Data Conversion Guide

COVETRUS PULSE™

software.covetrus.com | 855.478.7920
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Overview

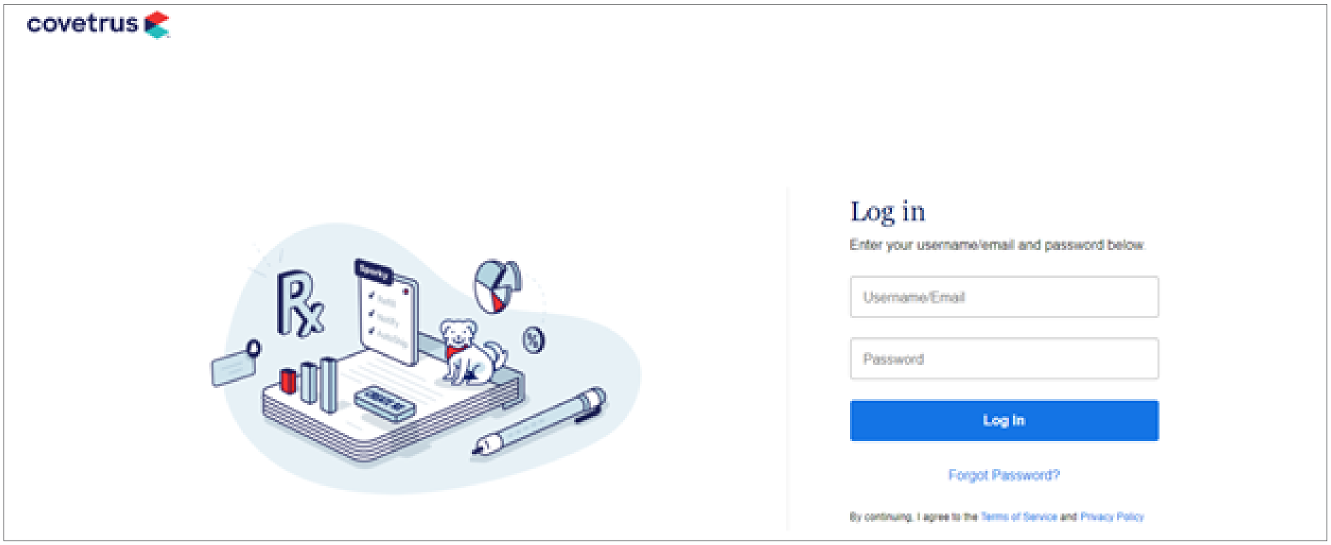
This guide assists new Covetrus® clients in confirming the data converted to Covetrus Pulse™ matches your previous veterinary software data.

- The Conversion Programmers need to obtain a copy of your data.
- The data will be converted for viewing on your Covetrus Pulse site.
- The primary contacts will receive a username and password from an Onboarding Specialist.

During the process of data verification, please keep a list of any and all discrepancies found. Bring items on the list to the attention of the Onboarding Specialist or send an e-mail to acctmanagers@evetpractice.com.

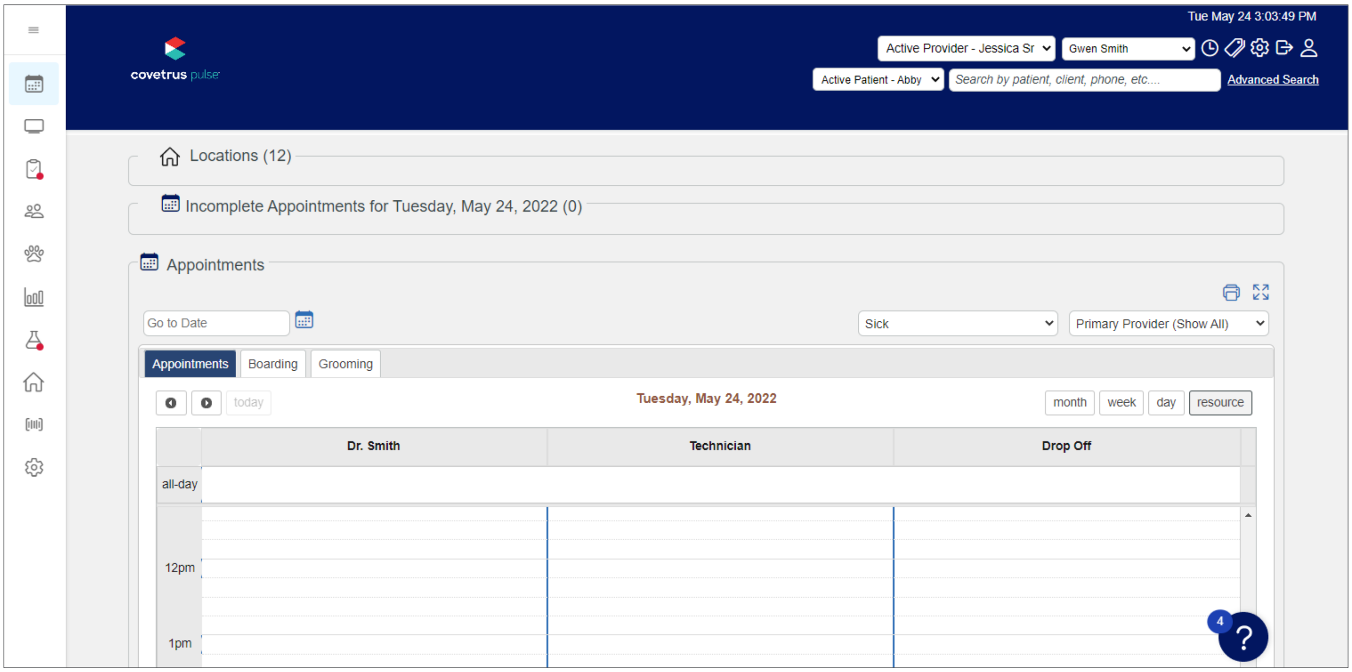
Logging Into Your Covetrus Pulse Site

1. Open a web browser, and type https://login.evetpractice.com/Practice/Account/LogOn.
2. Enter your **Username** and **Password.**
3. Click **Log On.**



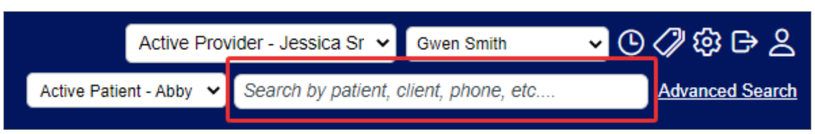
Client/Patient Database Information

When the Covetrus Pulse site opens, your screen should look similar to the one shown below:



Follow the steps below to verify client and patient data was migrated correctly.

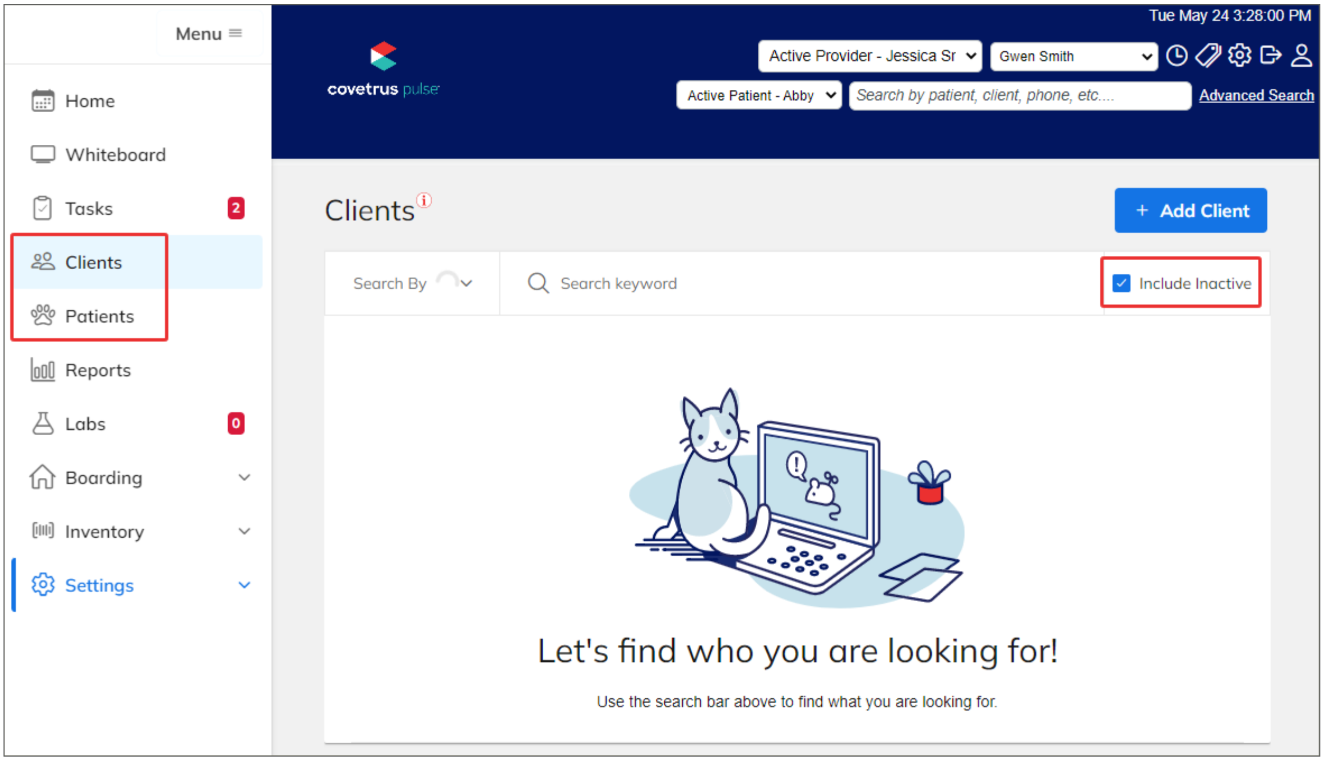
1. From the Search bar, type in the **first** or **last name** of the client. Press **Enter**.



2. Highlight the desired client and click to select.

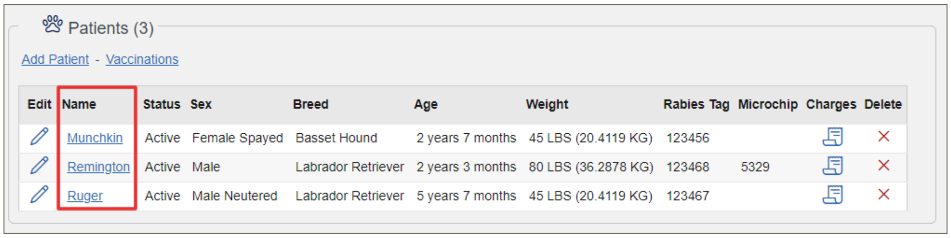
The Search feature on the homepage will allow you to quickly and easily search for an ACTIVE client or patient by the patient's name + client last name or by client first name + client last name.

INACTIVE clients and patients can be searched by using the **Clients** or **Patients** on the **Menu** and select **Include Inactive.**



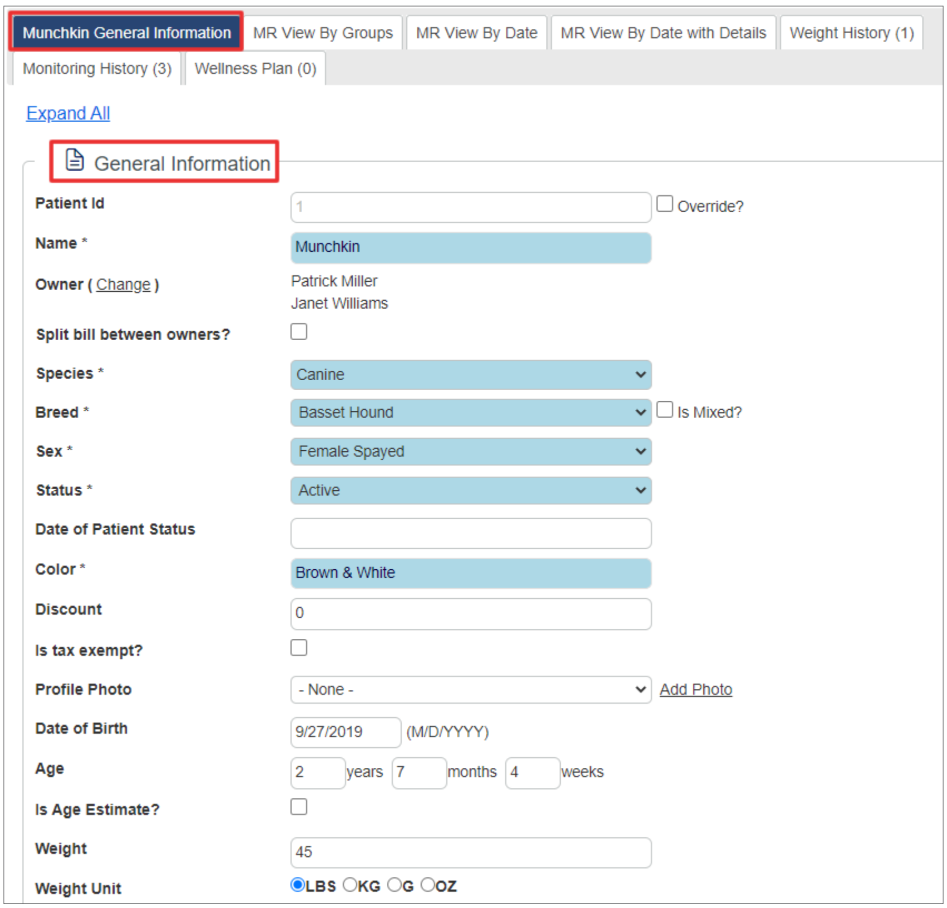
3. The Client screen displays information for the selected client. The image below represents the common sections to review. Click on each section to expand and review the values in the fields thoroughly to ensure accuracy.

4. From the Client screen, scroll down to the **Patients** section. Click on the blue hyperlink for a patient associated with the selected client. The page will display the patient's medical record.

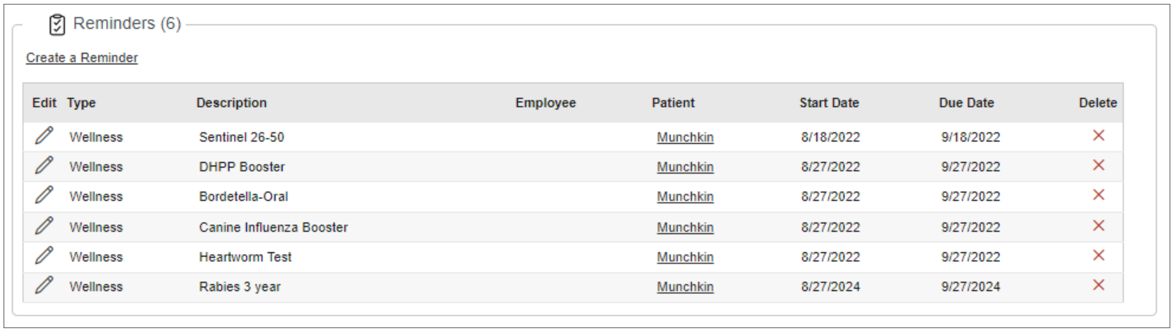


Edit	Name	Status	Sex	Breed	Age	Weight	Rabies Tag	Microchip	Charges	Delete
	Munchkin	Active	Female Spayed	Basset Hound	2 years 7 months	45 LBS (20.4119 KG)	123456			
	Remington	Active	Male	Labrador Retriever	2 years 3 months	80 LBS (36.2878 KG)	123468	5329		
	Ruger	Active	Male Neutered	Labrador Retriever	5 years 7 months	45 LBS (20.4119 KG)	123467			

5. Click on the patient's **General Information** tab. Click on the **General Information** section and scroll down the page to review the following: patient name, species, breed, sex, status, color, date of birth, weight, rabies tag, microchip, patient alerts.



6. Review the patient's reminder information by expanding the **Reminders** section.

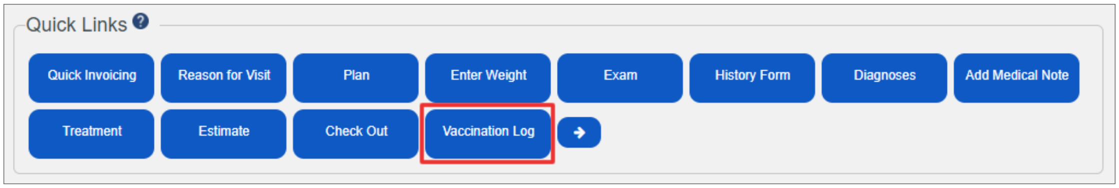

Reminders (6)

Create a Reminder

Edit	Type	Description	Employee	Patient	Start Date	Due Date	Delete
	Wellness	Sentinel 26-50		Munchkin	8/18/2022	9/18/2022	
	Wellness	DHPP Booster		Munchkin	8/27/2022	9/27/2022	
	Wellness	Bordetella-Oral		Munchkin	8/27/2022	9/27/2022	
	Wellness	Canine Influenza Booster		Munchkin	8/27/2022	9/27/2022	
	Wellness	Heartworm Test		Munchkin	8/27/2022	9/27/2022	
	Wellness	Rabies 3 year		Munchkin	8/27/2024	9/27/2024	

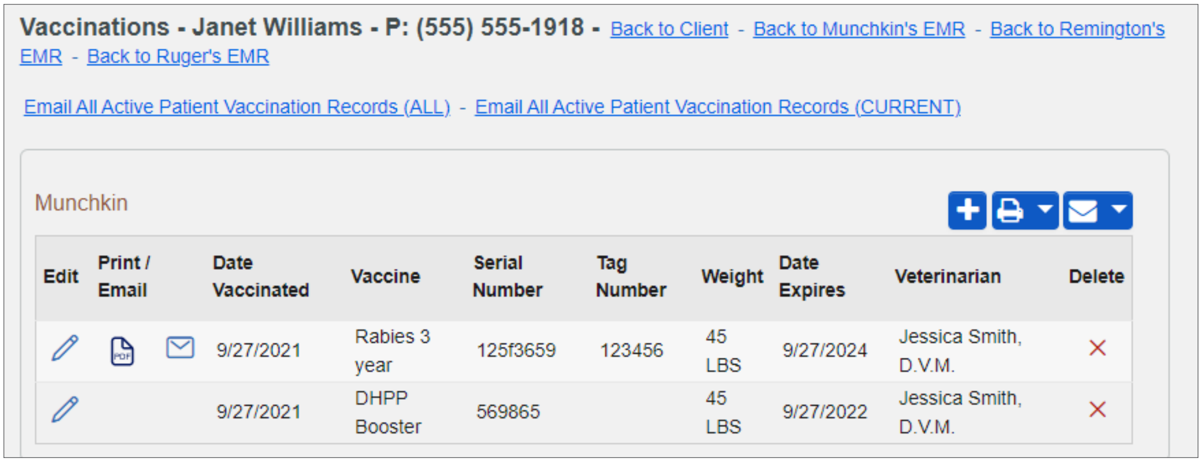
The Reminders section shows Reminder Description (name) and Due Date. Verify all information is accurate. **Type** will show **General, Wellness**, and **Recheck** reminders. These are external reminders, meaning they should be sent to your clients. Callback reminders are internal reminders, meaning they should be used to remind your staff to callback a client.

7. To check vaccine information, click on **Vaccination Log** in the Patient Quick Links section.



Note: Go to **Menu > Settings > Practice Setup > General > Medical Record Settings.** Locate Quick Links to customize your practice's Quick Links.

8. From the Vaccination Log screen, confirm date vaccinated, vaccine name, serial #, tag #, date expires and veterinarian.


Vaccinations - Janet Williams - P: (555) 555-1918 - Back to Client - Back to Munchkin's EMR - Back to Remington's EMR - Back to Ruger's EMR

Email All Active Patient Vaccination Records (ALL) - Email All Active Patient Vaccination Records (CURRENT)

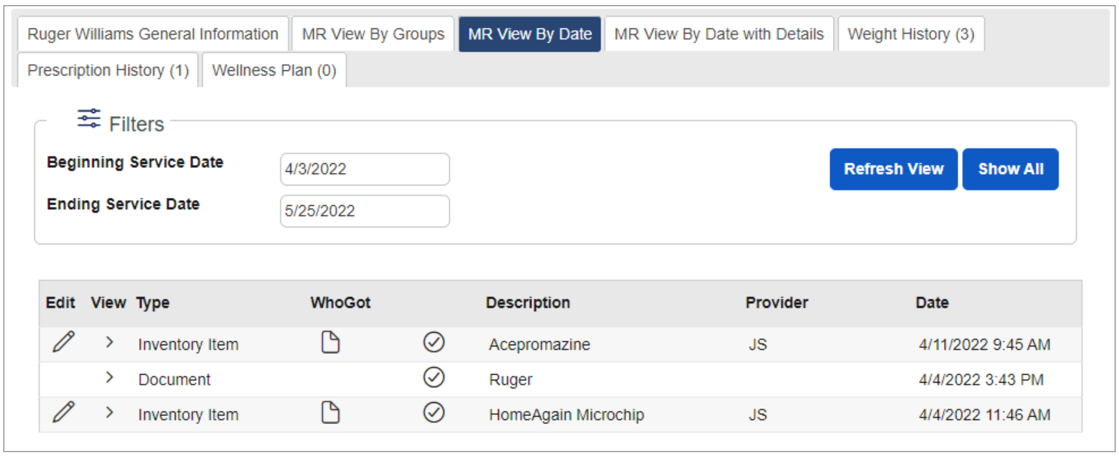
Munchkin

Edit	Print / Email		Date Vaccinated	Vaccine	Serial Number	Tag Number	Weight	Date Expires	Veterinarian	Delete
			9/27/2021	Rabies 3 year	125f3659	123456	45 LBS	9/27/2024	Jessica Smith, D.V.M.	
			9/27/2021	DHPP Booster	569865		45 LBS	9/27/2022	Jessica Smith, D.V.M.	

Medical Records

A patient's Medical Records should be reviewed.

1. Select a patient.
2. Click on **MR View By Date.**
3. The patient's medical records will display and should be reviewed. Click on the **View** icon > to expand a single record and view the information for that record.



◊ To expand all, click on the **MR View By Date with Details** tab. With all records expanded, reviewing prices, time and date, and other important information is made easier.

4. Review the medical record for Treatments, Exam/Soap Notes, Lab Results and attachments. Please note, many of these items will migrate as a **Type** of "**Medical Record Note**".

***Disclaimer**: **View by Groups** is **not** recommended. The groups are populated by using Covetrus Pulse and is not completely accurate from migrated data.*

Accounts Receivable

1. To view the Accounts Receivable balances, open the Excel® document labeled xxxxClientBalance.csv provided to you by your Onboarding Specialist.
2. Check Client's balance for accuracy. Credits display in negative amounts.

***Disclaimer**: Please compare these totals to the reports printed from the date your data was pulled.*

Billable Items

Charging or billing a client for services or inventory involves building an invoice using one of three types of billable items: **Inventory, Procedures or Labs.**

- **Inventory:** Physical items that have tracked quantity on hand for sale or use and have a cost, require a label or track as controlled substance. Example: Over the counter and prescription medications or surgical supplies.
- **Procedures:** Service items that take time. Example: Exam or Nail Trim.
- **Labs:** Items that require entry of lab results or lab integrations. Example: CBC panel.
- **Packages:** Groups or bundles of the above billable items. ***Example***: *Spay – includes the procedure, medications, and lab work.*

Check Inventory

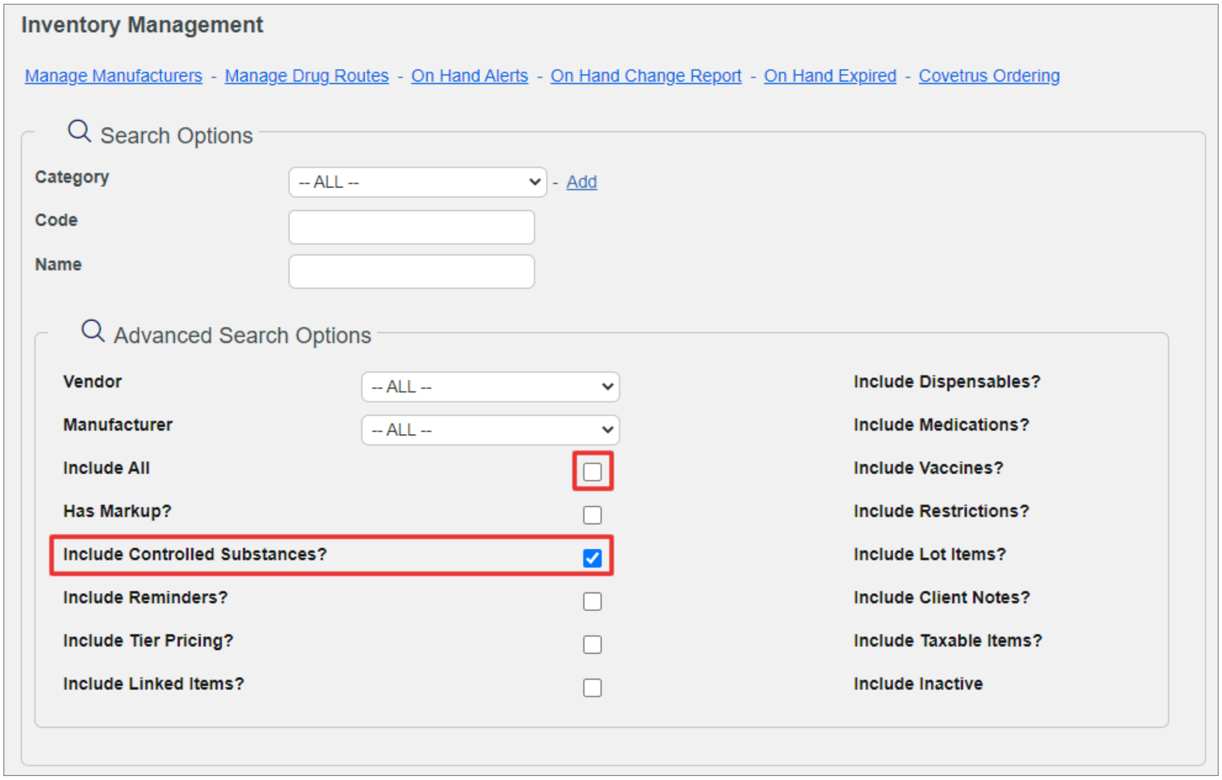
1. From the **Menu**, click on **Inventory** > **Inventory Management.**

Edit	Copy	WhoGot	Dosages	Code	Name	Location	Vendor	Cost	Markup	Price	Service Fee	Measurement	On Hand		
				0222	2% Chlorohexidine Solution 12oz		MWI	$1.00		$15.00	$0.00	each	-1		
				0110	Acepromazine		Patterson Veterinary	$0.32	300.00%	$0.96	$34.00	mL	-1		
				0109	Acepromazine 10mg			$0.27	300.00%	$0.81	$7.50	tablet	0		

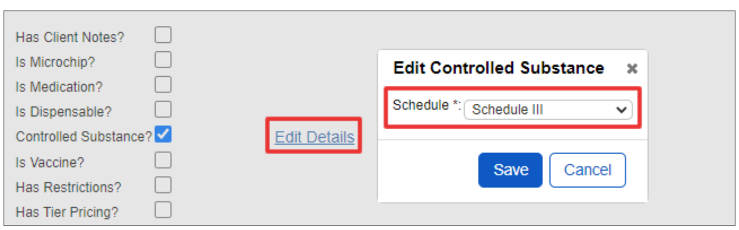
2. Review the **Code, Name, Vendor, Cost, Markup, Price, Service Fee, Measurement, On Hand** quantity and active status. Click on the **Edit** pencil to the left of the item to verify the Category.

Verify Controlled Substances

1. Verify Controlled Substances by expanding the Advanced Search Options tab, uncheck Include All and check the **Include Controlled Substances** box.



2. Set the appropriate schedule by clicking on the Edit pencil to the left of the item.
3. Scroll down to the **Controlled Substances** box and select **Edit Details**.
4. Choose the appropriate schedule from the drop-down menu and click **Save**.



Verify Reminders

1. Scroll back up to the **Advanced Search Options** section. Uncheck Include All and check the **Include Reminders** box to verify reminders 

.
2. Click on the **Edit** pencil next to the item. Verify the correct reminder is listed. Callbacks will also be listed as a Reminder.

Verify Tier Pricing

3. Scroll back up to the **Advanced Search Options** section. Uncheck Include All and check the **Include Tier Pricing** option.
4. Click on the **Edit** pencil to the left of the item.
5. Click on **Edit Details** next to **Has Tier Pricing** and verify the **Minimum Quantity and Price** levels.

Verify Dispensable Items

1. Verify **Dispensable** items in the Advanced Search Options section (what triggers a prescription label to print).
2. Uncheck Include All and check the **Include Dispensables** box 

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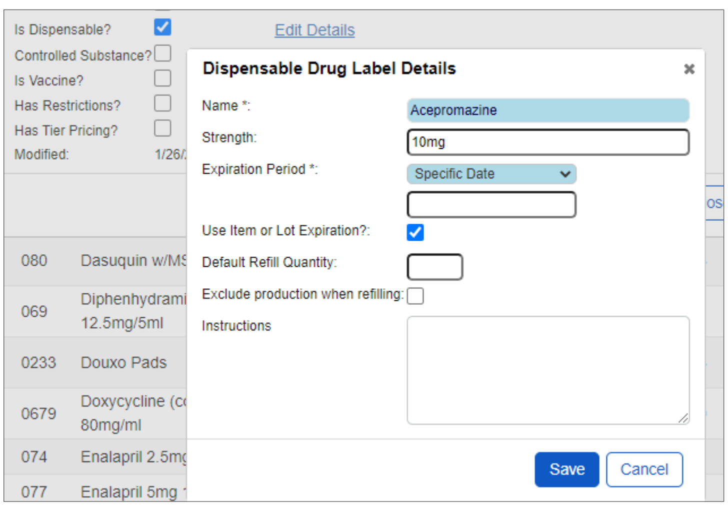
3. Click on the **Edit** pencil to the left of the item.
4. Click on **Edit Details** to update **Name, Strength, Expiration Period, Default Refills, Exclude from production when refilling** and **Instructions**.



5. Click **Save**.

Verify Vaccines

1. Verify Vaccine items in the Advanced Search Options section.
2. Uncheck Include All and check the **Include Vaccines** box.
3. Click on the **Edit** pencil to the left of the item.
4. Click on **Edit Details** next to **Is Vaccine** box to edit vaccine name, manufacturer, vaccine type, dosage type, license information and serial number.

Verify Taxable

1. Under Advanced Search Options, uncheck Include All and check the **Include Taxable Items** box.
2. Review listed items to ensure they should be taxed.

Check Procedures

To verify Procedures, go to the **Menu > Settings > Products & Services > Procedures.**

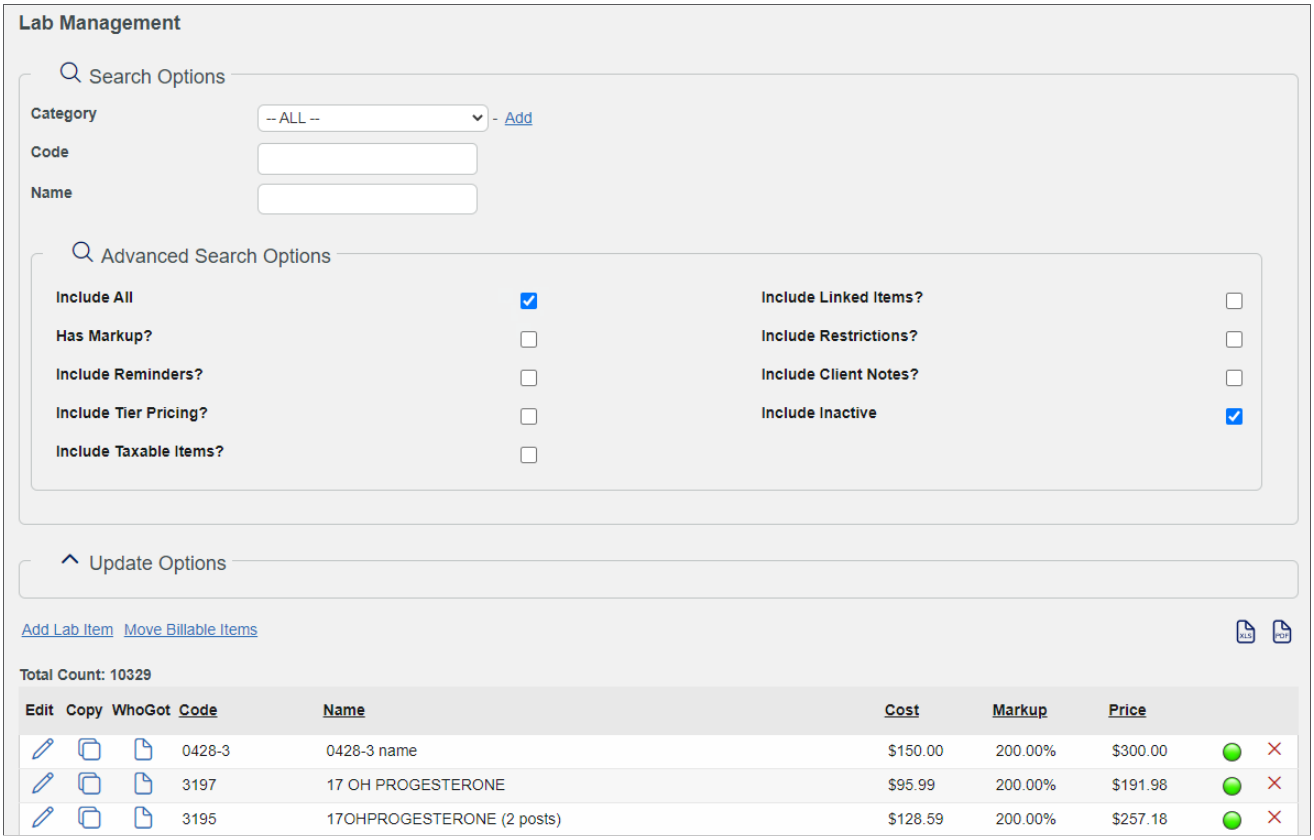
1. Review the **Code, Name, Cost, Markup, Price, Service Fee,** and **Active** status.
2. Click on the **Edit** pencil to the left of the item to verify the **Category.**

Edit	Copy	WhoGot	Code	Name	Common Name	Cost	Markup	Price	Service Fee		
			10017	10% OFF		($1.00)	-0.97%	$0.01	$0.00		
			007	Abdominocentesis		($1.00)		$45.25	$2.00		
			607	Abscess, drain/flush		$24.89		$45.90	$2.00		
			M010	Acid Fast Stain		$60.62		$121.24	$0.00		
			0007	Adult Canine Package B Discount		$0.00		($44.00)	$0.00		
			0006	Adult Feline Package A Discount		$0.00		($36.00)	$0.00		

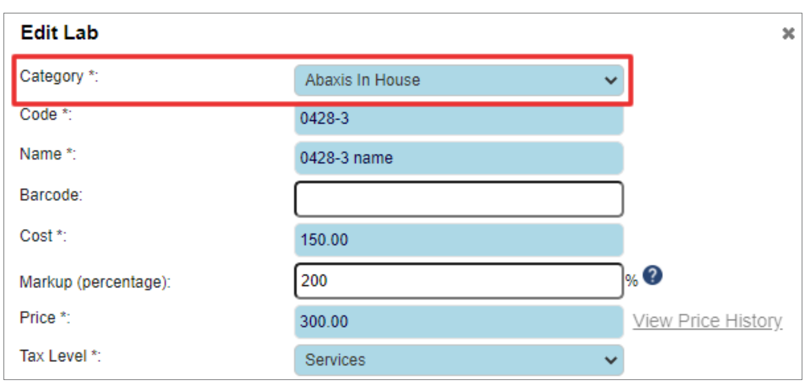
3. Just like with Inventory, use the **Advanced Search Options** to verify Reminders and Vaccines,
    a. Clear the **Include All** check box.
    b. Check **Include Reminders** (Callbacks will also be listed as a Reminder).
    c. Click the **Edit** pencil next to procedures listed and verify the correct reminder is listed.
    d. Return to Procedures and repeat step a, then check **Include Vaccines**.
    e. Click on the **Edit** pencil to the left of the item, click on **Edit Details** next to **Is Vaccine** box to edit vaccine **Name, Manufacturer, Vaccine Type, Dosage Type, License Information,** and **Serial Number.**

Labs

To verify Lab, click on **Menu > Settings > Products & Services > Procedures**.



1. Review the **Code, Name, Cost, Markup, Price** and **Active** status.
2. Click on the **Edit** pencil to the left of the item to verify the **Category.**



3. Under Advanced Search Options, uncheck Include All.
4. Check **Include Reminders.**
5. Click on the **Edit** pencil next to the item. Verify the correct reminder is listed. Callbacks will also be listed as a Reminder.

Packages

To verify Packages, click on **Menu > Settings > Products & Services > Packages.**

Edit	Copy	Print	Code	Name	Common Name	Active	Delete
			23a	Abaxis			
			ACP	Adult Canine Package	Adult Canine Package		
				At Home Fecal Collection			
				Canine Complete Care Example			

1. Review the **Code, Name**, and **Active** status.
2. Click on the **Edit** pencil to the left of the item to verify the contents and prices of the Package items.

Employees

In this section, you will verify employee information.

1. Click on the **Menu > Settings > Employees > Employees.**

Employee Management - Add a New Employee

Edit	Name	Email	Role	Last Login	Date Created	Date Modified	Account Locked	Active	Delete
	Gwen Smith		Group Owner	5/25/2022 9:02:31 AM	10/25/2021 3:08:00 PM	5/25/2022 3:11:25 PM			
	Jenny Smith		Business Owner	5/19/2022 10:50:01 AM	11/5/2021 9:29:39 AM	5/19/2022 10:50:01 AM			
	Jeremy Smith		Business Owner	10/27/2021 4:32:50 PM	9/28/2021 9:49:56 AM	1/28/2022 10:44:55 AM			
	Jessica Smith		Business Owner Veterinarian	5/3/2022 10:03:29 AM	9/27/2021 11:40:00 AM	5/3/2022 10:03:29 AM			
	Ravi Smith		Business Owner	9/30/2021 10:37:25 AM	9/28/2021 9:48:06 AM	1/28/2022 10:44:55 AM			

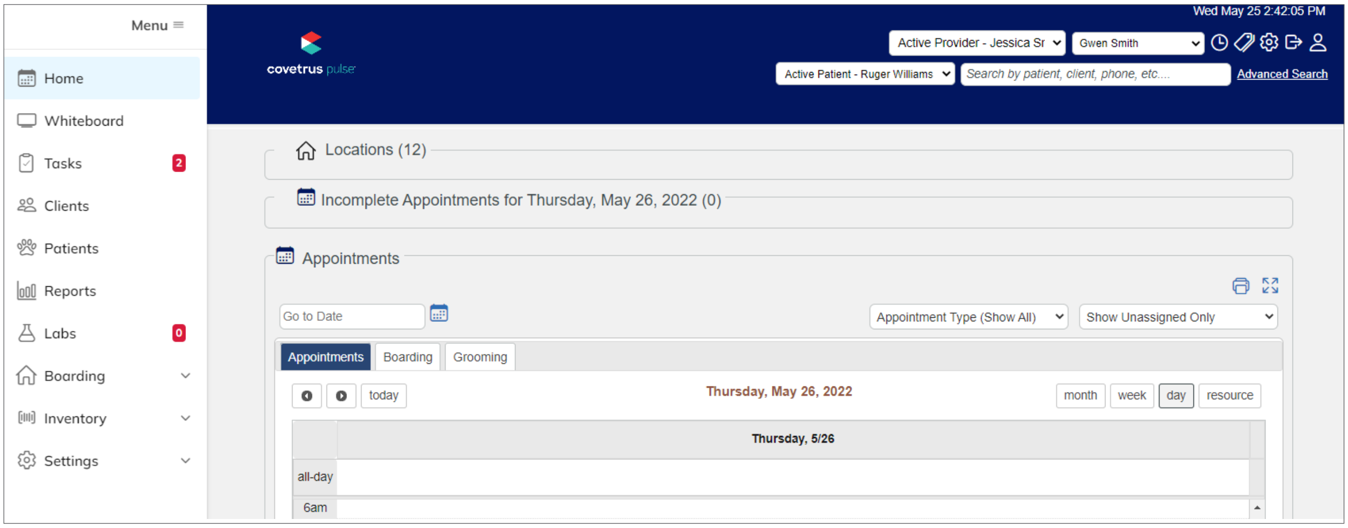
2. Select any employee to review. Verify all data is correct.
3. Assign roles and setup login information for any users that will be assisting you during the setup process.

Appointments

Follow the steps below to review appointments.

***Disclaimer**: Depending upon the date your data was pulled, not all future appointments will match your future appointments scheduled.*

On the **Home** screen, appointments will be displayed in a single **Migration** column.



Use the **arrows** to toggle between days. **Go to Date** will allow you to bring up a specific date. Hover over the appointment to verify appointment information.