

# **Client Purge Tool**

# Merlin Release Notes 2.3.55





# What is it?

The Client Purge tool assists the administration of your Client's data. It allows you to remove data to which you have no requirement to hold. We have created a wizard to assist with the right of erasure which includes filtering to exclude clients where the exceptions or legal basis exists.

# How does it work?

Navigate to Administration and select 'Client Purge Tool'.

Note: This process can only be executed via the main site / central server.



Once selected, the Client Purge Tool wizard will appear.

Client Purge Tool	×
Client Purge Criteria	
Specify Purge Criteria:	
Client Site:	
Consent Period Expiry Date Before: 30/10/2015	
✓ Last Visit Date Before: 30/10/2015 30/10/2015	
Last Account Activity Before:     30/10/2015	
✓ Last Patient Reminder Date Before: 30/10/2015 □	
Last Compliance Reminder Date Before: 30/10/2015	
Last Appointment Date Before:     30/10/2015	
Or tick below to purge Specific Client:	
ContactID:	
Collent Runge Onter a >> Outstanding Balances >> Purge Exceptions >> Partial Purge >> Full Purge >> Completion	ł
Next Cancel	



# **Client Purge Criteria**

The first step is to specify which Clients you wish to purge. At least two criteria need to be specified in order to proceed. To select criteria, tick the tick box on the left-hand side. Filtering by Client Site is Mandatory.

Client Purge Tool		
		Client Purge Criteria
Specify Purge	Criteria:	
Client Site:	Esher	¥
Consent Perio	od Expiry Date Before:	30/10/2015
🕑 Last Visit Dat	e Before:	30/10/2015
🗹 Last Account	Activity Before:	30/10/2015
🗹 Last Patient F	Reminder Date Before:	30/10/2015
🕑 Last Complia	nce Reminder Date Before:	30/10/2015
🕑 Last Appointr	nent Date Before:	30/10/2015
Or tick below t	o purge Specific Client:	
ContactID:		
Client Purge Oriter	ia >> Outstanding Balar	nces >> Purge Exceptions >> Partial Purge >> Full Purge >> Completion
		Next Cancel

The Criteria is as follows:

System Setting	Function
Client Site	Filters Clients by Client site.
Consent Period Expiry Date Before	Filters Clients by consent expiry date.
Last Visit Date Before	Filters Clients by last visit date. Last visit is based on the last time a
	Client took a payment or had an appointment/treatment for their
	animal.
Last Account Activity	Filters by Last Account Activity date
Last Patient Reminder Date Before	Filters Clients by last reminders due date.
Last Compliance Reminder Date Before	Filters Clients by last compliance reminder due date.
Last Appointment Date Before	Filters Clients by last appointment date.

Alternatively, if you wish to Purge a single Client's data, enter their ContactID into the field provided and select 'Next' to proceed.



Once you have specified the criteria, select 'Next' to proceed.

Note: There is a security role for the bulk client purge process and another for purging individual client records.



#### **Outstanding Balances**

Clients with a balance will automatically be exempt from the erasure. A list of these clients will be displayed and a list can be printed by selecting 'Print Page' for your information.

Client Purge Tool			×
		Outstanding Balances	
The following Clients	s cannot be purged as they hav	ve an outstanding balance:	Print Page
ContactId	Consent Date	Client Name	Balance
🕅 🖣 Page 1 of	F1 🕨 🕅 🛛		
Client Purge Criteria	>> Outstanding Balances >	>> Purge Exceptions >> Partial Purge >>	Full Purge >> Completion
			< Back Next Cancel

To proceed, select 'Next'.

#### **Purge Exceptions**

The next screen displays any clients that are exempt from a Data Purge. Again, these can be printed for your reference.

Client Purge Tool						×
		Pur	ge Exceptions			
The following C	lients cannot be p	urged as they have purge excep	tion reasons:		Print Page	
Contactid	Consent Date	Client Name		Exception Reason		
A Page 1	of 1 🕨 🕨	2				
Oligant Durgan Origin	via pp. Outstan	dias Delenses Mr. Duras Dur	Dedial	Durse bb Full Durse	N. Completion	
Client Purge Crite	ma 🦗 Outstan	ang balances <b>&gt;&gt;</b> Purge Exc	epitons -> Partial	Fuige 💀 Fuil Purge	Completion	
				< Back	Next C	ancel

Select 'Next' to proceed to the next screen.



#### How do I exempt a Client from a Data Purge?

A client can be set as exempt from a Data Purge through the Data Consent Tab. In the 'Consent Audit' section select 'Purge Exception Entry.

Reception [User - jupiter : Site - Esher : Profile - DemoAMP ]	
😢 Clear 📙 Save 📝 Modify 🚨 Deactivate 睯 New Document 🌮 Accounts 🐉 Payments 🅎 Appointments 🖏	👂 Print 👻 🔋 Send Text 📑 Send Email
🔓 Client Details 🔯 Additional Info 🛸 Notes 🖺 Documents 🔐 Communication 🕞 Data Consent 🗞 Advanced Search	
Data Consent         Registration - In Practice         Communication Preferences         Select communication methods the client has agreed to receive.	Consent Audit Consent History Purge Exception Entry Client Terms Generate your Privacy Statement below, these documents will be saved to Client Documents.

The following window will display which allows you to record a Purge Exception Reason, the date the exemption is valid until and record any notes along with the user's initials.

Consent Audit	
Consent History Purge Exception Entry	
Client Terms	
Purge Exception Entry	×
This record is exempt from a data purge due to: Outstanding Insurance 💌	
Unless voided this exception is in place until: 01/01/2019	
Notes Outstanding claim. Do not purge.	
Enter your initials below to submit the record.	_
Initials jd Confirm	
s details are	

The Client will then be exempt from a Data Purge until the date specified. This is recorded in the Consent History section for your records.

			Consent Audit Consent History	Purge Exception Entry				
C	onsent History							×
		1						
	Entry Date	Туре	Method	Notes	Expiry Date	Initials	User	
	30/10/2018	Purge Exception	Outstanding Insurance	Outstanding claim. Do not purge.	01/01/2019	jc	jupiter	
	20/03/2018	Communication Consent	Registration - In Practice	Letter=Yes,Email=Yes,Email Promo=Yes,Email Remin	20/03/2019	sa	dbo	



#### **Partial Purge**

This screen displays all Clients who have registered Patients that have received treatment within the last 5 years. These Clients can only be partially purged as their data is required for legal purposes.

The fol	owing Cli	ients have registered p	patient's that have	e received treatment w	ithin the last 5 years a	nd can therefore only b	e partially
purged Cont	Cons	Client Name	Name/No	Address1	Address2	City	PostCode
1455		The test clicnicaltest		12		Bewdley	
1455		The test testclinical		12		. Burford	
14 4	Page 1	_of 1   ▶ ▶]   🚑				1	Displaying 1 - 2 of
14 4	Page 1	of 1   🕨 🕅 🤕				c What Data will 1	Displaying 1 - 2 of De purged?

The following data is deleted as part of a 'Partial Purge':

Partial Purge				X
Client Details		Patient Details		1
First Name Surname Address Details SMS/Email Communication Logs VetXML Communication Client Documents Client Notes & Pop-Up Notes Phone Number(s) Email Address(es)	***	Name Patient Details Patient Location Appointment Details (Location & Notes) Treatment & Archive Treatment History Patient Documents Patient Notes	X X X X X X	
			Close	

Select the 'Next' button to proceed.



# Full Purge

This screen displays a list of Clients that are to be fully Purged.

ent Purg	e Tool							
				Full Purge				
The foll	lowing Cl	ients registered patier	ts have no treatment	recorded within the la	st 5 years. Therefore t	their data will be fully p	purged.	
Cont	Cons	Client Name	Name/No	Address1	Address2	City	PostCo	
1217		Professor Selenium						1
1453		SeleniumTest Sele						
1454		The 333 soroa		3453		(none)	SDFA	
1453		The ADD ADD		ADD		*	ADD	ľ
1455		The ADDING NEW		DSFSDFSD		Lucton		
1455		The Agent Orange		Orange		Teddington	ORAN	
1453		The ASDF ASDF		ASDF		19 RABLING ROAD	ASDF	
1455		The asdf asfd		343434		(none)		
1455		The asdfsadf asdfs		asdfsdaf		. Horsham	234234	
1455		The Bad Debtor Dave		sdsf		Readinge	TESTER	
1454		The Barney marshall		qwerty way		Wootton Bassett	FR45TG	
1455		The bbbbbbbbbbbbbbbbbbbbbbbbbbbbbbbbbbbb	bbbbbbbbbbbbbbb	bbbbbbbbbbbbbbb	bbbbbbbbbbbbbbb	-		
1455		The c change		sdfsdfdsf		Trawlor	TE32EF	
14 4	Page 1	of 1 🕨 🕅 ಿ				Displa	ying 1 - 60 c	of 6
						What Data will be	purged?	¢
lient Pur	ge Crite	ria >> Outstanding	Balances >> Purg	e Exceptions >> Pa	artial Purge >> Full	Purge >> Completi	on	
					<	Back Next	Cano	el

The following data is deleted as part of a 'Full Purge'.

Client Details		Patient Details	
First Name	<b>~</b>	Name	×
Surname	<ul> <li>Image: A second s</li></ul>	Patient Details	*
Address Details	<ul> <li>Image: A second s</li></ul>	Patient Location	<ul> <li>Image: A second s</li></ul>
SMS/Email Communication Logs	<ul> <li>Image: A second s</li></ul>	Appointment Details (Location & Notes)	<ul> <li>Image: A second s</li></ul>
VetXML Communication	<ul> <li>Image: A second s</li></ul>	Treatment & Archive Treatment History	*
Client Documents	<ul> <li>Image: A second s</li></ul>	Patient Documents	<ul> <li>Image: A second s</li></ul>
Client Notes & Pop-Up Notes	<ul> <li>Image: A second s</li></ul>	Patient Notes	
Phone Number(s)	<ul> <li>Image: A second s</li></ul>		
Email Address(es)	× .		

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#### Completion

Selecting 'Next' will bring up the following confirmation message. Select 'Yes' to continue.



The Clients will then be scheduled for a partial or full purge as specified.

Client Purge Tool	×
Completion	
Purging Client/s data:	
2 Clients scheduled to be Partially Purged	
60 Clients scheduled to be Fully Purged	
Open the Purge History Tool to view completed and pending purges	
Client Purge Criteria >> Outstanding Balances >> Purge Exceptions >> Partial Purge >> Full Purge >> Completion	
< Back Close	

Client Purges are scheduled tasks that run out of working hours.



# **Client Purge History**

To view a log of Client Purges, navigate to Administration > Purge History.



If a purge status is showing as pending, it is possible for you to delete the purge and stop the process. A security permission is required to do this.

When a purge is committed with the purge tool

this marks all clients as deactivated, if this client is reactivated before the purge is run then the purge for this client will fail.

The actual purge of client details occurs during the daily maintenance routines, this allows for a small amount of time to correct a purge mistake before it occurs.

Deleting a scheduled purge will not reactivate the client automatically.

A client's details be recorded in the system audit history until the data retention settings lapse, you must make it clear to any client who requests a purge of what is happening with their data and how long it may be retained in backups and audit history.

Once selected, the below screen will display. This screen allows you to view each Purge Run and which clients were purged partially and fully.

Purge Runld	Purge Date	Purge Criteria		User Na	me	Status
12	30/10/2018	ClientSiteId=1101,User=jupiter,ConsentPeriod	dExpiryDate=Oct 30 2015	12 jupiter		PENDING
11	30/10/2018	ContactId=1456906, ClientSiteId=1101,User	=AutomateLakshmiAgain	Automat	eLakshmiAgain	PENDING
10	11/10/2018	ClientSiteId=1101,User=jupiter,ConsentPeriod	dExpiryDate=Oct 11 2015	12 jupiter	2 jupiter	
9	11/10/2018	ClientSiteId=1101,User=Alpha,ConsentPerio	dExpiryDate=Oct 11 2015	12 Alpha		PENDING
7	11/10/2018	ContactId=1342832, ClientSiteId=1106,User	=Alpha	Alpha		PENDING
5	10/10/2018	ClientSiteId=1101,User=jupiter,ConsentPerio	dExpiryDate=Oct 10 2015	12 jupiter		PENDING
1	11/09/2018	ContactId=1455762, ClientSiteId=1101,User	=jupiter	jupiter		PENDING
ContactId	Contact Nam	e	Purge Type	Status	Error Messag	e
Contactid	Contact Nam	e	Purge Type	Status	Error Messag	e
ContactId 1217499	Contact Nam Professor Sel	e eniumuser1	Purge Type Full	Status Pending	Error Messag	e
ContactId 1217499 1453380	Contact Nam Professor Sel SeleniumTest	e eniumuser1 Seleniumtestuser1	Purge Type Full Full	Status Pending Pending	Error Messag	e
ContactId 1217499 1453380 1454685	Contact Nam Professor Sel SeleniumTest The 333 soro	e eniumuser1 Seleniumtestuser1 a	Purge Type Full Full Full	Status Pending Pending Pending	Error Messag	e
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ContactId 1217499 1453380 1454685 1453497 1455889 1455884 1455884 1455857	Contact Nam Professor Sel SeleniumTest The 333 soro The ADD ADI The ADD ING The Agent Or The ASDF AS The asdf asdf	e eniumuser1 Seleniumtestuser1 a D NEW ADDING NEQ ange DDF	Purge Type Full Full Full Full Full Full Full Ful	Status Pending Pending Pending Pending Pending Pending Pending	Error Messag	e
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Contactid 1217499 1453380 1454685 1453497 1455889 1455884 1455885 1455857 1455857 1455857 1455881	Contact Nam Professor Sel SeleniumTest The 333 soro The ADD ADI The ADDING The ADDING The Agent Or The ASDF AS The asdf asfg The Bad Deb The Bad Deb	e eniumuser1 Seleniumtestuser1 a D NEW ADDING NEQ ange DDF selfsadf come sadfsadf	Purge Type Full Full Full Full Full Full Full Ful	Status       Pending       Pending	Error Messag	e
ContactId 1217499 1453380 1454685 14554685 1455889 1455884 14558857 1455857 14555712 1455772	Contact Nam Professor Sel SeleniumTest The 333 soro The ADD ADI The ADDING The Apent Or The ASDF A5 The asdf asfo The Bad Deb The Barney n	e e niumuser1 Seleniumtestuser1 a NEW ADDING NEQ ange softsadf for Dave tarshall bibbbb bibbbbb bibbbbb	Purge Type Full Full Full Full Full Full Full Ful	Status Pending Pending Pending Pending Pending Pending Pending Pending Pending Pending Pending Pending	Error Messag	0

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