Chart Number	Address	Phone Number
Anderson, David	62yrs ...	M		61 Wallace Street, Bundaberg 4670	
Anderson, Penny	24yrs ...	F		61 Wallace Street, Bundaberg 4670	

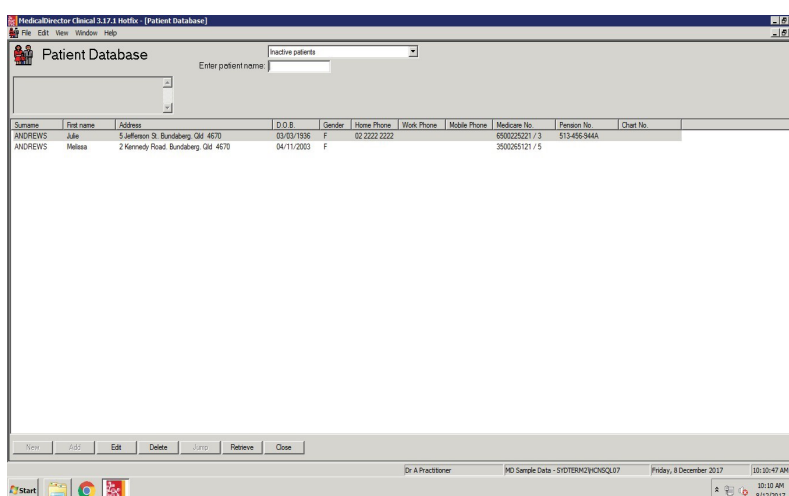
At the bottom are buttons: OK, Add, New, Delete, Edit, Merge, Close. The status is shown as 'Active'.

2. Select Mark as inactive (note: this list will not be permanently deleted)



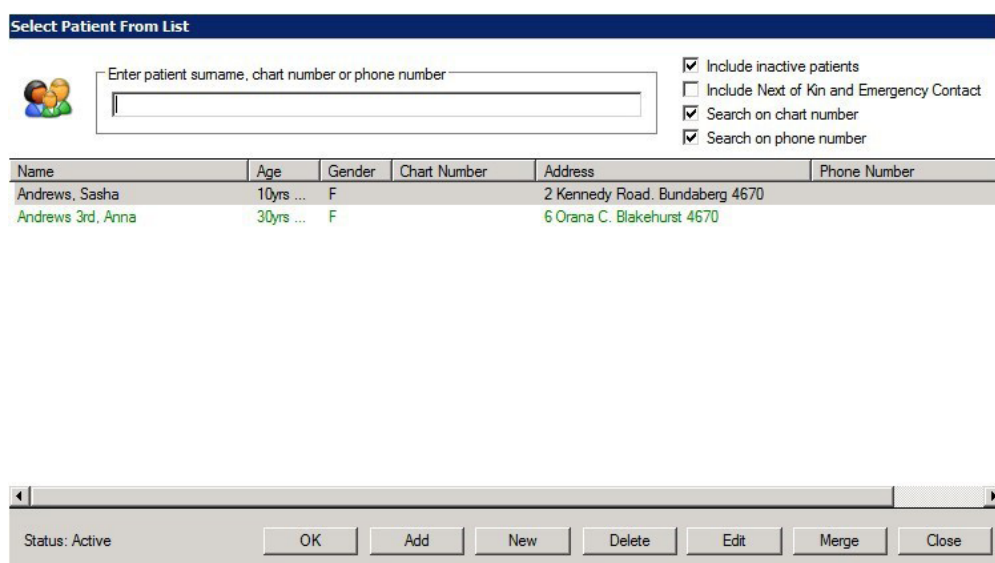
### HOW TO VIEW INACTIVE PATIENTS

1. From main menu select patients, and select list
2. Click current patients by name and select inactive patients from dropdown



### HOW TO ACTIVATE INACTIVE PATIENT

1. From main screen, select open and tick include inactive patients  
Once the inactive patient file is opened, it automatically reactivates it



### 2. How to merge duplicate patient files

1. Main menu, select Open and search patient name
2. Highlight patient file you wish to keep and click Merge

Select Patient From List

Enter patient surname, chart number or phone number  
ANDREWS, ANN

☐ Include inactive patients  
☒ Include Next of Kin and Emergency Contact  
☒ Search on chart number  
☒ Search on phone number

Name	Age	Gender	Chart Number	Address	Phone Number
Andrews, Anna	30yrs ...	F		6 Orana C. Bundaberg 4670	
Andrews Duplicate, Anna	30yrs ...	F		6 Orana C. Bundaberg 4670	

Status: Active

OK Add New Delete Edit Merge Close

3. Highlight patient record you wish to merge in the record you previously selected Click Next

Merge Patients

Medical Director CLINICAL

Select patient to merge

Surname or Record Number: AND,A

Name	External ID	Source	D.O.B.	Gender	Ad
Andrews, Anna	ANDRANNA		12/05/1987	F	6 C
Andrews Duplicate, Anna	ANDRANNA!		12/05/1987	F	6 C

View Demographics

Status: Active

< Back Next > Cancel

4. Select Next to confirm the merge process

Merge Patients

Medical Director CLINICAL

Ready!

Are you sure you want to merge these patients?

Click the Next button to start the merge process.

< Back Next > Cancel

### 3. How to record allergies

1. In patient file, double click Allergies & Adverse reactions white box (as outlined)

#	Drug name	Strength	Dose	Freq	Instructions	Route	Qty	R. Int	Rpts	Elapse	\$	Reg 24	PCEHR consent	Purpose	Last script
1	PANADOL TABLET	500mg		q.4h.		Oral	12	0	24/09/2017	\$	No	Not enabled			
2	PANADOL TABLET	500mg				Oral	12	0	24/09/2017	\$	No	Not enabled			
3	PANADOL TABLET	500mg	500	midday	p.r.n.	Oral	12	0	30/08/2017	\$	No	Not enabled			
4	PANADOL TABLET	500mg		nocte	+p.r.n.	Oral	12	0	28/09/2017	\$	No	Not enabled			
5	VENTOLIN CFC-FREE INHALER	100mcg/dose				Inhale	2*200 ...	5			P	No	Not enabled		10/12/2012

2. If the patient has No Known Allergies/Adverse Reactions click on this box and click Save.

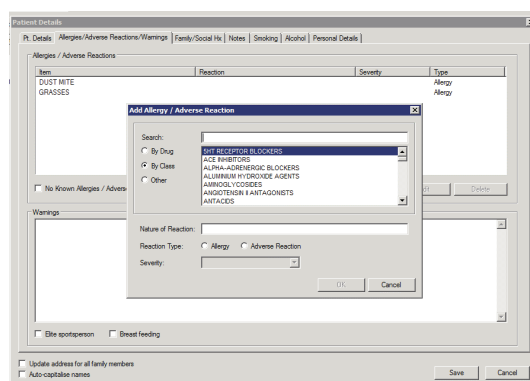
Item	Reaction	Severity	Type
DUST MITE			Allergy
GRASSES			Allergy

☐ No Known Allergies / Adverse Reactions

Buttons: Add, Edit, Delete, Save, Cancel

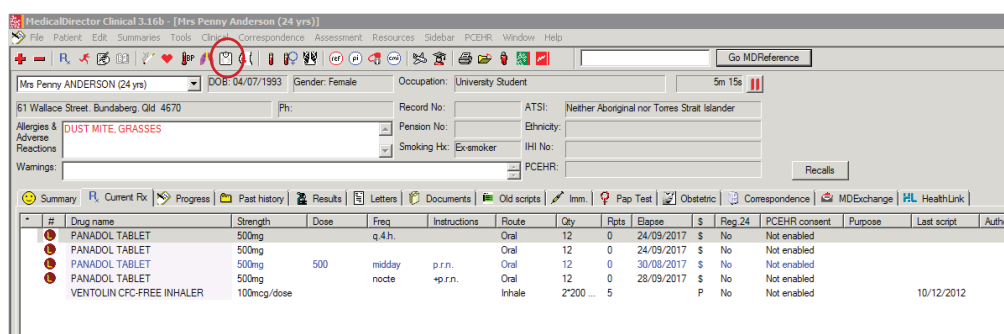
3. If the patient has a known allergy, select **Add** to record the patient allergies. Select **allergy** from coded list and fill in **Nature of Reaction**, **Reason Type** and **Severity**. Click **OK & Save**. Repeat this step if the patient has multiple allergies.



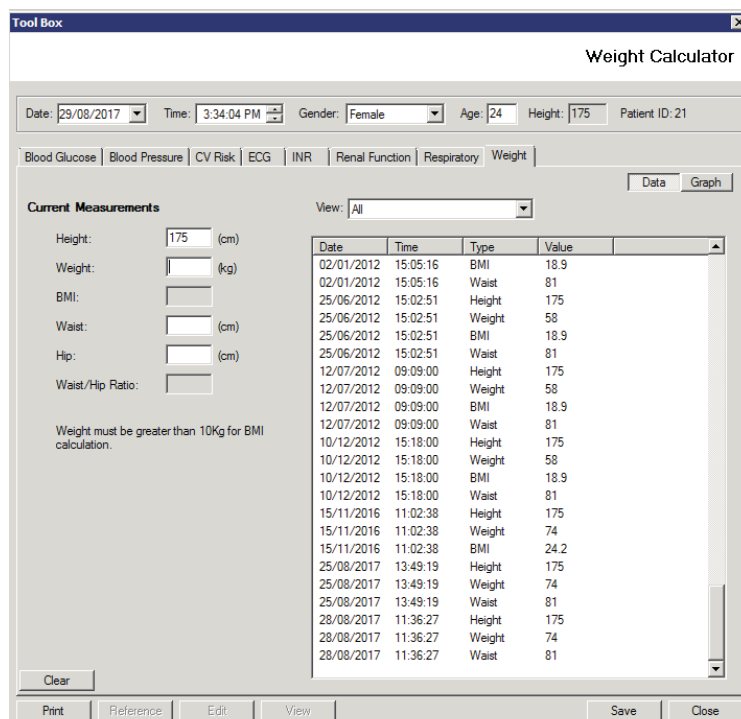


### 4. How to Record Height, Weight, Waist and Blood Pressure

1. Open patient file and select the scales icon



2. Fill in patient's Height, Weight & Waist measurements





3. Click on Blood Pressure tab to enter BP and click Save

**Blood Pressure**

Date: 29/08/2017 Time: 3:34:04 PM Gender: Female Age: 24 Height: 175 Patient ID: 21

Blood Glucose | **Blood Pressure** | CV Risk | ECG | INR | Renal Function | Respiratory | Weight

Device | Manual

Current Measurements View: All

Blood Pressure Cuff Location: Unspecified

Sitting:  /  /  Systolic / Diastolic / Pulse

Standing:  /  /

Lying:  /  /

Date	Time	Location	Type	BP	Pulse	Rhythm
19/06/2007	11:15:00	Unspecif...	Sitting	130/90		
14/01/2008	08:31:00	Unspecif...	Sitting	130/90		
14/04/2008	08:31:00	Unspecif...	Sitting	120/70		
10/06/2008	15:16:46	Unspecif...	Sitting	130/90	75	
14/01/2009	08:31:00	Unspecif...	Sitting	141/87	87	
20/09/2009	11:42:00	Unspecif...	Sitting	160/99		
01/11/2009	10:49:00	Unspecif...	Sitting	137/90	81	
17/07/2010	11:29:00	Unspecif...	Sitting	130/90		
04/09/2010	10:19:00	Unspecif...	Sitting	110/60	60	
07/10/2010	13:33:00	Unspecif...	Sitting	115/70	68	
11/11/2010	10:24:00	Unspecif...	Sitting	120/70	60	
30/12/2010	09:24:00	Unspecif...	Sitting	110/70		
04/01/2011	17:31:00	Unspecif...	Sitting	120/80	60	
24/02/2011	10:49:00	Unspecif...	Sitting	120/80	60	
24/02/2011	10:51:00	Unspecif...	Sitting	130/85	60	
22/10/2011	13:35:00	Unspecif...	Sitting	120/80	60	
02/01/2012	15:04:50	Unspecif...	Sitting	120/80	60	
25/06/2012	15:02:59	Unspecif...	Sitting	120/80	60	
12/07/2012	09:09:00	Unspecif...	Sitting	115/85	60	
15/11/2016	11:02:01	Unspecif...	Sitting	115/87	81	Regul
25/08/2017	13:49:19	Unspecif...	Sitting	115/87		
28/08/2017	11:36:27	Unspecif...	Sitting	115/87		

Clear Record Print Reference Edit View Save Close

## 5. To add in a coded diagnosis in Past History

1. Open patient file and select Past History and + to add
2. Search condition and select from the list. Click OK

Past history Results Letters Documents Old scripts

Side Status Summ

ion Inactive Yes

**New History Item**

Year: 2017 Date: 13/11/2017

Condition

☒ Pick from list (coded)

### TO ADD A CODED DIAGNOSIS WHEN ADDING A PRESCRIBED MEDICATION

1. Open patient file
2. Add a prescribed medication using Current Rx tab - Fill in details
3. The last step will request - Enter reason for medication
4. Enter first few letters in Pick from list (coded) and select from the options.
5. Tick Save in past medical history-Unless condition is in existing past history (green box below) to avoid double up
6. Tick Save as reason for contact-if applicable
7. Click Ok
- 8.

**Note:** In cases where the condition you've searched is not on the list, select the condition that is the closest match and use the comment section to fill in the details. As seen below

### HOW TO AVOID DUPLICATE CONDITIONS IN PAST HISTORY WHEN PRESCRIBING MEDICATIONS:

1. Main screen, Tools and select Options from dropdown
2. Select Prescribing tab
3. Untick Save in the past medical history and preselect Save as reason for contact. Click Save.