

# Client Purge Tool

Merlin Release Notes 2.3.55

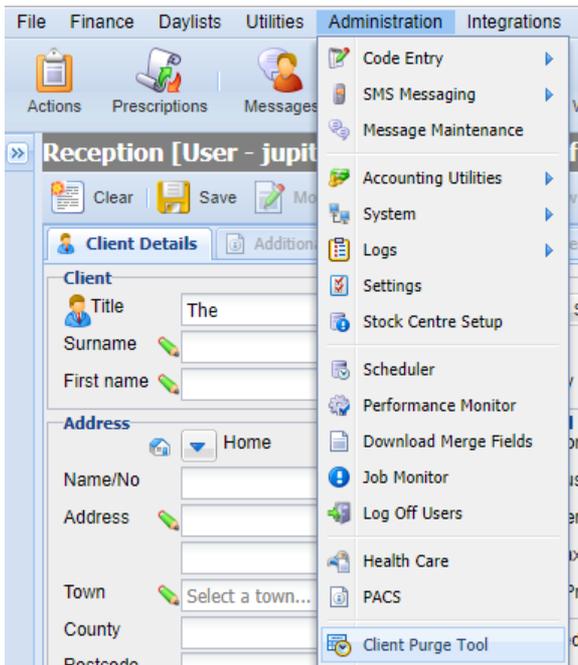
## What is it?

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.

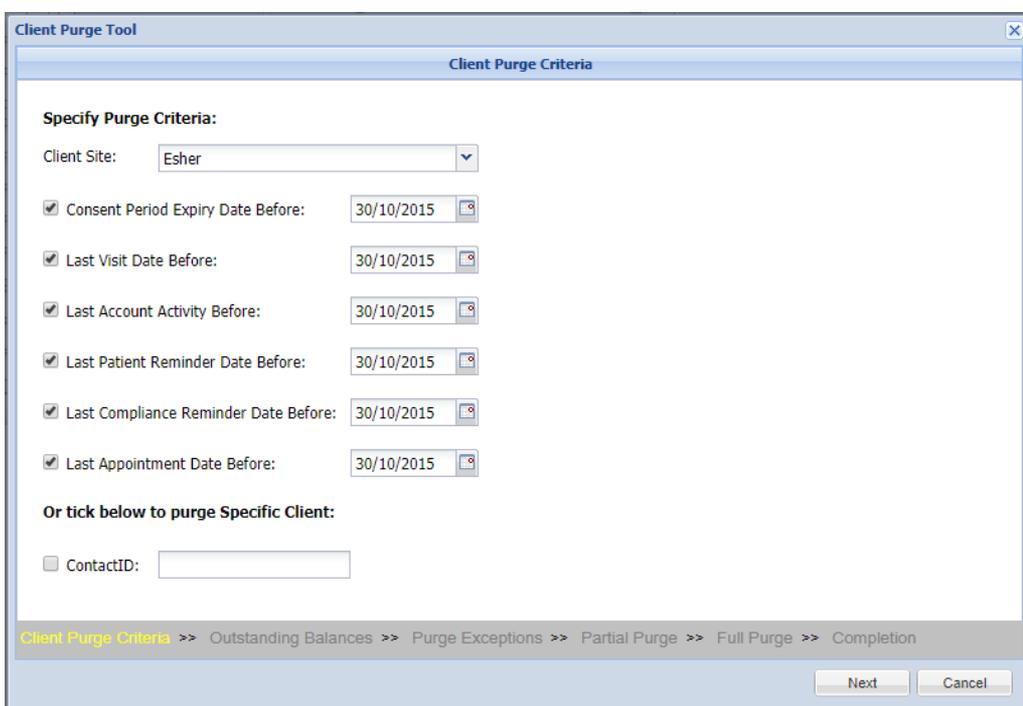
## How does it work?

Navigate to Administration and select 'Client Purge Tool'.

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

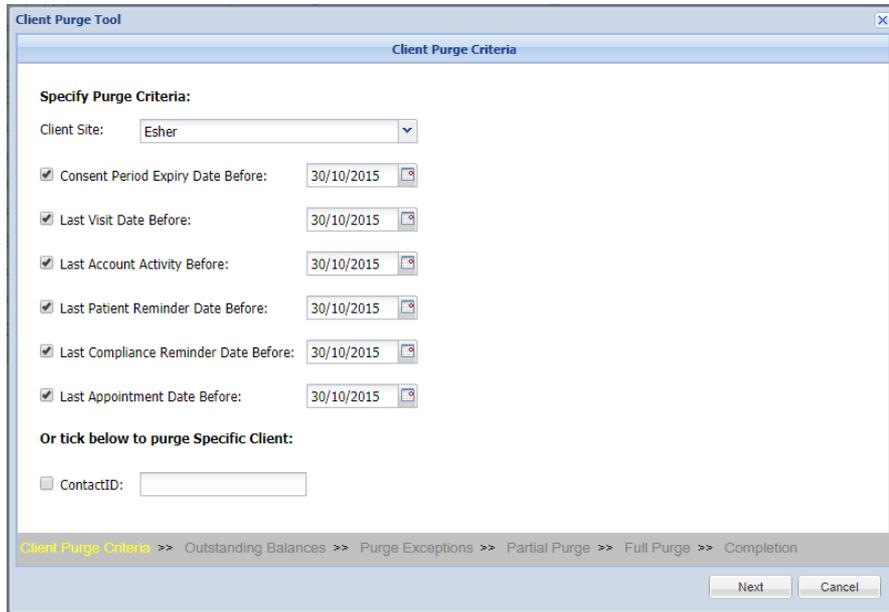


Once selected, the Client Purge Tool wizard will appear.



## Client Purge 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.



The Criteria is as follows:

<b>System Setting</b>	<b>Function</b>
<i>Client Site</i>	Filters Clients by Client site.
<i>Consent Period Expiry Date Before</i>	Filters Clients by consent expiry date.
<i>Last Visit Date Before</i>	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.
<i>Last Account Activity</i>	Filters by Last Account Activity date
<i>Last Patient Reminder Date Before</i>	Filters Clients by last reminders due date.
<i>Last Compliance Reminder Date Before</i>	Filters Clients by last compliance reminder due date.
<i>Last Appointment Date Before</i>	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.

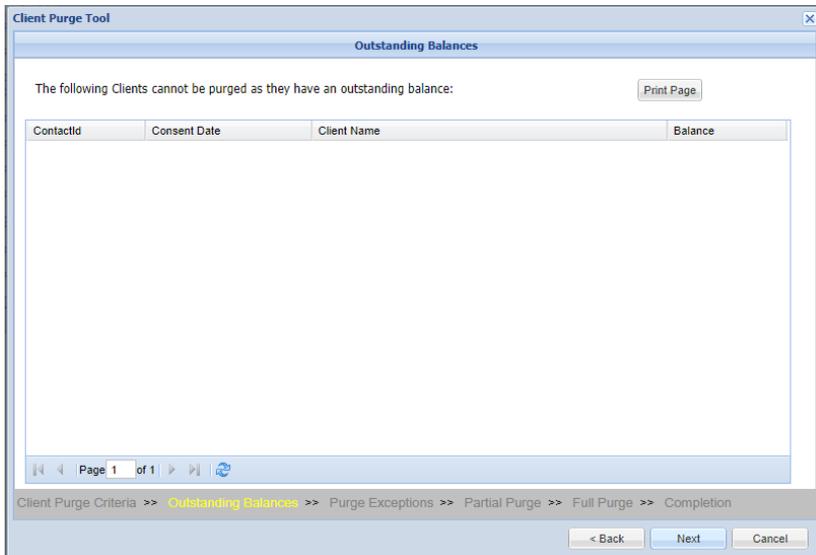


Once you have specified the criteria, select 'Next' to proceed.

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

## Outstanding Balances

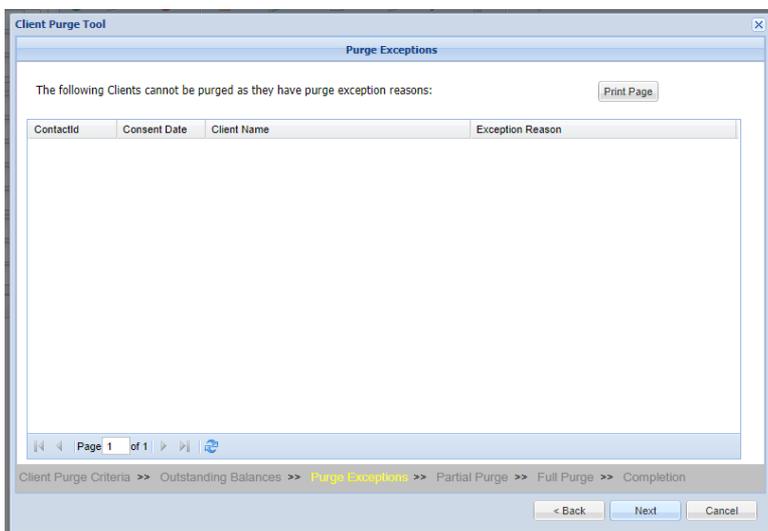
Clients with a balance will automatically be exempt from the erasure. A list of these clients will be displayed and a list can be printed by selecting 'Print Page' for your information.



To proceed, select 'Next'.

## Purge Exceptions

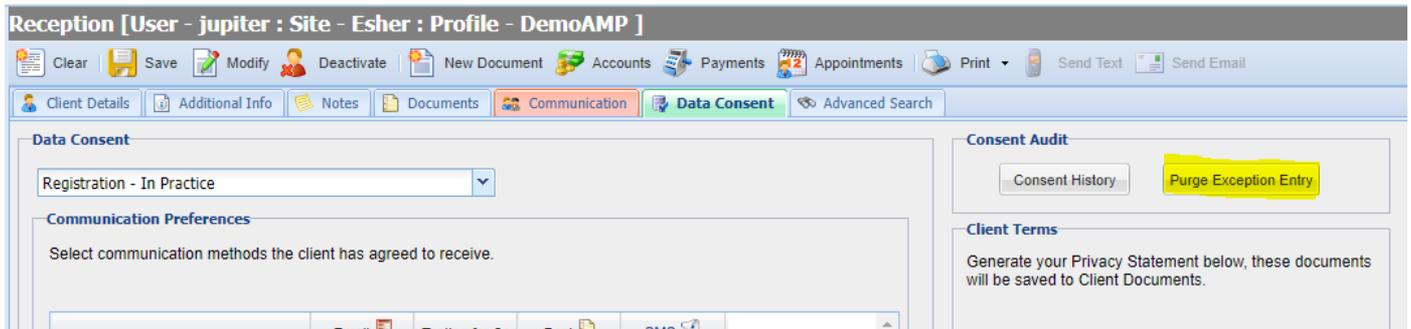
The next screen displays any clients that are exempt from a Data Purge. Again, these can be printed for your reference.



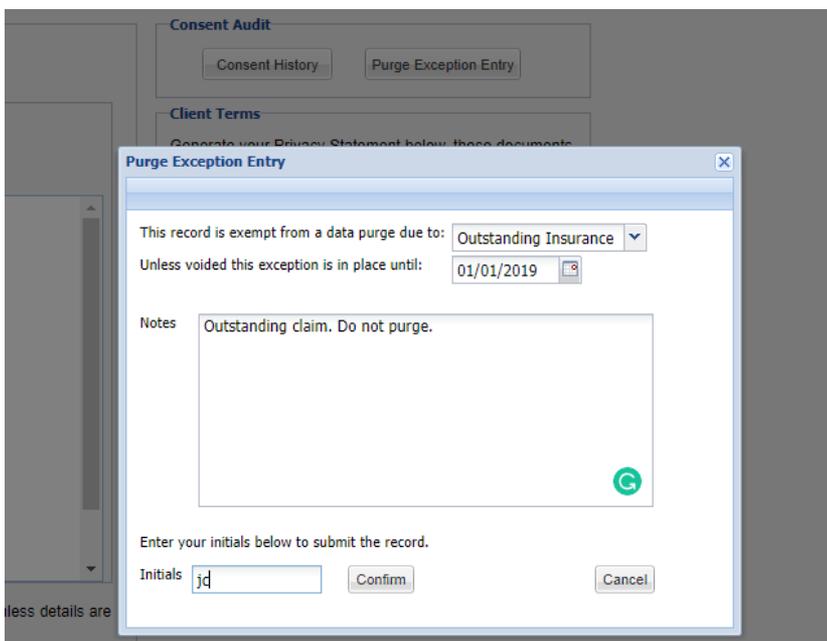
Select 'Next' to proceed to the next screen.

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

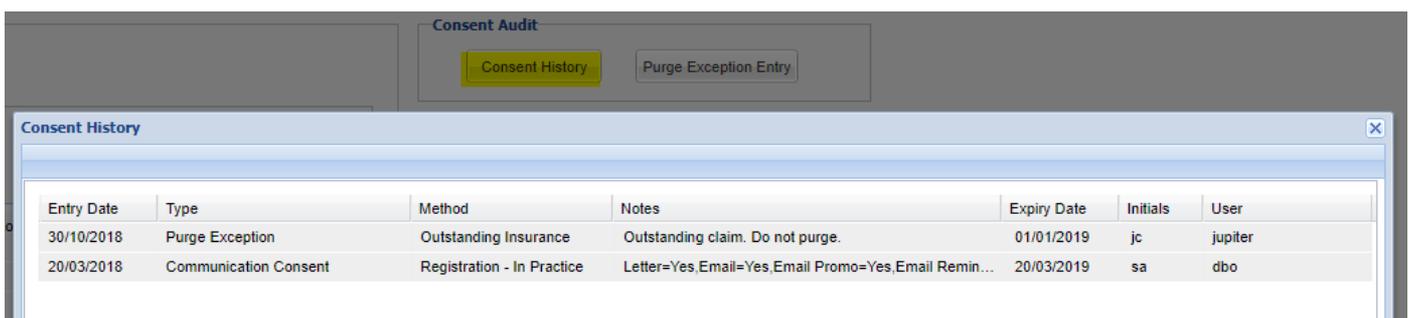
A client can be set as exempt from a Data Purge through the Data Consent Tab. In the 'Consent Audit' section select 'Purge Exception Entry'.



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.

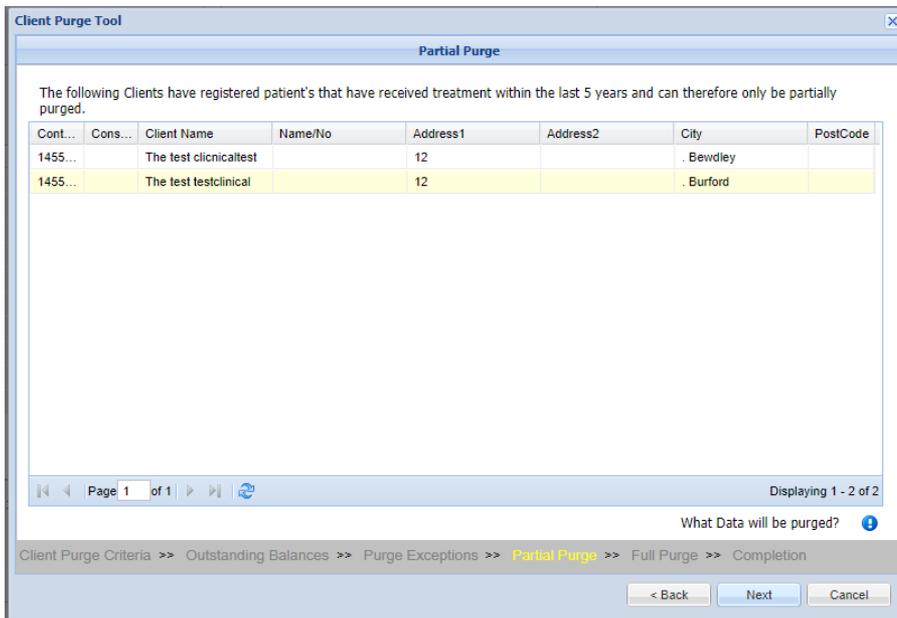


The Client will then be exempt from a Data Purge until the date specified. This is recorded in the Consent History section for your records.



## 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.



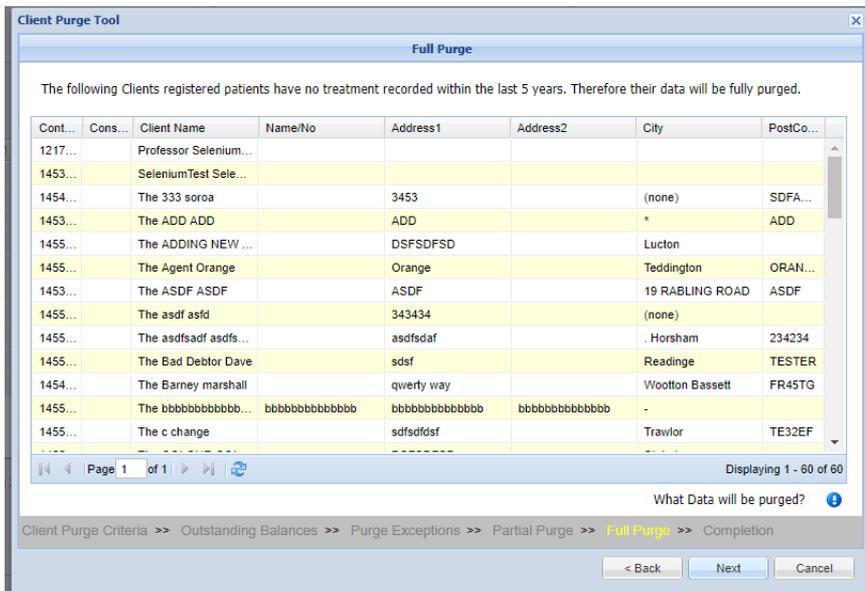
The following data is deleted as part of a 'Partial Purge':



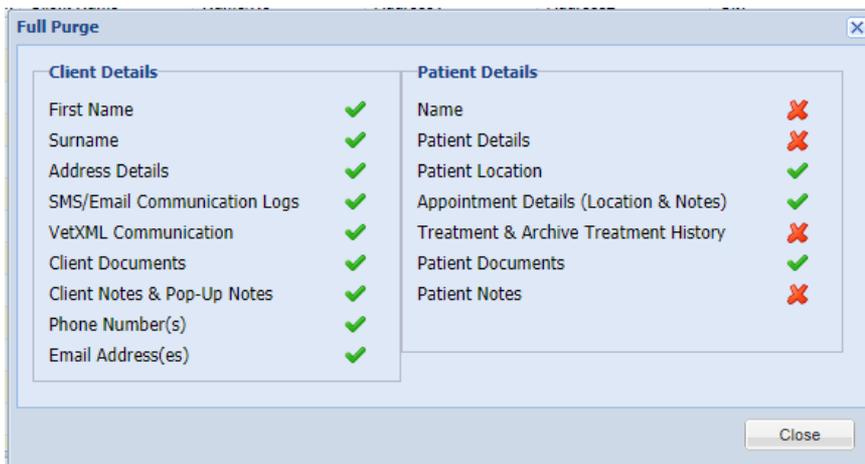
Select the 'Next' button to proceed.

## Full Purge

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

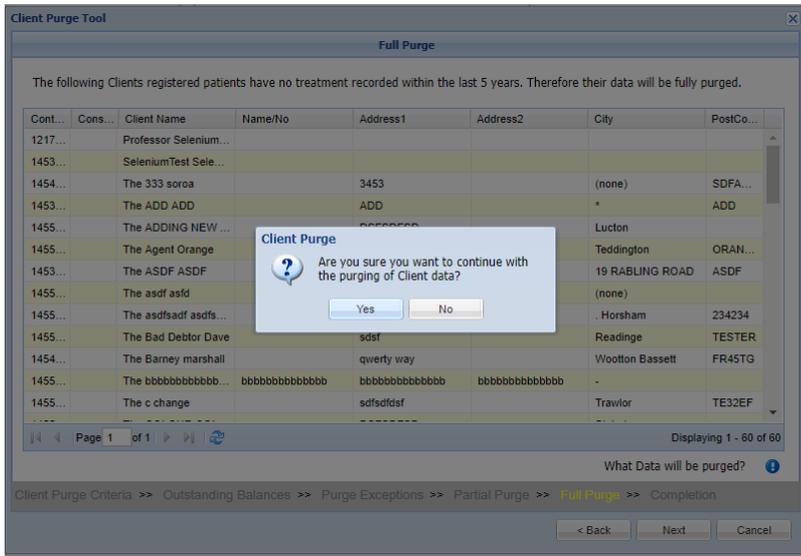


The following data is deleted as part of a 'Full Purge'.

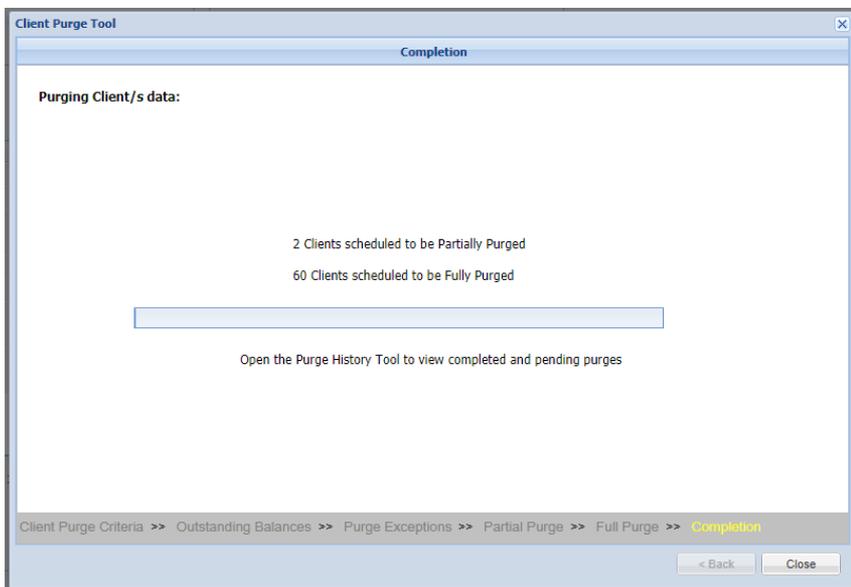


## Completion

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.



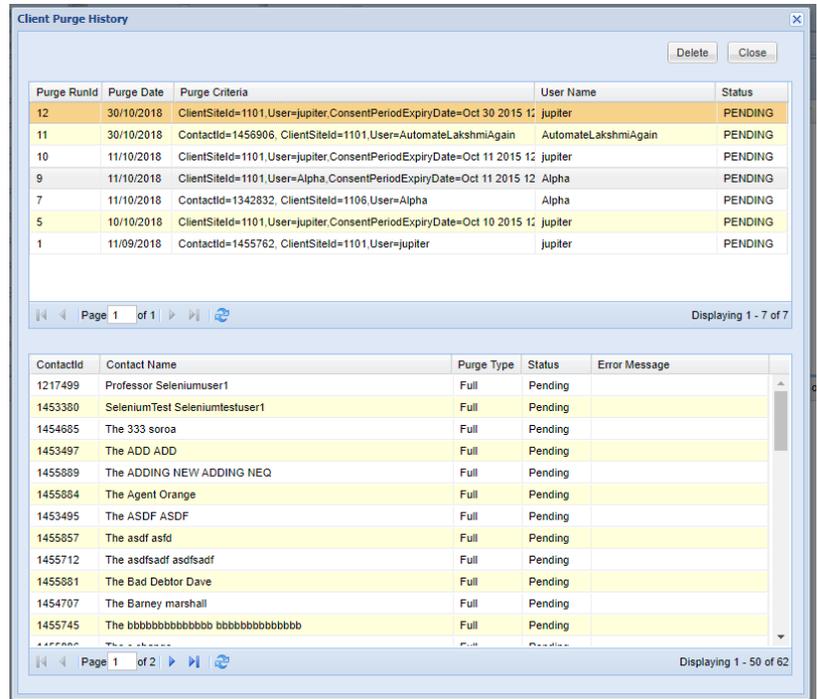
Client Purges are scheduled tasks that run out of working hours.

# Client Purge History

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



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 RunId	Purge Date	Purge Criteria	User Name	Status
12	30/10/2018	ClientSiteId=1101,User=jupiter.ConsentPeriodExpiryDate=Oct 30 2015 12	jupiter	PENDING
11	30/10/2018	ContactId=1456906, ClientSiteId=1101,User=AutomateLakshmiAgain	AutomateLakshmiAgain	PENDING
10	11/10/2018	ClientSiteId=1101,User=jupiter.ConsentPeriodExpiryDate=Oct 11 2015 12	jupiter	PENDING
9	11/10/2018	ClientSiteId=1101,User=Alpha.ConsentPeriodExpiryDate=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.ConsentPeriodExpiryDate=Oct 10 2015 12	jupiter	PENDING
1	11/09/2018	ContactId=1455762, ClientSiteId=1101,User=jupiter	jupiter	PENDING

ContactId	Contact Name	Purge Type	Status	Error Message
1217499	Professor Seleniumuser1	Full	Pending	
1453380	SeleniumTest Seleniumtestuser1	Full	Pending	
1454685	The 333 soroa	Full	Pending	
1453497	The ADD ADD	Full	Pending	
1455889	The ADDING NEW ADDING NEQ	Full	Pending	
1455884	The Agent Orange	Full	Pending	
1453495	The ASDF ASDF	Full	Pending	
1455857	The asdf asfd	Full	Pending	
1455712	The asdfsadf asdfsadf	Full	Pending	
1455881	The Bad Debtor Dave	Full	Pending	
1454707	The Barney marshall	Full	Pending	
1455745	The bbbbbbbbbbbbb bbbbbbbbbbbbb	Full	Pending	

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.