Cleaning up uncoded and free text data

Bp Premier offers data cleanup utilities that can merge:

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

These functions are usually required when clinical data has been imported from another application by a conversion utility. Many other packages allow users to enter free text descriptions, which can cause inconsistent data. Bp Premier's cleanup functions map free text items to a coded item that your practice uses as a standard.
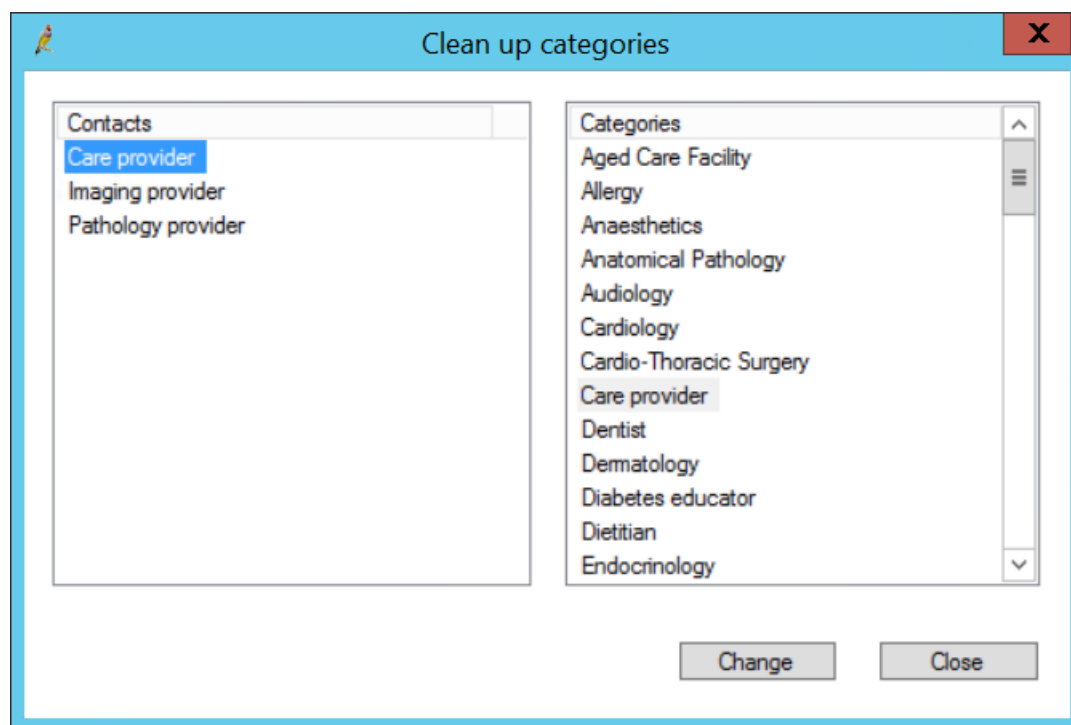
Clean up contact categories

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.

Clean 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.
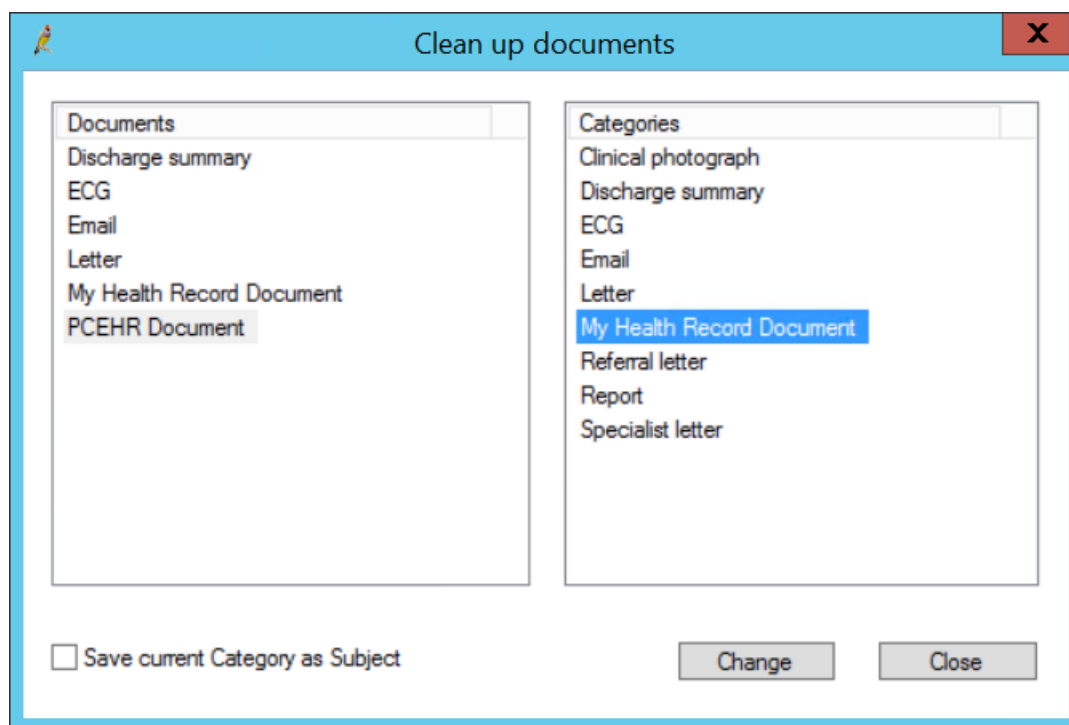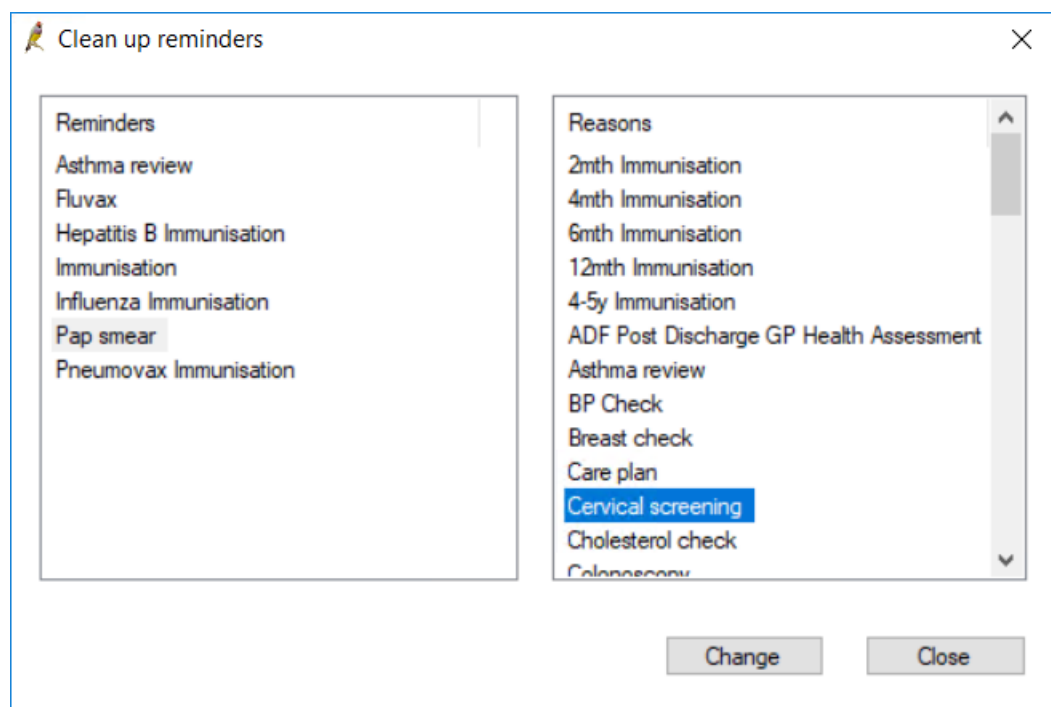
The left hand side shows all the document types that are associated with documents within the database: both entered as free text and from the coded **document types** drop-down.

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.

Clean up reminder reasons

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 cleanup 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. 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.

Clean up uncoded Past History items

You can clean up uncoded conditions that have been recorded in the **Past History** section of Best Practice. Cleaning up uncoded items makes it easier to perform database searches and manage third-party clinical audit tools.

Past history cleanup 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 cleanup 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 **Cleanup history** icon. The **Past History cleanup** screen will appear.

The **Uncoded 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 uncoded items you want to clean up. Click **Close** to close the **Past History cleanup** screen.