

Database Clean-up Work Options

During quiet times in a practice's day it is a good idea to clean up data and do some setup work that you don't always get a chance to do. Below are some guidelines to an array of the things that will make the program cleaner to use and provide extra information about your clients and patients that can help with analysis later and stop some frustrations in your day-to-day work.

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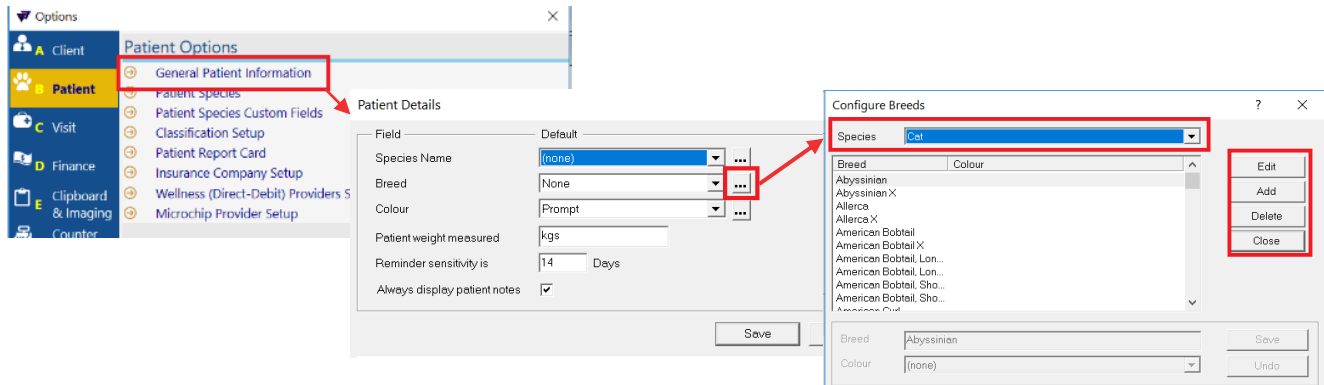
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*** Note:** These options are not available to practices that are [Centrally aligned](#) or are on [RxPerformance](#) (formerly performance pack).

Patient Cleanup

Patient Breeds*

- Navigate to **Options & Setup > B. Patient > General Patient Information.**
- Click on the 3 dots on the breed line.
- Choose a species and a full list of breeds for that species displays.

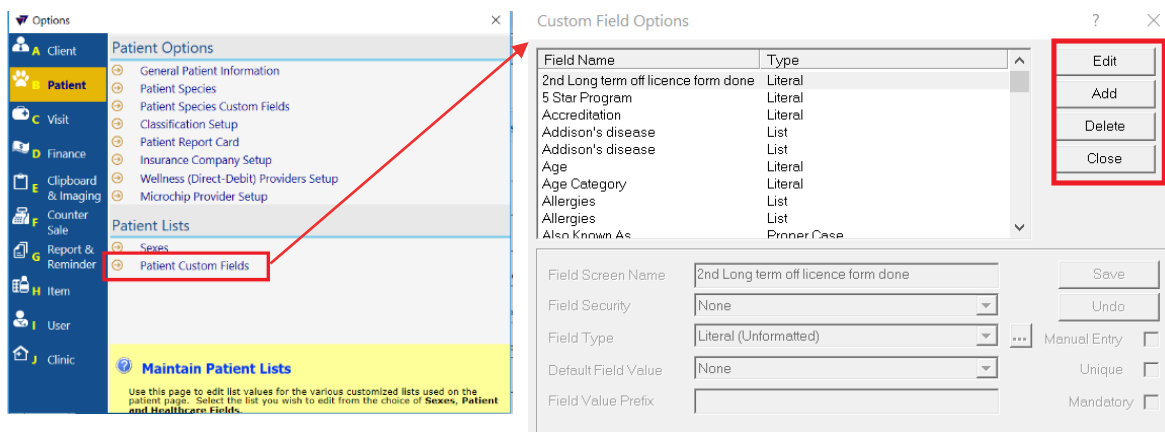


- Go through the list and edit to change the selected breed or delete to remove a breed.
- If the breed you are trying to delete is already selected on a patient, then the program will give you an option to merge with another breed name instead of deleting the record entirely.

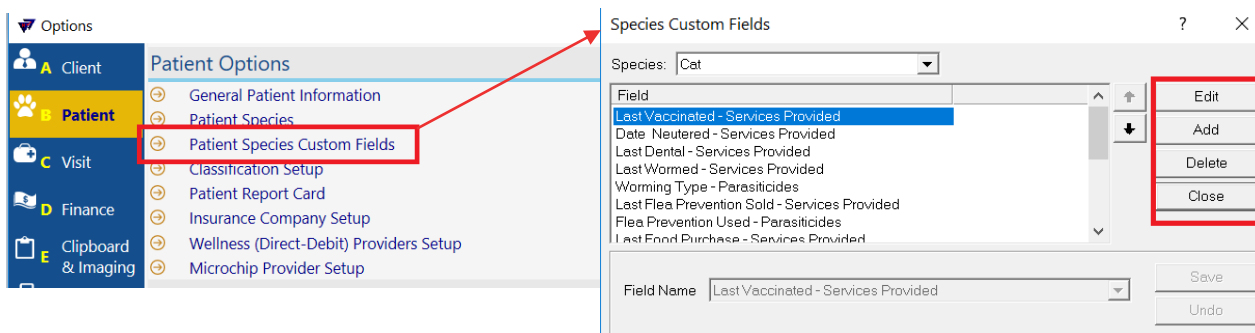
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Patient Custom Fields*

- Navigate to **Options & Setup > B. Patient > Patient Custom Fields.**



- Use this to **add** new custom fields, **edit** existing fields or **delete** existing fields
- If you choose to delete a field, and that field has been used, it will give you an option to update it to a new field
- Go to Patient Species Custom Fields

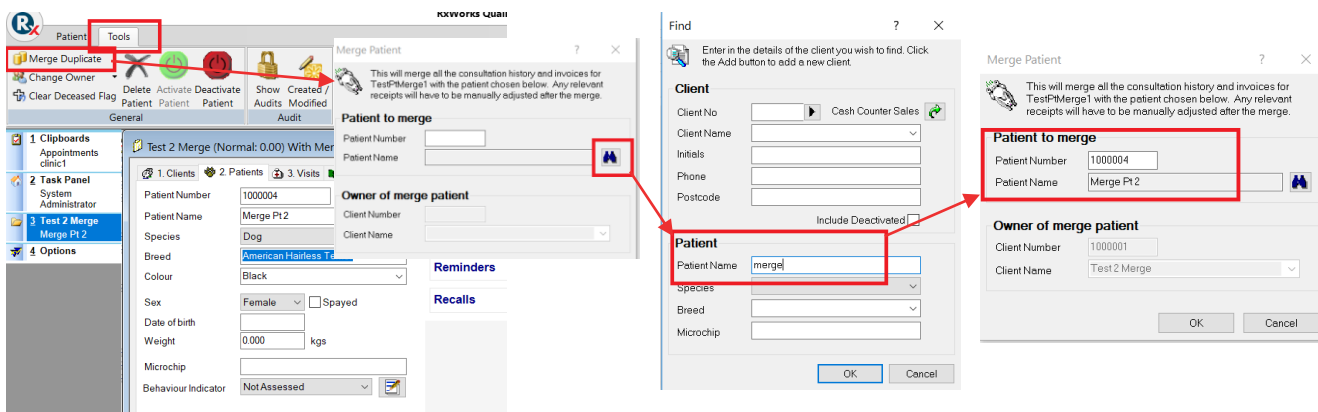


- Choose a Species
- Here you can **add**, **edit** or **delete** the fields for that specific Species

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Merge Duplicate Patients

- From the Patient's Work Area of the patient you wanted merged *from* (source), Go to **Tools > Merge Duplicate**.
- In the merge patient window enter the **Patient Number** or use the binocular icon to search for the patient you want merged *to* (target).



- Click **OK**.
- The **Merged From** patient will be deleted and their visits will be added to the **Merged To** patient.

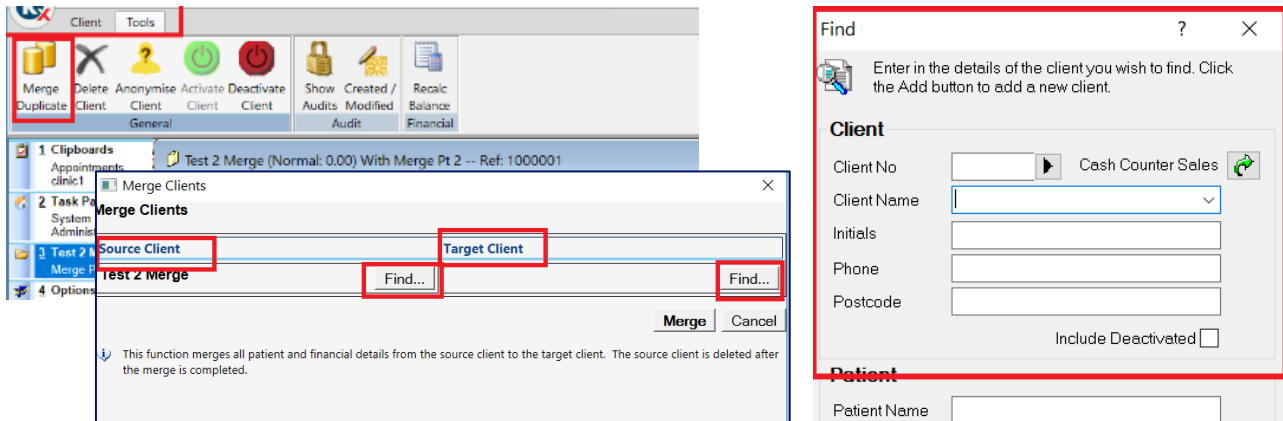
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Client Cleanup

Merge Duplicate Clients

- Record details of Client you want to merge *to* (target)
- Go the client you want merged *from* (source)
- Go to **Tools > Merge Duplicate**
- In pop-up window the client you were on will be the source client. You can adjust this by using the **Find...** button

- Under **Target Client** use **Find...** to select the client you wanted to merge *to*.



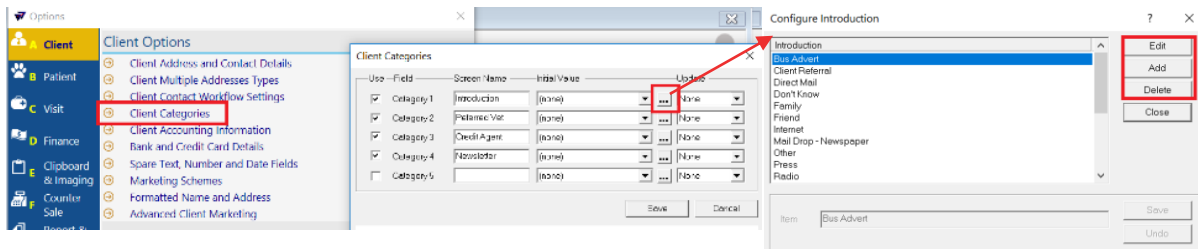
- Once both source and targets are selected, click **Merge** and the program will merge them together.
- The Source client will be deleted. All visits and the patient will be transferred to the target client.
- Once you have merged two client you can then merge duplicated patients where necessary.

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Setup Client Categories

Use client categories to classify your clients and run reports on them.

- Navigate to **Options & Setup > A. Client > Client Categories**
- Choose a category to edit and click on the 3 dots at the end of the line
- Choose to **add** or **edit** or **delete** entries in the list
- If you have an unused Category, tick the box and add a new category then press on the 3 dots to proceed to creating a list.

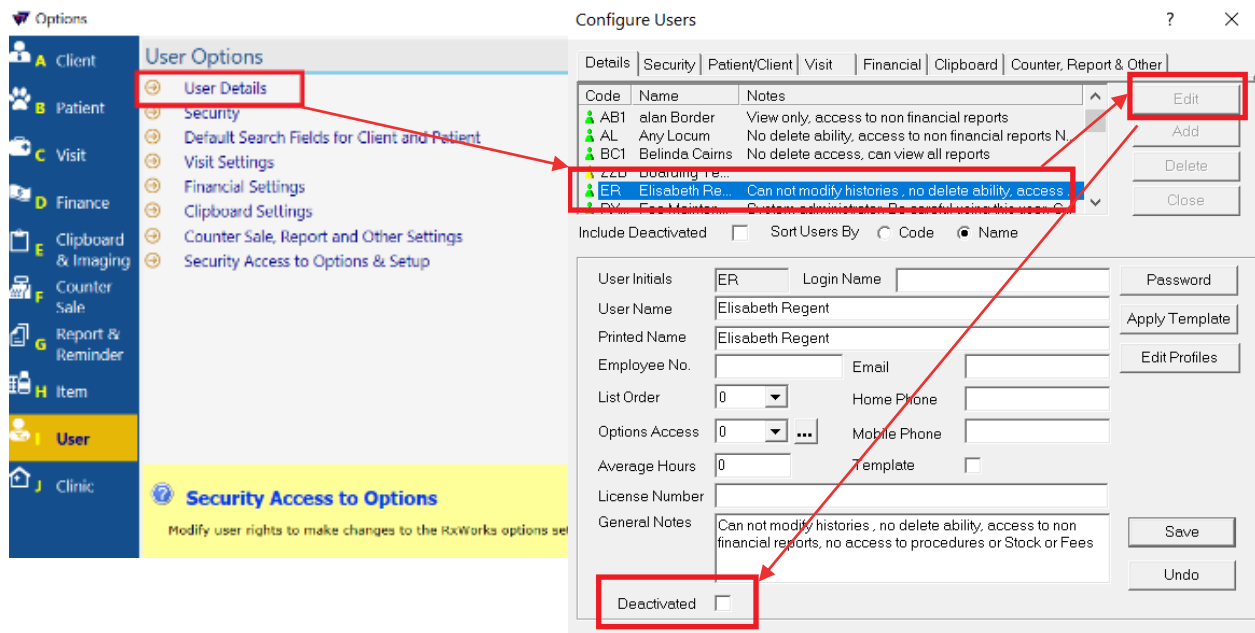


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Users

Deactivate Users That no Longer Work at The Clinic

- Navigate to **Task Panel > Options & Setup > I. User**
- Select the user that you wish to deactivate
- Click **Edit**
- Tick **Deactivate**



- **Save** and exit Options & Setup

If the user is currently logged-in, they will *not* be kicked out of their session. If they log out, then they will not be able to log in again.

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Activate Recalls or Reminders*

- To access Reminder Configuration, go to **Task Panel > Options & Setup > G. Report & Reminder > Reminders**

The screenshot shows the 'Configure Reminders' dialog box in the Covetrus software. The 'Reminders' option is selected in the left sidebar. The dialog box has three tabs: 'Custom Reminders', 'Healthcare Indicators', and 'Recalls'. The 'Custom Reminders' tab is active, showing a table of reminders. The 'Include Deactivated' checkbox is checked. The 'Deactivated Date' is set to 30/12/1899. The 'First Reminder' is set to 'Vaccination Dog-First Reminder.doc' with a period of 6 months and an email option.

Name	Species	Vaccination
Diagnostics - Coggins Test	Equine	No
Examinations - Equine	Equine	No
Examinations - Herd Health	Large Animal	No
Examinations - Standard	<All Species>	No
Examinations - Addison's disease	<All Species>	No
Examinations - Adolescent	<All Species>	No
Examinations - Adult	<All Species>	No
Examinations - Arthritis	<All Species>	No
Examinations - Blood Pressure	<All Species>	No
Examinations - Cardiovascular (Heart &...	<All Species>	No

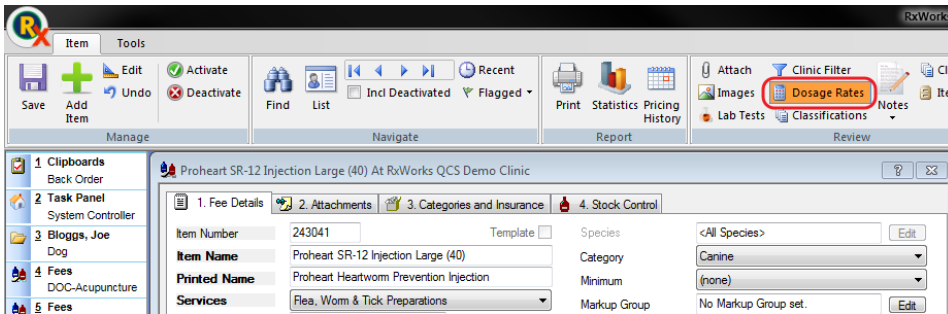
- Select Reminders (1), Health Care Indicators (2) or Recalls (3) that you want to add into your system.
- Tick **Include Deactivated**.
- When reactivating, untick the Deactivated Date and make sure you set the periods, documents that you wish to associate with the reminder, and if you want to email them.
- If you are not centrally aligned, you can create new reminders by clicking **Add**.

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Setup Dosage Rates

Before setting up dosage rates it is important to make sure that your staff are in the habit of entering the patient's weight in to RxWorks *before* adding any charges to a visit. This can be done through transferring clipboard entries, on the patient screen or the visit screen.

- Go to the Fees Screen > On your **stock item**, click **Dosage Rates** in the ribbon bar.



Note: This example is based on Proheart SR-12 currently having a dose rate of 0.05ml per 1kg.

- Set the species to dog/canine in the drop-down list and then click 'Add'.
- As the dose per kg increases at the same level we only need one rate.
- Set the minimum weight range to 0.
- The maximum weight range to a weight higher than you are likely to see in clinic.
- Concentration in this example is per kg, so 1.
- Dosage for weight range is then set to 0.05.

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Set Field Rules

Use this option to set fields as required or warning.

- This will force staff to address the data value if the field is ignored. See **Task Panel > Tools & Utilities (1) > Application (2) > Set Field Rules (3)**.
- Set some fields as mandatory that require data such as client address, client phone number, Patient DOB.
- Some fields can be set as Warning so they reminder the user that it is a good idea to provide some data.

