

Client Purge Tool

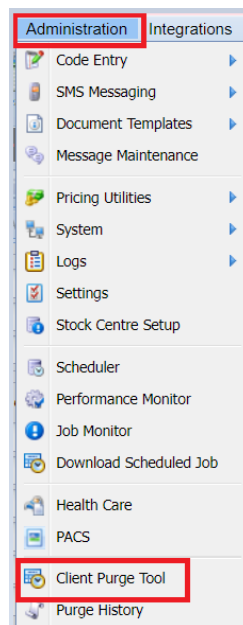
05/11/2024 9:54 am GMT

Summary

The 'Client Purge Tool' is an administrative tool assisting practices with [GDPR compliance](#). It is used to remove personal client data from your practice management system which you have no requirement to hold.

Details

The 'Client Purge Tool' can be located under the 'Administration' menu.



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:

☒ Last Visit Date Before:

☒ Last Account Activity Before:

☒ Last Patient Reminder Date Before:

☒ Last Compliance Reminder Date Before:

☒ Last Appointment Date Before:

☒ Registration Date Before:

Or tick below to purge Specific Client:

☐ ContactID:

Client Purge Criteria >> Outstanding Balances >> Purge Exceptions >> Partial Purge >> Full Purge >> Completion

Next Cancel

Using the Client Purge Tool Wizard

1) Client Purge Criteria

Specify which Clients you wish to purge using the criteria filters provided:

Client Site = Clients registered site.

Consent Period Expiry Date = Data Consent Expiry Date.

Last Visit Date = Clients last visit date. (based on the last payment/appointment/treatment date)

Last Account Activity = Filters by the last date activity occurred on in the clients accounts.

Last Patient Reminder Date = Filters by the last date patient reminder due date for a patient under the clients account.

Last Compliance Reminder Date = Filters by the last entry due date for compliance reminders on patients under the clients account.

Last Appointment Date = Filters by the last appointment date for the client.

Registration Date Before = Filters when client was registered. When selected, any clients registered after the chosen date will not be deleted.

At least two of the criteria need to be specified in order to proceed. Filtering by 'Client Site' is Mandatory.

Specific Client Option

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

Or tick below to purge Specific Client:

☒ ContactID:

Client Purge Criteria >> Outstanding Balances >> Purge Exceptions >> Partial Purge >> Full Purge >> Completion

Next

Cancel

Select the 'Next' button to proceed to the next section.

2) Outstanding Balances

Clients with an outstanding balance will be exempt from the data purge. A list of these clients will be displayed which can be printed for reference if required.

Client Purge Tool

Outstanding Balances

The following Clients cannot be purged as they have an outstanding balance: [Print Page](#)

ContactId	Consent Date	Client Name	Balance
1217595	22/01/2020	Dame Kay Tester	0
13943	08/07/2018	Dr S J Davies	0
1217698		Miss Cassia Smart	261.83
217050	09/12/2020	Mr A Smith	87.24
17936	08/07/2018	Mr/Mrs A Love	0
1217350	13/09/2020	Mr/Mrs Ali Jones	0
1217353	07/11/2019	Mr/Mrs Ali Mat	34.78
1217587	15/10/2020	Mr/Mrs Andy Smith	0
1217381	13/09/2020	Mr/Mrs C Turton	1236.63
1217507	08/04/2020	Mr/Mrs H Turton	503.31
1217387	07/11/2019	Mr/Mrs J Cotten	22.34
1217574	15/12/2019	Mr/Mrs J Jones	135.43
1217504	11/02/2021	Mr/Mrs Jim Cottee	32.25
1217620		Mr/Mrs K Marshal	19.27

Page 1 of 1

Displaying 1 - 33 of 33

Client Purge Criteria >> Outstanding Balances >> Purge Exceptions >> Partial Purge >> Full Purge >> Completion

< Back Next Cancel

Select the 'Next' button to proceed to the next section.

3) Purge Exceptions

A list of Clients that have been registered as exempt from a Data Purge are displayed. Again, these can be printed for your reference if required.

Client Purge Tool

Purge Exceptions

The following Clients cannot be purged as they have purge exception reasons:

[Print Page](#)

ContactId	Consent Date	Client Name	Exception Reason
1217723	23/06/2021	Mr/Mrs C Donald	Ongoing Case

See [Registering a Client](#) for information on how to add an exception to the clients record.

Select the 'Next' button to proceed to the next section.

4) Partial Purge

This screen displays all Clients who have 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 following data is deleted as part of a 'Partial Purge':

Partial Purge

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

[Close](#)

Select the 'Next' button to proceed to the next section.

5) Full Purge

This screen displays a list of Clients who will have their data fully purged.

Client Purge Tool

Full Purge

The following Clients registered patients have no treatment recorded within the last 5 years. Therefore their data will be fully purged.

Cont...	Cons...	Client Name	Name/No	Address1	Address2	City	PostCode
2301	08/0...	Mr S. J. Heal		Prospect Garage		Egham	GU13 ...
754	08/0...	Mr W J Pickering		Timbers		Guildford	GU13 ...
1217...	03/0...	Mr/Mrs Clarkson Ri...	45	Europa Park Road		Guildford	GU1 1AJ
1217...	21/0...	Mrs Fearne Cotton	65	Percy Street		London	SE2 6HG
1218...		Mrs H Lawrence	206	Westcliffe Road	Baldon	Shipley	BD17 9...
18120	08/0...	Ms Burns	98	Winslade Road		Weybridge	GU20 ...

Page 1 of 1

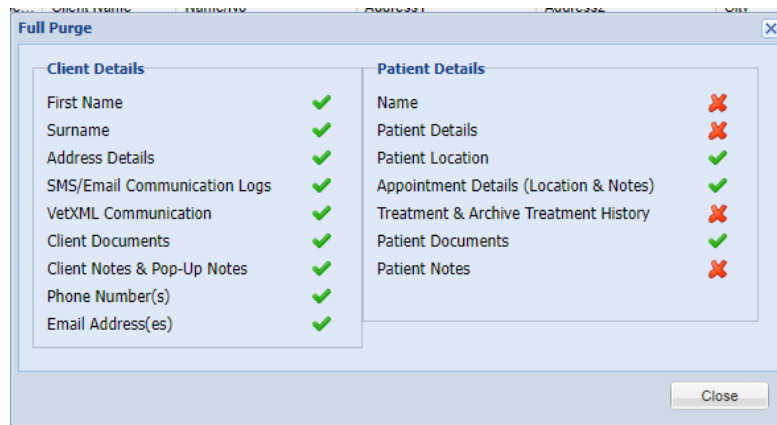
Displaying 1 - 6 of 6

What Data will be purged?

Client Purge Criteria >> Outstanding Balances >> Purge Exceptions >> Partial Purge >> **Full Purge** >> Completion

[< Back](#) [Next](#) [Cancel](#)

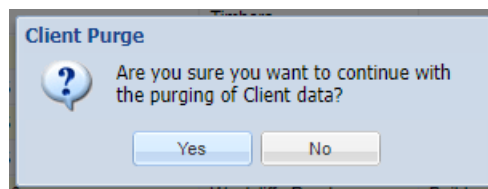
The following data is deleted as part of a “Full Purge”.



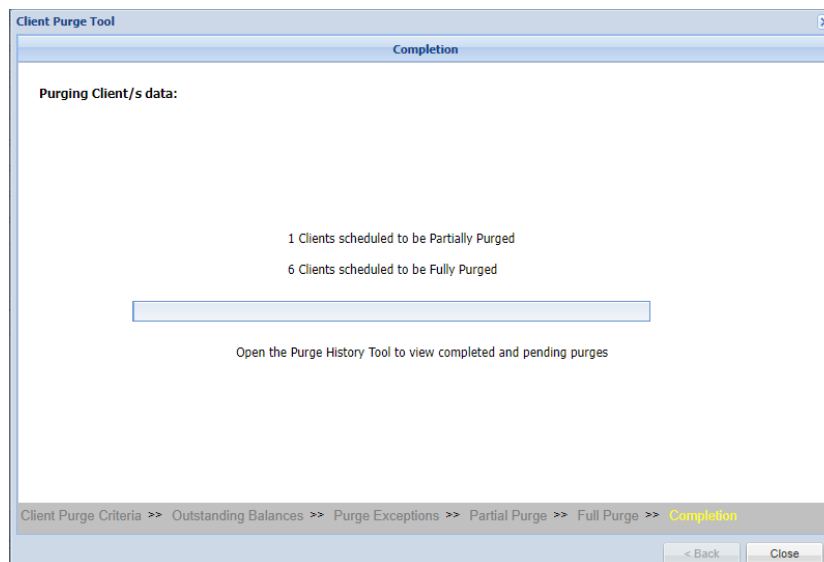
Select the 'Next' button to proceed to the next section.

6) 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 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.

This screen allows you to view each Purge Run and which clients were purged partially and fully.

Client Purge History				
				<input type="button" value="Delete"/> <input type="button" value="Close"/>
Purge RunId	Purge Date	Purge Criteria	User Name	Status
18	17/07/2024	ClientSiteId=1101,User=jupiter,ConsentPeriodExpiryDate=Jul 17 2021,La	jupiter	PENDING
15	21/05/2024	ClientSiteId=1101,User=jupiter,ConsentPeriodExpiryDate=May 21 2020,L	jupiter	Purged
13	09/05/2024	ClientSiteId=1101,User=jupiter,ConsentPeriodExpiryDate=May 09 2021,L	jupiter	Purged

If a purge status is showing as pending, it is possible for you to delete the purge and stop the process.