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Introduction

Welcome to the New Edition of AVImark User's Manual. We're pleased to introduce you to this informational guide to all of the task-orientated functions and window views within the AVImark software. Our goal is to make your experience with learning the AVImark software as quickly and easily as possible. The AVImark User's Manual and the F1 help file is now loaded with the most up to date AVImark functions as well as views and contain all the information that you will need to quickly navigate through the program and learn its various functions to suite your clinical or hospital needs.

Using this Manual

This manual works like a reference. Start with a task or a topic that you need help on and then look it up in the Table of Contents or Index. When you have found the topic you need help on, follow the step-by-step instructions. Sometimes you will be referred to additional information found in the F1 Help.

As you utilize this manual you will notice that each chapter contains images within the left margin, these icons represent specific keystrokes, shortcut buttons and additional references.



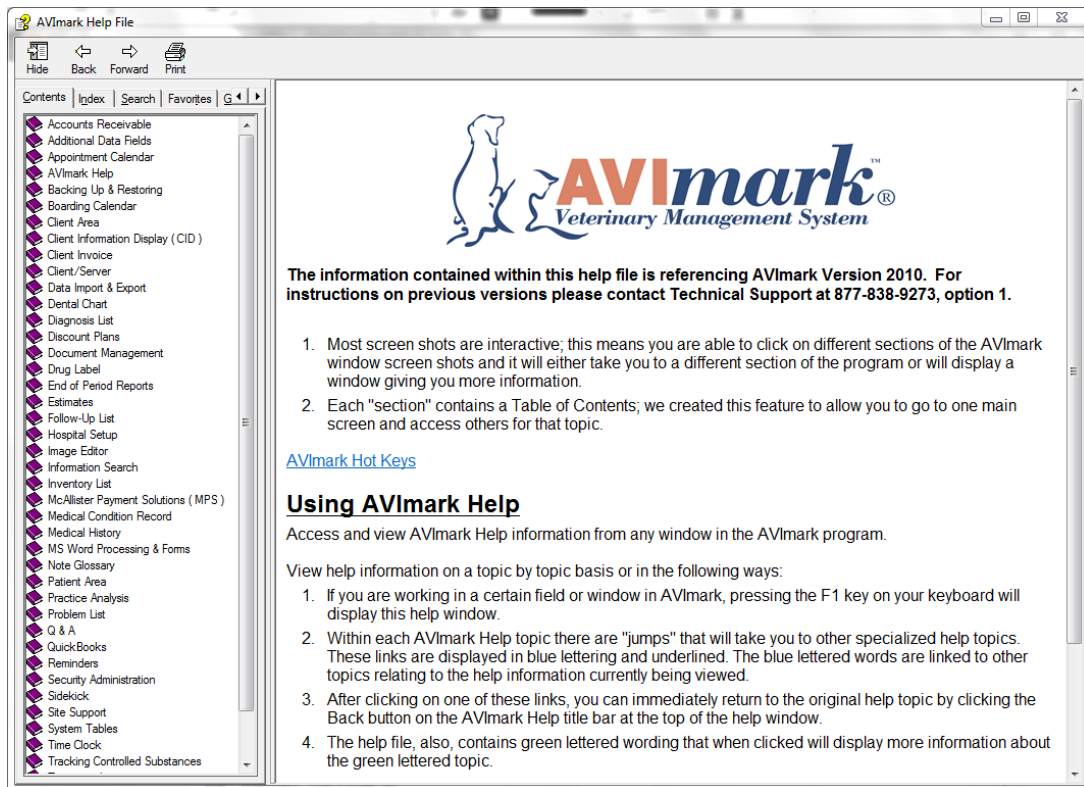
Important information and tips



For more information, search the F1 Help Index

Using the F1 Help Index

Access the F1 Help by using the F1 key anywhere in the AVImark program. Use the Contents tab to browse through all of the manual topics. Or use the Search tab to search the Help for a specific topic.



Video Tutorials and other sources for help

McAllister Software Systems offers a variety of ways to get help and training in using the AVImark practice management software including video tutorials, web-based and telephone training, Authorized Training Representatives, and regional seminars. Visit our website at www.avimark.net to see what's available to you.

Open Source Libraries

AVImark is proud to use the following open-source libraries:

The Indy Project
<http://www.indyproject.org>

Jedi Code Library
<http://sourceforge.net/projects/jcl/>

Jedi VCL for Delphi
<http://sourceforge.net/projects/jvcl>

Portable Network Graphics Delphi
<http://pngdelphi.sourceforge.net/>

TDBF
<http://tdbf.sourceforge.net/>

TurboPower Abbrevia
<http://sourceforge.net/projects/tpabbrevia/>

TurboPower Async Professional
<http://sourceforge.net/projects/tpapro/>

TurboPower B-Tree Filer
<http://sourceforge.net/projects/tpbtreefiler/>

TurboPower Essentials
<http://sourceforge.net/projects/tpessence/>

TurboPower LockBox
<http://sourceforge.net/projects/tplockbox/>

TurboPower Orpheus
<http://sourceforge.net/projects/tporpheus/>






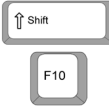





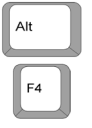


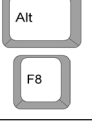


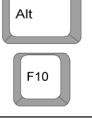





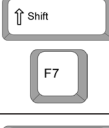


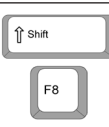





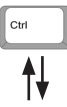
TurboPower SysTools
<http://sourceforge.net/projects/tpsystools/>

TurboPower XML Partner
<http://sourceforge.net/projects/tpxmlpartner/>



SQL, or sequel, is short for Structured Query Language: SQL is a computer language for data retrieval and manipulation. Using a SQL database presents the data in a standardized way so that your data can be analyzed by other applications besides AVImark. For instance, there are tools and software available for creating your own customized information searches and reports allowing you to do your own comprehensive data analysis outside of AVImark through the SQL software. The motivation behind SQL is to allow customers more flexibility in data management, retrieval and manipulation. This kind of flexibility is not available in AVImark's Classic or Client/Server versions that use non-SQL database systems.

AVImark Hot Key Cheat Sheet

	Help	 <i>Space</i>	Select		Boarding
	New		Close Client File		Zoom
	Change		Field to Field		Work List
	Remove		Choose Client/Patient		Close AVImark
	Notes		Doctor's Instructions		Change Patient Status
	Check In		Patient Chart		Whiteboard
	Choose Treatment		Diagnosis List		Invoice Instructions
	Post		Release Patient		Iventory List
	Appointment Calendar		Additional Data Fields		History Mode
	Accounting		E-Travel Sheet		
	Refresh		Scroll through clients Numerically		
	Log-on		Scroll through clients alphabetically		

CHAPTER 1: HOSPITAL SETUP

In this chapter you will learn about...

- » Verifying Hospital Information on page 1
- » Entering Demographics and Default Hospital Information on page 2
- » Values for Invoicing on page 3
- » Values for Statements on page 8
- » Values for Documents on page 10
- » Values for Reminders on page 12
- » Appointment and Boarding Values on page 16
- » Miscellaneous Hospital Values on page 18
- » Specify System Information on page 21
- » Set Advanced Hospital Options on page 26

Verifying Hospital Information

When you begin using AVImark, you will first need to access Hospital Setup and verify the Hospital Information is correct. The Hospital Information area is encrypted and will not allow you to make changes without help from Technical Support. Call the Support department for assistance at 877-838-9273. It is from Hospital Setup that you will specify certain default information such as tax rates, discount values, and so on. Information about your hospital is entered into a series of “folders”, each with its own Folder Tab at the top of the AVImark Hospital Setup display.



For clinics setting up Users & Security or those that have already set up security, it is highly recommended that hospital values be defined under the Advanced Options area. By using the Advanced options, hospital values can be defined for each user or site.

- On the Client Information Display (CID), open the **Work with** menu and click **Hospital Setup** to display the Hospital Setup window.

Entering Demographics and Default Hospital Information

In addition to verifying the correctness of the Hospital Information, it is from the Demographics window where you will specify each of the “Default Values” that will be entered automatically when a new client is added to your files.

DEA no.

AVImark provides controlled substance reports to meet the requirements for Alabama, California, Kentucky, Michigan, New York and Oklahoma. The hospital’s DEA number will need to be entered for the use within these reports.

- Type the correct **DEA** number for the hospital.

Slogan

AVImark allows you to enter a Slogan to be printed at the top of all Invoices.

- If appropriate, type a Hospital **Slogan** to be printed on Invoices.

Logo

AVImark allows you to link a Logo to be printed on Invoices. This must be either a bmp, jpeg, or tif file and must be stored in the \PHOTOS folder of the server computer.

- If appropriate, type the **Logo** name without the extension.

When printing the invoice the quality must be set to Picture in order for the logo to be included on the invoice.

Logo Margins

The Logo margins allow you to specify appropriate margins to position the logo on the invoice in inches (use decimal values such as 2.25 for 2 1/4 inches). This will place the logo to a area on the invoice so as to not interfere with the printing of the patient’s picture if applicable.

- If appropriate, enter the **Left** and **Top** margin for placement of the Logo.
- If appropriate, click **Border** if you wish to place a Border around the Logo.

Web site

You may specify your clinic’s web site in this field giving you the capability to merge into MS Word or Open Office documents. This information will merge by using the merge word <web-address> on your documents.

- If appropriate, type the Hospital’s **web site** address.

Default City, State and Zip code

This is the name of the city, state and zip code you wish to be entered each time you add a new client to your records. This would typically be the information where most of your clients reside.

- Type the **City** name.
- Use the TAB key to move to the **State** field and type the **2-letter abbreviation** for the **State**.
- Use the TAB key to move to the **Zip** field and type the **Zip Code**.

Default Area Code

This is the Area Code you wish to be automatically assigned to new clients.

- Type the **Area Code**.

Default Company Number

This will be the default Company number which will be assigned to newly added clients. AVImark automatically sets this value to 01. It is recommended that you leave this value set to 01 for your regular client records.

Default Client title

This will be the title you wish to be entered automatically for new clients.

- Type the **Client title**.

Auto-assign Client and Patient folder numbers

When selected, these options cause AVImark to automatically assign newly added clients/patients a folder number. These folder numbers are assigned in a simple “one-up” fashion, starting with 1. You may however, choose to start your folder numbers at any number you wish.

- If appropriate, select **Client folder no.** and/or **Patient folder no.**
- If appropriate, use the **Starting at** box, type or select the folder number you wish to start from.

Zip code lookup length (U.S. and Canadian usage)

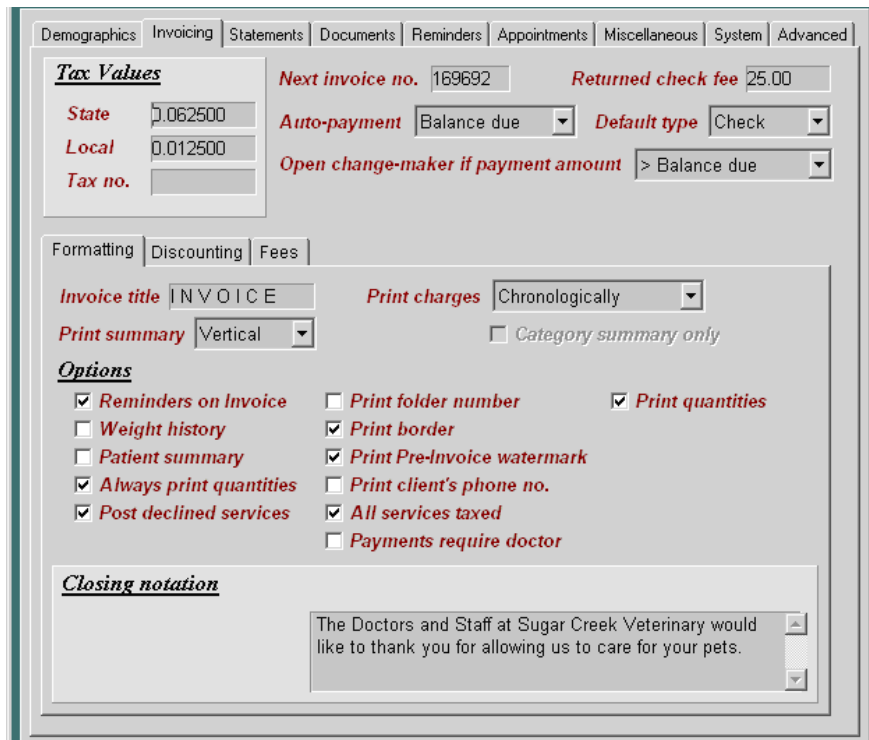
This field defaults to 5 characters, which is the normal length for U.S. clinics, but because of the length and character assignment being different in Canada this field can adapt to 3 characters allowing the Canadian clinics full use of the feature. **(There are utility programs available to help change your Zip Code System Table to the new length. Please call technical support at 1-877-838-9273 for assistance in running Zipto Three and DelDup.)**

	<p>To learn more about: Hospital Demographics</p>	<p>Search the Help for: Hospital Demographics; Demographics</p>
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Values for Invoicing

Under this tab the values for pricing, discounting, taxing and other monetary issues for your clinic will be determined. The window is divided into an upper and lower section; the lower section having three sub-tabs specifying Formatting, Discounting and Fees.

- On the Hospital Setup window, click the **Invoicing** tab to display the Invoicing Values set up folder.



Tax Values

In these fields you will set the state (GST) and local (PST) tax rates along with your tax registration number for your area. If, however, you live in an area where more than one set of rates apply, you will need to become familiar with “*CHAPTER 2: SYSTEM TABLES, Tax Table*”. If you have set up a Tax Table and linked the various tax areas with appropriate Zip Codes, clients will be taxed accordingly. If you sell taxable items to a client whose Zip Code is either not in the Zip Code table or does not have a Tax Area linked to it, the client will be charged whatever tax rates you have assigned here.

- Specify the correct tax rates using decimal values.

Canadian Harmonized Tax

For those practices located in Canada which are required to charge a Harmonized Tax (HST) an HST field is available. For those clinics NOT required to use HST; the GST and PST fields are still available and these users will NOT make any changes to their current setup. When entering a value in the HST field, will automatically set the GST and PST amounts to 0. This is to safe guard inadvertently over taxing clients.

Kenai Peninsula Borough, Alaska Sales Tax Cap

According to the Kenai Peninsula Borough, Alaska tax code, businesses are only allowed to charge tax on the first 500.00 of an invoice. To help make this compliance easier for AVImark users, we have added a new Advanced Option – “Tax First \$500 Only”. If you fall under this rule, you will need to open the Advanced Options (the wrench speed bar button) and set the option for “Tax First \$500 Only” to True. This will only apply your tax rate to the first \$500 of the invoice and after that will not apply any tax.

IMPORTANT: If you find it necessary to remove part of the invoice you MUST remove the entire invoice from medical history and accounting and reapply it. Without removing all entries from the invoice, the tax will not be calculated correctly on your reports

Next invoice no.

This is a count forward feature that allows you to enter a beginning invoice number at will.

- If appropriate, enter a **Next invoice number**.

Auto-payment

You are able to specify how you want AVImark to prompt you for payments on posted charges, either “(none)”, for the “Invoice amount”, or for the “Balance due”.

- Use the **Auto-payment** drop-down list and select how you wish to be prompted for payments.

Open change-maker if payment amount

Payments taken that are greater than the Invoice total for a client that has an outstanding balance does not have to be applied to the entire balance. If the option “> *Invoice total*” is selected and a client makes a payment that is greater than the invoice total, but less than the outstanding balance, the Change-maker window will be prompted, allowing change to be returned to the client, rather than applying the change to the outstanding balance.

The “> *Balance due*” option will allow AVImark to perform as it has previously. The Change-maker window will not be prompted when a payment is made that is greater than the invoice total but less than the outstanding balance. The change would be automatically applied to the outstanding balance. The “*never*” option will prevent the Change-maker window from being prompted even when the client has no outstanding balance and a payment is made that is greater than the invoice total.

- Use the **Open change-maker if payment amount** drop-down list and select how you wish to use the Change-maker.

Returned check fee

This is the amount you would like to charge the client when a check is returned. The fee is automatically added to the clients balance when you return a check in the accounting window of the client.

- Specify the amount to be applied for returned checks. For example: (20.00).

Default type

Using the “Default type” menu, you may specify the type of payment you wish AVImark to default to; Check, Cash or None. If “None” is chosen as the default, AVImark requires you to manually select the payment type before the payment can be entered. This is intended to improve accuracy of entering different payment types.

- Use the **Default type** drop-down list and select the default payment type.

Sub-tab, Formatting

Invoice title

You may specify an alternate title for your invoices using up to 13 characters. For example: (RECEIPT). If no title is entered, the word INVOICE will be printed.

- If appropriate, type an alternate **Invoice title**.

Print summary

AVImark gives you the ability to print invoice totals in a ‘Vertical’ or ‘Horizontal’ manner.

- Use the **Print summary** drop-down list and select the manner you wish to print invoices.

Print charges


AVImark gives you a few options when printing charges on the invoice. You may; “Group by provider” (which will organize line items by doctor), “Group by category” (which will organize and total by category name), print “Chronologically”, or, print “As Shown” (how charges are displayed in Medical History). When “Group by category” is selected, the “Category summary only” option will become active by appearing in red. With this option checked, the printed invoice will show charges by category only. No line items will be listed.

- Use the **Print charges** drop-down list and select how you wish to print charges on the invoice.

Options

From this area of the Formatting sub-folder, AVImark allows you to choose what information you would like displayed on the invoice. You may select as many options that you wish.

- Select the **Options** you wish to have printed on the invoice.

	<p>To learn more about: Invoice options and their functions</p>	<p>Search the Help for: Invoicing Tab</p>
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Closing notation

In this field, AVImark allows you to enter notes that you want to periodically appear at the bottom of the client’s invoice. A different Closing Notation may be specified for each Company within AVImark.

- If appropriate, type a **Closing notation**.

Sub-tab, Discounting

Non-discounted prices

This option allows you to have AVImark print the regular (non-discounted) prices for discounted services and/or items on the client invoice. In this case, you will also want to make sure to check the next box, “Print total discount” so that the amount of the discount is printed on the invoice summary line below the list of charges.

- If appropriate, select **Non-discounted prices**.

Print total discount

This option allows you to have the total of all discounts printed on the invoice.

- If appropriate, and if **Non-discounted prices** is checked, select **Print total discount**.

Line item discounts

With this option checked, AVImark will list retail, discount amount and net price as column headings in the line item section of the invoice. When using this option, ensure the “Non-discounted prices” box is not checked.

- If appropriate, select **Line item discount**.



Cash discount %


This field allows you to specify a percentage that you allow a discount for cash (or check) payments. If, once the payment has been entered in the payment window, you wish to change the payment type; AVImark will recalculate the amount due. If the payment (and appropriate cash discount amount) is already recorded on the invoice, you will need to delete these before you change the payment type.

- If appropriate, enter a **Cash discount** percentage using a whole number.

Discount rates

When you want to specify discounts for certain classes of clients on certain treatments and/or inventory items, you will do so on this display. AVImark allows you to give clients a class number for the sole purpose of determining what discount rate the client is to receive. For example, you would gather a homogenous group of clients together (e.g. senior citizens) and give that group a specific class number. By default, AVImark assigns a class number of 1 to all clients. There is no limit to the number of client classes you can create. In addition to clients having a class number, all treatments and inventory items can have a class number. Unlimited class numbers can also be created for treatments and items. AVImark calculates discounts to clients based on how you define which classes of clients are to receive what discount percentage for each treatment and/or inventory class. Inventory and Treatments may also be discounted on a cost plus basis for any given client class.


- In the **Discount rates** section, **right-click** and from the shortcut menu click **New** to display the New Discount Rate window.
- Use the **Client Class** drop-down list and select a **Client Group**. These are the groups that are set up in System Tables.
- To create a new Client Class from this window, click the **Paper** button  next to the **Client Class** field.
- From the **New Client Discount Class Entry** window, enter a numbered **Code** and a **Discount Class** name.
- Click **OK** and select that **Client Group** from the **Client Class** drop-down list. This will add the New Client Class to System Tables as well.
- Use the **Discount Class** drop-down list and select the **class** of treatments and/or items which are to be discounted for the selected Client Class. Treatments and inventory must be assigned these client discount groups from within your Treatment and Inventory list.
- To create a new Discount Class from this window, click the **Paper** button  next to the **Discount Class** field.
- From the **New Discount Class Entry** window, enter a numbered **Code** and a **Discount Class** name.
- Click **OK** and select that **Discount Class** from the **Discount Class** drop-down list. This will add the New Discount Class to System Tables as well.
- In the **Rate** box, type or select the correct discount percentage.
- If appropriate, select the **Cost Plus** and click **OK**.

 You may use a negative discount percentage value to effectively surcharge certain classes of clients.

Cost Plus Discounts

The “Cost Plus” field allows you to tell AVImark whether or not you would like a certain client class to be charged your cost for a certain Treatment and/or Inventory class or cost PLUS a specified percentage. If the “Cost Plus” option is checked and a zero has been specified in the “Rate” field, AVImark will charge the client the Markup Cost of the item and the Cost of the treatment. With the “Cost Plus” option checked and a percentage specified in the “Rate” field, AVImark will charge the client the Markup Cost of the item, the Cost of treatment PLUS the specified percentage.

- In the Discount Rates section, select the correct Client Class.
- **Right-click** and from the shortcut menu click **Change** to display the Change Discount Rate window.
- To charge the client **Cost** only, type or select **0** in the **Rate** box and select **Cost Plus**.
- To charge the client **Cost Plus**, type or select the correct percentage in the **Rate** box and select **Cost Plus**.

	To learn more about:	Search the Help for:
	Tax Values	Tax Values; Invoicing Tab
	Discount Rate	Discount Rates; Discounting sub-tab


Sub-tab, Fees

Fees

AVImark gives you the ability to add various fees and minimum values to the retail price of inventory items and/or treatments. For these fees to be added, you must specify the appropriate Action Code for each item. For more information on Action Codes, refer to “CHAPTER 4: INVENTORY LIST”

- Using the **First** column, enter the amount you wish to add to the normal price charged for the quantity of items dispensed. If this amount is less then the specified Minimum value, AVImark will charge the minimum amount.
- Using the **Additional** column, enter the amount you wish to add to the normal price charged, AFTER the initial entry of that particular code has been added to Medical History.

Formatting	Discounting	Fees	
<u>Fees</u>	<i>First</i>	<i>Additional</i>	<i>Minimum</i>
<i>Prescription</i>	16.15	16.15	16.15
<i>Handling</i>	8.95	8.95	10.15
<i>Intravenous Injection</i>	18.50	18.50	20.50
<i>Intra-muscular Injection</i>	17.50	17.50	19.50

 The initial entry of a code must remain un-posted for the Additional fee to be applied to all additional entries of the same code.

- Using the **Minimum** column, enter the minimum amount you wish to charge.
- If appropriate, select **Refund fee on returned items** to refund the fee as well as the item price when

the item is returned.

	To learn more about: Inventory/Treatment Fees	Search the Help for: Fees; Fees sub-tab
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Values for Statements

From this tab, AVImark lets you set the values for printing of your detailed statements at the end of any period (usually once a month).

- On the Hospital Setup window, click the **Statements** tab to display the Statements Values set up folder.

Service charge

This field allows you to specify the service charge you wish to charge for overdue accounts. This amount will need to be entered as a decimal. For example: 0.015 equals 1½%.

- Enter the amount you wish to charge for overdue accounts.

Minimum

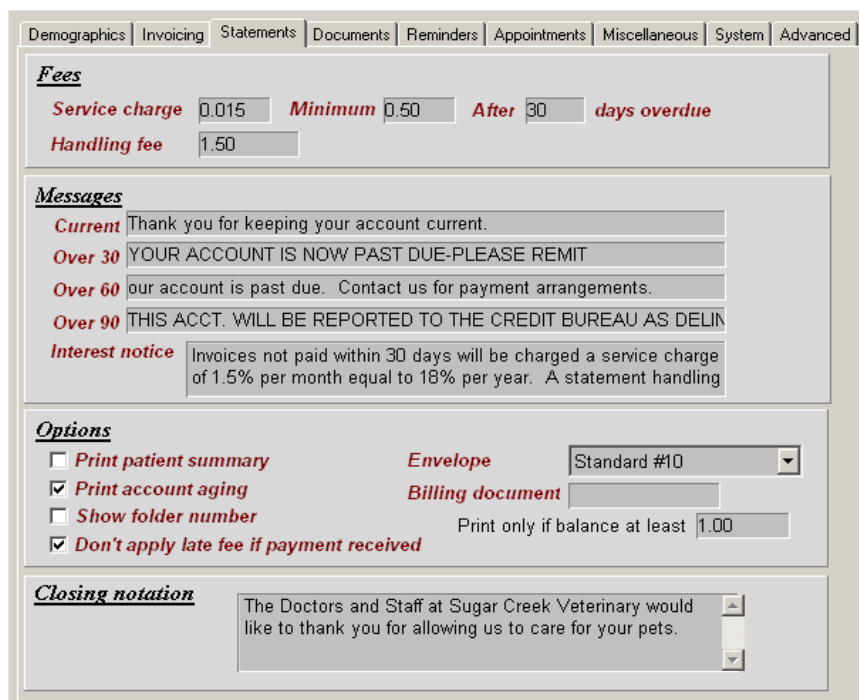
This is the amount you wish AVImark to charge should the Service Charge be less than the minimum value specified.

- If appropriate, enter a **Minimum Service Charge**.

Days overdue

This field allows you to specify the number of days after which an account will have service charges applied. AVImark only charges interest on the number of days greater than what is specified here.

- Enter the number of days after which an account will have service charges applied.



The screenshot shows the 'Statements' tab in the AVImark Hospital Setup window. The 'Fees' section is active, displaying the following settings:

- Service charge:** 0.015
- Minimum:** 0.50
- After:** 30 days overdue
- Handling fee:** 1.50

The 'Messages' section contains the following text for different overdue periods:

- Current:** Thank you for keeping your account current.
- Over 30:** YOUR ACCOUNT IS NOW PAST DUE-PLEASE REMIT
- Over 60:** our account is past due. Contact us for payment arrangements.
- Over 90:** THIS ACCT. WILL BE REPORTED TO THE CREDIT BUREAU AS DELIN
- Interest notice:** Invoices not paid within 30 days will be charged a service charge of 1.5% per month equal to 18% per year. A statement handling

The 'Options' section includes the following settings:

- Print patient summary
- Print account aging
- Show folder number
- Don't apply late fee if payment received
- Envelope:** Standard #10
- Billing document:** [Empty field]
- Print only if balance at least: 1.00

The 'Closing notation' section contains the text: "The Doctors and Staff at Sugar Creek Veterinary would like to thank you for allowing us to care for your pets."

Handling fee

AVImark allows you to add a fee to every client that owes you money whenever you print monthly statements, with the following exceptions: If a client has a Client Code "W" (Waive Charge) or the "I" code (Inactive Client), they will not be charged either the service charge or the handling fee. By "Client Code", we are

referring to the “Code” field in the Client area of the Client Information Display. For more information on “Client Codes”, refer to “*CHAPTER 6: CLIENT AREA*”.

- Enter the amount of the Handling fee you wish to apply to every account that is being billed.

Messages

AVImark will print an appropriate message on a client’s statement depending on how many days the client has an outstanding balance; either current, over 30, over 60, or over 90 days. You may type any message you feel appropriate for these situations.

- If appropriate, type statement messages for the different situations.

Options

This area of the Statements folder allows you to select what information you would like displayed on the statement. You may select as many options that you wish. The following is a list of the available options and their meaning:

- Select the **Options** you wish to have displayed on the client’s statement.

Interest notice

This notice may be any message you would like to be printed at the bottom of the client invoice any time the client charges their balance. In addition, AVImark will print this message at the bottom of all statements.

Print patient summary

This option allows you to print a patient by patient summary of charges on each statement.

Print account aging

AVImark gives you the ability to print an aged account summary at the bottom of each statement showing what portion of the client’s balance is current, over 30 days past due, over 60 and so on.

Show folder number

This option allows you to print the client’s folder number on the statements instead of the client’s account number.

Don’t apply late fee if payment received

If you have received a payment of any amount from the client within the number of days specified in the “Days overdue” field, AVImark will not charge a service charge.

- If appropriate, select **Don’t apply late fee if payment received**.

Envelope

This option allows you to adjust the statement format to fit the envelope format you choose.

- If appropriate, use the **Envelope** drop-down list and select the correct envelope type.

Billing document

In this field, you may type the name of a Microsoft Word® document that you would like AVImark to print along with any unpaid invoice. This document will only print if the client’s balance exceeds the amount entered in the “Print only if balance at least” field. There is a default setting of 1.00 but you may change this amount if necessary.

- If appropriate, type the name of the Microsoft Word® document you wish to print.
- Enter a dollar amount in the **Print only if balance at least** field.

Closing notation

In this field AVImark allows you to enter notes you want to appear at the bottom of the client’s monthly

statement. A separate Closing Notation may be entered for each Company within AVImark.

- If appropriate, type a **Closing notation**.

	To learn more about: Statements Tab	Search the Help for: Statements Tab
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Values for Documents

The Documents folder allows you to specify the size and quantity of various documents and labels that AVImark will print for you. You will also use this screen to tell AVImark the name of the MS Word document you want to use for your Rabies certificate.

- On the Hospital Setup window, click the **Documents** tab to display the Documents Values set up folder.

Drug Labels

These fields allow you to specify the true size of the height, width, font size, and the left/top margins (in inches) for the prescription labels you will be using.

- Using the **Height, Width, Left margin, Top margin** and **Font size** fields, enter the correct size of your Drug labels.

Sequence number

This field allows you to enter a beginning label sequence number (or prescription number) to be printed on all prescription labels. AVImark will automatically sequence from the number entered.

- If appropriate, enter a beginning **Sequence number**.

Include

The Include area allows you to specify what information will be displayed on the prescription label. The option

“Doctor’s license” is specific for New Jersey clinics and when selected, cannot be used in conjunction with the DEA #. Just below the option check boxes, you also have the option to include on the label any brief note that will be printed at the bottom of the label. For example: “For veterinary use only”, or “Keep out of reach of children”.

- Select the **Include** options you wish to have displayed on the prescription labels.
- If appropriate, type a brief note to have displayed at the bottom of the label.

Copies to print

This area allows you to specify the number of copies of the daily deposit slip, client invoice, rabies certificate, and patient charts to be printed at the time the invoice is printed. Also, you may specify the number of drug labels you want printed at a time.

- Enter the number of copies you wish to have printed for each of the items.

Photographs

These fields allow you to specify the margins and dimensions of printed photos. These dimensions only apply when printing images from the AVImark Image Editor window.

- Using the **Left margin, Top margin, Width, and Height** fields enter the dimensions for printed photos from the AVImark Image Editor.

Patient Labels

These fields allow you to specify the height, top and left margins, and the font size settings for your patient labels. You may also choose to include basic client or patient information. When using labels that are one inch in height and you wish to include client information, check the option ‘New Page after Client Info’. This will allow an automatic page break after the client information is printed and force the patient information onto a second label.

- Using the **Height, Font, Top and Left margin** fields enter the correct size of your Patient labels.

Mailing labels

These fields allow you to specify the height, top and left margins settings for your mailing labels.

- Using the **Height, Top and Left margin** fields enter the correct size of your Mailing labels.

Referral letter

This field gives you the ability to specify a Microsoft Word® Document that you would like printed for each referring client included on the AVImark Referral report. These documents would be letters you want to send to referring clients (not clients who have been referred) thanking them for referring new clients to you. Understand that the AVImark Referral Report only includes new clients that have been added to your system AND that have received an invoice during the period of time reported. Therefore, AVImark clients who have referred these new customers to you would be the clients receiving the thank-you letters. In order for these documents to be addressed to the referring client and be worded appropriately regarding the referred client, you will need to be familiar with the AVImark merge words relating to referral correspondence. These special words are listed in “*CHAPTER 23: WORD PROCESSING*”.

- Type the **name** of the Microsoft Word® Document that you wish to have printed for each referring client included on the Referral Report.
- Select **Print?** To have the document printed when printing the Referral Report.

Check-in

AVImark gives you the ability to specify a Microsoft Word® document that will be printed when you check-in a patient from either the Boarding Calendar or the CID. You may specify multiple documents by choosing from a list of client education documents or documents which you have created. This is accomplished by entering the document names into this field separated by commas. When a patient is checked-in you will be prompted by a

screen to select a document to print. This feature will default to the first document that is listed in this field.

- Type the **name** of the Microsoft Word® Document(s) that you wish to have printed when you check-in a patient.

Rabies certificate


If this field is left blank (default), AVImark will print the rabies certificate form that is included with the AVImark program. You may however, customize your own Rabies certificate using Microsoft Word® and entering the name of the document in this field. This document must be saved in the My Documents folder on the server computer.

- Type the **name** of the Microsoft Word® Document you wish to use for the Rabies certificate, or leave this field **blank** to print the default certificate.

Chart length

AVImark gives you the ability to specify the length of the Patient chart by number of Days, Months, or Visits.

- Enter a **whole number** in the **first** field and then use the drop-down list and select **Days, Months, or Visits**.

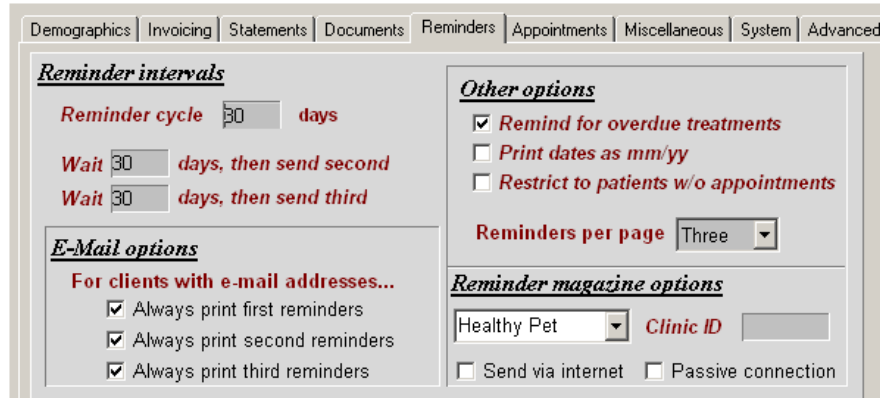
	To learn more about: Drug/Patient Labels	Search the Help for: Labels; Prescription Labels; Documents Tab
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Values for Reminders

The Reminder folder allows you to specify the values in which to print your Reminders. In addition, if you choose to send Reminders through a source other than AVImark, you will need to specify that information from this folder. Should you need any assistance with setting up your reminder specifications, contact AVImark Technical Support at 877-838-9273.

Reminder intervals

It is from this area that you will tell AVImark the interval in which you wish to print/send Reminders. The “Reminder cycle ___ days” field will be the default setting for the number of days between sending of the first Reminder. For example: If you print Reminders on a monthly basis, you will want to enter either 30 or 31 in this field to represent a typical month. If you send Reminders twice a month, you would want to enter 15 and so on. Next, if you send out second and even third Reminders, you will need to specify the interval days between Reminders in the fields, “Wait ___ days, then send second”, and “Wait ___ days, then send third”. The way this works when sending second and third Reminders is AVImark looks at the date you sent your first Reminder. It then looks back from that date the number of days you specified for your second, and then it looks forward the number of days specified in the “Reminder cycle ___ days”. For your third Reminders, AVImark looks at the beginning date for the second Reminder interval and then looks back the number of days you specified for your third. Then it looks forward the number of days specified in the “Reminder cycle ___ days”. For a better perspective, let’s say on July 1st, you mail reminders to your clients. The “Reminder cycle ___ days” is 15 days, the “Wait ___ days, then send second” is 30 days and the “Wait ___ days, then send third” is 30 days. The first reminders will go to clients that have patients due from July 1st to July 15th. Second reminders will go to clients with patients due from June 1st to June 15th (back 30 days from July 1st, then forward 15 days). Third reminders will be sent to clients with patients due for treatments from May 1st to May 15th (back 30 days from the starting date of the Second Notices then forward 15 days).



Remind for overdue treatments

AVImark gives you the option to include past due treatments on your Reminder cards (or letters) along with the treatments that are due during a given reminder cycle. The past due treatments will only print on the card if the patient was to receive a card anyway for a treatment that is due during the cycle.

- If appropriate, select **Remind for overdue treatments**.

Print dates as mm/yy

This option allows you to have just the month and year of the due treatment printed on the card. Unchecked the date will be displayed as month, day and year.

- If appropriate, select **Print dates as mm/yy**.

Restrict to patients w/o appointments

This option allows you to prevent reminders from being printed for those clients who currently have an appointment on the AVImark Appointment Calendar. When using this option the appointment must fall within the time frame of the printing of reminders and will apply to First Reminders only.

- If appropriate, select **Restrict to patient's w/o appointments**.

Reminders per page

If you are using the page formats used with laser printers that allow either three or four cards per page, AVImark allows you to specify how many reminders to print per page. If you choose "One", AVImark will print either one-up tractor-feed cards or an MS Word document set up as a full size letter.

- Use the Reminders per page drop-down list and select the number of reminders to print per page.

E-Mail options

The AVImark e-mail reminder function allows you to send e-mail messages to those clients who have a valid e-mail address and own animals that are either due or past due for remindable services. You will probably do this in two steps by printing reminder documents for those clients who don't have an e-mail address and then sending e-mail messages to the rest. However, you may not want to depend entirely upon the success of e-mail reminders, especially for clients who have not responded to their first message. In this case, by using these options you may force AVImark to send reminders to due and/or overdue patients, and even to those clients who have e-mail addresses. AVImark checks these boxes as a default setting but you may uncheck them if appropriate.

- If appropriate, uncheck the e-mail option(s) that you wish.

Reminder magazine options

AVImark gives you the ability to export your Reminder information to Healthy Pet®, Paw Print®, Pet Quarterly®, US NetCom®, Jabez Communications® or AVImark Online Reminders. Prior to using this feature you will need

to obtain a hospital identification number from the organization you will be working with. Unless specifically directed by the Healthy Pet®, Paw Print®, Pet Quarterly®, US NetCom®, Jabez® Organizations or AVImark Online Reminders do not put anything in the Clinic ID field.

- Use the **Reminder magazine options** drop-down list and select the correct organization.
- If you wish to use your ISP for sending reminder information to one of the reminder organizations select **Send via internet**.
- If a firewall is installed, select **Passive connection**.

Edit and print reminders with Microsoft Word®

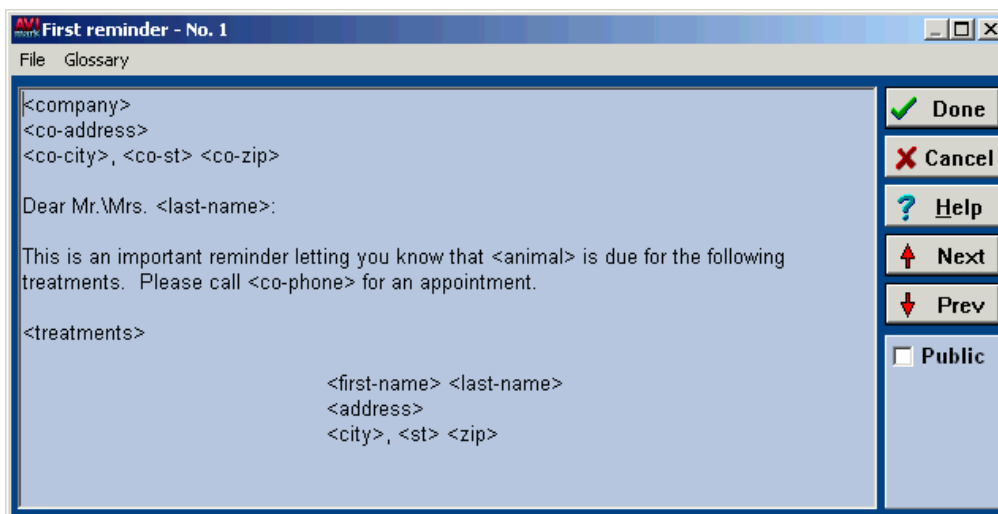
AVImark gives you the ability to use Microsoft Word® documents as your Reminders. In addition, when printing one reminder card for a client who has more than one animal due for treatments during a given reminder cycle, you may specify the name of that document in the “Multi-patient document” field. Using this feature, you will need to select the one per page option. Should you choose to print multiple reminder post cards per page (either three or four), you must first indicate how many reminders per page you want to print. Then you will need to set up your post card document using Microsoft Word® Table support, in a manner similar to that used in the sample reminder documents THREE.DOC and FOUR.DOC, found on the AVImark bulletin board.

- If appropriate, select **Microsoft Word®**.
- If you wish to print consolidated Reminder, type the document name in the **Multi-patient Document** field.

Edit and print Reminders with AVImark

When using AVImark to edit and print Reminders, AVImark gives you the ability to create Reminder text for your first, second, third and consolidated reminders. In addition, AVImark allows you to have up to 10 alternate reminder texts. This feature allows you to choose alternate messages when printing reminders for a prior period or for a particular treatment.

- If appropriate, select **AVImark**.
- Select **First Reminder text** to display the First Reminder text window.



- Type the Reminder text you wish to have printed on the first reminder card. After each line of text, press ENTER. For example:

```

<company>
<co-address>
<co-city>, <co-st> <co-zip>
<co-phone>

Dear Mr./Mrs. <last-name>,

This is an important reminder letting you know that <animal> is due for the following treatments. Please call
<co-phone> for an appointment.

<treatments>

                                <first-name> <last-name>
                                <address>
                                <city>, <st> <zip>

```

- Click **Done** when finished.
- If appropriate, repeat the procedure for the second and third Reminder cards.
- To use one Reminder card for multiple patients, select **Consolidated reminder**.
- Type the Reminder text you wish to have printed on the consolidated reminder card.

```

<company>
<co-address>
<co-city>, <co-st> <co-zip>
<co-phone>

Dear Mr./Mrs. <last-name>,

This is an important reminder letting you know that your pets are due for the following treatments. Please call
<co-phone> for an appointment.

<list>

                                <first-name> <last-name>
                                <address>
                                <city>, <st> <zip>

```

- Click **Done** when finished.
- To create an **Alternate Reminder** notice, select either **first**, **second**, or **third Reminder** text to display the Reminder text window.
- Click **Next**. The appropriate Reminder text window - No. 2 should be displayed at the top of the window.
- Type the text you wish to have printed on the Alternate Reminder card and click **Done**.

Font size and Left margin

When printing Reminders through AVImark you may specify the font size and a left margin.

- Specify the **Font size** you wish to use to print Reminders.
- Specify the **Left margin**. For example; (.75 for ¾ inch).



To learn more about:

Drug/Patient Labels

Search the Help for:

Labels; Prescription Labels; Documents Tab

Appointment and Boarding Values

The Appointments Folder will be used to set the parameters governing your Appointment calendar format and Boarding schedule.

Calendar start and stop times

In these fields you will specify the time you wish to begin and stop seeing patients each day. AVImark accepts both 24-hour military time and standard 12-hour clock designations. For 12-hour format, use a lower case “a” or “p” to designate morning or afternoon times. For example: (8:00a).

- Specify the **Start time**.
- Specify the **Stop time**.

Increment

This field allows you to specify the Appointment Schedule increment between appointments.

- Specify the **Increment** between appointments in minutes.

Default room

You may specify the room in which you would like all new appointments to be scheduled.

- If appropriate, use the **Default room** drop-down list and select a **Default room**.

Sub-tab, View

The Calendar View is the default view you would like the Appointment Calendar to be in when it is opened. Selecting “Daily, Consolidated” will place a specific day’s appointments for all doctors in all rooms in a “stacked” manner on the Appointment Calendar. A more selective view of specific doctors and/or rooms can be accessed by using the drop-down menus on the Appointment Calendar. Selecting “Daily, by Doctor” will show the appointments for a specific day, with separate columns for each doctor in your hospital. Selecting “Daily, by Room” will show a day’s schedule for all rooms in the hospital, with separate columns for each room in your hospital. In this case, if an appointment was not scheduled for a specific facility, it will be displayed in a column called “Not Assigned”. Selecting “Weekly, by Room” will show a week’s schedule for all rooms in the hospital. Appointments appear as colored icons according to the colors assigned to each doctor. Using this view, there is a Quick Edit feature that will display a small Active Appointment window showing the details of any selected appointment.

- Select the **View** option you wish to have displayed when opening the Appointment Calendar.

Sub-tab, Options

Print expanded schedule

With this box checked, all times slots will be shown on the appointment schedule, regardless of whether any appointments have been made for any of the times. If this box is not checked, only the actual appointments will print on the schedule.

- If appropriate, select **Print expanded schedule**.

Post notes to Medical History

With this box checked, any appointment notes that were attached to an appointment will be entered into the Medical History of the patient when the patient is checked into the hospital. The notes will be entered using a code of “Appt\$” as a Type N transaction. If the box is not checked, notes will be posted to the Subjective Tab of the Medical Condition Window.

- If appropriate, select **Post notes to medical History**.

Always show ghosts

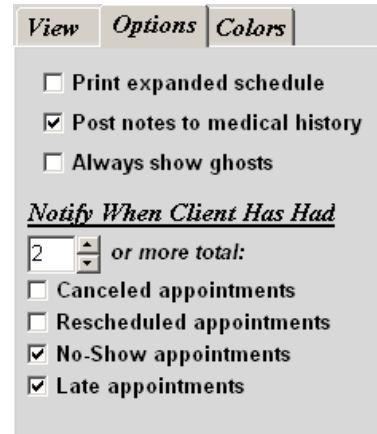
With this box checked, the Appointment Calendar will display all appointments that have been removed and marked as having been kept, cancelled or as no-shows. Deleted appointments will not be shown.

- If appropriate, select **Always show ghosts**.

Notify When Client Has Had

Clients that are frequently marked as a No Show, Late, Rescheduled , and/or Canceling appointments can be flagged to display an alert when they are scheduling new appointments. You must specify one or more of the situations and how many times those instances can occur before the client is flagged with a warning. Once the specified number of occurrences has been reached, the next time a new appointment is created for that client, a warning with the number of instances this client has had will be displayed, as well as a confirmation asking if you would like to proceed with the appointment. Clicking “Yes” will allow the appointment to be created. Clicking “No” will prohibit the new appointment from being created.

- If appropriate, select the desired situations.
- Using the UP and DOWN ARROWS, specify the number of times the situation must occur prior to flagging the client with a warning.



Sub-tab, Colors

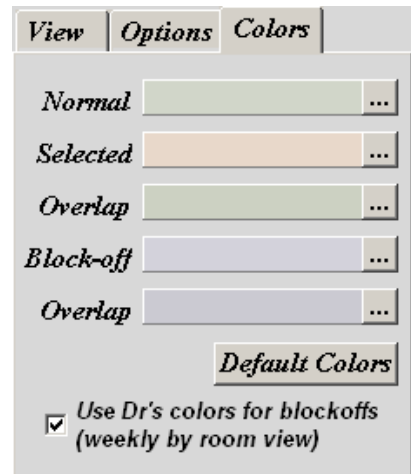
Colors may be selected for different parts and functions of the calendar. Colors for each of your staff are assigned in **Users and Security**. For more information on changing the default colors, refer to “CHAPTER 21: SECURITY ADMINISTRATION”.

- If appropriate, click the **Browse** button next to the function you wish to change a color for.
- If you wish to revert back to the AVImark default colors, click **Default Colors**.

Use Dr’s colors for blockoffs (Weekly by Room view)

Checking this option allows a block off to be displayed in the doctor’s chosen color (as specified in Users and Security) in the Weekly by Room view.

- If appropriate, select **Use Dr’s colors for Blockoffs**.



SOAP Check-in code

When a patient is checked into either the Boarding or the Appointment Calendar when using the SOAP window, the code that is entered here will be entered into medical history. AVImark has set a default code of “VISIT” which you may change if you wish.

- If appropriate, specify a new **SOAP Check-in code**.

Boarding Check-out time

This field allows you to specify your boarding “check-out time”, if any. Use the same 24-hour or 12-hour format as your appointment start and stop times.

- If appropriate, specify a **Boarding Check-out time**.

Doctor Assigned

This field allows you to specify the default doctor for boarding Charges. In other words, fees collected for boarding will be reported in AVImark as having been “performed” by this doctor, unless, of course, it has been changed on the Hospital Schedule.

- If appropriate, use the **Doctor Assigned** drop-down list to specify the default doctor for boarding charges.

Schedule Increment

AVImark can display a schedule of activities based on treatments scheduled for patient visits in the hospital activity scheduler. The boarding Schedule Increment is the default number of minutes scheduled for these activities. For more information regarding hospital scheduling, refer to “CHAPTER 18: BOARDING CALENDAR”.

- Specify the **Boarding Increment** in minutes.

Charge for Boarding

This field allows you to choose how you will charge for Boarding. For a detailed discussion on the different “Charge for Boarding” options, refer to “CHAPTER 18: BOARDING CALENDAR”.

- Use the **Charge for Boarding** drop-down list and select how you wish to charge for boarding.

Normal duration

This field allows you to specify the normal duration of a Boarding reservation.

- Specify the **Normal duration** of a Boarding reservation.

Maximum duration

This field allows you to specify the maximum duration of a Boarding reservation. By setting this value low, for example 30 days, AVImark is able to display the calendar more quickly.

- Specify the **Maximum duration** of a Boarding reservation.


Always show ghosts

With this box checked, the Boarding Calendar will display all appointments that have been removed and marked as having been kept, cancelled or as no-shows. Deleted appointments will not be shown.

- If appropriate, select **Always show ghosts**.

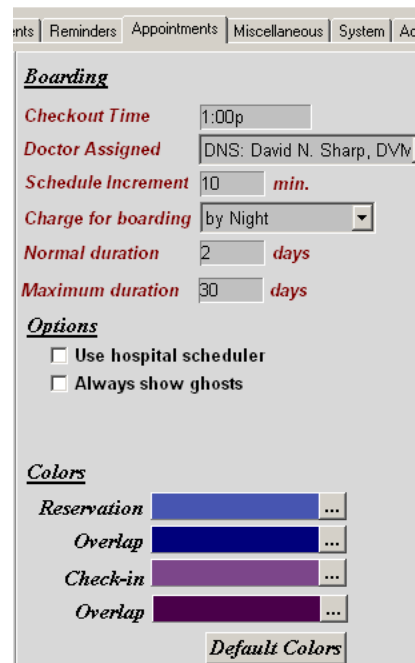
Colors

Colors may be selected for different parts and functions of the calendar.

- If appropriate, click the Browse button  next to the function you wish to change a color for.
- If you wish to revert back to the AVImark default colors, click Default Colors.

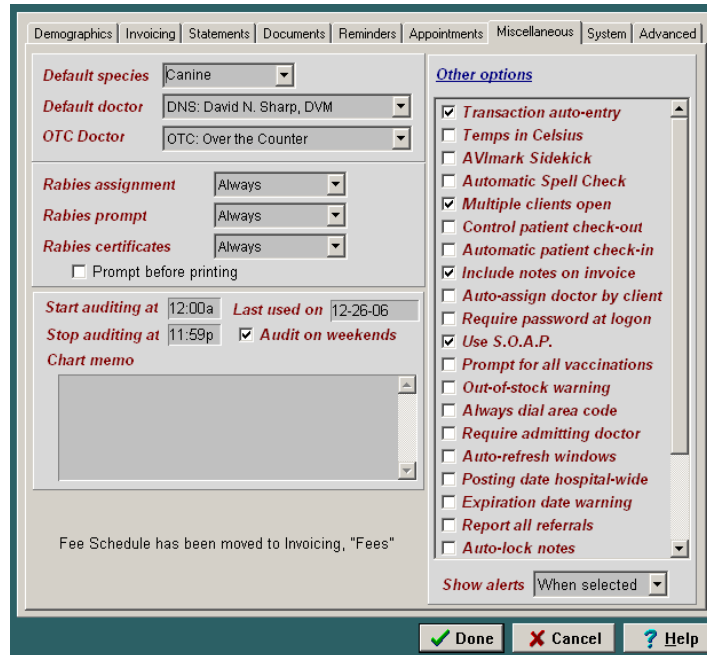
Miscellaneous Hospital Values

This folder is used to specify various values that determine the way AVImark works.



The screenshot shows the 'Boarding' configuration section in the AVImark software. It includes the following fields and options:

- Checkout Time:** 1:00p
- Doctor Assigned:** DNS: David N. Sharp, DVM
- Schedule Increment:** 10 min.
- Charge for boarding:** by Night
- Normal duration:** 2 days
- Maximum duration:** 30 days
- Options:**
 - Use hospital scheduler
 - Always show ghosts
- Colors:**
 - Reservation: [Blue color swatch]
 - Overlap: [Dark Blue color swatch]
 - Check-in: [Purple color swatch]
 - Overlap: [Dark Purple color swatch]
 - Default Colors: [Button]



Default species

This field allows you to specify a default species when checking in new patients.

- If appropriate, use the **Default species** drop-down list and select a **Default species**.

Default doctor


AVImark will assign this doctor as the Preferred Doctor for all new clients. When you treat a patient belonging to a client that has a preferred doctor, AVImark will automatically assign that doctor for treatments being added into the Medical History area. If you do not want AVImark to assign Preferred Doctors for new clients, you will need to select “None assigned”. If the Auto-assign doctor by client option is NOT checked, AVImark will retain the same selected doctor as you enter Medical History, even from client to client. In this case, AVImark will ignore the preferred doctor.

- If appropriate, use the **Default doctor** drop-down list and select a **Default doctor**.

OTC Doctor

This option allows you to select a doctor you want to be assigned to clients for over the counter sales.

- If appropriate, use the **OTC Doctor** drop-down list and select an **OTC Doctor**.

 *You may want to set up a “client” account in AVImark specifically for over-the-counter sales. In fact, things will work more quickly if you set up one of these OTC clients for each month of the year. You will not need a patient added for these OTC clients, just the client area itself.*

Rabies assignment

This field allows you to specify the species you would like AVImark to automatically increment the rabies tag number for each time you add a rabies vaccination in the Medical History Area of the patient.

- Using the **Rabies assignment** drop-down list, select the correct species, or select **Always** for all species.

Rabies prompt

This field allows you to specify which species you would like AVImark to automatically prompt you to enter a tag number for when a rabies vaccination treatment is added to the Medical History of the patient.

- Using the **Rabies prompt** drop-down list, select the correct species, or select **Always** for all species.

Rabies certificates

This field allows you to specify which species you would like AVImark to automatically print a rabies certificate for when a rabies vaccination is included on the invoice.

- Using the **Rabies certificates** drop-down list, select the correct species, or select **Always** for all species.

Prompt before printing

This option allows you to have AVImark prompt you before printing Rabies Certificates. By selecting this option, you are able to change printing options, such as Print Preview, number of copies, or the printer itself. This is done from the Print Document window, which will appear when printing the invoice.

- If applicable, select **Prompt before printing**.

Start/Stop auditing at

When using the Audit Trail feature of AVImark, these fields allow you to specify the start and stop auditing times. For more information on the AVImark Audit Trail feature, refer to “*CHAPTER 20: PERIOD-TO-DATE REPORTS*”.

- If appropriate, type a **Start** and **Stop auditing at** time. For example, (Start 12:00a, Stop 11:59p).

Audit on weekends

This option allows you to continue auditing on weekends when using the AVImark Audit Trail feature.

- If appropriate, select **Audit on weekends**.

Last used on date

This field is used to indicate the date that your inventory statistics were last updated. AVImark will automatically enter the date when you select “Yes” to update your inventory statistics at the beginning of each month.

Chart memo


The Chart memo area may be used to type a default memo or text to be included at the bottom of each patient chart below the Medical History section. This memo will be in addition to the “Enter chart notes” option on the Patient Chart window.

- If applicable, type a default **Chart memo**.

Other options

From this area of the Miscellaneous folder, AVImark allows you to specify different actions, warnings and prompts to be displayed when certain functions are performed. You may select as many options that you wish. The following is a list of the available options and their meaning:

- If appropriate, select the **Other options** you wish.

	To learn more about: Other Options and their functions	Search the Help for: Miscellaneous Tab
---	--	--

Show alerts

This option allows you to tell AVImark when you want the alert messages to be displayed.

- Using the **Show alerts** drop-down list select the alerts display option.

Specify System Information

The System folder consists of a series of sub-folders and fields where you may specify information about how your computer system/network is configured.

Sub-folder, System

The screenshot shows a configuration window for the 'System' folder. It features a tabbed interface with 'System' selected. The 'AVImark version' field is set to '2010.0'. The 'Title' field is set to 'AVImark'. There are several checkboxes: 'Use Windows colors', 'Military time format', 'Use internet logging', 'Detailed error messages', 'Windows date format', and 'M/d/yyyy'. The 'Windows date format' checkbox is checked, and the date format 'M/d/yyyy' is displayed next to it.

AVImark version

AVImark automatically detects what version you are using. Do not change this version number unless instructed by an AVImark support technician.

Title

By default the title “AVImark” is placed in this field. The AVImark application name will be shown on the Windows Task Bar while AVImark is running. If you wish, you may change this title.

- If appropriate, type a **Title**.

Use Window's colors

This option allows you to use the Windows Display Properties Appearance colors that have been selected for Active and Inactive windows, Message boxes, Window text background, and so on.

- If appropriate, select **Use Window's colors**.

Military time format

With this option selected, all aspects of the software dealing with time will be converted to Military time format.

- If appropriate, select **Military time format**.

Detailed error messages

With this option selected, AVImark will display a screen whenever you receive an error message that contains specific information concerning the steps taken prior to receiving the error.

- If appropriate, select **Detailed error messages**.

Windows date format

This option allows you to have the dates that appear in AVImark and on AVImark reports follow the date format specified in the Regional settings of your Control Panel within the Short date format field.

- If appropriate, select **Windows date format**.

Directories

AVImark requires you to designate the folders in which certain files are stored. As AVImark performs its various functions, it needs to access these files and therefore needs to know the location “path” of these files. When specifying the folder path names, do NOT include the local drive letter since they do not reside on each local workstation. For example: \MY DOCUMENTS, \FORMS, \TEXT, and \PHOTOS for each of these folders. The following is a list of the different folders in which certain files are stored:

Documents

AVImark allows you to organize your documents into subdirectories of the “Documents directory”.

For example, you could now have a directory structure for your documents such as:

- Letters** - (C:\My Documents\Letters)
- Certificates** - (C:\My Documents\Certificates)
- Personal** - (C:\My Documents\Personal)
- Take-home documents** - (C:\My Documents\Take-Home documents)
- Treatments** - (C:\My Documents\Take-home documents\Treatments)
- Diagnoses** - (C:\My Documents\Take-home documents\Diagnoses)
- Forms** - (C:\My Documents\Forms)

AVImark will automatically attempt to locate documents that are attached to Treatments, Items, and Diagnoses, as well as any manually entered document name for which a directory has not been selected.

Forms

AVImark uses the Forms function of Microsoft Word®. With this feature you may attach an MS Word form document to any treatment. If you specify FORMS, this would mean your MS Word form files are stored in the “FORMS” folder on the C-Drive of your server computer.

ID

When using the AVImark Sidekick feature along with Microsoft Word® Forms, you may specify a Starting Form ID. This value is used as an auto-incrementing sequence number so as to give each form a unique name. Each Sidekick workstation should use its own unique “Starting form ID” value.

Photographs

This field allows you to specify a path to store your photographs into a single directory.

For example: \PHOTOS.

Directories

You may specify your photographs be stored either into a single directory (as is currently the case) or into sub-directories by using the drop-down list to select a sub-directory. For more information on storing patient photos, refer to “CHAPTER 7: PATIENT AREA”.

Journal files

AVImark uses the Journal feature in conjunction with the Animal Care Training’s VETED Tablet. The VETED Tablet extensively uses Microsoft® Journal files for Client Education documents and consent forms.

Text files

AVImark has the ability to import Text files into the different Notes windows throughout AVImark.

These files must be in the Text File format (*.txt). If you would like to keep your Text files separate from your other Word documents, you may specify the path to the Text files in this field.

Documents	MY DOCUMENTS	Spreadsheets	FORMS
Forms	MY FORMS	Backup to	C:\AVIMARK DEMO
Photographs	PHOTOS	in sub-directories	By client, then patier
Journal files		Quickbooks	
Text files			

Spreadsheets

Use this field to specify the destination path where AVImark will locate and store MS Excel spreadsheets. When attaching an XLS file to a Medical History entry AVImark will open to the directory specified here.

Backup to

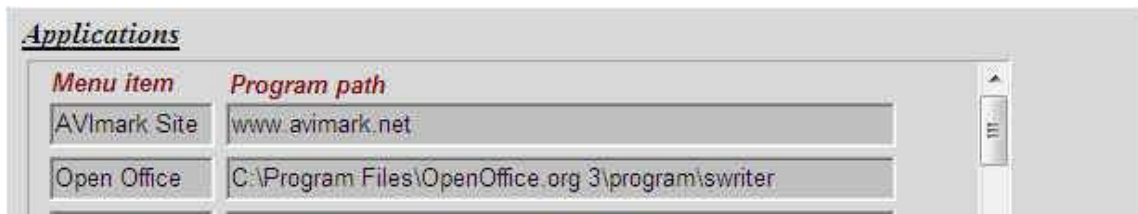
This field shows the specified destination path when backing up your data. Regardless of what computer is being used for backing up purposes AVImark will default to the destination specified in the “Backup to field”.

QuickBooks®

When using QuickBooks in conjunction with AVImark, this field is where you will specify the folder in which AVImark will place the file that is created when exporting financial information to Quick Books. For more information on exporting to QuickBooks, refer to “CHAPTER 31: EXPORTING TO QUICKBOOKS®”.

Applications

AVImark has the ability to launch other application programs directly from the Client Information Display through the Applications Menu. For example: MS Excel, MS Word, QuickBooks, a website and so on. You must specify the name and path for each of these applications, if applicable, and you may enter up to ten different applications.



- Type the **Name** of the program in the **Menu item** area. For example: (NOTEPAD).
- Type the Path of where the program resides in the Program path area. For example: (C:\WINDOWS\NOTEPAD.EXE).

Sub-folder, E-Mail

Server name

This is the name of your Internet Service Provider’s (ISP) Outgoing mail (SMTP) server. If you are not certain what this name is, you may refer to it in Microsoft® Outlook, Tools, Accounts, Mail, Properties, Servers, Outgoing mail (SMTP).

- Type the **Server name** of your ISP Outgoing mail server.

Reply E-Mail address

This field specifies the default E-Mail address for incoming mail if there is no user specific e-mail address selected. If you need to refer to it, it may be found in Microsoft® Outlook, Tools, Accounts, Mail, Properties, Servers, Ingoing mail Server, Account name.

- Type the **Reply E-Mail address** for incoming mail.

Authentication

This field is provided for those clinics whose mail provider requires authentication. There is a User ID field and an E-Mail Password within this section. The User ID and password can be obtained from your E-Mail Service Provider.

- Enter the **User ID** and **E-Mail password** provided by your E-Mail Service Provider.

Sub-folder, Modem

Modem on

For AVImark to work properly, you must specify which serial port your modem (if you have one) is connected.

- Use the **Modem on** drop-down list to select which port your modem is using.

Sub-folder, Cash Drawer

If you are or will be using a cash drawer with the AVImark program you will need to enter the specifications for the cash drawer you are using. All of the specifications can be found in the paper work the cash drawer came with. If you are having trouble finding the information you can test the communication by “pinging” the computer using a DOS command to check the communication between the computer and the cash drawer. If you need further assistance, AVImark Technical Support can walk you through this process. As a shortcut, AVImark allows you to press Ctrl+F11 from the CID to open the cash drawer.

System	E-Mail	Modem	Cash Drawer	Instrument	Documents	Laboratory	X-Charge
Cash drawer on	(none) ▾	Data Bits	8 ▾	<input type="checkbox"/>	Open On Credit		
Baud Rate	9600 ▾	Parity	None ▾	<input type="checkbox"/>	Use TCP/IP		
Cash string		Stop Bits	1 ▾				

Cash drawer on

AVImark will support most of the serial-attached cash drawers. That is, AVImark will open most computer-driven cash drawers that are attached to the computer via the system COM1 or COM2 serial ports.

- If appropriate, use the Cash drawer on drop-down list and select the correct serial port.

Baud Rate

Use the **Baud Rate** drop-down list and select the correct **Baud Rate**.

Cash string

The field is used to specify the characters that your cash drawer needs to receive to open.

- Type the cash drawer’s **Cash string** specifications.

Data Bits

Use the **Data Bits** drop-down list and select the correct **Data Bits**.

Parity

Use the **Parity** drop-down list and select the correct **Parity**.

Stop Bits

Use the **Stop Bits** drop-down list and select the correct **Stop Bits**.

Open On Credit

Use **Open On Credit** to open the cash drawer when accepting an MPS credit card payment.

Use TCP/IP

This option is used if you are using this naming code when connecting to the cash drawer.

- If appropriate, select **Use TCP/IP**.

Sub-folder, Instrument

The use of multiple lab instruments on the same computer is available through the use of this sub-folder. For more information on the different lab instruments and their settings, refer to “*CHAPTER 33: LAB*”

INSTRUMENTS

- With the correct lab instrument highlighted, select the correct settings for that instrument.
- Continue with the same procedure for each instrument you will be using.

Sub-folder, Documents

Office Suite Integration

AVImark gives you the ability to select which word processing program you will be using from each computer.

- Select either **Microsoft Word®** or **Star Office/Open Office®**.
- Use the **File name extension** drop-down list and select the correct **File name extension**. When selecting **Microsoft Word®**, select **DOC** from the drop-down list. If using **Star Office/Open Office®**, you may select any of the three file extensions.

Graphing

AVImark gives you the ability to graph and print analysis either through AVImark or Excel.

- Use the Graphing drop-down list and select either AVImark or Excel.

Sub-folder, Laboratory

Antech®

This field is used to specify the path of the folder used to store the XML files you will download from the Zoasis Corporation website. For more information on Antech®, refer to “CHAPTER 33: LAB INSTRUMENTS”.

- Type the path where the XML files will be stored. For example: (\Antech).

VetConnect®

This field is used to specify the path of the folder used to store the RTW files you will download from the VetConnect® website. Also in this area, you will specify the Username and Password as specified by IDEXX® to allow access to the VetConnect® website to permit downloading of test results. For more information on VetConnect®, refer to “CHAPTER 33: LAB INSTRUMENTS”.


- Type the path where the RTW files will be stored.
- Enter the Username and Password as received from IDEXX®.

Sub-folder, X-Charge®

It is from this folder where you are able to select the appropriate PIN Pad device you want to use and enter the setup information. When using the HHP TT3101 or TT8810, the invoice total being charged to the credit or debit card will now display on the device's screen for view by the client.

- If appropriate, click **Pin Pad Device Setup**.

Select the appropriate Pin Pad device, and enter the correct set up information.

	To learn more about: X-Charge®/Capturing Signatures	Search the Help for: X-Charge®; Signatures
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Sub-folder, Verifone

If using the Verifone® PIN Pad device specify the correct COM port it is attached to.

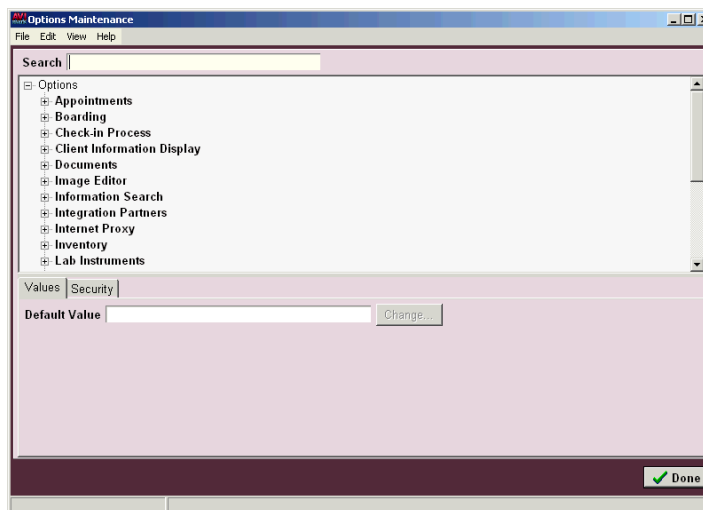
- Click on the Verifone PINpad 1000se on drop-down list to choose the appropriate COM port.

Set Advanced Hospital Options

It is from this folder that you may customize AVImark to serve the needs of your clinic and each individual user. All options fall into two basic categories: User and Site. User options affect how AVImark works for individual users. You can add multiple users for each option. For example, one user might like to see Client and Patient Alerts displayed on the CID, while other users would choose not to use this feature. AVImark will recognize who is logged in and work according to the options set for that user. Site options affect all users for each clinic or Site. For example, when a Site clinic would like to charge a different amount for a Prescription fee (other than what the home clinic is charging) they will have the ability to set their own fee accordingly.

	<i>In the Search field you can type in part or the entire description of the option you are looking for. The options matching the entry will be displayed in a "narrowed down" list.</i>
---	--

- From the **Advanced folder**, click **Advanced Options** to display the Options Maintenance window.



Set options for users

- Click the + button next to the **Option Category** name to expand the category.

- Select the **Option** you wish to set a default value for.
- To set a Value for all users, click **Change** in the **Default Value** area to display the Change Option Value window.
- In the **Value** field, set the appropriate **Default Value**.
- To set a Default Value for an individual user(s), **right-click** in the **ID/User** area to display the shortcut menu. Click **New** to display the New User Option Value window.



- Using the **User** drop-down list, select the correct **User** name.
- In the **Value** field, enter the appropriate **Value** for the selected user and click **OK**.

Set options for Site

- Click the + button next to the **Option Category** name to expand the category.
- Select the **Option** you wish to set a default value for.
- To set a Value for all Sites, click **Change** in the **Default Value** area to display the Change Option Value window.
- In the **Value** field, set the appropriate **Default Value**.
- To set a Default Value for an individual Site(s), **right-click** in the **Site** area to display the shortcut menu.
- Click **New** to display the New Site Option Value window.
- Using the **Site** drop-down list select the correct **Site**.
- In the **Value** field, enter the appropriate **Value** for the selected Site and click **OK**.

Set security in Option Maintenance

Securing an option may be accomplished from either the Option Maintenance area or Users and Security. For more information on securing functions through Users and Security, refer to “*CHAPTER 21: SECURITY ADMINISTRATION*”.

- From the Option Maintenance window, select the **Security** tab to display the security setting for the selected option.
- Use the **Category** drop-down list and select the **User Group** that will be allowed to perform the selected option.
- Click **Secure**. All User Groups having the ability to perform the selected option will be listed in the **Secured To** area.

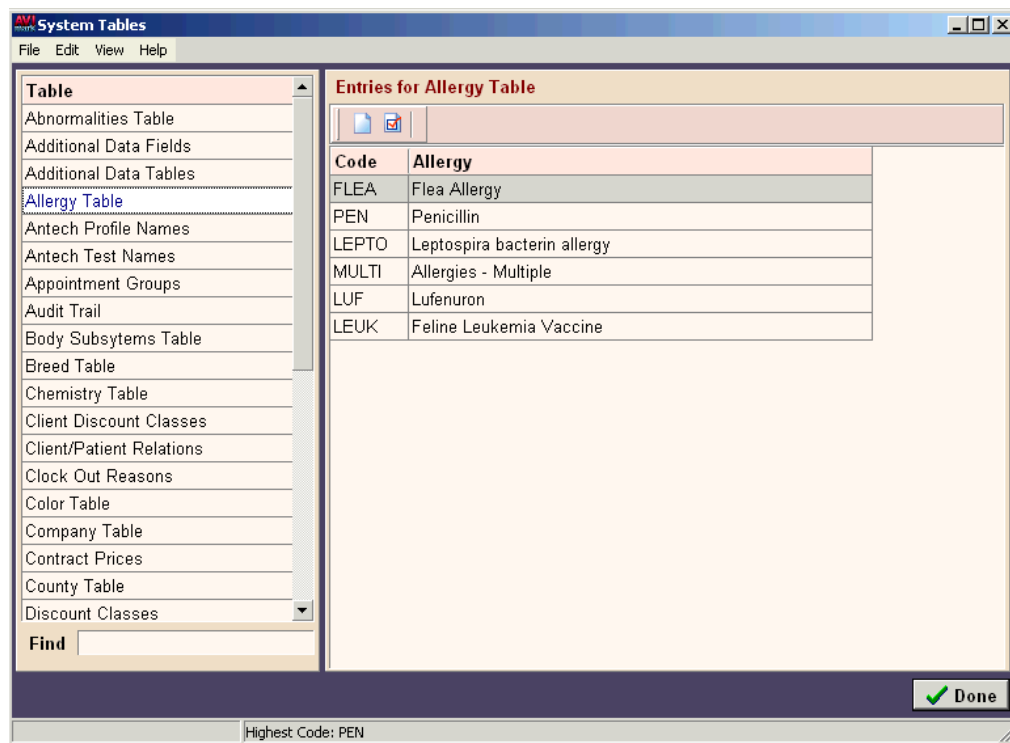
	<p>To learn more about: Advanced Options/Setup</p>	<p>Search the Help for: Advanced Tab; Advanced Options</p>
---	--	--

CHAPTER 2: SYSTEM TABLES

The System Tables area of the program consists of several different tables that contain lists of contents for use in other AVImark areas. The different system tables are listed on the left side of the AVImark System Tables Display and the contents of the table you choose appears on the right side of the display.

In this chapter you will learn about...

- » Working with System Tables on page 29
- » Abnormalities Table on page 31
- » Additional Data Fields/Tables on page 31
- » Allergy Table on page 31
- » Antech® Profile Names on page 31
- » Antech® Test Names on page 31
- » Appointment Groups on page 31
- » Appointment Type on page 31
- » Audit Trail on page 31
- » Body Subsystems Table on page 32
- » Breed and Color Tables on page 32
- » Chemistry Table on page 32
- » Client Discount Classes Table on page 32
- » Client/Patient Relations Table on page 32
- » Clock Out Reasons Table on page 32
- » Company Table on page 32
- » Contract Prices on page 32
- » County Table on page 33
- » Discount Classes Table on page 33
- » Discount Plan Table on page 33
- » Facility Table on page 33
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Working with System Tables

The AVImark System Tables function allows you to add and/or change information in whatever table you

select. When making changes to a table or table entry, it is important that you NOT change any Codes already assigned. When a change has been made to System Tables, AVImark gives you the ability to Undo and/or Redo the changes. In addition, any change that is made to a line item, AVImark creates a History of Entry record or log of the entry to include; the Date, Time, User, and the action used to make the change. Another significant feature within System Tables is the “Find” field located at the bottom of the System Tables window. This allows you to find certain entries by typing in a few letters of the Code or Description and AVImark will display only those entries in the “Entries for” area. The entries contained in the “Entries for” area may also be sorted by code, description or manually rearranged to your desired sort order.

- On the CID, open the **Work with** menu. Click **System Tables** to display the System Tables window.

Make changes to a table or table entry

There may be times when you find it necessary to make a change to the description of a table or change an entry for that table.

- From the System Tables window, select the table you wish to change.
- **Right-click** and from the shortcut menu click **Change** to display the Change Table window.
- In the **Table** field, type the new description you wish to give the table. If there are several tables you wish to change, use the **Next** and/or **Prior** buttons to move through the table list.
- Click **OK** when finished.
- To change an entry for a table, select the correct table to display the Entries for that table.
- Select the correct entry from the **Entries for** area. **Right-click** and from the shortcut menu click **Change** to display the Change Entry window.
- Enter the necessary change. If there are several entries you wish to change, use the **Next** and/or **Prior** buttons to move through the entries list.
- Click **OK** when finished.

Undo/Redo a change

- On the **Edit** menu, click either **Undo** or **Redo**.

View history of entry

- With the correct **Entry** selected, open the **View** menu. Click **Entry History** to display the Entry History window.

Add a New Table and Table Entries

Most of the tables that you will be using in AVImark will already be in place and set up for you. However, you may add your own tables and/or lists of values from which you may later choose the appropriate value(s) when entering client and/or patient data. This capability is made possible by setting up your own data fields of a specific type that will allow you to choose the appropriate information. For more information about setting up additional data fields, refer to “*CHAPTER 25: ADDITIONAL DATA FIELDS*”.

- In the **Table** area, **right-click** and from the shortcut menu click **New** to display the New Table window.
- Specify a **Code** and **Table** name for the new table and click **OK**.
- In the **Entries for** area, **right-click** and from the shortcut menu click **New** to display the New Entry window.
- Specify a **Code** and **Description** for the entry and click **OK**. You may add as many entries as you wish to the table.

Identify the Different System Tables

The following is a list and description of the AVImark System Tables that are already in place and set up for you.

Abnormalities Table

The Abnormalities Table allows you to specify your own list of physical and physiological problem areas that you will use to describe and define a patient's condition. These abnormalities are considered "Body Systems" and automatically appear in the Objective Folder of a patient's Medical Condition window. You may also create "Body Subsystems" as well. For example, the retina would be a Subsystem to the "Eyes Body System". These Body Subsystems are first created in the Body Subsystems Table. The code for this table must be "ABNORMAL".

- To link a Body Subsystem, select the correct **Body System** (Abnormality).
- **Right-click** and from the shortcut menu click **Subsystems** to display the Body Sub-systems for window.
- **Right-click** and from the shortcut menu click **New** to display the New Sub-system window.
- Enter the correct **Code** for the subsystem as specified in the Body Subsystem Table and click **Done**.

Additional Data Fields/Tables

AVImark allows you to create Additional Data Fields for Clients, Patients, Medical Condition Records, and Whiteboard. For example, you may want to record the directions to a client's home or additional contact numbers. For a complete discussion of these Additional Data Fields and Tables, refer to "*CHAPTER 25: ADDITIONAL DATA FIELDS*". The code for the Additional Data Fields table must be "DATA", and the code for the Additional Data Tables must be "TABLE".

Allergy Table

The allergy table consists of common patient allergies. The code for this table must be "ALLERGY". This allows you to select one of the pre-defined allergies into the patient area.

Antech® Profile Names

The Antech® Profile Names Table is used in conjunction with Antech® test results. There will be no user setup in this field. AVImark® will do this upon definition of fields when defining Antech® test results. When defining Data Fields with Antech®, each Antech® test or Profile will automatically insert the appropriate Antech® ID into the Antech®/Profile ID field within the Change Treatment window of the code where the Data Fields were defined. When Data Fields are defined for Profiles, the Antech® Profile ID and the Description of the Treatment will be added to the Antech® Profile Names table. The code for this table must be "ANTECHP".

Antech® Test Names

The Antech® Test Names Table allows you to input Antech® Test Names that need to be abbreviated. This is used in conjunction with importing Antech® test results. Any test name more than fifteen characters will need to be abbreviated and entered into this table. For example, Alkaline Phosphate would be entered Alkaline Phos. When entering an Antech® Test Name entry, the "Code" will be the Antech® Extension (labeled as UnitCode Ext-ID on the Antech® xml file) for this test, as defined by Antech®. The "Description" will be the abbreviated Antech® test name. The code for this table must be "ANTECH®".

Appointment Groups

The Appointment Groups table lists user groups that can be associated to specific users. This allows appointments to be displayed by user groups and not individual staff members.

Appointment Type

The Appointment Type table is used to identify appointment or block-off types by assigning colors. After creating the types you can then assign the appropriate type to the desired appointment or block-off, which will appear on the Calendar in the designated color.

Audit Trail

The Audit Trail table lists those functions that you may audit. It is the Audit Trail Report that reports the functions that were performed by those persons who are set up in the Users & Security function of AVImark. This list can not be modified. The code for this table must be "AUDIT".

Body Subsystems Table

The Body Subsystems Table allows you to enter any number of entries that are to be considered by AVImark as being members of the body systems identified in the Abnormalities Table. These body sub-systems are then associated with a particular Abnormality. The code for this table must be “SUBSYS”.

Breed and Color Tables

The breed and color tables contain lists of breed and color codes and descriptions for all species. AVImark provides an Auto Add feature. When this option is checked, you will be allowed to add new entries to the table(s) as you enter new patients into AVImark. When adding a new entry to the Breed Table, you will notice a “Type” field. By entering a single letter or number value in this field, you may group selected breed types together. This becomes extremely useful when using the AVImark Information Search feature to search for multiple breed types. The codes for these tables must be “BREEDS”, and “COLORS”.

Chemistry Table

This table is used in conjunction with lab machine use with AVImark and relates to analytes. Each analyte measured has a formal abbreviated identifier. Through this table AVImark provides a means for expanding these abbreviations into more readable names, up to 15 characters in length. These names will be displayed as the “result name” when defining fields through lab machines. This table will have existing entries for use with your lab machines. Although descriptions may be changed, it is very important to NOT change the codes. New entries may be added to this table using only codes defined by the lab machine’s manufacturer. The code for this table must be “CHEM”.

Client Discount Classes Table

The Client Discount Classes table will maintain the list of client groups appropriate for receiving discounts. When setting up the discount rates for client groups in Hospital Setup you can choose a client class from this list. The code for this table must be “CLTDISC”.

Client/Patient Relations Table

AVImark allows the user to associate patients with a client other than their owner, for example, Equines with their trainer. The first part of the setup will be done in System Tables in the Client/Patient Relations category. In the change table entry field, the Code field does not need to be specific. The Relationship field needs to be the relationship of this person or business to the patient, such as trainer, stables, and so on. The Code field needs to be the code of the client that is the trainer or the stables, and so on. The “Auto-Post” field, when selected, will cause the items or treatments that are added to the associated client to be automatically posted to the Medical History of the associated patient (the patient that is associated with this trainer, stables or others). The code for this table must be “RELATION”.

Clock Out Reasons Table

This table is a list of typical reasons your hourly employees will be clocking out of the AVImark Time Clock function. When an employee clocks out, they will need to choose from a list to indicate their reason for leaving. The code for this table must be “CLOCK”.

Company Table

The company table is a list of Company Numbers and corresponding Company Names to be used if you are operating more than one business at your location. For example, you might use this function if you want to invoice/bill/remind/report your grooming business using a different Company name. You may use any 2 digit number from 02 through 99. DO NOT use the number 01 as the Company Number. This is the AVImark default number for each client unless changed. In addition, AVImark gives you the ability to select different colors for each company. This allows for easy identification when the company is displayed on the CID. The code for this table must be “COMPANY”.

Contract Prices

This table contains a list of the contract price groups. A single character code will need to be entered and a description name. These contract price groups can be linked to individual inventory items for break pricing. The contracted price is specified on the individual item in the Inventory List.

County Table

The County Table is used for the purpose of defining rabies certificate forms that must be printed for different counties. The County Table is a list of counties within your immediate area, each with a corresponding rabies certificate document name. When creating the table entry, the Code value is the name of the county and the Description is the name of the MS Word document you would like printed as the rabies certificate for clients that reside in this county. The code for this table must be "COUNTY".

Discount Classes Table

This table will maintain the list of various Treatment and Inventory Classes appropriate for receiving discounts. When setting up the discount rates for Treatment and Item Classes in Hospital Setup you can choose a class from this list. The code for this table must be "DISCLSS".

Discount Plan Table

AVImark provides the means to put a patient on a "Health Maintenance Plan" that includes provisions for automatic discounting for specific treatments, and courtesy discounting on all others (with possible exceptions). In addition, you could also set up a reminder template to automatically remind for plan renewal at the end of the time period covered by the plan. This function allows the hospital to charge the customer *up front* for a treatment program for the patient and then automatically track the patient's progress through the plan, giving appropriate discounts along the way. Provision is made here in System Tables for any number of discount plans to be defined by the hospital. Any client may have each of their pets on a different plan. However, any given patient may only be qualified for one plan at a time. For more information on how to set up discount plans refer to "*CHAPTER 24: DISCOUNT PLANS*". The code for this table must be "PLANS".

Facility Table

This table allows you to define the rooms in which you treat patients. When you make an appointment for a patient, you may choose the facility that will be used for the appointment duration. You will be able to use a drop-down menu to assign the patient to an appropriate treatment room (facility). Then, when the appointment schedule is viewed or printed, the treatment facility will be indicated. The order in which they appear in this Table from top to bottom is the order in which they will appear on the appointment calendar from left to right. The code for this table must be "FACILITY".

Local Prefix Table

In AVImark there is a feature called Phone Dialer, which allows you to use your Analog phone system and computer to dial the selected clients phone number for you. Before using this feature you must have your local prefixes defined in the Local Prefix Table. The code for this table must be "LOCALPRE".

Payment Types Table

AVImark allows you to define up to 10 payment types. Once defined, these payment types can be entered in the same way that other payments are entered. Each entry in this table represents a new payment type. For instance, you might define a payment type called, "Friendly Bank Debit Card". In addition, you may need to associate an Action Code with each new payment type defined. These Action Codes tell AVImark the nature of the payment type. The following Action Codes may be used: **A** - This payment should be treated as a credit card payment. **C** - This payment should be treated as a cash payment, giving the appropriate cash discount if it applies. If you give cash discounts, you should use this Action Code for payment types that are similar to check payments, such as Debit cards. The code for this table must be "PAYMENTS".

QuickBooks® Accounts Table

QuickBooks®, by default, has several predefined asset accounts that AVImark exports transaction totals to. For AVImark to know what these accounts are, AVImark maintains this System Table which has several predefined entries. You may change the Description values for the entries in this table, but NOT the codes. For more information on how to set up AVImark to export to QuickBooks®, refer to "*CHAPTER 31: EXPORTING TO QUICKBOOKS®*". The code for this table must be "QBOOKS".

Referral Selections Table

AVImark lets you define your own referrals, other than clients, to be added to client files. Any referral you would like to be displayed in the selection list, simply add them to this table. This allows you to choose

referrals, other than clients from a drop-down menu to prevent misspellings and duplications. You may also prevent users from typing their own referrals for clients by checking the “Must Choose referrals” option in Hospital Setup. The code for this table must be “REFER”.

Route Table

This table is associated with the Whiteboard Schedule tab where you can choose how a scheduled treatment/item is to be administered or performed. This table is used to define the different types. The code for this table must be “ROUTE”.

Special Fees Table

AVImark allows you to define your own list of “add-on” fees that can be added to the retail price of specific inventory items of your choice. When you would like a certain item to have this fee “structure”, open the “Change Item” window for the particular item and enter the Fee Code as defined in the Special Fees Table. The code for this table must be “FEES”.

Species Table

This table allows you to specify the different species cared for within your hospital. In addition, when entering species for this table, AVImark has a unique way of letting you charge for treatments based on the weight of the patient. This function is called “Weight-based Pricing” and by using it you should eliminate the need to have duplicate treatments with different prices for different patient weight ranges. If you wish to use this function, you will need to enter values in the Weight and Increment fields of the Table Entry window. Using this function, AVImark will add to the price of any treatment a user-defined percentage of that price. This is based on how much the current weight of the patient is, different from the “base” species weight as defined here in the Species Table. This user-defined percentage is called the Weight Surcharge and may be specified for any treatment. Within the report card field indicate the default report card to be printed from the Medical Condition Window for the selected species.

If you intend to use the Medical Condition Record portion of AVImark you have the ability to print a Report Card document which can be species specific. Enter the document name you would like to use when printing a report card for the selected species. The code for this table must be “SPECIES”.

Tax Table

AVImark lets you assign one or more state and local tax rates for each zip code so that, for a given client, transactions would be taxed accordingly. This will help when your business is located where more than one set of tax rates may apply, depending upon which client is doing business. If you sell taxable items to a client whose Zip Code is either not in the Zip Code Table or does not have a Tax Area linked to it, the client will be charged whatever tax rates you have assigned in Hospital Setup. The code for this table must be “TAX”.

Units of Measure Table

This table allows you to specify the units of measure that you use when dispensing inventory items. These values will be displayed from a drop-down list wherever a unit of measure is indicated. The code for this table must be “MEASURE”.

Vaccine Table

This table is used to maintain the information that is printed on the vaccination certificates you provide to your clients whenever a rabies vaccination (or other vaccine) is given to a patient. In this table you should specify the rabies and any other vaccine currently in use. If you are currently using more than one, AVImark will prompt you for the correct one at the time you are entering the vaccination treatment. The code for this table must be “VACCINE”.

Variance Reasons Table

This table is used to track controlled substance quantities. You are able to specify reasons why you may have used more of the substance than what was actually administered to the patient, such as spilling, breaking, or leaking. You will notice some example reasons listed in this table, but these may be removed or simply added to. The variance information can then be tracked in the Enter Medical History window Variance field. By adding this variance code along with the discarded amount, a Variance Report may be printed in the Inventory List.

VetConnect® Test Names Table

The VetConnect® Test Names Table is used in conjunction with VetConnect® test results. There will be no user setup in this field. AVImark will do this upon definition of fields when defining VetConnect® test results. When defining Data Fields with VetConnect®, each VetConnect® test or Profile will automatically insert the appropriate VetConnect® ID into the VetConnect® Test ID field within the Change Treatment window of the treatment which Data Fields were defined. When Data Fields are defined for Profiles, the VetConnect® Profile ID and the Description of the Treatment the data fields are being defined for will be added to the VetConnect® Test Names Table. The code for this table must be “VETCONN”.

Whiteboard Categories Table

This table is used to define categories that can be assigned to treatments, items and diagnosis, which will allow you to group and organize activities on the “Whiteboard”. Treatments, items or diagnoses can have the same assigned Whiteboard Category. The code for this table must be “WBOARD”.

Work Lists Table

AVImark lets you define a table of activities that you perform at your hospital. For example; update medical records, feeding, take blood sample, record vital signs, and so on. You may assign any patient to have any number of activities performed. At any time, you may choose to view or print a list of activities a given patient should have performed before check-out. When setting up your Work List Table, you may assign only one Work List Code to each Work List entry, although more than one job can have the same Work List Code. Furthermore, AVImark lets you assign one or more Work List Codes to any service so that, when you perform the service, the patient is automatically put on one or more Work Lists. The code for this table must be “LISTS”.

Zip Code Table

As new clients with unknown zip codes are added, AVImark will automatically add the new zip codes to your Zip Code table. If, when you added the new client, you entered the city, state and area code information for the new client, AVImark will add these values to the new zip code entry in the Zip Code table. You may also define what county each zip code refers to, by doing this you will be able to use the County Table for those instances where a certain county in your area requires a specific Rabies Certificate form. In addition, you are able to specify a “Tax Area” that determines state and local tax rates that will be charged to customers living in this Zip Code. If all of your clients pay the same tax rates, you may ignore this feature. If an invoice includes taxable items or services for a client whose Zip Code is either not in the Zip Code Table or does not have a Tax Area linked to it, the client will instead be charged whatever tax rates you have assigned in Hospital Setup. The Zip Code field is for clinics in the state of Kansas, Georgia, Ohio and Washington.

CHAPTER 3: TREATMENT LIST

The Treatment List contains all of your services that you perform for your patients. In setting up your Treatment list you will need to create Treatment categories, assign charges, create doctor's instructions, and so on. The AVImark Treatment List window identifies Treatment categories, treatments within each category and a Selected Treatment section.

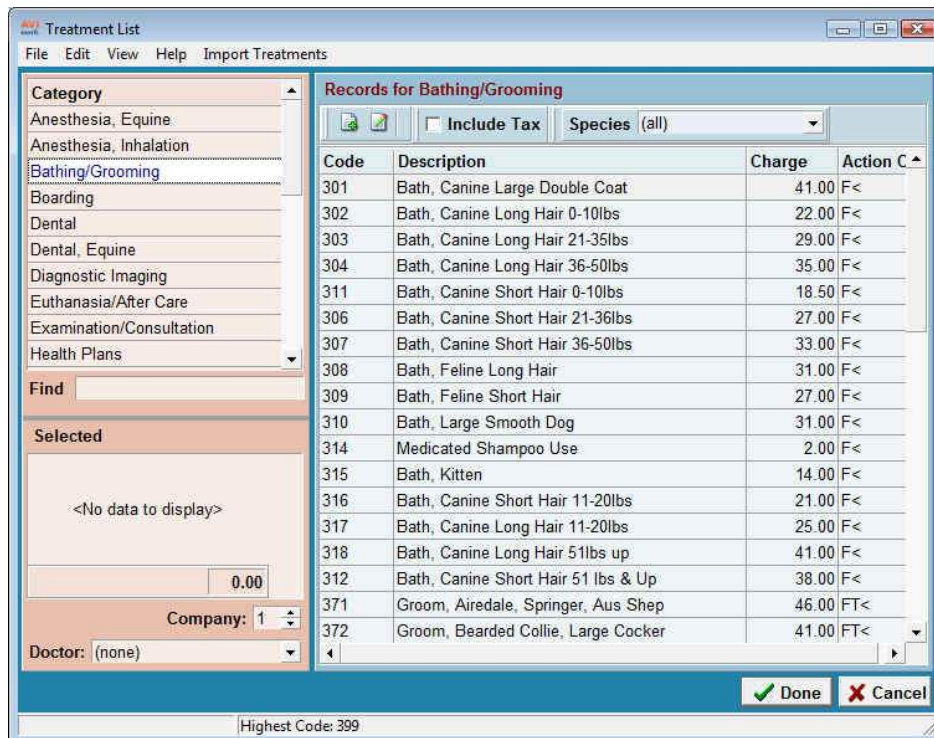
In this chapter you will learn about...

- » Setting up Treatment Categories on page 37
- » Adding a Treatment Category on page 38
- » Undeleting Treatments on page 39
- » Marking up Treatment Prices on page 39
- » The Mark up Analysis window on page 41
- » Adding a Treatment on page 42
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- » Treatment Right-Click Menu on page 56
- » View and print the Whogot list on page 58
- » Undelete a deleted treatment on page 59
- » Print the Treatment List on page 59
- » Sort the Treatment List report on page 60
- » Print a Travel Sheet on page 60

Setting up Treatment Categories

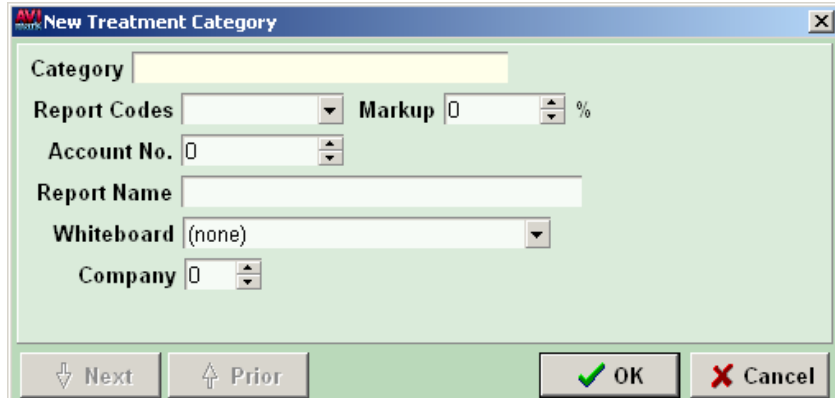
When you start using AVImark you will probably want to add, remove, and/or change each Treatment Category to customize its different characteristics to suit your clinic.

- To work with the Treatment List, open the **Work with** menu and click **Treatments**.



Adding a Treatment Category

- Point in the Treatment Categories list window. **Right-click** and from the shortcut menu click **New** to display the Change Treatment window.
- Enter the appropriate information into each field and click **Done** to add or change the category.



Category

This is the descriptive name given to each category to identify it in most AVImark functions.

- Type the name you wish to give the new category.



If you would like your categories to be in numerical order, change each category name by typing a number in front of a category name. For example: 01Dentistry, 02Large Animal Surgery.



To learn more about:
Hospital Demographics

Search the Help for:
Hospital Demographics; Demographics

Report Codes

Report codes are user-defined letter characters used for grouping performed treatments together on certain reports (Treatment Control Log, Patients by Treatments, Income by Treatment, Transaction Summary, and Sales Summary). You can have up to 7 codes for each category. Some codes are pre-programmed for the more common reports. They are:

- Lab services (L)
 - Surgery (S)
 - Injections (I)
 - Prescriptions (P)
 - Vaccinations (V)
- If appropriate, choose or type a Report code for the new category.

Markup Percentage

The Markup percentage is the default percentage used to mark up the prices of the treatments in this category.

- If appropriate, type or choose the Markup Percentage (as a decimal value or whole number) for this category. You can always type a different Markup percentage at the time you initiate the actual mark up process.

Account number

To interface with QuickBooks®, you will need to enter the income account number that you set up in QuickBooks® as the account in which to record the income generated from treatments within this category. If specified, this account number is used as the account name for QuickBooks® instead of the Treatment Category name.

- If appropriate, type the income account number that you have set up in QuickBooks®.

Report name

The Category Report name must be given for use in the End-of-Period reports. This name can be different or the same as what was typed in the Name field.

- Type a Category Report name.

Whiteboard

This field represents the Whiteboard categories that are set up in “System Tables”. They are used to group and organize treatments on the ‘Whiteboard’.

- Use the **Whiteboard** drop-down list and select the Whiteboard category you wish to assign to this category.


Company

Having the ability to assign company numbers to individual codes as well as entire categories allows detailed reporting by company to be much more accurate. This same number can be assigned to multiple items.

- If appropriate enter the desired company number for reporting purposes.

Removing a Treatment Category

- Select the Treatment Category you wish to remove. **Right-click** and from the shortcut menu click **Remove**.
- You will need to click **Yes** to confirm.

	<i>Removing a Treatment category also removes all treatments within that category.</i>
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	To learn more about: Using Report codes	Search the Help for: Report codes
---	---	---

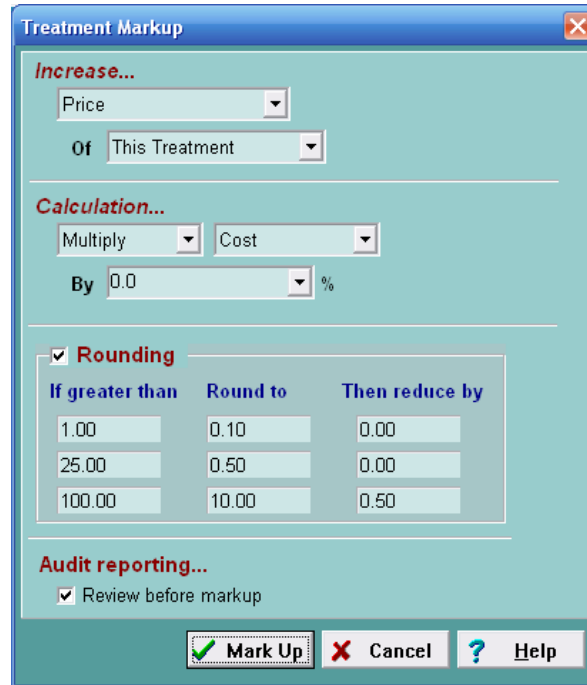
Undeleting Treatments

AVImark gives you the ability to undelete Treatment Categories or individual treatments from within the category.

- Point in the Treatment Categories window. **Right-click** and from the shortcut menu click **Undelete** to display the Undelete Treatment Categories window.
- Use the **SPACEBAR** or **right-click** and from the shortcut menu click **Select** on the categories and/or individual treatments you wish to undelete.

Marking up Treatment Prices

The Markup Percentage is set up on each Treatment category. This is the default percentage that AVImark will use to mark up the treatment prices (unless otherwise directed). AVImark lets you mark up your treatment prices in three ways; by category; all categories, or by individual treatments.



Marking up treatments in one or all categories

- Select the Treatment category you wish to mark up.
- **Right-click** and from the shortcut menu click **Markup** to display the Mark up Treatment Prices window.
- Use the **Mark up** drop-down list and select either **This category** or **All categories**.
- Use the **By** drop-down list and select by **Category** to mark up prices by the default percentage specified for your categories, or type a percentage you wish to mark up this category by (use whole numbers).

Marking up individual treatments

- From the Treatment List for window, select the treatment you wish to mark up.
- **Right-click** and from the shortcut menu click **Markup** to display the Treatment Mark up window.
- Under **Increase** select to increase **Price of This Treatment**.
- Use the **By** drop-down list and select by **Category** to mark up prices by the default percentage specified for your categories, or type a percentage you wish to mark up this category by (use whole numbers).

Rounding prices

You may round off marked up prices larger than a certain amount to the nearest increment. Furthermore, you may then subtract a specified amount from the result of the mark up to arrive at the final price.

For example: *Lets say you would like to mark up all prices in the selected category by 5% and at the same time round off all prices over \$10.00 to the nearest 10 cents, all prices over \$25.00 to the nearest \$1.00 minus 5 cents, and finally all prices over \$100.00 to the nearest \$10.00, minus 5 cents.* See Figure 3, “Mark up Treatment Prices Window”.

- In this example, the first thing you would do is enter 5 in the **By %** field.
- In the Rounding Prices dialogue box, click on the top line in the “*If greater than*” column. Specify

10.00 in this field and 0.10 in the “Round to” column.

- Next, on the middle row, specify 25.00 in the left column, 1.00 in the center column and 0.05 in the right column.
- Finally, on the third row, specify 100.00 in the left column, 10.00 in the center column and 0.05 in the right column.
- To review the proposed mark up results before finalizing the mark up process, ensure the **Review before mark up** box is checked and click **Continue**.
- By using the appropriate rounding Advanced Options in Hospital Setup you can have AVImark default to specific rounding options when the Mark Up window is opened.

The Mark up Analysis window

In the Mark up Analysis window you can review the proposed mark up results before actually marking up your prices. Once you click **Continue** from this window, AVImark will mark up prices as directed.

Category	Code	Description	Price	Actual Markup	Markup Per	New Price
Examinations	2411	Cardiac - Fax	41.00	0	25	51.50
Examinations	2410	Cardiology - Phone/Fax	60.00	0	25	75.00
Examinations	2390	Emergency, Fee A	25.00	0	25	31.50
Examinations	2391	Emergency, Fee B	30.00	0	25	37.50
Examinations	2392	Emergency, Fee C	35.00	0	25	44.00
Examinations	2360	Examination	24.00	0	25	30.00
Examinations	2170	Examination - 2nd Opinion	32.00	0	25	40.00
Examinations	2172	Examination 2nd Opinion - 2r	20.00	0	25	25.00
Examinations	2450	Examination w/Vaccinations	0.00	0	25	0.00
Examinations	2361	Examination, 2nd Animal	16.00	0	25	20.00
Examinations	2380	Examination, Comprehensive	32.00	0	25	40.00
Examinations	2381	Examination, Comprehensive	20.00	0	25	25.00
Examinations	2480	Health Certificate	6.00	0	25	7.50
Examinations	2412	Preoperative ECG - Fax Cons	25.00	0	25	31.50
Examinations	2440	Recheck	16.00	0	25	20.00
Examinations	OVG	Office Visit- Geriatric	20.00	0	25	25.00
Examinations	OVA	Office Visit- Annual	35.00	0	25	44.00
Examinations	OVN	Office Visit- New Client	20.00	0	25	25.00

Additional columns can be displayed in the Markup Analysis window by setting the appropriate default Hospital Setup Advanced Option.

- From the CID select **Wrench** speed bar icon.
- In the **search** field type **sales** and select the option **Show Sales Data By Default** and set the value to **True**.

The Markup Analysis window will now display the Fiscal Income Fiscal Sold, Projected Income, Income Difference and Income Difference Percent. The sales data amounts will be figured at the bottom of the analysis window.

- In the Markup Analysis window select **View, Show Sales Data** from the menu area to hide or display

the 5 additional income columns.


In the Markup Analysis window you can customize the view by arranging columns and using the Show/Hide Group Panel options from the View menu.

Saving and Printing Markup Values

In the Analysis window you will have the ability to save the markup values to a .dat file and also open previously saved files.

Description	Price	Act	Mark	New Pric	Fiscal Inco	Fiscal Sold	Projected I	Income Dif	Income Dif
Cardiac - Fax	41.00	0	25	51.50	0.00	0.00	0.00	0.00	0.00
Cardiology - Phone/Fax	60.00	0	25	75.00	114.00	2.00	142.50	28.50	25.00
Emergency, Fee A	25.00	0	25	31.50	25.00	1.00	31.50	6.50	26.00
Emergency, Fee B	30.00	0	25	37.50	0.00	0.00	0.00	0.00	0.00
Emergency, Fee C	35.00	0	25	44.00	0.00	0.00	0.00	0.00	0.00
Examination	24.00	0	25	30.00	240.00	10.00	300.00	60.00	25.00
Examination - 2nd Opinion	32.00	0	25	40.00	0.00	0.00	0.00	0.00	0.00
Examination 2nd Opinion - 2r	20.00	0	25	25.00	0.00	0.00	0.00	0.00	0.00
Examination w/Vaccinations	0.00	0	25	0.00	0.00	0.00	0.00	0.00	0.00
Examination, 2nd Animal	16.00	0	25	20.00	14.40	1.00	18.00	3.60	25.00
Examination, Comprehensive	32.00	0	25	40.00	28.80	1.00	36.00	7.20	25.00
Examination, Comprehensive	20.00	0	25	25.00	0.00	0.00	0.00	0.00	0.00
Health Certificate	6.00	0	25	7.50	5.40	1.00	6.75	1.35	25.00
Preoperative ECG - Fax Cons	25.00	0	25	31.50	0.00	0.00	0.00	0.00	0.00
Recheck	16.00	0	25	20.00	0.00	0.00	0.00	0.00	0.00
Office Visit- Geriatric	20.00	0	25	25.00	0.00	0.00	0.00	0.00	0.00
Office Visit- Annual	35.00	0	25	44.00	60.00	3.00	75.43	15.43	25.72
Office Visit- New Client	20.00	0	25	25.00	0.00	1.00	0.00	0.00	0.00
					487.60	20.00	610.18	122.58	176.72

- In the Markup Analysis window select **File, Open** from the menu to open a previously saved .dat file that contains markup pricing information.
- To save markup values currently displayed in the Analysis window select **File, Save As** from the menu area. Enter a file name, location and click Save.
- To print the markup analysis values select **File, Print** from the menu.

	To learn more about: Marking up Prices	Search the Help for: Marking Up
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Adding a Treatment

The right half of the Treatment List Window displays the Treatment List for the category currently selected. Working in this window, you are able to add new treatments and/or specify information about each of the existing services you perform.

- Select the correct Treatment Category to add the treatment to.
- **Point** in the Treatment List Records for section. **Right-click** and from the shortcut menu click **New** to display the New Treatment window.

Treatment Tab Values



Find

Use the Find menu button to quickly locate a field.

- Click the **Find** button.
- From the drop-down list select the field you are searching for and click **OK**. AVImark will then place the cursor in the selected field.

Code

You may use up to 8 characters, either numbers, letters, (or a combination of both) for a treatment or Treatment Group. AVImark will not allow you to use the same Treatment Code for an inventory item, diagnoses or another treatment that has already been entered.

- Type a code for the treatment.

Description

This is the description that will appear on all Period reports and in the Medical History of those patients receiving the treatment.

- Type the description you wish to assign the treatment.

Charge

Type the amount you wish to charge the client for this treatment.

Action Codes

Action Codes cause AVImark to perform certain functions including various add-on fees, patient sex codes, patient conditions, taxing, drug labels, and so on.

- If applicable, use the **Action Codes** drop-down list and select the appropriate Action codes.

The following table lists each Action Code and its meaning:

CODE	NAME	EXPLANATION
A	Automatic drug label prompt	Prompts the drug label window to display when the service is entered into medical history.
B	Automatic test result prompt	Prompts the additional data field window allowing you to enter the patient's test results.
C	Controlled Substance	Marks this service as a controlled drug and includes it on the controlled substance report.
D	Treatment causes death	Automatically marks the patient as deceased when the service is entered into medical history.
E	Print one document/patient	Prompts a document for each patient that has received the same service in medical history for a client.
F	Include on travel sheet	Includes this service on the travel sheet that can be printed through AVImark.
G	Treatment Group	Makes this service a parent treatment group allowing you to link components to this code.
H	Handling fee	Includes the handling fee with the price of the service.
I	Integer pricing	Rounds the price of a service that has a partial quantity to the price of the nearest whole number.
K	Prompt to include in group	When included within a treatment group this action code will prompt you if you would like to enter the service in medical history.
L	Subject to local sales tax	Includes the local/PST tax to the price of this service as defined in hospital setup.
M	Intramuscular injection fee	Includes the intramuscular fee to the price of this service as defined in hospital setup.
N	Don't print on patient chart	Suppresses the printing this service on the patient's printed chart.
P	Prescription fee	Includes the prescription fee to the price of this service as defined in hospital setup.
Q	Don't post to invoice	Will not include this service on the printed invoice. This service will be entered in medical history and displayed as already posted.
R	Rabies vaccination	Indicates this service as a rabies vaccination. This action code will also prompt for the vaccine information window.
S	Subject to state sales tax	Includes the state/GST tax to the price of this service as defined in hospital setup.
T	Subject to state and local sales tax	Includes both state & local/PST & GST tax to the price of this service as defined in hospital setup.
U	Intravenous injection fee	Includes the intravenous fee to the price of this service as defined in hospital setup.
V	Vaccination	Indicates that this service is a vaccination, this will also include these services on the vaccs tab at the bottom of the CID screen.
W	Auto prompt for vital signs	Automatically prompts for the Medical Condition Record (SOAP) to display when this service is entered into medical history.
X	Causes sex alteration	Automatically updates the patient's sex to spayed, neutered or gelded depending on the previous sex and species of the patient.
Y	Assign certificate number	Automatically assigns a certificate number when this service is entered into the patient's medical history.

Z	Dietary item	Includes this service on the dietary tab at the bottom of the CID screen.
+	Surcharge by item cost	Includes the cost of the linked item to the price of the parent service.
&	Surcharge by item price	Includes the price of the linked item to the price of the parent service.
)	Integer qty surcharge	If a partial amount is used of a linked inventory item AVImark will round the quantity to the price of a whole amount and add it to the price of the service it is linked to.
\$	Include price on chart	This action code will include the price of the service on the printed patient chart.
-	Obsolete treatment	Marks a service as obsolete and grays it out on the list. When trying to add this service to medical history you will be warned that it is an obsolete service.
@	Auto prompt for document	Prompts to print the linked document. Without this action code AVImark will automatically print the linked document with the invoice.
#	Don't print form/document	Suppresses the printing of the linked form or document.
*	Auto prompt for notes	When entered into medical history it will automatically prompt for a notes window to enter information about the service.
?	Schedule follow-up at posting	This action code will display the follow-up window when posting instead of when the service is entered into medical history.
!	Show warning if quantity is equal to 1	This action code will display a warning if the service entered in medical history has a quantity equal to one.
>	Don't print notes on chart	Will not include the entered medical history notes on the printed patient chart.
(Control refills	Allows you to control refills on this service if a drug label is being printed.
=	Don't use additional fees	Does not allow the additional fees (intra-muscular, intravenous, prescription, etc) to be added to the price of the service.
%	Auto copy notes into medical history	Copies entered notes on the treatment automatically into a notes window in medical history.
~	Auto hide notes in medical history	Will not display the entered medical history notes on the CID screen.
[Auto prompt for the microchip number	Automatically prompts for the patient's microchip number and will enter the number into the patient's area of the CID screen.
{	Auto prompt for the locator number	This action code will prompt for a number to be used with ePetRecords.
}	Don't add to Whiteboard	Will not include this service on the whiteboard automatically when entered into medical history.
1	Don't post from Whiteboard	When posting services from the whiteboard this action code will not post the service to medical history.
<	Include on the E-Travel sheet	Includes this service on the electronic travel sheet.

2	Show Notes in Medical History	This action codes allows you to view specific notes with the option selected of “Show all with note action” in medical history.
3	Pet ID Card Treatment	Prompts a Pet ID card, if accepted the prompts and exports the information to a file. If you would like to utilize this action code please contact the Pet ID department at 877-677-7384, option 6.
5	Dental Assessment	Automatically prompts the dental chart to display when the service is entered into medical history.

Report Codes

Report codes are user-defined letter characters used for grouping performed treatments together on certain reports (Treatment Control Log, Patients by Treatment, Income by Treatment, Transaction Summary, and Sales Summary). You may use up to 3 codes for each treatment. There are some codes that are pre-programmed for use with the most common reports. They are:

- Lab services (L)
- Surgery (S)
- Injections (I)
- Prescriptions (P)
- Vaccinations (V)

List Codes

Any given treatment may be assigned up to 3 Work List codes. When you perform the treatment, the patient is automatically put on one or more Work Lists. These codes are defined in the Work Lists Table of System Tables. For more information on Work Lists codes, refer to “CHAPTER 2: SYSTEM TABLES”.

- If appropriate, use the **List Codes** drop-down list and select the appropriate Work Lists code(s).
- Cost

The Cost of the treatment will be included on the Income by Treatment Report, Sales and Transaction Summary and the Transaction Journal. The Cost cannot be marked up and will not be included on any graphs.

- Type the cost for this treatment.

Markup Percent

A markup percentage can be added directly to the treatment that AVImark will use when a Markup is performed. This percentage will take precedence over the category markup percentage.

- Type the markup percentage for this treatment.

Appointment Time

The Appointment Time field is used to allot the number of minutes on the AVImark Appointment Calendar for an appointment for this treatment.

- If appropriate, use the UP and DOWN ARROWS and select the number of minutes you wish to allot for this treatment.

Sex(es)

You may restrict certain treatments to patients of a certain sex.

- If appropriate, use the **Sex(es)** drop-down list and select the appropriate Sex code(s).

Discount Class

AVImark uses the Discount Class field to determine which treatments are to be discounted to which client class. You may set up an unlimited number of client classes as well as treatment and inventory classes.

- If applicable, use the **Discount Class** drop-down list and select the appropriate discount class.

Species 1 & Species 2

You may specify up to 2 different species for the treatment. If you attempt to enter the treatment into Medical History of a patient whose species is other than what is selected here, the treatment will NOT be entered and you will receive a warning message.

- If appropriate, use the **Species** drop-down list and select the appropriate species limitation for the treatment.



The Species limitation fields DO NOT apply for Treatment Groups.

Abbreviation

The **Abbreviation** field allows a shortened description of the treatment to be displayed when this Treatment is included on the Whiteboard. This field will hold up to fifteen characters. This description will only be used to display within the Whiteboard. When posted to the Medical History from the Whiteboard, the normal description will be used.

- If appropriate, type a shortened description of the treatment.

Photo

AVImark lets you link any .bmp; .jpeg; or .tif image to the treatment to be printed on the client invoice attached to the doctor's instructions for the treatment. When this treatment is included on the client invoice, this photo will be printed at the bottom half of the invoice along with take-home instructions. However, if there are no take-home instructions linked with the treatment the photo will not be printed on the invoice.

- If appropriate, use the **Photo** field browse button  to open the folder of your saved photo files.

Invoice

AVImark allows you to specify an alternate name of the treatment that will be printed on the client invoice, estimate, and/or statement.

- If necessary, type an alternate Name for the treatment.

Form

AVImark allows you to designate a default Microsoft Word form that is to be used for the treatment.

- If appropriate, use the **Form** field browse button  to open the folder of your MS Word forms.


Doctor

AVImark allows you to specify a default doctor that will automatically be selected when you enter the treatment in the Medical History area of the patient.

- If appropriate, use the drop-down list and select the default doctor for the treatment.

Journal

AVImark allows you to specify a default MS Journal file to be used for the treatment.

- If appropriate, use the **Journal** field browse button  to open the folder of your MS Journal files.

Category

This field allows you to move treatments from one category to another.

- If appropriate, use the drop-down list and select the correct category.

Comments

AVImark allows you to enter Comments about the nature of the treatment and/or procedures involved in


performing it. In addition, you may select to have the Comments printed on the client invoice.


- If necessary, type the appropriate comments in the area provided.
- If you wish to have the comments printed on the client invoice, select **Print comments on invoice**.

Doctor's notes

AVImark allows you to enter Doctor's notes about the nature of this treatment and/or the procedures involved in performing it. By using the **Percent (%)** Action Code on the treatment, you can have the notes posted to the patient's Medical History. These notes will not appear on the client invoice.

- If necessary, type the appropriate Doctor's notes in the area provided.

	To learn more about:	Search the Help for:
	Typing notes or comments	Comments (select Treatments Tab); Doctors Notes
	Using merge words in your documents	Merge words
	Using the Note Glossary	Note Glossary



If you are adding a new treatment, you must click Done before you can continue setting up Attachments and other Treatment values.

Working with Attachments

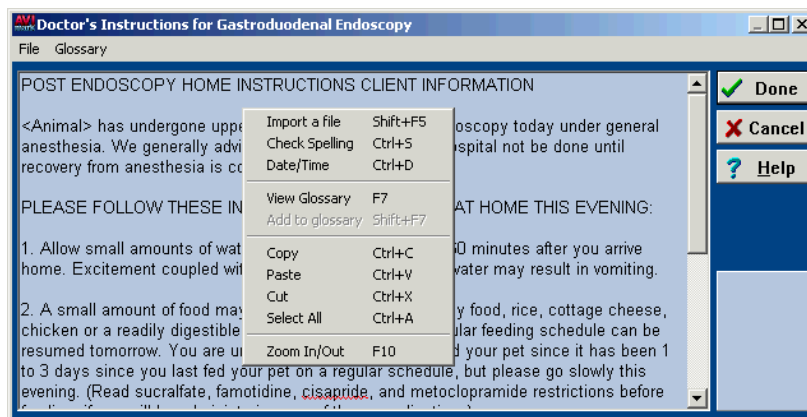
If working with a new treatment you must click **Done** before working with the Attachments area. There are three major treatment Attachments – Doctor's Instructions, Associated Treatments and Items, and More Stuff. These attachments will be added from the Change Treatment window.

- From your Treatment List, select the correct treatment.
- **Right-click** and from the shortcut menu click **Change** to display the Change Treatment window.


Attachments: Add Doctor's Instructions

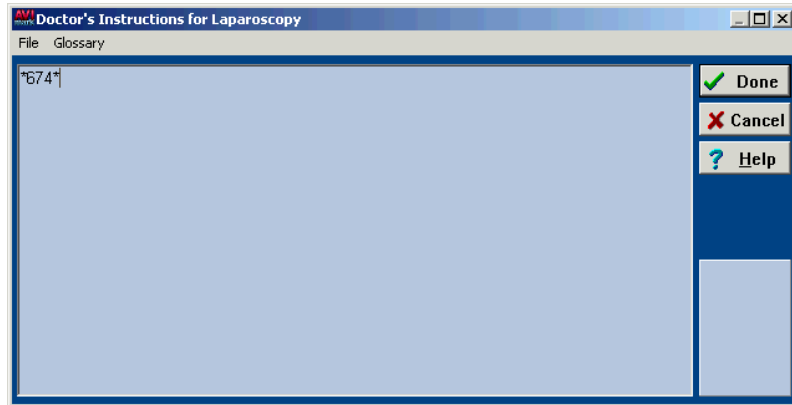
Take-home instructions can be attached to any treatment and printed automatically on the client invoice. When creating Doctor's Instruction, you may use any AVImark note feature options. For detailed information on the AVImark note feature options, refer to "CHAPTER 30: NOTE GLOSSARY AND Q & A".


- In the **Attachments** area of the Change Treatment window, click **Doctor's Instructions** to display the Doctor's Instructions Note window.



- Type the appropriate take-home Doctor's Instructions and click **Done**.
- These instructions can be viewed or modified from the Medical History area. Once the service has been entered select **right-click Instructions**.

 *If you have several treatments with similar Doctor's Instructions, you may "duplicate" the instructions without having to retype them. Instead of typing the instructions, type the Treatment Code of the "parent" treatment enclosed in asterisk (*220*). When using tag-a-long instructions, ensure the first asterisk is at the left margin with no spaces.*



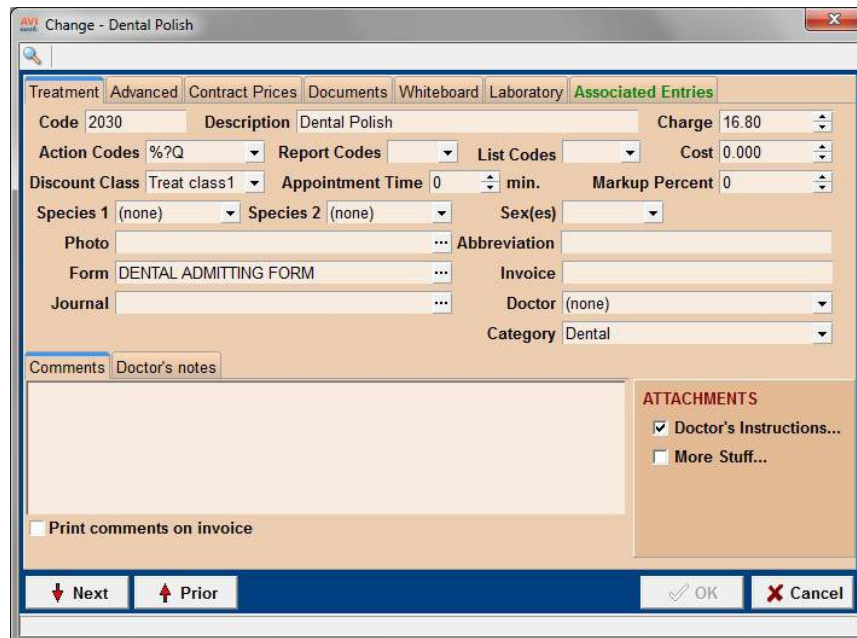
 **To learn more about:** Tag-a-long instructions

Search the Help for: Tag a longs; Notes Window


Treatment/Item Association Tab

AVImark allows you to link or "associate" other treatments, inventory items, and/or diagnosis codes to any treatment. With this feature you may enter multiple treatments into the patient's Medical History by setting up either a Treatment Group or Linked Treatments. You may also control inventory usage for any service by setting up Inventory Usage.

To access Associated Treatment\Item window from the Treatment List, highlight a code then **right-click** Change or double left-click on the code to open the Change Item window, and then click on the Associated Entries tab. Column Customization can be setup by using **right-click** View, Columns. This window also allows treatments and items to be sorted by using drag and drop. You can easily re-arrange the order of the codes the way you want them to be listed in Medical History then on to the client Invoice.



Treatment List

- Linked Treatment and Inventory Used codes can be selected in the Associated Treatment\Item window by using the Icon in the top left corner  or by using the **right-click**, New or Choose options.
- If the treatment has linked treatments or items the appropriate association options will be displayed.

NOTE: The Treatment List, Inventory List, Diagnosis List, Problem List, and Advanced Options, tabs will change to the color green when information is within that specific tab. This makes it easy to tell, at a glance, if information has been entered for that area.

Link Associated Inventory and Specify Usage

You may link any inventory with your treatments to relieve on-hand quantities whenever the treatment is entered into the Medical History of the patient. After the treatment has been entered into the patient's Medical History and later posted to the client's invoice, AVImark will update inventory on-hand quantities appropriately.

- On the Associated Entries tab **right-click** to **Choose** and click **Items** to display the Inventory list window.
- From the Inventory list, select the appropriate items by clicking on the item itself. This will place the item in the Selected Items area.
- If necessary, you may change the quantity usage of each item by clicking on the item additional times or by changing the quantity in the Selected Items area.
- Click **Done** Associated Entries tab.

Allow override

AVImark gives you the ability to change the default inventory usage each time the treatment is performed. When you enter the treatment into the Medical History of a patient, AVImark will open the Inventory Used window on the CID and let you change the default quantities or items you previously assigned to the treatment.

- On the Associated Entries tab, select **Allow override** and click **Done**.



You may also override the inventory usage from the CID after the treatment is entered into the patient's Medical History by selecting the "Inventory Used" box from the "Attachments list" in the Medical History area. You may update the usage either before or after the treatment has been posted. However, if the adjustment is done AFTER the treatment is posted, inventory on-hand quantities will not be relieved automatically. You will have to make the adjustment manually. This may be useful if controlled substance levels need to be adjusted after the treatment was entered and posted.

Treatment Pick List Window

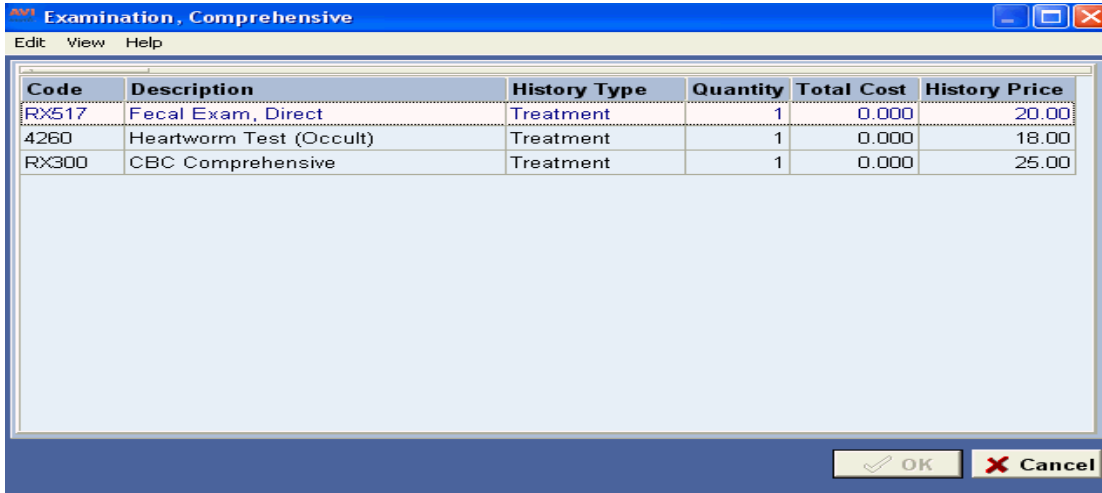
A Pick List window has been created in AVImark and is designed to list entries linked to the parent treatment being added to Medical History. From this window the user can pick which linked entries are to be posted.

Auto-Prompting for Pick List

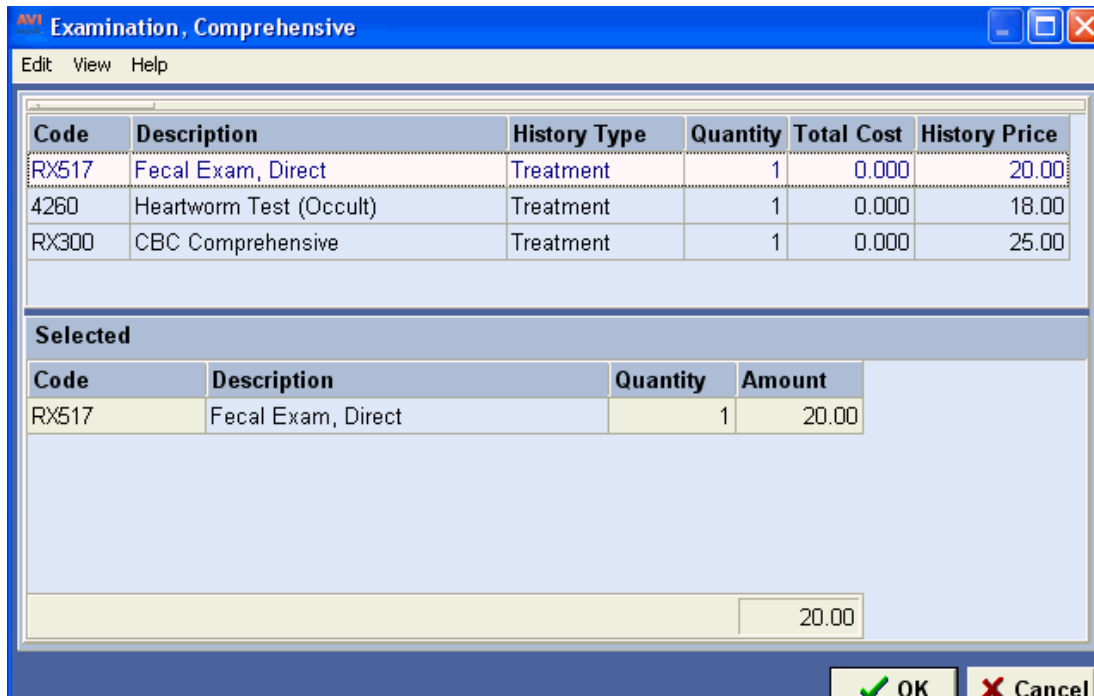
- Locate the desired service in the Treatment List and open the Change Treatment window.
- From the "Associated Entries" tab link the desired entries and check the option "Prompt for Linked Entries".
- With this option checked the Pick List window will automatically open at the time the parent treatment is added into Medical History. Tag-a-longs will also be included in the Pick List window.

Utilizing the Pick List Window

- Add the service in Medical History that has linked entries and is set to prompt for linked entries.
- In the Pick List window choose the entries to post to Medical History by clicking on the entries, pressing the Spacebar or using right-click Select. For the number of times you left-click on an associated entry or press the Spacebar, the dispensing quantity will increase for that entry.

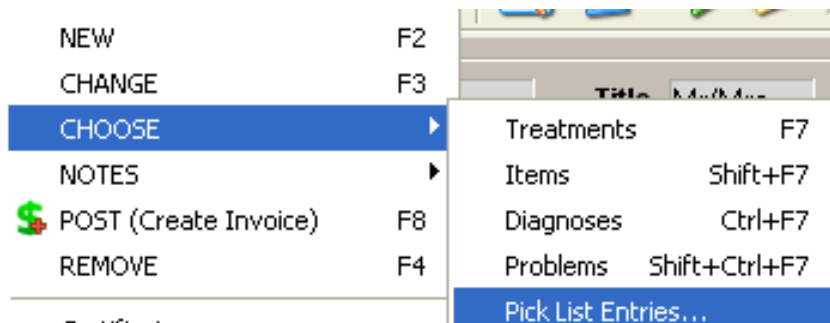


- The selected entries to be posted will appear at the bottom of the Pick List window.
- When ready to post the selected entries click OK.



Treatment List

- To access the Pick List window from Medical History select the parent treatment and use right-click Choose, Pick List Entries.



Print on invoice

AVImark allows you to print the inventory usage for the treatments performed on the client invoice.

- On the Associated Entries tab, select **Print on invoice**.

Add an inventory usage surcharge

- With certain Action codes for a treatment, you may add a surcharge to the price of the treatment. The surcharge amount will either be the Average Cost or the Retail Price of any inventory item used. This allows you to set a “base” price to the treatment to cover labor and other overhead plus a surcharge depending on how much inventory is used.
- To add the **Retail Price** of inventory used to the price of the treatment, specify the **Ampersand (&)** as one of the Action codes for the treatment.
- To add the **Average Cost** of inventory used to the price of the treatment, specify the **plus sign (+)** as one of the Action codes for the treatment.

Link Associated Treatments/Diagnosis/Problems

You may link associated treatments, diagnosis, and/or problems with the selected treatment. Also called “Tag-a-long” treatments, these treatments, diagnosis, or problems are entered into the Medical History of the patient at the time the original (parent) treatment is added. There is no built-in discounting capability with linked treatments as there is with Treatment Groups.

- On the Associated Entries tab, **right-click, Choose** and click **Treatments, Diagnosis** or **Problems** to display the appropriate list.
- Add treatments and/or diagnosis using the same procedures as discussed in the topic, “*Attachments: Associate Treatments/Items on page52*”.

Create a Treatment Group

Treatment Groups serve two purposes. First they allow you to enter several treatments and items into the Medical History of the patient by entering only one code. Second, they allow discounts on the treatments and items included in the group. In addition, AVImark gives you the ability to link multiple groups together. One or more Treatment Groups can be linked to an “overall parent” Treatment Group which allows a single, combined group to be added to a patient’s Medical History. When several Treatment Groups are linked to a collective “parent group”, the individual prices of all group components will be prorated from the group price set for the parent group (if Use Normal prices is not selected.)



Your Treatment List may be better organized if you keep all of your Treatment Groups in a Treatment category called “Treatment Groups”. All Treatment Groups, wherever they are in your Treatment List, will be displayed in red. In addition, the Treatment Group description itself will not be recorded in the Medical History area, only the components of the group.

- Create a new treatment, preferably within the Treatment Groups category, and assign a Code and Description. For assistance in adding this treatment, refer to the topic, “*Add a Treatment*” on page 42 .
- TAB to the **Action Codes** field and if not already there, select the **G** Action code.
- When the G action code is added the Associated Entries Tab will be automatically renamed Grouped Entries
- Click **Done** to add the new Treatment.

Add Treatment Group components

If adding a new treatment you must first save the treatment before working with the Associated Entries tab.

- In the Change Treatment window click the Associated Entries tab
- Add Treatments, inventory, and/or diagnosis using the same procedures as discussed in the topic, “*Associated Entries*” on page 51.
- To edit the quantity of each component, double-click or **right-click**, change on the component.

Include Tag-a-longs?


“Tag-a-long” treatments are formally Linked Treatments. You cannot add Linked Treatments to a Treatment Group. However, a treatment in your Group Components window may have Linked Treatments associated to it.

- If applicable, select **Include Tag-a-longs?** to allow any linked treatments that belong to any of the treatments within the Group Components window to be included in the Treatment Group.

Charge normal prices

Treatment Groups may be priced the *same as or lower than* the sum of the price of the components that make up the group.

- To charge normal prices for the components in the group, select **Charge normal prices**.
- To discount the prices of the Group Components, enter a price in the **Change Treatment** window that is lower than the total as indicated in the Group Components window. On the invoice, the components will be prorated to match the total group price.

	To learn more about:	Search the Help for:
	Linking Treatments, Inventory, Diagnosis	Associated Treatments
	Link Inventory and Specify Usage	Inventory Usage
	Create Treatment Groups	Treatment Groups

Adding Additional Data Fields

AVImark allows you to define additional data fields for any treatment in your Treatment list to give you a formal way of recording certain medical-related data, lab data, physiological signs, or any other specific data for a particular treatment. For detailed instructions on how to set up Additional Data Fields, refer to “*CHAPTER 25: ADDITIONAL DATA FIELDS*”.

Advanced Tab Values

Vaccine

The Vaccine field allows you to select a default vaccine for the treatment to be automatically chosen when the treatment is performed (typically rabies vaccinations). Vaccine codes are entered in the Vaccine Table of System Tables. For more information on setting up the Vaccine Table, refer to “*CHAPTER 2: SYSTEM TABLES*”.

- If appropriate, use the drop-down list and select the correct vaccine for the treatment.

Remind as


In AVImark, reminding for treatments and inventory items is primarily controlled by Reminder Templates. “Remind as” allows you to use the reminder setup of another treatment.

- Enter up to 3 Treatment codes that you wish the patient to be reminded for when this treatment is performed. In this way, you do not need to set up a Reminder Template for this treatment.

Weight Surcharge

The Weight Surcharge percentage value allows you to cause the amount you charge for a treatment to increase depending on the normal weight you have specified for each species in the Species Table of System Tables and the weight of the patient you are currently treating.

- If applicable, use the **Weight Surcharge** field UP and DOWN ARROWS to specify a percentage.

	To learn more about:	Search the Help for:
	Pricing based on patient weight Setting up the Species System Table	Weight surcharge Species Table

Follow-up

The Follow-up field allows you to specify the values that will determine how patients receiving the selected treatment will be handled by the AVImark Follow-up function. For a detailed discussion on the AVImark Follow-up feature, refer to “CHAPTER 27: THE FOLLOW-UP LIST”.

- If appropriate, type in the field the specific number of days, after which receiving the treatment, you want the patient to be included on the Follow-up list.

Follow-up Critical?

This option allows you to identify the follow-up to be of critical importance.

- If appropriate, select **Follow-up Critical?**.

Subject

The Subject field defaults to the Treatment description. You may assign a different subject or reason if you wish.

- If appropriate, assign a different subject or reason.

Company

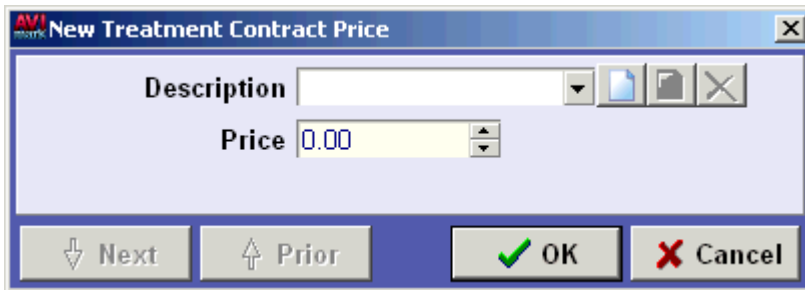
Having the ability to assign company numbers to individual codes as well as entire categories allows detailed reporting by company to be much more accurate. This same number can be assigned to multiple items.

- If appropriate enter the desired company number for reporting purposes.

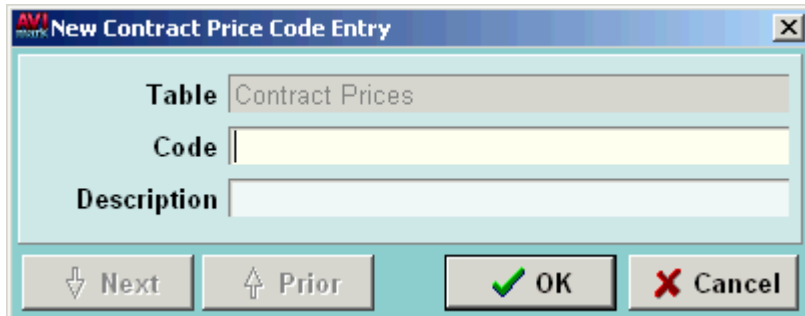
Contract Prices Tab Values

This tab allows contract prices to be defined for Treatments. Before contract prices can be defined, descriptions for the prices must be created. These descriptions can be created from either the Contract Prices Tab or from the Contract Pricing Table within System Tables. For detailed information on adding new Contract Pricing entries to System Tables, refer to “CHAPTER 2: SYSTEM TABLES”.

- To create a new description from the **Contract Prices** window, **right-click** and from the shortcut menu click **New** to display the New Treatment Contract Price window.



- In the **Description** field, click the New button to display the New Contract Price Code Entry window.



- Type a single character code in the **Code** Field.
- Type the description for the new entry in the **Description** field and click **OK**.

Documents Tab Values

AVImark allows you to associate a Microsoft Word document or Star Office document with a treatment. You can print this document at the time it is first entered into the Medical History of the patient or at the time the invoice is printed, depending on what Action Code you enter for the treatment.

- To enter the document name, **right-click** and from the shortcut menu click **New** to display the
- New Treatment Species Entry window.
- Use the **Species** drop-down list and select the appropriate species.
- Use the **Document** field browse button to open the folder of your MS Word Documents.

Treatment List

- Select the appropriate document and click **OK**.



By default, the document will print when the invoice is printed for the client. If you specify the At sign (@) Action Code for this treatment, AVImark will print the document at the time the service is entered into the Medical History area of the patient instead of when the invoice is printed.

Whiteboard Tab Values

The Whiteboard tab of the Change Treatment window allows you to specify the applicable values that will be used in grouping patients and treatments together on the Whiteboard. For detailed information on the AVImark Whiteboard feature, refer to “*CHAPTER 19: WHITEBOARD*”.

Whiteboard

This field allows you to select the Whiteboard category you wish to assign to this specific treatment. These categories are set up in the Whiteboard Categories Table within System Tables.

- Use the drop-down list and select the appropriate Whiteboard category.

Include Tag-a-longs on Whiteboard

This option allows you to include tag-a-longs when adding a Treatment Group to the Whiteboard Schedule tab.

Frequency

This field holds the default value for the frequency (number of times this service is to be administered daily) when this code is added to Whiteboard.

- Use the UP and DOWN ARROWS or type in the number to enter the default value for the Frequency.
- In the second field specify the frequency of **times per day** or **hour interval**.

Laboratory Tab Values

From the Laboratory tab of the Change Treatment window information related to lab machines and this treatment will be defined.

- In the **DICOM** sub-tab is related information to a new interface with Sound Technologies and the ability to work with DICOM images in AVImark.
- The **Instrument Types** sub-tab displays which instrument was used to define result fields linked to the selected treatment.
- The **Labs** sub-tab contains information when the treatment is associated with the IDEXX VetLab Station. From this tab you will select **right-click** New and select the appropriate lab company in order to make an IVLS association with this treatment.

Treatment Right-Click Menu

Within the Treatment List window there are several other features found in the shortcut menu. Click the right mouse button (called **right-click**) to display the shortcut menu.

Add a duplicate treatment

AVImark lets you add a new treatment to your list that is a duplicate of one that you already have entered. This will be very useful if you are adding several treatments that have the same characteristics.

- From your Treatment List, select the treatment you wish to duplicate.
- **Right-click** and from the shortcut menu click **Another** to display a duplicate Change Treatment window.
- Enter a new **Treatment Code** for the duplicate treatment as well as any other necessary changes and click **Done**.

Select

- You may choose treatments to be added to Medical History, Estimates, Whiteboard, Appointment Calendar and Treatment Groups.
- With the correct treatment selected **right-click Select**.
- The treatment will be displayed in the **Selected** window to the left.

Edit

Use the Edit menu to select treatments or to undo or redo changes to a treatment.

View

From the View shortcut menu you can Refresh the window, customize columns, view the Entry History for this treatment, Preview or Hide text associated with the treatment or you can choose how to sort the window. If you have customized the display by arranging and adding or removing columns you can print the display by using the Print option from the View menu

Entry History

Use this option to view a history of changes made to the selected treatment.

- Select a treatment and choose **right-click View, Entry History**.
- View date and time change was made, logged in user who made the change and a description of the change that was made.
- Click **Done** to close the window.

Move treatments to another category

You may easily move one or more treatments from one category to another.

- With the correct treatment selected **right-click** and from the shortcut menu click **Move**.
- You will need to click **Yes** to confirm and click the **Treatment Category** name you wish to move the treatment to.

Print a treatment label

You may print labels similar to prescription labels for any treatment in the list. For a detailed discussion on printing labels, refer to “*CHAPTER 15: PRESCRIPTION LABELS*”.

- From the **right-click** shortcut menu, click **Drug Label** to display the AVImark® Drug Label window.
- Enter the appropriate information you wish to appear on the label and click **Print**.

Display and print graphs

For any given treatment, you may display one or more graphs showing production, profit, trends, and so on. You may display and print graphs using either AVImark’s Graphing feature or Excel. This option is selected in the Advanced area of Hospital Setup.

- From the **right-click** shortcut menu, point to **Graph** and click the graph you wish to display.

Instructions

You may attach take-home instructions to any treatment to be printed automatically on the client invoice.

- With the correct treatment selected, **right-click** from the shortcut menu and click **Instructions** to display the Doctor’s Instructions window.
- Type the take-home instructions. All the available AVImark note feature options are available from this window.
- Click **Done** to save the Doctor’s Instructions.

Markup

Use this option to mark up the selected treatment. To learn more about marking up treatments refer to “*MARK UP TREATMENT PRICES*” 39 page 42.

Price History

You are able to track the price history of your services. Anytime the price of a treatment is changed the Date, Time, User that made the change, Action of the change, and the Old and New prices will be stored for that code. The Action of the price change refers to whether the price was changed manually, or changed using the Mark up feature. This information can be printed using the print option in the top left hand corner of the Price History window.

- With the correct treatment selected, **right-click** and from the shortcut menu click **Price history** to display the Treatment Price History window.

Set up a treatment reminder

AVImark allows you to set up a Reminder Template for any treatment. For a detailed discussion on setting up Reminder Templates, refer to “*CHAPTER 11: REMINDERS*”.

- With the correct treatment selected **right-click** and from the shortcut menu click **Reminder**.
- You will need to click **Yes** to create one and display the Reminder Template.
- Specify the various conditions for the reminder and click **Done**.

View and print the Whogot list

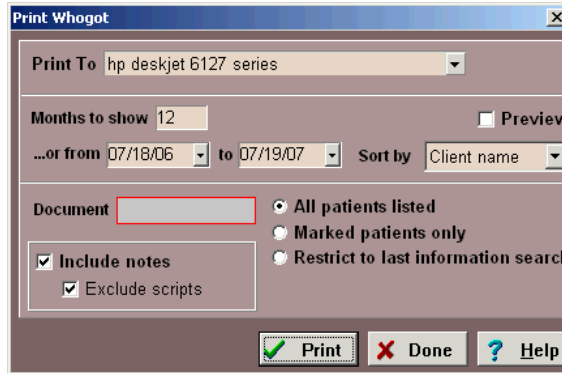
The AVImark Whogot list is a sorted list of all patients and their owners that have received a specified treatment, inventory item, or diagnosis. Use the Whogot list to view, sort, print, or go to the CID of any patient receiving the chosen treatment, item or diagnosis in a specified number of months.

DENTAL FLUORIDE TREATMENT			
Date	Client	Patient	Qty
07-19-07	Bhatt, Julie	Duke	1
07-19-07	Bhatt, Julie	Prince	1
07-19-07	Kientz, Gayla	Drambuie	1
07-19-07	O'Neil, Mary	Mickey	1
07-19-07	Rice, Michael	Miss Kitty	1
07-19-07	Robinson, Elizabeth	Kasha	1
07-19-07	Smith, John	Chester	1
07-19-07	Stoeckel, Tracy	Cinder	1
07-19-07	Wombwell, John	Crockett	1
02-14-06	Price, Elizabeth	Maggie	1
07-22-05	Marco, Willie	Molly	1
07-17-05	Butler, Melissa	Shelley	1
07-16-05	Flowers, Nelda	Chip	1
07-14-05	Shinn, Georgie	Sniff	1
07-11-05	Thomas, Margie	Albert	1
07-01-05	West, Carlos	Drexler	1
06-30-05	Salario, Chris & Susanne	Gidget	1
06-27-05	Tabbah, Dawn	Domino	1
06-25-05	McCelvey, Margaret	D. J.	1
06-24-05	Di Fiore, Ann	Sammy	1
06-13-05	Adams, Henry	Keno	1

306 entries shown.

- With the appropriate treatment selected, **right-click** and from the shortcut menu click **Whogot** to display the Treated Patients window.
- Click **Print** or to preview the report onscreen select **Preview** and click **Print**.

- Click **Done** to return to the Treated Patients window.
- Select the individual patients from the list you wish to print by clicking on the patient name and press the SPACEBAR.
- Click **Print** to display the Print Whogot window.



- If applicable, use the **Criteria** menu to sort and/or limit the number of patients selected. Use the **Print to** drop-down list and select the correct Printer.
- Using the **Months to show** field, enter the number of months to display or use the drop-down calendar to specify the period you wish to print for.
- If applicable, double-click in the **Document** field to select a Document from among your MS Word documents.
- Select **Include notes** to include the notes about the treatment performed for each patient on the list.
- To omit the prescription messages, check the **Exclude scripts** checkbox.
- If applicable, click on **Restrict to last query** to limit the printing of documents to only those patients chosen when you ran the last information search.

Undelete a deleted treatment

AVImark gives you the ability to undelete any treatments that may have been deleted.

- In the Treatment list window, **right-click** and from the shortcut menu click **Undelete** to display the Undelete Treatments window.
- If applicable, select the **Undelete to a Lost and Found category** to place the revived treatments in a category named L & F with the date and time they were revived.
- Click on the treatment you wish to undelete. Use the SPACEBAR or **right-click** and from the shortcut menu click **Select**. The treatment will appear bolded when selected.
- After all treatments have been selected, click **Undelete**.

Print the Treatment List

- On the Treatment List window, open the **Print** menu. Point to **Reports** and click **Treatment List** to display the Print Treatment List window.
- Use the **Category** drop-down list and select the individual category to print or select **All Categories**.
- To include linked inventory and treatments as well as take-home instructions on the report, select the **Print details** option.
- To print a 13-month production report with usage and sales totals, select the **Production totals** option.


Sort the Treatment List report

By default, AVImark will sort the treatments within each category by Code, Price or Description. If the “Category” box is unchecked, AVImark will simply print all treatments in the order in which selected.

Print a Travel Sheet

The Travel Sheet is a customized list of commonly used treatments that you use during the visit with the patient. By default, only those treatments with the “F” Action code will be included on the Travel Sheet.

- On the Treatment List window, open the **Print** menu. Point to **Reports** and click **Travel sheet** to display the Print Travel sheet window.

	To learn more about:	Search the Help for:
	Contract Pricing	Contract Prices
	Whogot List	Whogot
	Treatment Reports	Travel Sheet; Print Treatment List

CHAPTER 4: INVENTORY LIST

The Inventory List contains all of your items that you sell to your clients or use in treating your patients. In setting up your Inventory List you will need to create Inventory Categories, assign prices, set up your Vendor list, and so on. The AVImark Inventory List identifies Inventory Categories, items within each category and a Selected Items section.

In this chapter you will learn about...

- | | |
|---|--|
| » Setting up Your Inventory Categories on page 61 | » Sales Tab Values on page 74 |
| » Category and Item colors on page 63 | » Whiteboard Tab Values on page 74 |
| » Inventory Categories Shortcut Menu on page 63 | » Inventory List Shortcut Menu on page 75 |
| » Removing an Inventory Category on page 63 | » View and print the Whogot list on page 82 |
| » Moving to Treatments on page 63 | » Inventory Reports and Documents on page 83 |
| » Undeleting Inventory Items on page 64 | » Update Inventory Sales on page 84 |
| » Add an Inventory Item on page 64 | » Add Vendors on page 84 |
| » Advanced Tab Values on page 70 | » Create Purchase Orders on page 85 |
| » Contract Prices Tab Values on page 71 | » Purge Orders on page 87 |
| » Documents Tab Values on page 71 | » AVP for Canadian Clinics on page 87 |
| » Pharmacy Tab Values on page 72 | » Needs List on page 88 |
| » Purchasing Tab Values on page 73 | » Intelligent Inventory on page 91 |

Setting up Your Inventory Categories

R_x

- To work with your Inventory List, open the **Work with** menu and click **Inventory**.

Code	Description	Measu	On Han	Charge
4910	Coupon, Sentinel	Ea	1200	-4.00
4900	Filaribits + 180 mg 100 ct	Bottle	6	38.84
4901	Filaribits + 180 mg 200 ct	Bottle	30	51.13
4902	Filaribits + 180 mg 50 ct	Bottle	40	15.50
4903	Filaribits + 60 mg 100 ct	Bottle	10	14.13
4904	Filaribits + 60 mg 200 ct	Bottle	5	23.42
4914	Filaribits Plain 180 mg 100ct	Bottle	10	0.00
4913	Heartgard Plus 0-25 lbs	Each	20	2.88
4923	Heartgard Tablets 51-100 lbs	Each	20	11.15
4924	Heartgard Tablets up to 25 lbs	Each	10	5.10
4909	Heartgard for Cats (Purple) 5-15 lbs	Tablet	5	5.79
4916	Heartgard for Cats (Red) 0-5 lbs	Each	15	3.30
4912	Interceptor Coupon \$2.00	Ea	219	-2.00
4905	Interceptor FlavrTab-Brown (2-10 lbs)	Tablet	12	5.81
4906	Interceptor FlavrTab-Green (11-25 lbs)	Tablet	123	5.55
4907	Interceptor FlavrTab-White (51-100 lbs)	Tablet	99	9.33
4908	Interceptor FlavrTab-Yellow (26-50 lbs)	Tablet	130	7.96
4915	ProHeart 6 (Moxidectin 3.4 mg/mL)	ML	0	25.10

Add or change an Inventory Category

- Point in the Inventory Categories list area. **Right-click** and from the shortcut menu click **New** to display the New Inventory Category window.

- Enter the appropriate information into each field and click **Done** to add or change the category.

Category

This is the descriptive name give to each category to identify it in most AVImark functions.

- Type the name you wish to give the new category.



If you would like your categories to be in numerical order, change each category name by typing a number in front of a category name. For example: 01Pharmacy, 02Supplies.

Report Codes

Report codes are user-defined letter characters used for grouping specific items together on certain reports (Treatment Control Log, Patients by Treatment, Income by Treatment, Transaction Summary, and Sales Summary). You can have up to 7 codes for each category. Some codes are pre-programmed. They are:

- Injections (I)
 - Lab Services (L)
 - Prescriptions (P)
 - Surgery (S)
 - Vaccinations (V)
- If appropriate, use the drop-down list and select the correct Report code(s) for the new category.



AVImark already has controlled substance tracking and is dependant upon the "C" action code on the appropriate item.

Markup Percentage

The Markup percentage is the default percentage used to mark up the prices of items in this category.

- If appropriate, type in the field to specify the Markup Percentage for this category. You can always type a different Markup percentage at the time you initiate the actual mark up process.

Account number

To interface with QuickBooks, you will need to enter the income account number that you set up in QuickBooks as the account in which to record the income generated from inventory within this category. If specified, this


account number is used as the account name for QuickBooks instead of the Inventory Category name.

- If appropriate, type in the field to specify the income account number that you have set up in QuickBooks.

Report name

The Category Report name must be given for use in the End-of-Period reports. This name can be different or the same as what was typed in the Name field.

- Type a Category Report name.

	To learn more about:	Search the Help for:
	Printing Reports Using Report Codes QuickBooks® Interface	Inventory Reports Inventory Report Codes QuickBooks®

Whiteboard

This field represents the Whiteboard categories that are set up in “System Tables”. They are used to group and organize items on the ‘Whiteboard’.

- Use the **Whiteboard** drop-down list and select the Whiteboard category you wish to assign to this category.

Company

Having the ability to assign company numbers to individual codes as well as entire categories allows detailed reporting by company to be much more accurate. This same number can be assigned to multiple items.

- If appropriate enter the desired company number for reporting purposes.

Category and Item colors

AVImark will highlight the category and item names in red, blue, or gray depending on the following criteria:


- If the On-hand Quantity of an item is equal to or less than its Order Point, the category name and item itself will be displayed in red.
- Items that are currently on an open order will be displayed in blue.
- Obsolete items (items that you want to keep on the list, but not for selection) are displayed in gray.

Inventory Categories Shortcut Menu

In the Inventory Categories list window, there are several things that you can do from the shortcut menu. Use the **right-click** option in the Inventory Categories list to see the shortcut menu.

Removing an Inventory Category

- Select the Inventory Category you wish to remove. **Right-click** and from the shortcut menu click **Remove**.
- You will need to click **Yes** to confirm.

	<i>Removing an Inventory category also removes all items within that category.</i>
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Moving to Treatments

Use this feature to move an Inventory Category and all its items to the Treatment List. However, all of the notes, drug label messages, doctor’s instructions, and other values specifically for inventory, will NOT be moved.



It is highly recommended that you make a backup of your AVImark data before proceeding. Once the move procedure is completed, there is no undo option.

- Select the Inventory Category you wish to move. **Right-click** and from the shortcut menu click **Move to Treatments**.
- You will need to click **OK** to confirm.

Undeleting Inventory Items

AVImark gives you the ability to undelete Inventory Categories or individual items from within the category.

- Point in the Inventory Categories window. **Right-click** and from the shortcut menu click **Undelete Categories** to display the Undelete Item Categories window.
- Use the SPACEBAR or **right-click** and from the shortcut menu click **Select** to choose the categories and/or individual items you wish to undelete. Items that are selected will be bolded.

Add an Inventory Item

The right half of the Inventory List Window displays the Item List for the category currently selected. Working in this window, you are able to add new items and/or specify information about each of the existing items you use.

- Select the correct Inventory Category to add the items to.
- **Point** in the Items List for section. **Right-click** and from the shortcut menu click **New** to display the New Item window.

General Tab Values



Find

Use the Find menu button to quickly locate a field.

- Click the **Find** button.
- From the drop-down list select the field you are searching for and click OK. AVImark will then place the cursor in the selected field.

Code

You may use up to 8 characters, either numbers, letters, (or a combination of both) for an item. AVImark will not allow you to use the same Inventory Code for a treatment, diagnoses or another item that has already been entered.

- Type a code for the item.

Description

This is the description that will appear on all Period reports and in the Medical History of those patients receiving the item.

- Type the description you wish to assign the item.

On Hand quantity

This is the number of items as dispensed that you have on hand. For example, you are trying to specify the on hand quantity for some capsules for which the minimum you can order from the vendor is a bottle of 100. You have 3 bottles of 100 capsules plus 52 more in an open bottle. You would set the On Hand quantity to 352.

- Use the drop-down list to display the calculator and to enter the current on hand quantity.

Location

This field identifies the location code or where the item is located in your facility.

- If appropriate, type a location code for the item. For example, CAB1.

Action codes

Action codes cause AVImark to perform certain functions.

- If applicable, use the drop-down list and select the appropriate Action codes.

The following table lists each Action code and its meaning:

CODE	NAME	EXPLANATION
A	Automatic drug label prompt	Prompts the drug label window to display when the service is entered into medical history.
C	Controlled Substance	Marks this service as a controlled drug and includes it on the controlled substance report.
D	Treatment causes death	Automatically marks the patient as deceased when the service is entered into medical history.
E	Print one document/patient	Prompts a document for each patient that has received the same service in medical history for a client.
F	Include on travel sheet	Includes this service on the travel sheet that can be printed through AVImark.
H	Handling fee	Includes the handling fee with the price of the service.
I	Integer pricing	Rounds the price of a service that has a partial quantity to the price of the nearest whole number.
K	Prompt to include in group	When included within a treatment group this action code will prompt you if you would like to enter the service in medical history.
L	Subject to local sales tax	Includes the local/PST tax to the price of this service as defined in hospital setup.
M	Intramuscular injection fee	Includes the intramuscular fee to the price of this service as defined in hospital setup.
N	Don't print on patient chart	Suppresses the printing this service on the patient's printed chart.

P	Prescription fee	Includes the prescription fee to the price of this service as defined in hospital setup.
Q	Don't post to invoice	Will not include this service on the printed invoice. This service will be entered in medical history and displayed as already posted.
R	Rabies vaccination	Indicates this service as a rabies vaccination. This action code will also prompt for the vaccine information window.
S	Subject to state sales tax	Includes the state/GST tax to the price of this service as defined in hospital setup.
T	Subject to state and local sales tax	Includes both state & local/PST & GST tax to the price of this service as defined in hospital setup.
V	Intravenous Injection Fee	Includes the intravenous fee to the price of this service as defined in hospital setup.
W	Auto prompt for vital signs	Automatically prompts for the Medical Condition Record (SOAP) to display when this service is entered into medical history.
X	Causes sex alteration	Automatically updates the patient's sex to spayed, neutered or gelded depending on the previous sex and species of the patient.
Y	Assign certificate number	Automatically assigns a certificate number when this service is entered into the patient's medical history.
Z	Dietary item	Includes this service on the dietary tab at the bottom of the CID screen.
\$	Include price on chart	This action code will include the price of the service on the printed patient chart.
-	Obsolete treatment	Marks a service as obsolete and grays it out on the list. When trying to add this service to medical history you will be warned that it is an obsolete service.
@	Auto prompt for document	Prompts to print the linked document. Without this action code AVImark will automatically print the linked document with the invoice.
#	Don't print form/document	Suppresses the printing of the linked form or document.
*	Auto prompt for notes	When entered into medical history it will automatically prompt for a notes window to enter information about the service.
?	Schedule follow-up at posting	This action code will display the follow-up window when posting instead of when the service is entered into medical history.
!	Show warning if quantity is equal to 1	This action code will display a warning if the service entered in medical history has a quantity equal to one.
^	Not for retail	Does not allow the staff members to sell this item.
(Control refills	Allows you to control refills on this service if a drug label is being printed.
=	Don't use additional fees	Does not allow the additional fees (intra-muscular, intravenous, prescription, etc) to be added to the price of the service.
%	Auto copy notes into medical history	Copies entered notes on the treatment automatically into a notes window in medical history.
~	Auto hide notes in medical history	Will not display the entered medical history notes on the CID screen.

[Auto prompt for the microchip number	Automatically prompts for the patient’s microchip number and will enter the number into the patient’s area of the CID screen.
{	Auto prompt for the locator number	This action code will prompt for a number to be used with ePetRecords.
}	Don’t add to Whiteboard	Will not include this service on the whiteboard automatically when entered into medical history.
1	Don’t post from Whiteboard	When posting services from the whiteboard this action code will not post the service to medical history.
<	Include on the E-Travel sheet	Includes this service on the electronic travel sheet.
2	Show Notes in Medical History	This action codes allows you to view specific notes with the option selected of “Show all with note action” in medical history.
5	Dental Assessment	Automatically prompts the dental chart to display when the service is entered into medical history.

Price

The field represents the amount you wish to charge a client for the item. AVImark also gives you the ability to use Integer pricing based on the use of the “I” Action code. When you sell or dispense a decimal quantity of the item (1.5 cc), AVImark will price the item as though you entered the next higher whole number. That is, what you would charge for the quantity of 2 cc.

- Type in the field the normal amount you wish to charge the client for the item.

Unit Cost

In this field you will specify the cost for the item. For example, say you have some dog food that is ordered by the case of 24. The cost for the package (24) is \$18.25. The Unit Cost field should display \$0.76 which is the Package Cost divided by 24.

- Type in the field the Unit Cost.

Package Cost

In this field you will specify the package cost for the item. For example, say you have some dog food that is ordered by the case of 24. The cost for the case of 24 is \$18.25. Therefore, the Package Cost entered for this item will be \$18.25.

- Type in the field the Package Cost for the item.

Class (Discount)

AVImark uses the Class field to determine which items are to be discounted to which client class. You may set up an unlimited number of client classes as well as treatment and inventory classes. For more information on discount classes, refer to Chapter 1 Hospital Setup, Sub-,Tab Discount.

- If applicable, use the **Class** drop-down list and select the appropriate discount class.

	<p>To learn more about: Setting up client discounts</p>	<p>Search the Help for: Inventory discounts; Class discounts</p>
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Report Codes

Report codes are user-defined letter characters used for grouping specific items together on certain reports (Treatment Control Log, Patients by Treatment, Income by Treatment, Transaction Summary, and Sales

Summary). You may use up to 3 codes for each item. There are some codes that are pre-programmed for use with the most common reports. They are:

- Lab services (L)
 - Surgery (S)
 - Injections (I)
 - Prescriptions (P)
 - Vaccinations (V)
- If appropriate, use the drop-down list and select the correct report code(s) for the item.



If you need to assign a separate inventory-specific report code to both the individual items and Inventory categories AVImark will honor both report codes.

Measure

This field is used to specify how the item is dispensed. This list is set up in the Units of Measure Table in the AVImark System Tables. For more information on setting up your Unit of Measure Table, refer to “Chapter 2: SYSTEM TABLES”.

- Type an abbreviated unit of measure or use the drop-down list and select how the item is dispensed.

Fee

In addition to the add-on fees applied through the use of certain Action codes, AVImark also gives you the ability to define a customized list of fees that will be added to the price of the item. These fees are set up in the Special Fees Table in the AVImark System Tables. For more information on setting up the Special Fees Table, refer to “Chapter 2: SYSTEM TABLES”.

- If appropriate, use the drop-down list and select the special fee code for this item.

Photo

AVImark lets you link any .bmp; .jpeg; or .tif image to the item to be printed on the client invoice attached to the doctor’s instructions for the item. When this item is included on the client invoice, this photo will be printed at the bottom half of the invoice along with take-home instructions. However, if there are no take-home instructions linked with the item, the photo will not be printed.

- If appropriate, use the **Photo** field browse button  to open the folder of your saved photo files.



To learn more about:
Using photos in AVImark

Search the Help for:
Photos; Inventory Photos

Category

This field allows you to move inventory from one category to another.

- If appropriate, use the drop-down list and select the correct category.

Expires/Expires after __ days

This field displays the expiration date of the current purchased “lot”. Both expiration fields can be used at the same time. If the manufacture expiration date is set for the item along with the number of days past dispensing of the drug, AVImark will print the date that is closest to the dispensing date.

- Using the **Expires** field drop-down calendar, enter the expiration date of the current purchased “lot” and/or specify the number of days this product will expire when the item is being dispensed.

UPC Code

This field allows you to enter a UPC number for the specific item. This can be done either by typing the code or swiping the UPC code label to input the number.

- If appropriate, enter the UPC number for the item.

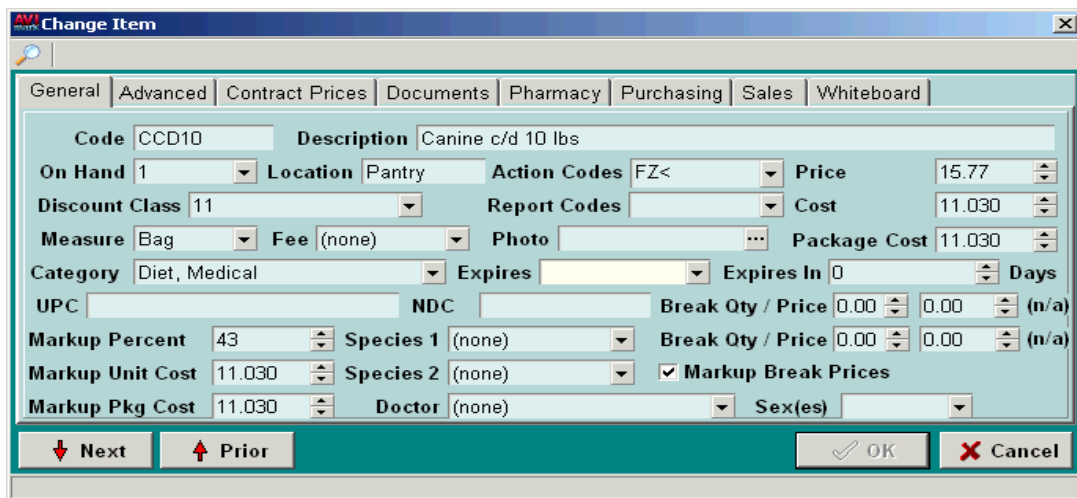
MSDS (NDC, DIN)

This field identifies the location of the MSDS sheet for the item. If you have a “DEA” number entered in Hospital Setup on the Demographics tab, this field will automatically change to “NDC” number and is used primarily for Kentucky, Michigan, California, New York and Alabama hospitals. Refer to the item documentation to determine the correct NDC identification for each controlled substance. For Canadian users, the label “DIN” will show instead of the MSDS. For the KASPER, CURES, and ASAP reporting function to work, each controlled substance will also need to have a “C” Action Code assigned.

Break QTY/Price

This is the number and price of the item above which (or up to the second Quantity Break) you would charge the client. AVImark gives you two levels for setting up quantity break prices. When you set the price in this field, you are entering the price charged for the Quantity Break number, NOT the price for each individual item. Just to the right of the Quantity Price amount, AVImark will display the markup percentage for this break price

- In the first column simply type the quantity or use the Up and Down Arrows to specify the quantity.



- In the second column type the break price or use the Up and Down Arrows to specify the price for the quantity break price (not for each item).

Mark up Break Price(s)

This option allows you to have AVImark mark up the quantity break prices whenever you mark up retail prices.

- If appropriate, select **Mark up Break Prices**.

	To learn more about:	Search the Help for:
	Setting up break pricing	Break pricing
	Marking up break prices	Markup break prices

Mark up Percent

With inventory items, you can specify a mark up percentage for both the Inventory category and the item itself. When a mark up is done, AVImark will honor any item-specific percentages rather than the percentage set for the category.

- If appropriate, type in the field to specify the mark up percentage for the item using a whole number.

Mark up Unit Cost

If you use the purchase order function, AVImark will automatically maintain this amount as the highest cost you have ever paid for the item. This field will represent the cost that you want future mark ups to apply to. Furthermore, it is used as the basis for inventory surcharges added to treatments.

- If appropriate, type in the field to specify the cost that is the same as or higher than the current Unit Cost.

Mark up Pkg Cost

If you use the purchase order function, AVImark will automatically maintain this amount as the highest cost you have ever paid for the item package. This field will represent the cost that you want future mark ups to apply to. Furthermore, it is used as the basis for inventory surcharges added to treatments.

- If appropriate, type in the field to specify the cost that is the same as or higher than the current Package Cost.

Species 1 & Species 2

You may specify up to 2 different species for the item. If you attempt to enter the item into the Medical History of a patient whose species is other than what is selected here, the item will NOT be entered and you will receive a warning message.

- If appropriate, use the drop-down list and select the appropriate species limitation for the item.

Doctor

AVImark allows you to specify a default doctor that will automatically be selected when you enter the item into the Medical History area of the patient.

- If appropriate, use the drop-down list and select the default doctor for the item.

Sex(es)

You may restrict certain items to patients of a certain sex.

- If appropriate, use the **Sex(es)** field drop-down list to select the appropriate Sex code(s).

Advanced Tab Values

Follow up

The Follow-up area allows you to specify values that will determine how patients receiving the selected items will be handled by the AVImark Follow-up function. For a detailed discussion on the AVImark Follow-up feature, refer to "*Chapter 27: FOLLOW-UP LIST*".

Follow-up in...days

- If appropriate, type in the field to specify the number of days, after which receiving the item, you want the patient to be due for a Follow-up.

Follow-up Critical

This option allows you to identify the follow-up to be of critical importance.

- If appropriate, select Follow-up **Critical**.

Subject

The Subject field defaults to the Item description. You may assign a different subject or reason if you wish.

- If appropriate, assign a different subject or reason.

Remind as

In AVImark, reminding for inventory items and treatments is primarily controlled by Reminder Templates. “Remind as” allows you to use the reminder setup of another item. Code and description drop-down lists are available for display and selection of all Treatment, Inventory, and Diagnosis codes containing reminder templates.

- If appropriate, use the drop-down list to select either the code or description of the treatment, item, or diagnosis that you wish the patient to be reminded for when this item is dispensed. In this way, you do not need to set up a Reminder Template for this item.

Company

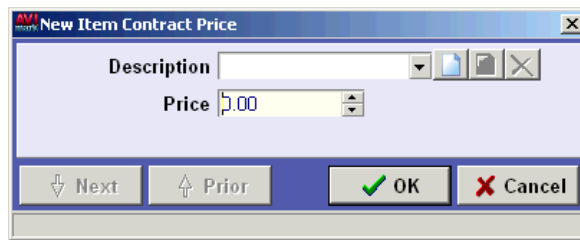
Having the ability to assign company numbers to individual codes as well as entire categories allows detailed reporting by company to be much more accurate. This same number can be assigned to multiple items.

- If appropriate enter the desired company number for reporting purposes.

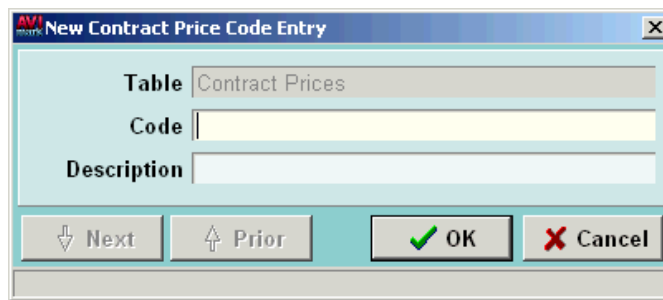
Contract Prices Tab Values

If adding a new item you must first save the item before setting up the contract prices information for the item. This tab allows contract prices to be defined for Inventory. Before contract prices can be defined, descriptions for the prices must be created. These descriptions can be created from either the Contract Prices Tab or from the Contract Pricing Table within System Tables. For detailed information on adding new Contract Pricing entries to System Tables, refer to “CHAPTER 2: SYSTEM TABLES”.

- To create a new description from the **Contract Prices** window, **right-click** and from the shortcut menu click **New** to display the New Item Contract Price window.




- In the **Description** field, click the New button  to display the New Contract Price Code Entry window.




- Type a single character code in the **Code** Field.
- Type the description for the new entry in the **Description** field and click **OK**.

Documents Tab Values

If adding a new item you must first save the item before attaching documents to the item. AVImark allows you to associate a Microsoft Word document or Star Office document with an Inventory item. You can print this document at the time it is first entered into the Medical History of the patient or at the time the invoice is printed, depending on what Action Code you enter for the item.

- To enter the document name, **right-click** and from the shortcut menu click **New** to display the New Item Species Entry window.
- Use the **Species** drop-down list and select the appropriate species.
- Use the **Document** field browse button  to open the folder of your MS Word Documents.
- Select the appropriate document and click **OK**.

 *By default, the document will print when the invoice is printed for the client. If you specify the “at” symbol (@) action code for this item, AVImark will print the document at the time the item is entered into the Medical History area of the patient instead of when the invoice is printed.*

Pharmacy Tab Values

Refill time/treatment link

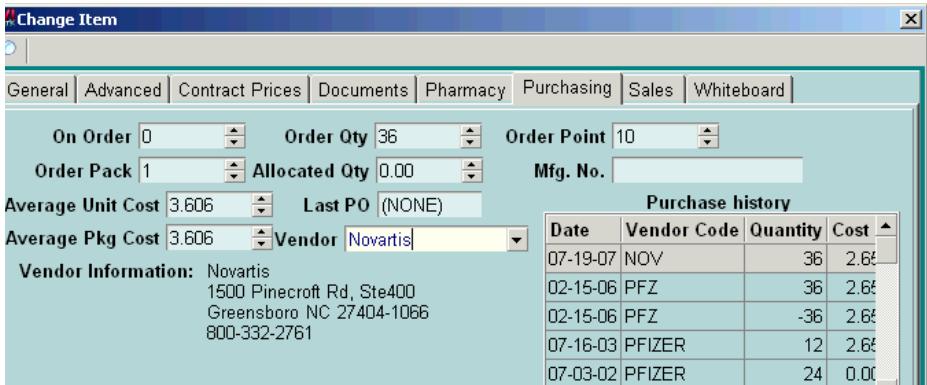
If you wish to track the number of refills that is allowed, you will need to specify the length of time (in months) that refills are allowed. You may also specify a Treatment Code in the next field to indicate that, if this treatment is performed on the patient, it is as though the refill count should be restarted at the beginning.

- To control refills, use the UP and DOWN ARROWS to indicate the number of *months* during which refills are allowed.
- To track refills starting with a certain Treatment code, enter the code in the next field.
- To select the **Minimum interval between refills...days**, use the UP and DOWN ARROWS to specify the minimum number of days between refills.

Container__with__

Certain inventory items may be designated as controlled substances based on the “C” Action Code, which may then be tracked and reported by AVImark. Recent requirements by AAHA specify that controlled substances must be tracked by what is called a Container Identification Number. These two fields are used for tracking controlled substances that have Container ID numbers.

- Use the **Container** field UP and DOWN ARROWS to specify the Container ID number.



Purchase history			
Date	Vendor Code	Quantity	Cost
07-19-07	NOV	36	2.66
02-15-06	PFZ	36	2.66
02-15-06	PFZ	-36	2.66
07-16-03	PFIZER	12	2.66
07-03-02	PFIZER	24	0.00

- In the **With** field, use the UP and DOWN ARROWS to enter the quantity of this item that remains in the current container.

Strength (California)

The state of California requires that CA drug labels show the drug strength and the number of refills on each label. This field will automatically appear if the state of California is entered within the demographics tab of hospital setup. To properly label each prescription AVImark meets this requirement by including strength of the drug and the number of refills on all dispensed prescription medication. For clinics not in California that wish to use this field you must set the Hospital Advanced Option, **Display Drug Strength** to True.

Purchasing Tab Values

If adding a new item you must first save the item before setting up the purchasing information for the item. Each item has its own purchasing and sales information. Some of this information, such as “On Order” and “Monthly Sales”, is maintained by AVImark. Other values must be defined for the purchase ordering features of AVImark to work.

On Order

This is the quantity of this item that is currently in an Open Order. AVImark sets this number for you when you create a Purchase Order.

Order Qty

This is the quantity of this item (as dispensed in your units of measure) that you want to order at one time. The Order Quantity must always be either equal to or a multiple of the Order Pack. When you create the order AVImark will order a sufficient quantity, in order to bring the On Hand quantity ABOVE the Order Point. If the on hand quantity is less than the order point AVImark will first order a multiple of the order pack to bring the on hand amount to the order point. Then it will add the quantity needed to bring the on hand above the order point.

- Use the UP and DOWN ARROWS to specify the appropriate Order Quantity, equal to or a multiple of the Order Pack or simply type in the desired amount.

Order Point

This is the quantity that you want to maintain on hand.

- Use the UP and DOWN ARROWS to specify the minimum quantity that you want to keep on hand or simply type in the desired amount.

Order Pack

The Order Pack is the quantity of the item that is shipped in the manufacturer’s package. It is also called the “Case lot” quantity. For example, MEDS1 are shipped from the manufacturer in bottles of 100 tablets. Even though you dispense the item one tablet at a time, the Order Pack would be 100.

- Use the UP and DOWN ARROWS to specify the quantity of this item as dispensed per manufacturer’s package or simply type in the desired amount.

Allocated Qty

In this field, AVImark tracks the quantities of an item entered into the Medical History of a patient, but not posted to accounting. With this feature, when the item needs to be ordered, AVImark will consider its Allocated Quantity to determine the quantity needed in order to bring the On Hand quantity above the Order Point.

Mfg Code

This field displays the manufacturer’s item number.

- Type the manufacturer’s item number.

Average Unit Cost

When setting up a new item, you can leave this field blank and AVImark will automatically set it to what was specified for the current “Unit Cost” field. AVImark maintains the item cost as the average price paid from any vendor and will include shipping, taxes, and any other costs incurred when the item was ordered. AVImark uses this cost to calculate stock levels on the Inventory Report.

Average Pkg Cost

When setting up a new item, you can leave this field blank and AVImark will automatically set it to what was specified for the current “Package Cost” field. AVImark maintains the item cost as the average price paid from any vendor and will include shipping, taxes and any other costs incurred when the item was ordered. AVImark uses this cost to calculate stock levels on the Inventory Report.

Last P/O

This field represents the Purchase Order number of the last order that was created.

Vendor

This field allows you to enter and display the vendor information from where the item is purchased. When a vendor is selected for an item, that vendor's name, address, phone number, fax number, contact's name, email address, and website will now be displayed beneath the vendor drop-down list.

- Use the **Vendor** drop-down list to select the correct Vendor for the item.

Purchase history

This field displays the Purchase Order history for the item. This area allows entries corresponding with Purchase Orders, to be viewed in a READ ONLY view.

- To view the history of an entry, select the appropriate entry.
- **Right-click** and from the shortcut menu click **Order Details**.

Sales Tab Values

For each inventory item, AVImark tracks sales information including units sold by month and year-to-date sales.

Sales, Last 12 months		
	Sold	Sales
Jan	12	145.75
Feb	20	232.15
Mar	34	383.35
Apr	8	102.55
May	0	0.00
Jun	0	0.00
Jul	0	0.00
Aug	0	0.00
Sep	0	0.00
Oct	0	0.00
Nov	0	0.00

MTD Sold/Sales

This value is maintained by AVImark as the month-to-date units sold and total sales.

YTD Sold/Sales

This value is maintained by AVImark as the year-to-date units sold and total sales.

Sales, Last 12 months

You may view the demand statistics for each month of the year.

Whiteboard Tab Values

The Whiteboard tab of the Change Item window allows you to specify the applicable values that will be used in grouping patients and inventory together on the Whiteboard. For detailed information on the AVImark Whiteboard feature, refer to "*CHAPTER 19: WHITEBOARD*".

Whiteboard

This field allows you to select the Whiteboard category you wish to assign to this specific item. These categories are set up in the Whiteboard Categories Table within System Tables.

- Use the drop-down list and select the appropriate Whiteboard category.

Frequency

This field holds the default value for the frequency (number of times this service is to be administered daily)

when this code is added to Whiteboard.

- Type in the field to enter the default value for the Frequency.

Inventory List Shortcut Menu

Within the Inventory List window there are other features found in the shortcut menu. Use the **right-click** option to see the shortcut menu.

Add a duplicate item

AVImark allows you to add a new item to your list that is a duplicate of one that you have already entered. This will be useful if you are adding several items that have the same characteristics.

- From your Item List, select the item you wish to duplicate.
- **Right-click** and from the shortcut menu click **Another** to display a duplicate New Item window.
- Enter a new **Inventory Code** for the duplicate item as well as any other necessary changes and click **Done**.

Select

Select items to be added to medical history, a Need List or a Purchase Order.

- With the correct item selected, **right-click** and from the shortcut menu click **Select** or press the **Spacebar**.
- Items will be added to the **Selected** area.

Edit Changes

Use the Edit menu to select items or to undo or redo changes to an item.

View

From the View shortcut menu you can Refresh the window, customize columns, view the Entry History for this item, Preview or Hide text associated with the item or you can choose how to sort the window. If you have customized the display by arranging and adding or removing columns you can print the display by using the Print option from the View menu.

Entry History

Use this option to view a history of changes made to the selected item.

- Select an item and choose **right-click View, Entry History**.
- View date and time change was made, logged in user who made the change and a description of the change that was made.
- Click **Done** to close the window.

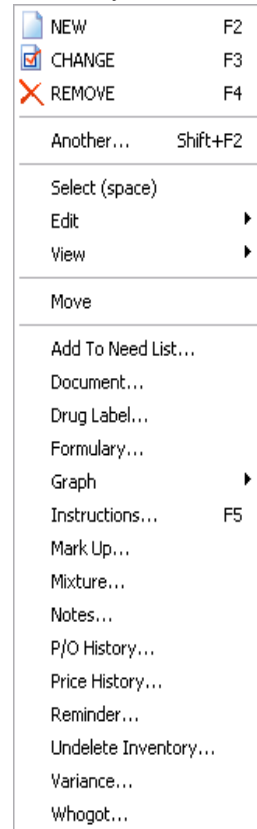
Move items into another category

You can easily move items from one category to another.

- With the correct item(s) selected, **right-click** and from the shortcut menu click **Move**.
- You will need to click **Yes** to confirm the move.
- Click the appropriate category name to move the item to.

Add items to the Need List

The Need List is like a shopping list of items that need to be ordered. You may create one or more Need Lists these lists can be created either before or after items are selected.



Before items are selected:

- From your Inventory List window, open the **Need List** menu. Click **New** to display the Create Need List window.
- Type a **Name** for this Need List and click **Continue** to display the new Need List.
- Click **Done** to close the new Need List.
- Select the items you wish to add to the new Need List. Use the SPACEBAR or F10 to place the items in the **Selected Items** area.
- Open the **Need List** menu and click **Choose** to display the Choose Need List window.
- Select the correct Need list and click **Continue**.
- You will need to click **Yes** to confirm adding the items and display the Need List.
- Click **Done**.

After items are selected:

- Select the items you wish to add to the new Need List. Use the SPACEBAR or F10 to place the items in the **Selected Items** area.
- Open the Need List menu and click **New** to display the Create Need List window.
- Type a **Name** for this Need List and click **Continue** to display the new Need List. The items previously selected will be added to the new list.

Once items are selected for a Needs List it will appear in green in the inventory list.

Drug label

AVImark allows you to print prescription labels for any item in the list.

- From the **right-click** shortcut menu, click **Drug Label** to display the AVImark Drug Label window.
- Enter the appropriate information you wish to appear on the label and click **Print**.

Display and print graphs

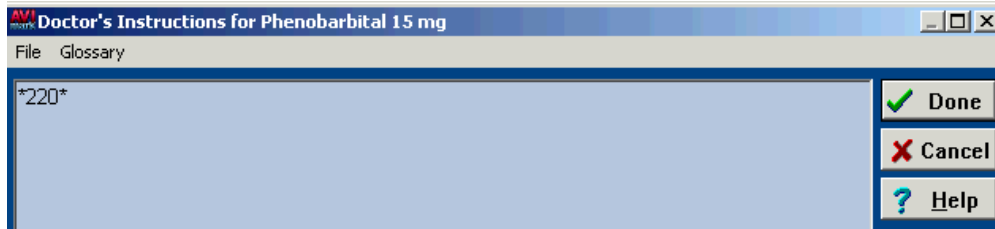
For any given item, you may display one or more graphs showing production, profit, trends, etc. You may display and print graphs using either AVImark's Graphing feature or Excel. This option is selected in the Advanced area of Hospital Setup.


- From the **right-click** shortcut menu, point to **Graph** and click the graph you wish to display.

Instructions

You may attach take-home instructions to any item to be printed automatically on the client invoice. If you have several items in your list that have similar Doctor's Instructions, AVImark gives you the ability to include tag-a-long (duplicate) instructions without having to type them again for every similar item. In addition, you may select Doctor's Instructions that you have saved in your Note Glossary. For detailed information on tag-a-long instructions and the AVImark Note Glossary, refer to "*CHAPTER 30: NOTE GLOSSARY*". With the correct item selected, **right-click** and from the shortcut menu click **Instructions** to display the Doctor's Instructions window.

- Type the take-home Doctor's instructions. All the available AVImark note feature options are available from this window.
- To include a tag-a-long instruction, type the **Item Code** of the "parent" item enclosed in asterisks. For example, (*220*).



 *Tag-a-long Instructions must be instructions from another inventory item, not a diagnosis or treatments.*

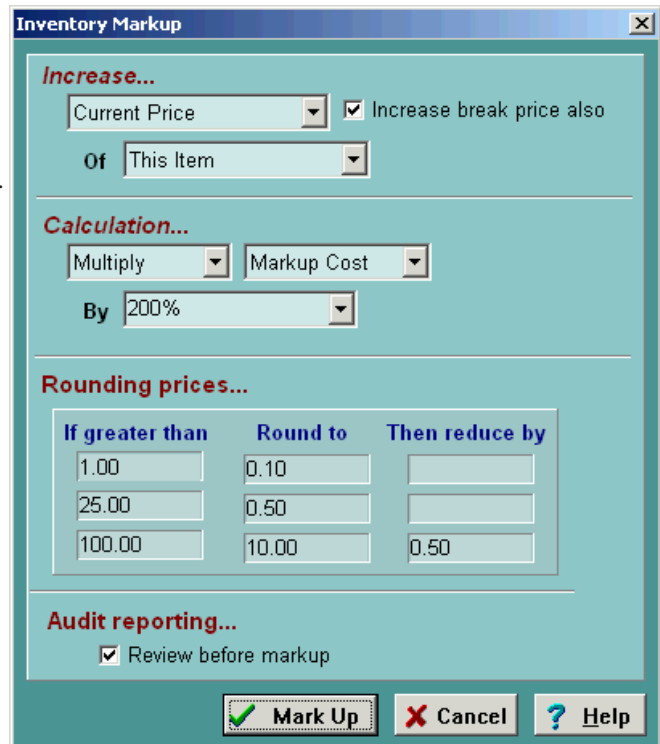
- Click **Done** to save the Doctor's Instructions.
- These instructions can be viewed or modified from the Medical History area. Once the item has been entered select **right-click Instructions**.

Mark up

AVImark allows you to mark up three specific inventory values; current prices, mark up percentages, and mark up costs for individual items. You may mark up your item prices in three ways; by category, all items, or by individual item. The Mark up Percentage is set up on each item.

This is the default percentage that AVImark will use to mark up the item prices (unless otherwise directed). You may also specify a Mark up Percentage on individual items. Item-specific Mark up Percentages will override the Mark up Percentage of the category during the mark up process.

- To mark up items in one category, select the category you wish to mark up prices for.
- Point to the Item List window and **right-click** to display the shortcut menu.
- Click **Mark Up** to display the Inventory Mark up window.



- By default, the Inventory Mark up window will increase **Current Price** of items in **This Category**.
- The default **Calculation** will **Multiply** the **Mark up Cost** by the **Mark up Percentage**.

Rounding prices

You may round off marked up prices larger than a certain amount to the nearest increment. Furthermore, you may then subtract a specified amount from the result of the mark up to arrive at the final price.

For example: *Say you would like to mark up all prices in the selected category by 5% and at the same time round off all prices over \$10.00 to the nearest 10 cents, all prices over \$25.00 to the nearest \$1.00 minus 5 cents, and finally all prices over \$100.00 to the nearest \$10.00, minus 5 cents.*

- In this example, the first thing you would do is enter 5 in the **By %** field.

- In the Rounding Prices dialogue box, click on the top line in the “*If greater than*” column. Specify 10.00 in this field and 0.10 in the “*Round to*” column.
 - Next, on the middle row, specify 25.00 in the left column, 1.00 in the center column and 0.05 in the right column.
 - Finally, on the third row, specify 100.00 in the left column, 10.00 in the center column and 0.05 in the right column.
- To review the proposed mark up results before finalizing the mark up process, ensure the **Review before mark up** box is checked and click **Continue**.
 - By utilizing the Hospital Advanced Options for rounding you can have AVImark default to the specified rounding information.

The Mark up Analysis window

In the Mark up Analysis window you can review the proposed mark up results before actually marking up your prices. Once you click **Continue** from this window, AVImark will mark up prices as directed.

Category	Code	Description	Price	Actual Mar	Markup Percent	New Price
Flea, Tick & Pest	I1329	Advantage Dog 11-20lbs teal	35.00	100	100	70.00
Flea, Tick & Pest	I1330	Advantage Dog 21-54lbs red	22.50	25	25	28.50
Flea, Tick & Pest	10	Canned Dog Food	0.00	130	130	0.00
Flea, Tick & Pest	ASDFASI	Advantage Cat 0-9lbs orange	34.00	2	2	35.00
Flea, Tick & Pest	I1327	Advantage Cat 9-UPlbs purple	35.00	100	100	70.00
Flea, Tick & Pest	I1331	Advantage Dog 55-100lbs blue	116.65	130	130	269.50
Flea, Tick & Pest	I1332	Advantage one free tube	0.00	130	130	0.00
Flea, Tick & Pest	I903	Allerseb-T Shampoo 8oz	17.00	130	130	39.50
Flea, Tick & Pest	I1501	Collar F&T Cat Breakaway	9.40	130	130	21.70
Flea, Tick & Pest	I977	Collar F&T Dog Dursban	130.00	150	150	329.50
Flea, Tick & Pest	I1503	Collar F&T Dog Ovitrol Plus	12.40	150	150	31.00
Flea, Tick & Pest	I1502	Collar F&T Dog VetKem	9.90	125	125	22.30
Flea, Tick & Pest	I14174	Collar Flea Cat Ovitrol	12.11	125	125	27.50
Flea, Tick & Pest	I14173	Collar Flea Dog Ovitrol	10.15	130	130	23.40
Flea, Tick & Pest	I1505	Collar Preventic Dog	13.28	125	125	30.00
Flea, Tick & Pest	I3001	Duocide F&T Spray water 16oz	11.76	150	150	29.50
Flea, Tick & Pest	I4555	Flea Combs Neon-Multicolor	1.68	250	250	5.90

Additional columns can be displayed in the Markup Analysis window by setting the appropriate default Hospital Setup Advanced Option.

- From the CID select the **Wrench** speed bar icon.
- In the **search** field type **sales** and select the option **Show Sales Data By Default** and set the value to **True**.

The Markup Analysis window will now display the Fiscal Income Fiscal Sold, Projected Income, Income Difference and Income Difference Percent. The sales data amounts will be figured at the bottom of the analysis window.

- In the Markup Analysis window select **View, Show Sales Data** from the menu area to hide or display the 5 additional income columns.

In the Markup Analysis window you can customize the view by arranging columns and using the Show/Hide Group Panel options from the View menu.

Save and Print Markup Values

In the Analysis window you will have the ability to save the markup values to a .dat file and also open previously saved files.

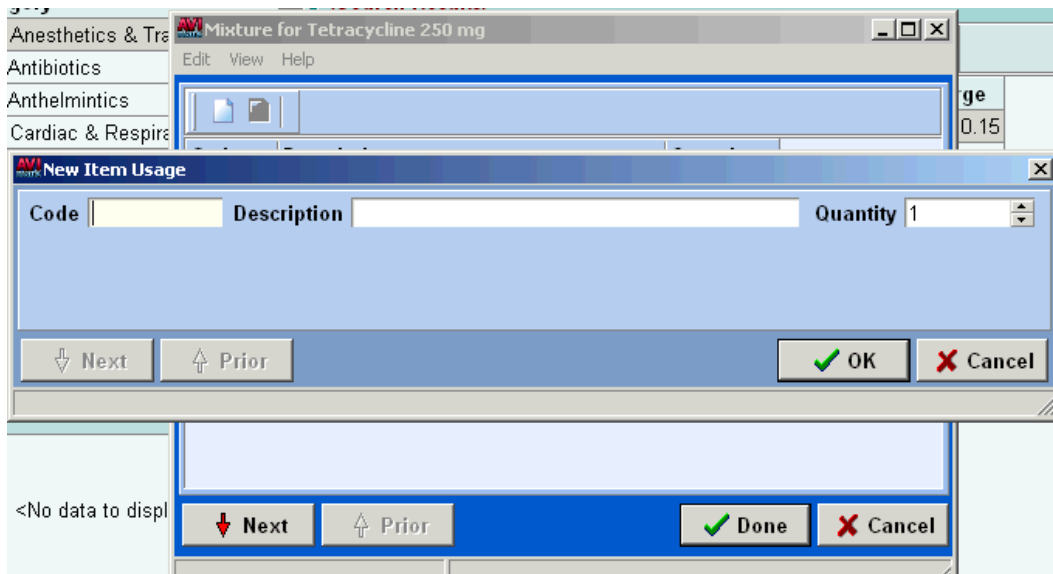
- In the Markup Analysis window select **File, Open** from the menu to open a previously saved .dat file that contains markup pricing information.
- To save markup values currently displayed in the Analysis window select **File, Save As** from the menu area. Enter a file name, location and click Save.
- To print the markup analysis values select **File, Print** from the menu.

	To learn more about: Marking up prices	Search the Help for: Markup
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Mixture items

This option allows you to link items to the parent code. The number of items that can be linked is unlimited. When the parent code is added to a patient’s Medical History, the linked items will be deducted from their individual on-hand quantities, but they will not be directly added into Medical History. The linked items can be viewed by clicking on the Inventory Used attachment to the right of the Medical History area. The linked items’ quantity will be a multiple of the parent code’s quantity. The linked items do not have the ability to Surcharge by the linked items cost or price.

- In the **Mixture for** window, **right-click** and from the shortcut menu click **New** to display the New Item Usage window.



- Type the appropriate **Code** or **Description** for the item. Typing a few characters of the description will display a menu from which you can select the correct item.
- Use the **Quantity** field UP and DOWN ARROWS to specify the mixture and click **OK**.

	To learn more about: Creating mixtures	Search the Help for: Mixture; Mixture items
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Notes

You may use this feature to add notes about the item. These notes do not appear anywhere else and are not printed on the invoice. However, all of the other AVImark note feature options are available within the note

window. For detailed information on adding notes, refer to “*CHAPTER 30: NOTE GLOSSARY*”.

P/O History

With this feature you are able to view, change and print the purchase history for any item. You can also return items to a vendor from this purchase history window.

- With the correct item selected, **right-click** and from the shortcut menu click **P/O History** to display the Purchase Order History window.
- To change information about an item, select the correct item.
- **Right-click** and from the shortcut menu click **Change** to display the Change P/O History window.
- Make any necessary changes and click **Done**.
- To return an item to the vendor, select the correct item from the Purchase Order History window.
- **Right-click** and from the shortcut menu click **Return** to display the Change P/O History window.
- The quantity field will be displayed as a negative quantity. Make any necessary changes and click **Done**.
- To print the purchase history, open the **Print** menu to display the Print Purchase Order History window.

Price History

You can track the price history of your items. When the price of an item has been changed, the Date, Time, User that made the change, the Action of the change, and the Old and New price will be recorded. The Action of the price change refers to whether the price was changed manually, changed using purchase orders, or changed using the mark up feature.

- With the correct item selected from the Inventory list, **right-click** and from the shortcut menu click **Price History** to display the Item Price History window.
- To print the report, open the **Print** menu and click **Report**.
- To preview the report onscreen, select **Preview** and on the **Print** menu click **Report**.

Set up an item reminder

AVImark allows you to set up a reminder template for any item. For a detailed discussion on setting up Reminder Templates, refer to “*CHAPTER 11: REMINDERS*”.

- With the correct item selected **right-click** and from the shortcut menu click **Reminder**.
- You will need to click **Yes** to create one and display the Reminder Template.
- Specify the various conditions for the reminder and click **Done**.

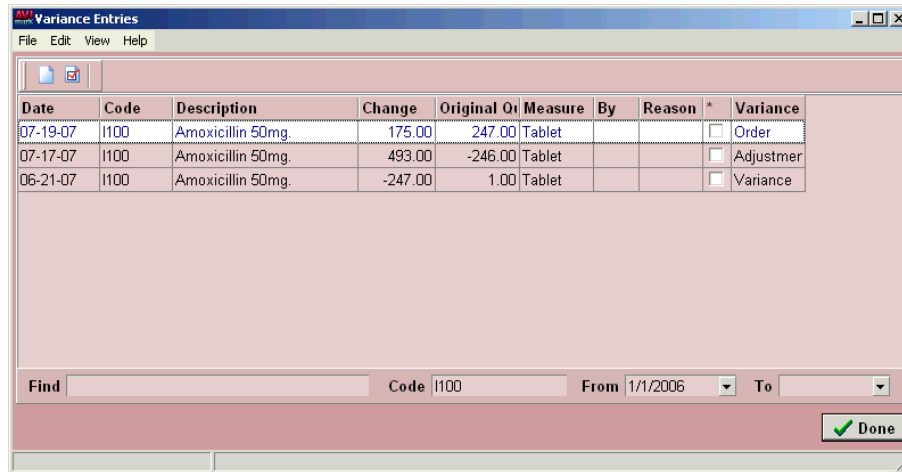
Undelete a deleted item

AVImark gives you the ability to undelete any item that may have been deleted.

- In the Inventory List window, **right-click** and from the shortcut menu click **Undelete** to display the Undelete Inventory Items window.
- If applicable, select the **Undelete to a Lost and Found category** to place the revived items in a category named L & F with the date and time they were revived.
- Click on the item you wish to undelete. Use the SPACEBAR or **right-click** and from the shortcut menu click **Select**. The item will appear bolded when selected.
- After all items have been selected, click **Undelete**.

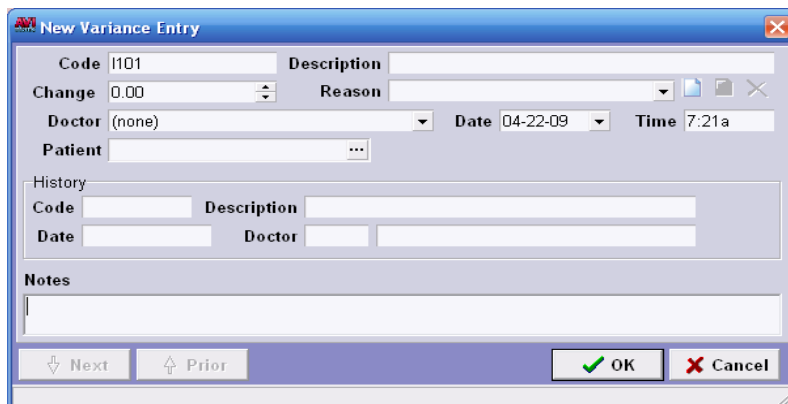
Variance

The Variance option gives you the ability to report controlled substances that are unused for whatever reason appropriate (i.e. spilled, lost, unfit, etc.).



Variances are recorded when you enter items into the Medical History of the patient, thus, making the entry specific for that patient. Any changes made to the items on-hand quantity, whether it is increased, decreased, removed, etc., will also be recorded in the Variance Entries window. You may also enter variances through the Variance Maintenance window. Variance entries will print on the Controlled Substance Report. To input a variance on an item, you must set up entries in the Variance Table of the AVImark System Tables. For detailed information on setting up your Variance Table, refer to “CHAPTER 2: SYSTEM TABLES”.

- With the correct item selected, **right-click** and from the shortcut menu click **Variance** to display the Variance Entries window.
- **Right-click** and from the shortcut menu click **New** to display the New Variance Entry window.



- The **Code** for the selected item will already be displayed. TAB to have the Description field entered for you.
- Use the **Change** field UP and DOWN ARROWS to enter the appropriate amount.
- TAB to the **Reason** field and use the drop-down list to select the appropriate reason.
- Use the **Doctor** drop-down list and select the name of the user who is making the entry.
- If appropriate, use the **Patient** field browse button to select a specific patient for the variance.
- The **Date** and **Time** fields will be entered automatically but may be changed if applicable.
- If necessary, enter any **Notes** that may be applicable for this entry and click **OK** to save.



When tracking partial quantities of a given substance that is deemed unusable, you will want to “dispense” those quantities into the Medical History area of a “waste” patient record. In other words, create a new client record named “Controlled Substances Waste”, and add “patient” records, each with a name that signifies the month and year of the waste disposal. For example: September-09, October-09, November-09, and so on. You would also need to set this “client” up as having 100% discounting applied so as not to report inaccurate income, production, or A/R numbers. Then, during a given month, you would dispose of the controlled substance waste by entering the waste quantities into the Medical History area of the appropriate patient, posting the entry, canceling the payment window and closing the invoice.



To learn more about:

Track controlled substance

Search the Help for:

Controlled substance; Tracked controlled substances

View and print the Whogot list

The AVImark Whogot list is a sorted list of all patients and their owners that have received a specified treatment, inventory item, problem, or diagnosis. Use the Whogot list to view, sort, print, or go to the CID of any patient receiving the chosen treatment, item or diagnosis in a specified number of months.

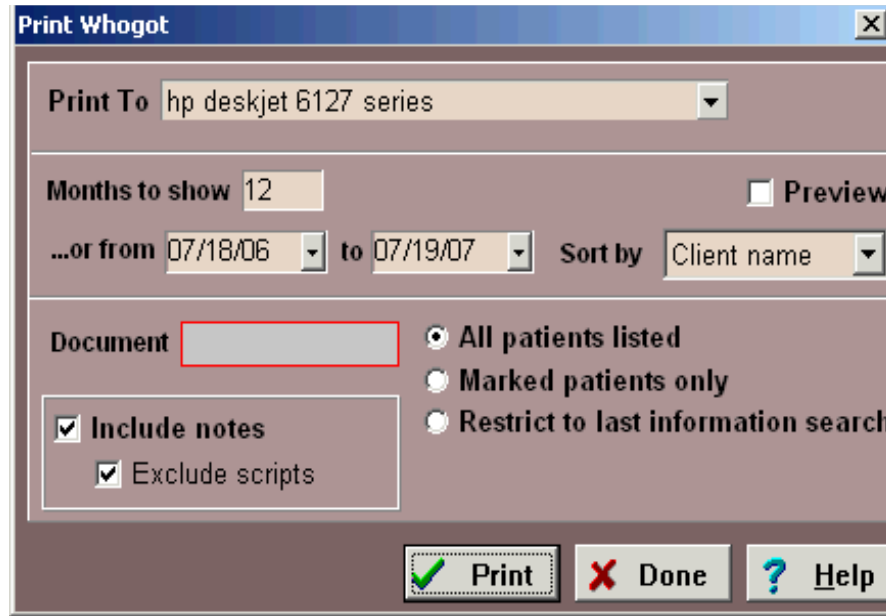
- With the appropriate item selected, **right-click** and from the shortcut menu click **Whogot** to display the Treated Patients window.

The screenshot shows a window titled 'Treated Patients' with a 'Criteria' section at the top. The main content is a table with the following data:

AMOXICILLIN 50MG.			
Date	Client	Patient	Qty
06-21-07	Ackerman, Harry	Yum Yum	1
06-21-07	Sanford, Mary	Sneakers	1
01-05-07	Johnson, Brad	Bear	2
08-16-05	Leighton, Kathleen	Alison	1
08-15-05	Ackerman, Harry	Yum Yum	1
06-22-05	Berin, Bernice	Willie	1
04-29-04	Johnson, Brad	Bear	1
08-05-02	Clark, John	Fluffy	1
05-11-90	Fischer, Kathy	Patches	10
05-07-90	Runge, Lois	Eli	10

On the right side of the window, there are three buttons: 'Go to' (with a green checkmark), 'Quit' (with a red X), and 'Help' (with a question mark).

- If applicable, use the **Criteria** menu to sort and/or limit the number of patients selected.
- Click **Done** to return to the Treated Patients window.
- Select the individual patients from the list you wish to print by clicking on the patient name and press the SPACEBAR.
- Click **Print** to display the Print Whogot window.



- Use the **Print to** drop-down list and select the correct Printer.
- Using the **Months to show** field, enter the number of months to display or use the drop-down calendar to specify the period you wish to print for.
- If applicable, double-click in the **Document** field to select a Document from among your MS Word documents.
- Select **Include notes** to include the notes about the item selected for each patient on the list.
- To omit the prescription messages, check the **Exclude scripts** checkbox.
- If applicable, click on **Restrict to last query** to limit the printing of documents to only those patients chosen when you ran the last information search.
- Click **Print** or to preview the report onscreen select **Preview** and click **Print**.

Inventory Reports and Documents

From the File menu of the Inventory List window, you may view and/or print a variety of reports and documents.

Inventory Report

The Inventory Report should be printed out at the beginning of each year. If not, AVImark will display a warning informing the user that the report has not yet been printed. The warning will persist until the report is physically printed. A specific start-of-year date can be specified in Hospital Setup, Advanced.

- On the **File** menu, point to **Print** and click **Inventory Report** to display the Inventory Report window.
- Using the **Organize by** area, select how you wish to organize the report.
- Select a **Sort by** option.
- If appropriate, select how the report will be restricted.
- If appropriate, select any **Options** that may be necessary and click **Print**. To preview the report onscreen, select **Preview** and select **Print**.

Travel Sheet

The Travel Sheet is a customized list of commonly used items that you use during the visit with the patient. By

default, only those items with the “F” Action code will be included on the Travel Sheet.

- On the **File** menu, point to **Print** and click **Travel sheet** to display the Print Travel sheet window.

Vendor List

This report allows you to view and print a list of your vendors.

Purchase Order History

Once inventory has been purchased and receipted into stock, AVImark will track past purchase orders.

Inventory Summary

AVImark will print a sales summary report showing monthly and yearly production values along with last years production and growth percentage. Profit values are also given.

Reorder Report

This report allows you to print a list of all Inventory items that have On-hand quantities equal to or below the Order Point.

Update Inventory Sales

The Update Sales option in Inventory gives you the capability to update monthly Inventory totals. These monthly totals are automatically generated at the beginning of each month for the previous month, when the message regarding “Updating Inventory Statistics” is prompted and allowed to process. If these statistics are not allowed to process at the beginning of the month, but for example, at the middle of the month, all sales for the previous month and the current month will be lumped together. Should this happen, running the Update Sales feature will reorganize these statistics to their appropriate month.

- From your Inventory List, open the **File** menu and click **Update Sales** to display the Update Inventory Sales window.



- Click **Update**. You will need to click **Yes** to confirm.
- Click **OK** when updating is complete.

Add Vendors

Before associating a vendor to a specific item or before creating orders you must first set up the list of vendors.

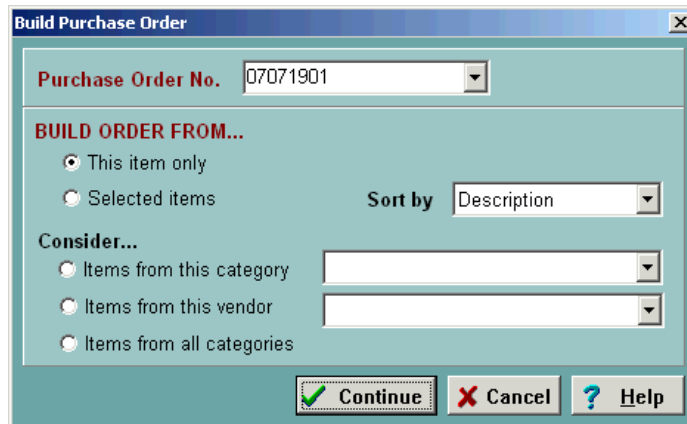
- From the Inventory List select **File** (menu), **Vendors**.
- Select **right-click New** to add a vendor.
- Enter a **Code** and vendor **Name**.
- In the **Contact** field enter the main contact person.
- Enter your **Account** number and the vendor address information.
- Click in the appropriate fields to enter the desired information.
- In the **Comments** field enter desired notes or additional information about the vendor. This information will be included on the Vendor report.

Create Purchase Orders

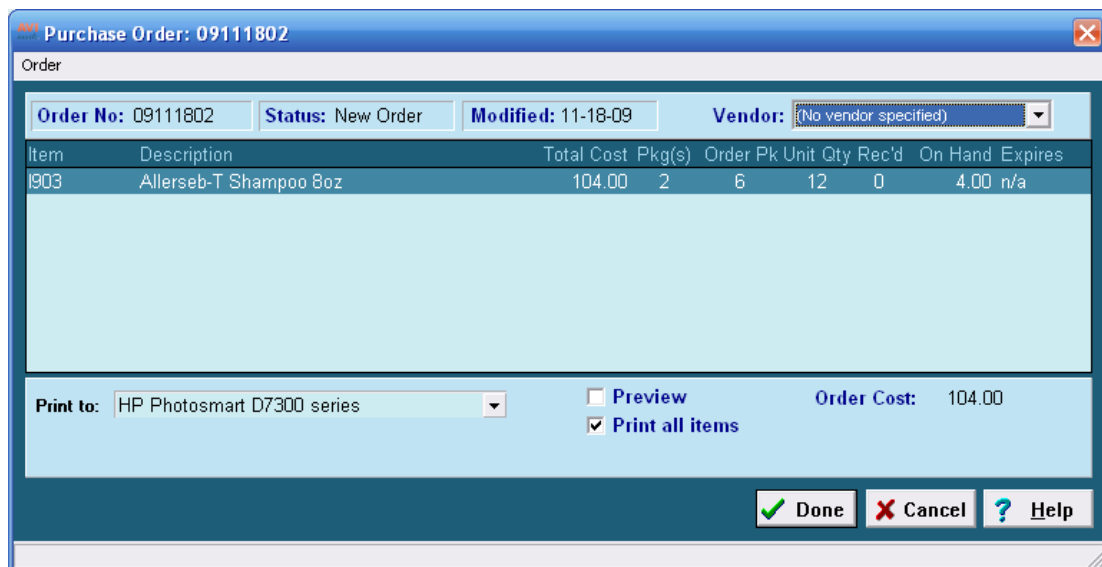
AVImark has an extensive ordering capability feature designed to handle your normal ordering needs. You may manually select the items that you wish or AVImark can automatically place items reaching their “Order Point” on the order. The process consist of three steps; building the order, printing and/or releasing the order, and receiving the order once received.

Order an individual item

- From your Inventory List, select the item that you wish to order.
- On the **File** menu point to **Order** and click **New** to display the Build Purchase Order window.



- AVImark automatically assigns a Purchase Order number of “yymmdd” plus a two digit number representing the number of purchase orders you have created today. However, you may assign your own preferred numbering sequence consisting of 8 characters or less.
- By default, AVImark will set the new order to **This item only** then click **continue**.



Order multiple items

- From your Inventory List, select the items you wish to order by clicking on the item and using the SPACEBAR to place the item in the Selected Item area.
- On the **File** menu, point to **Order** and click **New** to display the Build Purchase Order window.
- AVImark automatically assigns a Purchase Order number of “yymmdd” plus a two digit number

representing the number of purchase orders you have created today. However, you may assign your own preferred numbering sequence consisting of 8 characters or less.

- By default, AVImark will set the new order to **Selected items**.
- Click **Continue** to display the Purchase Order.

Order items that have reached their Order Point

- On the File menu, point to **Order** and click **New** to display the Build Purchase Order window.
- Select the **Consider...**option that you wish.
- Click **Continue** to display the Purchase Order.

Print and/or Release the order

AVImark gives you the ability to simply print an order, allowing you to make further changes if necessary, or release a completed order. When you release a purchase order, you are telling AVImark that no further changes are necessary and that the order is ready to be released to the vendor. Once the order has been released, no further changes can be made.

- To make a change to an item on the order, select the item and **right-click** to display the shortcut menu.
- Click **Change** to display the Change P/O Item window.
- Make the necessary changes and click **Done**.
- To print the order, open the **Order** menu and click **Print**.
- To preview the order onscreen, select **Preview** and from the **Order** menu, click **Print**.
- To release the order, open the **Order** menu and click **Release**. This will print the order and change the order status to an “Open Order”.

Receipting an order

As orders are filled from each of the various vendors and shipped, you will want to receipt the orders into stock. AVImark lets you receipt the order and specify which items were received. Of the received items you are able to indicate which ones reflect a change in price, specify what vendor the items were received from, and apply any shipping charges and taxes that have been charged to you. In addition, AVImark will create a “back order” for those items that were not received and you can receipt them if and when they do come in. If the items never show up, you may just purge the order.

- From your Inventory List open the **Order** menu and click **Choose** to display the Choose Order window.

Date	Name	Vendor Name	Status	As Of
11-18-09	09111801	Healthy Pets	Open Order	11-18-09
11-18-09	09111802	Merial	New Order	11-18-09

- Select the correct order from the list and click **Done** to display that Purchase Order.

Receipt a partial order:

- To receipt a partial order, select the top order from the list that has been received.
- To make a change to the item, (cost, amount received, and so on) **right-click** and from the shortcut menu click **Change** to display the Change P/O Item window.
- Make the necessary change(s) and click **Done** to return to the Purchase Order.

- **Right-click** and from the shortcut menu click **Receive**. The received value for the item will be set to the number ordered, divided by its Order Pack value.
- Repeat the same procedure for each item that has been received.
- On the Purchase Order window, open the **Order** menu and click **Receive** to display the Purchase Order Receiving window. It is from this window where you will enter the Vendor, Invoice number, any shipping charges, taxes, and/or other cost associated with the item.
- Click **Continue** to finish receiving the item(s) and to place the status of the order to “Back Order”.

Receipt a complete order:

- Select the correct order from the list and click **Done** to display the Purchase Order.
- On the **Order** menu, click **Receive**.
- You will receive a prompt that the quantity for each item has been set to the quantity ordered. Click **Yes**.
- To make a change to any of the items, (cost, amount received, and so on) **right-click** and from the shortcut menu click **Change** to display the Change P/O Item window.
- Make the necessary change(s) and click **Done** to return to the Purchase Order.
- On the **Order** menu, click **Receive** to display the Purchase Order Receiving window.
- Enter the Vendor, Invoice number, any shipping charges, taxes, and/or other cost associated with the order and click **Continue**. AVImark will automatically update the on-hand quantities, honor any price mark up percentages specified, and so on.

Purge Orders

AVImark gives you the ability to purge orders that are outdated or otherwise no longer appropriate.

- On the order in question, open the **Order** menu and click **Purge**. Click **Yes** to confirm.

AVP for Canadian Clinics

AVImark integrates with Associated Veterinary Purchasing (AVP) which will allow Canadian AVImark clinics that are AVP customers the ability to place an order through AVImark.

Setup

To use the AVP integration specifications must be defined in Hospital Setup Advanced area.

- From the CID open the Advanced Options by clicking on the Hammer, Wrench and Screwdriver icon.
- In the Search field type AVP.
- The AVP Billing Code is assigned by AVP and will be unique to each clinic.
- The AVP FTP Address automatically defaults to the AVP FTP address.
- Click the Directory option to enter the name of the new AVP folder that you have created in the AVImark folder.
- The FTP Password and FTP User Name will both be automatically setup.
- AVP will provide a password and user name to be entered in the Password and User Name fields.

Adding AVP Vendor

After defining the AVP specifications the AVP vendor needs to be added to the Vendor list.

- From the Inventory List choose File, Vendors from the menu.
- The Code and Name of the vendor must be AVP.

Attaching AVP Number

After defining the options in Hospital Setup a new field will be available in the Change Item window.

- In the Inventory List select the correct item and choose Change from the **right-click** menu.
- From the Advanced tab enter the billing code of the item in the AVP Number field.

Placing an Order

When placing an order for AVP you will need to select AVP as the vendor or assign the AVP vendor to all appropriate items.

- When the AVP vendor is selected a Ship To field will be displayed in the Purchase Order window.
- The Ship To field will default to the clinics location; however clicking on this drop-down list will display all possible locations, which are downloaded from the AVP webserver.

Releasing an Order

As each purchase order is released the product code(s) will be verified and the inventory status will be checked for sufficient and/or insufficient quantities. If the item is not in stock you will receive a message showing the current available quantity giving you the option to change the quantity on the order, remove the item or select a substitute.

Once the order is released AVImark exports the purchase data to a file that is uploaded via FTP to AVP. If the file is sent successfully an e-mail notification will be sent to orders@avpbc.com with the filename as the subject. The order will then be processed and the order can be received as normal.

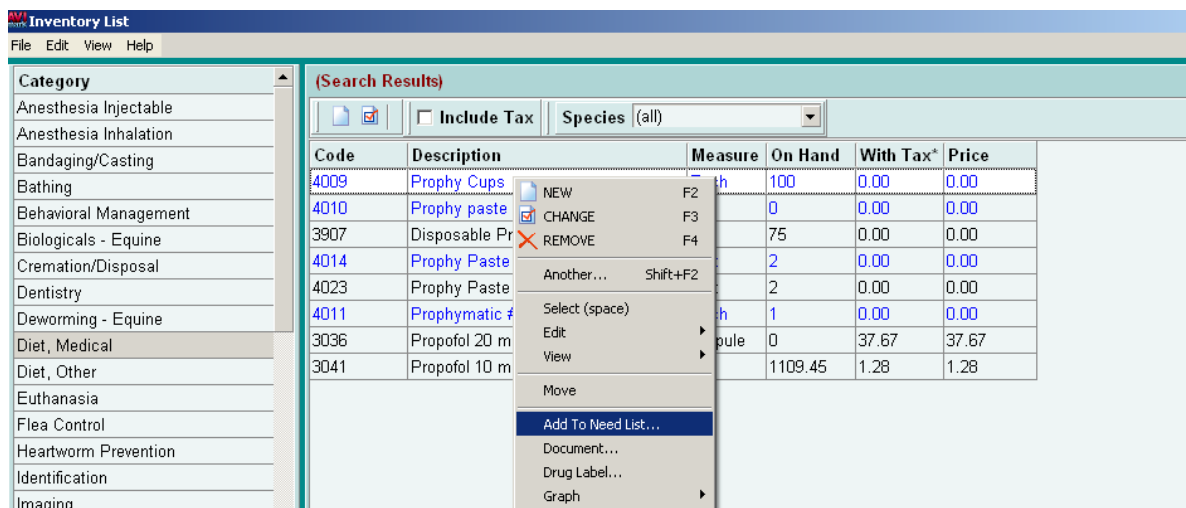
Needs List

Creating a Need List gives your clinic the ability to make lists of items that need to be ordered. There is no limit as to how many Need Lists can be created.

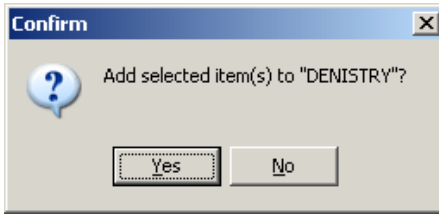
- From the Inventory List select **File, Need List, New** from the menu.
- Enter in the name of the Need List that you are creating then select **Continue**.
- After selecting **Continue** the Need List will open. Select **Done**.

Adding Items to a Need List

- Select **File, Need List, Choose** and select the list you would like to add items to.
- Selecting items to order from the Inventory List to the Need List can be done in two different ways:
 - Highlight the items you would like to order and select **right-click, Add to Need List (F7)**.



- A prompt will follow asking you if you would like to add the item to the Need List. By selecting **Yes** the item will be added to the Need List.



OR

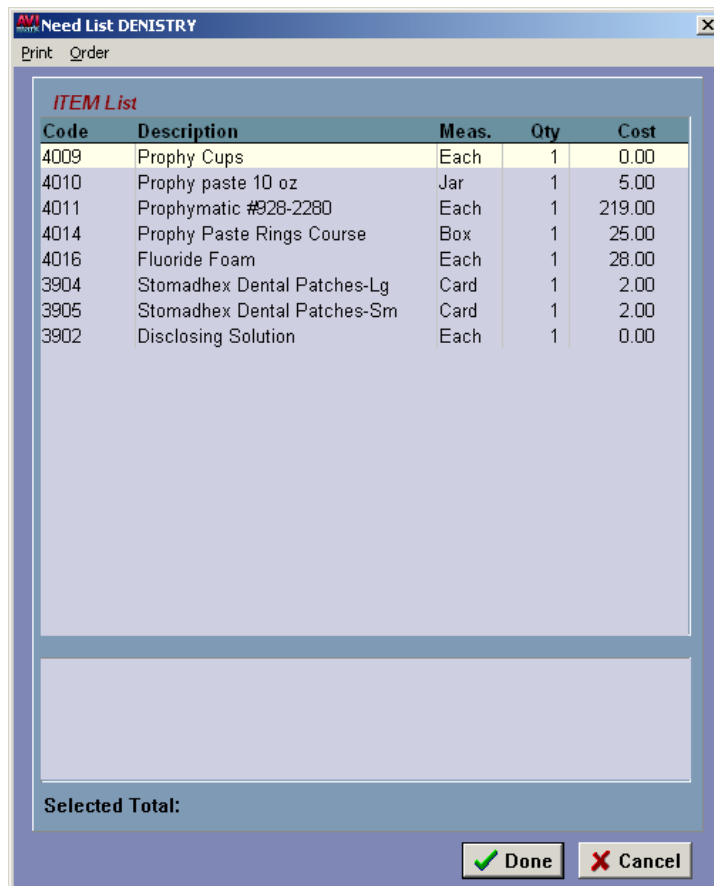
- Select the items you would like to order by using your space bar. After selecting all the items to order, highlight in the Selected Items box and choose **right-click, Add to Need List**.
- Select **Yes** at the prompt to add the items to the Need List.

To assist in distinguishing whether an item in the Inventory List is On Order or currently on a Need List AVImark will display Need List items in GREEN when viewing the inventory window.

Creating Purchase Order from Need List

After the Need List is created, you will be able to create a Purchase Order from the List.

- From the Inventory menu area select **File, Need List, Choose**.
- Select which Need List you would like to work from and select **Continue**.



- To order from the Need List, highlight the items you would like to order and use your **space bar** to select the items. This will put the items you wish to order in the Selected Box at the bottom of the

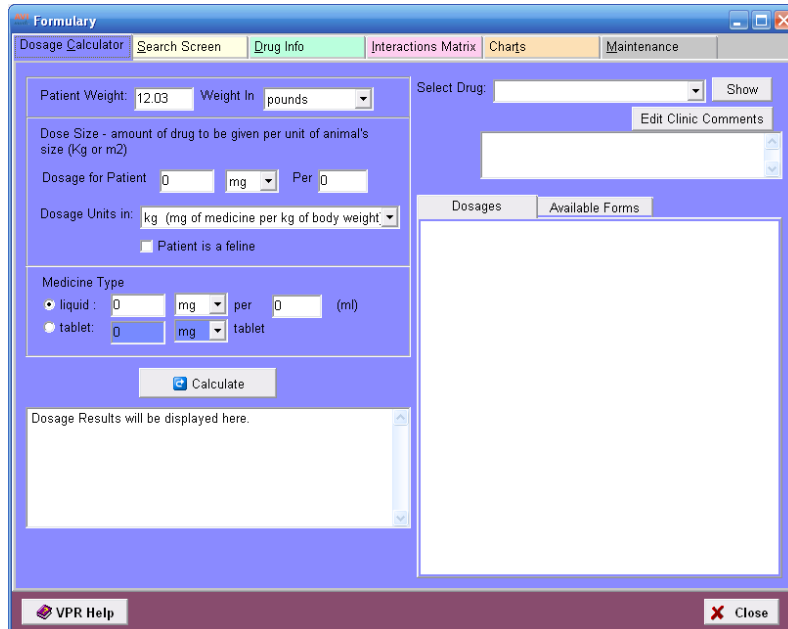
window.

- When all items you wish to order is selected choose **Order, New** from the menu.

This will start the Purchase Order for the items on the Need List. You can then continue with the purchase order as normal. Once the items are received they will be removed from the Needs List.

Work With VPR® Formulary

With the VPR® Formulary you can access drug formulary information and provide drug information sheets to your clients along with their pets prescriptions.



Setup

- After installing the VPR® software specify the path in Advanced Options. From the CID select the **Hammer, Wrench and Screwdriver** speed bar button. In the **Search** field type **VPR®**, select the **VPR® Folder** option and click **Change** to specify the location of the VPR® software.
- In the **Search** field type **active** and under **Veterinary Pharmacy Reference®** select **Active** and set the value to **True**.
- To register the appropriate dll files open the CID, hold down the **Shift + Ctrl** keys, select **Utilities, Register** from the menu and click **VPR®ClassCodeGen.dll**.

Additional VPR® settings can also be defined in the Hospital Advanced Options. Listed are just a couple of the options.

- In the **Search** field type **VPR®** and select the option **Print VPR® Drug Info Sheets when printing Drug Labels**. Setting this option to **True** will print the sheets along with the drug label for an item that has a VPR® code assigned.
- In the **Search** field type **interaction**. Select **Check History for Drug Interactions** to have AVImark search for VPR® associated codes in Medical History; choose **Check History for Drug Interactions at Entry?** to initiate the drug interaction when adding a VPR® treatment or item in Medical History; and choose **Check History for Drug Interactions Days Back** to specify the number of days the Interactions Matrix will search Medical History for drug interactions.

Accessing VPR®

The VPR® Formulary can be easily accessed from different areas within AVImark.

- From the CID select the **Utilities** menu and click **Formulary**.

- In the **Patient** area of the CID from the **right-click** shortcut menu select **Formulary**.
- In the **Medical History** area of the CID from the **right-click** shortcut menu select **Formulary**.
- From the **Medical History Inventory Used** window **right-click** and from the menu select **Formulary**.
- By opening the **Drug Label** window in Medical History access the formulary by selecting the **Formulary** menu option.
- Open the **Inventory List**, select an item and from the **right-click** menu select **Formulary** to access the VPR® Formulary.
- In the **Inventory List** select an item, open the **Change Item** window and click the **Formulary** menu option to access the VPR®.
- In the **Treatment List** select a treatment and from the **right-click** menu click **Formulary**.
- In the **Treatment List** select a treatment and open the **Change Treatment** window. Click the **Associated Treatments/Items** option and under the **Inventory Used** tab highlight an entry and from the **right-click** menu select **Formulary** to access the VPR®.


Assigning VPR® Drug Codes to Items

When assigning a VPR® code to an item this will allow drug formulary information to be automatically displayed when the VPR® Formulary is opened from that item.

- In the Inventory List select the appropriate item and from the **right-click** menu select **Change**.
- Click the **Advanced** tab and from the **Link to VPR®** drop-down list select the drug you wish to associate with this item. Click **OK** once the appropriate drug has been associated.

Using the Formulary

- From Medical History select an item and choose **Formulary** from the **right-click** menu. If this item does not have an associated VPR® code you can select a code from the **Dosage Calculator** tab. AVImark will display a message allowing you to place this VPR® code in the VPR® field of the Change Item window for this item.
- From Medical History select an item that has a VPR® associated code and choose **Formulary** from the **right-click** menu. This will display that drug information but another VPR® code can be chosen from the **Select Drug** drop-down list

	To learn more about: VPR® Formulary	Search the Help for: VPR® Formulary
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Intelligent Inventory

Intelligent Inventory is designed to improve receiving accuracy. Ordering performed outside the AVImark system (Phone, Fax, Internet, etc.). The distributor passes order information they receive to Intelligent Inventory and AVImark retrieves the info and displays it in the system to make it available for receiving into the AVImark Inventory List.

Creating Your Intelligent Inventory Account

Clinics wishing to utilize the Intelligent Inventory integration within AVImark will need to do the following:

- Register for an account at <http://www.intelligentinventory.com> to obtain your Gateway Account ID and credentials for using the site and connecting to the Gateway to retrieve purchase orders.
- You will also need to have your account numbers your accounts with participating distributors.

Important Note: Please be aware of the distinction between your Gateway account ID (the ID that identifies you to Intelligent Inventory) and your distributor account ID (the ID that identifies you to Butler/IVESCO/MVS/ etc).

Setup

- Install the IIGateway Service on the AVImark server:
 - Run the IntelligentInventory.exe self extractor (found in the AVImark folder) to extract the contents into the AVImark folder. This will create an IntelligentInventory subfolder within AVImark containing 12 files.
 - Run the “Run Me.bat” file (found in the IntelligentInventory subfolder) to install the IIGatewaySvc.
- From the Services > Intelligent Inventory menu (on the AVImark CID), run the “Get Inventory Items” utility.
- Enter username/pw/gateway account number credentials provided by Impromed into Intelligent Inventory Configuration found in Services > Intelligent Inventory menu.
- While still in the Configuration window you can edit the distributor information with the proper Distributor Account Numbers (as assigned by your distributor). You can edit existing displayed distributor information by selecting the appropriate line, and using the E button, or add new ones by using the + button.
- Start the IIGateway Service found in Windows Services (Start > Services)
- Set the designated workstation to “set auto process computer” found in AVImark Services > Intelligent Inventory.

Advanced Options

- Auto Process Incoming Purchase Orders – When set to True: This option will allow all Purchase Orders to be imported to the AVImark Inventory Purchase Order list automatically, provided all distributor items contained on that Purchase Order are mapped to an AVImark item.
- Computer GUID to Auto Process Intelligent Inventory POs – This will display the computer GUID for the workstation designated by having run the “Set Auto Process Computer”
- Days Before Next Auto Catalog Update (0=do not auto run) –The number entered here will update the distributor’s inventory automatically at the given day interval, unless the interval is zero.
- Last Catalog Update - Date the last update took place
- Run Purchase Order Monitor

Services Menu on CID

- Get Inventory Items – This option will update the distributor’s inventory. This option performs the manual retrieval of data that occurs automatically when the Catalog Update takes place.
- Review Purchase Orders - Opens the window displaying all available Purchase Orders containing items needing to be mapped to AVImark items and Imported.
- Web Site - Launches the Intelligent Inventory site from within AVImark.
- Set Auto Process Computer - Using this option on an AVImark workstation, will designate that workstation as the computer to be used for processing communications between AVImark and Intelligent Inventory.
- Configure
 - PIMS Account Number
 - Gateway User Name

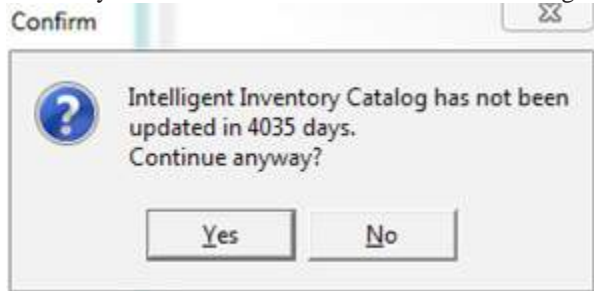
- Gateway Password
- Practice ID – This will be a globally unique, unalterable, identifier that will be automatically generated upon setup.
- Distributor Information

Distr Name	Distr #	Account #
IVESCO, LLC	454586	55555-000
Midwest Veterinary	412812	55555-001
Butler Schein Anim	858446	55555-002

Additions to Inventory List

There are three areas within AVImark where users can cross reference or “map” distributor item codes to existing AVImark item codes.

- Inventory List menu – RX Cross Reference > Intelligent Inventory



The screenshot shows the 'Intelligent Inventory Configuration' window. It contains several input fields: 'Pims Account Number' (240864), 'Gateway User Name' (mcravens), 'Gateway Password' (1234), and 'Practice ID' (AVIMarla). Below these fields is a table with three columns: 'Distr Name', 'Distr #', and 'Account #'. The table lists three distributors: IVESCO, LLC (Distr # 454586, Account # 55555-000), Midwest Veterinary (Distr # 412812, Account # 55555-001), and Butler Schein Anim (Distr # 858446, Account # 55555-002). The 'Distr #' column is highlighted in blue. To the right of the table are three buttons: '+', 'E', and '-'.

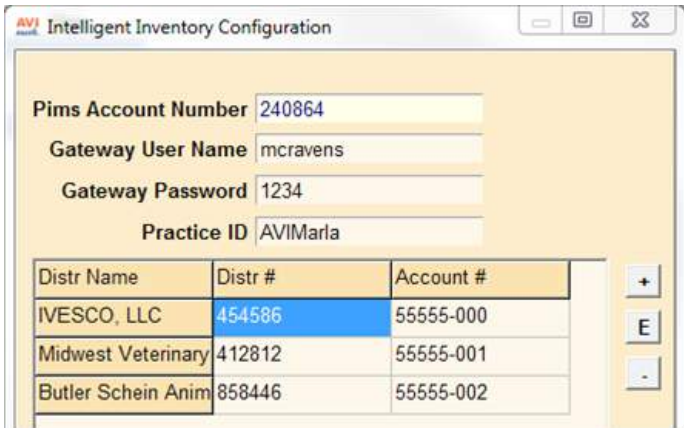
Distr Name	Distr #	Account #
IVESCO, LLC	454586	55555-000
Midwest Veterinary	412812	55555-001
Butler Schein Anim	858446	55555-002

- Directly from the Change Item window

This screenshot is identical to the one above, showing the 'Intelligent Inventory Configuration' window with the same input fields and table. The 'Distr #' column is highlighted in blue, and the 'E' button is visible to the right of the table.

Distr Name	Distr #	Account #
IVESCO, LLC	454586	55555-000
Midwest Veterinary	412812	55555-001
Butler Schein Anim	858446	55555-002

- From the Import Purchase Orders window

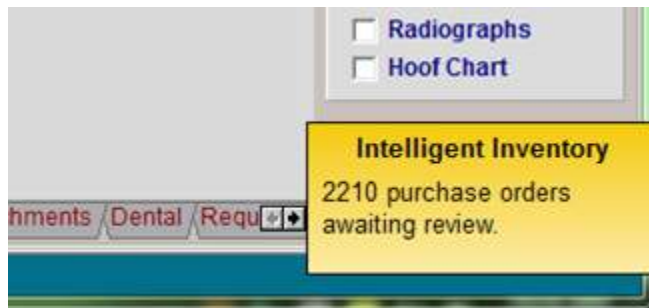


Items displayed in bright yellow indicate the item has not yet been cross referenced with an AVImark item code.

Purchase Orders beginning with N indicate a New Order, and those beginning with U indicate an update to an existing Purchase Order. If you attempt to Import a purchase order with a U prefix and haven't yet released the equivalent N order yet, you will receive this warning: Warning. Could not update this PO. Be sure released PO exists. When you Import the New and corresponding updated order, they will be merged as one order in the AVImark Purchase Order window for receiving.

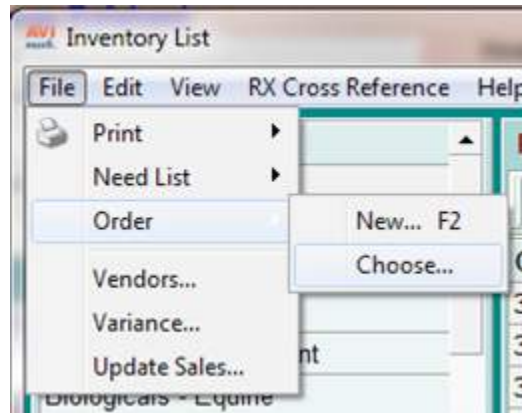
Feature Use

Once your distributor item codes are associated to AVImark item codes, you are ready to begin automatically importing Intelligent Inventory Purchas Orders so you can receive the items into your AVImark Inventory List. Upon opening AVImark on the workstation set as the "Auto Process" computer, users could be prompted with a Catalog items prompt. This workstation will also display an Intelligent Inventory Monitor window in the lower right corner of the screen indicating the number of purchase orders ready for review



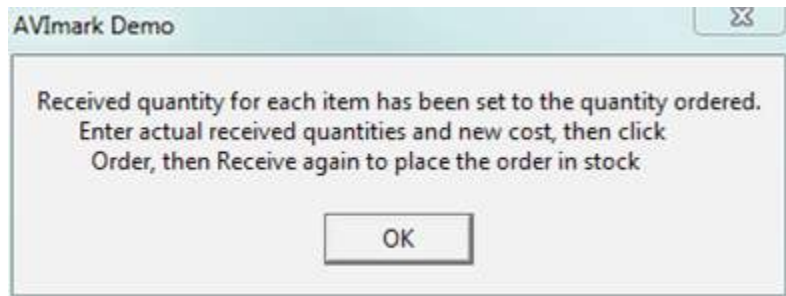
Purchase orders that contain a complete list of AVImark/Intelligent Inventory cross referenced items will be automatically imported to the AVImark Inventory List where they can be received/receipted as a typical AVImark generated purchase order.

- To find this list, open the Inventory List, and select File > Order > Choose.



This will display the list of imported purchase orders.

- To receive the items into your AVImark Inventory List, either right-click > select, or double-left click the appropriate order.
- You should now be in the Purchase Order window displaying the details of the order to be received.
- Select Order > Receive
- You will be presented with the following message:



- Press OK and make any necessary adjustments.
- Select Order > Receive again to complete the receipting process.
- Press Continue at the Purchase Order Receipting window.
- You will now be back to the Purchase Order list window to process any additional purchase orders.

The received items will be updated in the AVImark Inventory to indicate the item was received. These areas include:

- On Hand Qty
- Purchase History
- Last PO
- Average Cost information
- BarCode information
- NDC information

One area that will not be updated is Expiration Date information.

For Intelligent Inventory purchase orders that contain an item or items that have not yet been cross referenced with AVImark items, orders can still be imported and received. To perform this cross reference and import the purchase order select Services > Intelligent Inventory > Review PurchaseOrders.

Once you make your cross reference assignments, you can proceed with Importing your order, and receiving it into your AVImark Inventory List when the order arrives.

CHAPTER 5: CLIENT INFORMATION DISPLAY

The Client Information Display (CID) is the primary working area of the AVImark System. Using this display in conjunction with the related menu items and Speed Bar buttons, you may access every function within AVImark. Each area of the CID is discussed in detail in separate chapters of the manual; therefore, this chapter will cover a brief overview of the different areas.

In this chapter you will learn about...

- » CID Speed Bar Buttons on page 102
- » Client Area on page 102
- » Medical History Area on page 103
- » Medical View Tabs on page 103

The screenshot displays the AVImark Client Information Display (CID) window. At the top, there is a menu bar with 'Clients', 'Work with', 'Applications', 'View', 'Utilities', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is divided into several sections:

- CLIENT: Michael Krueger** (No. 479): Includes fields for Name, Address (#5 Sugar Creek Road), City (Piedmont), State (MO), Zip Code (63957), Phone (573 223-7153), Work (573 223-4030), Title (Mr.), Codes (AQ), Class (01), Balance (-250.00), County (Wayne), Referral (294 (Agnew)), Spouse (Jessica), Cell, Folder (0), and Co. (01). A photo of a dog is visible on the right.
- PATIENT: Alvin** (No. 1493): Includes fields for Name, Birthdate (09-02-08), Age (2y), Sex (M), Breed (Terrier, Parson Russell), Color (Black and White), Weight (22.00 lbs), Species (Canine), and Relation (none). It also lists various vaccinations and tests with dates.
- Medical History**: A table with columns for Date, Time, Dr., Type, Code, Description, Qty, Amount, By, Photo, and Public?. The table lists numerous medical procedures and treatments, including Cystotomy, Tech Fee for Lab Work, Annual Physical Examination, and various vaccinations.
- Attachments**: A list of attachments with checkboxes, including Dental Chart, Form, Inventory Used, Medical Condition, More Stuff, Notes, Photograph, Attachments, Vaccination, Tests, and Radiographs.

At the bottom of the window, there are tabs for 'Alvin', 'Bow', 'Dog', 'Flower', and 'Sydney'. A bottom toolbar contains various view options like 'Chronological', 'Diagnoses', 'Diet', 'Injections', 'Lab', 'Rx', 'Reminder', 'Surger', 'Vaccs', 'X-Ray', 'SOAP', 'Photos', 'Notes', 'Public', 'Problems', and 'Attachment'.

CID Menus

Near the top of the CID, drop-down menus allow you to quickly use primary AVImark functions not directly displayed on the CID. They are:

- Clients menu
- Work with menu
- Applications menu
- View menu
- Utilities menu





- Help menu

Clients Menu

This menu will allow you to:






- Add a **New** client to your files
- **Change** client information
- **Remove** (delete) a client from your files
- **Choose** (select) a client from your files
- **Close** the current client file
- View the patients in a list format by selecting **List Patients**
- **Refresh** all client, accounting, patient and medical history data entered from another workstation
- View a list of patients with reservations or those that are checked in from the **Whiteboard**.
- Access the **Work List** and choose the one associated with this patient or the list you need to work with.
- **Quit** to close AVImark

NEW	F2
CHANGE	F3
REMOVE	F4
 Choose	Esc
Close	Ctrl+F2
List patients	
Refresh	F11
 Whiteboard...	Alt+F10
Work List...	Ctrl+Alt+F10
Quit	Alt+F4

Work With Menu

This menu will allow you to use various primary AVImark functions, including:

- Appointments
- Boarding Calendar
- Care Credit
- Diagnosis List
- Estimates
- Follow-up List
- Glossary
- Hospital Setup
- Inventory
- Information Search
- Practice Analysis
- Problem List
- Q & A
- Reminders
- Reports
- Statements
- System Tables
- Treatments
- Users and Security

 Appointments	F9
 Boarding Calendar	Shift+F9
 Care Credit	
D_x Diagnosis List	
Estimate	
Follow-up List	
Glossary	
Hospital Setup	
 Information Search	
R_x Inventory List	
Practice Analysis	
Problem List	
Q & A	
Reminders	
Requisition Management	
 Reports	
Statements	
System Tables	
T_x Treatment List	
Users and Security	

Applications Menu

You may use this menu to open other application programs on your computer such as MS Word and MS Excel. Other applications listed here will be those which you have specified in **Hospital Setup, System, Applications**. This menu also includes several auxiliary programs included with the AVImark program. Prior to using any of the auxiliary programs in the Applications menu, we recommend you contact AVImark Technical Support Staff.

MS Word
Excel
AVImark Website
Clinic Website
MrgQuery

Utilities Menu


The utilities menu is used to:

- Log on as a user
- Access the user time card
- Print the time card report
- Back up AVImark files
- MS-DOS prompt
- Set or change the posting date
- Printers set up
- Rebuild index
- Access built in Utility programs
- Update AVImark
- Cash Drawer
- Sidekick
- QuickBooks
- Restore from backup
- Run Instrument Import

LOG ON	F12
Time Card	
Time Card Report	
BACK UP AVImark files	
MS DOS Prompt	
Posting Date	
Printer Setup	
Rebuild Index	
Utilities...	
Update AVImark	
Cash Drawer	Ctrl+F11
Sidekick	
QuickBooks	
Switch to MCR	Alt+M
RESTORE from backup	
Run Instrument Import	

Help Menu

You may use the Help menu to learn how to use the AVImark On-line Help function and to view the Q&A Maintenance window. The Help Menu also has an option for Tech Notes. This option will display a list of categorized topics that when selected will display a list of frequently asked questions pertaining to the topic.

	To learn more about: CID menus	Search the Help for: CID menu
---	--	---

CID Speed Bar Buttons

The Speed Bar buttons provides quick access which allows you to perform other AVImark primary functions related to the current working client and patient. These buttons consist of the following:



- Client selection
- Add notes
- Add records
- Appointment calendar
- Boarding calendar
- Whiteboard
- Client account
- Post charges
- Patient chart
- Reports
- Treatment list
- Inventory list
- Diagnosis list
- Information search
- Calculator
- Microsoft auto-dialer
- Census notes
- Advanced Options
- Diagnostic Imaging Atlas

	To learn more about: CID speed bar button	Search the Help for: Speed buttons
--	---	--

Client Area

The client area of the CID displays information about the current working client. In the client area window, there are several things you can do from the shortcut menu. Use the **right-click** option in the Client area window to see the shortcut menu.

CLIENT: Michael Krueger						No. 479	
Name	Krueger	First	Michael	Title	Mr.	Added	08/01/07
Address	#5 Sugar Creek Road	Phone	573 223-7153	Codes	AQ	E-mail	
		Work	573 223-4030	Class	01	Fax no.	573 223-4036
City	Piedmont	State	MO	Zip Code	63957	Balance	0.00
Referral	294 (Agnew)	Spouse	Jessica	Cell		County	Wayne
		Folder	0	Co.	01		

Patient Area

The Patient area of the CID displays information about the current working patient belonging to the client you have selected. Other patients belonging to the client are listed as Name tabs located at the bottom of the CID in alphabetical order. In the Patient area window, there are several things you can do from the shortcut menu. Use the **right-click** option in the Patient area window to see the shortcut menu.

PATIENT: Alvin						No. 1493	
Name	Alvin	Codes		Sex	M	Added	09-05-08
Birthdate	09-02-08	Age	2y	Rabies	62691	Reminded	11-11-10
Breed	Terrier, Parson Russell	Plan	(none)	Deceased	11-10-10	417	Lyme Disease Vaccination 01-04-11
Color	Black and White	Weight	22.00 in lbs	Microchip	123*345*3453	406L	Canine DA2PP-L Vaccination 03-30-11
Species	Canine	Allergy	(none)	Relation	(none)	844	Heartworm Test 10-19-11
						815	Fecal Examination, Flotation 10-19-11

Reminders / Follow-ups / Treatment Plans / Ownership

Medical History Area

The Medical History area of the CID displays the Medical History entries for the selected patient. In the Medical History Area window, there are several things you can do from the shortcut menu. Click the right mouse button (called **right-click**) in the Medical History Area window to display the shortcut menu. For a detailed discussion on the Medical History area, refer to “CHAPTER 8: ENTERING MEDICAL HISTORY”.

Medical History											Attachments
Date	Time	Dr.	Type	Code	Description	Qty	Amount	By	Photo	Public?	
03-16-11	12:53p	DNS	S (i)	617	Cystotomy	1	269.50			Yes	<input type="checkbox"/> Appointment(s)
03-16-11	12:52p	DNS	S (j)	100	Tech Fee for Lab Work	1	5.00			Yes	<input checked="" type="checkbox"/> Boarding
03-16-11	12:41p	DNS	S (m)	202	Annual Physical Examination	1	40.00			Yes	<input type="checkbox"/> More Stuff
03-16-11	10:18a	DNS	N	INST\$	Invoice instructions for Alvin	1	0.00			Yes	<input checked="" type="checkbox"/> Notes
03-10-11	10:37a	JAK	S	920	Antech (4444) Pre-op Profile	1	52.50	JAK		Yes	<input checked="" type="checkbox"/> Photograph
03-10-11	10:37a	JAK	S	709	Cardiopulmonary Monitor	1	24.50	JAK		Yes	<input type="checkbox"/> Schedule
03-10-11	10:37a	JAK	S	159	DECLINED: Canine Dental Prophylaxis, Gr	1	35.00	JAK		Yes	<input type="checkbox"/> Attachments
03-10-11	10:37a	JAK	S	167	Dental Fluoride Treatment	1	7.60	JAK		Yes	
03-10-11	10:37a	JAK	I	3041	Propofol 10 mg/mL	20	25.60	JAK		Yes	
03-10-11	10:37a	JAK	S	142	Catheterization, Intravenous	1	32.50	JAK		Yes	
03-10-11	10:37a	JAK	I	1063	Lactated Ringers 1L	0.30	8.66	JAK		Yes	
03-10-11	10:37a	JAK	I	1060	IV Extension Set	1	4.68	JAK		Yes	
03-10-11	10:37a	JAK	S	106	Anesthesia, Iso Maintenance (15 min)	1	46.00	JAK		Yes	
03-10-11	10:37a	JAK	I	3006	Butorphanol 10 mg/mL	0.08	1.12	JAK		Yes	
03-10-11	10:37a	JAK	S	107	Anesthesia, Iso Maint/minute	15	30.00	JAK		Yes	
03-10-11	10:37a	JAK	I	3715	Glycopyrrolate 0.2 mg/mL	0.38	0.57	JAK		Yes	
03-07-11	11:27a	DNS	S	331	Boarding, Canine 0-25 lbs.	0	0.00	JAK		Yes	
03-07-11	11:26a	DNS	S	50003	IV Tranquilizer	1	43.00	JAK		Yes	
03-07-11	11:25a	DNS	S (i)	617	Cystotomy	1	269.50	JAK		Yes	
03-07-11	11:21a	DNS	V (m)		Patient check-in			JAK		Yes	
02-14-11	4:01p	JAK	S	727	Nail Trim	1	12.10			Yes	
02-14-11	4:01p	JAK	S	104	Anesthesia, Local	1	24.50			Yes	
01-12-11	2:35p	DNS	X	4507	Frontline Topspot to 22 lbs	1	11.70			Yes	
01-12-11	2:35p	DNS	S	306	Bath, Canine Short Hair 21-36lbs	1	27.00			Yes	
01-12-11	2:32p	DNS	D	ZD6374	DERMATITIS, FLEA ALLERGY	1	0.00			Yes	
01-12-11	2:32p	DNS	S	210	Examination/Consultation	1	40.00			Yes	

Medical View Tabs

At the bottom of the Medical History area displays several Medical View tabs which allow you to view the patient’s Medical History sorted (limited) in different ways.



If you can not see all of the displayed Medical View Tabs, use the scroll arrows at the right side of the Medical View Tab area to open other tabs.

	<p>To learn more about: Medical view tabs</p>	<p>Search the Help for: Medical view tabs</p>
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CHAPTER 6: CLIENT AREA

When viewing the Client Area of the CID (Client Information Display), the current working client is displayed along with the patient belonging to the client that was treated last.

In this chapter you will learn about...

- | | |
|--|--|
| » Open a Client's File on page 105 | » Making Change on page 116 |
| » Use the Client Selection Window on page 105 | » View/Print the Client's Accounting on page 117 |
| » Change Client Information on page 106 | » Add Notes to Accounting on page 118 |
| » Close a Client's File on page 106 | » Age the Client's Account on page 118 |
| » Add a New Client to Your Files on page 106 | » View Client Stats on page 118 |
| » Scrolling through Client Files on page 112 | » Work with a Closed Invoice on page 118 |
| » Delete a Client from Your Files on page 112 | » View and Change an Open Invoice on page 118 |
| » View or Add Notes about the Client on page 112 | » Create a Pre-Invoice on page 119 |
| » Add Client Alerts on page 112 | » Undelete Accounting on page 119 |
| » Add File Attachments on page 113 | » View an Accounting Entry History on page 120 |
| » Enter Special Invoice Instructions on page 114 | » Return a Check and Add a Fee on page 120 |
| » Attach Client Photos on page 114 | » Dial the Client's Phone Number on page 120 |
| » E-mailing Clients on page 115 | » Print Client Labels on page 120 |
| » Handle Over-the-Counter Sales on page 116 | » Reprint an A/R Statement on page 120 |
| » Enter a POA (Payment on Account) on page 116 | |

Open a Client's File

With any client's information display window open, you may **Select** (open) up to nine other client's files at the same time. If the client you are looking for is someone you have been working with recently (i.e. one of 10 recently worked with) their name will be displayed just below the Client area as a Name Tab.

CLIENT: Jessie Henderson				No. 43
Name	Henderson	First	Jessie	Title
Address	8834 Hwy CC	Phone	573 555-8746	Codes
		Work	573-555-1193	Class
City	Piedmont	State	MO	Zip Code
			63957	Balance
Referral		Spouse		Folder
				9
				Co. 01
Henderson, J / L'Heureux, C / Smite, M				

- Select the correct name tab to reopen a client's file.

Use the Client Selection Window

The Client Selection Window allows you to search for a client by typing part of, or the entire client name, phone number, patient name, rabies tag number, etc.

- On the CID, open the **Clients** menu. Click **Choose**.
- Click on the magnifying glass speed bar button.
- Press the **Esc** key.



Display all clients within AVImark

- On the CID, open the **Clients** menu. Click **Choose**.
- On the Client Selection window click **Show**.
- To search for only active clients uncheck the **Include Active** option. The advanced option, **Default: Include Inactive During Client Selection** will allow you to have AVImark default to having this option checked or unchecked.

Locate clients and patients

- Place the cursor in the correct field and type either all or part of the client's name, account number,

folder number, phone number, work number or the cell phone number and click **Continue**.

- Select the correct name and click **Continue** to display the CID for that client.

Displaying clients and patients by partial names

- In the **Client** field, type a partial last name, a comma and a partial patient's name. Everything to the right of the comma will be moved to the Patient field.
- Click **Continue** and all clients and patients matching the criteria will be displayed.
- Select the correct name and click **Continue** to display the CID for that client.

Locate by rabies tag number, Patient Tattoo or microchip number, or Record Number

Client Name	Spouse	Address	Phone
-------------	--------	---------	-------

- In the **Tag no.** field, enter the patient's rabies tag number, and click **Continue**.
- In the **Patient ID** field, enter the patient's tattoo or microchip number and click **Continue**.
- Use the **Patient Record Number** field to enter the patient's associated test result import number assigned by an AVImark integration partner. This number can be obtained and displayed on the patient's CID by setting the Advanced Option, Display Patient Record Number, to True.
- Select the correct name and click **Continue** to display the CID for that client.

Change Client Information

With a client's file displayed, you may change any of the information by opening the Change Client window.

- In the client area, **right-click** and from the shortcut menu click **Change**.

Close a Client's File

- In the Client area, **right-click** and from the shortcut menu click **Close**.

Add a New Client to Your Files

You may enter as many clients and patients to your files as you wish. There is no limit to the number of client

records in AVImark.

- In the Client area, **right-click** and from the shortcut menu click **New** to display the New Client Information window.
- Enter the information about the new client. When all information has been entered, click **Done**.

Last

This field is the client’s last name only.

First

If the client is a business or institution, type the name of the company and use the first name field to show the contact person’s name. You will not want AVImark to print the first name (contact person) on invoices or statements. Ensure you include a Client Code **B** in the codes field for this client.

Title

This field indicates the title for the client, for example; Mr. and Mrs. If the client is a business leave this field blank.

Address

This field is the client’s street address. You may also enter a second address line by typing in the blank field just below the address field.

Zip

The zip/postal code field will be filled in automatically by AVImark as the default value which you have specified in **Hospital Setup, Demographics**. To choose a zip code, click in this field and select the appropriate zip code from the displayed drop-down list.

When a client zip code is changed on the CID the client area code is also changed due to the area code linked to

that specific zip in System Tables, Zip Code table. There is an Advanced Option named “Automatically Update Client’s Area Code Based on Zip Code” that can be set to True or False. Upon updating the default setting is True to keep the original functionality in place, but users that do not want the client area code to be updated to match the zip code table can set this option to False.

Phone

This field is the client’s Area Code and phone number. If the number you type is identical to that of another client, AVImark will warn you.

Fax no

If applicable, this field indicates the client’s fax number to include the area code.

City

When you choose a zip code or a city, the associated city name will automatically be entered in this field.

State

When you choose a zip code or a city, the associated state will automatically be entered in this field.

Work

This field is the client’s business phone number including the Area code.

Cell

This field indicates the client’s cell phone number when applicable.

County

AVImark has the ability to select a special Rabies Certificate document for that particular county, based on information you provide in the County System Table.

E-mail

This field displays the client’s e-mail address.

Preferred Contact Method

This field contains a drop down menu list of insurance contact methods to select as preferred method for this client.

History Zip

Entering a zip code in this field will force AVImark to charge the client the appropriate tax rate for this area, for treatments and/or items entered into Medical History.

SSN

This field will contain question marks as security in allowing the clients SSN to be hidden from view. Clicking in this field will display the client’s SSN if one has been entered.

D/L no.

This field displays the client’s driver’s license number when applicable.

Photo

Click the search button to locate a client photo. From the Image Editor window save the picture to the client’s folder to have it appear on the CID screen.

Employer

This field displays the client’s employer when applicable.

Spouse

This field indicates the full name of the client’s co-owner. AVImark allows several drop-down options for the title of the other contact in the Client Area. These choices include Spouse, Significant Other, Relative, Friend and Other. When a name has been entered in this field, in conjunction with the Q Action Code, you may search for a client based on the spouse’s name rather than the last name.

Preferred doctor

You may identify a preferred doctor which will be automatically chosen as the attending doctor when you access the client’s file.

Reference

AVImark allows you to identify a referral source for newly added clients and is able to send correspondence of your choice to any AVImark client who has referred a new client during a specified period of time.

Referral source is NOT one of the clients within AVImark

- In the **Referral** field, type the name of the person, advertisement, promotional, etc., or use the drop down menu to select the referral choice.

Referral source IS one of the clients within AVImark

- In the **Referral** field click the search button to display the Client Selection window.
- Find the appropriate client and click Continue to have the clients account number and last name displayed in the Reference field.

Client Business Referral Field

This field will display the referral selections listed in the Referral Selections Table in System Tables. If the advanced option “Selected Referral Required” is set to False you can type anything in the Client or Business Referral field and if it is set to True you can only select from the drop-down menu.

- The Advanced Option of “Referral Required to Complete Client Information” can be set to True and when adding a new client you will be required to select a referral source and the message “You Must Add a Referral” will be displayed before completing the new client setup.
- If you wish to have users select a referral source from the drop-down list and not manually type in a source set the Advanced Option of “Selected Referral Required” to True and they will be required to choose a source from the Referral Selections list.

Added

This field displays the added date of the client. AVImark will enter this information for you. To change information in this field press the Tab key or double-click on it and enter or choose the desired date.

Added By

AVImark will automatically enter the initials of the person currently logged in. If no one is currently logged in, the field will remain blank. You may also use this field to indicate who made changes to the client’s information.

Codes

This field contains the Client Code(s) that are appropriate for this client. The default value of **A** indicates a normal **Active** client. You may specify up to 8 codes. The table listed below identifies the different Client Codes, the meaning and a description.

The following table lists each Action Code and its meaning:

CODE	NAME	EXPLANATION
A	Active client	Normal, active client

B	Client is a business	A client with this Client Code is considered a business or institution. Documents for this client will be printed as such.
C	Credit is pre-approved	A client having this Client Code will be “Pre-Approved” for credit to be extended and a message will be displayed to this effect on the CID.
E	Tax exempt	A client having this Client Code will be exempt from being charged sales tax.
F	No billing fee	A client having this code will not be charged a handling fee on statements.
G	Always print reminders	When printing reminder cards or letters, clients having this code will only receive a printed reminder document even though they have a valid e-mail address.
H	Don't print balance due on invoice	Don't print the client's balance due amount on the invoice.
I	Inactive client	A client having this Client Code is considered no longer active). This client's transactions will not appear on the A/R Summary Report, will not receive statements and any animals belonging to the client will not be reminded for vaccinations, exams or inventory items.
L	Exempt from local tax	A client having this Client Code will be exempt from local tax.
M	Supress messages from statement	An A/R statement printed for a client having this Client Code will include a message as though the client were “Current” on their account, no matter how overdue the client is.
P	Organize statement by patient	AVImark allows you to indicate that a particular client's statement is to be organized by patient, rather than by invoice.
Q	Spouse field is last name of significant other	Use this Action Code to cause AVImark to search for a client based on the client's spouse's name rather than last name.
S	Supress printing of statements	This client will receive no A/R statements.
T	Exempt from state tax	A client having this code will be exempt from state tax.
W	Waive late charges	A client having this Client Code will be waived from being charged any service charge no matter how delinquent the account balance.
X	Cash only client (bad debt)	AVImark will automatically create an alert for clients with this code, identifying they are a bad debt client.
Z	Prevent this client from being purged	When trying to remove a client record having this Client Code a warning message will appear and an audible alert will sound. If using the Purge, Utilities option this client will not be purged.
*	Summary format statement	Prints an abbreviated form of the statement (Top Sheet).

Suspend Reminders

You may temporarily suspend reminders for all patients belonging to this client by checking this option.

Folder

You may identify a folder number where you keep hard copies of medical records and patient charts for this client's patients. AVImark will warn you if the folder number you have assigned has currently been used by another client.

CO.

AVImark lets you specify Client Company Numbers in the event you have more than one business concern and thereby wish to separate your billing and reports accordingly. The default value will be set to whatever value has been specified in Hospital Setup. This value is normally set to **01**. Only one company number may be assigned to any given client.

Contract Price

From this drop down list select a contract price code. These contract price groups are set up in System Tables.

Suspend Until

You may temporarily suspend reminders for all patients belonging to the client until a certain date by clicking on the drop down arrow and choosing a date.

Class

If applicable choose the Discount Class Name appropriate for this client.

Statement Site

This field is only visible on systems having multiple sites set up. It allows you to specify which site the client last visited and will aid in printing statements for each site.

Quality

This field contains the client rating value assigned by AVImark when using Monitor Client Quality. The quality value for a client can also be set manually by entering a number from one to ten, with ten being the highest rating. To always maintain the value specified in the Rating field check the **Set** option.

Scrolling through Client Files

You may move quickly from client to client either alphabetically or numerically by Client Account Number.

Alphabetically

Using the keyboard, press and hold the **CTRL** key and use the **Arrow Down** to move down and **Arrow Up** to move up through the alphabet, beginning from the current client you are on.

Numerically by account number

Using the keyboard, press and hold the **CTRL** key and use the **Page Down** to move down and **Page Up** to move up through the client list numerically.

Delete a Client from Your Files

- From the Client area, **right-click** and from the shortcut menu click **Remove**.
- You will need to click **Yes** to confirm the deletion.

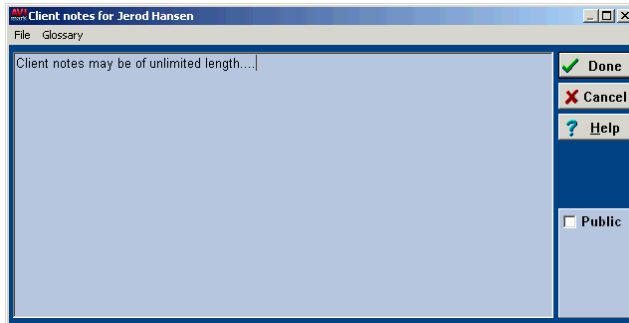


If a client is accidentally deleted from your files, contact AVImark Support Staff at 877-VET-WARE (877-838-9273). We will assist in retrieving the information if at all possible.

View or Add Notes about the Client

AVImark allows you to create unlimited notes or memos about the client. You may also import text files (files with an extension of .txt) and/or copy and paste note templates from the Note Glossary into any AVImark note window. For detailed information on adding, importing and creating note templates, refer to “*CHAPTER 30: NOTE GLOSSARY AND Q & A*”.

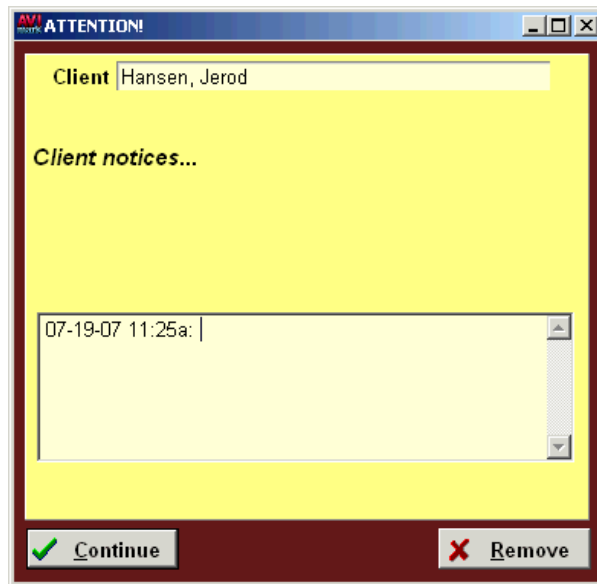
- In the Client area, **right-click** and from the shortcut menu click **Notes**.



Add Client Alerts

You may choose to have an alert message window appear when you first open a client's file to warn you about anything you decide to type in the window.

- In the Client area, **right-click** and from the shortcut menu click **Alert**.
- Type your message and click **Continue**.

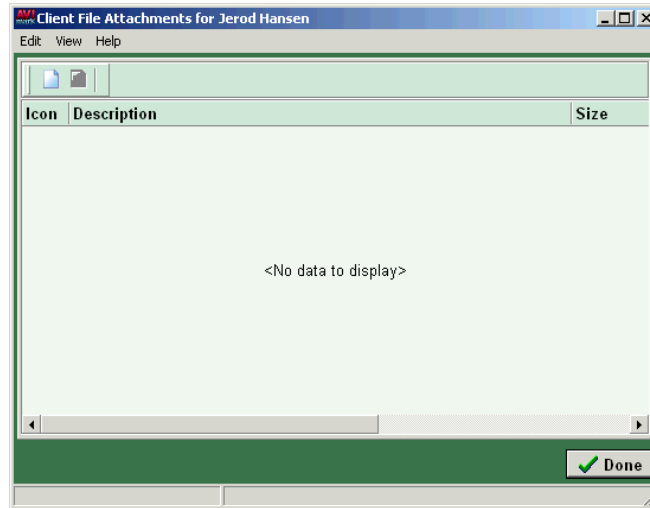


- To remove an alert, click **Remove**. You will need to click **Yes** to confirm.

Add File Attachments

AVImark gives you the option of attaching multiple files to clients, such as documents, images, Excel files, and so on.

- From the Client area, **right-click** and from the shortcut menu click **File Attachments** to display the Client File Attachments window.
- Within the File Attachment window, **right-click** and from the shortcut menu click **New**.
- Use the browse option at the end of the Filename field to search for the file you would like to attach.



- Select the file name you would like to attach and then click **OK**.
- After all necessary files have been selected click **Done**.

View as Gallery

AVImark allows you to view photos when multiple photos are attached to the client.

- Open the **View** menu and click **View as Gallery**.

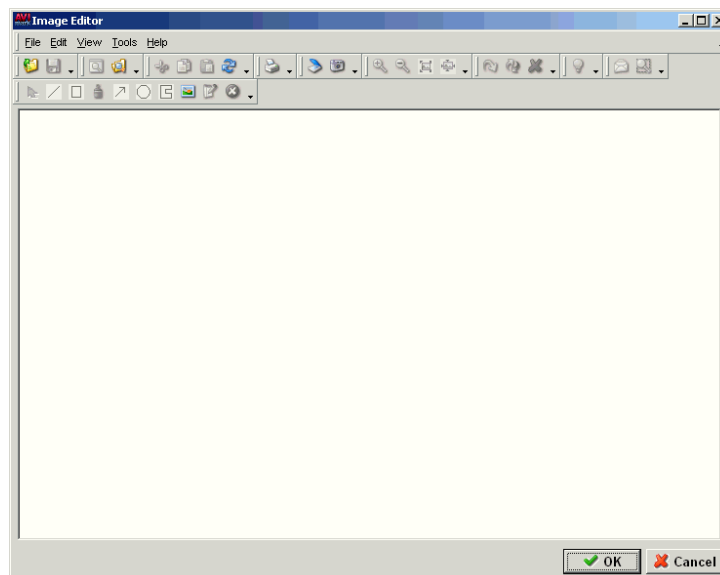
Add Notes

Notes can be added to any file.

- the correct file selected **right-click** and from the shortcut menu click **Notes**.
- Type the notes pertaining to the file and click **Done**.

Preview Notes Attached to the File

- Open the **View** menu and then click **Preview Text**.
- Select the **Show Preview Text** option and select the **Notes**.



- Select **OK**.

Enter Special Invoice Instructions

AVImark will print any miscellaneous memos or instructions on the invoice.

- In the Client area, **right-click** and from the shortcut menu click **Instructions**.
- Type the instructions for the client and click **Done**.

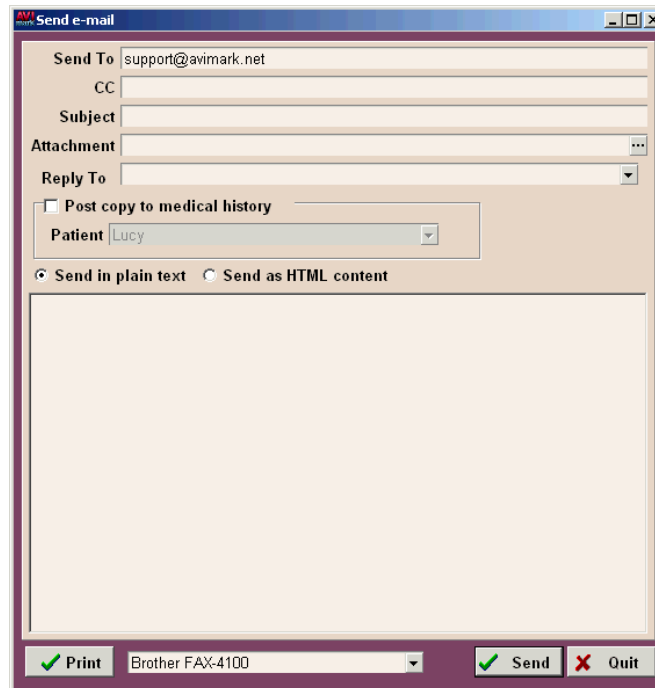
Attach Client Photos

AVImark allows you to link photos (jpg, bmp, tif or DICOM format) to the Client area of the CID. These images will be saved in the \PHOTOS directory on your server.

- In the Client area, **right-click** and from the shortcut menu click **Photo** to display the AVImark Image Editor.
- In the AVImark Image Editor, open the **File** menu and click **Open** to display the Open window.
- Select the correct image name and click **Open** to display the image in the AVImark Image Editor.
- Click **OK** to display the image in the Attachments of the Client area.

Copy photos from a camera assigned directory

- From the client area, **right-click** and from the shortcut menu click **Photo**.
- In the AVImark Image Editor, open the **File** menu and click **Get Image**.
If your camera is not listed select File, Open from the menu and choose the appropriate drive where the camera is installed.
- Locate the appropriate image.
- Double-click the image name or single click once and click **Ok**.



- In the AVImark Image Editor, open the **File** menu and click **Save as**.
- With the correct file name in the **File name** field, click **Save**.

- Click **Ok** to save the image.

E-mailing Clients

AVImark allows you the ability to email photos, reminders, attachments, etc. directly from within the program. A client's valid e-mail address must be entered into the E-mail field in order to e-mail information.

- You may send an e-mail message to the client by choosing **right-click, Send e-mail**. The Send e-mail window will open with the client's email address specified.
- Enter an e-mail address you would like to send a carbon copy to within the **CC** field.
- Enter the subject in the **Subject** field.
- Within the **Attachment** field click on the browse button and search for the document, image, etc. and double-left click to attach.
- The **Reply To** field allows you to select a different e-mail address that the reply e-mails will be sent to. Use the drop down to select a specific user's e-mail address entered in User's and Security.
- Select the **Post copy to medical history** option will post a copy of the e-mail to the selected patient's medical history.
- Select if you would like to send the e-mail in plain text or HTML content.
- Enter the body text within the text area of the e-mail window.
- Make sure you are on a computer that has your internet connection established before attempting e-mail. Click **Send** to begin sending the message.

Handle Over-the-Counter Sales

Situations may arise where you may need to handle a *walk-in* over-the-counter sale for which there is no specific patient involved.

- Add a new client to your files named something similar to **February 2009 OTC**. Create a client file such as this for each month of the year.
- In the Client area, **right-click** and from the shortcut menu click **Invoice**.
- In the Invoice window, **right-click** and from the shortcut menu click **Choose** to display the Inventory List.
- Select the item(s) being sold to the client from the Inventory list and click **Done**.
- In the Invoice window, **right-click** to display the shortcut menu. Point to **New** and select the appropriate payment type.
- Click **Done** on the **Enter Payment** window.
- Click **Print** to print the invoice.

Enter a POA (Payment on Account)

AVImark allows you to accept a payment from a client on their outstanding balance.

Print an Invoice showing the POA

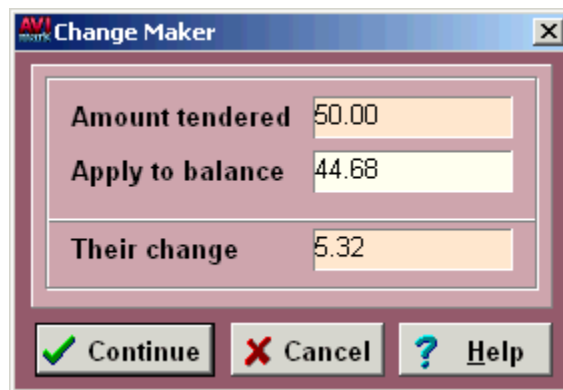
- In the client area, **right-click** and from the shortcut menu click **Invoice**.
- In the Invoice window, **right-click** to display the shortcut menu. Point to **New** and select the appropriate payment type.
- Click **Done** on the **Enter Payment** window.
- Click **Print** to print the invoice.

Invoice not needed when taking a POA

- In the client area, **right-click** and from the shortcut menu click **Account** to display the Accounting window.
- In Accounting window, **right-click** and from the shortcut menu click **New** to display the **New Transaction** window.
- Use the **Type** drop-down list and select the correct payment type.
- Using the **Amount** field, enter the payment amount and click **Done**.
- You will need to click either **Yes** or **No** at the **Confirm** prompt.
- Click **Done** on the Accounting window.

Making Change

If the payment is by cash or for some other reason the customer makes a payment greater than the amount owed, a **Change Maker** window opens. The **Apply to balance** amount will be set to the client's balance due. The difference between the **Amount tendered** and the **Apply to balance** will be shown in **Their change** field.



Amount tendered	50.00
Apply to balance	44.68
Their change	5.32

Continue Cancel Help

- Click **Continue** on the **Change Maker** and the change will be entered into Accounting as a Cash Refund.
- Click **Cancel** on the **Change Maker** and the difference will be applied to the account for future charges.

View/Print the Client's Accounting

The client's Accounting window shows all invoices as well as miscellaneous account adjustments, payments on the account, etc.

Date	Patient	Code	Description	Tax	Amount	Balance
07-19-07			Invoice #20794	0.00	64.50	0.00
07-19-07			Cash payment		-64.50	
07-19-07	Duke	80	Rabies 1yr Canine Combo, #5264:1	1	11.00	
07-19-07	Duke	EXAM	Annual Health Exam	1	30.00	
07-19-07	Duke	BORDVC	Canine Bordetella Vaccine	1	23.50	
06-21-07			Invoice #20789	31.60	513.00	0.00
06-21-07		DLM	Visa payment		-544.60	
06-21-07	Duke	653	Hospital To Observe	8	160.00	
06-21-07	Duke	917	Parvo Antigen Test(stool)5615	1	43.00	
06-21-07	Duke	922	Cite Allergy Test	1	63.00	
06-21-07	Duke	918	Needle Aspirate Biopsy & Exam	1	30.00	
06-21-07	Duke	924	K9 Comprehensive Plus 20	1	65.00	
06-21-07	Duke	804	Pneumocystogram	1	95.00	
06-21-07	Duke	926	Zz Thyroid Scan 45	1	57.00	
02-25-05			Invoice #20734	0.00	45.00	0.00
02-25-05			Cash payment		-45.00	
02-25-05	Duke	8851	Bath & Flea Dip	1	45.00	
02-25-05			Invoice #20733	3.94	32.17	0.00

- In the Client area, **right-click** and from the shortcut menu click **Account** to display the Accounting window.
- Open the **Print** menu and click **History** to display the Print Account History window.

- Using the **Print To** drop down list, select the correct the printer.
- Specify the number of months of accounting history in the **Months shown** field, or use the **or since** and **through** drop down calendar and select the period to print for.
- Using the Sort by date field, select how you wish to sort.
- If appropriate, select **Print Signatures**.
- To view the report on screen, select **Preview** and click **Print**.

Add Notes to Accounting

AVImark allows notes to be entered for any Accounting Transaction record. Though still accessible as a selection in the payment type menu, Notation type is no longer necessary and should not be used.

- In the Client’s Account window, **right-click** and from the shortcut menu click **Notes** to display the Account Transaction Notes window.

- Type the notes pertaining to the entry and click **Done**.

Age the Client's Account

This feature will display the correct information in the fields at the top right corner of the Client Account window.

- In the Client's Account window, click **Age account**.

View Client Stats

Allows you to view year-to-date and last-year payment sales figures for the client:

- In the Client's Account window, click **Client stats**.

Work with a Closed Invoice

AVImark will not allow you to make changes to an invoice that has been closed with the exception of changing the amount of the charges and/or the description.

View and Change an Open Invoice

You may view and/or change the contents of an "open" invoice in the client's Accounting window. You may do this in either "Summary" or the "Detailed" view.

- In the Client's Account window, **right-click** and from the shortcut menu click **Invoice** to display the Open Invoice.
- To change a transaction on the Open Invoice, select the correct entry.
- **Right-click** and from the shortcut menu click **Change** to display the Change Transaction window.
- Enter the appropriate change(s) and click **Done**.

Transfer an Invoice

AVImark will let you transfer the amount of an invoice (as an Account Adjustment) to another client's accounting records.

- In the Client's Account window, select the correct invoice.
- **Right-click** and from the shortcut menu click **Transfer** to display the Transfer window.
- In the **Transfer to** field, type the account number of the client you wish to transfer the invoice amount to.
- You will need to click **Yes** to confirm the Transfer.
- Click **Done**.

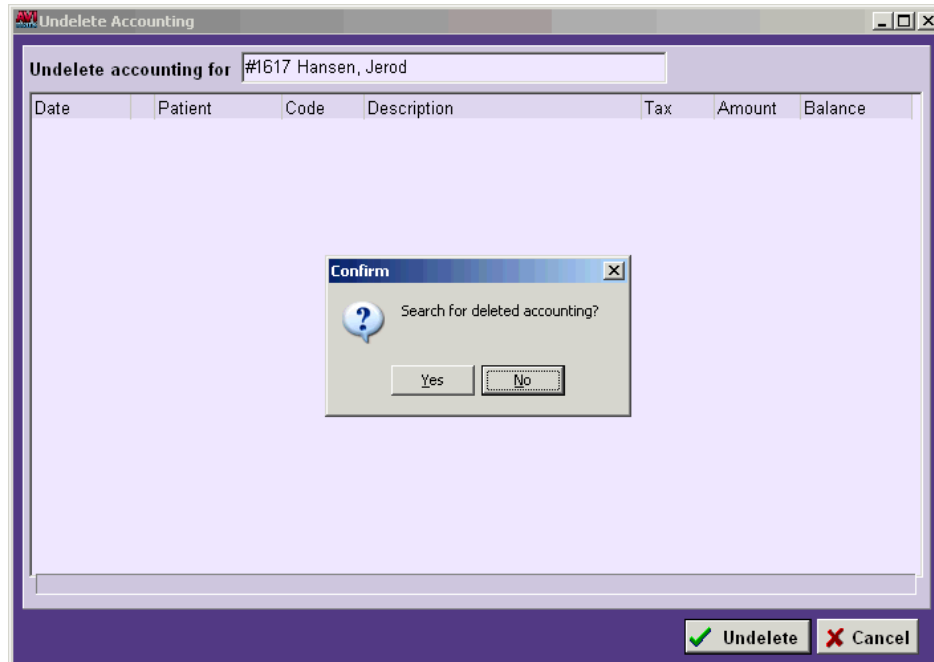
Create a Pre-Invoice

A Pre-Invoice may be created for clients to view expected charges prior to being posted to accounting. This will include unposted services, items, taxes, fees, and discounts. In addition, any charges the client currently has on an open invoice will also be displayed. These charges will be combined to be included on the Pre-Invoice. The printed copy of the Pre-Invoice may include a watermark indicating this is not a closed invoice. This option must be set in **Hospital Setup, Invoicing**. When the Pre-Invoice is printed or closed it will not post to accounting; all charges will remain unposted in the patient's Medical History until posted into Accounting.

- In the Client area, **right-click** and from the shortcut menu click **Pre-Invoice** to display the Pre-Invoice.

Undelete Accounting

AVImark gives you the ability to undelete accounting that has been previously deleted.



- In the detailed view of the client’s account window, **right-click** and from the shortcut menu click **Undelete** to display the Undelete Accounting window.
- You will need to click **Yes** at the prompt.
- **Right-click** to display the shortcut menu. Select the appropriate option. They are:
 - Select
 - Select All
 - Select by Deleted Client
- With the correct entries highlighted, click **Undelete**.

View an Accounting Entry History

AVImark gives you the ability to view a history record of entries in the clients Accounting window. Some information that will be recorded will be when the service was posted to accounting, when a payment was entered directly into Accounting, changes made to a payment or transaction, removing or undeleting services in accounting, etc.

- In the Client area **right-click** and from the shortcut menu click **Account**.
- Click once on the desired entry to highlight it.
- **Right-click** and from the shortcut menu select **Entry History** to view the history record for that entry.

Return a Check and Add a Fee

AVImark allows you to return a check and add a fee.

- In the Client area, **right-click** and from the shortcut menu click **Account**.
- From the Accounting window select the check payment which will be returned.
- **Right-click** and click **Return check**. You will need to click **Yes** to confirm.
- Click **Yes** to the prompt if a fee is to be added.

Dial the Client’s Phone Number

AVImark gives you the ability to quickly dial the client’s residence phone. If the client’s phone prefix is not

included in the **Prefix Table** of System Tables, AVImark will dial 1+ the client's area code, then the number itself. In the Client area, **right-click** and from the shortcut menu click **Dial** to display the Phone Dialer.

Print Client Labels

AVImark allows you to print mailing or other client ID labels.

- In the Client area, **right-click** and from the shortcut menu click **Label** to display the **Print Mailing Label** window.



- Using the **Print to** drop down list, select the correct printer.
- Enter the quantity of labels to print in the **Copies** field.
- Using the **Style** drop down list, select the label style you are using.
- Click **Print**.

Reprint an A/R Statement

AVImark gives you the ability to reprint an A/R Statement from the Client area.

- In the Client area, **right-click** and from the shortcut menu click **Reprint Statement** to display the **Accounts Receivable** window. Using the **Print to** drop down list, select the correct printer. Click **Print**.

CHAPTER 7: PATIENT AREA

Patients belonging to this client are listed alphabetically as name tabs at the bottom of the CID. These tabs will be displayed with a font color which matches the information appropriate for the patient. For example; a deceased patient name tab will be de-highlighted, patients due for reminders are displayed in red, and patients having transactions that are not yet posted to the client's account are displayed in blue.

PATIENT: Jeb						
Name	Jeb	Codes		Sex	N	1010 Bordetella, Booster 02-22-11
Birthdate	02-23-07	Age	3y	Rabies	12359	1120 Parvovirus Booster 02-22-11
Breed	Australian Cattle Dog	Plan	(none)			1133 Rabies Canine, 3yr 02-11-13
Color	Blue Merle	Weight	32.05	in	lbs	
Species	Canine	Allergy	(none)			
Reminders / Follow-ups / Estimate / Ownership / Schedule						
Medical History						


In this chapter you will learn about...

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- » Add/Change Patient(s) Information on page 121
- » Patient Insurance Tab on page 126
- » Viewing a Patient Chart on page 127
- » Printing a Patient Chart on page 127
- » Additional Chart Advanced Option on page 129
- » Work with the Reminders Folder on page 130
- » Set up a Patient Follow-up on page 132
- » Specify a Patient Estimate on page 133
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Choosing Patients

AVImark allows you to quickly move from one patient to another belonging to this client.

- Click the **name tab** of the patient you wish to work with from the bottom of the CID.

	To learn more about: Choose/Search for a patient	Search the Help for: Patient Area
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Add/Change Patient(s) Information

- In the patient area, **right-click** and from the shortcut menu click **New** to display the New Patient Information window.
- Enter the information about the new patient. When all information has been entered, click **Done**.

Patient name

This field is the patient's name.

- Type the patient's name.

Species

This field displays the species of the patient.

- Using the drop down menu, select the species.

Breed

AVImark gives you several options for entering the patient's breed. You may type a few letters of the breed and AVImark will display a list of those breeds containing those letters and then choose the desired breed. Or you can click on the drop down list to display the breed list in its entirety and choose the appropriate breed.



Because of possible misspellings of breed names when typing them into the Breed field, AVImark has incorporated an "Allow Auto-Add" feature. With this feature non-active, a user, when typing the breed name, must spell the name correctly and it must be in the Breed Table to allow them to continue with adding the new patient. Activated, a user may type the breed name and if misspelled and/or the breed name was not found in the Breed Table, the user will have the option of adding it to the table. For more information on the "Allow Auto-Add" feature, refer to "CHAPTER 2: SYSTEM TABLES".

- Using one of the methods as discussed above, select the breed type for this patient.

Color

Entering the color designation can be performed using the same procedures as the breed.

- Enter a color for the patient.

Mix

This field allows you to indicate that the breed is mixed.

- Select this box when the patient is of mixed breed.

Age

When the patient's birth date is entered, the age will be set automatically. Entering the patient age will change the birth date appropriately, as will the birthday when you enter an age of the patient. Enter the age in days, (e.g. 23d), weeks (e.g. 13w), months (e.g. 8m), or years (e.g. 11 or 11y).

Sex


The background of the patient area will appear pink or blue to represent the sex of the patient. The following table lists each sexual status code and its meaning.

- Click in the Sex field to display the drop down list of patient sex codes.
- Select the appropriate sex code for this patient.

CODE	EXPLANATION
F	Unaltered Female
M	Unaltered Male
S	Altered Female
N	Altered Male
S	Stallion
M	Mare
G	Gelding

Birthday

- Using the drop down calendar, enter the birth date. You may also type the patient’s birthday. Ensure to use slashes between the month and year.



It is especially important that you are accurate with the birth date since the reminder system of AVImark is sensitive of this information.

Unknown

This check box is used when you need to enter an approximate birth date of the patient. This will let AVImark know the patient’s age is an estimated date.

- If appropriate, select this box to indicate an approximate birth date.

Weight

This field displays the patient’s weight and unit of measure.

- Type the weight of the patient. Tab to the next field to enter the unit of measure.

Codes

Patient codes identify a certain status about the patient. You may specify up to 5 codes for a patient.

- Click in the **Codes** field to display the drop down list of Patient codes.
- Select the patient code(s) appropriate for this patient. The following is a list of the Patient Code and their meaning.

CODE	NAME	EXPLANATION
D	Deceased	Patient is currently deceased.
H	Hold Reminders	Suppresses printing reminders for this patient only.
I	Inactive Patient	Patient is currently inactive. This will also suppress the reminders for this patient.
E	Tax Exempt	Causes this patient to be tax exempt.
M	Moved or Missing	Indicates patient is moved or missing. This will suppress the reminders for this patient.

P	OTC Patient	Added to the patients under the Over-the-Counter client. It Voids the 30-day search period for unposted Medical History and speeds up the process.
S	Discount Split-billing	Applies pre-defined discounting on the patient to the co-owners account.
*	Aggressive	Marks the patient as aggressive and will display an alert.

Certificate

Each time a treatment with a Y action code is entered into Medical History AVImark allows you to record a certificate number.

- Type a number other than **0**. Each time this specific treatment is entered into Medical History, AVImark will automatically increment to the next certificate number.

Rabies

This field displays the current rabies tag number.

- Type the patient’s current tag number.

Locator

With an account set up with ePetRecords®, AVImark provides the ability to allow access of secure, on-line medical records to other veterinarians and the pet owner.

Microchip

This field displays the microchip or tattoo number up to 15 characters. This number will print on the AVImark vaccination certificate.

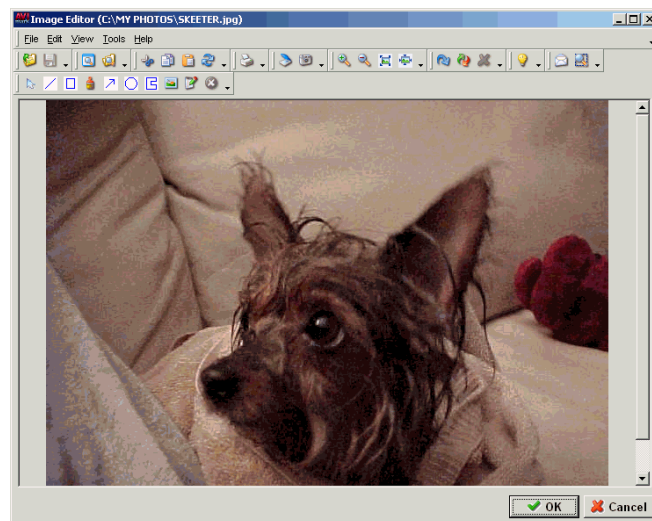
- If appropriate, type the microchip number.

Code

If the patient is currently enrolled in an AVImark Health Plan, the plan name will be displayed. You are not allowed to type any information into this field. Once the plan is selected for the patient, AVImark will fill in this field.

Photos

AVImark allows you to link photo images (jpg, bmp, tif or DICOM format) with the client, patient and medical history records.



Copy photos from a camera

- From the patient area, **right-click** and from the shortcut menu click **Photo**.
- In the AVImark Image Editor, open the **File** menu and click **Get Image**.
If your camera is not listed select File, Open from the menu and choose the appropriate drive where the camera is installed.
- Locate the appropriate image.
- Double-click the image name or click once and select **OK**.
- In the AVImark Image Editor, open the **File** menu and click **Save as**.
- With the correct file name in the **File name** field, click **Save**.
- Click **OK** to save the image.

Copy photos into \PHOTOS\Client number\Patient name.

- In Hospital Setup, System tab, set the **in sub-directories** field to **By Client, then patient**.
- In the Attachments area in the lower right corner of the CID, select the **Photograph** box to display the AVImark Image Editor.
- On the AVImark Image Editor, open the **File** menu. Click **Open** to display the Open window.
- Using the **Look in** drop-down list, locate the drive and directory where the camera's images are kept.
- Select the correct image and click **Open**.
- On the AVImark Image Editor, open the **File** menu. Click **Save as** to display the Save as window.
- Click **OK** to save the image.

Class (Discount)

AVImark uses this name to automatically discount the charges that are entered for a specific patient. With a Class Discount code entered here, this will override any Class Discount set up on the client.

- If appropriate, enter a class discount code.

Folder

This value will be displayed in parentheses, just to the right of the patient's name on the CID.

- Type the folder number.

Reminded

This is the date when a reminder is printed for this patient. AVImark will automatically fill this date in; however, you may also type a date if you print a reminder card for this patient only.

Added

This is the date the patient was added to your files. AVImark will automatically insert the current date. You may change this date by clicking on the drop down list to choose the appropriate date from the calendar. AVImark will ask you to confirm the change.

Suspend until

You may temporarily suspend the reminders for this patient.

- Using the drop down calendar, select the date to suspend reminders to.


Allergy

Entering an allergy for the patient will display a Patient Alert with the appropriate information when the patient is selected.

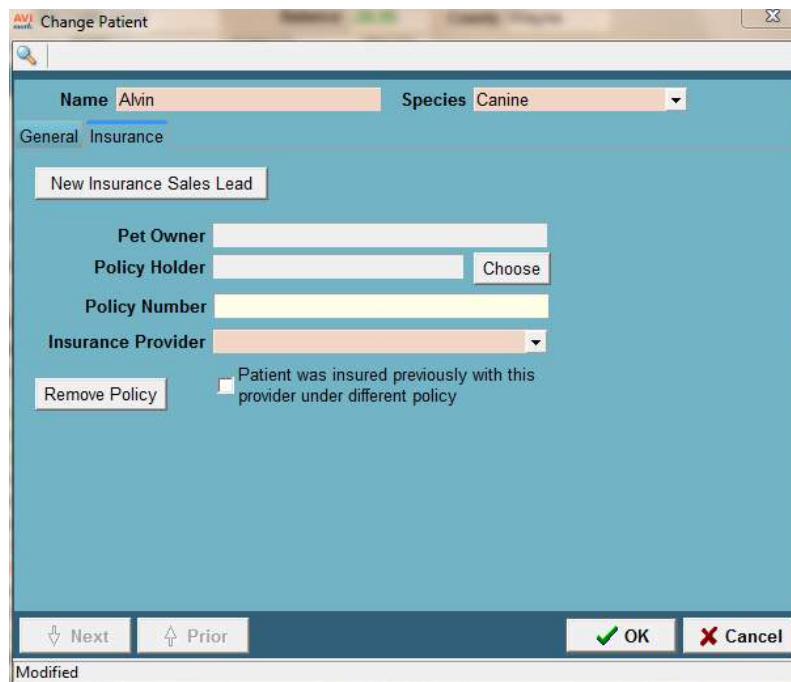
- Using the drop down menu, select appropriate allergies. To add allergies to this list from the CID select Work with, System Tables and add allergies to the Allergy Table.
- If the appropriate allergy is not listed simply type the allergy in the field.

Deceased

AVImark will fill this date in for you when the Patient is marked as deceased.

	To learn more about:	Search the Help for:
	Add New Patients	Add Patient
	Patient photos	Patient Photos
	Image Editor	Image editor
	Health plan	Discount plans; Health plans

Patient Insurance Tab



This tab works in conjunction with the VetEnvoy Insurance eClaim and eQuote integration.

	To learn more about:	Search the Help for:
	VetEnvoy Insurance Itegration	VetEnvoy

Vaccination Reminder History

After creating the patient the Vaccination History window will be displayed. Only those reminders you have chosen to appear in this window will be displayed.

- From this window enter the dates of the patient's last vaccinations.
- To not have this window automatically displayed, uncheck the option Show This Window When Pa-

tient Are Added.

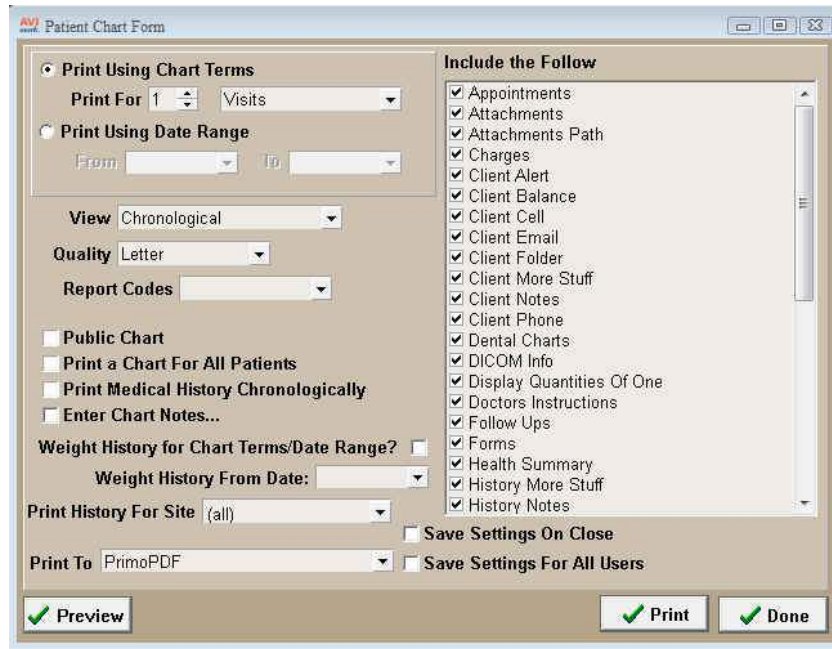
Viewing a Patient Chart

From the CID screen, view the Patient Chart print window using the clip board speed bar option at the top.

Loving Care Animal Clinic		Patient Chart		
Printed: 04-27-11 at 11:52a				
<u>CLIENT INFORMATION</u>				
Name	Mr. Michael Krueger (479)	Spouse	Seyer, Jessica	
Address	#5 Sugar Creek Road Piedmont, MO 63957			
<u>PATIENT INFORMATION</u>				
Name	Flower	Species	Canine	
Sex	Female, Spayed	Breed	Terrier, Parson Russell	
Birthday	09-02-08	Age	2y	
ID		Rabies	62692	
Color	White and Ticked	Weight	12.20 lbs	
Reminded	(none)	Codes		
<u>Reminders for: Flower</u>		<u>Last done</u>		
07-24-10	Lyme Disease Vaccination	07-24-09		
07-24-10	Canine DA2PP Vaccination	07-24-09		
<u>Flower's weight histo (in lbs)</u>				
07-24-09	12.00			
05-18-09	10.00			
02-10-09	7.00			
<u>MEDICAL HISTORY</u>				
Date	By	Code	Description	Qty (Variance)
09-21-10	DNS	151 331	Dental Prophylaxis, Canine Boarding, Canine 0-25 lbs.	20.50
09-01-10	JBW	VISIT	Patient check-in	
07-24-09	DNS	PP8555 202	Pruritus, Itching Annual Physical Examination	
HX: Itchy skin and here for vaccinations				
Overall well-being? Good.				
Any other Problems noted? None				
Weight stable? Yes				
Diet and Appetite: Normal Appetite; Diet is Purina				
On heartworm preventative? Yes				

Printing a Patient Chart

Right-click on the patient area and select chart.



Print Using Chart Terms

The chart length or term is been separated.

Report Code

A drop down list to select from the AVImark canned report code list.

Weight History for Chart Terms/Date Range

Check this box to use the exact same dates as selected above. To print Weight History for a different time-frame than the chart length, enter a From Date to specify the amount of weight history that needs to be reported.

Print History for Site

Click on the drop-down list to select the site you are printing the Chart for.

Include the following.....

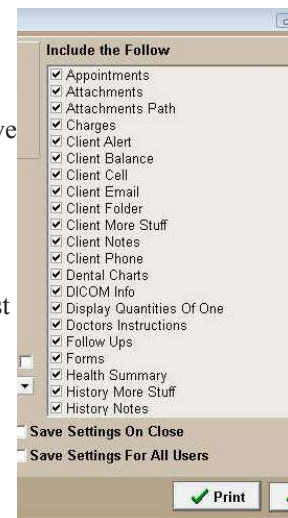
To set user-defined default settings by user, select the “Save Settings on Close” box when printing. Then every time that user logs-in AVImark will automatically check the appropriate options to print on the chart. Setting a default for all users check “Save Settings for All Users”. Checking this option, along with “Save Settings on Close”, every user will have the same chart settings

Attachments


AVImark gives the option to print actual file attachments with the chart instead of just listing the path of where the file is located.

Attachments Link Only

Will only print the path of the attachment showing where it’s stored.



Client, Patient and Medical History Alerts

Have been separated to allow alerts to be selected and printed individually. All alerts now print with the “caution”  symbol and all Medical Alerts print in bold.

Client Cell

Includes client cell phone number.

Client Email

Includes client email address.

Client, Patient and Medical History More Stuff

More Stuff options have been separated to allow information to print separately for each area instead of all together. Each option should be selected individually to print on the chart.

Client, Patient and Medical History Notes

Notes have been separated to also print individually accordingly to the option(s) chosen.

Dental Charts

Now print after the Patient Chart and shows the Medical History entry that had the chart attached by listing ‘Dental Chart\time\day’ on the chart print out.

DICOM info

This option is not yet functional.

Display Quantities of One

Will allow quantities of 1 or below entered in Medical History to print on the patient chart.

Doctors Instructions

The treatment Doctors Instructions will print on the chart directly under the associated entry.

Follow-Ups

Follow-ups that are currently due and those that are overdue will be included on the Chart.

Soap Client Instructions

Will now print on the chart; they are located in the Plan Area of the Medical Condition Record. These notes will appear on the chart under the entry the SOAP record is attached to.

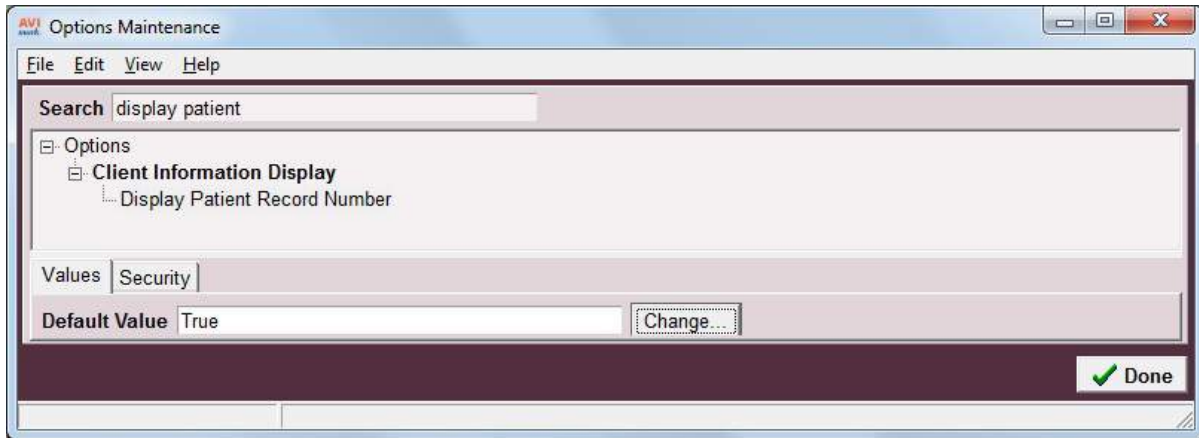
Additional Chart Advanced Option



From the CID select the **Advanced Options** speed bar button.

Display Patient Record Number

This is for clinics using the advanced option “Display Patient Record Number” on the Patient area of the CID. This option will need to be set to True and it will allow the record number to be printed on the Patient Chart. This feature was implemented for clinics using lab integrations that require proper associations for imported studies. Having this number print will make it easier to match up the printed results and patient charts.



- In the search field type display and select the option Display Patient Record Number.
- Change the Value to **True** and AVImark will display patient ID numbers on the CID screen to the right of the Patient area.

	To learn more about: Printing a patient chart	Search the Help for: Patient chart; Printing chart
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Work with the Reminders Folder

At the right side of the Patient Area, reminders which are appropriate for the patient will be displayed in a **Reminders folder**. Each reminder will be listed along with its due date. Any reminders that are displayed in red indicate they are past due, those due within the next 30 days will be displayed in blue, those reminders which are current will be displayed in black and those reminders that are patient specific will default to being displayed in green or the user defined color.

EXAM	Annual Health Exam	02-25-06
BORDVC	Canine Bordetella Vaccine	06-20-08
80	Rabies 1yr Canine Combo	06-20-08

Reminders
Follow-ups
Estimate
Ownership
Schedule

Restore Default Reminders

AVImark lets you add all the reminder templates specified in your Treatment List to a particular animal. This has the effect of re-applying those reminders which are appropriate for this species.

- In the Reminder folder, **right-click** and from the shortcut menu click **Defaults**. This will prompt you to discard current reminders for the patient and add default reminders.

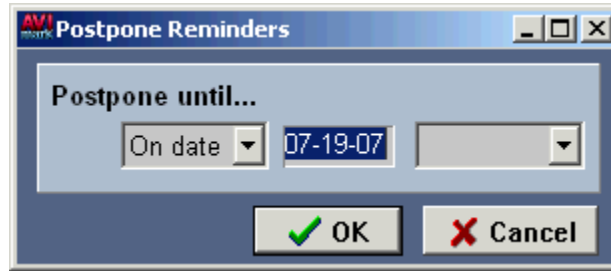
Post Reminder Treatment from the folder

AVImark allows you to post treatments which are listed in the reminder folder into Medical History. This will update the reminders and Medical History for this patient.

- In the Reminders folder, select the correct treatment. **Right-click** and from the shortcut menu click **Post**. You will need to click **Yes** to post the reminder to Medical History.

Postpone Reminders from the Reminders folder

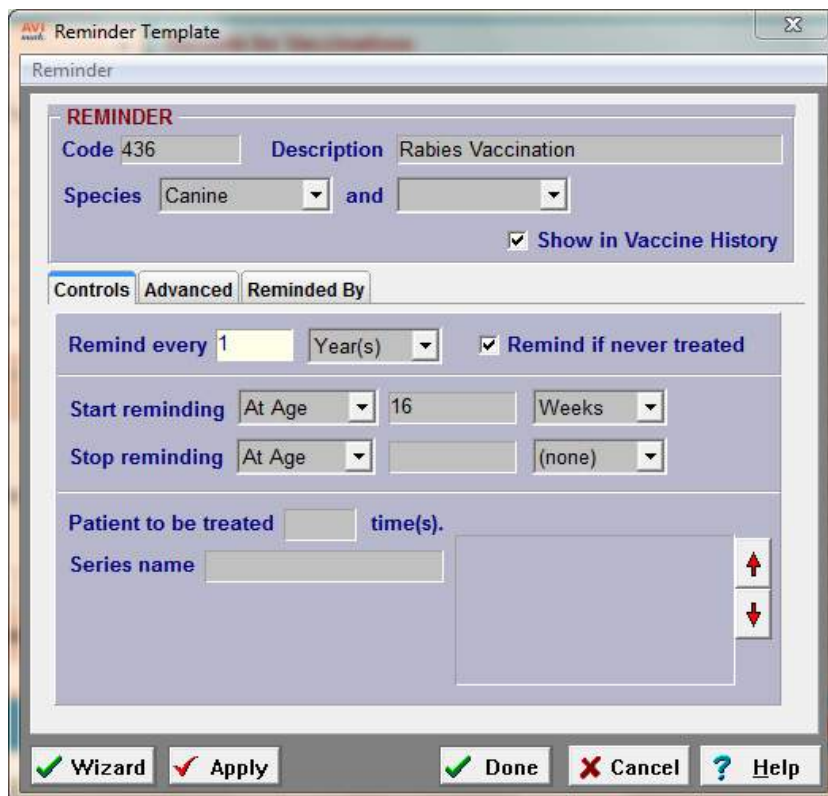
You may postpone the reminder dates for any treatments within the Reminder folder.



- In the Reminders folder, **right-click** and from the shortcut menu click **Postpone**.
- Using the drop down list, specify how you wish to postpone the reminder by selecting **At Age**, **In** or an **On date**.
- Type the appropriate value for the postponed time.
- Using the drop down list, select, **Days**, **Weeks**, **Months**, or **Years** where appropriate.
- Click **OK**. You will be prompted whether to postpone each reminder from the Reminder folder.

Add a new reminder template for this patient

AVImark lets you specify the conditions under which you want to remind for any treatment and/or inventory item you select. You do this in what are called Reminder Templates, which are normally set up for each treatment and applied to all patients at once. In addition, AVImark allows you to add or change a reminder from the reminder folder. Adjusting the reminder from the folder now makes the reminder specific for this patient.




- In the Reminder folder, **right-click** and from the shortcut menu click **New** to display the Patient Reminder Template.

- Set up the template appropriate for this patient and click **Done**.

Change a patient reminder template

When a given reminder is appropriate for certain patients, but due to special circumstances you need to change the reminder template and how it applies to this particular patient.

- In the Reminder folder, **right-click** and from the shortcut menu click **Change** to display the Patient Reminder Template.
- Adjust the template appropriate for this patient and click **Done**.

 *When you change the **Due date**, a **Due date set by user** checked box will appear to the right of the date indicating that AVImark's calculation has been overridden. The date will display in green on the Reminder folder indicating it is a patient specific reminder. If you need to return to the original date, just uncheck the box.*

Prevent reminder override

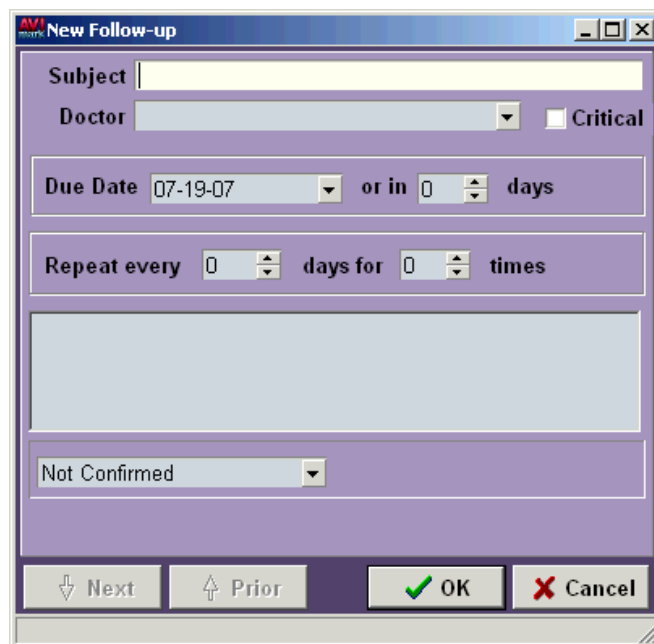
When a reminder template has been modified for a particular patient, AVImark allows you to prevent any changes to the modification, even though the template's normal specifications have changed in your Treatment List.

- In the Reminder folder, **right-click** and from the shortcut menu click **Change** to display the Patient Reminder Template.
- On the reminder template select the **Advanced Tab**.
- Uncheck the **Allow override from template** box and click **Done**.

	To learn more about:	Search the Help for:
	Working with the Reminders Folder	Reminders Tab


Set up a Patient Follow-up

The Follow-up listing is a list of patients who need to be called back after a short period of time. When a follow-up becomes past due, the Follow-up folder tab will be displayed in red.



- With the correct patient selected, select the Follow-up folder tab.

- **Right-click** and from the shortcut menu click **New** to display the Change Follow-up window.
- Using the **Subject** field, type the subject matter for the follow-up.
- Using the **Doctor** drop down list, select the **Doctor**.
- If appropriate, select the **Critical** box.
- Using the **Due Date** drop down calendar, select the **Due Date** or specify in how many days the follow-up becomes due.
- If appropriate, use the **Repeat every** fields and specify how often the follow-up should be repeated.
- Using the **Comments** section, specify any memos or notes and click **Done**.

	To learn more about:	Search the Help for:
	Set up a patient follow-up	Follow-ups Tab

Specify a Patient Estimate

You may specify one or more estimates for a patient by choosing one from the canned estimates as it is or modify it, and/or build estimates from scratch for the selected patient. AVImark also allows you to customize the name of the Estimate tab as well as additional areas that reference the Estimates such as the Work with menu and the Canned and Patient Specific Estimate windows. This can be done from the Option Maintenance area of Hospital Setup. Because of the extensive estimate handling capabilities, Estimates will be explained more in detail in “CHAPTER 16: ESTIMATES”.

Set up Ownership/Split-Billing

AVImark gives you the capability to divide charges entered for a patient among any number of clients. The Percent Ownership field in the Change Ownership window will display the existing owner’s percentage of ownership of the patient or be blank for you to enter the new owner’s percentage of ownership. In addition, the Ownership tab will allow the patient’s ownership history to be displayed. If a patient’s record has ever been moved from one client to another, using the move functions that are available, the previous owner(s) as well as the date that patient was moved will be recorded. All previous owner entries will be displayed in a gray color representing their ghosted ownership. This allows easy tracking of a patient’s owner history and the dates that correspond to the previous owners.

236	Kostial, Jeff	50%
456	Carter, Wynn	50%
170	Cunningham, Karen	100%
150	*** Confidential ***	100%

Reminders / Follow-ups / Estimate / **Ownership** / Schedule

- With the correct patient displayed, select the **Ownership** folder tab.
- **Right-click** and from the shortcut menu click **New** to display the Change Ownership window.
- In the **Client No** field, type the client number for the client to which split billing is to be applied.

- Using the **Percent Ownership** field, type the ownership percentage as a whole number. AVImark will calculate the percentages of ownership and will warn you if the percentages entered do not equal one hundred percent.
- If there is a time when you would like to hide a particular owner on the CID screen, this can now be done by using the **Public** checkbox. This option defaults to being checked in the New Owner window. Un-checking the Public option in the New/Change Ownership tab will prevent the owners full name from being listed. Owners that are not public will be displayed in the tab by the client account number and the ownership percentage amount. The clients name will be kept confidential by showing as asterisk in the ownership tab on the CID. Both current and previous owners can be marked public or not.
- If you would like to “de-activate” a previous owner select the **Previous Owner** box. This will display the previous owner grayed out within the Ownership Tab. Once an owner has been marked Previous Owner it is not possible to “reactivate” the same owner again from the Change Ownership window. To setup the owner again the client must be entered again with a new Start date to be associated with the patient as having part ownership.
- If appropriate, select **Has Ultimate Authority**.
- If applicable, type any notes appropriate for the entry. All the AVImark® notes feature options are available from this window.
- Click **OK**.

	To learn more about:	Search the Help for:
	Ownership/Set-up Split Billing	Ownership/Set-up Split Billing

Work with the Schedule Folder

From the patient’s Schedule folder, you may add new appointments, review and make certain changes to the scheduling status of a patient. AVImark has extensive boarding and appointment handling functions described in detail in “*CHAPTER 17: APPOINTMENT CALENDAR*” and “*CHAPTER 18: BOARDING CALENDAR*”.

Add, change or remove appointments and reservations


- With the correct patient displayed, select the **Schedule** folder tab.
- **Right-click** and from the shortcut menu click **New** to display the New Appointment window.

- On the **New Appointment** window, use the **Date** drop down calendar and select the date.
- In the **Time** field, use the UP and DOWN arrows to set the correct appointment time.
- Select the correct **Doctor** from the **Doctor** drop-down list.
- Enter any **Notes**, **Treatments/Items** and/or **Problems** associated with this appointment and click **Done**.

Check the Patient in

- From the Schedule folder tab of the correct patient, **right-click** and from the shortcut menu click **Check-in** to check the patient in.
- If the Whiteboard does not display, **right-click** on the Schedule folder to display the shortcut menu and click Whiteboard. For detailed information regarding the Whiteboard, refer to “*CHAPTER 19: WHITEBOARD*”.

Client	Patient	Unposted	In Date	In Time	Waiting	Out Date	Out Time
Smith, Frances	Zena		06-30-07	3:30p		07-19-07	11:00a
Terrill, Mike	Spice		07-09-07	4:31p		07-20-07	11:00a
Couchello, Marisa	Sparky		07-16-07	10:37a		07-20-07	11:00a
Street, Bill	Buddy		07-12-07	1:14p		07-23-07	11:00a

	To learn more about:	Search the Help for:
	Schedule folder Whiteboard	Schedule Tab Whiteboard

Add Patient Notes

AVImark allows you to create unlimited notes or memos about the patient. You may also import text files (files with an extension of .txt) and/or copy and paste note templates from the Note Glossary into any AVImark note window. For detailed information on adding, importing and creating note templates, refer to “CHAPTER 30: NOTE GLOSSARY AND Q & A”.

- In the Patient area, **right-click** and from the shortcut menu click **Notes**.

Delete a Patient

You may delete a patient including all Medical History related to the patient.

- From the patient area, **right-click** and from the shortcut menu click **Remove**.
- You will need to click **Yes** to confirm.

Undelete a Patient

AVImark allows you to retrieve Patient, Medical History and Accounting information that has been deleted from your files.

- From the patient area, **right-click** and from the shortcut menu click Undelete to display the Undelete Patients window.
- You will need to click Yes to confirm searching for deleted patients.
- Select the patient(s) you wish to undelete by highlighting the patient name and use the SPACEBAR to select (bold). You may also **right-click** and from the shortcut menu click Select All to undelete all patients listed.
- Select the patient information; Medical History, Reminders, Follow-ups, Split-billing, Appointments, and Boarding you would like to undelete using the same procedures for selecting patients.
- When all the appropriate information has been selected (bolded) click Undelete.

Move a Patient to another Owner

This feature allows you to move a patient and its Medical History to a different client file.

- From the patient area, **right-click** and from the shortcut menu click **Move**.
- You will need to click **Yes** to confirm the move. This will display the Client Selection window.
- Enter the new client information and click **Continue** to display the CID for the new client.
- Click **Yes** to confirm the move from one client to the other.

	To learn more about:	Search the Help for:
	Add patient notes Undelete a patient Moving patients	Add Patient notes Undelete; Undelete patients Moving patient; Moving

Access Patient Lab Information

By accessing the Patient Lab Information you can view test result history for a selected patient as well as export that data to Excel®. This is a Ready-Only window and allows you to view the result history based on test and organized by date.

- From the Patient area **right-click** and from the shortcut menu click **Patient Lab Information**.

- Individual test name tabs will be created for each test type that exists for the patient.
- Test information data for the selected Test Type tab can be exported to Excel® by selecting **File, Create Excel** from the menu area.

Print Patient ID Collar

This feature allows you to print a patient collar for pets which are boarded, hospitalized or checked-in by appointment. For this option to work you will need to print the labels to the Pet Detect CT-400, which can be purchased from PetDetect®.

- From the patient area, **right-click** and from the shortcut menu click **Print Collar**.
- Choose the collar size and the printer. Select what you would like to have printed on the collar.
- Click on **Details** to include specific client and patient information on the collar. To print the patients name in a large bold print on the collar check the **Enlarge Name** option.

View Patient Problem History

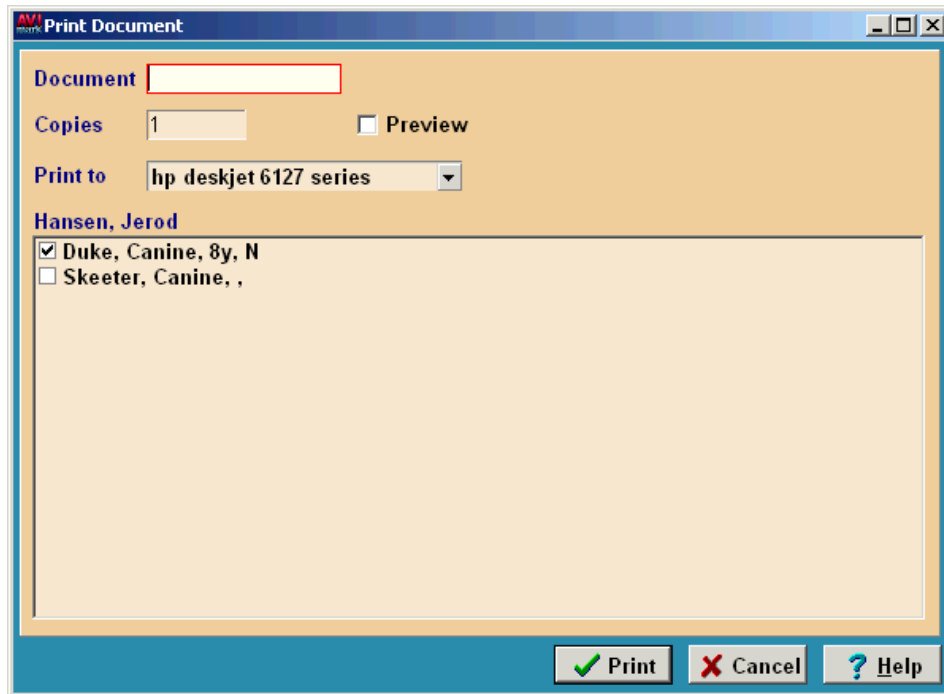
AVImark's Problem History feature allows you to view open or closed problems for the specific patient. A problem can be opened directly in the Problem Histories window, from the Medical History or from the SOAP (Medical Condition) window.

- From the patient area, **right-click** and from the shortcut menu click **Problems**.
- **Right-click** and from the shortcut menu select the desired option.
- **Open** to display the Problem List window and choose a problem to add.
- **New** to add a problem to the history by entering the code of the problem.
- **Change** to change information about an open problem.
- **Remove** to remove a problem from the history.
- **Close** to close a problem once it is resolved.
- Use the **Edit** shortcut menu to undo or redo changes and to select entries.
- From the **View** shortcut menu option you can refresh the screen, customize columns, view an entry history, preview or hide text and group columns.
- **View History** will return you to the CID with the Medical History entry linked to the open problem automatically highlighted.
- **Whogot** allows you to view and/or print a list of all patients who have been diagnosed with this problem.
- **Review the Document** associated with the selected problem.
- Select **Protocol** to view and/or add diagnostic protocols for this problem.
- Uses the **Notes** option to view and/or add notes about the selected problem.

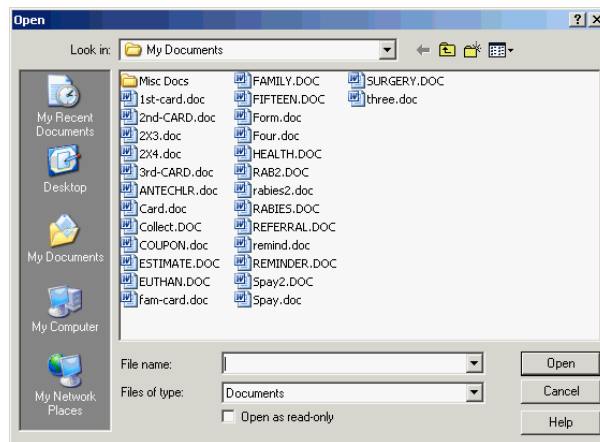
Printing Documents for Patients

You may print any MS Word document from the selected patient.

- From the patient area, **right-click** and from the shortcut menu click **Document** to display the Print Document window.



- In the Document field, **right-click** and from the shortcut menu click **Choose** to display the Open window.

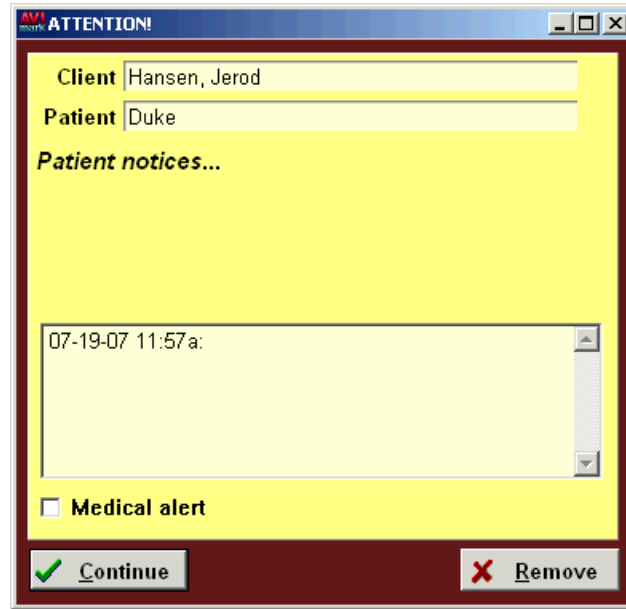


- Select the file name you wish to print and click **Open** to return to the Print Document window.
- Use the **Copies** field to specify the number of copies to print.
- Use the **Print to** drop down list and select the correct printer.
- Click **Print** or select **Preview** and click **Print** to preview the document on screen.


Creating a Patient Alert

This feature allows you to have an alert message appear when you first select the patient that the alert has been set up for.

- From the patient area, **right-click** and from the shortcut menu click **Alerts** to display the ATTENTION! window.




- Type the message you wish to have displayed on the alert.
- If the alert is of a critical nature, select the Medical alert box and click **Continue**.

	To learn more about:	Search the Help for:
	Print a document Patient alerts	Print patient document Patient alerts

Add File Attachments

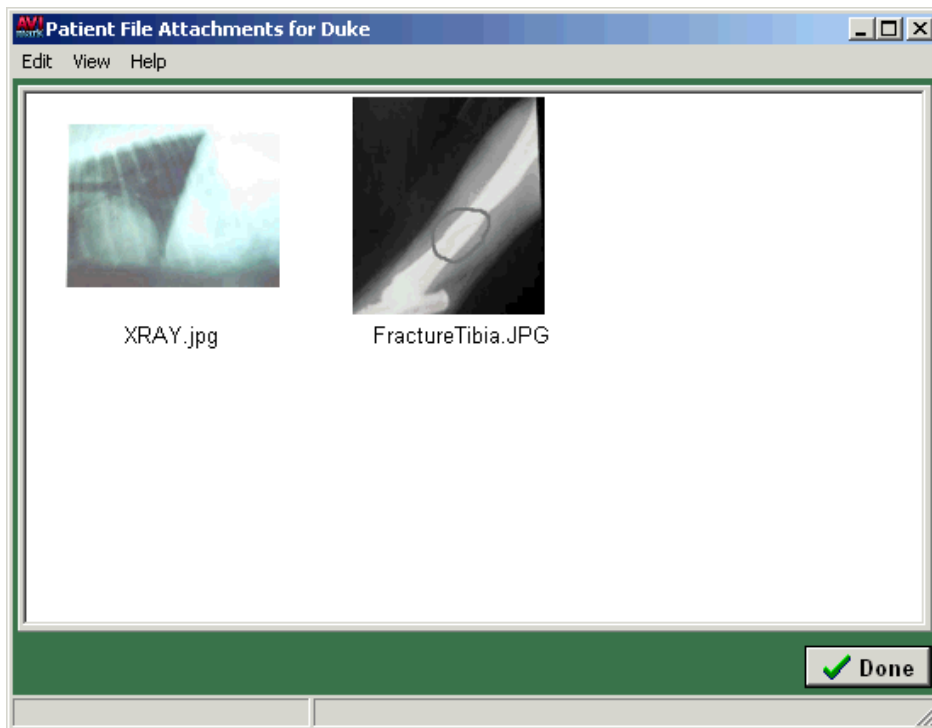
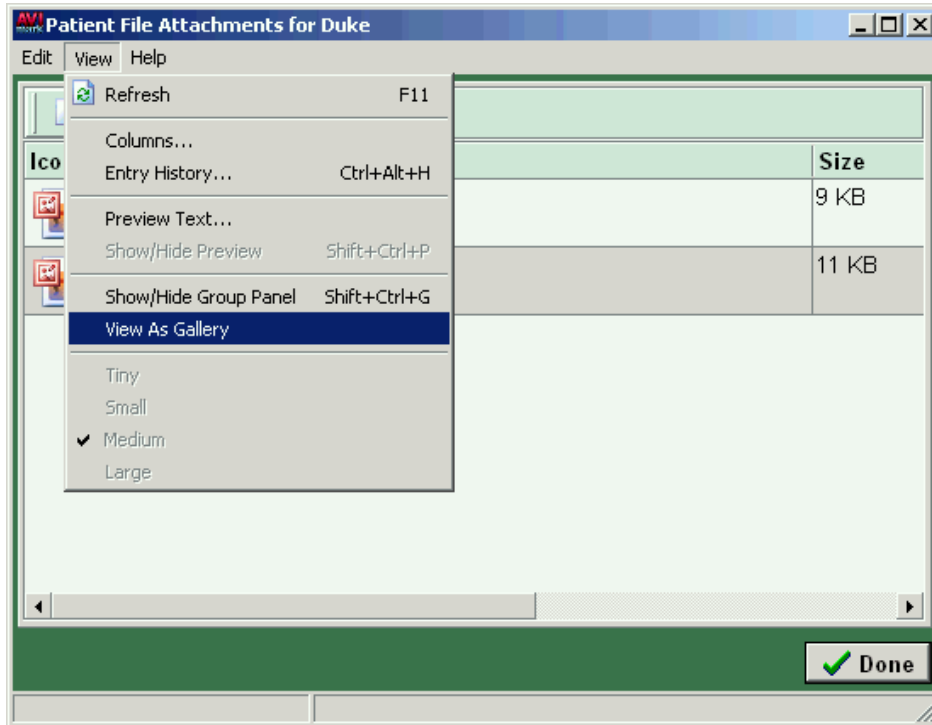
AVImark gives you the ability to attach multiple files to a patient such as; documents, images, spreadsheets, and so on.

- From the patient area, **right-click** and from the shortcut menu click **File Attachments** to display the Patient File Attachments for window.
- In the File Attachment window, **right-click** and from the shortcut menu click **New** to display the New Patient File Attachment window.
- In the **Filename** field, click  to display the Open window.
- Select the file name you wish to attach and click **Open** to return to the **New Patient File Attachment** window.
- Click **OK**.
- Attach multiple files using the same procedures.

View as Gallery

AVImark allows you to view photos as a gallery when multiple photos are attached to the patient.

- From the Patient File Attachment window, open the **View** menu. Click **View As Gallery**.



Add Notes

Notes can be added to any file; however, Gallery view must not be selected.

- Select the file you wish to add notes to. **Right-click** and from the shortcut menu click Notes to display the File Attachment Notes window.

- Type the notes pertaining to the file and click **Done**.

Preview notes attached to the file

- From the Patient File Attachment window, open the **View** menu. Click **Preview Text** to display the Columns window.
- Select the **Show Preview Text** option and select **Notes**.
- Click **OK** to return to the Patient File Attachment window.
- When finished click **Done**.

Add Invoice Instructions

You may enter Patient Instructions to be printed on the invoice.

- From the patient area, **right-click** and from the shortcut menu click **Instructions** to display the Invoice Instructions for window.
- Type the instructions pertaining to the patient and then click **Done**.

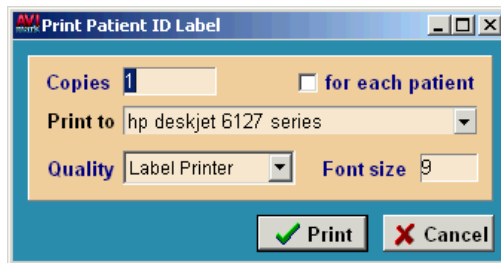
Viewing Patient Photos

AVImark lets you display an album style listing of all photos attached to the patient.


- In the patient area, **right-click** and from the shortcut menu point to **Photo**.
- Click **My Photo** to view or work with the photo that has been linked with the patient or click **Photo Album** to display a tabloid of all photos linked with the patient.

Print Patient Labels

You may print patient ID labels for any or all patients belonging to a client.



- In the patient area, **right-click** and from the shortcut menu click **Label** to display the Print Patient ID Label window.
- Use the **Copies** field to indicate how many labels you wish to print.
- Using the **Print to** drop down list select the correct printer.
- Select **for each patient** if you wish to print a label for each of the client’s patients.
- Click **Print**.

	To learn more about:	Search the Help for:
	Invoice instructions	Invoice instructions
	Patient labels	Patient labels

Define a Patient Work List

AVImark lets you define a Work List of jobs that would typically be assigned to appropriate staff to perform depending upon their abilities. For example: Update medical records; feeding; blood samples; recording vital signs, and so on. This list of jobs is up to you and may be defined in your System Tables. The Work List window is a free floating window that works along side the CID. Also if the Work List is left open and a patient is open on the CID, if the patient is on the Work List AVImark will automatically select the patient on the Work List.

Accessing the Work List

The Work Lists can be accessed by using one of two methods:

- From the CID menu area select **Clients, Work Lists**. You can then choose the list you want AVImark to display. The shortcut keys **Ctrl+Alt+F10** can also be used to open the lists.
- Or in the Patient area, **right-click** to display the shortcut menu, and point to **Lists** and click the appropriate **Work List** name.

Toggling Between Lists

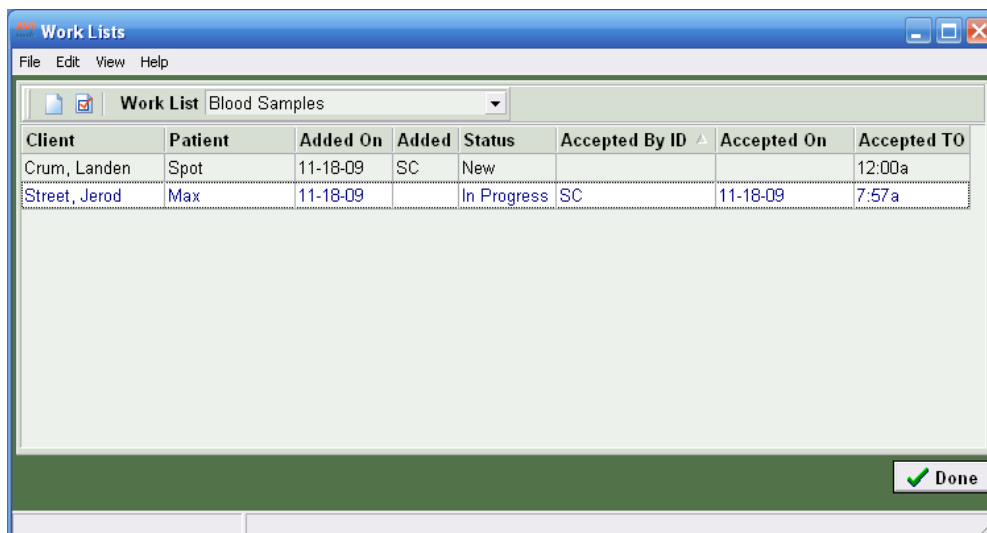
Once a Work List is open you can easily toggle between the lists you have defined.

- In the Work List click on the **Work List** drop-down arrow and select the list you wish to display.
- Or in the list press **Shift+Tab** until the Work List field is highlighted. In this field simply type a few characters of the list name you want to display and AVImark will display the list and the associated entries.

Manually assign a patient to Work List

You may manually assign a patient to any number of Work Lists so that a staff member may view or print a list of patients on the list(s) that is their job to perform.

- In the Patient area, **right-click** to see the shortcut menu. Point to **Lists** and click the correct **Work List** name.



- From the Work List window, **right-click** and from the shortcut menu click **New** to include the patient on the list.

Automatically link a patient to a Work List

AVImark allows you to assign up to three Work Lists Codes to any treatment so that when you perform the treatment, the patient is automatically added to one or more Work Lists. For more information on assigning Work List codes, refer to “*CHAPTER 3: TREATMENT LIST*”.

Enter/View Work List Notes

- With the correct patient highlighted in the Work List window, **right-click** and from the shortcut menu click **Notes** to display the Notes window.
- Enter the notes about the job as related to the patient and click **Done**.
- To view notes in the Work List window, open the **View** menu and click **Preview Text**.
- Click the **Notes** option and click in the **Show Preview Text box**.
- After clicking **OK** AVImark will display the notes directly on the screen.

Use the Work List

- In the Patient area, **right-click** to see the shortcut menu. Point to **Lists** and click the correct **Work List**.
- With the correct patient highlighted **right-click** and from the shortcut menu click **Accept** to display the CID for that patient. The **Status** for the selected patient will be set to **In progress**.
- After the work is completed, select the correct patient from the list.
- **Right-click** and from the shortcut menu click **Remove** to remove the patient from the Work List.
- You will need to click **Yes** to confirm.

Posting Work List Entries

After a patient has been accepted on the Work List and you have attached notes you might find it beneficial to post the entry to the patients Medical History. This will store the attached notes in Medical History which helps in keeping efficient notes.

- Open the appropriate Work List and select the correct patient.
- **Right-click** and from the shortcut menu click **Post** to remove the entry from the Work List and post the notes to the patients Medical History.

After closing the list and opening the patients file on the CID you will see the notes entry displayed in the pets Medical History.

Renew a patient on the Work List

When a patient has been accepted or removed from the Work List, the patient may be renewed/added back to the list.

If the patient has been accepted:

- Select the correct patient from the Work List.
- **Right-click** and from the shortcut menu click **Renew**. The **Status** for the selected patient will be set to **New**.

If the patient has been removed:

- From the Work List window, open the **Work List** menu and click **Show ghost** to display the removed patient.
- Select the correct patient from the Work List.
- **Right-click** and from the shortcut menu click **Renew**. The **Status** for the selected patient will be set to **New**.

Go to the selected patient

You may access any patient that is displayed on the Work List.

- Select the correct patient from the Work List.
- **Right-click** and from the shortcut menu click **Open Patient** to display the CID for that patient.

Transfer a patient to another list

You may transfer a patient from one Work List to another.

- With the correct patient selected in the Work List window, **right-click** to see the shortcut menu and point to **Change**.
- Click on the **Work List** drop-down arrow and select the Work List you wish to move the patient to.
- After clicking **OK** AVImark will transfer the selected patient to the Work List you had selected.

Additional Work List Options

The Work List can be customized to fit your needs by utilizing the customizable features and many features have been added to give flexibility when working in a Work List.

- In the desired Work List you can customize the displayed columns by selecting **View, Columns** from the **right-click** menu. Use this option to display or remove columns on the list.
- To select multiple entries highlight an entry and press the **Shift** key to select consecutive entries or use the **Ctrl** key to select random entries. You can then **Remove, Accept, Post** or **Renew** those entries by selecting the desired option from the **right-click** menu.
- To open the selected patients account open the **right-click** menu and point to **Open Patient**.

Add Patient to Work List at Check-In

By utilizing an Advanced Option AVImark will allow you to add a patient to a Work List at the time they are checked in.

Set up

Before you set the Advanced Option you will need to open Work With, System Tables and locate the Work List table. Open the Change window of the appropriate Work List entry and make note of the code.

- From the CID select the **Hospital Advanced Options** speed bar icon.
- In the **Search** field type **work** and select the entry **Add Patient to Work List Code**.
- Once the entry is selected click **Change** under the **Values** tab.
- In the **Value** field type the code of the Work List you want to add the patient to at the time they are checked in.

Once the pet is checked in they will automatically be added to this Work List.

Work Lists More Stuff

AVImark gives you the ability to create Additional Data Fields that can be utilized in the Change Work List window.

Setup

The additional data fields must be defined in System Tables.

- From the CID menu area select **Work with, System Tables**.
- Under the Table area click on the **Additional Data Fields** table and click once on the **Additional Work List Fields** entry.
- To begin creating additional data fields **right-click** and select **More Stuff Fields** from the menu.
- Enter the desired fields and click **OK** to save them and then click **Done** to close the window.

To have a blank field for typing information you will want to use the type of Phrase when defining the data field.

Using Additional Fields

After the fields have been defined they will appear in the Change Work List window.

- From the CID, **Patient** area open the desired **Work List**
- In the Work List highlight an entry, **right-click** and select **Change** from the menu.
- The additional field will appear at the bottom of the Change window ready for you to enter the desired information.

By utilizing the Columns feature you can display the defined Additional Data Field as a column on the Work List.



To learn more about:
Patient Work List

Search the Help for:
Work List Table

Export/Import Patients

This feature allows you to export client, patient, medical history, and reminder data for existing clients and patients to either a removable media such as diskette, CD, zip cartridges or to an internet-based site, called the AVImark Data Safe.

With either method, your data may be encrypted so that it is unreadable except by the AVImark provided data import feature. Your information is also protected by a password that is provided to you at the time the data export takes place. Only another AVImark clinic will be able to import the information into their data base using the automatically generated User ID and password displayed immediately following the preparation of the file for export. When the importing clinic imports the file into their AVImark program they will have the option of importing the patient information to the currently selected client's file or to a new client file.

Export client and patient records

- In the Patient area, **right-click** to see the shortcut menu. Point to **Export** and click either **Export patient(s)** or **GlobalVetLink®**.



The GlobalVetLink® option will create an xml file to be imported by the GlobalVetLink® Company. This company offers online travel certificate information. GlobalVetLink® is only available to clinics in the state of Florida.

- From the **AVImark Data Export** window, select the **Options** you wish to export.
- In the **Destination** area, select where you wish to export to.

- Click **Continue** to export and to display the **User ID** and **Password** which will be necessary during the import process.

Import client and patient records

- In the Patient area, **right-click** and from the shortcut menu click **Import patient(s)** to display the AVI-mark Import Data window.
- Enter the **User ID** and **Password** that was provided during the export.
- Select the appropriate import **Options**.
- Select from what **Source** to import and click **Continue**.

Use an E-Travel Sheet

AVImark gives you the ability to create and use an electronic Travel Sheet for patients.

- In the patient area, **right-click** and from the shortcut menu click **e-Travel sheet**.
- To display all codes in addition to those with the **F** action code, select **Show all entries**.
- Using the **Treatment**, **Inventory** and **Diagnosis** tabs, select the desired codes to add to the selected box.
- Click **Close** to save the codes for the patient.
- Click **Post** to add the codes to the patient's Medical History.



To learn more about:

Export/Import patients
GlobalVetLink®
E-Travel Sheet

Search the Help for:

Data export
GlobalVet
E-Travel sheet

CHAPTER 8: ENTERING MEDICAL HISTORY

Just below the Patient area of the CID is displayed the most recent medical history of the patient that is currently selected.

Medical History													
Date	Time	Dr.	Type	Code	Description	Qty	Amount	By	Photo	Pub	Attachments		
07-19-07	10:58a	DLM	P	PR445	Vomiting	1	0.00			Y	<input type="checkbox"/> Dental Chart	<input type="checkbox"/> Form	<input type="checkbox"/> Inventory Used
06-21-07	11:43a	DM	S	80	Rabies 1yr Canine Combo, #526451	1	11.00	DLM		Y	<input type="checkbox"/> Medical Condition	<input type="checkbox"/> More Stuff	<input type="checkbox"/> Notes
06-21-07	11:43a	DM	S	BORDVC	Canine Bordetella Vaccine	1	23.50	DLM		Y	<input type="checkbox"/> Photograph	<input type="checkbox"/> Attachments	<input type="checkbox"/> Vaccination
01-16-06	10:39a	DLM	S	653	Hospital To Observe	8	160.00	DLM		Y			
10-13-05	11:55a	DM	T	917	Parvo Antigen Test(stool)5615	1	43.00			Y			
10-13-05	11:55a	DM	T	922	Cite Allergy Test	1	63.00			Y			
10-13-05	11:55a	DM	T	918	Needle Aspirate Biopsy & Exam	1	30.00			Y			
10-13-05	11:55a	DM	T	924	K9 Comprehensive Plus 20	1	65.00			Y			
10-13-05	11:55a	DM	S	804	Pneumocystogram	1	95.00			Y			
10-13-05	11:55a	DM	T	926	Zz Thyroid Scan 45	1	57.00			Y			
02-25-05	2:44p	DM	S	8851	Bath & Flea Dip	1	45.00			Y			
02-25-05	2:43p	DM	T	EXAMD	Annual Health Exam	1	32.17			Y			
12-10-04	3:00p	DM	S (n)	8851	Bath & Flea Dip temp 98 weight 12 bcs 3.	1	45.00			Y			
12-06-04	10:31a		P	PR276	Limping intermittently	1	0.00			Y			

Chronological / Diagnoses / Diet / Injections / Lab / Rx / Reminder / Surgery / Vaccs / X-Ray / SOAP / Photos / Notes / Public / Problems

Duke / Skeeter

In this chapter you will learn about...

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- » Using the WhoGot List on page 160

Sorting Medical History

All Medical History entered for a patient is displayed in the default Chronological view. You may sort your Treatments/Inventory to the appropriate Medical View tabs which appear at the bottom of the Medical History section of the CID. By adding key words or letters, action codes and/or certain report codes, the Medical History will be sorted to the correct tab.

Chronological

Displays all medical history sorted by date performed.

Diagnosis

Display medical history entries that are part of your Diagnosis List.

Dietary

Display items that have either a Z as one of their Action codes, belong to a category name which includes the words Diet or Food.

Injections

Inventory items that have the word Inject in the category name or that have either a V or an M as one of their Action codes. Treatments which have the word Inject in the category name or have either a U or an M as one of their Action codes or an I as one of their Report codes/category report codes, will also be included.

Lab

Display treatments that have the word Laboratory in the category name or have an L as one of their report codes/category report codes.

RX

Display items or treatments that have the letters PHARM or PRESCRIPT as part of the category name or have a P as one of their action codes or P as one of their report codes.

Reminder

Display items or treatments performed that have a reminder template defined.

Surgery

Display services that have the letters SURGER in the category name or have an S as one of the report codes/category report codes.

Vaccinations

Display services that have the word Vaccination in the category name or have a V as one of their action codes.

X-Ray

Display treatments that have the words XRay, X-Ray, or Radio in the category name.

SOAP

Display treatments for which Medical Condition data has been recorded.

Photos

Display items or treatments for which a photograph has been linked.

Notes

Display items or treatments which notes have been linked.

Public

Display items or treatments which have notes marked as Public in the Enter Medical History window.

Problems

Displays problems that have been entered in the patient’s medical history.

Attachments

Displays medical history entries that have associated File Attachments.

Dental

Displays medical history entries that have a dental chart attached.

Requisitions

Displays medical history entries that have a lab requisition attached.

Radiographs

Displays medical history entries containing a radiograph attachment.

Use the Medical History Search Box

When you place the cursor in this box and begin to type, AVImark will limit and display only those treatments and/or inventory items that have been entered that begin with the letters typed.

Medical History								
Date	Time	Dr.	Type	Code	Description	ex	Qty	Amount
07-19-07	10:57a	DLM	T (m)	EXAM0	Annual Health Exam		1	35.75
07-17-06	1:21p	DLM	T	EXAM0	Annual Health Exam		1	0.00
10-13-05	11:55a	DM	T	918	Needle Aspirate Biopsy & Exam		1	30.00
02-25-05	2:43p	DM	T	EXAM0	Annual Health Exam		1	32.17
12-06-04	9:35a	DM	T (m)	EXAM0	Annual Health Exam		1	32.17
04-11-03	8:43a	DM	S	651	Hospital/Exam/Treatment		1	30.00
04-12-02	9:18a	DM	S	EXAM	Annual Health Exam		1	30.00

Working with the Attachments Window

If there have been photos, notes, conditions, vaccinations, inventory used or any file attachments specified for the selected entry, those check boxes will be marked accordingly in the Attachment window at the right side of the Medical History area. To display the information attached to the entry simply select the appropriate attachment listed.

Dental Chart

Create or view a Dental Chart for the selected entry.

Form

Display or create a new form template.

Inventory Used

Display or add inventory used with the service.

Medical Condition

Display or create a new Medical Condition record.

More Stuff

Display or enter Additional Data field information.

Attachments

- Dental Chart
- Form
- Inventory Used
- Medical Condition**
- More Stuff
- Notes
- Photograph
- Attachments
- Vaccination
- Tests
- DICOM

Notes

Display existing notes or enter new notes.

Photograph

Display an enlarged view of a photo linked with a service.

Attachments

When in the Medical History area, this will open the History File Attachment window to display all photos, Word documents and spread sheets that have been attached to the selected entry.

Vaccination

Display or enter new vaccine information for a treatment.

Tests

View or import test results for the selected entry.

DICOM

Send DICOM Imaging requests or view images by accessing the Sound Technologies viewer.

Entering Medical History

You may use the Enter Medical History window to enter the information about the treatment you wish to add to the Medical History Area of the patient. Typically you would need to only type the treatment, item, diagnosis or problem code and AVImark would fill in all the other information for you. However, on occasion you may need to make changes to the quantity, price you want to charge or to other default values.

Using the Medical History Window

- In the Medical History area, **right-click** and from the shortcut menu click **New** to display the Enter Medical History window.

The screenshot shows a software window titled "AVI Enter Medical History - For: Flower (Sex: S, Age: 2y, Weight: 12.20 lbs)". The window contains a form with the following fields and values:

- Date: 04/27/11
- Patient: Flower
- Code: (empty)
- Description: (empty)
- Quantity: 1
- ea: (unit)
- Amount: 0.00
- Photo: (empty)
- Co: 01
- At: 3:50p
- Type: Other
- Form: (empty)
- Xls: (empty)
- Problem: (empty)
- Public:
- Variance: 0
- By: (empty)
- Site: 0
- Journal: (empty)
- Zip: (empty)
- Decline:
- Doctor: DNS: David N. Sharp, DVM
- Admitted: DNS: David N. Sharp, DVM

At the bottom right of the window are three buttons: Done (with a green checkmark), Cancel (with a red X), and Help (with a blue question mark).

Date

The date the treatment was performed. This date will automatically display today's date or duplicate the date for the last treatment entered.

Patient

This field is the name of the patient for which to enter the entry into Medical History. AVImark will show the patient currently displayed on the CID.

Code

The treatment, inventory, diagnosis or problem code you wish to enter.

Description

AVImark will automatically enter the description according to the code which you have entered. You may however, edit the description:

Quantity

This field specifies the quantity of treatments or items dispensed. AVImark defaults to a quantity of 1; however, you are able to specify any number to 2 decimal places, for example; 2.67.

Amount

AVImark enters the amount for the service as specified in your treatment and inventory lists. You may change the price manually if needed.

Photos

This field allows you to link a photo related to the medical history entry.

Co

The Company number automatically defaults to the client company number, but may be changed manually if needed.

At

This is the time that the service was performed. This will be set by AVImark as the current time of day but may be changed manually if necessary.

Type

Denotes the kind of service performed. Although you are able to manually enter the value in this field, it is recommended that you do not alter the setting for a given treatment or item.

CODE	EXPLANATION
S	Non-Taxable Treatment
T	Taxable Treatment
L	Local Taxed Treatment
E	State Taxed Treatment
I	Non-Taxable Inventory
X	Taxable Item
C	Local Taxed Inventory
M	State Taxed Inventory
D	Diagnosis
P	Problem
O	Other
N	Appointment/Follow-up/Work List Notes
V	Check-In Visit
J	Journal

Public

This box is defaulted to being checked for you. However, you may uncheck this field if those services are not to

be displayed on a Patient Chart that is marked as Public.

Doctor

This is the doctor's ID who performed the service.

Form

This field allows you to attach an MS Word form to the Medical History entry.

- Double click in this field to attach a form to the entry.

Xls

You may attach an Excel spreadsheet file to any entry in Medical History.

- Double click in this field to attach an Excel spreadsheet.

Problem

AVImark allows you to associate the medical history entry with whatever problem the patient is being treated for. For detailed discussion on the Problem list, refer to "*CHAPTER 13: PROBLEM LIST*".

- Using the drop down menu select the appropriate Open problem.

Decline

This field is used to mark a recommended service as Declined in which the client has refused.

Admitted

This field is used to identify the doctor that admits the patient into the hospital.

- If appropriate, use the drop down menu to select an Admitted Doctor.

Variance

When dispensing a controlled substance, AVImark allows you to specify the amount, if any, that was spilled, broken, leaked, and so on. There are 2 fields provided for this entry; the first for the amount lost, and the second for the code for the reason of loss.

- When applicable, enter the amount and code of the controlled substance which was lost.

By

AVImark automatically enters the ID of the employee who is currently logged in. In the case where employees are not entered as users in Users and Security, you will need to manually enter this information.

Site

The site field, if being used, will allow the person entering the medical history to select the site at which they are currently entering the medical history from. Single site clinics **will not** be using the Site fields found in the AVImark program.

Journal

AVImark allows you to attach a Windows Journal file to any Medical History entry.

- Double click in this field to attach a Journal file.

Zip

This field is for clinics in the state of Kansas, Ohio, Georgia, and Washington. Due to different tax laws, this field provides the user with the ability to apply tax, not by what county the clinic is located, but by the area the services are performed in or items are purchased by the client, or by where the client is from.

- Type the zip code for where the services were actually performed.

Add New Medical History

You may add as many Medical History entries for the selected patient into the Medical History Area of the CID as you wish. There are several ways to enter Medical History entries:

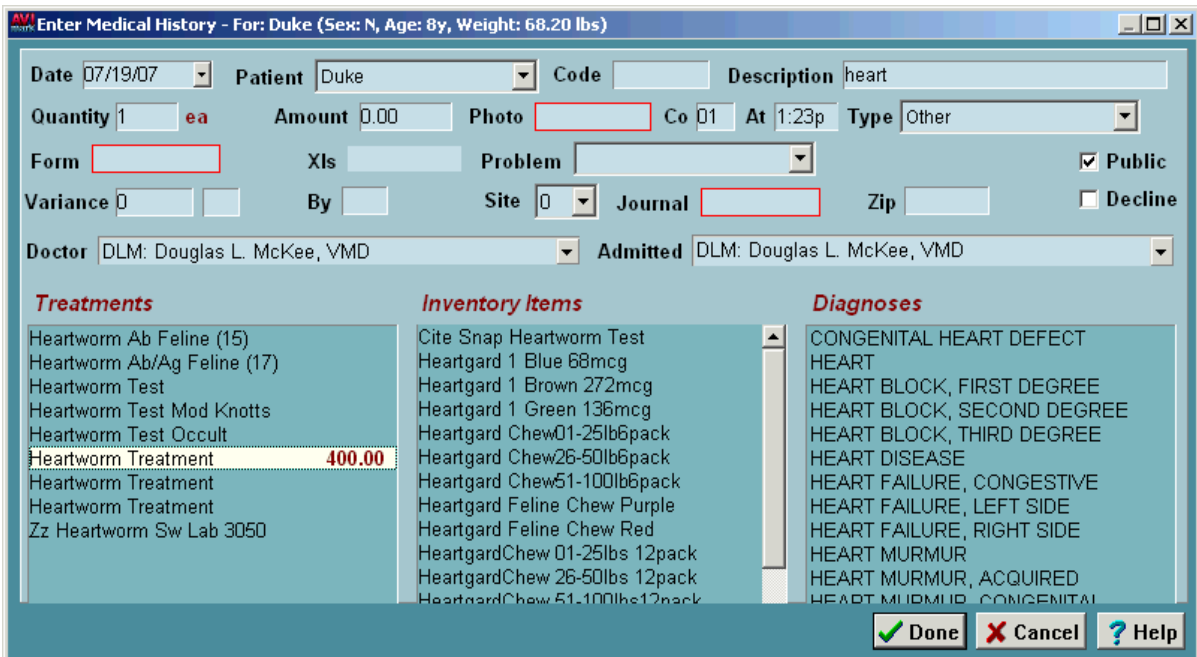
Adding Medical History Entries One at a Time

- In the Medical History area, **right-click** and from the shortcut menu click **New** to display the
- Enter Medical History window.
- Enter the **Code** of the treatment, item, diagnosis or problem.
- Using the TAB key, tab to the **Description**, **Quantity** and **Amount** fields which may be changed if you wish.
- Click **Done** to enter the service into Medical history.

Add Medical History Entries Using the Search Method

AVImark will find the service for you when the code is not known.

- From the Medical History area, **right-click** and from the shortcut menu click **New**.
- TAB to the **Description** field and type at least 3 letters for the Treatment, Item or Diagnosis you are looking for.



- Double click the Treatment, Item or Diagnosis.
- Tab to the **Quantity** and **Amount** fields which may be changed if you wish.
- Click **Done** to enter the service into Medical history.

Add Medical History entries using the Choose method

You may select treatments, inventory items, problems, and/or diagnoses by first opening the Treatment List, Inventory List, Problem List or Diagnoses List window.

- In the Medical History area, **right-click** and from the shortcut menu point to **Choose** and click **Treatments, Items, Diagnosis** or **Problems**.
- Select the correct treatment(s), item(s), problem(s) or diagnosis you wish and click **Done**.

Enter Treatments for Multiple Patients

AVImark lets you enter as many treatments, inventory items and diagnoses as you wish for multiple patients that you have selected.

- In the Patient area, **right-click** and from the shortcut menu click **Choose** to display the Choose Patient window.
- Select a patient and using the keyboard press and hold the CTRL key while selecting other patients to highlight them.
- With the correct patients selected, **right-click** and from the shortcut menu point to **Choose** and click **Treatments, Items or Diagnosis** to display the correct list.
- Select the correct treatment(s), item(s) or diagnosis you wish and click **Done** to add to the patient(s) Medical History.

Change Medical History Information

You may change the information for any Medical History entry. Any field within the Enter Medical History window may be changed with the exception of the code field.

- With the correct entry selected **right-click** and from the shortcut menu click **Change** to display the Enter Medical History window.
- After you have made the changes click **Done**.



Changes made after the entry has been posted to accounting will NOT be reflected on the client's accounting records.



To learn more about:
Entering Medical History

Search the Help for:
Add Medical History; Add New Medical History

Adding Medical History Notes

For a detailed discussion on viewing and adding notes, refer to “*CHAPTER 30: NOTE GLOSSARY AND Q & A.*”

- With the desired entry selected **right-click** and from the shortcut menu click **Notes**.
- To attach notes to this entry select **Enter Notes**.
- From the Notes **right-click** shortcut menu select **Show All** to view all notes, including prescriptions, directly in the Medical History.
- From the Notes shortcut menu select **Show All but RX** to view all notes except prescriptions.
- Selecting **Public Only** will display only notes that have been marked as public.
- To cause the notes to not be displayed on the Medical History area select **Show None**.
- **Show All with Note Action** will display those instructions that have been added to the entry either from the Treatment or Inventory List, and contain the action code of 2.

View and/or Add Medical History Doctor Instructions

When entering a Treatment, Item, Problem or Diagnosis into the Medical History of a patient, Doctor's Instructions that are linked to those codes can be viewed and modified from the CID.


- With the correct entry selected **right-click** and from the shortcut menu click **Doctor's Instructions**.
- After you have made the changes click **Done**.

Deleting and Undeleting Medical History

AVImark gives you the ability to remove and or undelete medical history entries.

Remove selected medical history

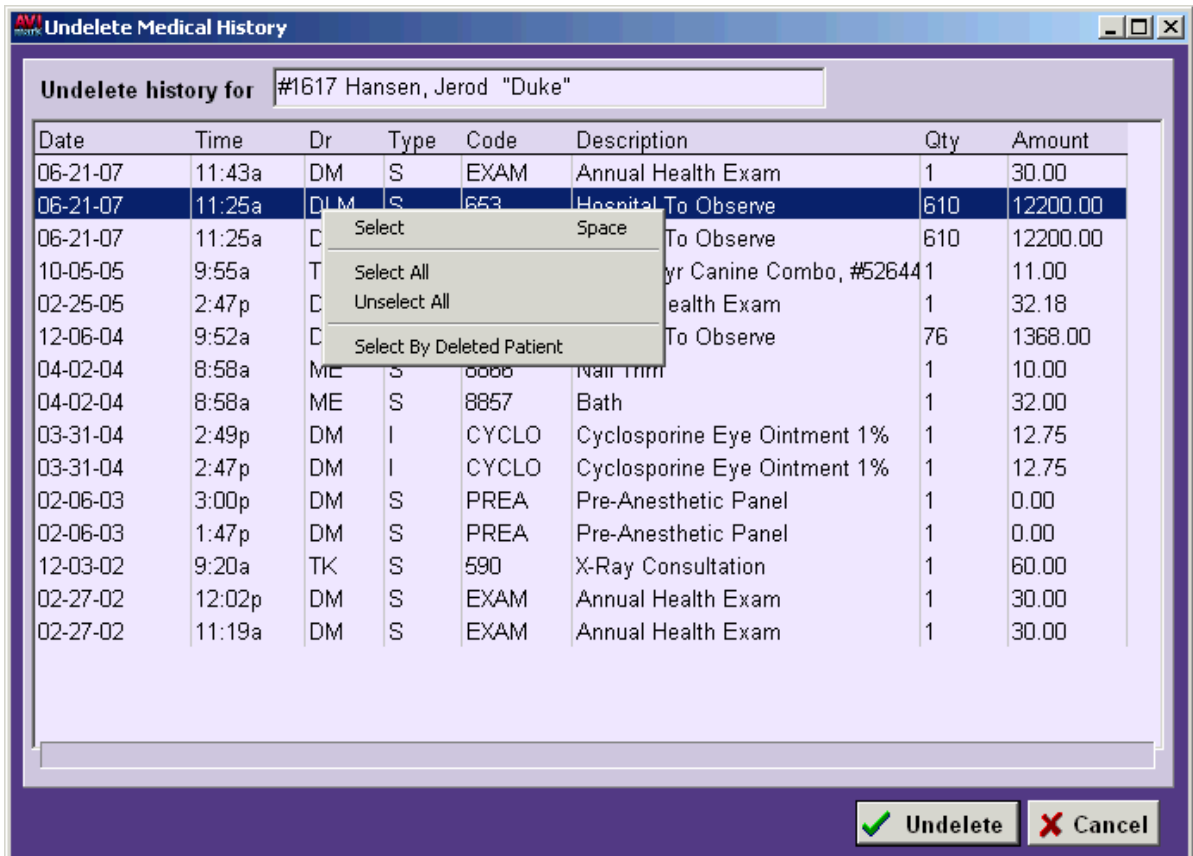
- Select the medical history entry. **Right-click** and from the shortcut menu click **Remove**.
- You will need to click **Yes** to confirm.



If the service had already been posted to the client's account, you will be prompted to confirm deletion from accounting as well.

Undelete medical history

- In the medical history area, **right-click** and from the shortcut menu click **Undelete** to display the Undelete Medical History window.
- You will need to click **Yes** to search for deleted history.



Date	Time	Dr	Type	Code	Description	Qty	Amount
06-21-07	11:43a	DM	S	EXAM	Annual Health Exam	1	30.00
06-21-07	11:25a	DLM	S	653	Hospital To Observe	610	12200.00
06-21-07	11:25a	D			To Observe	610	12200.00
10-05-05	9:55a	T			yr Canine Combo, #52644	1	11.00
02-25-05	2:47p	D			health Exam	1	32.18
12-06-04	9:52a	D			To Observe	76	1368.00
04-02-04	8:58a	ME	S	8888	Bath	1	10.00
04-02-04	8:58a	ME	S	8857	Bath	1	32.00
03-31-04	2:49p	DM	I	CYCLO	Cyclosporine Eye Ointment 1%	1	12.75
03-31-04	2:47p	DM	I	CYCLO	Cyclosporine Eye Ointment 1%	1	12.75
02-06-03	3:00p	DM	S	PREA	Pre-Anesthetic Panel	1	0.00
02-06-03	1:47p	DM	S	PREA	Pre-Anesthetic Panel	1	0.00
12-03-02	9:20a	TK	S	590	X-Ray Consultation	1	60.00
02-27-02	12:02p	DM	S	EXAM	Annual Health Exam	1	30.00
02-27-02	11:19a	DM	S	EXAM	Annual Health Exam	1	30.00

- Select the entry(s) to be undeleted. **Right-click** and from the shortcut menu click **Select** for the individual entry or click **Select All** to select all entries.

- Click **Undelete**.

Purge Data Files

AVImark gives you the ability to delete (purge) Medical History records older than a specified date, allowing you to completely remove old, unwanted Medical History records from your files. However, we strongly recommend that you **DO NOT** attempt this without the help of our Support Staff.

Printing a Rabies Certificate

Although the certificate would normally be printed automatically at the time you print the client's invoice, AVImark gives you the ability to print or even reprint a Rabies certificate from the Medical History area.

- Select the rabies vaccination in medical history. **Right-click** and from the shortcut menu click **Certificate** to display the Print Document window.

Declining Medical History Entries

AVImark allows you to identify a recommended treatment that has been declined by the client. These services will appear in medical history as de-highlighted, with the description of the treatment preceded by **DECLINED**.

- Select the correct medical history entry. **Right-click** and from the shortcut menu click **Declined**.
- You will need to click **Yes** to confirm.

Un-decline a declined service

- Select the declined entry. **Right-click** and from the shortcut menu click **Un-decline**.
- You will need to click **Yes** to confirm.

Discounting Medical History Entries


You may specify a discount for any entry in medical history that has not yet been posted to the client's account.

- Select the medical history entry that is to be discounted. If there are several entries to be discounted, hold down the **Left Mouse** button and move the mouse pointer over the entries you wish to discount.
- **Right-click** and from the shortcut menu click **Discount** to display the **Apply Discount** window.
- Select the **Retain previously overridden prices** option if you would like the discount to be added to any other discount this client is receiving. Select the **Restore normal price** option if you would like to apply the discount to the already discounted price per client discount class.
- As a whole number, type the discount percentage you would like to apply. For example, type **10** to indicate **10%**.
- Click **Continue**.

Printing an MS Word Document

You may print any MS Word document from the medical history area. If there are any merge words in the text of the document, information about the selected patient and client will be inserted into the document.

- In the medical history area, **right-click** and from the shortcut menu click **Document** to display the Print Document window.
- Double click in the **Document** field to display the **Open** window.
- Double click on the file name you wish to use.
- In the Print to field, specify the printer to print to and click **Print**. To display the document on screen, select **Preview** and click **Print**.

	To learn more about:	Search the Help for:
	Rabies Certificate Printing Documents	Rabies certificate; Print certificate Print MS Word document

Printing Prescription Labels


You may print a prescription label for any medical history entry.

- Select the correct medical history entry. **Right-click** and from the shortcut menu click **Drug Label** to display the Drug Label window.
- Type the information you want to appear on the label and click **Print**.

Refilling Prescriptions

You may refill prescriptions from the patient’s medical history. However, at least **1** day needs to have passed since the original prescription was filled.

- Select the correct medical history entry. **Right-click** and s from the shortcut menu click **Refill** to display the Enter Medical History window.
- Enter or change the quantity and/or provider if appropriate and click **Done** to display the original drug label.
- Enter any changes necessary on the drug label and click **Print**.

	To learn more about:	Search the Help for:
	Drug Labels Refill a prescription	Drug Label; Prescription label Refill; Prescription Refills

Adding File Attachments

AVImark gives you the option to attach multiple files to medical history entries, such as documents, images, spreadsheets, and so on.

- In the Medical History area, **right-click** and from the shortcut menu click **File Attachments** to display the File Attachment window.
- **Right-click** and from the shortcut menu click **New** to display the New History File Attachment window.
- Use the browse option at the end of the **Filename** field to search for the file you would like to attach.
- Select the file name you would like to attach and click **OK**.
- Attach multiple files using the same procedures.

Entering Medical History Forms

AVImark allows you to use Microsoft Word forms to extend the Medical History record keeping capability. In addition, any forms entered into a patient’s medical history through the use of this feature may be printed following the client invoice.

- Select the correct Medical History entry. **Right-click** and from the shortcut menu point to **Form** and click **Edit**.
- If no form was previously entered for the selected Medical History entry, click **Yes** at the prompt to display the Open window.
- Select the correct form and click **Open**.
- Enter the information desired on the selected form and then **Save** the document.
- To print the form from the Medical History entry, **right-click** and from the shortcut menu point to

Form and click **Print**.



To learn more about:

Entering Medical History attachments

Search the Help for:

Attachments; Medical History attachments

Using History Mode

You are able to enter medical history that happened at some time in the past in such a way that the client will not be charged for the entries. In addition, History Mode allows you to maintain the accuracy of the reminding capability of AVImark.

- In the Medical History area, **right-click** and from the shortcut menu click **History mode**.
- **Right-click** and from the shortcut menu click **New** to display the Enter Medical History window.
- Enter the **Code** of the Treatment or Inventory item.
- Using the TAB key, tab to the **Description**, **Quantity** and **Amount** fields which may be changed if you wish.
- Click **Done** to enter the service into Medical history.
- To exit History Mode, **right-click** and from the shortcut menu click **History**.

Specifying Inventory Used

You may specify inventory usage for any treatment in medical history. Normally, you would have already specified the inventory items used by each treatment when you set up your Treatment List so that when these treatments are performed, the correct inventory item quantities will be relieved.

Specify Inventory Used to a selected treatment

- Select the correct treatment in Medical History. **Right-click** and from the shortcut menu point to **Inventory** and click **Inventory used** to display the Inventory Used window.
- Click **Yes** at the prompt to display the Inventory List window.
- Select the inventory item(s) to enter into the Inventory Used window and click **Done**.

Add items and/or change quantities when inventory is already specified for the treatment

- Select the correct treatment in Medical History. Click **Inventory Used** in the **Attachments** area of Medical History to display the Inventory Used window.
- Select the correct item in the Inventory Used window. **Right-click** and from the shortcut menu click **Change** to change the item or click **Choose** to display the Inventory List window.
- Click **Done**.

Moving Medical History

You may move a selected medical history entry from one patient to another.

- Select the correct Medical History entry to be moved. **Right-click** and from the shortcut menu point to **Move** and click **To patient**. You will need to click **Yes** to confirm.
- In the **Client Selection** window, type the **client** and **patient's** name you would like to move the entry to and click **Continue** to open the patient's record.
- Click **Yes** to confirm the move.

Drag and drop Medical History to other patients


AVImark allows you to move Medical History entries by dragging history to the patient's tab listed at the bottom of the CID, or if the List Patients view is used, you may drag history to the list of patients in the center of

the CID. If multiple clients are open on the CID, you may drag history from one client to another by dragging onto the client tab, and then to the appropriate patient name.

- Select the correct Medical History entry and hold the left mouse button down until you see an attachment at the end of the mouse pointer.
- Drag the attachment to the correct **patient tab** at the bottom of the CID and continue to hold the mouse button until the record of the patient opens.

OR

- Drag the attachment to the correct **client's tab** and continue to hold the mouse button until that client's record opens.
- Drag the attachment to the correct **patient tab** at the bottom of the CID.
- Release the mouse button to display the options to either **Move Service(s)** or **Copy Service(s)**.
- Click **Move Service(s)** to move the entry, all included notes, inventory used, SOAP records, and so on.
- Click **Copy Service(s)** to add the service as if it were a new entry.

	To learn more about:	Search the Help for:
	Using History Mode	History mode
	Inventory used	Inventory Usage

Changing Medical History Sequence

You may change the sequence of Medical History entries in one of three methods. These are entries that either have not yet been posted to accounting or do not have a corresponding account entry.

- Select the correct Medical History entry. **Right-click** and from the shortcut menu point to **Move** and click either **Up (-)** or **Down (+)**. You will need to click **Yes** to confirm.

OR


- Select the correct Medical History entry and use the (-) and (+) keyboard keys.

OR

- Select the correct Medical History entry. Hold the left mouse button down until you see an attachment at the end of the mouse pointer and then drag the entry to the desired location.

Linking an Image to an Entry

- Select the correct treatment from Medical History. **Right-click** and from the shortcut menu click **Photo** to display the AVImark Image Editor.
- Within the Image Editor window select **Get Image** from the **File** menu to copy the image from a camera.
- Select the appropriate image and click **OK**.
- To copy the image from another director select File, Open.
- Select the appropriate image and click **Open**.
- To attach the photo to this entry select **File, Save as**.
- Enter the desired photo name and click **Ok** to save the image in the desired location.

	To learn more about:	Search the Help for:
	Photos	Link Photo; Medical history photo
	AVImark Image Editor	Image Editor

Entering Vaccination Information

Typically vaccination information is entered at the time the vaccination is entered into medical history. This vaccination information is originally entered in the *Vaccine System Tables*. When you enter rabies or any other vaccination for a patient into Medical History, the Vaccination Information window will appear immediately, provided the rabies treatment has an **R** Action Code and other vaccinations have the **V** Action Code.

- Enter the correct vaccine into Medical History to display the Vaccine Information window.
- If appropriate, make any necessary changes.
- If appropriate, use the **Vacc ID** field to enter the **Rabies tag number**.
- In the **Vaccine** field, use the drop down list and select the correct vaccine and click **Done**.

Using the WhoGot List

You may use the Whogot list to view, sort, print, or go to the CID of any patient receiving the selected treatment, item or diagnosis.

- With the correct Medical History entry selected, **right-click** and from the shortcut menu select click **WhoGot** to display the Treated Patients window.

Date	Client	Patient	Qty
04-27-11	Krueger, Michael	Flower	1
08-11-10	Harris, Kristi	Lizzy	1
08-11-10	Mahan, John	Elsa	1
08-11-10	Frank, Darla	Hooty	1
08-11-10	Frank, Darla	Dilla	1

	To learn more about:	Search the Help for:
	Vaccine information	Vaccine table
	Whogot list	Whogot

CHAPTER 9: CLIENT INVOICE

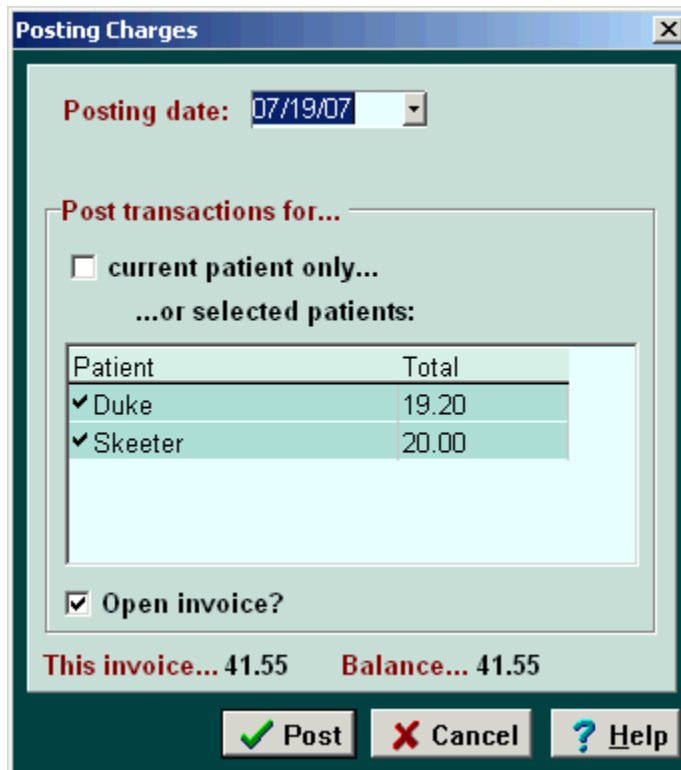
In this chapter you will learn about...

- » Post Charges to the Client's Account on page 161
- » Choose not to print the client invoice on page 162
- » Invoice Posting Date on page 162
- » Entering a Payment on page 162
- » Using a Cash Drawer on page 163
- » Display and Print an Invoice/Receipt on page 164
- » Modifying the invoice on page 164
- » Using the calculator on page 164
- » Reprinting an Invoice on page 164
- » Return an Item on page 165
- » Payments with X-Charge® on page 165
- » X-Charge Partial Approval Implementation on page 166
- » Payments with MPS on page 166
- » MPS Partial Approval Implementation on page 167
- » Handling Unprocessed Payments on page 168
- » Transfer Invoices on page 168

Post Charges to the Client's Account

Once the treatments performed and/or inventory items dispensed to the patient have been entered into the Medical History Area of the CID, these services/items will appear in blue and should be posted to the client's account. A new invoice will be opened with the charges listed and an opportunity to collect payment given.

- From the CID of the correct client, right-click and from the shortcut menu click **Post** to display the Posting Charges window.



Posting date: 07/19/07

Post transactions for...

current patient only...
...or selected patients:

Patient	Total
✓ Duke	19.20
✓ Skeeter	20.00

Open invoice?

This invoice... 41.55 Balance... 41.55

- To post charges for only the current selected patient, select the **current patient only** box or left-click

on the patients names to uncheck and prevent their charges from being posted.

- Click **Post** to display the Enter payment window.

Choose not to print the client invoice

You may post charges to the client's account record without taking a payment or printing an invoice.

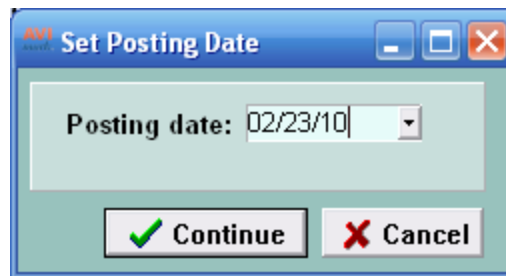
- Select the **Open Invoice** option.

Invoice Posting Date

AVImark gives you the option of changing the date of the posted entries to be included on another day's end of period reports if needed.

Temporarily change the posting date

- Using the drop-down calendar, select the correct posting date.

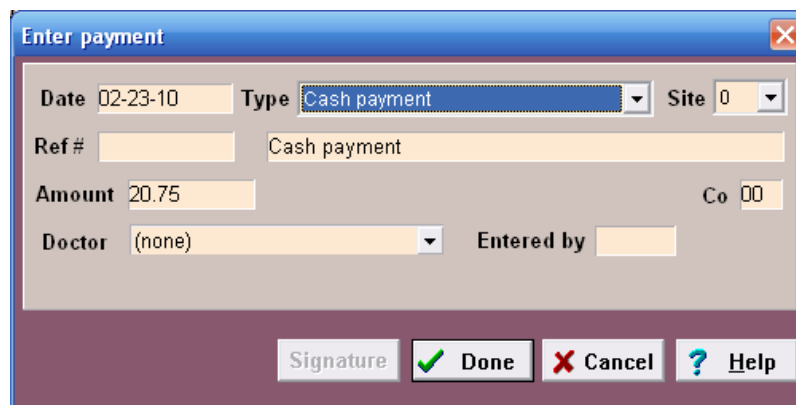


Change the posting date for several invoices

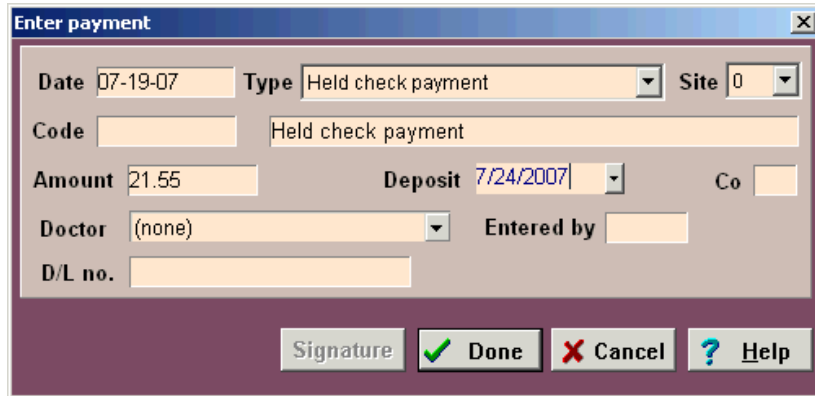
- There may be times when you need to input some amount of data for some date in the past or future. You may do this by choosing the Utilities menu and selecting **Posting Date**. Use the drop-down calendar to set the date and click **Continue**.

Entering a Payment

After the charges have been posted, the Enter payment window will be displayed.



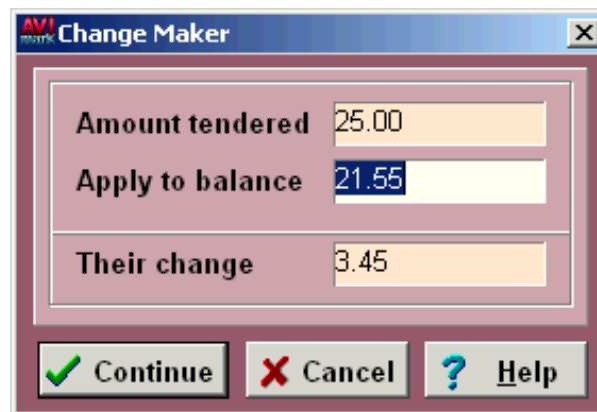
- Use the **Type** drop-down menu to select the payment type.
- When a check payment is selected, type the check number in the **Ref #** field.
- If a Held check payment type is selected, use the drop-down calendar and select the date of **Deposit**.




- If necessary, enter/change the **Amount**.
- If appropriate, type the initials of the person entering the invoice information in the **Entered by** field.
- Click **Done** to display the Invoice window.

Making Change

If the payment is by cash or for some other reason the customer makes a payment greater than the amount owed, AVImark allows you to make change using the Change maker.



- Click **Continue** to make change for the client. The change will be entered in the accounting window as a **Cash refund**.
- Click **Cancel** to Apply to the Balance.

	To learn more about:	Search the Help for:
	Posting charges	Post Charges
	Enter payments	Enter Payments; Enter payment window
	Posting date	Utilities menu

Using a Cash Drawer

With the cash drawer installed and a serial port assigned to it, AVImark will open the drawer when a payment is added. AVImark will open most computer-driven cash drawers that are attached to the computer via the system COM1 or COM2 serial ports. AVImark has been tested with the serial interface cash drawer sold by the **M-S Cash Drawer Corp. of Pasadena, CA**.

Display and Print an Invoice/Receipt

Once treatments have been performed on the patient(s) belonging to the client, these charges are posted to the client's account record, and an invoice/receipt printed.

The screenshot shows the 'Invoice' window for 'Your Pets Medical Services'. The date is 07-19-07. The invoice is for Mr. Jerod Hansen, Rt. 3 Box 3629, Springfield, MO 63694, with phone (673) 555-7420. The patient is Duke, with a charge of 19.20. The invoice number is open. The summary shows a balance of 0.00, charges of 19.20, tax of 2.35, payments of 21.55, and a new balance of 0.00. The print settings are hp deskjet 6127 series, Letter, 1 copy, with 'Preview' unchecked and 'Include notes' checked. Buttons for Print, Close, Quit, and Help are at the bottom.

Date	Patient	Code	Description	Qty	Amount
07-19-07			Cash Refund		3.45
07-19-07			Cash payment		-25.00
07-19-07	Duke	1944	Adams Flea & Tick Shampoo 12oz	1	19.20

Modifying the invoice

- From the Invoice window, right-click and from the shortcut menu click **Change** to display the Change Transaction window.
- To remove an entry, right-click and from the shortcut menu click **Remove**. You will need to Click **OK** to confirm the removal.
- Specify the number of copies of the invoice you want printed if different then the default setting.
- Select **Include notes** if there are any medical history notes to be included on the invoice.
- Click **Print** or to preview the invoice onscreen, select **Preview** and click **Print**.

Using the calculator

You may display and use a calculator tool from within the Invoice window.

- On the **Tools** menu, click **Calculator** to open and close the calculator.

Reprinting an Invoice


You may reprint an invoice if needed.


- From the Client's Account window, select the invoice you wish to reprint.

- Right-click and from the shortcut menu click **Reprint**.

Return an Item

- Enter the item to be returned into medical history using a negative quantity.
- Right-click and from the shortcut menu click **Post** to display the Posting Charges window.
- Click **Post** on the Posting Charges window to display the invoice.
- Right-click to display the shortcut menu. Point to **New** and select the refund payment type.
- Enter a negative amount in the Amount field and click **Done**.

 *To have the refund display on the invoice as a refund, you will want to remove the payment description from the field below the payment Type and enter in the sort of refund given. (cash refund)*

	To learn more about:	Search the Help for:
	Cash Drawer Return an item	Cash Drawer Returned Items

Payments with X-Charge®

You may enter credit card transactions directly through AVImark by using X-Charge®, Integrated Credit Card Processing. With the X-Charge® software installed, an X-Charge® window will be displayed each time a credit card payment is selected from the New Transaction screen. The information required in this window can be manually entered or automatically entered by swiping the card. Once the transaction has been authorized, the normal AVImark invoice will print and contain a statement confirming the client has agreed to pay the amount. Following the statement, a signature line will appear for the client to sign.

Capturing signatures for credit card payments

As of version 175, a digital signature capture devise (HHP TT3101) can be used to capture the client’s signature and store it in AVImark. Another signature capture device is the Topaz T-LBK462-HSB. A digital signature can be accepted from the client, printed on the detailed AVImark invoice, and stored within AVImark for future reference.

- From the New Transaction window, select the appropriate credit/debit card payment and click **Done** to display the X-Charge® window.



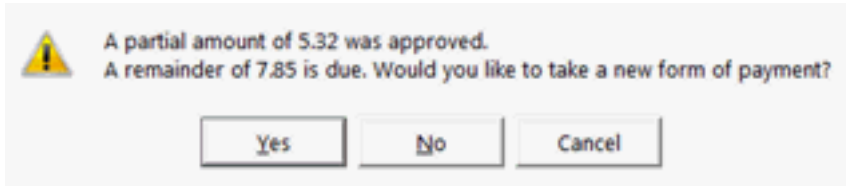
- Swipe the card or type the credit card number in the **Card No.** field.
- Select **Credit Card** to display an area for the client to sign and accept the signature.
- From the X-Charge® processing window click **Done**.

Debit Card payments

- Swipe the card or enter the debit card number in the **Card No.** field.
- Select **Debit Card** to display the number pad on the HHP TT3101 device for the client to enter the debit PIN.
- From the X-Charge® processing window click **Done**.

X-Charge Partial Approval Implementation

When taking a Mastercard payment including debit, only approved for for a partial payment, the AVImark user will be alerted that a secondary form of payment is required to fulfill the payment amount.



Selecting Yes will present a new AVImark Enter Payment window allowing you to select the secondary form of payment to complete the transaction. Both payments will be displayed on the AVImark Invoice as well as the available card balance, if balance information is returned by X-Charge.

Loving Care Animal Clinic
 123 QC Street
 Piedmont, MO 63957
 877-838-9273

INVOICE

Printed: 03-01-12 at 2:36p
Date: 03-01-12
Account: 15
Invoice: 2470

FOR: Carol Port
 8433 Cedarbrake
 Piedmont, MO 63957

Date	For	Qty Description	Price
		Total charges, this invoice...	0.00
		Your old balance...	141.00
		Total payment(s) received...	13.17
		03-01-12 Mastercard payment	5.32
XXXXXXXXXXXXXXX6781 Approval code: 945550 Card Balance: N/A X _____ <small>I agree to pay above total amount according to card issuer agreement. (Merchant agreement if credit voucher).</small>			
		03-01-12 Check payment	7.85
		Your new balance...	127.83

- If a debit Mastercard payment is taken there will be no signature line displayed on the invoice.
- Selecting Cancel will remove/void the payment completely. This option is recommended, in keeping with the mandate, to be used when a secondary form of payment is not available or has been declined.
- Selecting No will only place the partially approved payment amount into Accounting and on the Invoice with the remaining amount showing unpaid to the clinic.

Payments with MPS

McAllister Payment Solutions® is a secure credit card processing system and has worked hard to ensure that all aspects of the MPS credit card processing features are PA-DSS compliant. Credit card numbers should not be stored in a client note field and if you have done this in the past please contact Technical Support for assistance in properly removing these numbers.

Processing a Credit Card

McAllister Payment Solutions offers credit and debit card processing services, fully integrated into your AVImark system. The MPS processing services will provide an online reporting tool allowing you to review your transaction volumes at any time.

- From the New Transaction window, select the appropriate credit/debit card payment and click **Done** to display the McAllister Payment Solutions window.
- Swipe the credit card.
- If it is necessary to hand-key a card, selecting the **Hand Key** button will display an additional window allowing the user to enter the appropriate information.
- Swiping a card will immediately begin the card processing. Once the card is processed, you will be returned to the main Invoice window where a detailed invoice can be printed for the client and a duplicate can be printed for the client's signature which will be stored at the clinic.

MPS Partial Approval Implementation

When taking a Mastercard payment including debit, only approved for for a partial payment, the AVImark user will be alerted that a secondary form of payment is required to fulfill the payment amount.



- Selecting Yes will present a new AVImark Enter Payment window allowing you to select the secondary form of payment to complete the transaction. Both payments will be displayed on the AVImark Invoice.
- Selecting Cancel will remove/void the payment completely from the invoice. This option is recommended in keeping with the mandate, to be used when a secondary form of payment is not available or has been declined.
- Selecting No will only place the partially approved payment amount into Accounting and on the invoice with the remaining amount showing unpaid to the clinic.
- The AVImark Invoice will print the card balance on the receipt
- In the case the card does not have a remaining balance the invoice will read- Balance Not Available

Authorization Reversal

An authorization reversal is a real-time transaction initiated when the customer decides that they do not want to proceed with the transaction, or if the merchant cannot complete the transaction for any reason. Authorization reversals free up the customer's available balance on their debit, prepaid or gift card.

Printing Signature Slip Receipts

A small ticker-tape receipt can be printed to a Dymo® LabelWriter. This signature slip-receipt can be activated by setting the Hospital Setup...Advanced Option Print Signature Slip on Credit Care Transactions to **True**. When a credit card transaction is added to an invoice and processed through MPS, the signature slip-receipt will be automatically printed when the card processing is complete and you are returned to the main invoice window. You can then select to print the regular invoice that will be given to the client.

When adding and processing a credit card transaction that is not part of an invoice, a message will be displayed asking if an invoice is needed for this transaction. The signature slip-receipt will print immediately following the response selected for this message.

AVImark's recommended label printers can be used to print this signature slip-receipt. The printer used to print the signature slip-receipt can be selected within Utilities, Printer Setup, Receipt.

The dimensions used for the signature slip-receipt paper cannot be modified at this time. The appropriate size of this continuous feed paper can be viewed and/or purchased through Veterinary Wholesale Supplies. This receipt paper can be used with the AVImark recommended Dymo® printers. Please visit www.veterinarywholesale-supply.com to purchase the continuous feed receipt paper for your Dymo® printer.

Paperless Credit Card Signatures

It is possible to have paperless credit card signature receipts through MPS by accepting digital signatures from your clients. Using a Topaz T-LBK462-HSB signature capture device, a digital signature can be accepted from the client, printed on the detailed AVImark invoice, and stored within AVImark for future reference. Having a digital signature stored which can be accessed at any time prevents any type of paper-trail for credit card transactions.

Setting the Advanced Option, Enable the Topaz Signature Capture Device, to **True** will allow a signature to be prompted for once a card has been swiped or hand-keyed.

Once the client has authorized the transaction with their signature, the processing will be completed. This signature will be saved by client within a sub-folder of the AVImark directory named Signature.

Handling Unprocessed Payments

Deposit Slip Report

When a MPS credit card window is manually closed to prevent the payment from being logged, AVImark places a line in Accounting to show as UNPROCESSED. Payments will display as UNPROCESSED on the Deposit Slip report.

From AVImark Accounting window

AVImark now allows the ability to remove UNPROCESSED from an Accounting Transaction line. Hospital Administrators can secure this by assigning the security function ACT07 to the administrative group that has authority to enter UNPROCESSED payments into Accounting. (Users authorized to ACT13) Once UNPROCESSED has been added into Accounting, in the case that the payment type needs to be changed, AVImark allows the user to manually change this transaction line by doing right-click Change and selecting Cash, Check or another card.

Once the transaction IS processed AVImark allows the following:

- Allows the UNPROCESSED line to be changed.
- Changes the color of the entry in Accounting from green to black.
- Records the change in Accounting Entry History of the payment to show that it was originally unprocessed and someone processed the transaction manually.
- Displays correctly on the Deposit slip so the payment isn't allowed to show as UNPROCESSED.

Transfer Invoices

When transferring invoices from one client to another the entire invoice can be transferred or just the invoice total.


- From the original clients accounting window highlight the invoice that needs to be transferred.
- From the right-click shortcut menu select **Transfer**.
- Enter the client account number the invoice is being transferred to.

- Select **Adjustments Only** to transfer only the balances of the invoice as an account adjustment.
- Click **Done** to transfer the invoice balance.

OR

- From the original clients accounting window highlight the invoice that needs to be transferred.
- From the right-click shortcut menu select **Transfer**.
- Enter the client account number the invoice is being transferred to.
- Select **Move Entries** to move all transactions associated to the selected invoice.
- To maintain the original patient name when the invoice is move to another client select **Hold Patient Name**.
- The option **Clear Patient Name** allows the accounting entries to be moved to the new client without having them assigned to a particular patient.
- Selecting the **Retrieve Patient Name** option will allow the Medical History entries associated to the invoice line-items to be searched and discovered. Once these associated entries are discovered, the new patient that is now linked to those history entries will be auto-assigned to the invoice line-items.
- After selecting the desired option click **Done** to complete the invoice transfer.

When an invoice is transferred from the original client an entry will appear in the Account History indicating the invoice was transferred and will contain the client account number it was transferred to. For the client the invoice was transferred to an entry will also appear in their accounting indicating the invoice was transferred with the invoice number.

	To learn more about:	Search the Help for:
	Capturing Signatures	Signature
	Transferring Invoices	Transfer invoices
	McAllister Payment Solutions®	MPS

CHAPTER 10: ACCOUNTS RECEIVABLE

In this chapter you will learn about...

- » Printing Statements on page 171
- » Undo Statements on page 172
- » Reprint Statements on page 173
- » Print the A/R Summary Report on page 173
- » Printing Collection Letters on page 174

Printing Statements

- On the CID, open the **Work with** menu. Click **Statements** to display the Accounts Receivable window. Once the appropriate information has been entered click **Print**.

The screenshot shows the 'Accounts Receivable' window with the 'Statements' tab selected. The window contains several input fields and checkboxes. The 'Print To' field is set to 'hp deskjet 6127 series'. The 'Sort by' dropdown is set to 'Name'. The 'For client' and 'Start client' fields are empty. The 'Company' field is set to '01'. The 'Codes' field is empty. The 'Open Invoices' dropdown is set to 'Prompt To Close'. The 'Apply service charge' checkbox is checked, with 'Last charged: 03/29/02' displayed below it. The 'Reprint statements?' checkbox is unchecked, with 'Last printed: 03/29/02' displayed below it. The 'Print as of' dropdown is set to '07/19/07'. The 'Balance >' field is set to '1.00'. At the bottom of the window, there are three buttons: 'Print' (with a green checkmark icon), 'Done' (with a red X icon), and 'Help' (with a blue question mark icon).

Print to

Select the printer to print statements to by using the drop-down list.

Sort by

AVImark allows you to sort statements when printing. You may sort by:

- Name
 - Zip
 - Account
 - Balance
- Use the drop-down list and select the sort by method.

For client

You are able to print a statement for a single client.

- If appropriate, type the Client Account number to print a single statement.

Start client

AVImark allows you to choose a starting point when the printing process was interrupted or stopped.

- Type the Client Account number of the last statement that printed.

Company number

You may print statements for any group of clients by Company number.

- Type the Company number to print for a certain company.

Client codes

AVImark allows you to print statements by Client Code.

- Enter the Client code to print for clients with a certain code.

Open Invoices

AVImark needs to know how you wish to handle invoices that have not yet been closed. You may choose:

- Close Automatically
- Leave All Open
- Prompt To Close
- Using the drop-down list select how you wish to handle statements when printing.

Apply service charge

AVImark will apply service charges according to the specifications you have indicated in Hospital Setup, Advanced tab, Statements, Fees.

- Select the box to apply a service charge.

If you wish for AVImark to only apply the service charge on the original balance even when the balance becomes past due, you will need to set up an additional option.

- From the CID select the **Wrench** speed bar icon.
- In the **search** field type **accrues** and select the option **Service Charge Accrues From Service Previous Charges** and set it to **False**.

With the option set to False AVImark will not add the service charge to the balance that has accrued service charges it will only be applied to the original balance.

Print as of

You may choose a date you want to start printing as of. AVImark will print itemized charges from this date, back to the last date and time statements were printed.

- Use the drop-down calendar and select the date to print as of.

Balance >

You may specify a dollar amount to print statements for. Clients, whose balance is less than what is indicated, will not receive a statement. AVImark has a default setting of \$1.00.

- Type the dollar amount you wish to print statements for.

Undo Statements

AVImark gives you a way to **Undo** the last time you ran statements. Choosing this option removes the last time service charges were added to overdue accounts. It also removes any Balance Brought Forward records in cli-

ent's accounts. Furthermore, AVImark resets the date for which statements will be itemized to the previous time statements were run.

- From the Accounts Receivable window, open the **Statements** menu and click **Undo**.
- Click **Yes** at the prompt to continue.
- Click **OK** at the results window to return to the Accounts Receivable window.

Reprint Statements

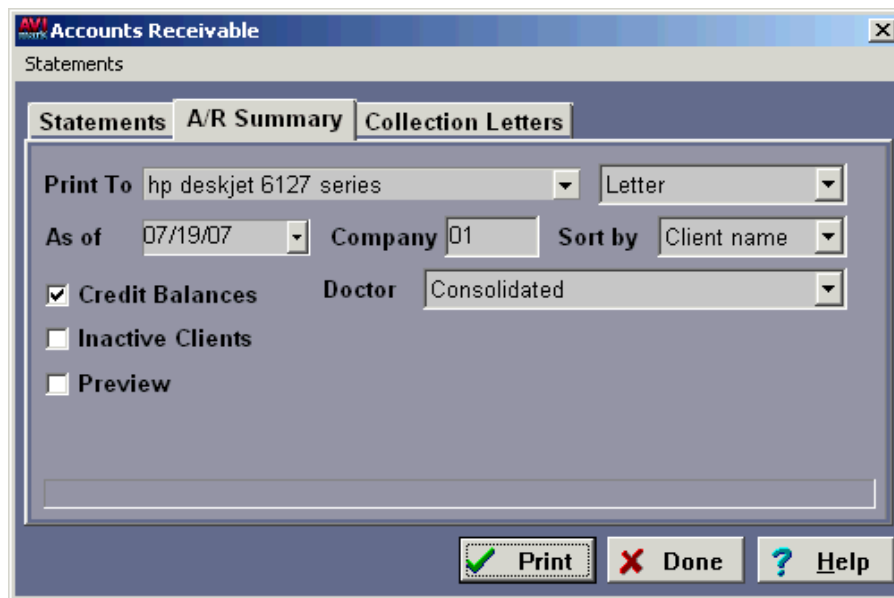
AVImark allows you to reprint copies of your statements just as though it were the date you printed statements last. However, AVImark will **NOT** add any duplicate service charges or billing fees. Furthermore, AVImark will not include detailed charges on the statements that have occurred **SINCE** the last time you printed statements.

- If desired, select the **Reprint statements** box.

Once you print statements, AVImark will check the Reprint Statements box for you automatically for the next 15 days to keep you from accidentally charging duplicate service charges on client's accounts.

Print the A/R Summary Report

- You may print the Aged accounts summary report for any period of time. To print the A/R Summary, select the **A/R Summary** tab from the top of the Accounts Receivable window. Once the appropriate information has been entered click **Print**.



Print to

- Using the drop-down list select the printer to print to.

As of

You may specify the date to print as of.

- Using the drop-down calendar select the date to print as of.

Company number

You may print the summary for any group of clients by Company number.

- Type the Company number to print for a certain company.

Sort by

AVImark allows you to sort the A/R summary when printing. You may sort by:

- Client name
 - Zip code
 - Account no.
 - Balance due
- Use the drop-down list and select the sort by method.

Doctor

AVImark allows you to print the summary by doctor. Clients with a credit will not be listed on the individual doctor's report. Selecting the Consolidated option will print the A/R Summary for all doctors.

- Using the drop-down list select the doctor.

Credit Balances

AVImark will include a list of all active clients with credit balances when the A/R Summary prints. This option is checked by default.

Inactive Clients

You may include a list of all inactive clients with a balance when the summary is printed.

- If applicable select this box.

Preview

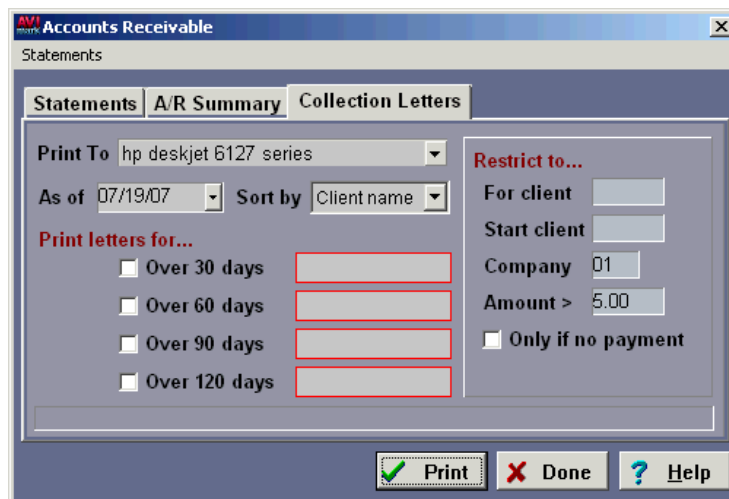
You may view the A/R Summary on screen.

- Select the **Preview** box and click **Print**.

Printing Collection Letters

AVImark lets you specify and print the appropriate MS Word documents for each group of clients who have overdue outstanding balances.

- Once the appropriate information has been entered click **Print**.



Print to

- Using the drop-down list select the printer to print to.

As of

You may specify the date to print as of.

- Using the drop-down calendar select the date to print as of.

Sort by

AVImark allows you to sort the A/R summary when printing. You may sort by:

- Client name
 - Zip code
 - Account no.
- Use the drop-down list and select the sort by method.

Print letters for

AVImark allows you to print an appropriate MS Word document for any client that is 30, 60, 90, or 120 days overdue on their account.

- Select one or more of the boxes you wish to print a letter for.
- Doublet-click in each of the red document boxes for which you have checked.


Restrict to

You may print the collection letters using certain restrictions.

- If applicable, type the information for any specific restriction(s).

Only if no payment

Using this option, AVImark will only print collection letters for clients who have not made a payment within the last 30 days.

	To learn more about:	Search the Help for:
	Print statements	Printing statements
	Undo statements	Undo statements
	Reprint statements	Reprinting statements
	A/R Summary report	A/R summary
	Print Collection Letters	Collection letters

CHAPTER 11: REMINDERS

AVImark lets you specify the conditions under which you want to remind for any treatment and/or inventory item you select.

In this chapter you will learn about...

- » Creating a Reminder on page 177
- » Remind As on page 178
- » Printing Reminder Templates on page 180
- » Applying Reminders Globally on page 181
- » Creating Patient Specific Reminders on page 181
- » Changing a Patient Reminder Template on page 182
- » Purging Reminders on page 182
- » Printing Reminders/Reminder Analysis on page 182
- » Printing Reminders using AVImark or MS Word® on page 185
- » E-Mailing Reminders on page 186

Creating a Reminder

- From the Treatment/Inventory List, select the treatment or item you would like to remind for.
- **Right-click** and from the shortcut menu click **Reminder** to display the Reminder Template.
- You will need to click **Yes** to confirm.

The screenshot shows the 'Reminder Template' dialog box in AVImark. The main section is titled 'REMINDER' and contains the following fields:

- Code:** 436
- Description:** Rabies Vaccination
- Species:** Canine (dropdown menu)
- and:** (empty dropdown menu)
- Show in Vaccine History**

Below this is a tabbed interface with three tabs: 'Controls', 'Advanced', and 'Reminded By'. The 'Controls' tab is selected and contains:

- Remind every:** 1 (text input) Year(s) (dropdown menu)
- Remind if never treated**
- Start reminding:** At Age (dropdown menu) 16 (text input) Weeks (dropdown menu)
- Stop reminding:** At Age (dropdown menu) (text input) (none) (dropdown menu)
- Patient to be treated:** (text input) time(s).
- Series name:** (text input)

At the bottom of the dialog are five buttons: 'Wizard' (with a green checkmark), 'Apply' (with a red checkmark), 'Done' (with a green checkmark), 'Cancel' (with a red X), and 'Help' (with a question mark).



To assist in the setup of various values that determine how AVImark reminds for each treatment, you may want to use the step-through function called the Reminder Setup Wizard. Select the Wizard button at the beginning of each template setup to use.

Code/Description

AVImark will insert the Treatment code and Description for you when you choose to create or update a Reminder Template.

Species

You may choose 2 species. If the reminder applies to all species, you will not need to select a species.

- Use the **Species** drop down list and select the correct species.

Show in Vaccine History

- Check this option to have the reminder displayed in the patient's Vaccine History window.

Remind every

This allows you to specify the interval of time in which the patient should receive the treatment.

- Type the number in the first box and then using the drop down menu select the periodicity. (For example 1, Year).

Remind if never treated

This field will be used in conjunction with the Start/Stop reminding fields. If this box is not checked, a patient who has never received the treatment will NOT receive a reminder for it until the treatment has been put into the patient's medical history.

- If appropriate, select this box to remind patients as they come due the first time in their life, based on the patient's age.

Start/Stop reminding

You may specify when you want reminders to start and stop for this treatment. If you do not want to remind for the treatment until it has been performed at least once on any given patient, do not check the **Remind if never treated** box and do not specify a **Start reminding** age, just leave the fields blank.

- If appropriate, use the second field and the drop down list from the third field to specify the **Start reminding** age. Typically, the **Stop reminding** field would be left blank.

Patient to be treated

This allows you to specify the number of times a patient should have the treatment done in its lifetime.

- Type the number value and click **Done** to finish the template.\



For setting up more complicated treatment series, you may contact our experienced Technical Support staff at 877-838-9273, option 1.

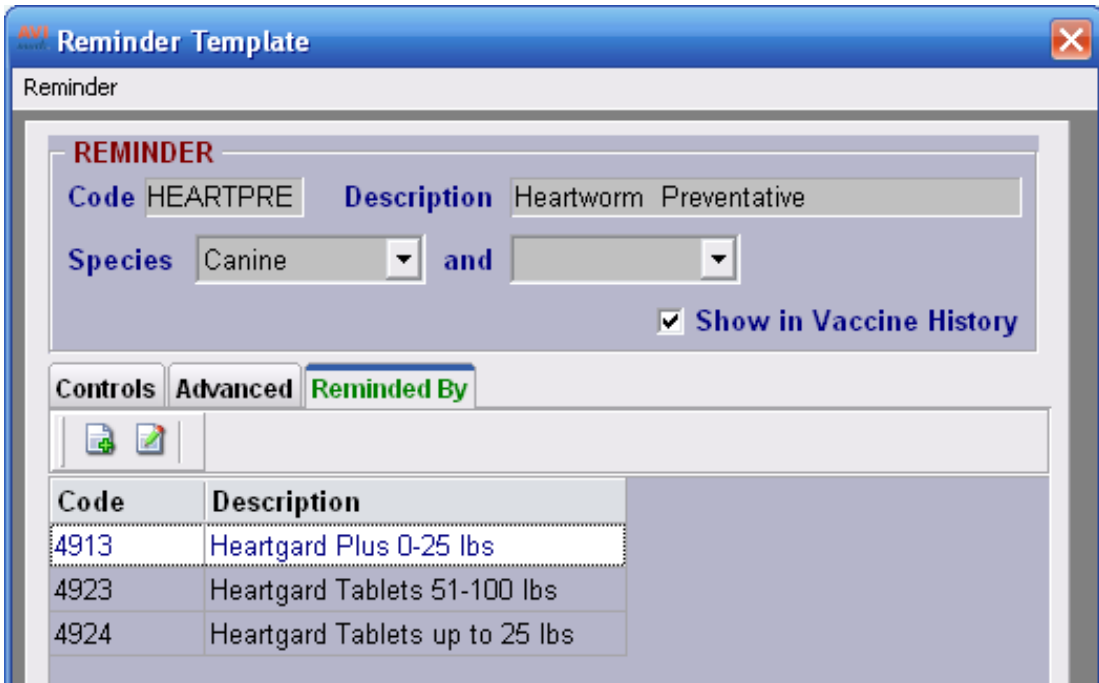
Remind As

The Remind As feature has been greatly enhanced by now allowing unlimited Remind As associations and also enabling the ability to view services that are set to remind as the selected template.

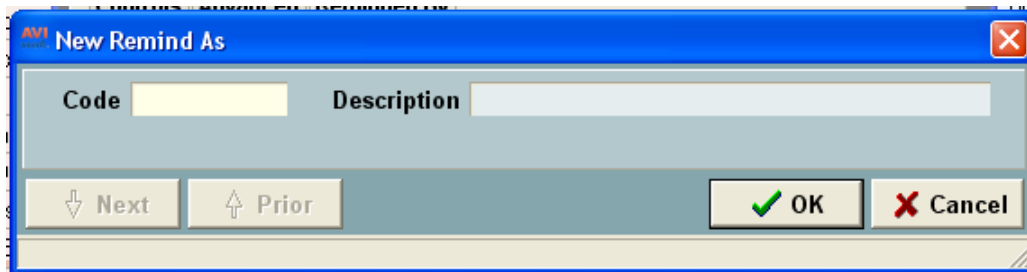
Reminded by Tab in Reminder Template

From the Reminder Template you can now view which treatments, items, diagnosis or problem entries are set to Remind As the selected template.

- From the appropriate list select **right-click, Reminder** on the entry. (i.e. Inventory List, Treatment List)
- Click on the **Reminded By** tab to display services that are set to Remind As this selected template. Once a Remind As is set on the service the entry will automatically be added to the Reminded By tab for the appropriate template.



- To add a Remind As directly from the Reminder Template window choose **right-click, New** while in the Reminded By tab.
 - Enter the **Code** of the service this template is used to remind for.
 - Or tab to the **Description** field and begin typing the description and select the service this template is used to remind for.



- Select **right-click, Remove** to remove the associated entry from the template.

Remind As Tab in Change Window

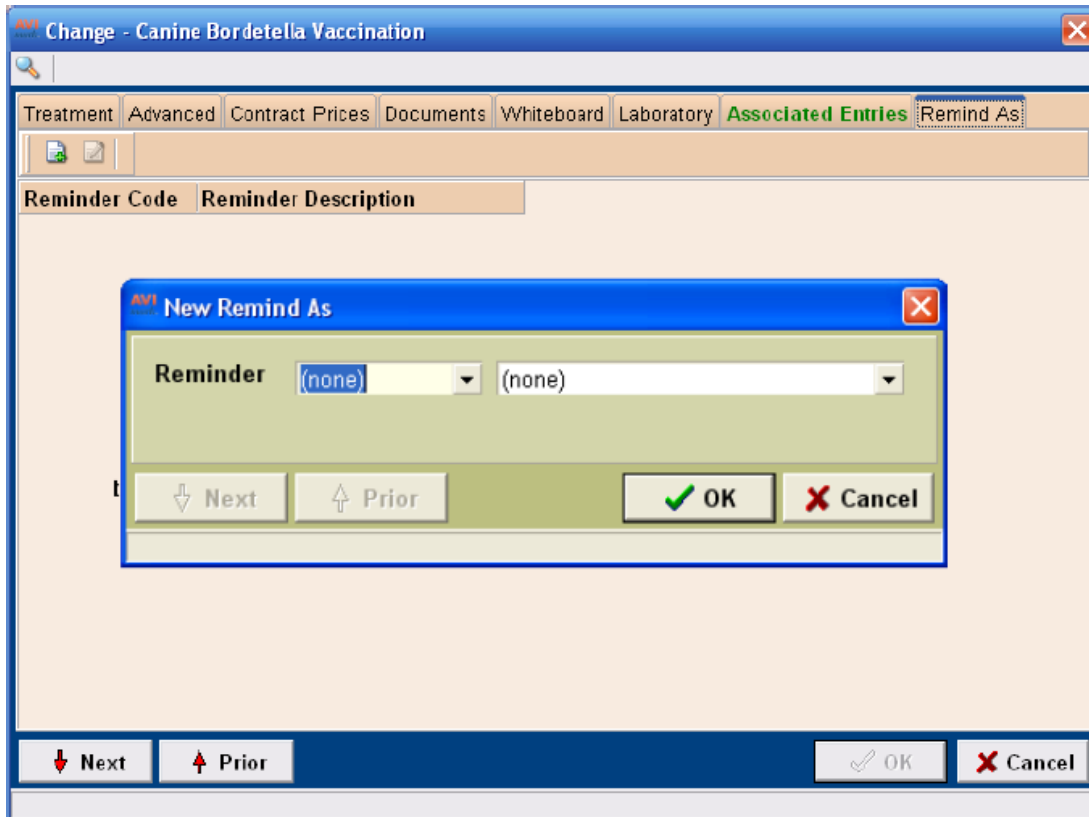
A new Remind As tab has been added to the Change Treatment, Item, Diagnosis and Problem windows. This will allow an unlimited number of remind as entries to be set for a treatment, item, diagnosis or problem.

Adding a Remind As

- From the appropriate list (i.e. Treatment) **right-click, Change** on the service and select the **Remind As**

tab.

- To associate a reminder with this treatment, choose **right-click, New** and from the drop-down list select the Remind As reminder for this treatment.
- Click **OK** to associate the remind as.



NOTE: Before Remind As will reflect within a patient’s reminder window you will first need to rebuild medical history indexes and apply the reminder templates.

Printing Reminder Templates

In order for us to assist you with setting up your reminders in the most efficient way, we recommend that, before you apply your reminder templates, you print them and FAX them to us for review. Templates may be faxed to 573-223-4306.

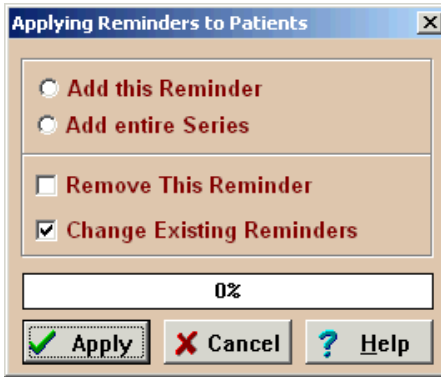
- From the Treatment List, open the **Reminder** menu and click **Print templates** to display the Print Reminder Templates window.
- Using the **Print to** drop down list select the correct printer.
- If applicable, use the **Restrict to** drop down list and select the species you wish to **Restrict to**.
- Click **Print**. To preview the templates on screen, select **Preview** and click **Print**.

Applying a Reminder on a Single Treatment

AVImark gives you the ability to update reminders for all your patients to include the current specifications for the selected treatment.

- From the treatment list, select the treatment that you want to apply the reminder for.
- **Right-click** and from the shortcut menu click **Reminder** to display the reminder template.

- Click **Apply** at the bottom of the reminder template to display the Applying Reminders to Patients window.

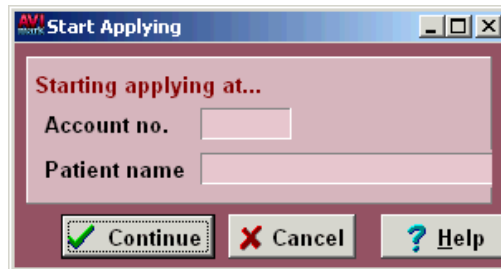


- Select the option which applies to the reminder you are applying. They are:
 - Add this Reminder
 - Add entire Series
 - Remove This Reminder
 - Change Existing Reminder
- Click **Apply** to begin the scheduling process.

Applying Reminders Globally

In addition to having the ability to update reminders individually, AVImark allows you to Update/Apply all your reminders which you have added or changed at one time.

- From the Treatment List, open the **Reminders** menu and click **Apply**.
- You will need to click **Yes** to confirm.



- Click **Continue** to start the scheduling process.

Creating Patient Specific Reminders

AVImark lets you specify the conditions under which you want to remind for any treatment and/or inventory item you select. You do this in what are called Reminder Templates, which are normally set up for each treatment and applied to all patients at once. In addition, AVImark allows you to add or change a reminder from the

?	To learn more about:	Search the Help for:
	Set up a reminder	Reminder template
	Printing reminder templates	Reminder template overview
	Applying reminders	Applying reminders

Patient Area reminder folder. Adjusting the reminder from the folder now makes the reminder specific for this patient.

- From the CID Patient Area Reminder folder, **right-click** and from the shortcut menu click **New** to display the Patient Reminder Template.
- Set up the template appropriate for this patient and click **Done**.

Changing a Patient Reminder Template

When a given reminder is appropriate for certain patients, but due to special circumstances you need to change the reminder template and how it applies to this particular patient.

- In the Reminder folder, **right-click** and from the shortcut menu click **Change** to display the Patient Reminder Template.
- Adjust the template appropriate for this patient and click **Done**.



*When you change the **Due** date, a **Due date set by user** check box will appear to the right of the date indicating that AVImark's calculation has been overridden. The date will display in green on the Reminder folder indicating it is a patient specific reminder. If you need to return to the original date just uncheck the box.*

Purging Reminders

AVImark allows you to purge patient reminders that are due prior to a specific date.

- On the CID, open the **Utilities** menu. Click **Purge Files** to display the Purge System Files window.
- You will need to click **Yes** to confirm.
- Select the **Remove ALL patient reminders** option.
- Select **Keep reminders due after** and use the drop down calendar to select the date.
- Click **Purge**. When the purge process is complete, AVImark will automatically close.

Printing Reminders/Reminder Analysis

When you choose to print all reminders, AVImark will perform the reminder analysis using the values and limitations you have set up in the Reminder Analysis Window. Reminders will be printed for those patients selected as coming due or are overdue for any of the periodic treatments, items or diagnoses you have specified.

- On the CID, open the **Work with** menu. Click **Reminders** to display the Work with Reminders window.

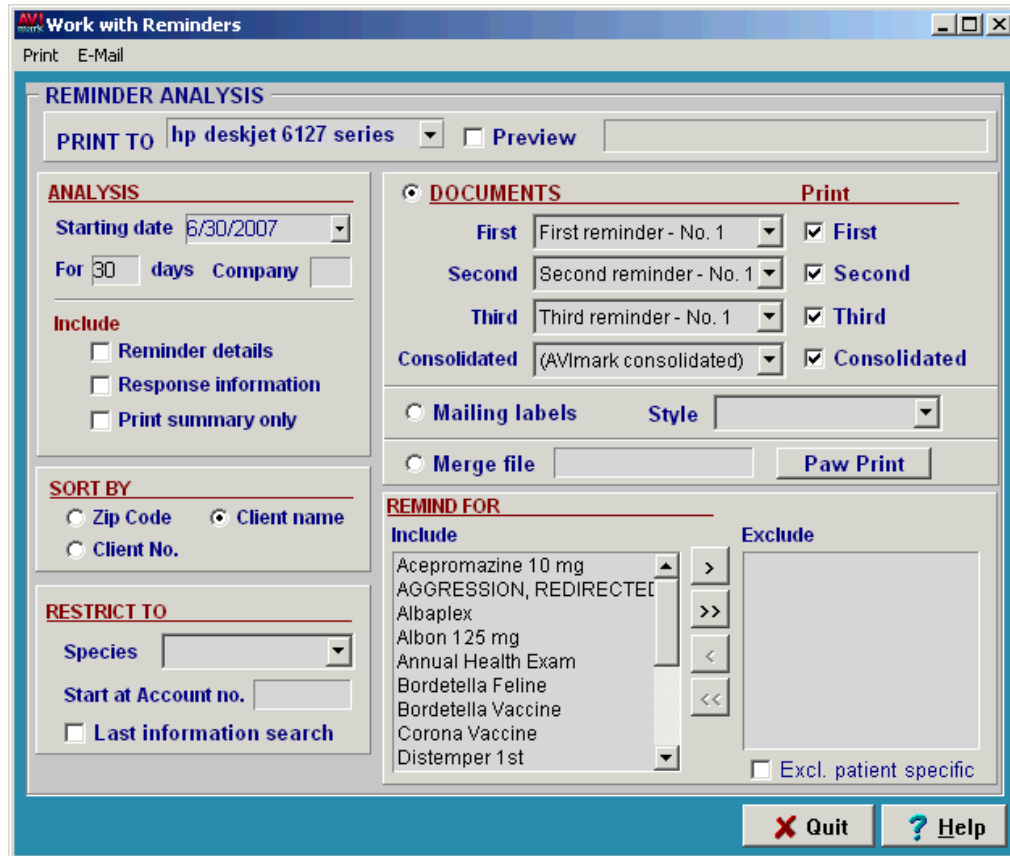
Print To

- Use the **Print to** drop down list and select the correct printer.

Starting date/For

AVImark lets you find patients who are due for remindable treatments during a reminder window of time which you define by setting a start date, then specifying a number of days.

- Using the **Starting date** drop down calendar, select the **start** date and then enter the number of days in the **For** field.



Company

You may limit the printing of reminders to a certain company number.

- If appropriate, type the company number.

Include

This field allows you to tell AVImark what information to include on the analysis report.

- Select the **Reminder details** option to include a list of clients/patients that are due for reminders as well as a summary of the analysis.
- Select the **Response information** option to include response data for the period being analyzed.
- Select the **Print summary only** option to limit the report to a summary of clients/patients due for reminders.

Sort By

This allows you to sort the reminder documents.

- Select the appropriate **Sort by** option.

Restrict To Species

You may limit reminders to a selected species.

- If appropriate, use the **Species** drop down list and select a species.

Start at Account no.

In the event the printing process was interrupted or you are unable to complete the printing once started, you may specify a client account number for the last reminder card that printed and begin printing again.

- If appropriate, type the clients account number to commence printing from that account number forward.

Last information search

Allows you to restrict the printing of reminders using the results of the last information search you ran.

- If applicable, select this option.

Limiting reminders

You may use the check boxes in the **Print** column to limit past due reminders. If you do not want to send second and/or third reminders, you must uncheck both the second and third reminder check boxes. Do not uncheck the first box, you must send at least the first reminder for the period specified in the analysis window.

Mailing labels

You may choose to print mailing labels for your reminder post cards.

- After the reminder cards have printed select **Mailing labels**.
- Using the **Style** drop down menu select the label style.
- Using the **Print** menu, select **Reminders** again to print the labels.

Merge file

AVImark lets you merge reminder information, creating a text file that contains client and patient reminder information. Once merged, this file can be located within the AVImark folder.

- If appropriate, select the **Merge file** option and type a name you would like to give this merge file.
- Using the **Print** menu, select **Reminders** to merge the file.

Reminder Organizations

Healthy Pet[®], Pet Quarterly[®], Paw Print[®], US NetCom[®], Jabez Communications Group[®], or AVImark

AVImark allows you to send the appropriate reminder file(s) to your chosen organization. If you have specified an organization and Clinic ID number in **Hospital Setup, Advanced** AVImark will automatically insert that number in the **Merge file** field for you and display the Healthy Pet[®], Paw Print[®], Pet Quarterly[®], AVImark or Netcom[®] Button.

- Ensure your internet connection has been established.
- As discussed previously, specify the date range that is appropriate for the reminder period.
- Select the **Healthy Pet[®], Pet Quarterly[®], Paw Print[®], US NetCom[®], Jabez Communications Group[®] or AVImark** to send the results to that organization.

MSS Online Reminders®

MSS Online Reminders is a service provided by McAllister Software Systems through the AVImark program. Once this feature is activated and your Clinic ID has been assigned, the Merge File section of Work with Reminders area will contain an AVImark button. Selecting this button will export all appropriate reminders based on the time frame and reminder selections. Once the export is complete, you will be auto-logged into our reminder site where you will have the ability to select the details of your reminder or marketing cards and submit your order. For more information on this service please call 877-838-9273 option 2, sub-option 3 to contact an AVImark Sales representative.

Remind For

You may specify which treatments and/or items to include and/or exclude.

- Select the treatment to include or exclude and use the < or > buttons to move the treatment. To move all at once use the << or >> buttons.

Excl. patient specific

You may exclude Patient specific reminders when excluding other remindable treatments or items.

- If appropriate, select this option.

Printing Reminders


After specifying the appropriate options you are then ready to print the reminders.

- From the **Print** menu select **Just One** to print just one reminder card for the patient currently open on the CID screen.
- From the **Print** menu select **Reminders** to begin printing the reminder cards.

Print Analysis

The analysis report will list those patients who are due for a reminder for the time frame specified. To include detailed information on the report select the desired option under the Analysis window on the Work with Reminders window.

- From the **Print** menu select **Analysis** to print the report

	To learn more about:	Search the Help for:
	Reminder Analysis	Reminder Analysis
	Save/Email the Reminder Analysis	Print-Work with Reminders
	Print Just One Reminder	Printing Reminders

Printing Reminders using AVImark or MS Word®

AVImark allows you to use the regular AVImark Notes window to create reminder text to be printed on post card documents or you may use MS Word® to create your reminder documents. For detailed information on creating reminder text, refer to.

Use AVImark

If you have selected to use AVImark to create your reminders, the reminder names will automatically be inserted in the **First**, **Second** and or **Third Document** fields.

Use MS Word®

- Double click in the **First**, **Second** and or **Third Document** field to display the **Open** window.

- Double click on the document name you intend to use. The same document name must be used for **First**, **Second** and/or **Third** reminder text.

Consolidated

AVImark allows you to print one reminder document per household rather than one per patient. If you intend to print consolidated reminders using MS Word, you must have the **Reminders per page** option in **Hospital Setup** set to **One**.

E-Mailing Reminders

AVImark allows you to send reminder messages via e-mail to those clients who have valid e-mail addresses and own animals that are either due or past due for remindable services. You will do this in two steps; by **printing** reminders for those clients who do not have an e-mail address, and then sending e-mail messages to those that do.

- For those clients with no e-mail address, print reminders using the instructions as previously discussed.
- After printing, open the **E-mail** menu. Point to **Message** and click **First reminder**, **Second reminder**, and/or **Third reminder** to display the **E-mail message** window.
- Type the reminder message you wish to send (you may use all the normal notes window functions when creating the message) and click **Done**.
- On the **E-mail** menu, click **Send**.



To prevent a reminder card from being printed for a client already receiving a reminder via e-mail, you must specify the appropriate e-mail reminder options in Hospital Setup.



To learn more about:
E-mailing Reminders

Search the Help for:
E-mail Reminders

CHAPTER 12: DIAGNOSIS LIST

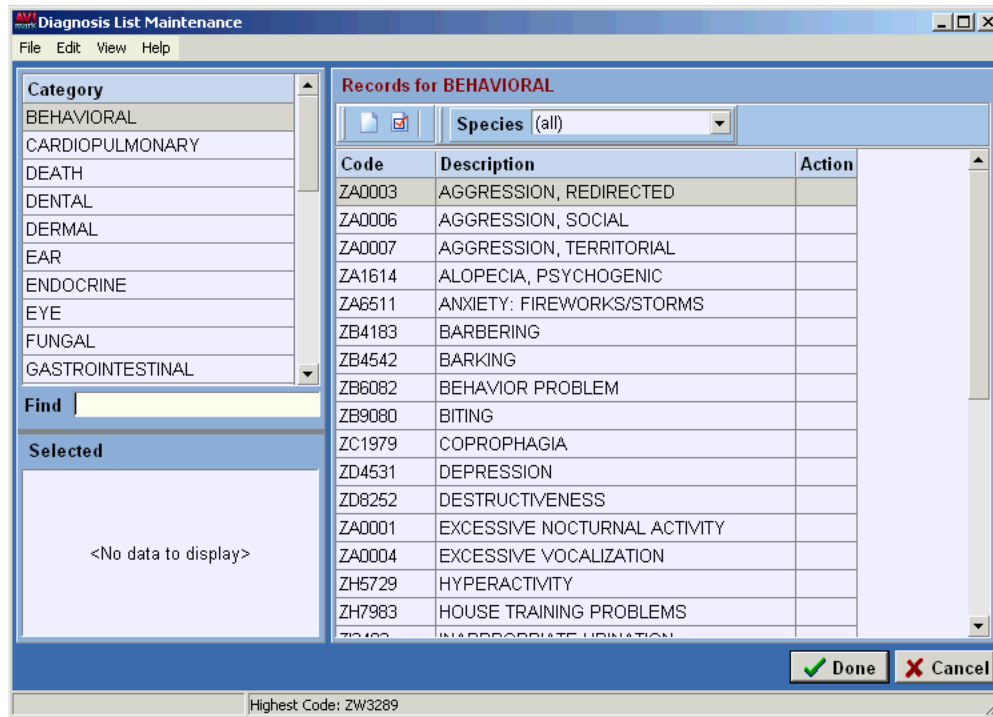
When a particular medical condition or disease is observed in a patient, you may wish to document your findings in AVImark from the CID of the correct patient. You may do this by selecting the appropriate diagnosis from the AVImark Diagnosis List and including it in the Medical History Area of the correct patient. You may also choose the diagnosis as part of the Medical Condition (S.O.A.P.) function.

In this chapter you will learn about...

- » Add a New Diagnosis Category on page 187
- » Add a New Diagnosis on page 188
- » Undo and Redo Options on page 192
- » Use Diagnosis List Shortcut Menu on page 193
- » Create Doctor's Instructions on page 195
- » Include Tag-A-Long Instructions on page 195
- » Specify Doctor's Notes on page 195
- » Enter Recommendation on page 195
- » Sort Your Diagnosis List on page 196
- » Enter a Treatment Protocol on page 196
- » Enter Diagnosis Notes on page 196
- » Sort the Selected Diagnosis on page 196
- » Customizing Columns on page 197
- » Using the Speed Bar Button on page 197
- » Changing Multiple Entries on page 197
- » Previewing Text on page 197

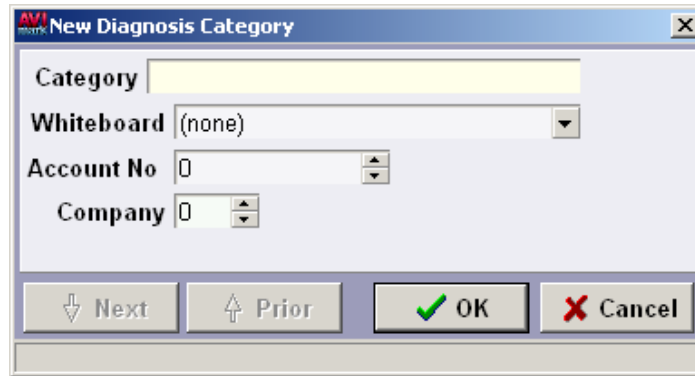
When you start using AVImark you will probably want to add, delete and change the Diagnosis List to customize its different characteristics to suit your clinic.

- On the CID, open the **Work with** menu and click **Diagnosis List** to display the Diagnosis List Maintenance window.



Add a New Diagnosis Category

- From the **Category** section of the **Diagnosis List Maintenance** window, **right-click** and from the shortcut menu click **New** to display the **New Diagnosis Category** window.



Category

This is the descriptive name given to each category to identify it in most AVImark functions.

- Type the name you wish to give the new category.

Whiteboard

This field represents the Whiteboard categories that are set up in “System Tables”. They are used to group and organize diagnoses on the ‘Whiteboard’.

- Use the **Whiteboard** drop-down list and select the Whiteboard category you wish to assign to this category.

Account number

To interface with QuickBooks®, you will need to enter the income account number that you set up in QuickBooks® as the account in which to record the income generated from diagnoses within this category.

- If appropriate, type the income account number that you have set up in QuickBooks®.

Company

Having the ability to assign company numbers to individual codes as well as entire categories allows detailed reporting by company to be much more accurate. This same number can be assigned to multiple diagnoses.

- If appropriate enter the desired company number for reporting purposes.
- Enter the desired information and click **OK**.

Add a New Diagnosis

- With the correct category selected, point in the Records for section.
- **Right-click** and from the shortcut menu click **New** to display the **New Diagnosis** window.
- Once all information has been entered click **OK**.

Diagnosis Tab Values

Code

You may use up to 8 characters, using numbers, letters or a combination of both. AVImark will not allow you to use a code that has already been assigned somewhere else in the program.

- Type the Diagnosis Code.

Description

This is the description that will appear on the patient charts and reports that concern the medical history of the patient.

- Type the Diagnosis Description.

Action Codes

These codes cause AVImark to perform a certain function.

- If applicable, use the drop-down list and select the Action code(s) for this diagnosis. You may select up to 6 different codes for each diagnosis.

The following lists the Action Codes and their meaning:

CODE	NAME	EXPLANATION
A	Automatic drug label prompt	Prompts the drug label window to display when the diagnosis is entered into medical history.

D	Diagnosis causes death	Automatically marks the patient as deceased when the diagnosis is entered into medical history.
E	Print one document/patient	Prompts a document for each patient that has received the same diagnosis in medical history for a client.
F	Include on travel sheet	Includes this service on the travel sheet that can be printed through AVImark.
I	Include on Invoice	Includes this diagnosis on the printed invoice.
K	Prompt to include in group	When included within a treatment group this action code will prompt you if you would like to enter the diagnosis in medical history.
O	Don't include on Health Summary	Prevents the diagnosis from being printed on the Health Summary area of the patient chart.
Q	Don't post to invoice	Will not include this diagnosis on the printed invoice. This diagnosis will be entered in medical history and displayed as already posted.
W	Auto prompt for vital signs	Automatically prompts for the Medical Condition Record (SOAP) to display when this diagnosis is entered into medical history.
X	Causes sex alteration	Automatically updates the patient's sex to spayed, neutered or gelded depending on the previous sex and species of the patient.
Z	Dietary item	Includes this diagnosis on the dietary tab at the bottom of the CID screen.
-	Obsolete diagnosis	Marks a diagnosis as obsolete and grays it out on the list. When trying to add this service to medical history you will be warned that it is an obsolete diagnosis.
@	Auto prompt for document	Prompts to print the linked document. Without this action code AVImark will automatically print the linked document with the invoice.
*	Auto prompt for notes	When entered into medical history it will automatically prompt for a notes window to enter information about the diagnosis.
?	Schedule follow-up at posting	This action code will display the follow-up window when posting instead of when the diagnosis is entered into medical history.
>	Don't print notes on chart	Will not include the entered medical history notes on the printed patient chart.
%	Auto copy notes into medical history	Copies entered notes on the diagnosis automatically into a notes window in medical history.
~	Auto hide notes in medical history	Will not display the entered medical history notes on the CID screen.
[Auto prompt for the microchip number	Automatically prompts for the patient's microchip number and will enter the number into the patient's area of the CID screen.
#	Don't print form/document	Suppresses the printing of the linked form or document.
{	Auto prompt for the locator number	This action code will prompt for a number to be used with ePetRecords®.
}	Don't post from Whiteboard	When posting diagnoses from the whiteboard this action code will not post the diagnosis to medical history.

<	Include on the E-Travel sheet	Includes this diagnosis on the electronic travel sheet.
2	Show Notes in Medical History	This action codes allows you to view specific notes with the option selected of “Show all with note action” in medical history.
5	Dental Assessment	Automatically prompts the dental chart to display when the diagnosis is entered into medical history.

Work List Codes

Any given diagnosis may be assigned up to 3 Work List codes. When the diagnosis is recorded in the Medical History for the patient, that patient will automatically be placed on the specified list(s).

- If appropriate, use the drop-down list to specify the Work List code(s).

Remind As

AVImark lets you remind for any diagnoses in the same way you remind for services and inventory items. Accordingly, if several diagnoses have similar reminding characteristics you only have to set up a template for one of them and then choose that diagnoses code in this field and the description of that entry will be displayed.

- Using the drop-down list select the code from the reminders that exist. If you do not know the code of the diagnosis with a reminder you may use the second field drop-down list for a list of descriptions to choose from.

Photo

AVImark allows you to link any .bmp; .jpg; or .tif image to the diagnosis to be printed on the client invoice. If there are no take-home instructions linked with the diagnosis, the photo will not be printed.

- Select the browse button in the **Photo** field to display the **Open** window.
- Double-click on the photo you wish to attach.

Form

AVImark allows you to designate a default Form that is to be used for any diagnosis.

- Select the browse button in the **Form** field to display the **Open** window.
- Double-click on the form you wish to attach.

Protocol

You may specify an MS Word document that serves the purpose of defining a treatment protocol.

- Select the browse button in the **Protocol** field to display the **Open** window.
- Double-click on the document you wish to attach.

Search Words

AVImark allows you to specify search words that you will be able to search for to find this diagnosis either from the **Enter Medical History** window, **Whiteboard Activity Entry** window, or Medical Condition Record by typing any of these Search words in the description field or from the **Diagnosis List Maintenance** window using the **Find** field.

- Type the search word(s), separated by commas, in the **Search Words** field or use the browse button and type the search word(s) in the **Add Search Words** window.

Category

AVImark automatically displays the category this diagnosis belongs to. You may also change and/or move the diagnosis to a different category.

- Using the drop-down list select the category you wish to move the diagnosis to.
- If the diagnosis has already been saved, you may also **right-click** on the diagnosis and from the shortcut menu click **Move**.
- You will need to click **Yes** to confirm and select the category to move to.

Species 1 and Species 2

You may specify which species (if any) this diagnosis is appropriate for. If no species needs to be specified for this diagnosis, simply leave these fields set to **(none)** and the diagnosis will be considered appropriate for any species.

- If appropriate, use the drop-down list to select the species.

Follow-up

You may specify the values that will determine how patients receiving the selected diagnosis will be handled by the AVImark Follow-up function. AVImark will log the client and patient onto the Follow-up List whenever this diagnosis is recorded in the Medical History area.

- Using the UP and DOWN ARROWS, specify the number of days.

Critical

You may indicate whether the follow-up callback is considered of an urgent nature.

- If appropriate, select this box.

Subject

Entering a follow-up for the diagnosis will automatically place the diagnosis name in this field. You may if you wish to, assign a different Subject or reason for a call back to this Follow-up.

- To change the Subject to something other than the default diagnosis name, remove the default name from this field and type the description you want to change it to.

Company

Having the ability to assign company numbers to individual codes as well as entire categories allows detailed reporting by company to be much more accurate. This same number can be assigned to multiple items.

- If appropriate enter the desired company number for reporting purposes.

Undo and Redo Options

AVImark allows you to Undo and/or Redo any changes that have been made in the Diagnosis List.

- Open the **Edit** menu and click **Undo** or **Redo**.

Document Tab Values

AVImark allows you to associate an MS Word® document or Star Office® document with a diagnosis. These documents can also be species specific. You can print this document at the time it is entered into the medical history of the patient by using the @ Action Code or at the time the invoice is printed.

- To enter the document name, **right-click** and from the shortcut menu click **New** to display the New Diagnosis Species Entry window.

- Use the **Species** drop-down list and select the appropriate species for the document.
- Select the browse button in the **Document** field to display the **Open** window.
- Select the appropriate document and click **OK**.
- Repeat the same procedures for the multiple species.

Use Diagnosis List Shortcut Menu

In the Diagnosis List window there are other features found in the shortcut menu. Click the right mouse button (called **right-click**) to see the shortcut menu.

Add a duplicate diagnosis

AVImark allows you to add a new diagnosis to your list that is a duplicate of one that you have already entered. This will be useful if you are adding several diagnoses that have the same characteristics.

- From your Diagnosis List, select the diagnosis you wish to duplicate.
- **Right-click** and from the shortcut menu click **Another** to display a duplicate New Diagnosis window.
- Enter a new **Diagnosis Code** for the duplicate diagnosis as well as any other necessary changes and click **Done**.

Select

Select diagnosis to be added to medical history, an Estimate, a SOAP Record or Whiteboard.

- With the correct diagnosis selected, **right-click** and from the shortcut menu click **Select** or press the **Spacebar**.
- Diagnosis will be added to the **Selected** area.

Edit Changes

Use the Edit menu to select diagnosis or to undo or redo changes to an diagnosis.

View

From the View shortcut menu you can Refresh the window, customize columns, view the Entry History for this diagnosis, Preview or Hide text associated with the diagnosis or you can choose how to sort the window.

Entry History

Use this option to view a history of changes made to the selected diagnosis.

- Select a diagnosis and choose **right-click View, Entry History**.
- View date and time change was made, logged in user who made the change and a description of the change that was made.
- Click **Done** to close the window.

Move diagnosis to another category

You can easily move diagnosis from one category to another.

- With the correct diagnosis(es) selected, **right-click** and from the shortcut menu click **Move**.
- You will need to click **Yes** to confirm the move.
- Click the appropriate category name to move the diagnosis to.

Doctor's Notes

Use the doctor's notes window to enter doctor's protocol for handling this diagnosis. These notes will not print. To view these notes you must return to the Diagnosis List and view the notes on the specific diagnosis.

- With the correct diagnosis selected, **right-click** and from the shortcut menu click **Doctor's Notes**.
- Enter the appropriate notes and click **Done**.

Instructions

You may attach take-home instructions to any item to be printed automatically on the client invoice. To learn more about instructions refer below to the next topic "*Create Doctor's Instructions*".

Recommendations

You may use this notes window to enter information regarding the treatment of this diagnosis. To learn more about entering recommendations refer to the topic "*Enter Recommendations*" on page 189.

Reminder

AVImark allows you to set up a reminder template for any item. For a detailed discussion on setting up Reminder Templates, refer to "*CHAPTER 11: REMINDERS*".

- With the correct diagnosis selected **right-click** and from the shortcut menu click **Reminder**.
- You will need to click **Yes** to create one and display the Reminder Template.
- Specify the various conditions for the reminder and click **Done**.

Treatment Protocol

Use this menu option to attach recommended treatment protocols. To learn more about treatment protocols refer to the topic "*Enter a Treatment Protocol*" on page 189.

Whogot

The AVImark Whogot list is a sorted list of all patients and their owners that have received a specified diagnosis. Use the Whogot list to view, sort, print, or go to the CID of any patient receiving the chosen diagnosis in a specified number of months.

- With the appropriate item selected, **right-click** and from the shortcut menu click **Whogot** to display the Treated Patients window.
- If applicable, use the **Criteria** menu to sort and/or limit the number of patients selected.
- Click **Done** to return to the Treated Patients window.
- Select the individual patients from the list you wish to print by clicking on the patient name and press the SPACEBAR.
- Click **Print** to display the Print Whogot window.
- Use the **Print to** drop-down list and select the correct Printer.
- Using the **Months to show** field, enter the number of months to display or use the drop-down calendar to specify the period you wish to print for.
- If applicable, double-click in the **Document** field to select a Document from among your MS Word documents.
- Select **Include notes** to include the notes about the diagnosis selected for each patient on the list.
- To omit the prescription messages, check the **Exclude scripts** checkbox.
- If applicable, click on **Restrict to last query** to limit the printing of documents to only those patients

chosen when you ran the last information search.

- Click **Print** or to preview the report onscreen select **Preview** and click **Print**.

Create Doctor's Instructions

You may attach take-home instructions to any diagnosis to be printed automatically on the client invoice. For more information on entering doctor's instructions, refer to "*CHAPTER 30: NOTE GLOSSARY AND Q & A*".



- Choose the correct diagnosis. **Right-click** and from the shortcut menu click **Instructions** to display the Invoice Instructions window.
- Type the doctor's take-home instructions. All of the AVImark note feature options are available in this window.
- Click **Done** to save the instructions.

Include Tag-A-Long Instructions

- If you have several diagnoses in your list that would normally have similar Doctor's Instructions, you may "duplicate" the instructions without having to type them all over again for every similar diagnosis. For detailed information on using tag-a-long instructions, refer to "*CHAPTER 30: NOTE GLOSSARY AND Q & A*". Type the Doctor's Instructions in the normal way for one of the diagnoses.
- Select any other diagnosis that you want to use the same instructions for. **Right-click** and from the shortcut menu click **Instructions**.
- Type the Diagnosis Code of the *parent* diagnosis enclosed in asterisks (e.g. *ZB4542*) and click **Done** to save.

Specify Doctor's Notes

- AVImark lets you specify your own observations, notes and memos about any of the diagnoses for future reference. These notes will not be displayed on the patient chart or the invoice unless you assign the % Action Code. For detailed information on entering notes, refer to "*CHAPTER 30: NOTE GLOSSARY AND Q & A*". With the correct diagnosis selected **right-click** and from the shortcut menu click **Doctor's Notes** to display the Doctor's Notes window.
- Enter the doctor's notes using all the normal AVImark note feature options and click **Done**.

Enter Recommendations

You may use this notes window to enter information regarding the treatment of this diagnosis. These recommendations are displayed by AVImark for your reference when using the AVImark Medical Condition function.

- With the correct diagnosis selected **right-click** and from the shortcut menu click **Recommendations** to

display the Recommendations window.

- Enter the recommendations using all the normal AVImark note feature options and click **Done**.

Sort Your Diagnosis List

You may sort the list of diagnosis on a category basis by Code, Description, or by Action Code.

- Choose the correct category you wish to sort.
- Sort the records for that category by clicking on **Code**, **Description**, or **Action Codes** in the title bar. You may also move the diagnosis by highlighting it and while holding down on the left mouse button, drag to the specified location.



Remind for a Diagnosis

AVImark allows you to remind for any diagnosis in the same manner you remind for treatments and/or inventory items.

- With the correct diagnosis selected **right-click** and from the shortcut menu click **Reminder** to display the Reminder Template window. If a template is not found you will need to click **Yes** to create one.
- Set up the reminding characteristics in the same manner as you do with services.

Enter a Treatment Protocol

AVImark allows you to enter a recommended treatment Protocol for any diagnosis.

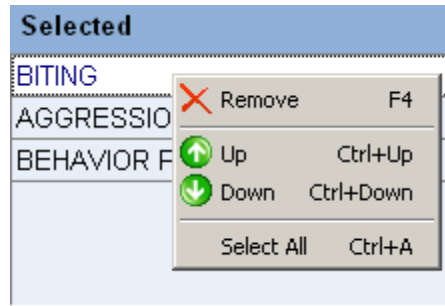
- With the correct diagnosis selected **right-click** and from the shortcut menu click **Treatment Protocol** to display the Treatment Protocol window.
- From the Treatment Protocol window, **right-click** and from the shortcut menu point to **Choose** and click either **Treatments** or **Items** to display the appropriate list.
- Select the appropriate treatment and/or inventory item and click **Done**.
- Click **Recommendations** to enter notes concerning the treatment and click **Done**.

Enter Diagnosis Notes

- You may enter unlimited notes regarding a diagnosis in the Medical History area. For detailed information on entering notes, refer to “CHAPTER 30: NOTE GLOSSARY AND Q & A”. With the appropriate Medical History entry selected, **right-click** to display the shortcut menu.
- Point to **Notes** and click **Enter Notes**.
- Enter the notes using all the normal AVImark note feature options and click **Done**.

Sort the Selected Diagnosis

AVImark allows you to sort selected diagnosis entries before they are entered into a patient’s Medical History.





- From the **Selected** area in the Diagnosis List Maintenance window, **right-click** and from the shortcut menu use the **Up** or **Down** arrows to arrange the diagnosis.

Customizing Columns

The Columns in the Diagnosis List Maintenance window can be arranged in the order you would like them to appear. For detailed information on customizing columns, refer to “*CHAPTER 32: CUSTOMIZING COLUMNS*”.

Using the Speed Bar Buttons

Just beneath the Records for the Diagnosis List are two Speed-bar icons. If you rest the mousearrow on a speed-bar button, a ‘hint’ window will open describing its function.

- **Page icon**  – Use this button to add a **New** diagnosis to the list.
- **Page with Checkmark icon**  – Use this button to **Change** a diagnosis entry.

Changing Multiple Entries

AVImark allows you to change multiple entries within the Diagnosis List.

- Using the SHIFT and ARROW keys, select the appropriate entries. **Right-click** and from the shortcut menu click **Change** to display the Change window of the first selected entry.
- Make the necessary changes and click **OK**.

Previewing Text

You may display notes, instructions and recommendations in the Diagnosis List window.

- Within the Records for section, **right-click** to display the shortcut menu. Point to **View** and click **Preview Text** to display a **Columns** window.
- Select **Show Preview Text** and from the grid choose the option you would like to display.
- Click **OK**.



To learn more about:
 Working with Diagnosis

Search the Help for:
 Diagnosis; Table of Contents – Diagnosis List

CHAPTER 13: PROBLEM LIST

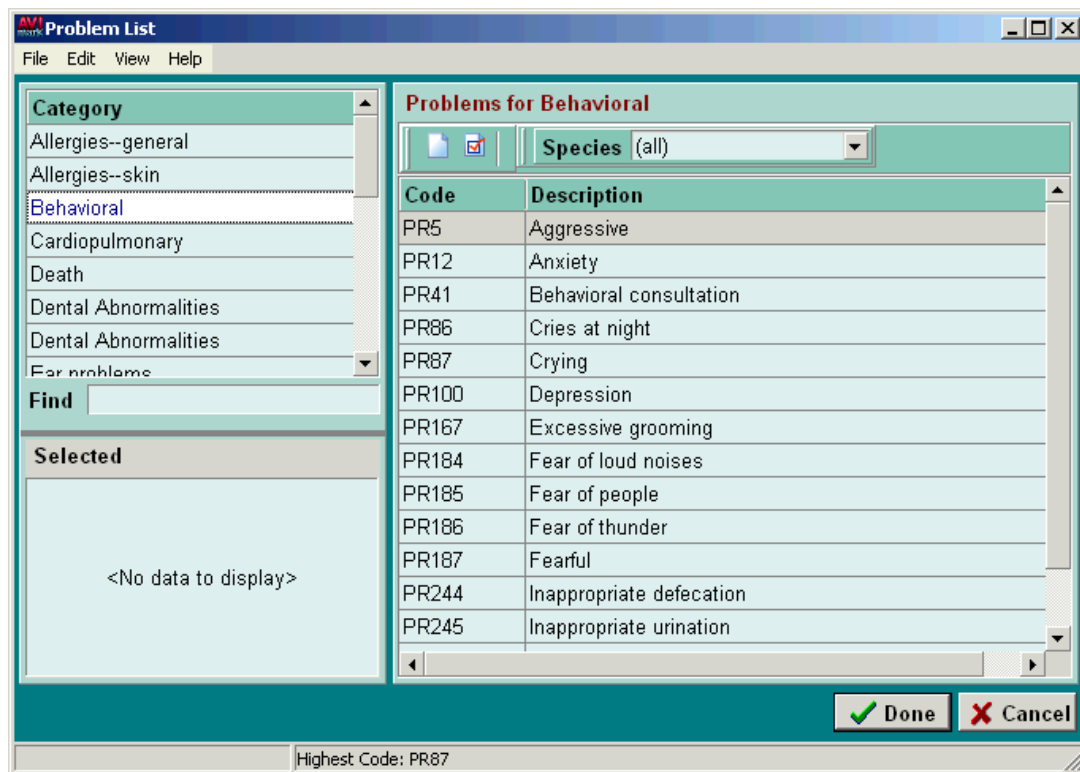
The Problem List identifies problems that patients may encounter during their lifetime. You may have as many categories and problems entries as you wish. A patient problem may be added directly to the patient's Medical History and the problem will be displayed in bold GREEN indicating it is a Problem and has not been posted to accounting. From Medical History, these problems may then be SOAP-ed; included within the Medical History section of a Patient Chart; added to Whiteboard as a scheduled activity; have attached photos, documents, forms, and file attachments.

In this chapter you will learn about...

- » Creating your Problem List on page 199
- » Adding a Duplicate Problem on page 201
- » Selecting Problem on page 202
- » Editing Changes on page 202
- » Sorting and Printing the Problem List on page 203
- » Attaching Diagnostic Protocol on page 204
- » Changing Quantity Values on page 204
- » Entering Rule-Out on page 204
- » Customizing Columns on page 205
- » Using Problem List Speed Bar Button on page 205
- » Changing Multiple Entries on page 205
- » Previewing Text in the Problem List on page 205

Creating your Problem List

When you start using AVImark you might want to add, delete and change the Problem List to customize its different characteristics to suit your clinic. To work with the Problem List, use the Work with menu and select **Problem list**.



Add a New Problem Category

- From the **Category** section, right-click and from the shortcut menu click **New** to display the New Problem Category window.
- Enter the appropriate information and click **OK**.

Category

This is the descriptive name given to each category to identify it in most AVImark functions.

- Type the name you wish to give the new category.

Whiteboard

This field represents the Whiteboard categories that are set up in “System Tables”. They are used to group and organize problems on the ‘Whiteboard’.

- Use the **Whiteboard** drop-down list and select the Whiteboard category you wish to assign to this category.

Account number

To interface with QuickBooks, you will need to enter the income account number that you set up in QuickBooks as the account in which to record the income generated from problems within this category.

- If appropriate, type the income account number that you have set up in QuickBooks.

Company

Having the ability to assign company numbers to individual codes as well as entire categories allows detailed reporting by company to be much more accurate.

This same number can be assigned to multiple problems.

- If appropriate enter the desired company number for reporting purposes.

Add and work with a new Problem

- With the correct category selected, point in the **Problems for** section.
- Right-click and from the shortcut menu click **New** to display the New Problem window.

The screenshot shows the 'AVI New Problem' dialog box. The 'Problem' tab is active, showing the following fields and values:

- Category:** Behavioral
- Code:** (NONE)
- Description:** (empty text box)
- Action Codes:** (empty dropdown)
- Species:** (none) (two dropdowns)
- Whiteboard:** (none)
- Company:** 0

At the bottom of the dialog are four buttons: 'Next', 'Prior', 'OK', and 'Cancel'.


Problem Tab Values

- Using the **Category** drop-down menu, select the category you wish to move the problem to.
- Enter a **Code**.
- Type the problem **Description**.
- If applicable, use the **Action Codes** drop-down list and select the correct Action Code(s).

CODE	NAME	EXPLANATION
E	Print one document/patient	Prompts a document for each patient that has received the same problem in medical history for a client.
Q	Don't post to invoice	Will not include this problem on the printed invoice. This diagnosis will be entered in medical history and displayed as already posted.
*	Auto prompt for notes	When entered into medical history it will automatically prompt for a notes window to enter information about the problem.
@	Auto prompt for document	Prompts to print the linked document. Without this action code AVImark will automatically print the linked document with the invoice.
%	Auto copy notes into medical history	Copies entered notes on the problem automatically into a notes window in medical history.
#	Don't print form/document	Suppresses the printing of the linked form or document.
}	Don't post to Whiteboard	Will not include this service on the whiteboard automatically when entered into medical history.
5	Dental Assessment	Automatically prompts the dental chart to display when the problem is entered into medical history.
<	E-Travel Sheet	Include on E-Travel Sheet, action code to display the selected problem on the E-Travel sheet.

- If applicable, use the **Species** drop-down list and select the correct Species.
- If applicable, use the **Whiteboard** drop-down list and select the appropriate category.
- For detailed reporting by company number, enter the appropriate number for this problem.

Document Tab Values

- If you wish to assign a document(s) to the problem, select the Documents tab.
- Use the  button in the **Document** field to view your documents.
- If applicable choose the appropriate species for the document.
- Select the appropriate document(s) and click **OK**

Adding a Duplicate Problem

AVImark allows you to add a new problem to your list that is a duplicate of one that you have already entered. This will be useful if you are adding several problems that have the same characteristics.

- From your Problem List, select the problem you wish to duplicate.
- Right-click and from the shortcut menu click **Another** to display a duplicate New Problem window.
- Enter a new **Problem Code** for the duplicate item as well as any other necessary changes and click **Done**.

Selecting Problems

Select problems to be added to medical history, Appointments, Estimates, SOAP records or to the Whiteboard.

- With the correct problem selected, right-click and from the shortcut menu click **Select** or press the **Spacebar**.
- Problems will be added to the **Selected** area.

Editing Changes

Use the Edit menu to select problems or to undo or redo changes to an problem.

View

From the View shortcut menu you can Refresh the window, customize columns, view the Entry History for this problem, Preview or Hide text associated with the problem or you can choose how to sort the window.

Entry History

Use this option to view a history of changes made to the selected problem.

- Select a problem and choose right-click **View, Entry History**.
- View date and time change was made, logged in user who made the change and a description of the change that was made.
- Click **Done** to close the window.

Move a problem from one category to another

If appropriate you may move the problem to a different category.

- Select a problem and choose right-click, **Move**.
- You will need to click **Yes** to confirm the move.
- Click the appropriate category name to move the item to.

Enter problem notes

You may enter notes regarding a specific problem using all of the available AVImark note feature options.

- With the correct problem selected, right-click and from the shortcut menu click **Notes** to display the Notes window.
- Type the appropriate notes for this problem. All of the AVImark notes feature options are available in this window.
- Click **Done** to save the notes.

Set up a problem reminder

AVImark allows you to set up a reminder template for any problem. For a detailed discussion on setting up Reminder Templates, refer to “*CHAPTER 11: REMINDERS*”.

- With the correct problem selected right-click and from the shortcut menu click **Reminder**.
- You will need to click **Yes** to create one and display the Reminder Template.
- Specify the various conditions for the reminder and click **Done**.

Diagnostic Protocols

Use this menu to associate treatment protocols to determine the cause of the selected problem. To learn more about associating diagnostic protocols, refer to the topic “*Attach Diagnostic Protocols*” on page 196.

Rule-outs

Use this menu to choose possible rule-outs that could be causing the problem. To learn how to choose rule-outs for the selected problem refer to the topic, “*Enter Rule-Outs*” on page 196.

View and print the Whogot list

The AVImark Whogot list is a sorted list of all patients and their owners that have received a specified problem. Use the Whogot list to view, sort, print, or go to the CID of any patient receiving the chosen problem in a specified number of months.

- With the appropriate problem selected, right-click and from the shortcut menu click **Whogot** to display the Treated Patients window.
- If applicable, use the **Criteria** menu to sort and/or limit the number of patients selected.
- Click **Done** to return to the Treated Patients window.
- Select the individual patients from the list you wish to print by clicking on the patient name and press the SPACEBAR.
- Click **Print** to display the Print Whogot window.
- Use the **Print to** drop-down list and select the correct Printer.
- Using the **Months to show** field, enter the number of months to display or use the drop-down calendar to specify the period you wish to print for.
- If applicable, double-click in the **Document** field to select a Document from among your MS Word documents.
- Select **Include notes** to include the notes about the item selected for each patient on the list.
- To omit the prescription messages, check the **Exclude scripts** checkbox.
- If applicable, click on **Restrict to last query** to limit the printing of documents to only those patients chosen when you ran the last information search.
- Click **Print** or to preview the report onscreen select **Preview** and click **Print**.

Sorting and Printing the Problem List

Sort the Problem List

You may sort the list of problems on a category basis by Code or Description.

- Choose the correct category you wish to sort.
- Sort the records for that category by clicking on **Code** or **Description** in the title bar. You may also move the diagnosis by highlighting it and while holding down the left mouse button, drag to the desired location.

Print the Problem List

The Problem List Report shows a list of problems, sorted by category and any associated Microsoft Word document attached to the problem.

- From the Problem List window, open the **File** menu and click **Print** to display the Print Problem List window.
- Use the Category drop-down list to select the category you would like to print.
- Select the **Print details** options to include any associated diagnostic protocols, rule-outs, diagnostic protocol recommendations and any notes.
- Select the **Sort By** option you would like.

Problem List

- If applicable, use the **Restrict to Species** drop-down list to restrict to a certain species.
- Click **Print** or to preview the report on screen, click **Preview**.

**To learn more about:**

E-mail Problem List Report
Attach Documents

Search the Help for:

E-mailing Reports
Associating documents

Attaching Diagnostic Protocols

A diagnostic protocol is composed of the treatments and/or inventory items that will be performed and/or administered to determine the cause of the problem. A diagnostic protocol may be attached to a Problem by choosing the treatments and/or items from the Treatment or Inventory List.

- With the correct problem selected, right-click and from the shortcut menu click **Diagnostic Protocol** to display the Diagnostic Protocol window.
- From the Diagnostic Protocol window, right-click to display the shortcut menu. Point to **Choose** and click either **Treatments** or **Items** to display the list window.
- Select the appropriate treatments and/or items and click **Done** to enter the selection into the Diagnostic Protocol window.
- Click **Recommendations** to enter any further diagnostic procedures and click **Done**.

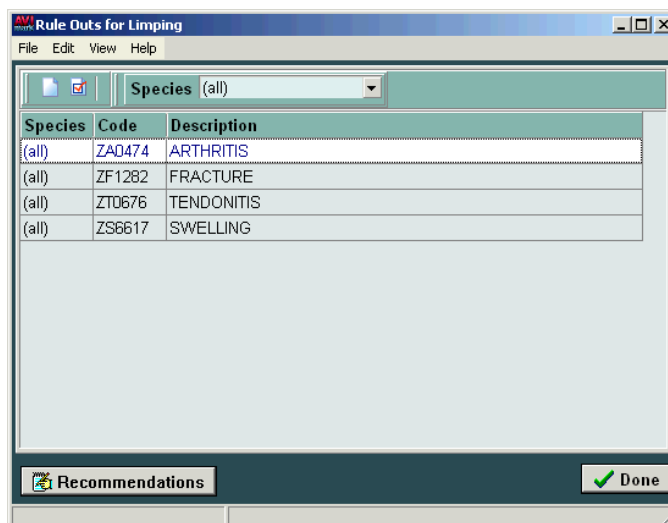
Changing Quantity Values

When you add treatments or items into the Diagnostic Protocol window, you may define Quantity values for these treatments/items. The **Quantity** value normally refers to the number of inventory items the patient needs to receive.


- Within the Diagnostic Protocol window, select the treatment/item to change.
- Right-click and from the shortcut menu click **Change** to display the Change Diagnostic Protocol window.
- Type in the field to change the quantity as needed.
- Click **OK** when finished.

Entering Rule-Outs

Rule-outs are the one or more diagnoses (diseases) that could be causing the problem. When a problem is entered into a Medical Condition (SOAP) record, AVImark allows you to review and accept these Rule-outs in the SOAP record.



- Choose the particular problem. Right-click and from the shortcut menu click **Rule-outs** to display the Rule-outs window.
- Within the Rule-outs window, right-click to display the shortcut menu. Point to **Choose** and click **Diagnosis** to display the Diagnosis List Maintenance window.
- Select the appropriate diagnosis and click **Done** to enter the diagnosis into the Rule-outs window.



	To learn more about:	Search the Help for:
	Rule-Outs	Rule-Outs
	Presenting Problems	Presenting Problems

Customizing Columns

The Columns in the Problem List window can be arranged in the order you would like them to appear. For detailed discussion on customizing columns, refer to “*CHAPTER 32: CUSTOMIZING COLUMNS*”.

Using Problem List Speed Bar Buttons

Just beneath the Problems for the Problem List, are two Speed-bar icons. If you rest the mouse arrow on a speed-bar button, a “hint” window will open describing its function.

- **Page Icon**  – Use this button to add a **New** problem to the list.
- **Page with Checkmark icon**  – Use this button to **Change** a problem entry.

Changing Multiple Entries

AVImark allows you to change multiple entries within the Problem List.

- Using the SHIFT and ARROW keys, select the appropriate entries. Right-click and from the shortcut menu click **Change** to display the Change window of the first selected entry.
- Make the necessary changes and click **OK**.

Previewing Text in the Problem List

You may display notes and recommendations in the Problem List window.

- Select **Show Preview Text** and the option you would like

CHAPTER 14: MEDICAL CONDITION RECORD

AVImark allows you to link a Medical Condition Record with any treatment in the Medical History Area. Data entered in this window will then appear on the printed patient's chart.

In this chapter you will learn about...

- » Medical Condition Options on page 207
- » Work with the Objective Area on page 211
- » Work with Client Instructions on page 211
- » Work with the Assessment Area on page 211
- » Work with the Plan Area on page 212
- » Work with Attachments on page 213
- » Print Patient Report Card on page 213
- » Create Additional Data Fields on page 214
- » Print Medical Condition Record on page 214
- » Graph Vital Signs Data on page 214

Medical Condition Options

The Medical Condition window consist of several different scrollable sections but the four main sections are; Problems, Assessment, Plan and Attachments.

Open the Medical Condition window

- Select the correct treatment in medical history. **Right-click** and from the shortcut menu click **Med condition** to display the Medical Condition window.
- You will need to click **Yes** to confirm.

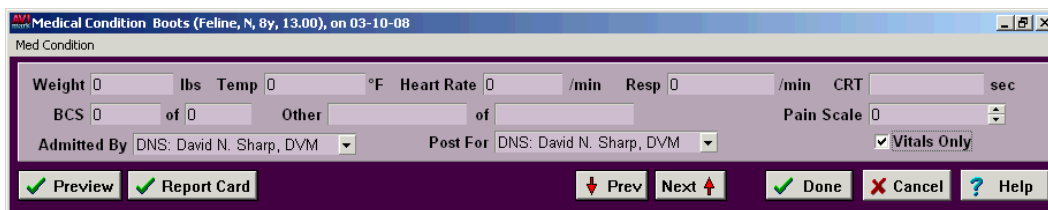
Create the Medical Condition Record automatically

AVImark allows you to automatically create a Medical Condition Record when a treatment is entered into Medical History and also when a patient is checked into the hospital. You will need to be certain that the treatment(s) you are entering into Medical History contain the **W** Action code.

- Select the **Advanced** tab in Hospital Setup and click **Advanced Options**.
- In the search field type **Show Medical Condition Record** and set the default value to **True**.
- In the search field type **Post visit to Medical History** and set the default value to **True** and click **Done**.

Vitals Only Option

For hospitals that only use the weight and vitals section of a SOAP record, it is possible to simply abbreviate the SOAP record by selecting the **Vitals Only** option. With the Vitals Only option checked the SOAP window will default to the abbreviated size when opened and can not be manually resized. Also, while the option remains checked only the vital signs will print on the patient chart. If the Vitals Only option is unchecked it will default to the normal size when opened and will retain its size if you manually resize it.



Identifying a Patient's Problem

You may review and print the diagnostic protocol for each problem including notes, recommendations and/or related documents. You may also review the different rule-outs (diagnoses) suggested for the problem.

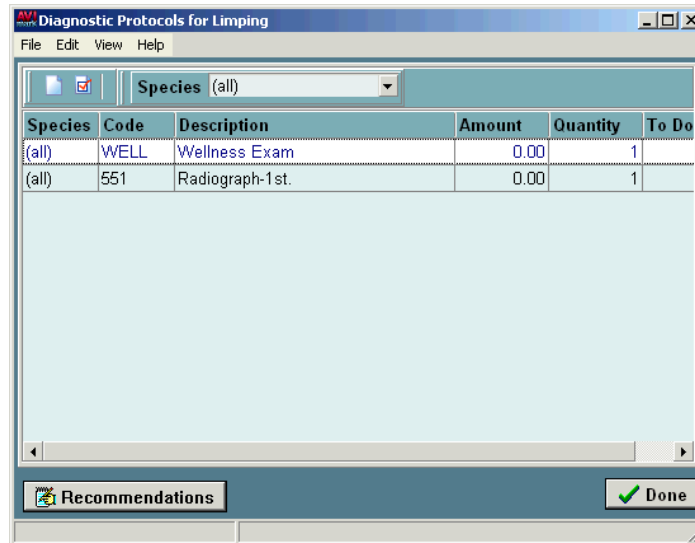
Choose a problem from the Problem List

- Within the Presenting Problem(s) field, **right-click** and from the shortcut menu click **Choose Problem** to display the Problem List window.
- From the Problem List window, select a **Category** and then select the **Problem(s)**.
- Click **Done**.
- You will need to click **Yes** to confirm adding the problem to the patient's Problem History.
- Type any notes/further description of the problem in the Chief complaint and client communication field.

Review Patient Problem History

In the Problem History area AVImark will display past problems, open and closed, for this patient. This area reflects the patient's Problem History that is accessed from the CID, Patient Area. It also has the same functionality. From here you can Open, Remove and Close Problems. A problem that has already been opened and possibly closed can be added to the Presenting Problems area. For more information on Patient Problem History refer to "View Patient Problem History" on page 135.

- Within the Problem History area, **right-click** and from the shortcut menu click **Add To Problems**.
- A message will be displayed asking if you wish to add the problem to the medical history. Select **Yes** to confirm this action.
- The problem will be added to the Medical History and be displayed in the Presenting Problems area for this specific Medical Condition Record.



Review Diagnostic Protocols

If the problem you have selected has an associated diagnostic protocol and/or rule-out(s) attached, you may review them while in the Medical Condition record.

- Select the problem from within the Medical Condition record. **Right-click** and from the shortcut menu click **Review Protocol** to display the Diagnostic Protocol window.
- To view any associated recommendation notes click the **Recommendations** button at the bottom of this window.
- To review any notes related to each treatment within the protocol window, select the appropriate treatment.
- **Right-click** and from the shortcut menu click **Notes**.

Additional protocols may also be added in this window while in the Medical Condition window.

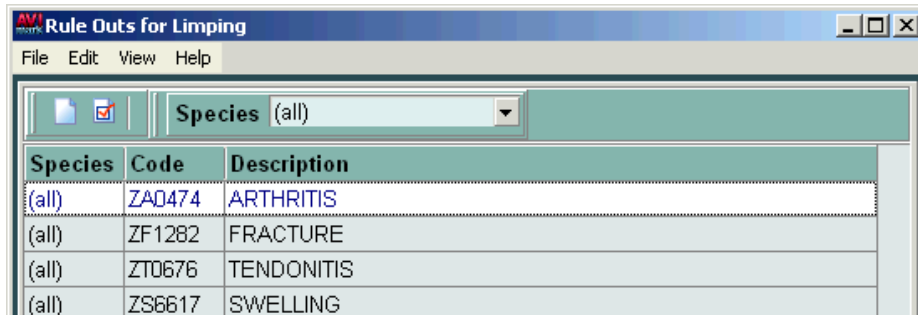
- In the Diagnostic Protocols window select **right-click New** from the shortcut menu.
- Enter the Code or tab to the Description field, enter the description and choose the appropriate service or item from the displayed list.
- Specify any other necessary information and click **OK**.
- Repeat this process if necessary. Click **Done** on the Diagnostic Protocols window once the desired protocols have been added.

OR

- In the Diagnostic Protocols window select **right-click Choose** from the shortcut menu.
- Choose the desired list and select the appropriate services or items and click **Done** on the list.
- Click **Done** on the Diagnostic Protocols window once the desired protocols have been added.

Review Rule-Outs

- With the correct problem selected **right-click** and from the shortcut menu click **Review rule-outs** to display the Rule-outs window.



- To review any notes related to each rule-out, select the appropriate rule-out.
- **Right-click** and from the shortcut menu click **Notes**.

Additional rule outs may also be added in this window while in the Medical Condition window.

- In the Rule Outs window select **right-click New** from the shortcut menu.
- Enter the Code or tab to the Description field, enter the description and choose the appropriate diagnosis from the displayed list.
- Specify any other necessary information and click **OK**.
- Repeat this process if necessary. Click **Done** on the Rule Outs window once the desired rule outs have been added.

OR

- In the Rule Outs window select **right-click Choose** from the shortcut menu.
- Choose the Diagnosis List, select the appropriate diagnosis and click **Done** on the list.
- Click **Done** on the Rule Outs window once the desired rule outs have been added.

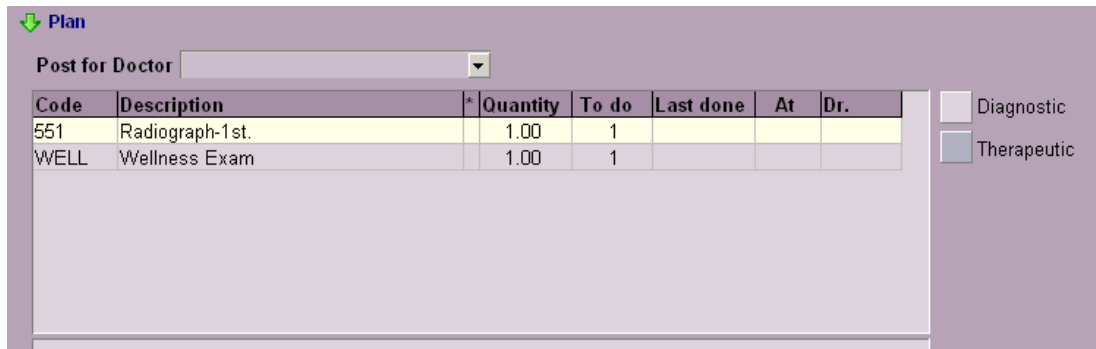
Review an MS Word Document

You may view and/or print any documents attached to the problem you have selected from the Problem List.

- With the correct problem selected on the Presenting Problems area, **right-click** and from the shortcut menu click **Review document** to display the attached MS Word document.

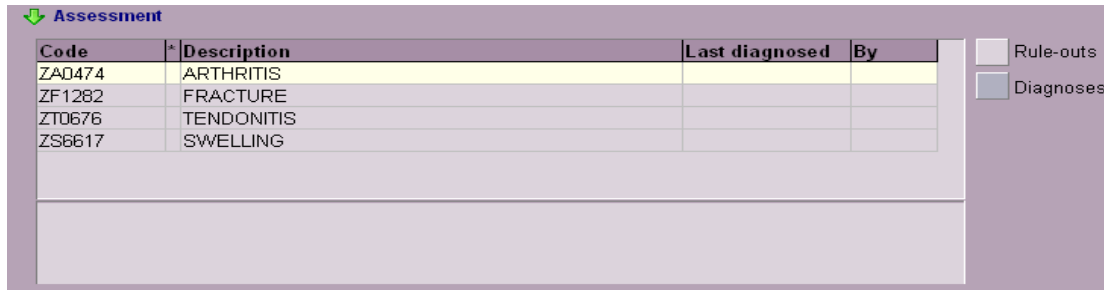
Accept the Diagnostic protocols into the Plan area

- With the correct problem selected on the Presenting Problems area, **right-click** and from the shortcut menu click **Accept Protocol** to accept and display the protocols on the Plan area.



Accept the rule-outs into the Assessment area

- With the correct problem selected on the Presenting Problems area, **right-click** and from the shortcut menu click **Accept Rule-outs** to accept and display the rule-outs in the Assessment area.



Work with the Objective Area

The Objective area is used to indicate specific problems the animal is having based on direct examination. In the Objective area you may enter miscellaneous notes relating to examination procedures and findings. This information will be saved and printed along with the other observations and memos on the Medical Condition chart and the Patient chart. You will see a list of Abnormality check boxes that correspond to the Abnormality table entries that you have defined in System Tables. When you check any one of these boxes, a window will open to enter associated notes, as well as the check boxes for any body subsystems that you have defined for this abnormality. Next to the abnormalities is a phrase field where a default phrase will appear or any text may be typed in this field.

Work with Client Instructions

This area allows instructions that are intended for the client to be kept separate from other notes that are recorded in the Medical Condition Record. This note area contains the same **right-click** options as other note window and can also be included on an MS Word document by using the appropriate merge words.

Work with the Assessment Area

The Assessment area is used to identify the diagnoses you would like to rule out as well as the final diagnoses of the problem the patient is having. The Assessment section consists of the Rule-outs that identifies the diagnoses that you will rule out and the Diagnoses that identify the final diagnosis.

Choose rule-outs from the Assessment area

- In the Assessment area, **right-click** and from the shortcut menu click **Choose Rule-out** to display the Diagnosis List window.
- Select the correct category and then the specific diagnosis.
- Click **Done**.

Attach notes to the rule-outs

- With the correct rule-out selected **right-click** and from the shortcut menu click **Rule-out Notes** to display the notes window.
- Type the notes and click **Done**.

Reject rule-outs

- With the correct rule-out selected **right-click** and from the shortcut menu click **Reject Rule-out**.
- To **reactivate** the rule-out, **right-click** and from the shortcut menu click **Reactivate Rule-out**.

Accept rule-out as final diagnosis

- With the correct rule-out selected **right-click** and from the shortcut menu click **Accept as Diagnosis**.
- You will need to click **Yes** to confirm and to display the accepted rule-out as a different color in the

Medical Condition Record

Assessment area. This will automatically post the accepted diagnosis to the patient's Medical History.

Remove a diagnosis from the Assessment area

- With the correct diagnosis selected **right-click** and from the shortcut menu click **Remove Diagnosis**.
- You will need to click **Yes** to confirm removing the diagnosis from the Assessment area.
- Click **Yes** to remove from the patient's Medical History.

Choose diagnosis from the Assessment area

- Within the Assessment area, **right-click** and from the shortcut menu click **Choose Diagnosis** to display the Diagnosis List window.
- Select the correct category and then the specific diagnosis.
- Click **Done**.

Attach notes to the diagnosis

- With the correct diagnosis selected **right-click** and from the shortcut menu click **Diagnosis notes** to display the notes window.
- Type the notes and click **Done**.

Enter the diagnosis into Medical History

- With the correct diagnosis selected **right-click** and from the shortcut menu click **Post**.

Review the recommended Treatment protocol for the diagnosis

- With the correct diagnosis selected **right-click** and from the shortcut menu click **Review Protocol** to display the Treatment Protocol window.

Accept the Treatment protocol

Accepting the Treatment protocol causes the protocol to be recorded and identified as a Therapeutic procedure in the Plan area.

- With the correct diagnosis selected **right-click** and from the shortcut menu click **Accept Protocol**.

Work with the Plan Area

The Plan area is used to gather and define the treatments that will be performed to diagnose the problem (Diagnostics) and what treatments will be performed to treat the patient (Therapeutic). When diagnostic protocols and treatment protocols are accepted they will automatically be added to the Plan area.

NOTE: By pressing CTRL+Tab you can change from selecting treatments to inventory items.

Enter treatments or inventory from the Plan area

Treatments and items can be manually added to the Plan area by using a few methods.

- From the Plan area **right-click** and from the shortcut menu select **Choose Entry** or press **F7**.
- Inside this window select the **Treatment** or **Inventory** tab and AVImark will display the appropriate entries.
- Under the Selected area on the left side of the screen choose whether the services will be added as **Diagnostic** or **Therapeutic** protocols.
- Highlight the desired treatment or item and press the **Spacebar** and AVImark will place the entry under the Selected window.
- Click **Done** and AVImark will add the services to the Plan tab.

OR

- From the Plan area **right-click** to display the shortcut menu. Point to **Choose Therapeutic entry**

or **Choose Diagnostic entry** and click either **Treatments** or **Inventory** to display the Treatment/Inventory List window.

- Select the correct treatment(s) and/or item(s) and click **Done**.

Post entries to Medical History


When treatments/items are posted to medical history from the Plan area, they will then appear in light gray indicating that it has already been posted. If the treatment had more than one (1) specified in the **To Do** column, this number will be reduced by one each time it is entered into Medical History.

- Select the appropriate treatment and/or item. **Right-click** and from the shortcut menu click **Post**.

Create an Estimate

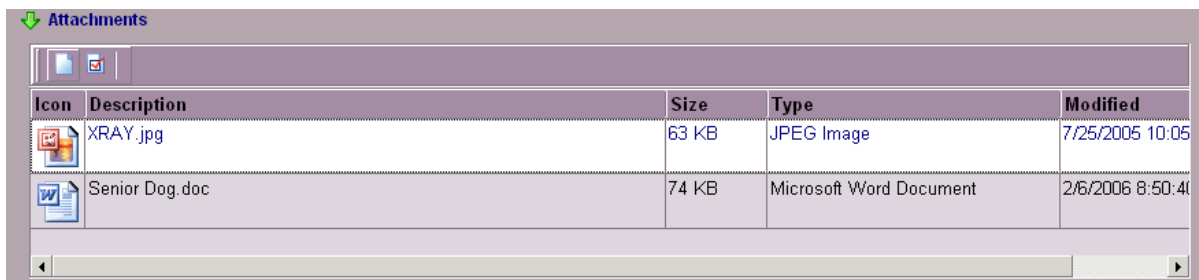
You have the ability to print an estimate for the treatments that are in the Plan area.

- From Plan area, **right-click** to display the shortcut menu. Point to **Create estimate** and click either **Diagnostic only**, **Therapeutic only**, or **Both plans**.
- You will need to click **Yes** to confirm and display the Estimate Detail window.
- To select treatments, items, diagnosis and/or add canned estimates from the Estimate Detail window, **right-click** and from the shortcut menu click **Treatment**, **Item**, **Diagnosis** and/or **Estimate**.
- Double-click in the Document field to display the Open window.
- Double-click the correct document and click **Print**.

	To learn more about:	Search the Help for:
	Medical Condition Records	Medical Condition Record
	Subjective Folder	Subjective area
	Objective Folder	Objective area
	Assessment Folder	Assessment area
	Plan Folder	Plan area
SOAP Attachments	Attachments area	

Work with Attachments

From the patient's medical history multiple files can be attached to one entry. If the selected entry has file attachments they will be displayed here. From this area multiple files such as documents, forms, photos, etc, can be attached.



- In the Attachments area, **right-click** and select **New** from the shortcut menu.
- Click the **Filename** search button to choose the desired photo, document, form, etc.
- Click **OK** to add the file. Any attachment that is added here can also be accessed from the patient's Medical History File Attachments.

Print Patient Report Card

To print a patient report card you must first create the form in MS Word. When creating this form use the

Medical Condition Record

appropriate medical condition record merge words.

A default document can be setup to work in two different ways:

1. Entering a document name in the Advanced Options, under “Default Report Card Document”, will set the specified document to be used for all report cards despite the species.
2. From System Tables a different document per species can be entered to be printed for the specific species.
 - From the Medical Condition Record click the **Report Card** option at the bottom of the window.
 - If a specific default document is specified in either the System Tables or Advanced Options the document name will automatically display or choose the desired form and click **Open**.
 - If appropriate, modifications can be made to the form.
 - The report card will then be saved to the Attachment directory and linked to the Medical Condition and Medical History File Attachment areas.

Create Additional Data Fields

AVImark allows you to create additional data fields for four of the main areas in the Medical Condition window. These additional data fields are created in the Additional Data Fields System Table in much the same way as you would create additional data fields for client or patient information.

- On the CID, open the **Work with** menu and click **System Tables** to display the System Tables window.
- Select the **Additional Data Fields** table and then the correct **Entries for** folder.
- **Right-click** and from the shortcut menu click **More Stuff Fields** to display the Define More Stuff window.
- Add the data fields you would like to create and click **Done**.

Open the Additional Data Field

- From the Medical Condition Record window, select the file menu **Med Condition**.
- Click **More stuff** and choose the area you where want to add More Stuff values.



To learn more about:
Additional Data Fields

Search the Help for:
SOAP Additional Fields

Print Medical Condition Record

The medical condition record can be printed or emailed.

- In the Medical Condition Record select **Print** from the **File** menu.
- From here click **Print** to print the entire medical record.
- To email the medical record click **Preview** from the Print Medical Condition window.
- In the Report Preview window select **File, Email** from the menu.
- Enter the appropriate information and click **Send**.

Graph Vital Signs Data

You may use Microsoft Excel to prepare, view, and/or print graphs of any of the vital signs data. This feature is dependent upon your having Microsoft Excel resident in your computer.

- Open the Medical Condition Record window for the selected Medical History entry.
- Select the data field you want to graph.
- On the **Med Condition** menu, click **Graph values** to display the Graphing window.
- Using the **Style** drop-down list, select either **Line**, **Bar** or **Area** and click **Print**.

CHAPTER 15: PRESCRIPTION LABELS

AVImark allows you to print prescription labels for any item or treatment in the Medical History area of the CID, OR by choosing an item in your Inventory and/or Treatment List. AVImark will print the doctor's name that prescribes the item, the client's name, the current date, the name and species of the patient, the prescription message, name of the item prescribed, expiration date as well as the quantity dispensed and the units of measure.

In this chapter you will learn about...

- » Printing a Prescription Label on page 215
- » Use the Drug Label Wizard on page 216
- » Type and Save a New message on page 216
- » Automatically Display Saved Messages on page 216
- » Choose a Linked/Saved Message on page 216
- » Choose from all Saved Messages on page 216
- » Delete a Saved Message on page 217
- » Refill Prescriptions on page 217
- » DVM Dispensary Services' MyVetsMeds® on page 218
- » VetCentric™ Home Delivery Interface on page 219

Printing a Prescription Label

You may print a prescription label for any item that has been dispensed to a patient or print a label by choosing an item/treatment from your Inventory/Treatment List.

- Select the correct item from Medical History or from your Inventory/Treatment List.

The screenshot shows a software window titled "AVI Drug label: Annual Physical Examination". The window has three tabs: "Labels", "Wizard", and "Formulary". The "Labels" tab is active. The window contains several input fields and buttons. At the top, there is a "How Many" field with the value "1" and a "Label Name" field. Below these is a large empty text area. Further down, there are fields for "Client" (containing "Brown, Bobby (524)"), "Container Expires" (a dropdown menu), "Patient" (containing "Achilles/Canine"), "Qty" (containing "1") and "ea" (units). At the bottom, there is a "Print to:" dropdown menu showing "DYMO LabelWriter 330 Turbo-USB". At the very bottom of the window are five buttons: "Next" (with a green checkmark), "Print" (with a green checkmark), "Done" (with a green checkmark), "Cancel" (with a red X), and "Help" (with a question mark).

- **Right-click** and from the shortcut menu click **Drug label** to display the Drug label window.
- Specify the correct message and click **Print**.

Note: The *Place Home Delivery Order* information will be utilized for a future AVImark integration.



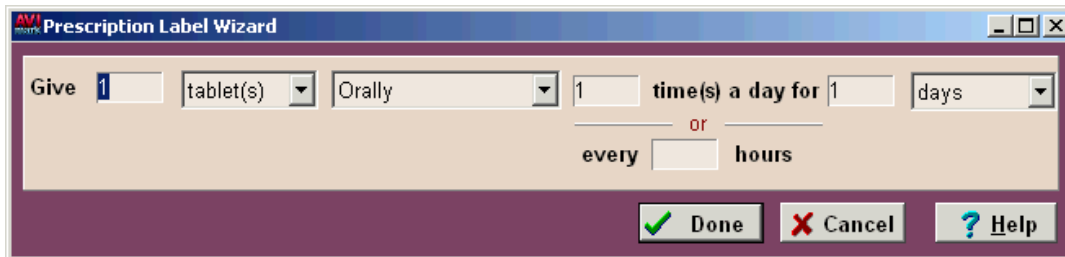
To learn more about:
Dymo® Label Printer

Search the Help for:
Specifying label printer

Use the Drug Label Wizard

AVImark will help you create the message that appears on the label.

- From the Drug label window, click the **Wizard** menu to display the Prescription Label Wizard.



- Use the entry fields and drop-down lists to specify the quantities and units of measure and click **Done**.
- From the Drug label window, click **Print**.

Type and Save a New message

AVImark allows you to type a new drug label message and save for further use.

- From the drug label window, type the message that you want to be printed. You may use any of the AVImark merge words in the message.
- Use the entry fields and drop-down lists to specify the quantities and units of measure.
- Click in the **Label Name** field and type a unique name up to 15 characters.
- **Right-click** and from the shortcut menu click **Save**.
- You will need to click **OK** to confirm that the message has been saved.

Automatically Display Saved Messages

Once you have saved one or more messages for an item, when you open the Drug Label Assistant window, the message displayed will be that message that is being used most frequently. You have the option of accepting this as the appropriate message, choosing a different message that has previously been saved for this item or typing a brand new message for the label.

Choose a Linked/Saved Message

Rather than typing a new message, you may instead choose one of those that have already been entered and saved for this item.

- From the Drug Label Assistant window, click **Next** to display the messages linked to this item.

OR

- From the Drug Label Assistant window, **right-click** and from the shortcut menu click **Choose** to display the Select Label Message window.
- From the **Labels for** section, select the appropriate label name and click **Done**.

Choose from all Saved Messages

When choosing an appropriate message for an item, AVImark also allows you to pick from the entire list of all saved messages. Once the right name has been chosen, you are then able to save and link it to the selected item or just print the label.

- From the Select Label Message window, select the **Show all** box to display a list of all saved messages.

- Choose the appropriate label name and click **Done**.
- If you wish to link this message with this item, **right-click** and from the shortcut menu click **Save**.

Delete a Saved Message

AVImark allows you to delete any saved message.

- From the Drug Label Assistant window, **right-click** and from the shortcut menu click **Choose** to display the Select Label Message window.
- Choose the label name you wish to delete. **Right-click** and from the shortcut menu click **Remove**. You will need to click **Yes** to confirm.

Refill Prescriptions

AVImark allows you to refill prescriptions from the Medical History of a patient. There are a few values that you will need to specify in order for AVImark to track the number of refills allowed for each item, what the date and interval limitations are for the refills, and whether refills are allowed dependant upon specific services which may have been performed on the patient.

Specify the refill control fields

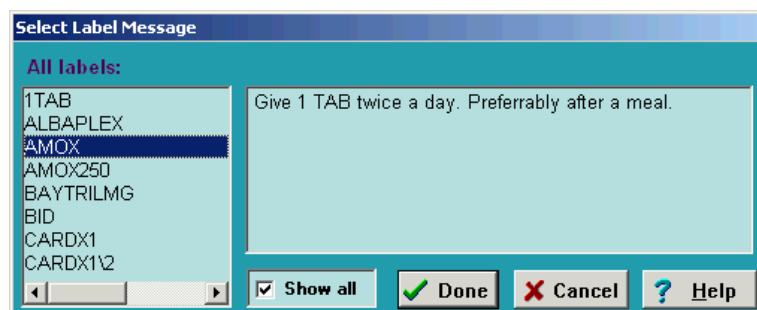
- From your Inventory List, select the item you wish to control the number of refills.
- Double left-click on the item to display the Change Item window.
- From the Action Code drop-down list, select the **Left Parenthesis** “(“ from the list.
- Within the **Refill for** field, specify the number of months that refills for this item are allowed.
- If appropriate, use the **if performed** field to specify the **Treatment Code** for a treatment, that if performed, would reset the refill number allowed to what was originally specified.
- Enter the number of days between allowable refills, in the **Minimum interval between refills** field and click **Done**.

Refill procedures

- With the correct item selected in the patient’s Medical History area, **right-click** and from the shortcut menu click **Refill** to display the Enter Medical History window.
- If appropriate, change the quantity and/or provider and click **Done** to display the Drug Label window.
- AVImark will indicate the current refill count in the Drug Label window. If you wish to start over on the refill count, select the **Start a new prescription** box.
- Click **Print** to reprint the original label text.

Printing Unique RX Refill Numbers

For clinics in Nevada they are required to print unique RX numbers for refills.



- From the CID select the **Hammer, Screwdriver and Wrench** speed bar icon.
- In the **search** field type **sequence** and select the option **Nevada Refill Sequencing** and set the value to **True**.
- You will also select the option **Sequence Number** and set the value to **True**.

As refills are entered into Medical History, AVImark will look back to the original sequence number assigned when the item was administered and assign the letter R to the end of the number.


Printing Lot Number on Drug Label

The state of Florida now requires a Lot Number to be stored and printed on each Drug Label.

- From the CID select the **Hammer, Screwdriver and Wrench** speed bar icon.
- In the **search** field type **lot** and select the option **Inventory Lot Number** and set the value to **True**.
- You will also select the option **Prompt to Update Lot Number When Lot Empty** and set the value to **True**.

A Lot Number field will now be available from the Pharmacy tab of the Change Item window allowing you to enter the Lot Number and the amount in the Lot. As the item is dispensed AVImark will subtract the amount from the Lot amount field. When the Lot amount reaches 0, AVImark will display a message prompt allowing you to click Yes and have AVImark refill the Lot amount field using the item Order Pack, minus the amount just dispensed.

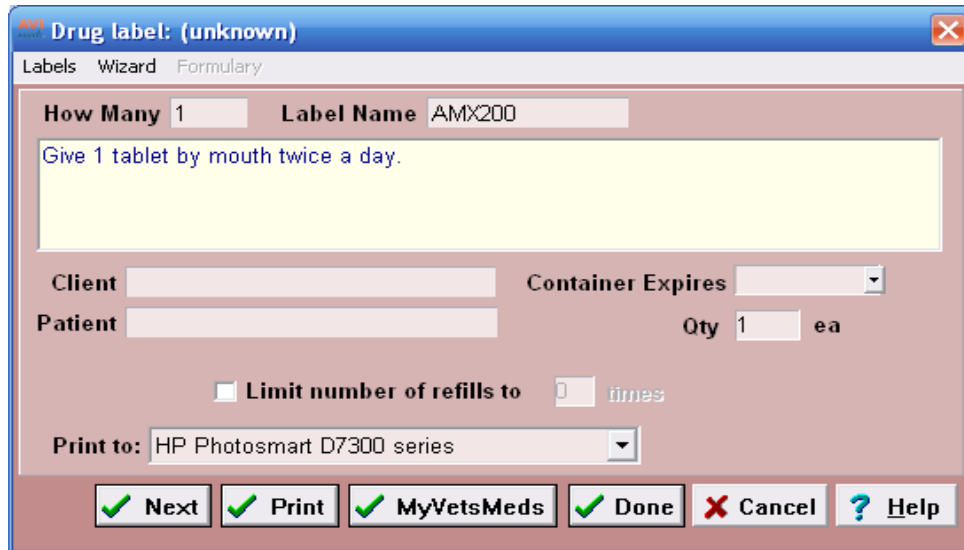
The screenshot shows the 'Pharmacy' tab in the AVImark software interface. The 'Refill' section is active, displaying the following settings: 'Months' set to 2, 'or if (NONE)' selected, and 'performed.' checked. Below this, 'Minimum interval between refills' is set to 14 days. At the bottom, there are two rows for 'Lot #' and 'Container', each with a text input field and a 'with' dropdown menu set to 0.00.

	To learn more about:	Search the Help for:
	Drug labels	Prescription labels
	Refill procedures	Refill prescriptions

DVM Dispensary Services' MyVetsMeds®

Integration is available with the MyVetsMeds® online ordering and home delivery services veterinary practices are providing to their clients. This integration allows veterinarians who use MyVetsMeds® to send the veterinarian's dispensing authorization and instructions to MyVetsMeds® directly from within AVImark.

To use the MyVetsMeds® integration feature, contact them to obtain your Clinic ID and Password. Then specify your Clinic ID and Password within the Advanced Options. A new MyVetsMeds® button will then be displayed on the AVImark drug label window. Selecting this button will automatically forward the client, patient and dispensing information to MyVetsMeds® where it will then be processed for home delivery directly to your clients pet in your name.



VetCentric™ Home Delivery Interface

AVImark has teamed up with VetCentric™, Inc. to provide our mutual Veterinary Practices the ability to offer home delivery of FDA- and EPA-approved pharmaceuticals, compounded medications, and therapeutic and wellness diets, for their clients. This integration will allow our users the option of filling prescriptions “in-house”, sending the prescription to VetCentric for convenient home delivery or a combination of the two.

To use this feature, you must have AVImark version 2010.4.1 or higher and have an active VetCentric™ account. If you are not currently a VetCentric™ customer and would like to take advantage of this feature, call a VetCentric™ specialist toll-free at 1-866-868-2368. Select option 2, and then option 4, Monday through Friday between 8:30 a.m. and 5:30 p.m. EST.

If you have an account with VetCentric™ and would like more information on activating your VetCentric™ Home Delivery account for use with AVImark, you can choose from the following:

- E-mail your request to avimark@vetcentric.com
- Contact VetCentric™’s Practice Management Software specialist, Rob Fitch at 410-412-1457

AVImark Setup

Your clinic’s VetCentric™ account information will need to be entered into AVImark **Advanced Options**. This can be accomplished by the following the below steps:

- Type “VetCentric” in the search field of Advanced Options.
- Expand the VetCentric tree.
- Set the default value for each of the following fields using information provided by VetCentric.
 - Password
 - Secret Key
 - Username
 - Vet ID
- You may wish to assign your Default Pharmacy Company. Setting this option to VetCentric™, will allow VetCentric™ to automatically be selected when creating your home delivery order from within the

AVImark Drug Label window.

To achieve this:

- While still in Advanced Options, type “pharmacy” in the search field.
 - Select VetCentric™ as your Default Pharmacy Company
- An option has been added to set the default Fill Preference for prescriptions. You can set this value by searching for **Default Order Type**.
 - **InClinic** – will keep the Home Delivery option from being automatically checked in the drug label window.
 - **FirstInRemainingOut** – will automatically default to the **First Fill in, Refills out** selection in the drug label window.
 - **AllFillsOut** – will automatically default to the **All Fills Out** selection in the drug label window.

Doctor Information (Users and Security)

Each doctor generating VetCentric™ prescriptions will need to have additional user information to accommodate prescription reporting requirements. The following new fields have been added in the AVImark Change User window found in Users and Security:

- **License State Field** - This field is to be filled with the state in which the doctor is licensed and will coincide with the doctor’s License Field.
- **License Exp** - The expiration date of the doctor’s license.
- **DEA Exp** - The expiration date of the DEA number assigned to this doctor.
- **First and Last Name Fields** - The name of the doctor will need to be modified from the single “Name” field, to now reflect the first name and last name in the corresponding fields.

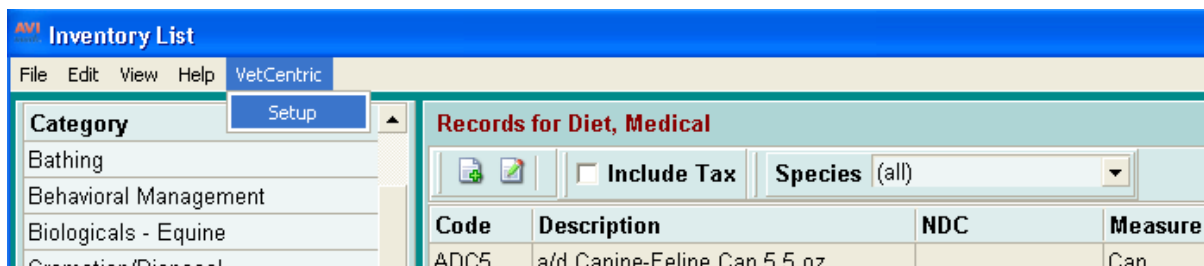
****Special NOTE:** The First and Last Name fields will only need to be manually modified during early Beta Testing stages. When released officially, the AVImark update process will make the first and last name modifications automatically.

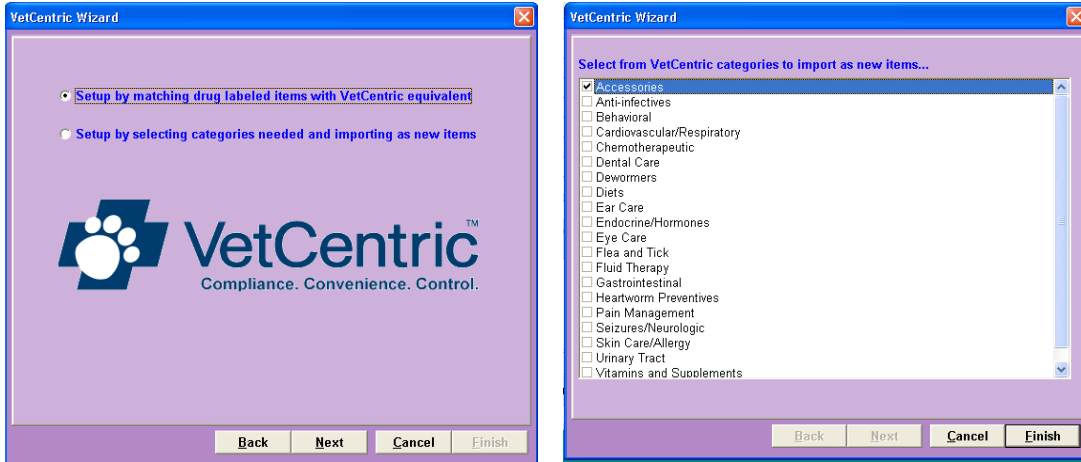
AVImark/VetCentric Code Association

There will need to be VetCentric™ item associations to AVImark items in order to have the proper VetCentric™ items selected for home delivery when an AVImark prescription item is entered. There are several ways to accomplish this.

Option 1

- By opening the Inventory List select VetCentric, Setup from the menu. You will be presented with the VetCentric™ Wizard.





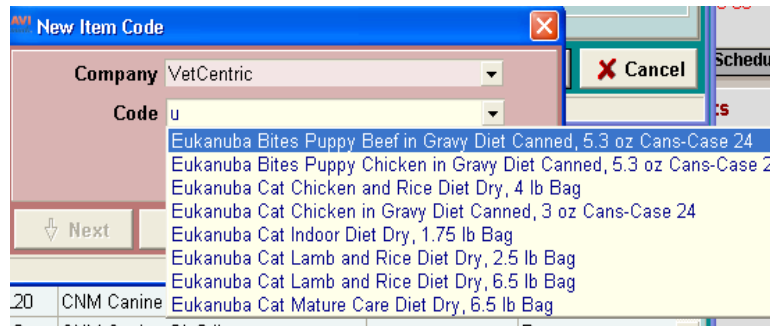
- Setup by matching drug labeled items with VetCentric™ equivalent. This will load your AVImark Item Codes and Descriptions with associated drug labels and allow you to select the VetCentric™ item from a drop-down list that most appropriately matches your AVImark item.
- Setup by selecting categories needed and importing as new items. This will load all the VetCentric™ categories and allow you to select which categories you wish to have automatically added to your AVImark Inventory List.

****Important NOTE:** When you add new AVImark items by VetCentric™ category, item descriptions will be abbreviated in a manner to allow fully identifiable information while taking into consideration the AVImark item description character limitation. Each VetCentric™ item added by category will display a description beginning with an asterisk (*). This distinction will allow a user to search a list including or excluding VetCentric™ items when adding prescriptions to Medical History.

Option 2

You can directly map a VetCentric™ item to your AVImark items from within your AVImark Inventory List.

- Open the Change Item window for the selected AVImark item.
- Select the **Pharmacy** tab.
- In the area labeled Pharmacy Company Codes choose **right-click, New**.
- Select **VetCentric** from the Company pull down menu.
- Select the VetCentric™ item that represents the AVImark item equivalent.



Option 3

The mapping of a VetCentric™ item to an AVImark item can also be completed “on the fly” directly from within the AVImark Drug Label window at the time of item being entered into Medical History.

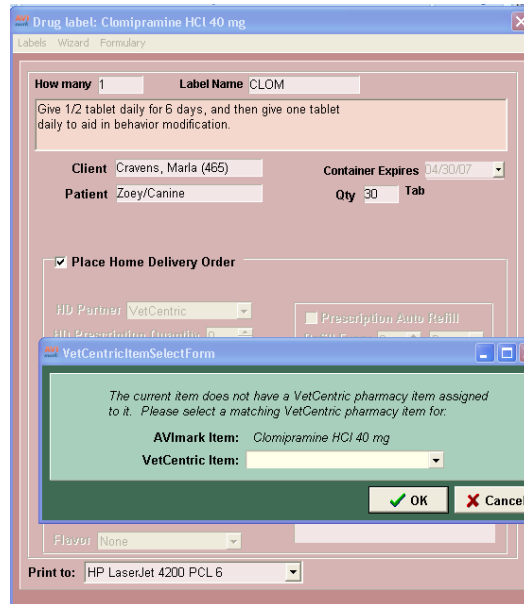
Feature Use

Opening the Drug Label for a VetCentric™ associated AVImark item in Medical History will display a Drug Label with many new options. The Drug Label window will allow you to both print a drug label to affix to your direct dispensed prescription and/or enter Home Delivery Order information to have the prescription sent to VetCentric™ online pharmacy to have it filled and delivered by them. One of the great features of this enhancement is the ability to perform a “first fill” from in-house and send the balance of the prescription and/or refills to be performed via VetCentric™.

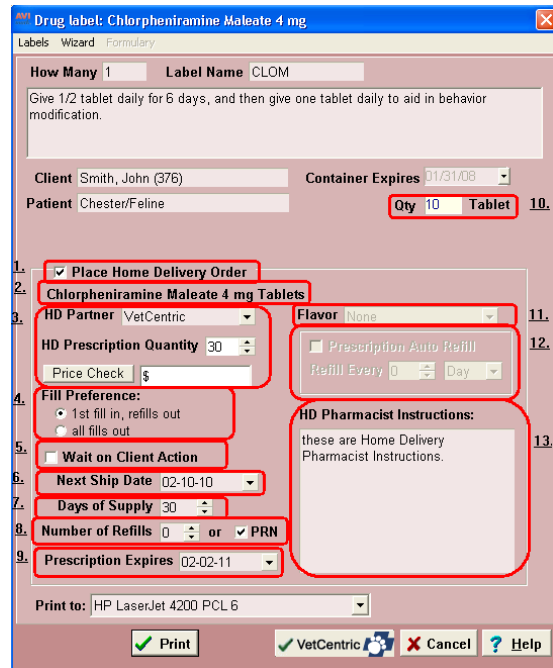
Below is a list of the VetCentric™ options that will be available in the Drug Label window of a VetCentric™ associated item.

- **Place Home Delivery Order** – Option indicating intention to place Home Delivery Order.
 - **VetCentric Item Description**
 - **Home Delivery Pharmacy** selection. (Will default to Home Delivery Selection made in Advanced Options). **HD Prescription Quantity** – indicates qty of the item per fill. **Price Check** – will give you the VetCentric price for qty chosen.
 - **Fill Preference** is how you wish to have prescription filled. **1st fill in** – indicates intention to fill first from in-house and all subsequent fills from VetCentric. **All fills out** – indicates you wish to have all fills of this prescription filled by VetCentric. A default value can be set for the Fill Preference in Advanced Options.
 - **Wait on Client Action** – will upload the prescription information to the VetCentric Medicine Cabinet allowing the client to log into the site, or call VetCentric, at their discretion to purchase the item as needed.
 - **Next Ship Date** – is when you wish the first shipment to take place from VetCentric.
 - **Days Supply** – indicates the number of days you wish to have supplied per delivery.
 - **Number of Refills** – will allow you to indicate how many refills of this script can be obtained. **PRN** – indicates the prescription can be filled as needed until the prescription expiration date has been reached.
 - **Prescription Expires** – indicates the date at which the prescription is no longer valid.
 - **Qty** – indicates the number of the prescription item you are dispensing from the clinic and will be deducted from your clinic on-hand qty, as well as print on the drug label.
 - **Flavor** – will be activated when a VetCentric item calling for a flavored suspension has been prescribed, allowing a user to select the desired suspension flavor.
 - **Prescription Auto Refill** – indicates this prescription can be refilled automatically without refill authorization for the interval selected and can only be used with a **Number of Refills** greater than 0 or **PRN** option being selected. VetCentric offers free standard shipping with no minimum order amount on all products when Auto-Refill is activated.
 - **HD Pharmacist Instructions** – Field for specific instructions from the user who prescribed the medication to the pharmacist.
- When the option to “1st fill in, refills out” is selected, a Print button will be available to print your Drug Label. If you have chosen the “All fills out” option, the Print button will not be available. If you have selected “1st fill in” you can Print the drug Label, then Press the VetCentric button to send your online pharmacy order.
 - When a prescription is chosen to be filled by VetCentric™, and not directly dispensed from the clinic, the Medical History entry will become black in color with a qty and amount of 0.00, indicating that nothing was dispensed and of a “posted” status.
 - An AVImark invoice that contains a VetCentric™ prescription will display that line entry indicating it

has been assigned to VetCentric. There will also be an informational message on the invoice with the VetCentric™ web-address and customer username, allowing the AVImark/VetCentric™ customer to log into the VetCentric™ website to make arrangements for prescription delivery and payment arrangements.



- AVImark will contact the VetCentric™ server daily for prescription updates on all open prescriptions. When a VetCentric™ assigned refill is dispensed a new AVImark Medical History entry is created indicating a refill took place.
- From the **right-click, Integrations, VetCentric** menu option in Medical History there are additional options.
- **Buy a Prescription Now** – will take you to the VetCentric secure site to allow the customer to place and pay for their Home Delivery Order before leaving your clinic.
- **Resend All Failed Pharmacy Orders** – will allow you to send Home Delivery orders that were not able to be uploaded at the time the Medical History order was generated.
- **Update VetCentric Prescriptions** – will poll the VetCentric site for any information on Home Delivery pharmacy orders filled, or any other status changes, and create AVImark Medical History entries accordingly.
- **Cancel Prescription** – will present you with a “Cancel Reason” window to enter the reason for cancellation. Once cancelled, the Medical History entry will display “Cancelled”.



When a VetCentric item is ordered through AVImark, specific information for that order will be included on the AVImark Invoice. This will allow the customer to take important material with them outlining details about the item ordered, as well as customer login information that will allow the customer to log into the VetCentric site and set up payment and delivery arrangements.

- The AVImark line item on the invoice will be displayed as:

Date	For	Qty	Description	Price
11-02-09	Chary	1	Advantix Blue over 55 lbs Canine, 12 pk(VetCentric Order)	0.00

- With a notation on the bottom of the Invoice stating:

Medical History											
Date	Time	Dr.	Type	Code	Description	Qty	Amount	By	Photo	Public?	
06-09-10	12:00a		O	V2906	VetCentric Prescription Refill VetCentric RX# 111148; Expires: (none); Status: Completed Refills Pending Price: \$63.47	1	0.00			Yes	

NOTE: The AVImark client should have a valid email on file in the email field of the Client Information area for this feature. This email address will be assigned as the User ID for their VetCentric site access. If no email address was found in the AVImark Client area, the phone number will be used, and noted on the AVImark Invoice.

CHAPTER 16: ESTIMATES

In this chapter you will learn about...

- » Set Up Your Estimates on page 225
- » Create Estimates for Patients on page 228
- » Save a Patient Estimate as a Canned Estimate on page 232
- » Select a Canned Estimate for a Patient on page 232
- » Print the Estimate on page 232
- » Post an Estimate on page 234
- » Customize Columns on page 234
- » Sort the Estimate Entries on page 234
- » Change Multiple Entries on page 234
- » Preview Text in the Estimate List on page 235

Set Up Your Estimates

You may set up your estimate list by specifying estimate names along with the treatments, inventory items and/or diagnoses which make up each estimate. AVImark is delivered to you with a sample set of estimates which you may edit.

AVImark Estimate Maintenance

File Edit View Help

Name

- Aural Hematoma
- Canine Dental Prophy Grade 1
- Canine Dental Prophy Grade 2
- Canine Dental Prophy Grade 3
- Canine Dental Prophy Grade 4
- Canine Neuter
- Canine OVH
- Cruciate Ligament Repair
- Cystotomy
- Endoscopy
- Feline Declaw
- Feline Dental Prophy Grade 1
- Feline Dental Prophy Grade 2
- Feline Dental Prophy Grade 3
- Feline Dental Prophy Grade 4
- Feline Neuter
- Feline Neuter/Declaw
- Feline OVH

Find

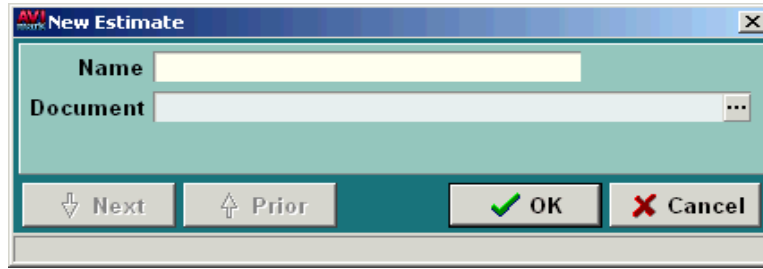
Detail for Aural Hematoma


Include Tax

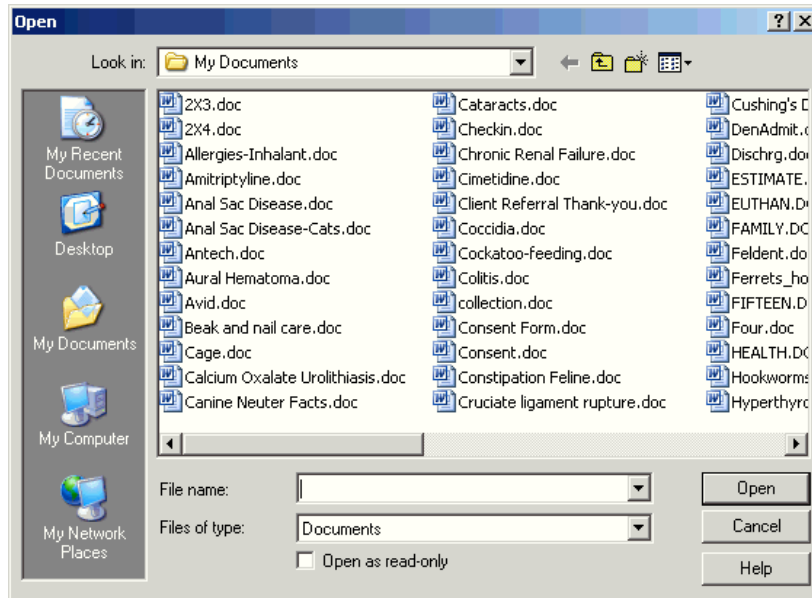
Code	Description	Varianc	Qty	Repeat	Charge
142	Catheterization, Intravenous	0%	1	1	32.50
3006	Butorphanol 10 mg/mL	0%	1	1	14.02
3006	Butorphanol 10 mg/mL	0%	1	1	14.02
3715	Glycopyrrolate 0.2 mg/mL	0%	1	1	1.51
3041	Propofol 10 mg/mL	0%	20	1	25.60
1072	Rubber Cath./Feed tube 8fx16	0%	1	1	4.23
633	Hematoma Repair, Aural	0%	1	1	45.00
3210	Cephalexin 500 mg	0%	14	1	27.21
678	Operating Room Setup, Outpatient	0%	1	1	12.50
709	Cardiopulmonary Monitor	0%	1	1	24.50
106	Anesthesia, Iso Maintenance (15 min)	0%	1	1	46.00

Estimate Total for "Buster" Hampton: 259.14 Estimate 259.14

- On the CID, open the **Work With** menu. Click **Estimates** to display the Estimate List Maintenance window.
- In the **Name** section, right-click and from the shortcut menu click **New** to display the New Estimate window.



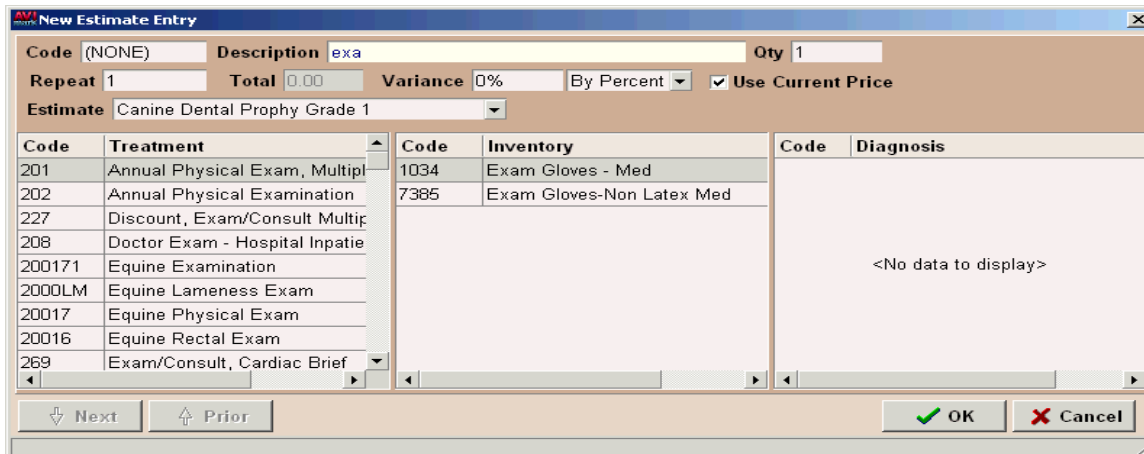
- Use the **Name** field to type the name for this estimate.
- In the **Document** field, use the Browse  button and select the MS Word document from the Open window.



- Click **OK** to save the estimate.

Define the estimate details

- In the **Estimate Detail** area, right-click and from the shortcut menu click **New** to display the New Estimate Entry window.



Code

This will be the code of the treatment, item or diagnosis you wish to add to the estimate.

- Type the **Code** for the treatment, item or diagnosis you wish to add to the estimate.

Description

This will be the description of the treatment, item or diagnosis you wish to add to the estimate.

- Type part of the description to display a list of all treatments, items and/or diagnosis containing that portion of the description.
- Double-click on the correct code.

QTY

This field allows you to specify the appropriate quantity.

- Enter the appropriate quantity.

Repeat

You may add the number of times a patient should receive repeated treatments of an Estimate line-item. The line item will not be grayed out as being completed until all repeated treatments have been added. All Repeat treatments will need to remain unposted in order for the repeat count to be accurate.

- If appropriate, enter a quantity to repeat.

Total

AVImark lets you specify the price for a treatment or item on the estimate. To enter a price different than the normal item price, you must uncheck the **Use Current Price** box.

- Type the exact amount you wish to charge for the quantity of items specified, or select the **Use Current Price** box to charge the normal price of the item.

Variance

AVImark allows you to set a variance range by percentage, by dollar amount or by quantity.

- If appropriate, specify a variance. Use the drop down list to select **By Percent**, **By Amount** or **By Quantity**. If using By Percentage, enter the percent as a whole number.
- Click **OK** to add this item to the estimate detail for this estimate.

Use Estimate Maintenance List Shortcut Menu

Within the Estimate Maintenance List window there are other features found in the shortcut menu. Use the right-option to see the shortcut menu.

Add a duplicate estimate entry

AVImark allows you to add another entry, of the one selected, to the estimate.

- From your Estimate Maintenance window, under the Detail for area select the entry you wish to duplicate.
- Right-click and from the shortcut menu click **Another** to display a duplicate New Estimate Entry window.
- Make any changes necessary such as quantity, repeat, variance, etc and click **Done**.

Edit Changes

Use the Edit menu to select estimate entries or to undo or redo changes to an entry.

View

From the View shortcut menu you can Refresh the window, customize columns, view the Entry History for this estimate entry, Preview or Hide text associated with the estimate entry or you can choose how to sort the window. If you have customized the display by arranging and adding or removing columns you can print the display by using the Print option from the View menu

Entry History

Use this option to view a history of changes made to the selected estimate entry.

- Select an entry and choose right-click **View, Entry History**.
- View date and time the change was made, the logged in user who made the change and a description of the change that was made.
- Click **Done** to close the window.

Move an entry from one estimate to another

If appropriate you may move the estimate entry to a different estimate.

- Select an entry and choose right-click, **Move**.
- You will need to click **Yes** to confirm the move.
- Click the appropriate estimate name to move the entry to.

Choose

Use this option to add treatments, items, diagnosis or problems to the selected estimate.

- Select the appropriate estimate name and from the Detail for area select right-click **Choose**.
- Choose the desired list, select the desired entries and click **Done** to add them to the estimate.
- Repeat this process until the desired entries are associated with the estimate.

Enter estimate notes

You may enter notes regarding a specific estimate entry using all of the available AVImark note feature options.

- With the correct entry selected, right-click and from the shortcut menu click **Notes** to display the Notes window.
- Type the appropriate notes for this entry. All of the AVImark notes feature options are available in this window.
- Click **Done** to save the notes.

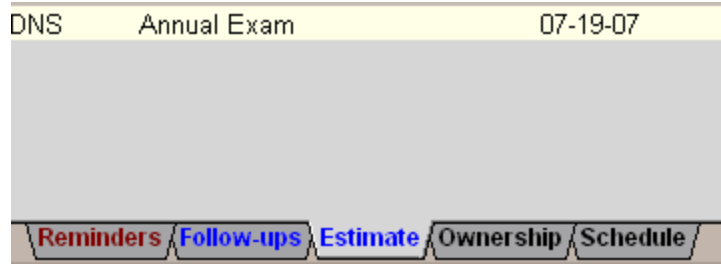
Create Estimates for Patients

When creating an estimate for a patient, you may choose one of the canned estimates either as is or you may modify it. You may also create and save a new one from the CID for the selected patient.

- With the correct patient displayed, select the **Estimates** folder tab.

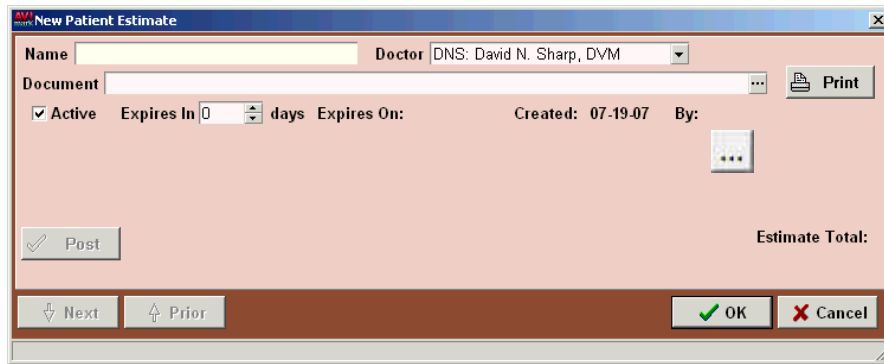


AVImark allows you to customize the name of the Estimate tab as well as additional areas that reference the Estimates such as the Work With menu and the Canned and Patient Specific Estimate windows. This can be done from the Option Maintenance area of Hospital Setup.



Create a new estimate

- In the Estimate Folder, right-click and from the shortcut menu click **New** to display the New Estimate window.



- Use the **Name** field and type the name you wish to give the estimate.
- Using the **Doctor** drop down list, select the appropriate doctor.
- To select an estimate document for this patient, click the browse button in the Document field and select the correct document.
- If appropriate, use the **Expires In** field and enter the number of days when this Estimate will expire. The actual expiration date will be displayed after the **Expires On:** field.
- When the estimate is created the created date will be displayed.
- When a Patient Estimate is created or chosen, the name of the user who is currently logged in will be displayed next to the **By** field.
- Click **OK**. The same window will be displayed, but an area for adding the Estimate line-items will now be available.

- Select the treatments, items and/or diagnosis in the same manner as previously discussed in the topic, “Define the estimate details” on pa226215.
- To make a change to an entry, double-click the entry to display the Change Patient Estimate Entry window.

- Click **OK** to save the new patient estimate.

Use Patient Specific Estimate Shortcut Menu

Within the Estimate Maintenance List window there are other features found in the shortcut menu. Click the right mouse button (called right-click) to see the shortcut menu.

Edit Changes

Use the Edit menu to select estimate entries or to undo or redo changes to an entry.

View

From the View shortcut menu you can Refresh the window, customize columns, view the Entry History for this estimate entry, Preview or Hide text associated with the estimate entry or you can choose how to sort the window. If you have customized the display by arranging and adding or removing columns you can print the display by using the Print option from the View menu

Entry History

Use this option to view a history of changes made to the selected estimate entry.

- Select an entry and choose right-click **View, Entry History**.
- View date and time the change was made, the logged in user who made the change and a description of the change that was made.
- Click **Done** to close the window.

Choose

Use this option to add treatments, items, diagnosis or problems to the selected estimate.

- Select right-click **Choose** in the Patient Estimate window.
- Choose the desired list, select the desired entries and click **Done** to add them to the estimate.
- Repeat this process until the desired entries are associated with the estimate.

Enter estimate notes

You may enter notes regarding a specific estimate entry using all of the available AVImark note feature options.

- In the Patient Estimate window, right-click and from the shortcut menu click **Notes** to display the Notes window.
- Type the appropriate notes for this entry. All of the AVImark notes feature options are available in this window.
- Click **Done** to save the notes.

Print

Use this menu option to print the Estimate document.

- Within the Patient Estimate window, right-click and from the shortcut menu click **Print**.

Decline

If an individual estimate entry has been declined by a client but you would like to keep record that the service was recommended, use the decline option to mark the entry as such.

- Select the appropriate entry, right-click and from the shortcut menu choose **Decline**.
- The entry will be added to medical history as declined and it will also be recorded in the estimate as declined.

Post

Use this menu option to post individual estimate entries to the patient's medical history.

- With the appropriate entry selected, right-click and from the shortcut menu click **Post**.
- The entry will be posted to the patient’s medical history and will appear gray in the Patient Estimate window.

Select

Use this menu option for selecting multiple entries that need to be posted.

- Click on the desired entry and from the right-click shortcut menu choose **Select**.
- A separate window will appear displaying those entries you have selected. As you continue to select entries they will appear in this window.
- If so desired, click **Post** to post only the selected entries to the patients medical history.

Save a Patient Estimate as a Canned Estimate


AVImark lets you save an estimate that you have set up for an individual patient into the canned estimate list for future use.

- Select the correct estimate from the Estimates folder tab. Right-click and from the shortcut menu click **Save**.
- You will need to click **Yes** to proceed with saving the estimate.

Select a Canned Estimate for a Patient

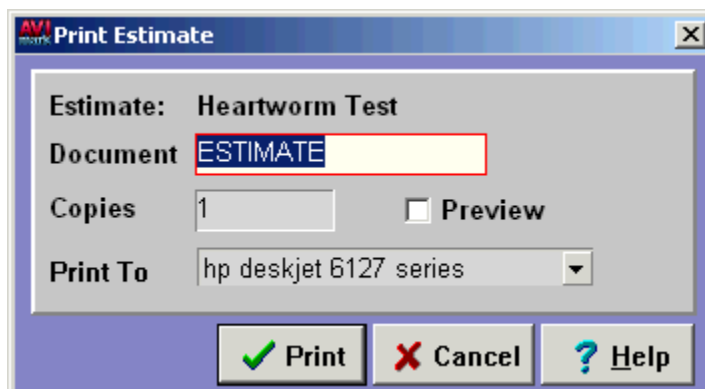
You may choose a canned estimate for the patient from the Estimates Folder tab.

- From the Estimates Folder tab, right-click and from the shortcut menu click **Choose** to display the Estimate List Maintenance window.
- Select the appropriate estimate for the patient and click **Done** to place the estimate into the patient’s Estimate Folder.

	To learn more about:	Search the Help for:
	Canned Estimates	Canned estimates
	Patient Specific Estimates	Create patient estimates

Print the Estimate

- From the patient’s Estimates Folder tab, select the correct estimate. Right-click and from the shortcut menu click **Print** to display the Print Estimate window.



- Using the **Copies** field, enter the number of copies to print.
- Use the **Print to** drop down list to select the correct printer.
- Click **Print** to print the estimate or select **Preview** and click **Print** to view the Estimate document on

screen.

Print an estimate document other than the default Estimate document

AVImark allows you to print an estimate document of your choice.

- In the **Document** field, right-click and from the shortcut menu click **Choose** to display the Open window.
- Select the correct document and click **Open**.

Edit the estimate document

- In the **Document** field, right-click and from the shortcut menu click **Change** to display the document for editing.
- After the necessary changes have been made, click the **X** in the upper right hand corner of the document to save and close the document.

Enter notes on the estimate

You may enter notes for line items on an Estimate either from the Estimate List Maintenance window or from the Estimates Details window in the patient's Estimates Folder.

- Select the correct estimate entry. Right-click and from the shortcut menu click **Notes** to display the Estimate Notes window.
- To have the notes print on the estimate document, select the **Public box**.
- Type the appropriate notes and click **Done**.



*On the Estimate document AVImark will also print comments linked to a treatment. This can be done from the Option Maintenance area of Hospital Setup and setting the option **Include Treatment Comments to True**.*

Decline an Estimate

You may decline individual services or items in an estimate or you may decline an entire estimate.

Decline an individual service or item

- From the patient's Estimates Folder, double-click the correct estimate to display the Estimate Detail Window.
- With the correct service and/or item selected right-click and from the shortcut menu click **Decline**. This will automatically place the entry into Medical History as DECLINED.

Decline multiple services and/or items

- From the patient's Estimates Folder, double left click the correct estimate to display the Estimate Details window.
- Select one of the entries to be declined. Use the SPACEBAR to bold the entry. You will do this for each entry that is to be declined.
- Right-click and from the shortcut menu click **Decline** to automatically post the entries to Medical History as DECLINED.

Decline the entire estimate

- From the patient's Estimates Folder, select the correct estimate to be declined.

- Right-click and from the shortcut menu click **Decline**.
- You will need to click **Yes** to confirm and to post the estimate to Medical History as DECLINED.

Post an Estimate

AVImark allows you to post an estimate for a patient into Medical History.

Post an individual service or item

- From the patient's Estimates Folder, double-click the correct estimate to display the Estimate Details window.
- Select one of the entries to be posted. Use the SPACEBAR to bold the entry. You will do this for each entry that is to be posted.
- After all entries you wish to post have been bolded, click **Post**.

Post the entire estimate

- From the patient's Estimates Folder, select the correct estimate to be posted.
- Right-click and from the shortcut menu click **Post**.
- You will need to click **Yes** to confirm and continue with posting the estimate.

Show Ghost

AVImark allows you to display estimates that have been previously posted to a patient's medical history.

- From the patient's Estimates Folder, right-click and from the shortcut menu click **Show ghost**.

Customize Columns

AVImark allows you to arrange, resize, and/or add and remove the columns in the Estimate List Maintenance window. For a detailed discussion on customizing columns, refer to "*CHAPTER 32: CUSTOMIZING COLUMNS*".

Sort the Estimate Entries

You may sort the entries in the Estimate Detail section of the Estimate List Maintenance window.

- Left click on the Column Heading you wish to Sort. Each click on the Column Heading will sort the list in either ascending or descending order.

Change Multiple Entries

AVImark allows you to change multiple entries within the estimate.

Select multiple random entries

- In the Estimate detail section, select one of the entries.
- Hold down the CTRL key and click on additional, random entries.
- With the required entries highlighted right-click and from the shortcut menu click **Change** to display the Change Estimate Entry window.
- Make the necessary changes and click **OK**.

Select multiple consecutive entries


- In the Estimate detail section, select one of the entries.
- Hold the SHIFT key and use the UP and DOWN ARROW keys to select multiple consecutive entries.
- With the required entries highlighted right-click and from the shortcut menu click **Change** to display the Change Estimate Entry window.

- Make the necessary changes and click **OK**.

Preview Text in the Estimate List

You may display notes that are attached to treatments and items in the Estimate List maintenance window.

- In The Estimate List Maintenance window, open the **View** menu. Click **Show/Hide Preview**.

	To learn more about:	Search the Help for:
	Save estimates	Estimates tab
	E-mail estimates	Emailing reports
	Add Entries to the Estimate	Defining estimate detail

CHAPTER 17: APPOINTMENT CALENDAR

The AVImark Appointment Calendar is designed to show, in a “day-at-a-glance” format, your appointments for whichever doctor and treatment room you select. The appointments are shown on an Appointment “notebook” with the times listed down the left side.

In this chapter you will learn about...

- | | |
|--|---|
| » Displaying the Appointment Calendar on page 237 | » Checking In an Appointment on page 249 |
| » Setting up the Appointment Calendar on page 241 | » Confirming an Appointment on page 249 |
| » Making Appointments on page 241 | » Deleting an Appointment on page 249 |
| » Link Appointments on page 242 | » Return to the CID on page 250 |
| » Grouping Appointments on page 243 | » Scheduling Next Appointment on page 250 |
| » Use the Appointment Openings Feature on page 243 | » Moving Appointments on page 250 |
| » Working with the Appointment Window on page 244 | » Rescheduling Appointments on page 251 |
| » Appointments for New Clients on page 246 | » Printing the Appointment Schedule on page 251 |
| » Appointments for New Patients on page 247 | » Out of Office Schedule on page 252 |
| » Working with “Stacked” Appointments on page 247 | » Creating Block-off Exceptions on page 255 |
| » Locating an Appointment on page 247 | |
| » Adding Appointment Notes on page 247 | |
| » Recurring Appointments on page 247 | |
| » Sizing Appointment Rows and Columns on page 249 | |

Displaying the Appointment Calendar

The AVImark Appointment Calendar enables you to view appointments by day, week, or month and it lets you see potential conflicts easily.

- On the CID, open the Work with menu. Click Appointments to display the Appointment Calendar window.

Change day, week and/or month

Day tabs for each of the days in the current week are available at the bottom of the calendar. However, this is not true for the Weekly, By Room view.

- Select one of the **Day Tabs** to display that day’s appointments.



- Use the red, week arrows to display appointments for a different week.



- Use the red, month arrows to display appointments for another month.



Work With the Activity Level Column

On the right side of the Appointment Calendar is the Scheduled Activity Level column. The column displays a date column for each date in the current month and an activity column which acts as a sort of barometer to show how busy you are for each of the days.

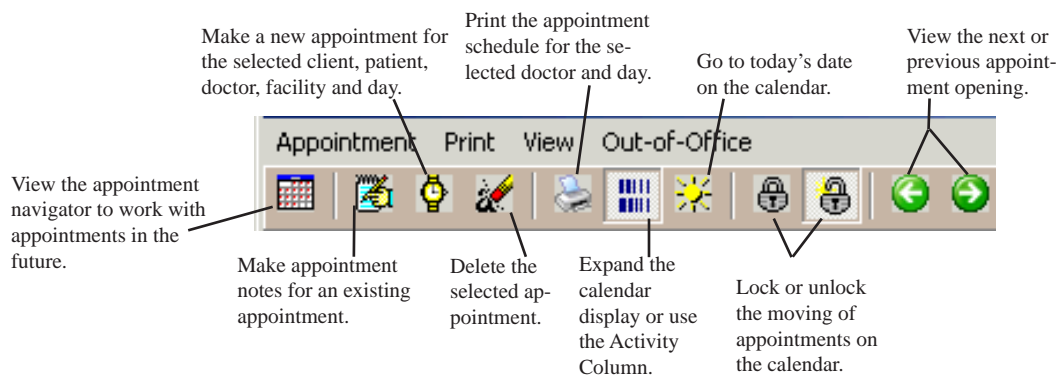
- Click **Refresh** at the bottom of the column to reflect the current appointments.
- Select any day in the date column to display the appointments for that day.



Set Up the Start Time and Appointment Increments

The set up for your daily start time and appointment increment will need to be defined from the Advanced Options area of Hospital Setup.

Toolbar buttons



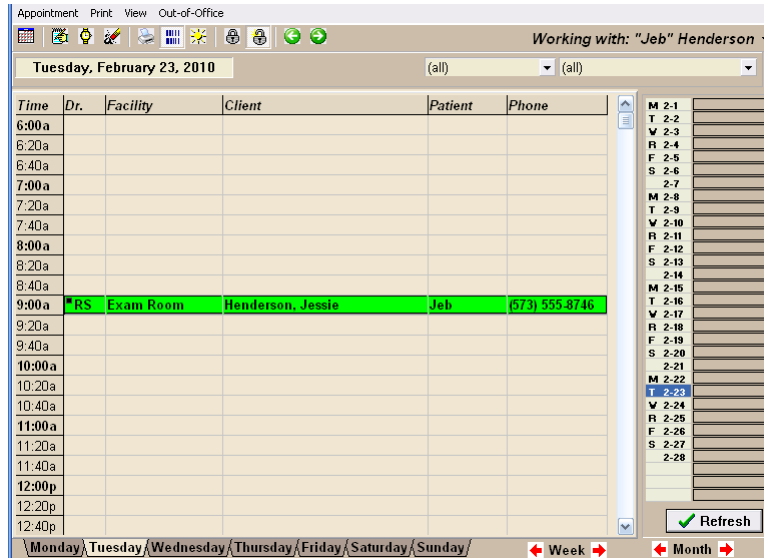
The View menu

Using the View menu, you will be able to select the way the AVImark Appointment Calendar is displayed.

- Ghosts
 This option allows you to preview appointments that have previously been marked as *No Shows*, deleted as having been *Cancelled* and/or *Kept*.

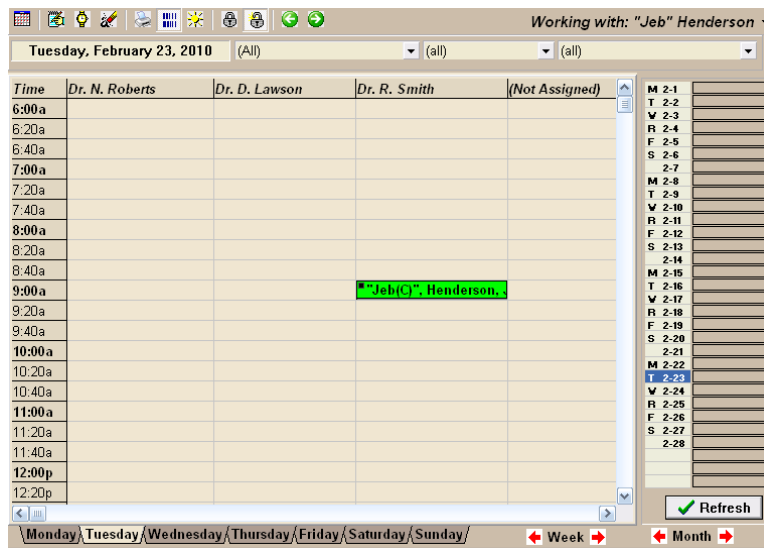
- Daily, Consolidated

Places the selected day's appointments for all doctors in all facilities in a stacked manner.



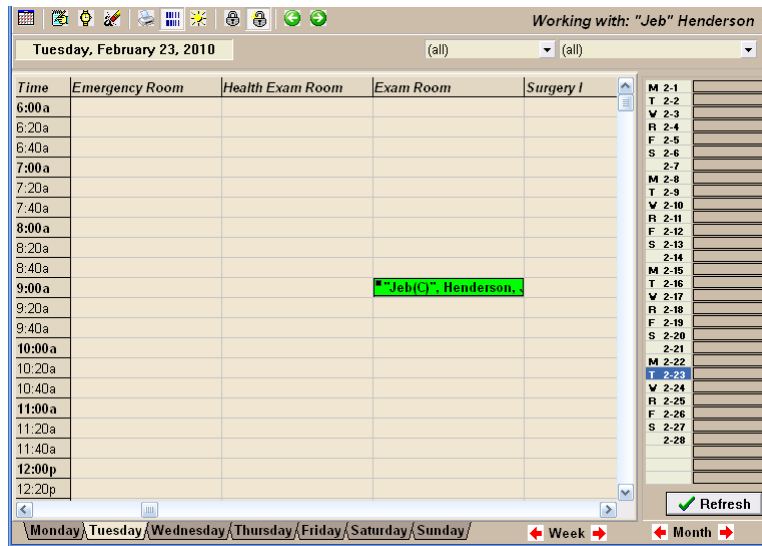
- Daily, by doctor

This option will show the appointments for all doctors for a specific day.



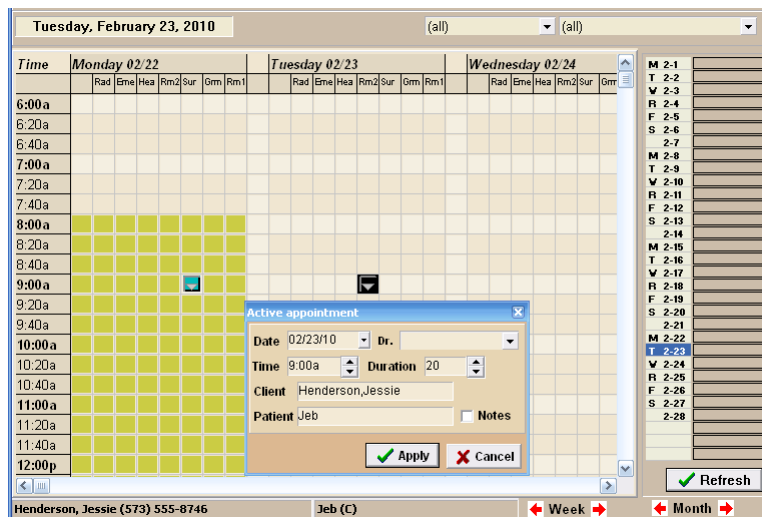
- *Daily, by room*

This option will show the appointments for all facilities for a specific day.



- *Weekly, by room*

This option will show the appointments for an entire week for each facility. Appointments will be displayed as colored blocks dependent upon the doctor for whom each appointment is made.



- *Appointment List*

This allows you to display a list of all appointments and/or ghost for a certain time frame. This may be restricted to specific doctors as well.

Customize columns in the Appointment List

You may arrange the columns in the appointment list in the order you would like them to appear. For a detailed discussion on customizing columns, refer to “CHAPTER 32: CUSTOMIZING COLUMNS”.

Sort the Appointment List

You may sort entries under each heading in the Appointment List window.

- Click the heading you wish to sort. Each click will sort the list in either ascending or descending order.


Preview text in the Appointment List

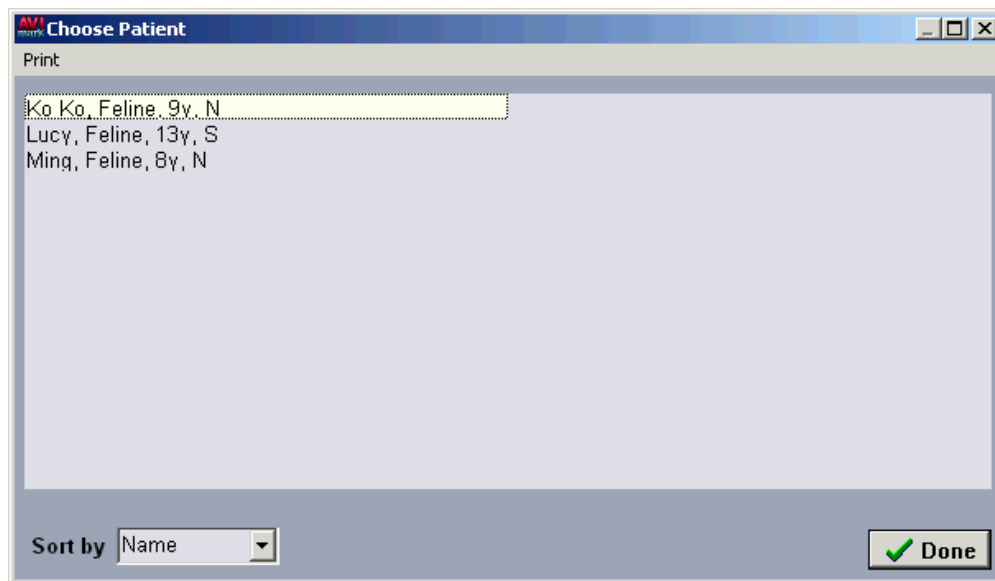
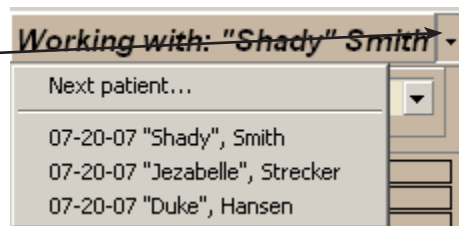
You may display notes attached to a patient's appointment.

- From the Appointment List window, **right-click** and from the shortcut menu point to **View** and click **Preview Text** to display the Columns window.
- Select the **Show Preview Text** option.
- Click **Notes** and then click **OK**.

Use the Working With menu

At the top right corner of the display, AVImark displays the current working client and patient's names.

- Click the  button just to the right of the patient's name to display a list of clients and patients you have been working with at this workstation.
- To select another patient belonging to this client, click **Next Patient** to display the Choose Patient window.



- Select the correct patient and click **Done**.

Setting up the Appointment Calendar

The AVImark Appointment Calendar has many options to make your individual preferences adaptable to the style of appointment handling best suited for your clinic. To set up the Appointment Calendar you will need to access the Advanced Options area of Hospital Setup.

Making Appointments

AVImark allows you to make appointments from the CID or from the Appointment Calendar.

From the CID

- With the correct patient displayed on the CID, open the **Work with** menu and click **Appointments**.

From the Calendar

- **Right-click** and from the shortcut menu click **Choose** to display the Client Selection window.
- Type the client information and click **Continue** to display the Choose Patient window.
- Select the correct patient and click **Done**.

Select the Appointment Date

AVImark gives you several options for selecting the correct appointment date.

- Choose the correct date by selecting the Day tab at the bottom of the calendar.

OR

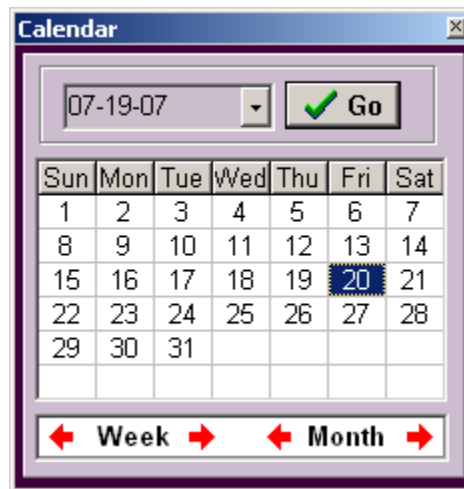
- Use the Weekly, By Room view with the calendar expanded to see any day of the current week.

OR

- Appointments being made during the current month, select the correct day from the Activity column.

OR

- Use the Appointment Navigator by selecting the  button to display the Calendar Navigator window.



Select the Appointment Time

- Select the row which displays the correct appointment time.
- **Right-click** and from the shortcut menu click **New** to display the New Appointment window.

Link Appointments

AVImark gives you the ability to link appointments for clients who own multiple patients as well as patients associated to a client using the Client/Patient Relations feature. You can now have appointments that are created for the same date, time, and room linked together to indicate that they all belong to or are associated to the same client. Once the appointment(s) are saved, all linked appointments will be listed/stacked with an icon indicating that they are linked. The **L** icon for the initial appointment created will be displayed in **RED** indicating that there are linked appointments to this original appointment. All linked appointments will display a **BLUE L** icon. Creating linked appointments will also allow a prompt to be displayed if changes made to one appoint-

ment should update all linked appointment as well.

- Create the first appointment as discussed in the topic, “*Make Appointments*” on pag22831.
- With the new appointment selected on the Appointment Calendar, **right-click** and from the shortcut menu click **New Linked Appointment** to display the Selected Patients window.
- On the Selected Patients window, select the patient from the list you wish to link to the originally created appointment.
- Use the SPACEBAR to place the patient into the **Selected** area and click **Done** to display the New Appointment window.

Grouping Appointments

When in the Daily by Doctor view you will be able to display the Doctor columns by user-defined groups. First the appointment groups must be created.

- From the CID **Work with** menu select **System Tables**.
- Highlight the Appointment Groups category and under the Entries section select **New** from the **right-click** shortcut menu.
- Enter a **Code** and enter the group name in the **Description** field.
- Click **OK** to add the group.
- Continue to add the number of necessary groups and click **Done** to close System Tables.


Next the appointment groups will need to be associated with the appropriate staff members.


- From the CID **Work with** menu select **Users & Security**.
- Select the appropriate user group and staff member.
- **Right-click Change** from the shortcut menu to open the Change User window.
- Click on the **Group** drop-down list to select the appropriate appointment group for this user. A group will need to be linked for each appropriate doctor or staff member that appears in the Daily, by Doctor view.
- Click **Ok** to save your changes.

After the groups have been created and assigned to users appointments can be viewed by doctor groups.

- In the Appointment Calendar you must be in the Daily, by Doctor view.
- In the second drop-down field change the view from All to the desired appointment group. Only doctors within the selected group will be displayed.

Use the Appointment Openings Feature

AVImark can assist you in selecting a date and time for the appointment by using the  button which will take you to the first available appointment within each time period or by using Appointment Openings feature.

- On the calendar, open the **View** menu and click **Openings** to display the Appointment Openings window.
- On the Appointment Openings window, you will notice the default date range from the current date through the first day of the month after next. If appropriate, use the drop-down calendar to select the date range you wish.
- Use the drop-down menus and select the appropriate **Doctor** and **Room**.
- If appropriate, use the  button to select the **Minimal Duration** of the opening.

- Select the appropriate opening line and click **Done** to be returned to the Appointment Calendar for the period selected.

Print the Appointment Openings report

- On the Appointment Openings window, open the **File** menu and click **Print** to display the Print Appointment Openings window.
- Specify the **Date range**, **Doctor**, **Room** and **Minimum Duration** using the appropriate drop-down lists.
- Click **Print** or to preview the report onscreen, click **Preview**.

Email the Appointment Openings report

- On the Print Appointment Openings window, click **Preview** to display the Report Preview.
- Open the **File** menu and click **Email**.
- Enter the email address, the desired subject and text and click **Send**.

Save the Appointment Openings report

- On the Print Appointment Openings window, click **Preview** to display the Report Preview.
- Open the **File** menu and click **Save As**. The report can be saved as a PDF, HTML, RTF, TXT or NDR file.

Exporting the Appointment Openings Report to Excel®

- On the Print Appointment Openings window, use the **Print To** drop-down list and select **Excel®**.
- Click **Print** to display the report in Excel® format.

Working with the Appointment Window

Whether making a new appointment or changing values for an already existing appointment, the method for doing so will be the same.

- On the Appointment Calendar, open the **Appointment** menu and click either **New** or **Change** to display the New/Change Appointment window.
- The New Appointment window will display the current client and patient as well as the default doctor if one had been selected. To choose a different doctor, use the **Doctor** drop-down list and select the correct doctor.

Select the Correct Room

- If appropriate, use the **Room** drop-down list and select the correct room.

Choose Treatments, Items, Diagnosis and/or Problems for the appointment

You may select one or more treatments, inventory items diagnosis or problems to be scheduled for the appointment

- In the TX, Items, DX and Problems area, **right-click** and from the shortcut menu point to **Choose** and click **Treatments, Inventory, Diagnosis and/or Problems** to display the appropriate list.
- Select the correct service or item and click **Done** to return to the New/Change Appointment window.

Type

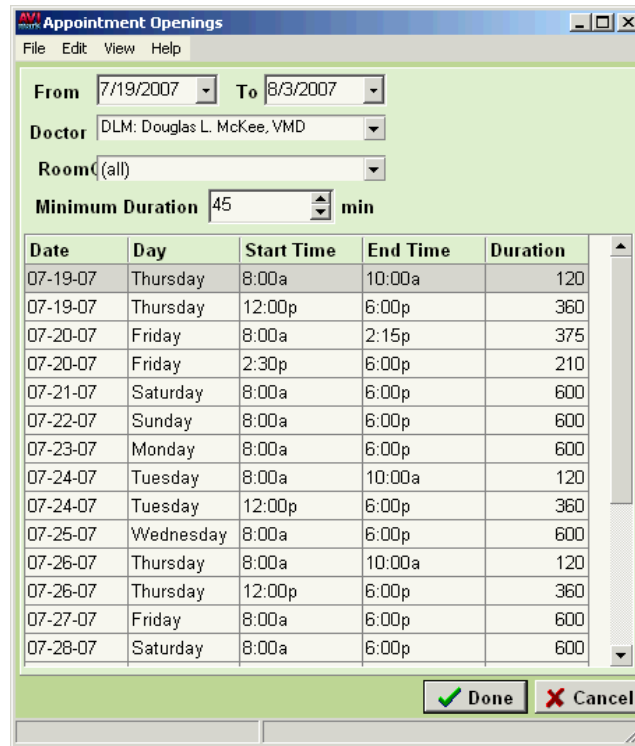
The Type area can be used to customize the display color of the appointment by associating an appropriate type. For example you can choose whether it is an examination, surgery or vaccination appointment and assign a

color. These types can be defined in System Tables or directly from the New Appointment window.

- Click on the **Type** drop-down list to choose an appropriate type.
 The appointment will appear in the associated color.

OR

- Click on the **Page Plus Symbol** icon to create a type.
- Enter a **Code** and **Description** then choose the custom **Color**.
- Click **OK** to add the new type and have AVImark automatically select it for this appointment.



Reminders


Reminders for the selected patient will be displayed in the New/Change window. You may also view those reminders which are coming due or are past due within 60 days of the appointment date.

- In the Reminders area, **right-click** and from the shortcut menu click **All Due 60 days**. This will place those reminders due in the **Treatments and Items** area.

Make the next patient's appointment

AVImark lets you make an appointment for other patients belonging to the client without leaving the New/Change Appointment window.

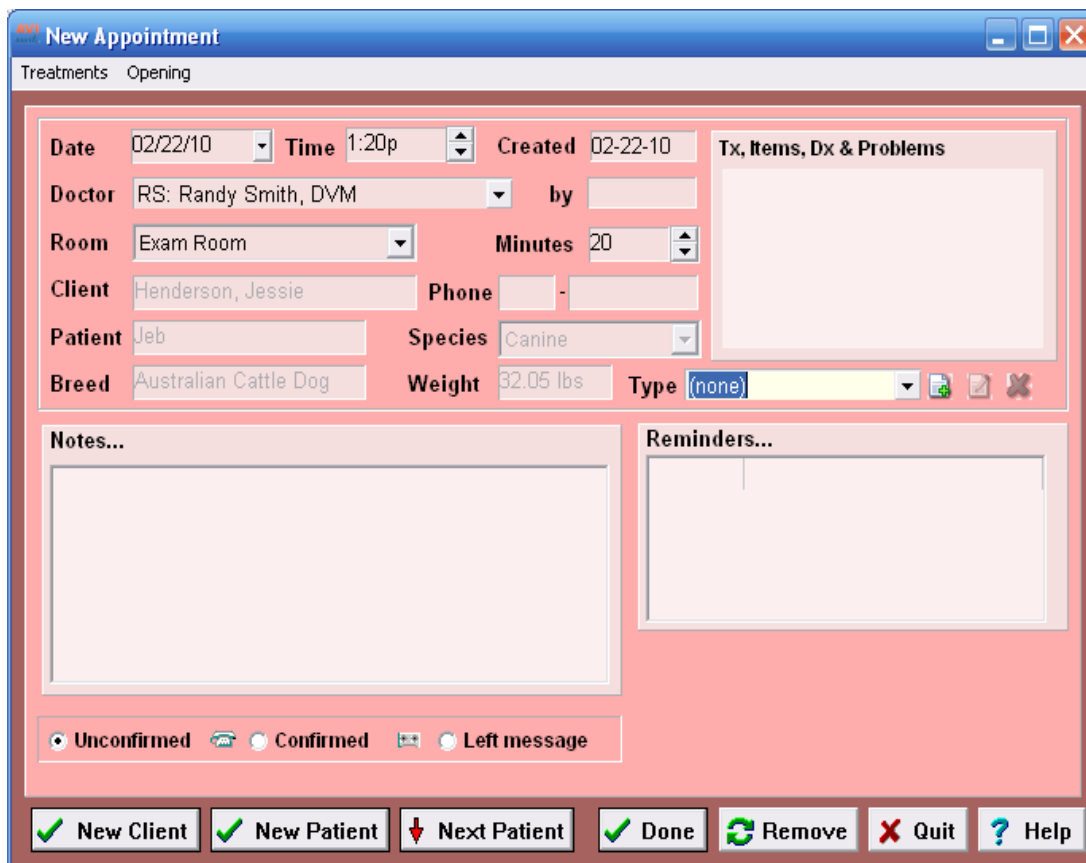
- Click the **Next Patient** button to display the Choose Patient window.
- Select the correct patient and click **Done** to return to the New/Change Appointment window.
- Click **Done** once all appointment information has been added or click **Remove** to remove the appointment.

	To learn more about:	Search the Help for:
	Make Appointments – CID	Making Appointments
	Appointment Navigator	Making Appointments
	View Openings	Appointment Openings
	New/Change Appointment Window	New Appointment Window

Appointments for New Clients

AVImark allows you to quickly make an appointment for a potential client, without having to create a complete client/patient file. Use this feature to avoid unnecessary phone time and cluttering your files with first time, *no shows* whose files must then be deleted.

- On the Appointment Calendar, select the correct **date**, **doctor**, and **time** as you normally would for an appointment.
- **Right-click** and from the shortcut menu click **New** to display the New Appointment window.



- Click **New Client**. This will place your cursor in the Client field to allow you to enter the client's name, phone, patient name, and species.
- Once all appointment information has been entered click **Done**. The new client's appointment will display on the calendar with a **New, Sunrise** image.
- When the client arrives for their appointment, select their appointment on the calendar.
- **Right-click** and from the shortcut menu click **Check-in**.
- You will need to click **Yes** to confirm and display the New Client Information window.
- Enter the client information and click **Done**.

Appointments for New Patients

You are able to make an appointment for a new patient from the New Appointment window. This may be helpful when you would like to make an appointment for a new patient belonging to the selected client.

- On the Appointment Calendar, select the correct **date**, **doctor**, and **time** as you normally would for an appointment.
- **Right-click** and from the shortcut menu click **New** to display the New Appointment window.
- Click **New Patient** and enter the patient's name and appropriate species.
- Click **Done** to return to the Appointment Calendar.

OR

- On the Appointment Calendar, select the correct **date**, **doctor**, and **time** as you normally would for an appointment.
- Select the **Working with Menu Arrow** at the top right corner of the calendar.
- Click **Next patient** to display the Choose Patient window.
- Select **new patient** and click **Done**.
- You will need to click **OK** to confirm adding a new patient.
- Enter the patient's name and appropriate species and click **Done**.

Working with “Stacked” Appointments

There may be times when you wish to schedule more than one appointment for the same doctor at the same time or multiple appointments in the same room by different doctors. Depending upon the *view* that you have chosen to use, these concurrent appointments will be displayed as *stacked*, one upon the other.

- Select the appointment that is currently being displayed. **Right-click** and from the shortcut menu click **Bring To Front** to rotate through the other appointments.

Locating an Appointment

- With the correct patient selected on the CID, click the button to display the patient's appointment on the calendar.

Adding Appointment Notes

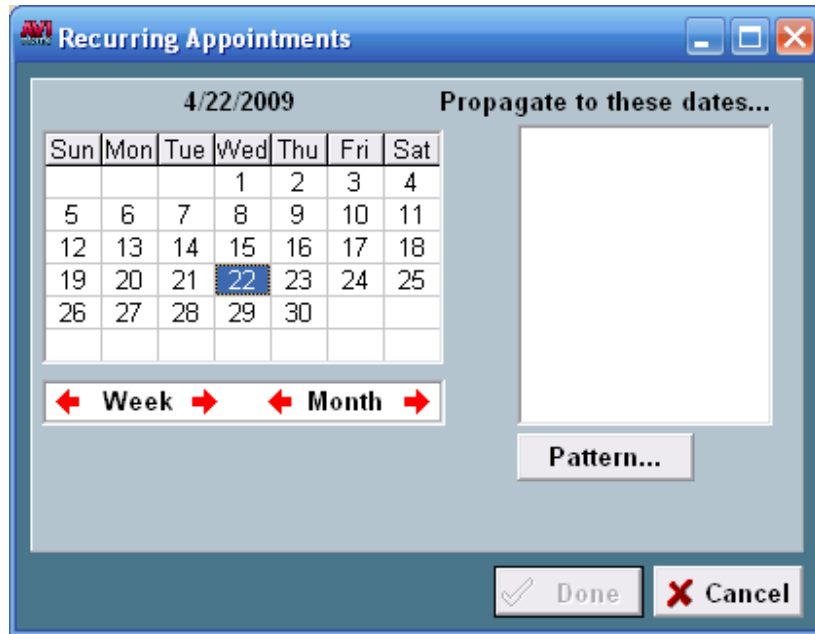
You may specify unlimited notes for any appointment that has been added to the Appointment Calendar.

- With the correct appointment selected, **right-click** and from the shortcut menu click **Notes** to display the Appointment notes window.
- Type the appropriate notes for the appointment and click **Done**. You may use any of the AVImark notes features.

Recurring Appointments

AVImark allows you to recreate identical appointments on several different days along with all of the appropriate treatments and notes. In addition, you may wish to use a Pattern Option.

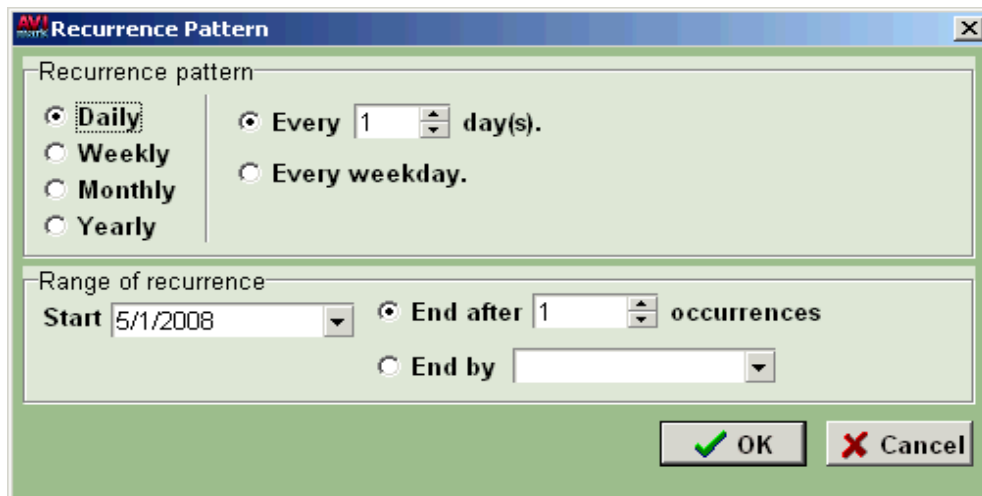
- With the correct appointment selected, **right-click** and from the shortcut menu click **Recurring Appointments** to display the Recurring Appointments window.



- Select the appropriate day(s) from the calendar to Propagate to those dates and click **Done**.

The Pattern Option

- Click **Pattern** for recurring appointments that are Daily, Weekly, Monthly, or Yearly. All Pattern options must have the number of occurrences specified and an ending date of the last occurrence.



Daily option

- **Every 1 day(s)** - Specify how many days should pass before the appointment should recur for the number of occurrences specified.
- **Every Weekday** - Select the week day the appointment will be scheduled for the number of occurrences specified.

Weekly option

- **Recur Every 1 Week(s) on** - Specify how many weeks should pass before the next appointment occurs for the number of occurrences specified.

- **Week day option** - Select the day of the week you want the appointment to recur for the number of occurrences specified.

Monthly option

- **Day 1 of every 3 month(s)** - Specify the day of the month and then number of months that should pass before the appointment recurs.
- **The First Sunday of every 1 month** - Select the First, Second, Third, Fourth, or Fifth Sunday through Saturday of the month and the number of months that should pass before the appointment recurs.

Yearly option

- **Every January 1** - Specify the day of the year the appointment should recur.
- **The First Sunday of January** - Select the First, Second, Third, Fourth, or Fifth Sunday through Saturday of a selected month the appointment should recur.

Sizing Appointment Rows and Columns

AVImark lets you enlarge the vertical space that an appointment row occupies, as well as the horizontal space that an appointment column occupies. This feature works in the Daily views of the calendar, not the Weekly, by room view.

Appointment rows

- Place the mouse pointer on the line below the time increment, in the time column.
- When the pointer becomes a double line, hold the left mouse button and move the line downward to enlarge the area the row occupies.

Appointment columns

- Place the mouse pointer on the line between the column headings at the top of the calendar display.
- When the pointer becomes a double line, hold the left mouse button and move the line left or right to re-size the column.

Checking In an Appointment

When an appointment is kept, you are able to remove the appointment from the calendar display and at the same time post any treatments selected for the appointment into the Medical History Area of the patient. Once the patient has been checked in they will appear on the Checked in tab of the Whiteboard. Any services attached to the appointment can be added to the Schedule tab of Whiteboard at the time of check in.

- Select the correct Appointment Reservation from the patient's Schedule Folder tab.
- **Right-click** and from the shortcut menu click **Check-in**.

Confirming an Appointment

AVImark allows you to document the fact that you confirmed appointment dates and times with clients.

- With the correct appointment selected **right-click** and from the shortcut menu click **Change** to display the Change Appointment window.
- Select **Unconfirmed**, **Confirmed**, or **Left Message** and click **Done**.

Deleting an Appointment

- With the correct appointment selected **right-click** and from the shortcut menu click **Remove** to display the Remove Appointment window.



- Select the appropriate option and click **Done**.

Return to the CID

AVImark allows you to return to the CID for the selected patient from the Appointment Calendar.

- **Right-click** and from the shortcut menu click **Patient**.

Scheduling Next Appointment

Remembering to schedule the next or a follow-up appointment for a patient before that client and patient leaves is often difficult. To prevent this from happening or to assist in this situation there is a Hospital Setup option that will prompt for creating the next appointment.

- From the CID Hospital Setup Advanced Options Maintenance window search for **Schedule Next Appointment Prompt**.
- Setting the value to Check Out, CID Posting, Taking Payment or Closing Invoice will cause a prompt to be displayed at the selected timing asking if you wish to create the next appointment.
- Selecting Yes to the message will display the Appointment Calendar allowing a new appointment to be made.

Moving Appointments

AVImark allows you to move existing appointments to another time and date using either the drag-and-drop method or manually changing the date and time.

Drag-and-Drop method

- Place your cursor on the appointment to be moved.
- Holding the left mouse button down, drag the appointment to the new time and then release it.

Manual date and time change

You may change an appointment time and date from either the Appointment Calendar or the CID.

- From the Appointment Calendar, select the correct appointment.
- **Right-click** and from the shortcut menu click **Change** to display the Change Appointment window.
- Make the appropriate changes and click **Done**.

OR

- On the CID, select the **Schedule Folder** tab.

- Double click on the correct appointment to display the Change Appointment window.
- Make the appropriate changes and click **Done**.

Quick Edit window

When using the Weekly, By Room view, AVImark allows you to manually change information.

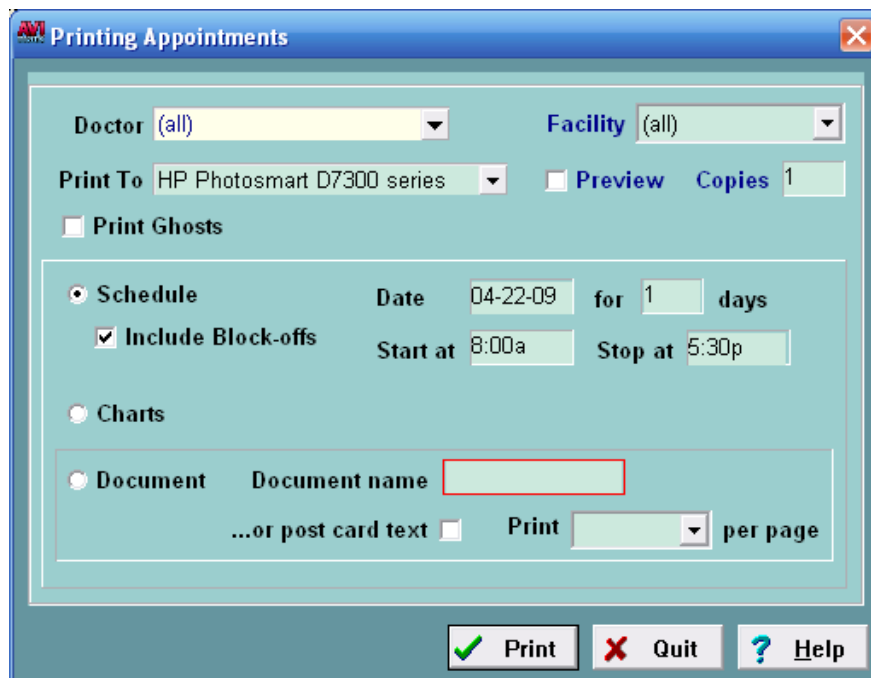
- On the Appointment Calendar, select the correct appointment.
- **Right-click** and from the shortcut menu click **Quick Edit** to display the Active Appointment window.
- Make the appropriate changes and click **Apply**.

Rescheduling Appointments

- On the Appointment Calendar, select the correct appointment.
- **Right-click** and from the shortcut menu click **Reschedule Appointment**.
- With the desired date and time selected, **right-click** and from the shortcut menu click **Reschedule**.
- Make any necessary changes on the New Appointment window and click **Done**.

Printing the Appointment Schedule

- On the Appointment Calendar, open the **Print** menu and click **Print Appointments** to display the Printing Appointments window.



- Using the drop-down lists, select the correct **Doctor**, **Facility** and **Printer**.
- Select **Print Ghosts** to include kept, rescheduled, removed, cancelled and late appointments on the printed schedule.
- Select the corresponding boxes for the items you wish to print.
- If appropriate, double click in the Document name field to display the Open window.
- Select the appropriate document.
- Click **Print**, or to preview the schedule on screen select the **Preview** check box and click **Print**.

- In the **From** and **To** fields, use the up and down arrows to choose the time period.
- Using the **Start** and **End** drop-down calendar, select the **Start** and **End** dates.
- Type the **Reason** for the block-Off.
- If you did not previously choose a staff member and it is necessary to select one now simply click on the **Doctor** drop-down to select the doctor or staff member or leave it set to **(all)** to apply the block-off to everyone.
- If the block-off applies to a specific room or facility click on the **Room** drop-down and choose the appropriate room.
- The **Type** area can be used to customize the display color of the block-off by associating an appropriate type. For example you can choose whether it is a meeting, vacation days, lunch block-off, etc. These types can be defined in System Tables or directly from the New Blockoff window.
 - Click on the **Type** drop-down list to choose an appropriate type. The block-off will appear in the associated color.

OR

- Click on the **Page Plus Symbol** icon to create a type.
- Enter a **Code** and **Description** then choose the custom **Color**.
- Click **OK** to add the new type and have AVImark automatically select it for this block-off.

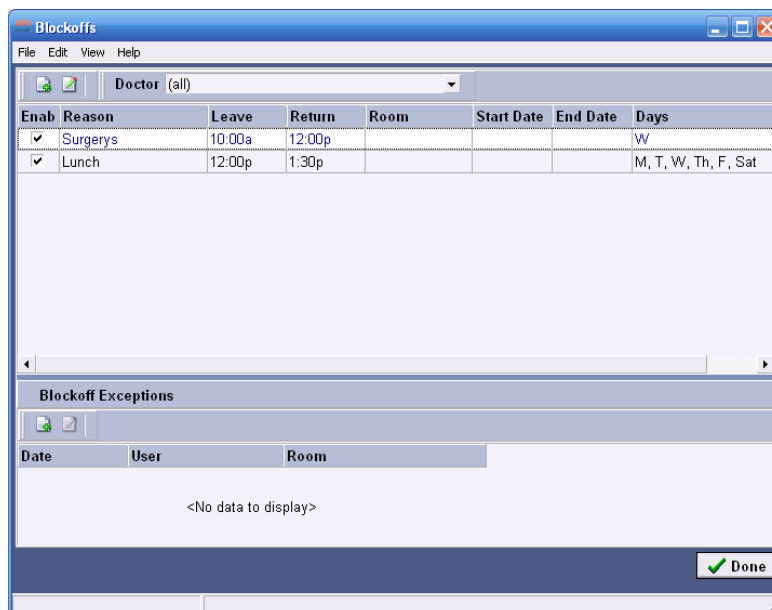
Apply weekly

- If appropriate, select the **Apply weekly** option.
- Select the appropriate days of the week that the times specified apply to and click **Done**.

Apply monthly

In addition to out-of-office days and times that you have applied weekly, you are also able to add and apply other out-of-office schedules on a monthly basis.

- If appropriate, select the **Apply monthly** option.
- Select the days of the week for each week of the month and click **Done**.





The first week column will represent the first week in the month (Sunday through Saturday), even if there is only one day in the first week

Print Block-off Report

A block-off report can be printed and it will list each doctor's block-offs.

- In the Blockoffs window choose **File, Print** from the menu.
- Click **Print** to print the report or select **Preview** to view the report on screen.

Block-Off notes

AVImark lets you enter notes relating to any block-off on the appointment calendar. This is done from the calendar, not from the block-off setup window.

- On the Appointment Calendar, select the correct block-off.
- **Right-click** and from the shortcut menu click **Notes** to display the Notes window.

Daily (ad hoc) block-offs

You may block off days and times on an ad hoc basis from the appointment calendar. When using the Weekly, By Room view, you will see a status bar at the bottom of the calendar indicating the reason for the block-off.

- Select the correct date and time you wish to add the block-off for.
- Open the **Out-of-Office** menu and click **New Block-off** or **right-click** and from the shortcut menu click **New Block-Off** to display the Daily Block-Off window.
- In the **From** and **To** fields, use the up and down arrows to choose the time period.
- Type the **Reason** for the block-off and, if appropriate, use the drop-down lists to select the **Doctor** and/or **Room**.

Date 02/22/10 **From** 8:00a **To** 8:00a

Reason _____

Doctor RS: Randy Smith, DVM

Room (all) **Block-off is an alert**

Type (none)

Date

2/22/2010 Propagate to these dates...

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

← Week → ← Month →

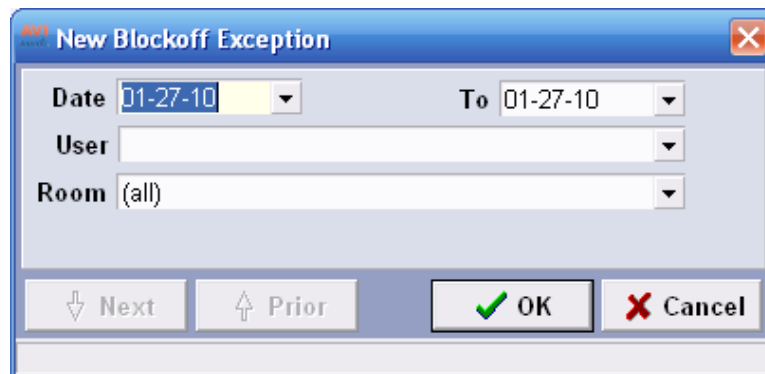
Done Cancel Help

- The **Type** area can be used to customize the display color of the block-off by associating an appropriate type. For example you can choose whether it is a meeting, vacation days, lunch block-off, etc. These types can be defined in System Tables or directly from the New Blockoff window.
 - Click on the **Type** drop-down list to choose an appropriate type. The block-off will appear in the associated color.
- OR
- Click on the **Page Plus Symbol** icon to create a type.
 - Enter a **Code** and **Description** then choose the custom **Color**.
 - Click **OK** to add the new type and have AVImark automatically select it for this block-off.
- Use the calendar to select the other days this block-off applies to for this month.
 - If appropriate, use the **Month Arrows** to apply this block-off to other months.
 - If appropriate, select **Block-off is an alert** to display any notes previously entered for the block-off and click **Done**.

Creating Block-off Exceptions

Instead of removing the entire scheduled block-off, exceptions can be made for that staff member and room. Exceptions can be made directly from the calendar or in the Blockoffs window.

- Highlight the scheduled block-off in the Appointment Calendar, **right-click** and from the shortcut menu select **Remove**.
- In the **New Block-off Exception** window select the **Date**, **User** and **Room** the exception is for.
- Click **OK**. The block-off will be removed for only the time period specified and for only that doctor and room on the selected day.



OR

- From the Calendar menu select **Out-of-Office, Schedule**.
- Under the Blockoff Exceptions area of the Blockoffs window, **right-click** and from the shortcut menu select **New**.
- In the **New Block-off Exception** window select the Date, User and Room. Click **OK**.
- Multiple exceptions can be made for the selected block-off.
- Click **OK** on the Exceptions window after the exceptions have been created.



To learn more about:

- Out of Office Schedule
- Daily Block-offs
- Block-off Alerts
- Block-off Notes
- Block-off Exceptions

Search the Help for:

Out of office

CHAPTER 18: BOARDING CALENDAR

AVImark allows you to define your boarding and hospitalization facilities with regards to the number of occupants, species, weight range, boarding charges per weight range and whether you charge by day or by night with or without a check-out time. AVImark also lets you organize your different boarding facilities into “Facility Groups” which have similar capacity, function and charging rate characteristics. You may define unlimited Facility Groups and unlimited facilities in each group. Facilities and patient reservations are displayed on one screen and you have the ability to move patients as well as reservations from cage to cage. Facilities may be reserved for a patient for later check-in or patients may be checked-in to a facility as soon as they arrive. Once the patient is checked in they will appear in the Whiteboard. Services for checked-in patients may be added, viewed, printed, and posted to Medical History from the Whiteboard Schedule tab.

In this chapter you will learn about...

- » Charge for Boarding on page 257
- » Change Boarding Calendar Views on page 258
- » Add and Define Facility Groups on page 259
- » Add New Facilities on page 261
- » Make and/or Change a Reservation on page 261
- » Make a Reservation using the CSD on page 262
- » Make a Reservation for a New Patient on page 262
- » Work with the New Reservation Window on page 263
- » Check-In with a Reservation on page 264
- » Check-in an Out-Patient on page 265
- » Add Services to a Check-In on page 265
- » Change a Check-In on page 265
- » Delete a Reservation or Check-In on page 266
- » Check-Out on page 266

Charge for Boarding

AVImark needs to know whether you charge clients for boarding according to overnight stay or by day with or without a check-out time. You will need to specify how you will charge for boarding in Hospital Setup, Advanced Tab, Boarding. In addition, it is assumed that you have certain treatments in your Treatment List set up for boarding charges at different weight ranges with a price defined for each service; for example, “Boarding, less than 25 lbs” or “Board per day, 30-50 lbs”. AVImark gives you several options with regards to boarding charges.

Charging by overnight stay without a checkout time specified

If you charge by overnight stay WITHOUT a check out time specified, AVImark will simply add a boarding charge for every night the patient spends in the facility. If the patient is checked out before the end of the first day, AVImark will not charge for the stay.

Charging by overnight stay with a checkout time

If the patient is checked into a facility BEFORE the check out time and checked out BEFORE the check-out time on the SAME day, AVImark will not charge for the visit. If the patient is checked into a facility BEFORE the check out time and checked out at least an hour AFTER the check out time on the SAME day, AVImark will charge ½ of the normal boarding charge. If the patient is checked into a facility at any time on one day and checked out prior to an hour AFTER the check-out time on the NEXT day, AVImark will charge the normal boarding Charge. If the patient is checked into a facility at any time on one day and checked out at least an hour AFTER the check out time on the NEXT day, AVImark will charge 1 ½ times the normal Boarding charge.

Charging by overnight stay with a checkout time like a hotel

If the patient is checked into a facility BEFORE the check out time and checked out within an hour AFTER the

check out time on the SAME day, AVImark will not charge the client. If the patient is checked into a facility BEFORE the check out time and checked out at least 1 hour AFTER the check out time on the SAME day, AVImark will charge ½ the normal boarding charge. If the patient is checked into a facility at any time on one day and checked out prior to 1 hour AFTER the check out time on the NEXT day, AVImark will charge the normal boarding Charge. If the patient is checked into a facility at any time on one day and checked out at least 1 hour AFTER the check out time on the NEXT day, AVImark will charge 2 times the normal boarding Charge.

Charging by day with checkout time

If the patient is checked into a facility BEFORE the check out time and checked out prior to 1 hour AFTER the check out time on the SAME day, AVImark will add ½ the boarding charge. If the patient is checked into a facility BEFORE the check out time and checked out at least 1 hour AFTER the check out time on the SAME day, AVImark will add a boarding charge. If the patient is checked in on one day and out on the next day prior to 1 hour AFTER check out time, AVImark will add 1 ½ the boarding charges. If the patient is checked in on one day and out on the next day at least 1 hour AFTER check out time, AVImark will add 2 boarding charges.

Weight-based pricing

If you intend to use the AVImark Weight-based pricing feature to handle different rates for different weight ranges, you should only have one boarding service in your Treatment List. Adjust the Weight Percentage in such a way as to charge an appropriate amount for each patient weight.

Change Boarding Calendar Views

- AVImark gives you various ways of changing the appearance of the Boarding Calendar. From the Boarding Calendar, open the **View** menu.

Ghosts

Selecting the Ghosts view will allow you to see all past reservations (in gray) and how they have been classified: Kept, Canceled, or No Show. If a given reservation was deleted, it will not be displayed as a “ghost”.

Patient names

Selecting the Patient names view, AVImark will include the patient’s name in the reservation bar on the calendar.

Choose facility

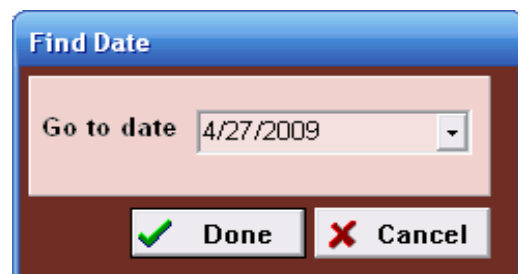
This option allows you to locate an appropriate facility for the patient being boarded. AVImark will locate the first appropriate facility according to the way you have defined each Facility Group. For instance, if you came to the Boarding Calendar from the CID of an 80 lb. canine, AVImark will automatically move the cursor to the top-most facility for a canine of this weight. However, if you have moved the cursor around on the display to other facilities and/or facility groups, selecting “Choose facility” will always move the cursor back to an appropriate facility for this patient.

Find next

This option allows you to quickly move to the next scheduled reservation for the selected patient. If there is no other reservation made for that patient, AVImark will move to the next reservation for another patient belonging to the same client.

Go to date/F10

This option allows you to move quickly to another date. Each time you open the “Go to date” window it will default to the current date, allowing you to quickly return to that day’s schedule.



Refresh

The Refresh option is used to update the boarding information currently displayed in the window. Refreshing the Boarding Calendar prior to creating a new reservation ensures you are viewing the most current changes made by other staff members on other workstations to prevent overbooking. The AVImark program automatically updates or refreshes every five seconds. However, if you and another staff member are creating reservations at the same time, it is possible that the information entered on the other workstation may not be displayed quickly enough for you to notice it.

Toggle CID/Boarding

This feature will allow you to toggle back and forth between the Boarding Calendar and the patient’s CID.

1 Week, 2 Weeks, 3 Weeks

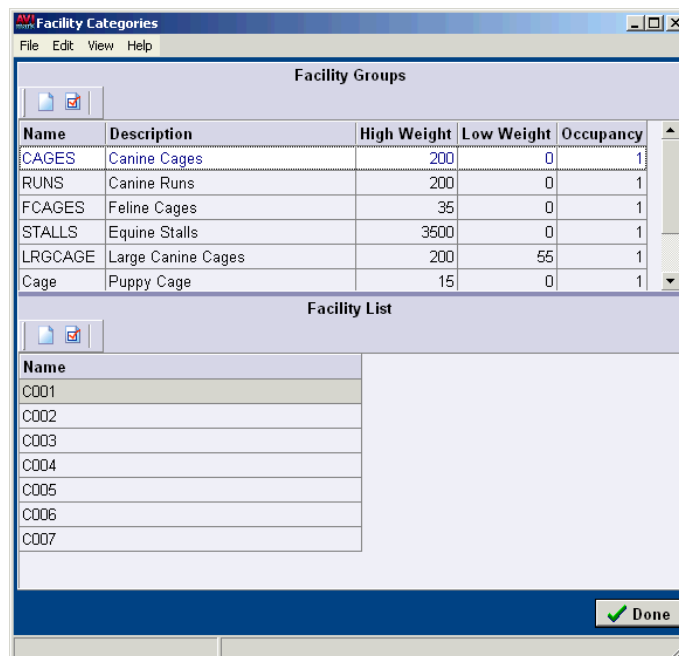
AVImark allows you to set the default display of the Boarding Calendar as 1, 2, or 3 weeks at-a-glance.

	To learn more about:	Search the Help for:
	Boarding Treatments with Prices Boarding Calendar Options	Facility groups; Boarding facilities Appointments tab

Add and Define Facility Groups

You will define your Facility Groups and set up the individual facilities of each group (cages, pens, runs, and so on) from the Boarding Calendar itself. Facilities added under each Facility Group will obey the definition defined for that facility group. For example, if you define a certain Facility Group as receiving only Canine patients, the automatic scheduling feature of AVImark will not automatically assign a Feline to any facility of this group. Likewise, if an “Occupancy” value for a Facility Group is set to 2, once all the facilities of this type are full, the automatic scheduling feature will try to assign a patient to another facility group. Of course you may over-ride this automatic scheduling manually by moving the patient’s reservation to one of your choice. Charges assessed when patients are checked in and out of a facility will obey whatever definition has been made for the Facility Group it belongs to.

- On the Boarding Calendar, open the **Work With** menu. Click **Facilities** to display the Facility List window.



- Point in the Facility Groups section. **Right-click** and from the shortcut menu click **New** to display the Change Facility Category window. You may use the TAB key to move from one field to another.

Species	Weight	Boarding	Hospitalization	(Other)

Name

- Type a **Name** for the new Facility Group.

Description

- Type a **descriptive** name for the Facility Group.

Min/Max

- Specify a **Min** and **Max** weight range for the Facility Group by using the UP and DOWN ARROWS.

Occupancy

- Using the UP and DOWN ARROWS, enter the maximum number of occupants this type facility will normally handle.

Species

- Type in one of the species names which will use this Facility Group.

Weight

When entering the weight, it is important that you assign weight ranges from the least to the greatest with the minimum weight being at the top of the list and the heaviest at the bottom. For example, if one of your boarding services were something like, “Boarding, less than 20 lbs.”, you would put it on the top line. The next line might be for a service called, “Boarding, 21-40 lbs.” and the third line might be “Boarding, 41-60 lbs.”, and so on.



If you intend to use the AVImark weight-based pricing feature to handle different rates for different weight ranges, you should only have one boarding service in your Treatment List for each species.

- Type the **Weight** for this entry. Enter as a whole number without specifying a unit of measure.

Boarding, Hospitalization, Other

You may add a different code for those patients who are *Boarding*, being *Hospitalized*, or *Other*. This will allow you to use different charges for different types of reservations. The user may select the type of reservation needed when the patient is checked into the Boarding Calendar. When a Check-in is attempted, a sub-list will appear with the options of *Boarding*, *Hospitalization*, and *Other*.

- Enter the Treatment Code for the weight range as specified in your Treatment List.
- When finished entering species, weight and boarding codes appropriate for this Facility Group, click **Done**.

Add New Facilities

For each Facility Group, you may add as many facilities into the Facility List section of the display as you wish.

- With the appropriate Facility Group selected, point in the **Facility List** section.
- **Right-click** and from the shortcut menu, click **New** to display the New Facility window.
- Type a **Name** and **Description** for the new facility.
- If appropriate, use the **Category** drop-down list to change the category and click **OK**.

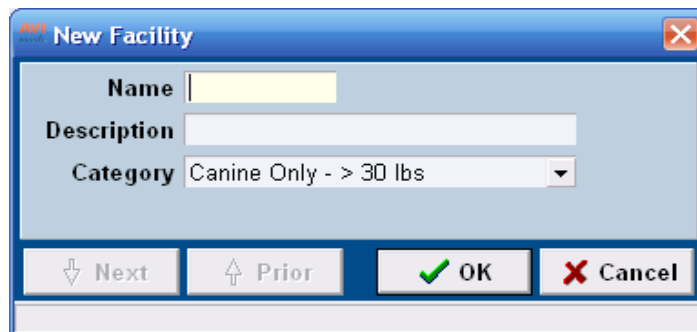
	To learn more about: Boarding Facilities	Search the Help for: Adding / Changing Facility Groups
---	--	--

Make and/or Change a Reservation

When a client calls to make an appointment for boarding, you will need to know which facilities are available. AVImark will help you by assigning the patient to the first available facility as set for its species and weight range in your Facility Group definitions.

Make a reservation

- With the correct patient selected on the CID, open the **Work with** menu. Click **Boarding Calendar** to display the Boarding Calendar with the client and patient’s names listed at the bottom right corner of the display.
- The cursor will be placed in a facility that is appropriate for the patient. If necessary, click another facility line in the date column for the day the client intends to bring the patient in.
- **Right-click** and from the shortcut menu, click **New** to display the New Reservation window.



Change a reservation

- On the Boarding Calendar, click on an existing reservation to display the Reservation window.
- Make the appropriate changes and click **Apply**.

OR

- On the CID, click the **Schedule Folder** tab to display the Board Reservation entry.



- Double-click the correct board reservation entry to display the Reservation window.
- Make the appropriate changes and click **Apply**.

Make a Reservation using the CSD


AVImark allows you to make a boarding reservation from the Client Selection Display.

- On the Boarding Calendar, select an appropriate facility and reservation date.
- Use the **ESC** key to display the CSD.
- In the Patient field, type the name of the patient and click **Continue**.
- Double-click the correct client/patient from the list to display the Boarding Calendar and make the reservation for the selected date.

Make a Reservation for a New Patient

AVImark allows you to make boarding reservations for new patients not yet entered in your database. You will be able to set up information about the new patient prior to the visit and when the patient is checked in they will automatically be added. In addition, you may also set up information pertaining to a new client in the same fashion.

- On the Reservation window, click **New Patient** and/or **New Client** to display the New Client/Patient Information window.
- Enter the appropriate information and click **Done** to place the reservation on the calendar.

	To learn more about:	Search the Help for:
	Make/Change a Reservation	Make reservation

Work with the New Reservation Window

AVImark lets you work with a window that displays available vacancies for any date range. This window is useful for making future reservations when it is necessary that you know more information about which facility might be the most appropriate for a given patient. Furthermore, this window lets you view information about facilities without paging up and down through the calendar.

- On the Boarding Calendar, open the **View** menu. Click **Choose Facility** to display the New Reservation window.



In date/Out date/Duration

These fields are used to set the beginning and ending date of the reservation, as well as the duration of boarding. When you set an “In Date” and the “Duration”, AVImark will automatically enter the “Out Date” for you.

- Using the drop-down calendar, select the **In Date**.
- Using the drop-down calendar select the **Out Date**, or simply enter the number of days in the **Duration field**.

Client

This field indicates the current client displayed on the CID. AVImark automatically enters this information for you.

Patient

This field is the current selected patient. AVImark automatically enters this information for you.

Species

This field identifies the species of the current selected patient. AVImark automatically enters this information for you.

Weight

This is the present weight of the selected patient. AVImark will automatically enter this information for you.

Choose

AVImark allows you to select a different client/patient to make a reservation for. When using this option, the CSD will be displayed allowing you to select a client/patient.

- If appropriate, click **Choose** to make a reservation for another client/patient.

Next Patient

This option allows you to select a different patient belonging to the selected client.

- If appropriate, click **Next Patient** to display the Choose Patient window.
- Select the correct patient and click **Done**.

Add

This field will allow you to add a reservation to the Boarding Calendar.

- If appropriate, click **Add** to place a reservation on the calendar.

Choose Facility

The Choose Facility Tab allows you to view and/or choose an appropriate facility Category for the reservation.

- Select the appropriate facility Category.

Choose Day

The Choose Day Tab allows you to view the number of vacancies available for any day for each facility type. In addition, you may choose a specific day to set as the “In Date”.

Show this window automatically

This option will allow you to automatically open the New Reservation window each time you go to the Boarding Calendar from the CID.

- If appropriate, select **Show this window automatically**.

Check-In with a Reservation

When a patient arrives at your hospital you will need to perform the check-in procedure so that AVImark will know when to begin charging the client for the stay. In addition, if the appropriate Whiteboard option has been selected in Hospital setup, Advanced Options you will be taken to the Whiteboard where you may enter notes, treatments performed and items to be dispensed during the stay. For detailed instructions on how to set up and use the Whiteboard feature, refer to Chapter 19, “Whiteboard”.

- With the correct patient selected on the CID, open the **Work with** menu and click **Boarding**.
- Select the correct reservation. **Right-click** to display the shortcut menu. Point to **Check-in/out** and click **Boarding/Hospitalization/Other** as appropriate.

OR

- With the correct patient selected on the CID, select the **Schedule Folder** tab.
- Select the correct reservation. **Right-click** to display the shortcut menu. Point to **Check-in/out** and click **Boarding/Hospitalization/Other** as appropriate.

Check-in an Out-Patient

If you have a patient that has been checked in as an out-patient, AVImark gives you the ability to check the patient into a facility if necessary.

- With the correct patient selected on the CID, open the **Work with** menu and click **Boarding**
- Select an appropriate facility on the correct day. **Right-click** and from the shortcut menu click **New**.
- **Right-click** to display the shortcut menu. Point to **Check-in/out** and click **Boarding/Hospitalization/Other** as appropriate.
- You will need to click **Yes** to confirm converting the patient from an Out-Patient to a boarding patient.

Add Services to a Check-In

Once a patient is checked-in, AVImark allows you to schedule services to be performed during their stay.

- On the Boarding Calendar, select the correct check-in.
- **Right-click** and from the shortcut menu, click **Whiteboard** to display the Whiteboard.
- On the Whiteboard select the **Schedule** tab.
- **Right-click** and from the shortcut menu click **New** or point to **Choose** and click **Treatment/Item/Diagnosis** as appropriate.

Change a Check-In

AVImark gives you several options when it becomes necessary to change check-in/out dates.

- On the Boarding Calendar, move the reservation to a different day using a drag-and-drop operation.

OR

- With the correct patient selected on the CID, select the **Schedule Folder** tab.
- Select the correct reservation. **Right-click** and from the shortcut menu, click **Change**.
- Make the appropriate changes on the Reservation window and click **Apply**.


OR

- On the Boarding Calendar, select the correct reservation.
- Make the appropriate changes on the Reservation window and click **Apply**.

OR

If the patient has already been checked in:

- In the Patient area, **right-click** to see the shortcut menu. Point to **Whiteboard** and click **Whiteboard**.
- With the correct check-in entry selected, **right-click** and from the shortcut menu, click **Change** to display the Change Check-in window.
- Make the appropriate change and click **OK**.

	To learn more about:	Search the Help for:
	Check-in with no Reservation Choosing Calendar duration Census	Check in boarding Boarding calendar views; Calendar duration Checked in tab

Delete a Reservation or Check-In

AVImark allows you to delete any reservation.

- On the Boarding Calendar, select the correct reservation.
- **Right-click** and from the shortcut menu, click **Remove** to display the Remove Appointment window.



- Click the description that represents the reason for removing the reservation and click **Done**.

Check-Out

When the client arrives to check the patient out, you will first need to locate the patient on the Boarding Calendar and then use the check-out key to finish the procedure and charge the client for the right length of stay according to your specifications for that facility.

- With the correct check-in selected on the Boarding Calendar, **right-click** to see the shortcut menu. Point to **Check-in/out** and click **Check-out**.

CHAPTER 19: WHITEBOARD

The purpose of Whiteboard is to have Appointments, Reservations, Check-Ins and/or a schedule of services to be performed, all accessible from one screen. You can use the Whiteboard to view patients who will be arriving, check those patients in, and view those who are currently checked-in. The Whiteboard also allows you to schedule and post activities for those checked-in patients. You can also release and check patients out from Whiteboard. In addition, when a patient is checked into the clinic for an appointment that has services which need to be performed, you can have those added directly to the Whiteboard.

In this chapter you will learn about...

- » Accessing the Whiteboard on page 267
- » Patient Check-In on page 267
- » Add Services to the Schedule Tab on page 268
- » View Patient Activities on page 268
- » Post Services from the Schedule Tab on page 269
- » Release a Patient on page 269
- » Check a Patient Out on page 269
- » Print Reservations, Census and Whiteboard Layout on page 269
- » Print Scheduled Activities on page 270
- » Link a Whiteboard Category to Treatments, Items, and/or Diagnosis on page 270
- » Sort Whiteboard Entries on page 271
- » Expand a Treatment Group on the Whiteboard on page 271
- » Create Additional Data Fields for Whiteboard on page 271
- » Access Additional Data Fields from the Whiteboard on page 272
- » Record Estimate Details on the Whiteboard on page 272

Accessing the Whiteboard

- On the CID, open the **Clients** menu. Click **Whiteboard**.



AVImark allows you to toggle back and forth between the Whiteboard and the CID using ALT+F6. In addition you may work in other areas of AVImark while leaving the Whiteboard open. This will not work in Windows 7 or Vista.



Patient Check-In


From the Arriving tab you can quickly check a patient into a scheduled appointment or reservation. This feature is available on both the Appointment and Boarding tabs.

Appointment tab

- Select the correct patient entry. **Right-click** and from the shortcut menu, click **Check-in**.
- You will be prompted to remove appointment from calendar. Click either **Yes** or **No**.

Boarding tab


- Select the correct patient entry. **Right-click** point to **Check-in** and click **Boarding, Hospitalization** or **Other**.

	To learn more about:	Search the Help for:
	Whiteboard Tabs Whiteboard Activity	Table of Contents – Whiteboard Whiteboard Activities

Add Services to the Schedule Tab

Once the patient has been checked-in you may add activities to the patient during the visit.

- On the Schedule tab, **right-click** and from the shortcut menu click **New** to display the Select Patient window.
- From the Patient Drop-down select the correct patient and click **OK** to display the New Whiteboard Activity window.
- Type the **Code** for the activity. If the code is not known, **TAB** to the **Description** field and type at least the first two characters of the description to display a list of services to choose from.
- If choosing from the list, double-click the correct entry. The Code and Description fields will fill in automatically.
- Enter the other detailed information for this activity.
 - *Repeat* - This field indicates the number of times this activity needs to be performed.
 - *Frequency* - How many times per day the activity is to be performed.
 - *Frequency Intervals* - Specify the interval as how many times per day or an hourly interval.
 - *Quantity* - The amount to be administered each time.
 - *Rate* - The rate of measure in which to administer the service.
 - *Route* - The route through which to take when administering the treatment or item.
 - *Completed* - Mark as completed when the task is accomplished.
 - *User* - The user who will be administering the service.
 - *Start* - The start date for the activity.
 - *Time* - The time for the activity to begin.
 - *Post on Checkout* - Will be posted to the patient's Medical History at check-out.
 - *Category* - To associate a category with the entry.
 - *Amount* - Uncheck **Use Current Price** to clear the amount field and enter a user defined price.
 - *Patient* - Allows you to select the patient if incorrect.

	To learn more about:	Search the Help for:
	Create a Whiteboard Category	Whiteboard

- *Client* - Contains the name of the client owning the patient.
- Click **OK** to add the entry. You may add as many activities as required. When finished adding activities, click **Cancel**.

View Patient Activities

The Whiteboard window gives you two areas in which you may view the scheduled activities for patients during their stay. This may be done from either the Schedule tab or the Checked-in tab. The Schedule tab will allow you to view all patients' activities in one large list, and the Checked-in tab allows you to view individual patients' activities.

- On the Checked-in tab, open the **View** menu. Click **Patient Activities** to display a patient activity area at the bottom of the window.

Post Services from the Schedule Tab

Post activities as they are administered to the patient from the list of activities on the Whiteboard window.

- From either the activities area of the Checked-in tab or from the Schedule tab, select the correct entry(s). When selecting activities to post to a patient's Medical History from the Whiteboard Schedule tab, selecting a single activity multiple times will increase the quantity of the activity that will be posted.



If more than one entry needs to be posted, you can select multiple entries by holding down the CTRL key as you click on each entry. Use the SHIFT key to select sequential entries. In addition, AVImark allows you to re-arrange the order of entries so they will be posted to Medical History in the order you wish. Use a drag-and-drop operation to change the position of the entries in the list prior to posting them.

- With the correct entries selected **right-click** and from the shortcut menu, click **Post**.

Release a Patient

If you are using the Control Patient Check out feature you will have to release the patient before AVImark will allow them to be completely checked out.

- From the Checked-in tab, select the correct patient entry.
- **Right-click** and from the shortcut menu, click **Release**.

Check a Patient Out

Once a patient has been released for check out, you are able to check the patient out from Whiteboard.

- On the Checked-in tab select the correct patient for check out.
- **Right-click** and from the shortcut menu click **Status** to display the Check-in Status window.
- Click **Check out**.

Print Reservations, Census and Whiteboard Layout

AVImark gives you the ability to print the list of reservations and the Census, list of patients currently checked-in. Also from any tab you can print the layout of that selected Whiteboard tab.

Appointment Reservations

From the Whiteboard Arriving tab select the Appointments sub-tab.

- On the **File** menu, click **Print Census** to display the Printing Appointments window.
- Use the **Print to** drop-down list and select the correct printer.
- For a specific date range, select the Check-in Date Range **option and use the From and To drop-down calendars to** enter the date ranges.
- If appropriate, use the Chart or Document option to print patient charts or documents for those patients checked-in.
- Click **Print** or to preview the report onscreen select the **Preview** option and then Print.

Reservations

- From the Whiteboard Arriving tab select the **Boarding** sub-tab.
- On the **File** menu, click **Print Census** to display the Print Boarding Reservations window.
- Use the **Print to** drop-down list and select the correct printer.
- For a specific date range, select the **Check-in Date Range** option and use the **From** and **To** drop-down

calendars to enter the date ranges.

- If appropriate, use the **Facility** drop-down list and select a specific facility.
- If appropriate, select a **Sort By** option.
- Click Print or to preview the report onscreen click **Preview**.

Census (Check-ins)

- From the Whiteboard select the **Checked-in** tab.
- On the **File** menu, click **Print Census** to display the Print Hospital Census.
- Use the **Print to** drop-down list and select the correct printer.
- For a specific date range, select the **Check-in Date Range** option and use the **From** and **To** drop-down calendars to enter the date ranges.
- To include the **Scheduled Activities** on the report, select **Include Activities**
- If appropriate, use the **Facility** drop-down list and select a specific facility.
- If appropriate, select a **Sort By** option.
- Click Print or to preview the report onscreen click **Preview**.

Print Tab Layout

If you have customized the layout of a tab in the Whiteboard by arranging, removing or adding columns AVImark gives you the ability to print this layout as it is displayed on screen.

- In Whiteboard select the desired tab.
- **Right-click** and from the shortcut menu select **View, Print**.
- Choose a printer and click **Print** to print the layout of that selected tab.

Print Scheduled Activities

AVImark gives you the ability to print the list of activities for those patients who are checked-in.

- From the Whiteboard select the **Schedule** tab.
- On the **File** menu, click **Print Schedule** to display the Print Whiteboard Schedule window.
- Use the **Print to** drop-down list and select the correct printer.
- To print activities for one specific doctor or staff member use the **Doctor** drop-down list to choose the appropriate person.
- Use the **Whiteboard Category** drop-down list to print activities associated with a specific category.
- To print activities for a specified time period select **Date Range** and enter the desired dates.
- If appropriate choose to include **More Stuff information, Notes** and **Completed Activities**.
- If appropriate, select a **Categorize by** option.
- Click **Print** or to preview the report onscreen click **Preview**.

Link a Whiteboard Category to Treatments, Items, and/or Diagnosis

AVImark allows you to link Treatment, Inventory and/or Diagnosis Categories or individual Treatments, Items, and/or Diagnosis to a Whiteboard Category. These Whiteboard Categories will need to be set up in System Tables, Whiteboard Categories. This feature is particularly useful when you want to group specific services together on the Whiteboard.

- On the CID, open the **Work with** menu. Click **Treatments, Inventory, or Diagnosis List**.

Link a Treatment, Inventory, or Diagnosis category

- From the Categories section of the appropriate list, select the correct Category.
- **Right-click** and from the shortcut menu, click **Change** to display the Change window for that list.
- Using the Whiteboard drop-down list, choose the appropriate category name and click **Done**.

Link an individual Treatment, Item, or Diagnosis

- Click the **Category** name which contains the service to be linked.
- Select the correct item. **Right-click** and from the shortcut menu, click **Change** to display the Change window.
- Click the **Whiteboard** tab. Using the Whiteboard drop-down list, choose the appropriate category name and then click **Done**.

Sort Whiteboard Entries

Sort the Arriving, Checked-in, or Schedule Tab by using the “Group by Panel”. This will allow you to sort by a column heading.

- Select the Whiteboard tab you wish to sort.
- On the **View** menu, click **Show/Hide Group Panel** to display a gray area above the Whiteboard entries.
- Select the Column Heading you wish to sort by. Drag the heading to the gray area. This will display the entries in a “tree style” grid.
- On the **View** menu, click **Expand All/Collapse All** to expand or collapse all entries at once.

Expand a Treatment Group on the Whiteboard

When choosing a treatment group to add to the activity schedule on the Whiteboard, you have the option of expanding or not expanding the group.

- In an activity area on the Whiteboard, **right-click** to see the shortcut menu. Point to **Choose** and click **Treatment** to display the Treatment List window.
- Select the desired Treatment Group. Click **Done** to display the Treatment Group on the New Whiteboard Activity window.
- Click **OK**. You will need to click **Yes** or **No** to confirm.

Create Additional Data Fields for Whiteboard

Additional Data Fields may be created for the “Checked-in tab” or the “Schedule” tab.

- On the CID, open the **Work with** menu. Click **System Tables**.
- Select the **Additional Data Fields** Table.
- In the Entries for Additional Data Fields section, select the area you wish to create fields for.

Additional Check-in Fields

Selecting this field, you may create Additional Data Fields for the Checked-in tab.

Additional Whiteboard Fields

Selecting this field, you may create Additional Data Fields for the Schedule tab.

- **Right-click** and from the shortcut menu, click **More Stuff Fields** to display the Define More Stuff window.
- **Right-click** and from the shortcut menu, click **New** to display the Additional Data Field window.

Whiteboard

- In the **Name** field, type the description of the field you want to create.
- Using the **Type** drop-down list, select the field type that would be best for data that will be entered into the field you are creating.
- Click **Done** to add the field. Continue adding the desired Additional Data fields in the same manner, and click **OK** when you are finished.
- Click **Done** on the System Tables window.

Access Additional Data Fields from the Whiteboard**Checked-in tab**

- On the **Checked-in** tab, select the correct patient. **Right-click** and from the shortcut menu, click **Change** to display the Change Check-in window.
- Enter the data to record for the patient and then click **OK**.

Schedule tab

- On the **Schedule** tab, select the correct entry. **Right-click** and from the shortcut menu, click **Change** to display the Change Whiteboard Activity window.
- Enter the data to record for the patient and click **OK**.

Record Estimate Details on the Whiteboard

AVImark allows you to post, “Patient Specific Estimates”, “Canned Estimates” or an “Individual Estimate” entry to Whiteboard. This can be done automatically or manually.

Automatically

- On the CID, click the patient’s **Estimate** tab.
- Choose or create an Estimate.
- When selecting the Estimate, you will need to click **Yes** to confirm.

Manually

- On the CID, click the patient’s **Estimate** tab.
- Select the desired Estimate. **Right-click** and from the shortcut menu, click **Post to Whiteboard**.
- You will need to click **Yes** to confirm.

**To learn more about:**

Include More Stuff on Schedule
Whiteboard Categories Setup

Search the Help for:

Print Whiteboard Entries
Whiteboard Categories Table

CHAPTER 20: PERIOD-TO-DATE REPORTS

At the end of each business day you will want to have AVImark prepare reports that summarize the day's activity and income, as well as print your deposit slip. Furthermore, at the end of the month you will probably want summary reports of the month's activity. AVImark provides a flexible method whereby you can have various reports prepared that list income, treatment, rabies vaccinations, controlled substances, and other data for any period of time.

In this chapter you will learn about...

- » Run the Reports on page 273
- » Choose a Report on page 275
- » See the Bottom Line on page 275
- » Account Summary on page 276
- » Audit Trail on page 276
- » Controlled Substance on page 276
- » Deposit Slip on page 276
- » Health Plan Report on page 276
- » Held Check Report on page 276
- » Income by Provider Report on page 276
- » Income by Treatment Summary Report on page 276
- » Inventory Used Report (Illinois) on page 277
- » Open Invoice Report on page 277
- » Patients by Treatment Report on page 277
- » Payment Summary Report on page 277
- » Period Totals on page 277
- » Rabies Report on page 277
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- » Sales Summary on page 278
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- » Treatment Control Log on page 278
- » Unposted Transactions on page 279
- » K.A.S.P.E.R. (Kentucky All Schedule Prescription Electronic Reporting) on page 279
- » A.S.A.P. (American Society for Automation in Pharmacy) on page 279

End of Period Reports

Print by

Period Day Doctor (all) Sort by Name

Start 02/23/10 Print To HP Photosmart D7300 seri Report code

End 02/23/10 Preview Company Client code

Site 0

PRINT THESE.. Save

DON'T PRINT THESE...

Account Summary
Audit Trail
Controlled Substance
Deposit Slip
Health Plan Report
Held check Report
Income by Provider
Income by Treatment
Inventory Used
Open Invoices
Patients by Treatment
Payment Summary
Period Totals
Rabies Report
Referral Report
Sales Summary
Tax By Area
Transaction Journal
Transaction Summary
Treatment Control Log
Unposted Transactions

Bottom line Income options

CHARGES

Treatments
Inventory
Adjustments
Sales tax
Late fees

PAYMENTS

Cash
Checks
Held checks
Mastercard
Visa
Discover
Am Express
Debit
All others

Print Close ? Help Bottom line

Run the Reports

Select the report period

With the exception of the **Payment Summary Report**, **Open Invoice Report**, and the **Unposted Transaction Report**, all reports can be printed for any time period you choose.

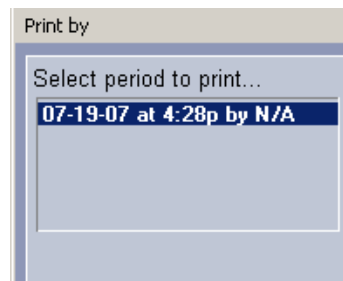
Period-to-Date Reports

- On the CID, open the **Work with** menu. Click **Reports** to display the End of Period Reports window.
- Use the **Period** drop-down list to select the time period you wish the report to cover. By selecting a period, AVImark automatically specifies the dates for that period with today's date as the ending date.

Print by menu

AVImark also allows you to print reports for a period beginning with the previous date and time of the day. This is kept by AVImark as the closing date and time, allowing you to print activity reports back to the time the reports were last closed.

- Open the **Print by** menu and click **By closing** to display the Select period to print window.



- If business has been conducted since the last closed report, the top entry will be **open period**.
- Select the reports which you wish to print and click **Print**.
- You will need to click **Yes** to confirm.

Start/End

If appropriate, you may choose the Start/End dates for the period.

- Using the **Start/End** drop-down calendar, select the date for the period you wish to print for.

Doctor

Allows you to organize the reports you are printing. You may choose for a selected doctor, for all doctors as separate reports, or for a consolidated report which includes all doctors.

- Use the **Doctor** drop-down menu and select how you wish to organize the reports.
- In the **Doctor** field, right-click to see the shortcut menu. Select the **Include** and **Sort by** options that you wish. Options include:
 - Include Users
This allows you to add all users in Users and Security to the drop-down menu.
 - Include Inactive
This allows you to add all users in Users and Security who have the Inactive Box checked.
 - Sorting Options
This allows you to sort the drop-down menu by selecting; By Name, By Sequence, or By Appointment Sequence.

Print to

- Use the **Print to** drop-down list to select the printer to use for the reports. By specifying the **Excel** option, you can print or save this report to the desired location.

Preview

As with any other print area of AVImark, you may preview, email or save reports.

- Select **Preview** and click **Print** to preview the report on screen.

Sort by

You may choose how to sort the report(s) you are printing. You may sort by Account number, Amount, Date, ID number, Name, Rabies Tag number, County, Species, and City.

- Use the **Sort by** drop-down menu to select how you wish to sort the report(s).

Report Code

You may print an activity log for patients receiving treatments and/or inventory items for which one or more, (up to three), Report Codes have been assigned.

- If appropriate, type the **Report Code(s)** you wish to print for.

Company

When adding clients to AVImark, each client is automatically assigned a Company number (typically 01). You may wish to divide your clients into groups for reporting and billing purposes, you may assign any client company number according to the group they belong to.

- If appropriate, enter the **Company** number you wish to print for.
- To print reports by company number as specified in Medical History, activate the **Detailed reporting by company** in Hospital Setup, Advanced Options.

Site

When charges are entered into Medical History, you may enter a Site number. In addition, over-the-counter sales entered into accounting may also have a Site number specified. AVImark lets you print most reports by Site number.

- If appropriate, use the **Site** drop-down menu and select the **Site number** you wish to print for.

Choose a Report

- Select the name of the report you wish to print from the **Don't Print These** field.
- Use the Single Left Arrow (<) button to move the report over to the **Print These** field.
- Repeat this procedure to select other reports.
- Using the same technique, you may move any report back to the **Don't Print These** field by using the Single Right Arrow (>).
- Move **all** reports within either field by using either the Double Left (<<) or Double Right Arrows (>>) appropriately.

See the Bottom Line

In addition to running and printing reports, AVImark allows you to see instant production totals for any period. (Returned checks will be subtracted from the bottom line because the bottom line shows the current amount of money).

- Select the period of time you wish to view statistics for using the **Period** drop-down menu.
- Ensure the period of time shown in the **Start** and **End** fields reflects the period of time you wish to report.
- Click the **Bottom Line** button.


Account Summary

This report summarizes the accounting of each client that made a payment or incurred a charge during the period. It shows such information as beginning balance, charges, payments, and ending balance.

Audit Trail

This report tells you which employees performed certain functions, at what time and at which workstation the task was performed. These functions/tasks include removing accounting transactions, removing clients, etc. as shown in the Audit Table as part of the System Tables window. This report is designed to tell you which employees are doing certain tasks that you would like to monitor.

Controlled Substance

	To learn more about:	Search the Help for:
	Save/E-mail Reports	
	Reports that can be printed by Client Code	
	Sort and Filter Reports	Running Reports
	Export Reports to Excel®	
	Reconcile Reports	

This report lists activity for controlled substances. In order for a treatment or item to appear on this report, it must meet one of the following criteria listed below:

- The treatment/item must have a **C** Action Code at the time it was entered into Medical History and be posted to accounting.
- Items linked to treatments must have a **C** Action Code when entered into Medical History and be posted to accounting.
- Received items on Purchase Orders must have a **C** Action Code.

Deposit Slip

Included on the deposit slip is the date of each transaction, the type, check number, client name, and the amount of each entry.

Health Plan Report

This report will display a list of all patients currently on a Health Plan. Each Plan will be displayed with a heading on the report, with a list of all patients on this plan. Along with patient information, other pertinent information will be reported as well, such as the expiration date of the plan and which services have yet to be performed.

Held Check Report

The Held Check Report will display a list of all checks being held during the current time frame. This report is also printed automatically after the Deposit Slip Report.

Income by Provider Report

The Income by Provider Report will display an income analysis for all providers in your clinic. Income is defined by payments received. It may be broken down by doctor and is based on charges, such as treatments, items and diagnosis, showing the percent of your income. AVImark will know which doctor the income is specified for by looking at the charges for which the income was applied and which doctor implemented the charges. When this report is selected for printing, you will notice a tab on the right side of the screen will appear named **Income options**. These options are only relevant to this report, and give you the opportunity to print this report including Client detail, Transaction detail, and/or Include Inventory Sales. With none of these options checked, AVImark will print a report with Totals Only.

Income by Treatment Summary Report

This report shows your income for treatment, inventory and diagnosis, showing the percent of your income. This report may be printed for each doctor or a consolidated report which reports the activity of all doctors com-

bined. Treatments, Items and Diagnosis given to patients that have income, are listed alphabetically under each category. For each treatment, item or diagnosis, income values are given with percentages of the total income along with quantities and percentages of the total quantity. Totals are given at the bottom of each column. It also summarizes your income by treatment type, showing the percent of your income that was derived from each treatment category. You also have the option to use the Average Cost or current Cost when calculating the Expense of Inventory items.

Inventory Used Report (Illinois)

The state of Illinois requires clinics to charge tax for items that are sold to clients as part of a service. For those clinics that do not choose to stop selling retail items they must start tracking all items that are administered to a patient as part of a service that is performed. The report lists patients who received items sold as inventory used verses being sold directly. The Total, Cost and Price amounts on the report will look directly at the inventory item at the time the report is processed. The exact cost and price amounts specified in the Inventory List at the time the item is dispensed is what AVImark will use to process the report figures.

Open Invoice Report

This report will display a list of all open invoices along with their totals and dates of service. This report is usually printed before statements so you can see which clients still have invoices open.

Patients by Treatment Report

This is a consolidated report for all doctors with treatments, items and diagnosis listed alphabetically for each category. For each treatment, item or diagnosis, the client(s) for whom the service was performed, are listed beneath. Several columns of information are available displaying the client number, the client name, residence phone, patient name, doctor performing the procedure, quantity, date, time, price, species, breed, age and sex values. This report provides a list of all patients that have received each treatment, item and diagnosis during that period. It is intended to serve as a reference source to determine quickly which patients were given which treatments, items or diagnosis.

Payment Summary Report

This report prints month-to-date totals for each payment type in the current month. Typically, this is a monthly report used to view payments in a summarized format Combined totals for Cash, Check, Master Card and Visa will print at the end of this report.

Period Totals

This Period Totals Report shows payments, production by provider, taxing amounts, late charge totals, account adjustments, etc.

Rabies Report

This report will include only those patients for which rabies vaccinations (treatments for which an Action Code of **R** have been assigned) were performed during the report period.

Rabies Report for Cary, North Carolina

A program was written for clinics in Wake County, North Carolina who need to send certain rabies information to the county. The utility program **CaryRabies** creates an xls file for clinics to send the county either by email or on CD. For more information about the CaryRabies program, please call Technical Support.

Rabies Reports for Kane County, Illinois

A utility program was written for clinics in Kane County, Illinois who need to send certain rabies information to the county. The utility program **KaneCountyRabiesReport** creates a txt file for clinics to send the county either by email or on CD. For more information about this please call Technical Support.

RabiesCSV Utility

AVImark has designed a utility program that will include required information for the following areas: El Paso, TX; Hamblen County, TN; Albuquerque, NM; and Charlotte County, FL. To access this utility from the CID

select the menu option **Utilities, Utilities**. Type the name of the utility program, **Rabiescsv**. To print the appropriate report for your area select your location. The appropriate county must be assigned to the client for the information to be reported for Hamblen, TN or Charlotte, FL. Clients must have the appropriate city and state associated with their information and the rabies treatment must have the R action code in order for the proper information to print.

RabiesCSV REquirments for El Paso, TX

For clinics in El Paso, TX you are required to display on the Rabies report the Vaccine MFG and Serial number along with a column on the report showing the annual registration certificate due date and patient name due to renew the certificate. To report the renewal certificate date you must create a treatment with the exact description of **EP Registration Certificate**. This code must also have an annual reminder setup so the due date is reported and printed in the correct column on the report. The city of El Paso must be assigned to the client for the correct information to be reported.

Referral Report

This report is sorted by referral source. For each referral source, the invoice date is given along with the referred client's name and phone number, patient's name, charges, and payments made. The report only includes new clients who were added to the computer, did business with you during the report period and were referred to your hospital by an existing client. Referral thank-you letters may be automatically printed after the report, addressed to each of the referral sources.

Sales Summary

This report identifies production generated by the Admitting Doctor that is specified in the Enter Medical History Window. On the surface, this report is identical to the Transaction Summary report, however, this report is designed to be printed by the admitting doctor. The Sales Summary Report will show income for each treatment, item and diagnosis. The usage column shows quantity used and the expense column shows the associated inventory expense. You also have the option to use the Average Cost or current Cost when calculating the Expense of Inventory items.

Tax by Area

The Tax by Area report is used to assist clinics located in Ohio, Georgia, and Washington for compliance with state tax laws. This report is used in conjunction with the Zip field in the Enter Medical History window. This report displays the date of the transaction, the client's name and account number, along with the total amount of non-taxable services for that client and date, amount of taxable services, tax paid, and total of the invoice. This information will be printed for each area that was used in the Zip field of the Enter Medical History window.

Transaction Journal

This report shows a very detailed list of all treatments, items or diagnosis performed during the time period. Because it is so detailed, you probably would NOT want to print one for any period other than a day at a time. The report is printed chronologically from top to bottom, listing every client and patient you treated, showing the treatments performed on each patient. Also shown are date of the transaction, type of transaction, descriptions, quantities, the expense of any inventory items included on the report, and the amount of each transaction.

Transaction Summary Report

This report shows totals of the categories of transactions for treatments, items and diagnosis. It is used as a guide for determining what percentage of income comes from each category - a *profit center* report. You also have the option to use the Average Cost or current Cost when calculating the Expense of Inventory items.

Treatment Control Log

This report allows you to produce a list of all patients that have received specific types of treatments or items, categorized by what is called a Report code. Up to 3 Report codes may be entered into the Report code field for any of your treatments listed in the **Treatments or Inventory List**. The report will list all selected patients in order of patient name. Patients having received a particular coded treatment or item will be listed under that heading. All treatments or items will be listed in alphabetic order by treatment code. If treatments or items from multiple categories are listed, the treatment or item category name will appear as a report section title.

These treatment or item categories will also appear in alphabetic order.

Unposted Transactions

This report will show the total amount of services, items or diagnosis which have not yet been posted to any client's account.

K.A.S.P.E.R. (Kentucky All Schedule Prescription Electronic Reporting)

This is a controlled substance log (primarily for Kentucky hospitals) that will include the hospital DEA identification with the provider's identification for all designated items. The report will include the hospital's DEA number, the client's social security number or drivers license number, the patient's birthday, the date of transaction, the controlled substance's item code, the quantity of the item dispensed, the item's NDC identification, the performing doctor's DEA identification, the client's name, the patient's name, and the client's address.

Setup

- Specify all doctors DEA identification in Users and Security.
- Specify the hospital's DEA identification in the Demographics tab of Hospital Setup.
- Specify each controlled substance in the Inventory list with its own NDC code along with a **C** Action code.

Send the data


- On the CID, open the **Applications** menu and click **KASPER** to start the KASPER program.
- Using the **From date** field, specify the start date.
- Enter the number of days you wish the report to include.
- If using the **Export to** option, you will need to specify the drive you wish the data to be copied to.
- Insert a blank media disk in the correct drive and click **Run**.

A.S.A.P. (American Society for Automation in Pharmacy)

This is a controlled substance log that will include the hospital DEA identification with the provider's identification for all designated items. The ASAP Report is applicable for specific states. Call Technical Support to see if your state is included within this report and state specific instructions.

Basic Setup:

- Specify all doctors DEA identification in Users and Security.
- Specify the hospital's DEA identification in the Demographics tab of Hospital Setup.
- Specify each controlled substance in the Inventory list with its own NDC code along with a **C** Action code.
- Create a unique RX number of each controlled drug. In order to get the unique number, use the Sequence numbers on drug labels in Hospital Setup, Document tab.
- To include the RX number on the ASAP report set the Hospital Advanced option, **Include Sequence**

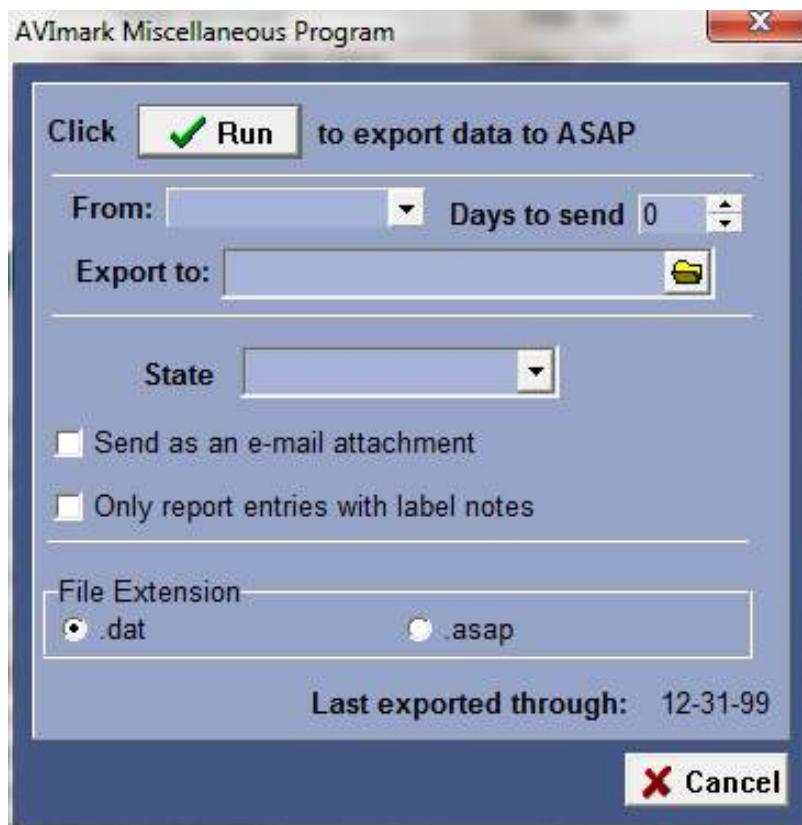
	To learn more about:	Search the Help for:
	Bottom Line	Bottom Line
	Typical Daily Reports	
	Typical End of Week Reports	End of Period Reports
	Typical Monthly Reports	
Quarterly, Yearly, Fiscal or Start/End Reports		

Number set to True.

Basic Data Sending:

- From the CID Utilities menu select **Utilities** and type **ASAP**.
- Using the **From date** field, specify the start date.
- Enter the number of days you wish the report to include.
- If using the **Export to** option, you will need to specify the drive you wish the data to be copied to. Insert your selected media in the correct drive.
- Select your location or state (i.e. MS, TN)
- Click **Run**.

The file will be in a .DAT format and will be named with your Hospital DEA number_date`.



CHAPTER 21: SECURITY ADMINISTRATION

AVImark contains a security feature that allows the hospital administrator to control the use of the different capabilities of the system in a very flexible way. The security feature is designed in such a way as to not affect the use of AVImark, except when a user attempts to do something that they are not authorized to do. This fact makes the security feature transparent to the user. The only extra action required by the user is that they *log on* when they first start AVImark. If you choose not to make use of the new security feature, all you will need to do is enter your list of doctors and other staff, and the security feature will be completely invisible to you. Likewise, you can choose to protect just a few functions in AVImark and those functions that you have not protected will be automatically available to everyone.

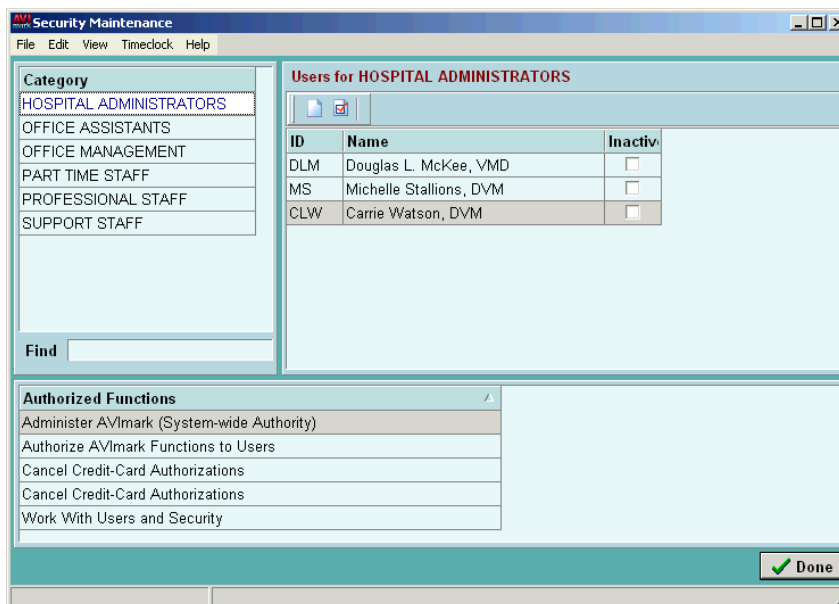
In this chapter you will learn about...

- » Add Categories and Employees on page 282
- » Completing the Setup on page 285
- » Change User Information on page 285
- » Change Passwords on page 285
- » Specify Doctor Sequence and Location on page 285
- » Authorize User Functions on page 286
- » Specify Security for other User Groups on page 288
- » Print the Users and Security Report on page 288
- » On-going Security Administration on page 288
- » Log On to AVImark on page 288
- » AVImark Compliance with FACTA Red Flags Rule on page 288
- » AVImark Account Locking Feature on page 289

Identify and Add AVImark Users

Whether or not you choose to use the AVImark security feature to control the activities of your staff, they will still need to be identified. Information should be recorded for each provider such as ID, names, license numbers (printed on the rabies certificate), and a staff sequence number which will determine the order doctors appear in the Doctors drop-down menu and on the Appointment Calendar.

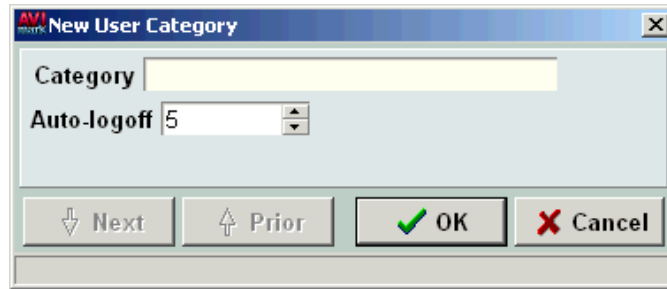
- On the CID, open the **Work with** menu. Click **Users and Security** to display the Security Maintenance window.



Add Categories and Employees

Once the appropriate staff members have been added to the Hospital Administrators Category, you may add other categories, and then other employees as required.

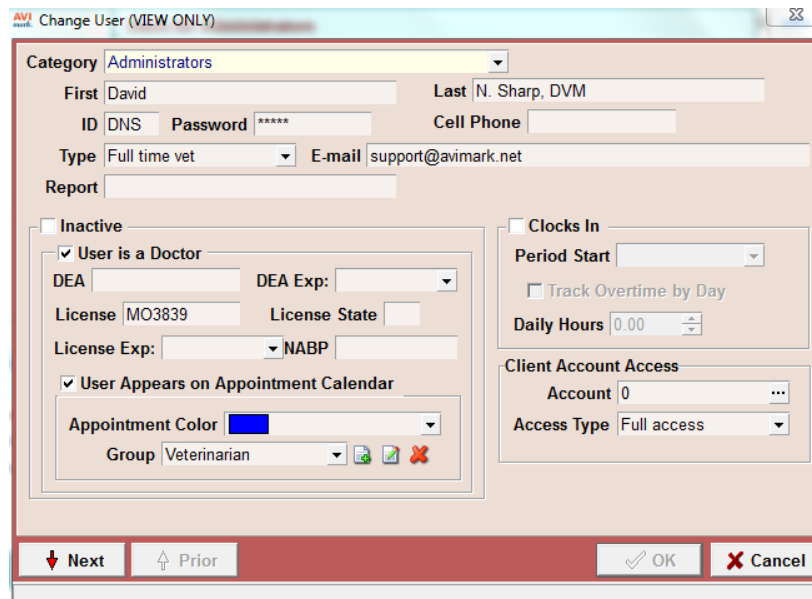
Add a new category



- Point in the **Category** section of the Security Maintenance window.
- **Right-click** and from the shortcut menu click **New** to display the New User Category window.
- In the **Category** field, type the name for this category.
- Use the TAB key to move to the **Auto-logout** field. Click the **Up** and/or **Down** arrow to specify the number of minutes to wait (if the user does not touch the keyboard or mouse) before automatically logging the user out of AVImark.
- Click **OK**.

Add new employees

- Click the **Category** you wish to add the new user to.
- Point in the **User for** section. **Right-click** and from the shortcut menu click **New** to display the New User window.
- Enter the appropriate information for the employee and click **OK**.



Category

This menu allows you to change the category in which to include this user. AVImark automatically enters the

Category name depending on the Category you have selected when adding new staff.

- If appropriate, click the **Category** drop-down and select a category.

First

- Type the users first name.

Last

- Type the users last name, including ending titles such as DVM, VMD, etc.

ID

- Type the user's initials or other ID; up to three characters.

Password

When entering a password, choose 3 to 5 characters using any combination of letters and numbers. Do not use spaces and/or punctuation marks. You will notice that when you open this window asterisks automatically appear. Whether or not the user has been assigned a password these asterisks will appear for security reasons. If you do not intend to use the AVImark security feature at this time, leave this field blank.

- Type an appropriate password.

Cell Phone

- If appropriate type the user's cell phone number.

Type

This field is used by VetCor® veterinary hospitals to indicate the type user.

- Click the **Type** drop-down and select the **Type** user.

E-mail

This option allows reply e-mails that are received back from customers to be sent directly to a specified user.

- Enter the employees current e-mail address.
- A drop-down selection list of email addresses can be accessed when sending e-mail from the CID Client Area, **Right-click**, Send Email and from Information Search. AVImark will not display the address of persons that have been inactivated in Users and Security.

Report

This feature allows the user to enter a different name, other than the one entered in Users and Security. This Report name will be shown when printing an Invoice.

- If appropriate, type a **Report** name.

Inactive

AVImark allows you to mark an employee as inactive, causing them to be removed from the Doctor drop-down list, and from the Appointment Calendar. This may be especially useful in the event you wish to keep a user's Time Card history for future reference.

- If appropriate, check the **Inactive** box.

User is a Doctor

When adding a new doctor to Users and Security, you will want to select this option. In doing so, the Sequence, DEA, License, and User Appears on Appointment Calendar fields are activated, allowing you to select and enter information.

- If appropriate, check the **User is a Doctor** box.

DEA (K.A.S.P.E.R. and A.S.A.P. integration)

AVImark provides controlled substances reports to meet the requirements for specific states. The doctor's DEA number will need to be entered for the use of these reports.

- If appropriate, type the doctor's **DEA** number.

License

This field allows you to enter the doctor's rabies license number.

- If appropriate, type the doctor's **License** number.

License Expiration

This field allows you to enter in the Doctor's license expiration date.

NABP Number

Some states require this number to be included in their controlled substance reports. This field will only allow up to 10 characters.

User Appears on Appointment Calendar

This feature allows you to have a user appear on the Appointment Calendar.

- If appropriate, check the **User Appears on Appointment Calendar** box.


Appointment Color

AVImark allows you to assign a color for each doctor's appointments on the calendar. You may select from a list of basic colors, or you may choose to create and add a custom color.

- Click the **Appointment Color** drop-down and then select the desired color or click **Custom Color** to display the Color window.
- Select the desired color from the Custom colors section and click **OK**.

Group

Each user that is displayed on the Appointment Calendar can be assigned a unique Appointment Group. Once users are assigned an Appointment Group, these users can be displayed according to the group in which they are

included. Appointment Groups can be defined from this window by clicking the New button  and entering a new code and description or from the new Appointment Groups table within System Tables.

- If applicable, use the **Group** drop-down list and select the correct Group.

Clocks In

This function allows you to track hours and activity with the AVImark Time Clock feature. For those staff members using the Time Clock check this option. This option must also be checked for those administrators who wish to view or change entries in an employee's Time Card.

- If appropriate, check the **Clocks In** box.

Period Start

AVImark allows you to select the beginning date the user's Time Card will default to.

- Click the **Period Start** drop-down calendar.
- Select the date you wish the Time Card to default to.

Track Overtime by Day


AVImark allows you to track an employee's overtime by day.

- If appropriate, check the **Track Overtime by Day** box.

- Using the **Daily Hours** field, enter the number of hours the user works before overtime is tracked.

Client Account Access

You may prevent an employee from having access to add, change, or remove certain information. By adding the AVImark client account number of the employee to the Account field, you may select the access type you would like to grant that employee. *View only* will allow the user to open their account with a Read only access. *Add patient* allows the employee to add, change, or remove patient information. *Add history* gives access to adding, changing, or removing Medical History as well as patient information. *Full Access* will give the employee full access to their account. Selecting either **Add Patients**, or **Add History**, will prevent the employee from adding, changing, and removing Accounting entries.

- If appropriate, click the **Browse** button  to display the Client Selection window.
- Type the employee's name in the **Client** field and click **Continue**.
- Click the **Access Type** drop-down and select the access type you wish to grant.

Completing the Setup

- Click **OK** to add and save the new user information. After selecting OK, you will notice a User Sites window will appear. This will allow you to select the site where this user typically works. This is applicable for clinics with multiple sites.
- In this window choose **right-click New**.
- From the **Site** drop-down list select the appropriate Site and click **OK**.
- Click **Done** once the appropriate information has been entered.
- Another New User window will open allowing you to enter another staff member. You can do that at this time or click **Cancel** to close the New User window.

Change User Information

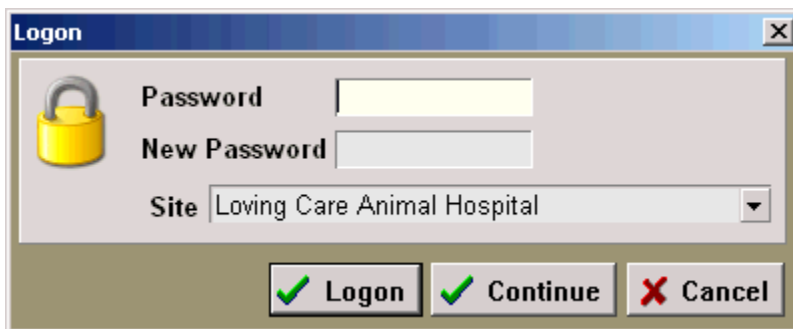
AVImark allows you to change information for any user within Users and Security.

- From the **User for** section, double-click on the correct name to display the Change User window.
- Change any necessary information. Use the TAB key or simply click to move from one field to another.
- Click **Done** to record any changes.

Change Passwords

Passwords may be changed from the AVImark Logon window at anytime. AVImark does not force a user to change their password. However, it is recommended to do so periodically.

- On the CID, press **F12** to display the AVImark Logon window.



- Enter the current Password. Use the TAB key to move to the **New password** field.
- Enter the New password and click **Logon**.

Specify Doctor Sequence and Location

Specifying Site Location for User

When AVImark data is being shared by multiple hospitals you can specify the site or location this user normally works.

- From the Security Maintenance window highlight the user and from the **right-click** menu select **Locations**.
- Click the **Site** drop-down and select the appropriate **site**.
- Click **Ok** once the appropriate information has been entered.

If the user works at multiple locations follow the above steps to add another location for the user.

Doctor Sequence

Once you have selected the option, User is a Doctor, AVImark will automatically enter the sequence number of how the doctor will appear in the Doctor drop-down list throughout AVImark. The sequence is set by the order in which the doctor was entered into Users and Security. Once the new doctor information has been added and saved, you may change this sequence number if you wish.

- From the Security Maintenance window highlight the appropriate doctor.
- From the **right-click** menu select **Sequence, Doctors**.
- Highlight the doctors name and use the green up and down arrows to move the user in the desired sequence. You can also drag-and-drop the user in the desired sequence.

Appointment Sequence

Selecting the option, User Appears on Appointment Calendar automatically assigns an Appointment Sequence number. As with the Sequence number, the Appointment Sequence is set by the order in which the user has been entered into Users and Security. You may change the Appointment Sequence once the new user information has been entered and saved.

- From the Security Maintenance window highlight the appropriate doctor.
- From the **right-click** menu select **Sequence, Appointments**.
- Highlight the doctors name and use the green up and down arrows to move the user in the desired sequence. You can also drag-and-drop the user in the desired sequence.

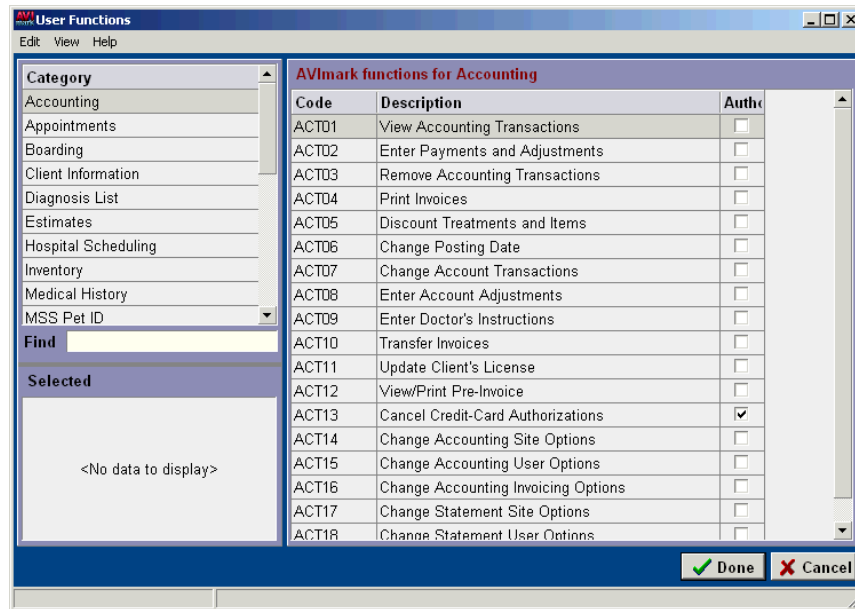
Authorize User Functions

Included with AVImark is a list of functions that can be protected. The use of these functions can be controlled through the use of the security feature. As you select the different Categories, you will notice the different functions associated with that category. You will want to identify what AVImark functions are to be protected, and which users are authorized to use these functions.

Hospital Administrators

Authorize the hospital administrator to perform only those functions which you want to prevent other categories of users from performing. By authorizing the function, *Administer AVImark (System-wide Authority)* to the hospital administrator, this will grant full authority to all functions in AVImark in one step.

- On the **Security Maintenance** window, click **Hospital Administrator**.
- Point in the **Authorized Functions** section. **Right-click** and from the shortcut menu click **Choose** to display the User Functions window.



- From the **Category** section, click **System Administration**.
- From the **AVImark functions for System Administration** section, point to **ADM01, Administer AVImark (System-wide Authority)**.
- **Right-click** and from the shortcut menu, click **Select** to copy the function into the **Selected** area.
- Continue selecting the other functions you wish to prevent other user groups from performing.
- After the appropriate functions have been copied to the **Selected** area, click **Done**.

Remove authority

Once functions have been authorized to a user group and you find it necessary to remove one or more of these functions, you may choose to do so a couple different ways.

- On the **Security Maintenance** window, click the **Category** name you wish to remove a function from.
- From the **Authorized Functions** section, point to the function you wish to remove. **Right-click** and from the shortcut menu, click **Remove**.
- You will need to click **Yes** to confirm.

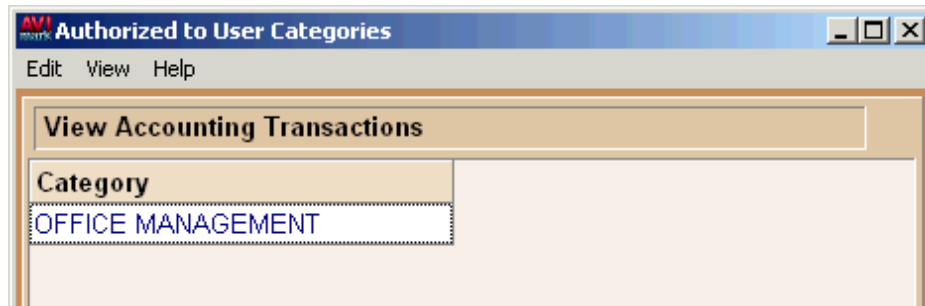
OR

- From the **User Functions** window, click the **Category** name for which functions had been authorized.



In the AVImark functions for section, functions which have been authorized to a user group will be indicated by a check mark in the Authorized column.

- In the **AVImark function for** section, point to the authorized function that you wish to remove.
- **Right-click** and from the shortcut menu, click **Authorized Categories** to display the Authorized to User Categories window.
- Point to the appropriate **User Category** name. **Right-click** and from the shortcut menu, click **Remove**.
- You will need to click **Yes** to confirm.
- Click **Done** when finished removing the function from the appropriate user groups.



To learn more about:

Specifying User Functions
Inactive Staff Members

Search the Help for:

Choosing functions
Adding & Changing Staff

Specify Security for other User Groups

Use the discussion above to establish authority for other groups of users, if appropriate. Understand that with the functions you secured to the Hospital Administrator group, those functions are automatically off limits to other user groups, unless you authorize them as well. For those functions you have secured, you will need to decide if there are other groups of users which you want to authorize any of these same functions. Do not make the mistake of thinking you have to authorize everyone to all the functions they can perform. For any given function, if you don't secure it as Hospital Administrator, everyone will be able to use it. When a user does not have the authority to perform certain functions or make desired changes, the window will be displayed as VIEW ONLY, and the fields within this window will be locked, preventing any change from being made. If the user attempts to click Done on a window that displays the VIEW ONLY message, they will be prompted with an unauthorized message.

Print the Users and Security Report

AVImark gives you the ability to print, e-mail, save and/or export a report containing a list of users, user groups, and secured functions for specific user groups.

Print the report

- On the **Security Maintenance** window, open the **File** menu. Click **Print** to display the Print Users window.
- Click the **Category** drop-down and select a **Category** or select **(All Categories)**.
- Click the **Print To** drop-down and select the printer to print to.
- Click **Print** or click **Preview** to view the report on-screen.

On-going Security Administration

Once your users have been identified and authorized to the correct functions, the security feature more or less takes care of itself. As new employees join your staff or leave the hospital, you will simply add them to the appropriate user group or mark them as Inactive. As you become more comfortable with the security feature and the functions that you can protect, it is likely that you will gradually fine tune the security on your system to a more restrictive, yet workable level.

Log On to AVImark

From this point on, you are using the security feature. This implies several things, including the fact that you will be prompted for a password each time you start AVImark. AVImark will automatically allow or disallow the user to perform protected functions, based on what you have specified. From the Windows desktop, start AVImark in the normal manner. The logon window will appear in the center of the screen requesting you to enter your password. Enter your password and then click **Logon**.

AVImark Compliance with FACTA Red Flags Rule

AVImark includes security features that will aid in hospitals efforts to be compliant with the new Fair and Accurate Credit Transactions Act (FACTA) Red Flags Rule. The Red Flags Rule sets out how certain businesses must develop, implement and administer Identity Theft Prevention Programs.

AVImark security must be in place to protect and secure client privacy. To begin using security in these areas you must give access to one user group that has authority to perform the task. These new security functions apply to fields in the Client Area that store personal client information.

Having the following functions secured will safeguard customer information from being viewed on the main screen of the CID, from being accessed when the Change Client window is open and from being accessed from Information Search reports or utility program reports that contain this information. It is our recommendation that each function be secured only to the hospital administrator group.

- **CLT12** – Change Client Drivers License
- **CLT13** – Change Client SSN

Unauthorized user groups will not be allowed to view or enter information in the SSN or DL fields in a New or Change Client window.

These security functions also protect the following areas:

- The third-party reports generated by CareCredit, ASAP and Kasper
- The SSN and Drivers License fields will be protected from printing on the Information Search
- The information in the SSN and Drivers License fields will not be viewable in the Enter Payment and Invoice windows.

AVImark Account Locking Feature

For hospitals that choose to use this feature, AVImark can now force users to correct mistakes by making Accounting and History adjustments, instead of only modifying amounts or removing entries. This feature is being implemented in order to help clinics ensure their historic data is consistent.

NOTE: Hospitals that use the AVImark Sidekick feature cannot use Account Locking when Importing. For more information contact AVImark Technical Support at 877-838-9273 opt 1.

The locking feature consists of three options stored within Users and Security. The Record Locking options can be restricted by time-frames that are explained below.

- From the CID, **Work With** menu, select **Users and Security**
- Select the menu option **File, Additional Security**



1. Lock Accounting Records

- **No Locking** - Set by default
- **By Day** - Ability to edit records for today's date only. Past accounting records are locked.
- **By Week** - Ability to edit records for 7 days.
- **By Month** – Ability to edit account records dated in the current calendar month.

2. Lock History Records

- **No Locking** - Set by default
- **After Posting** - Ability to edit un-posted Medical History; posted entries are locked.
- **By Day** - Ability to edit Medical History entries for today's date only.
- **By Week** - Ability to edit records for 7 days.
- **By Month** - Ability to edit entries for the current calendar month.

3. Seal Lock Permanently

- Seal Lock Permanently is used to permanently LOCK past Accounting and History records. You will find AVImark locks these files based on the Account and History locking selections that have been set. This option is unchecked by default. It can only be checked and unchecked by someone with System Wide Authority (ADMO1). All other users will receive a security message as notification that they are not authorized to set this function.
- When checked, AVImark will give a message prompt asking, "Are you REALLY sure you want to lock/unlock records? A log will be sent to MSS Headquarters for your record. Do you want to continue?" Yes or NO
- Clicking Yes will permanently seal the Accounting and History Locking options as they have been selected above. Having checked Seal Lock Permanently the Account and History selections are grayed out and cannot be changed by anyone other than ADMIN. (Once grayed out, the edit boxes can only be changed when Seal Lock Permanently has been unlocked by ADMIN.)

How AVImark works when Accounting\History Locking are in place:

- When an unauthorized user tries to make a change to Accounting or History they will receive a warning message saying, "You are attempting to modify LOCKED Medical Records. Account Locking was set by a System Administrator."
- **Built-In Utilities:** When Account Locking is active, AVImark prevents running built-in utilities that can alter Accounting and History records. Users will receive a warning message saying, "This utility is unable to run due to the Account/History Locking feature. Account Locking was set by a System Administrator."
- **Locking Prevents use of Sidekick:** Hospitals that have the Account Locking feature active will not be able to Import from Sidekick. When accessing Utilities.. Sidekick on the Server a warning message prompt says, "Sidekick feature is disabled due to the Account Locking feature. Account Locking was set by a System Administrator."
- **Transferring Accounting:** Locking Account records prevents using the **Right-click** Transfer option from the Accounting window. When attempting to transfer accounting to another client a warning message prompt says, "You are attempting to transfer LOCKED Accounting Records. Account Locking was set by a System Administrator."
- **Moving a Patient:** When using History Locking and moving a patient using **Right-click** Move from the Patient Area. AVImark will allow history records to be moved along with the Patient record, but the history remains locked and cannot be modified.

- **Backdate Medical History:** History Locking prevents backdating history entries when the date falls prior to the time-frame set. For example, if you are Locking History by Month, it should allow the date to be set back to yesterday, January 18th, but not to December 31st because December is locked. When trying to backdate beyond the time-frame specified AVImark will give a warning message prompt that says, “You are attempting to modify LOCKED Medical Records. Account Locking was set by a System Administrator.”

CHAPTER 22: TIME CLOCK

AVImark lets you track and report hourly employment activity. As the Hospital Administrator, you alone will be allowed to set up and edit Time Cards, print reports, and so on. As an employee, after you log into AVImark, you are given the opportunity to clock in and out using the Time Clock function.

In this chapter you will learn about...

- » Set up the Time Clock on page 293
- » Enter Clock out Reasons on page 294
- » Track Hourly Staff on page 294
- » Work with the Employee Time Card on page 295
- » Use the Time Card Report on page 295
- » Undo and Redo Time Card Changes on page 296
- » View History of Entry on page 297

Set up the Time Clock

To set up the Time Clock, you should set options regarding the rounding of clock in and out times, when to display the employee's time card and synchronizing the time on your workstations with that on the server. Also, if you have not set up AVImark Security, you should do that to protect at least basic security functions. If you're not sure how to do this, refer to "*CHAPTER 21: SECURITY ADMINISTRATION*".

- On the CID, open the **Work with** menu. Click **Users and Security** to display the Security Maintenance window.
- On the **Time Clock** menu, click **Setup** to display the Time Clock Options window.

When clocking in

Use this field to clock in your employees as of a time of day rounded back to a previous time value. For in-

stance, an employee clocks in after lunch at 1:03 pm. You would like to give your employees no more than a five minute grace period. In this case, you would set this value to “5”. By doing this, each time an employee clocks in, their actual time, as recorded in AVImark, would be rounded back to the nearest 5 minute value--in this example, 1:00 pm.

- If appropriate, type a value, using a whole number, in the **When clocking in** field.

When clocking out

Use this field to clock out your employees as of a time of day rounded forward to a future time value. For instance, an employee clocks out for lunch at 11:57 am. You would like to give your employees no more than a five minute grace period. In this case, you would set this value to “5”. By doing this, each time an employee clocks out, their actual time, as recorded in AVImark, would be rounded ahead to the nearest five minute value--in this example, 12:00 noon.

- If appropriate, type a value, using a whole number, in the **When clocking out** field.

Display the Time Card

AVImark gives you two options in which to display an employee’s Time Card. It can be displayed when they are not clocked in “Only”, or you have the option to have it displayed every time the employee logs into AVImark. Most of the time, employees will be allowed to log out and back into AVImark while they are still “on the clock” and would not want to be bothered with the Time Card window every time. With the top box checked, if the employee is still clocked in, the Time Card will not be displayed when they log out and back into AVImark. With the second option checked, AVImark will display the Time Card every time.

- Choose the desired option for displaying the Time Card.

Synchronize workstation clock with the server

The AVImark Time Clock feature offers the option to synchronize the time of day with the server. By checking this option, each time a user clocks in or out of the Time Clock, AVImark forces the system time-of-day on all workstations to match that of the server. Once you check the “Synchronize workstation clock with the server” box, you will need to specify the server’s location on the network. You have three choices in which to access the server by.

- Choose the appropriate option from the **Access server by area**.

Enter Clock out Reasons

When an employee clocks out, they will need to select from a list of reasons, why they are clocking out. You

	To learn more about: Time Clock Setup	Search the Help for: Time Clock Menu
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will need to set up a table of typical reasons for clocking out. This list will be set up in System Tables, Clock out reasons. For more information on entering Clock out reasons, refer to “*CHAPTER 2: SYSTEM TABLES*”.

Track Hourly Staff

Of course, there are certain staff that work by the hour and those who do not. You will need to tell AVImark which personnel you wish the Time Clock function to track.

- On the CID, open the **Work with** menu. Click **Users and Security** to display the Security Maintenance window.
- Choose the **Category** group which is made up of hourly employees.
- From the **Users for** section, select the **Name** of one of the hourly users.
- Right-click and from the shortcut menu click **Change** to display the Change User window.

- Check the **Clocks In** box. This option must be checked in order to open the Time Clock.
- In the **Period Start** field, use the drop-down calendar and select the **Date** which the users Time Card will default to.
- If appropriate, check the **Track Overtime by Day** box and then use the UP and DOWN ARROWS to indicate the daily regular hours before overtime starts.
- Click **OK** to save the changes. Repeat this process for each staff member for whom you wish to track hourly activity.

Work with the Employee Time Card

Whenever an employee clocks in or out, that activity is recorded on the employee’s individual Time Card.

Clock in

Whenever an employee logs into AVImark, if they are not already clocked in, AVImark will automatically open that person’s Time Card window. When an employee is already logged into AVImark, but not clocked in, they will need to access their Time Card through the Utilities menu.

- On the CID, open the **Utilities** menu. Click **Time Card** to display the employee’s Time Card.
- Click **Clock In**. After the date and time have been added to the Time Card click **Done**.

Clock out

When an employee is ready to clock out, they will need to open the **Time Card** to clock out and select a reason for clocking out.

- On the CID, open the **Utilities** menu. Click **Time Card** to display the employee’s Time Card.
- Click **Clock Out** to display the Clock-Out Reason window.
- Use the **Reason** drop-down list and choose a clock out reason.
- Click **OK**.

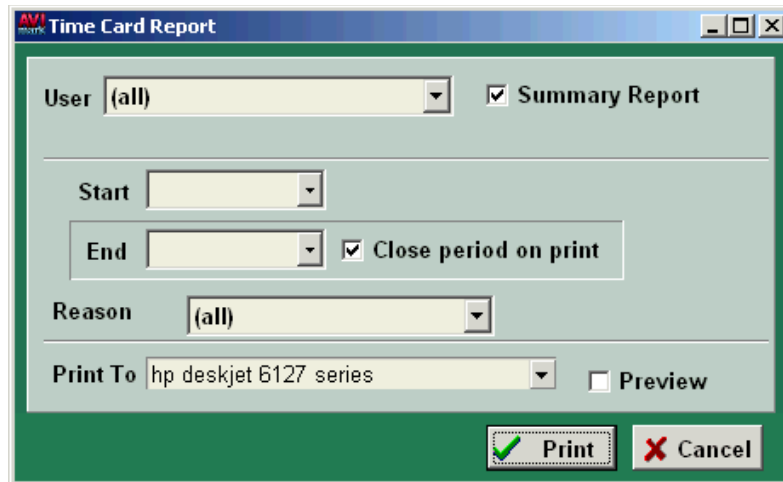
Use the Time Card Report

	To learn more about:	Search the Help for:
	Start a Pay Period	Adding & Changing Staff
	Add Notes to a Time Card	Time Card
	Accessing the Time Card	Time Card

AVImark gives you the ability to print, email, save and/or export the Time Clock Report. This report may be accessed through both Users and Security and the Utilities menu. When printing the Time Card Report, there is a summary report option that will calculate overtime based on a forty hour work week. When running a summary report, overtime total by day may also be shown.

Print the report

- On the CID, open the **Utilities** menu. Click **Time Card Report** to display the Time Card Report window.



- Using the **User** drop-down list, select the employee you wish to print for or select **(all)**.
- Use the **Start** and **End** drop-down lists to indicate the period to print for. If you wish to close the current period, leave the **Close Period on print** box checked.
- In the **Print To** field, use the drop-down list to choose the printer to print to.
- Click **Print** or select **Preview** and click **Print** to preview an onscreen report.

Email the report

- **Preview Print** the report.
- On the Report Preview window, open the **File** menu. Click **Email**.
- Enter the **email address**, desired **subject** and **text** and click **Send**.

Save the report

- **Preview Print** the report.
- On the Report Preview window, open the **File** menu. Click **Save As**. The report may be saved as a PDF, HTML, RTF, TXT or an NDR file.

Export the report to Excel

- In the **Print To** drop-down list, select **Excel** and then click **Print** to display the report in Excel format.
- After the report has been generated, you may print, email and/or save the report using the same procedures as previously discussed.

Undo and Redo Time Card Changes

Any change in the Time Card window can be undone or redone. This is accomplished within the Time Card window. These options will not be available for Users who can not Change or Remove Time Clock entries.

- On the Time Card window, open the **Edit** menu. Click **Undo Change User Category** or **Redo Change User Category**.

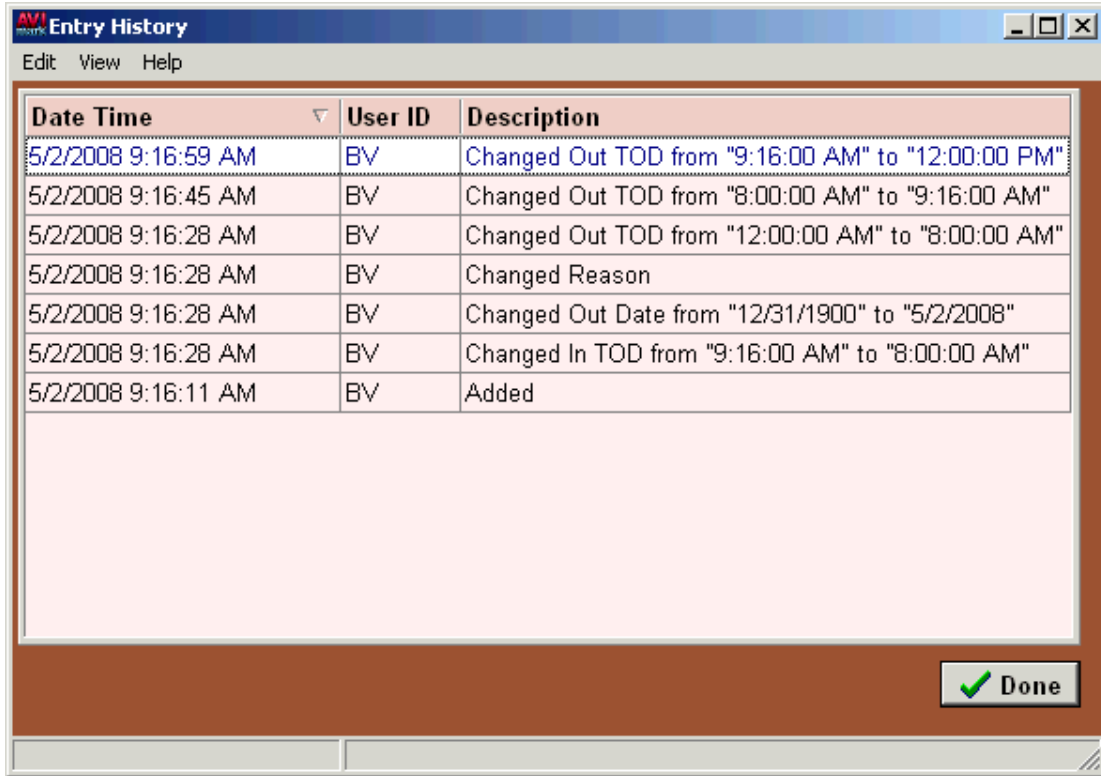


To learn more about:
Change Time Card Entries

Search the Help for:
Change Time Clock

View History of Entry

When a change to a line entry in the Time Card has been made, AVImark will create a log that records the Date, Time, User and the action that was used to make the change of the line entry.



- On the Time Card window select the entry you wish to view the history of.
- Open the **View** menu and click **Entry History** to display the Entry History window.

CHAPTER 23: WORD PROCESSING

AVImark allows full access and integration with Microsoft Word® for all your word processing needs. You will be able to use several special *merge words* in the text of any MS Word® document, which will insert the correct information from your data files, along with importing digitized images and pictures of your clients, animals or images linked with medical records. Your hospital logo may also be included on any document. AVImark has the ability to use the Sun Microsystems's products; StarOffice® and OpenOffice®, as alternative word processors. OpenOffice® is a free open source where as StarOffice® can be downloaded at a minimal charge. Although Microsoft® is not an absolute requirement, it is a recommended program for at least one computer on your network. As of this printing, StarOffice® and OpenOffice® do not have the capability to print reminders in AVImark, nor does AVImark support the spreadsheet capabilities of these products.

In this chapter you will learn about...

- » Use Merge Words on page 299
- » Use Merge Words for Additional Data Fields on page 307
- » Work with Microsoft Word® on page 307

Use Merge Words

By typing merge words in the text of virtually any correspondence, AVImark will insert the correct information, at that position in the text. When using a merge word that would require a text box - that is, animal-pictures, graphs, or weight-graphs - AVImark will not allow this document to be printed through OpenOffice®/StarOffice®. To print a photo or graph using these products, the text box must be removed. When using merge words in a document or in an AVImark notes window, include the less than (<) and greater than (>) symbols, before and after the word as shown below.

AVImark	MS WORD®	MERGE WORD	DESCRIPTION
●	●	<address>	the client's address, (1564 East Walnut Ave)
	●	<added>	date client added
●	●	<address2>	the client's second line of address, (P.O. Box 356)
●	●	<age>	the age of the patient, (3w)
	●	<age-name>	the full description of the age, (3 weeks)
	●	<allergy>	the allergy specification of the patient, (Flea)
●	●	<animal>	the patient's name
	●	<animal-alert>	the animal's alert message
	●	<animal-folder>	the patient's folder number
	●	<animal-names>	list of living pets, (names only)
	●	<animal-notes>	Will include any notes placed in patient area, do not include this merge word with other text on the same line.
	●	<animal-pic>	the patient's picture
	●	<animals>	a list of living animals for this client, (includes breed, sex, age, and species)
●	●	<appt-date>	the date of the patient's next appointment

●	●	<appt-doctor>	doctor's initials assigned to the patient's next appointment
●	●	<appt-doctorname>	the doctor's name assigned to the patient's next appointment
	●	<appt-notes>	Any notes attached to the appointment. Only to be used on the check-in document.
●	●	<appt-time>	the time of the patient's next appointment
●	●	<appt-treatments>	treatments chosen for the patient's next appointment
●	●	<area>	the client's Area Code, (604)
●	●	<balance>	the client's balance due, (231.45)
●	●	<birthday>	the patient's birthday, (12-23-90)
	●	<bovines>	a list of living bovines for this client
●	●	<breed>	the breed of the patient
●	●	<business>	the client's business phone number
	●	<canines>	a list of living canines for this client
	●	<cell-phone>	the client's cellular phone number
●	●	<census>	the client's name, patient's name, facility, check-in date, and check-out date of all patient's currently checked in
●	●	<census-in>	Patients check-in or Inpatients
●	●	<census-out>	Patient checked-out or Out-patients
●	●	<census-hosp>	Patients checked-out as Hospitalization
	●	<certificate>	the current rabies certificate number
	●	<check-in>	the check-in date of the patient's boarding or hospitalization
	●	<check-out>	the check-out date of the patient's boarding or hospitalization
	●	<checkin-waiting>	The patient's date and time of check-in The Patient is Waiting option must be selected for that patient in order for this merge word to work.
●	●	<city>	the client's city of residence, (Patterson)
	●	<client>	the client's last name
●		<client-alert>	the client's alert message
●		<client-notes>	all notes entered for the client

●		<client-pic>	the client's picture
●	●	<co-address>	the address of the hospital, (453 East Elm St.)
●	●	<co-address2>	the second line of hospital address
●	●	<co-city>	the city of the hospital
●	●	<co-phone>	the hospital phone number
●	●	<co-slogan>	the hospital slogan as listed in Hospital Setup
●	●	<co-st>	the state of the hospital
●	●	<co-zip>	the zip code of the hospital
●	●	<color>	the color of the patient
●	●	<company>	the name of your hospital
●	●	<colorb>	the body color of patient (AVImarEQ only)
●	●	<colore>	the eye color of patient (AVImarEQ only)
●	●	<colorh>	the hoof color of patient (AVImarEQ only)
●	●	<colorm>	the mane color of patient (AVImarEQ only)
●	●	<colors>	the sclera color of patient (AVImarEQ only)
●	●	<colort>	the tail color of patient (AVImarEQ only)
	●	<contact>	the client's first name
	●	<county>	the client's county name
	●	<currentestimate>	Used to print estimates on templates from the Pred Tablet® only.
	●	<current-userid>	The ID or initials of the staff member currently logged onto AVImark.
	●	<current-username>	The name of the staff member currently logged onto AVImark.
●	●	<damname>	The dam name of patient (AVImarEQ only)
●	●	<date>	the current date, (01-13-94)
	●	<death>	date of death, (date service performed with Action Code of "D")
	●	<dx-descriptions>	The description of all diagnosis that are in a patients Medical History.
	●	<e-mail>	the client's e-mail address
	●	<employer>	the client's employer

	●	<equines>	a list of living equines for this client
	●	<estimate>	a list of services that make up the selected estimate
	●	<est-entry-user>	The name of the logged in user who created the estimate
	●	<est-expires>	Expiration date of the printed estimate.
	●	<estimate-name>	The name of the current estimate
	●	<estimate-doctor>	the doctor selected for a particular estimate
	●	<estimate-minus>	prints the normal estimate detail without the quantities
	●	<estimate-range>	prints the price variance for each item on the estimate plus a total
	●	<expiration>	an inventory item's expiration date
	●	<facility>	the facility the current patient was most recently contained in while checked into boarding
●	●	<fax>	the client's fax number
	●	<felines>	a list of living felines for this client
	●	<ferrets>	a list of living ferrets for this client
	●	<first-and-spouse>	Client and spouse first names
●	●	<first-name>	the client's first name, (John)
●	●	<folder>	the client's folder number
	●	<full-list>	a list of patients due and all treatments due for each
	●	<graph>	prints an AVImark graph on documents
●	●	<gst>	prints the tax ID number for Canadian clinics
●	●	<he>	the correct pronoun, ('he' or 'she')
	●	<hers>	the correct pronoun, ('his' or 'hers')
●	●	<him>	the correct pronoun, ('him' or 'her')
●	●	<his>	the correct pronoun, ('his' or 'her')
●	●	<id>	the patient's micro-chip or tattoo number
	●	<item-category>	the category name for the item
●	●	<item-code>	The code of the item
	●	<item-codes>	the action code(s) for the item
	●	<item-cost>	the amount last paid for the item, (package)
	●	<item-description>	the item description
	●	<item-location>	the item location, (the 'loc' field)
	●	<item-measure>	the item unit of measure

	●	<item-price>	the normal price of the item.
●	●	<height>	the height of patient (AVImarkEQ only)
●	●	<[History-Doctor-DEA]>	the doctor's DEA number that performed the selected service
	●	<item-upc>	the UPC code for the item
	●	<item-vendor>	the vendor name for the item
●	●	<lasthistdate>	Will print the date of the patient's last Medical History entry (posted or unposted) as the date of its last visit.
●	●	<last-name>	the client's last name
	●	<license>	the client's drivers license number
●	●	<list>	a list of patients due reminders on a consolidated card
●	●	<locating-service>	the locating service (AVImarkEQ only)
	●	<locator>	information about the Pet Portal's patient ID number
	●	<logo>	the hospital logo graphic
●	●	<markingb>	the body marking of patient (AVImarkEQ only)
●	●	<markingh>	the head marking of patient (AVImarkEQ only)
●	●	<markinghoof>	the hoof marking of patient (AVImarkEQ only)
●	●	<markinglfl>	the left foreleg marking of patient (AVImarkEQ only)
●	●	<markinglhl>	the left hind leg marking of patient (AVImarkEQ only)
●	●	<markingm>	The mottling marking of patient (AVImarkEQ only)
●	●	<markingrfl>	The right foreleg marking of patient (AVImarkEQ only)
●	●	<markingrhl>	The right hind leg marking of patient (AVImarkEQ only)
	●	<measure>	the unit of measure of the patient weight
	●	<mfg-code>	the manufacturer's code for the item
●	●	<number>	the client's AVImark Client ID Number
●	●	<old-tag>	the tag number of the last rabies vaccination
	●	<on-hand>	the item on-hand quantity
	●	<on-order>	the item quantity currently on order
	●	<order-pack>	the item order-pack quantity
	●	<order-point>	the order point for the item
	●	<order-qty>	the item on-order quantity
	●	<overdue>	a list of services, with reminders attached to them, that are past due for the patient
	●	<patient-record-id>	patient's record number

	●	<pref-doctorname>	clients preferred doctor
●	●	<phone>	the client's home phone number, (555-6079)
	●	<photo>	current photo of the patient
●	●	<rabies>	the current rabies tag number
	●	<referred-by>	the referring clients account number and last name
	●	<reminders>	the reminder schedule for the patient
	●	<rel-address>	address of the client in the Relationship field
	●	<rel-address2>	the second line of address of the client in the patient's Relationship field
	●	<rel-business>	the associated client's work phone number
	●	<rel-city>	the city of the client in the patient's Relationship field
	●	<rel-email>	the email address of the client in the patient's Relationship field
	●	<rel-fa•>	the fa• number of the client in the patient's Relationship field
	●	<rel-first-name>	the first name of the client in the patient's Relationship field
	●	<rel-last-name>	the last name of the client in the patient's Relationship field
	●	<rel-phone>	the telephone number of the client in the patient's Relationship field
	●	<rel-st>	the state of the client in the patient's Relationship field
	●	<rel-title>	the title of the client in the patient's Relationship field
	●	<rel-zip>	the zip code of the client in the patient's Relationship field
●	●	<rf-address>	the referring client's address
	●	<rf-address2>	the referring client's second line of address
●	●	<rf-city-st-zip>	the referring client's city, state, and zip code
	●	<rf-client>	the referring client's account number
	●	<rf-faxno>	the referring client's fax number
●	●	<rf-first-name>	the referring client's first name
●	●	<rf-last-name>	the referring client's last name
	●	<rf-phone>	the referring client's phone number
●	●	<rf-title>	the referring client's title
●	●	<serv-amount>	the selected service amount
●	●	<serv-code>	the selected service code
●	●	<serv-date>	the selected service date

●	●	<serv-description>	the selected service description
●	●	<registration-name>	The registration name of patient (AVImarkEQ only)
●	●	<serv-doctor>	the doctor's ID (initials) performing the selected treatment
●	●	<serv-doctorname>	the doctor's full name performing the selected treatment
	●	<serv-license>	the doctor's license number that performed the selected service
	●	<serv-notes>	medical history notes
	●	<serv-pic>	a photo that has been linked to a treatment into a document
●	●	<serv-qty>	the selected service quantity
●	●	<sex>	the sex code of the patient, (S)
●	●	<sex-name>	the sex name, (Male, Female)
●	●	<sirename>	The registration name of patient (AVImarkEQ only)
	●	<site-address>	the address of the current site, (site clinics)
	●	<site-city>	the city of the current site, (site clinics)
	●	<site-name>	the hospital name of the current site, (site clinics)
	●	<site-phone>	the area code and phone number of the current site, (site clinics)
	●	<site-state>	the state the current site resides in, (site clinics)
	●	<site-zip>	the zip code of the current site, (site clinics)
	●	<soap-abnormalities>	Selected abnormalities within the Objective area
	●	<soap-abnormality-%>	Selected individual abnormalities. Replacing the percent sign with the code of an abnormality will include linked notes for that abnormality.
	●	<soap-assess-notes>	Free-form notes that are linked to the Assessment area
	●	<soap-bcs>	Actual BCS value within the Vital Signs area
	●	<soap-bcs-high>	High BCS value within the Vital Signs area
	●	<soap-crt>	CRT value within the Vital Signs area
	●	<soap-diagnoses>	Diagnosis codes that have been accepted into the Assessment area of the SOAP record

	●	<soap-diagnostic>	Diagnostic codes that have been accepted into the Plan area of the SOAP record
	●	<soap-heart-rate>	Heart rate value within the Vital Signs area
	●	<soap-instructions>	Client Instructions within the Objective area
	●	<soap-other>	Actual Other value within the Vital Signs area
	●	<soap-other-high>	High Other value within the Vital Signs area
	●	<soap-obj-notes>	Free-form notes that are linked to the Objective area
	●	<soap-painscale>	To show on the Report Card
	●	<soap-plan-notes>	Free-form notes that are linked to the Plan area
	●	<soap-problems>	Problems that are linked to the SOAP record within the Presenting Problems area
	●	<soap-problem-protocols>	Diagnostic protocols that are linked to problems listed in the Presenting Problem area
		<soap-problem-ruleouts>	Rule-out protocols that are linked to problems listed in the Presenting Problem area
	●	<soap-resp-rate>	Respiratory rate value within the Vital Signs area
	●	<soap-ruleouts>	Rule-out protocols that have been accepted into the Assessment area of the SOAP record
	●	<soap-subj-notes>	Free-form notes that are linked to the Subjective area
	●	<soap-temp>	Temperature value within the Vital Signs area
	●	<soap-therapeutic>	Therapeutic codes that have been accepted into the Plan area of the SOAP record
	●	<soap-weight>	Weight value within the Vital Signs area
●	●	<species>	the patient's species name, (Canine)
●	●	<species-name>	patient's species common name, (in Species Table)
●	●	<spouse>	the client's spouse name
●		<ssn>	the client's Social Security number
●	●	<st>	the client's state of residence, (MO)
●	●	<std-date>	the current date, (June 7, 2010)
●	●	<time>	the current time, (for example, 12:14)
●	●	<title>	the client's title
●	●	<treatments>	the list of remindable treatments the patient is due for
	●	<user-friendly>	prints the doctor's "user friendly" name

	●	<vacc-admin>	the vaccine method of administration
	●	<vacc-date>	the vaccination date
	●	<vacc-description>	the vaccination description
	●	<vacc-doctor>	the doctor ID that performed service, (having a vaccine spec.)
	●	<vacc-dosage>	Prints, on the Rabies certificate, the items measure (cc or ml) attached to a Rabies vaccination or the item measure directly entered in Medical History.
	●	<vacc-due>	the vaccination date due
	●	<vacc-exp>	the vaccine expiration date
●	●	<vacc-id>	the rabies tag number of the vaccination
	●	<vacc-license>	the doctor's license performing this vaccination, (having a vaccine spec.)
●	●	<vacc-lot>	the vaccine lot number
●	●	<vacc-mfg>	the vaccine manufacturer
	●	<vacc-name>	the vaccine 'Code' in Work with...System Tables... Vaccine Table
	●	<vacc-virus>	the vaccine virus type
	●	<vaccs>	a list of services performed that include a "V" Action Code
	●	<web-address>	the hospital web address specified in Hospital Setup, Demographics Tab in the Web site field
●	●	<weight>	the weight of the patient, (25 lbs.)
	●	<weight-graph>	the patient's entire weight history in a graph form
	●	<workstation>	provides the computer name of the workstation being used
●	●	<zip>	the client's Zip/Postal Code, (63956 or A4R3E3)

Use Merge Words for Additional Data Fields

If and when you define additional data fields related to clients, animals, treatments, inventory items, and/or diagnoses, AVImark allows you to use the name you assigned to each of the fields as a merge word to be used in any MS Word document. AVImark also allows you to merge photos into MS Word documents using More Stuff data fields of type *Photo*.

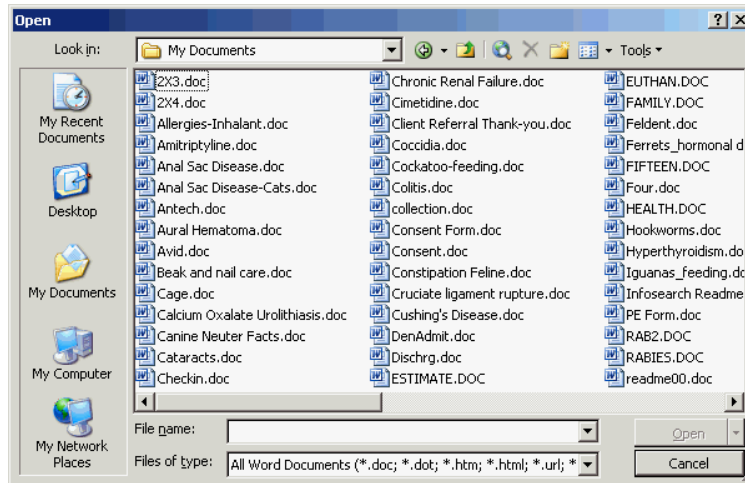
- Type the name of the additional data field into the document text.
- Enclose the name with the **Less than (<)** and **Greater than (>)** symbols.

Work with Microsoft Word®

AVImark gives you the ability to work with and create new documents using Microsoft Word. Although working with Microsoft Word is very beneficial, it is obviously beyond the scope of this manual to try to explain the details of this software product.

Open an existing document from the CID

- On the CID, open the **Applications** menu. Click **MS Word** to display the MS Word Document display window.
- On the MS Word Document display, open the **File** menu. Click **Open** to display the Open Window.



- Select the document you wish to work with. Click **Open** to display the document.
- After the necessary changes have been made, open the **File** menu and click **Save** or **Save as**.
- You will need to close MS Word.

Create a new document from the CID

- On the CID, open the **Applications** menu. Click **MS Word** to display the MS Word Document display window.
- On the MS Word Document display, open the **File** menu. Click **New** to display the New Document window.
- Choose from among the sample templates to begin with an appropriate document style and click **OK**.
- Use the prompts on the sample form to type the new document, using the appropriate merge words if applicable.
- On the **File** menu, click **Save as** to display the Save as window.
- In the **File name** window, type the name you wish to save the document as and click **Save**.

Delete a document from the CID

- On the CID, open the **Applications** menu. Click **MS Word** to display the MS Word Document display window.
- On the MS Word Document display, open the **File** menu and click **Open** to display the Open Window.
- Select the document you wish to delete. **Right-click** and from the shortcut menu click **Delete**.
- You will need to click **Yes** to confirm.



To learn more about:

Specify using MS Word®/Open Office®

Search the Help for:

Table of Contents – Word Processing & Forms

CHAPTER 24: DISCOUNT PLANS

AVImark provides the means to put a patient on a health maintenance plan including provisions for automatic discounting for specific treatments, courtesy discounting on others, and automatic reminding for plan renewal at the end of the period covered by the plan. The function allows the hospital to charge the customer *up front* for a treatment program for the patient and then automatically track the patient's progress throughout the plan as time progresses. Provision is made for any number of discount plans to be defined by the hospital and any client may have each of their animals on a different plan. However, any given patient may only be qualified for one plan at a time.

In this chapter you will learn about...

- » Defining a Discount Plan on page 309
- » Reminding for the Plan on page 309
- » Tracking Discount Plans on page 309
- » Setting Up a New Plan on page 309
- » Specifying Covered Services on page 310
- » Changing the Discount Rate and/or Quantity of a Selected Service on page 311
- » Putting a Patient on a Plan on page 311

Defining a Discount Plan

First, it is important to understand that a discount plan is represented by a *treatment* in your Treatment List. This is not an actual treatment of course but simply acts to identify the plan and define its cost to the customer. It also acts as a basis upon which to remind for the plan, later on a regular basis. It is recommended that you create a new category of treatments called something like *Health Plans* in your Treatment List, in which you will add all the different plans you intend to offer your clients. Each plan within the category will consist of treatments that you will create using an appropriate code, description, as well as a price.



To learn more about:

Define Covered Services

Search the Help for:

Discount Plan Table

Reminding for the Plan

Once these treatments have been created, you may want to set up reminder templates using the same procedures as you would for normal treatments within your Treatment List. For more information on setting up reminder templates, refer to "*CHAPTER 11: REMINDERS*".

Tracking Discount Plans

Using the AVImark End of Period Reports, you may choose to print the Health Plan Report that tracks those patients currently on a Health/Discount Plan.

Adding a Plan

AVImark needs to know that the "treatment" you created, is actually a discount plan. Also you will need to specify the covered services associated with the plan. This will be accomplished by adding the treatment to System Tables, in a table called Discount Plan Table.



To learn more about:

Add new Treatments/Categories
Remind for a Plan
Health Plan Report

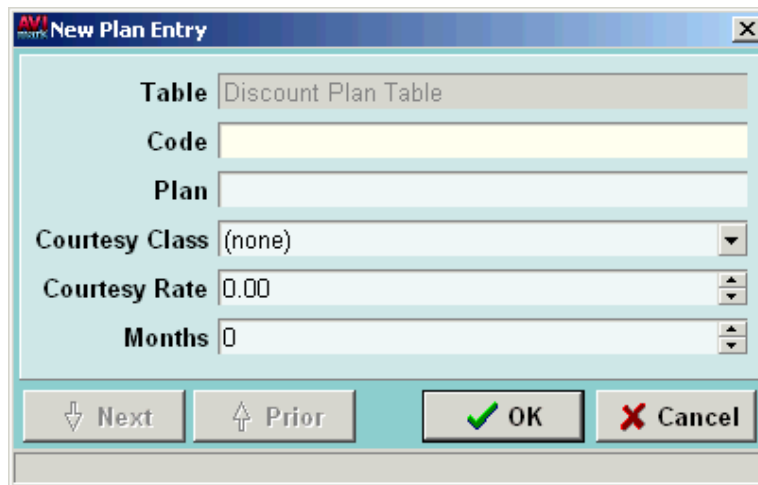
Search the Help for:

Set up Treatment List
Discount Plans
Health Plan Report

Setting Up a New Plan

- From the CID, open the Work with menu. Click **System Tables** to display the System Tables window.

- From the Table section, click **Discount Plan Table**.
- Point in the **Entries for Discount Plan Table** section. **Right-click** and from the shortcut menu click **New** to display the New Plan Entry window.



Code

This field will be the code of the treatment which is already defined in your Treatment List.

- Type the plan **Code** as defined in your Treatment List.

Plan

After the correct Code has been entered AVImark will enter the Plan description for you.

Courtesy Class

This field allows you to specify a Client Discount Class that should be applied to clients and patients that purchase the Discount Plan.

- Using the **Courtesy Class** drop-down, select the appropriate **Client Discount Class**.

Courtesy Rate

AVImark allows you to specify what percentage discount is to be allowed on all treatments and/or inventory items NOT specifically covered by the plan.

- If appropriate, specify a **Courtesy Rate** percentage using whole numbers.

Months

This field indicates the number of months the plan will be active. Discounts defined in the plan will be extended to the client **ONLY** for the number of months from the day the plan is entered into the patient's Medical History.

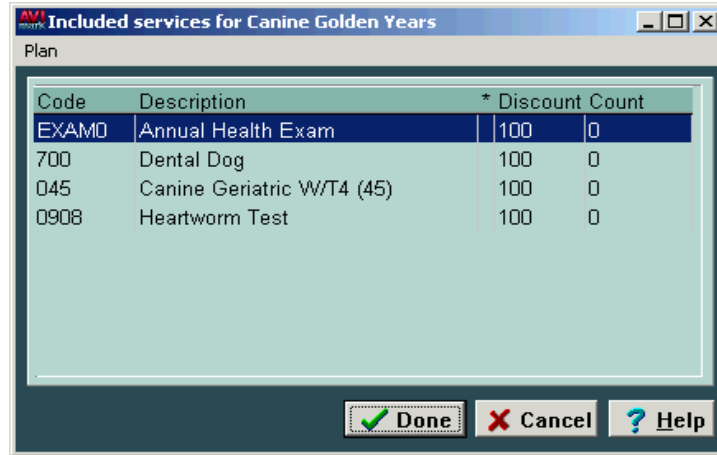
- Using the UP and DOWN ARROWS, specify the number of months for the plan.
- Click **OK** to save the entry. Another New Plan Entry window will display which will allow you to enter the next New Plan Entry.
- When finished with all entries, click **Cancel**.

Specifying Covered Services

- From the **Entries for Discount Plan Table** section, click the **Plan** you wish to define.
- **Right-click** and from the shortcut menu click **Included services** to display the Included services window.
- In the Included services window, **right-click** to see the shortcut menu. Point to **Choose** and click

Treatments, Items, Diagnosis and/or **Problems** to display the appropriate list.

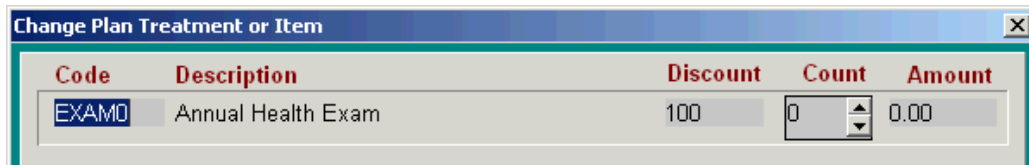
- Select the treatments, items, diagnoses and/or problems you wish to add to the plan.



- Click **Done** after all services have been added.

Changing the Discount Rate and/or Quantity of a Selected Service


- From the Included services window, select the treatment, item, diagnosis and/or problem you wish to change.
- **Right-click** and from the shortcut menu click **Change** to display the Change Plan Treatment or Item window.



- If appropriate, use the **Discount** field to type the discount percentage allowed for this service.
- If appropriate, use the **Count** field to enter the number of times the service can be performed during the plan period and still qualify for the discount.
- Click **Done** on the Change Plan Treatment or Item window. Click **Done** on the Included services window.

Putting a Patient on a Plan

When a client has decided to purchase one of your discount plans, simply enter the defining “treatment” into the Medical History area for the correct patient. This will initiate the discounting process specific to this plan and allows for the renewal reminding to take place a year later. From this point on, any treatments and/or items performed which are covered under the plan, will be priced according to the values and qualifications described above. When the plan expires, AVImark will automatically remind for plan renewal and halt the discounting process until the client chooses to purchase the plan once more.

	To learn more about:	Search the Help for:
	Courtesy Class Health Plans	Discount Plans

CHAPTER 25: ADDITIONAL DATA FIELDS

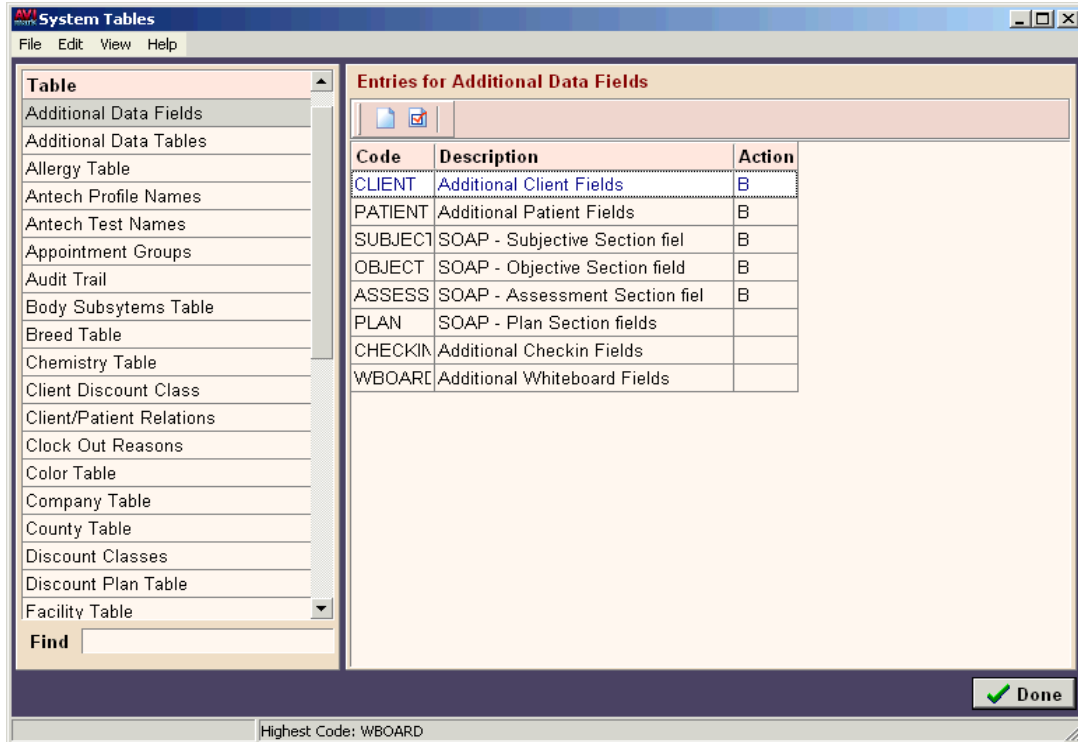
AVImark allows you to add extra fields of information to those already existing in AVImark. For instance, you may want to add a field for client information called, “Spouse phone” in order to record the spouse’s phone number. AVImark allows you to define any number of Additional Data Fields for clients, patients, treatments, SOAP records and Whiteboard. These Additional Data Fields may be of several different types and you may add as many fields as you wish. Telling AVImark which fields you want to add to the system and what type of data you intend to enter into each of the fields might be called *Additional Data Field definition*.

In this chapter you will learn about...

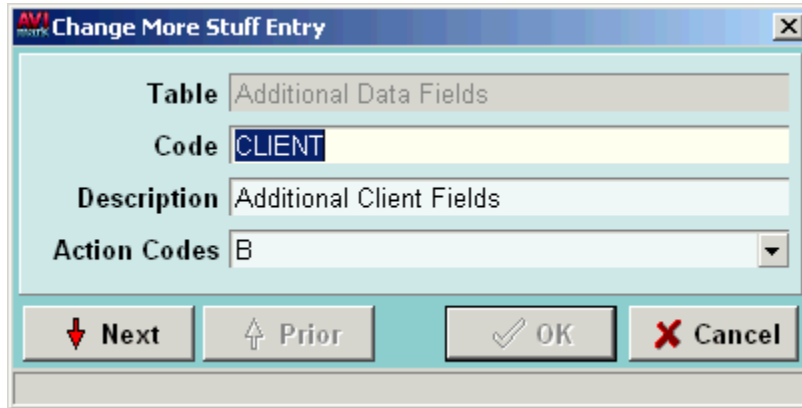
- » Define Additional Data Fields for Clients/Patients on page 313
- » Set Normal Values on page 317
- » Define Additional Data Fields for Treatments on page 317
- » Set up a Data Table on page 318
- » Define Additional Data Fields for SOAP Records on page 319
- » Define Additional Data Fields for Whiteboard on page 319
- » Create New Generations of Definitions on page 320
- » Enter Information on the CID on page 320
- » Enter Multiple Entries on page 320
- » Enter Information into the Diagnosis Window on page 321

Define Additional Data Fields for Clients/Patients

- On the CID, open the **Work with** menu. Click **System Tables** to display the System Tables window.
- From the Table section, click **Additional Data Fields** to display the entries for this table.



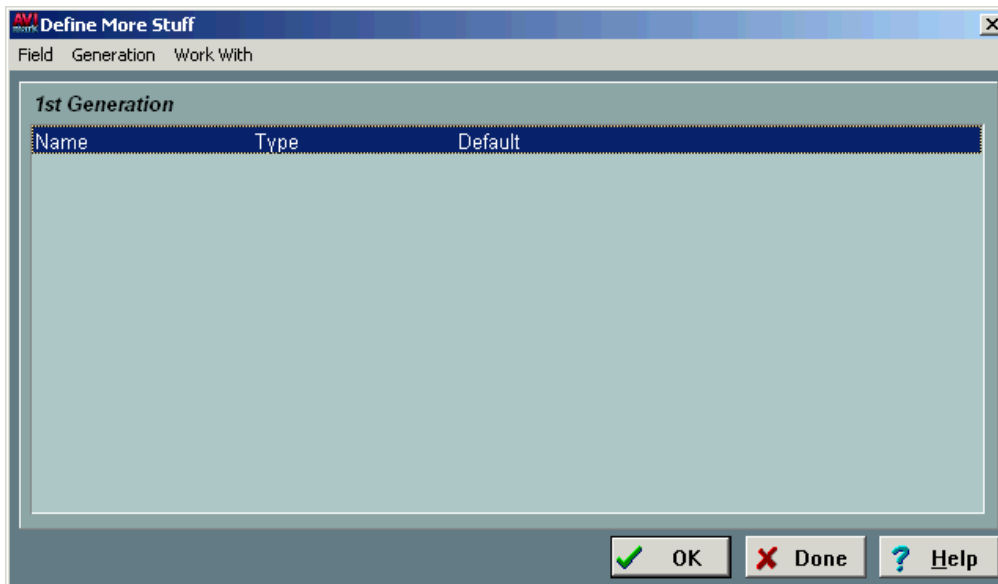
- From the Entries for Additional Data Fields section, select **Client**. Right-click and from the shortcut menu click **Change** to display the Change More Stuff Entry window.



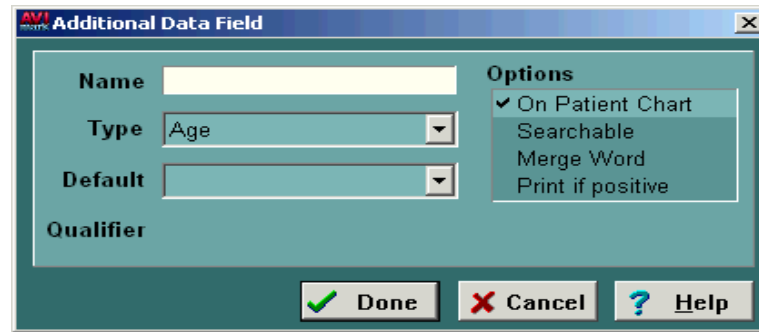
- The **Code** and **Description** fields will be defined for you.
- If appropriate, use the **Action Codes** drop-down list and select the **B** Action Code. By selecting the **B** Action Code, AVImark will automatically prompt you to input additional client information each time you add a new client to your system.
- Click **OK**.

Add data fields

- In the Entries for Additional Data Fields area, select **Client**.
- Right-click and from the shortcut menu click **More Stuff Fields** to display the Define More Stuff window.



- Point in the **Define More Stuff** window. Right-click and from the shortcut menu click **New** to display the Additional Data Fields window.



Name

This is the name that staff will see when entering new information.

- Type an appropriate name or other identifier.

Type

This field indicates the type of data that will be used.

DATA TYPE	DESCRIPTION
Age	Use this field type when the data will be some age value.
Date	Use this type of field when you intend to use the field to hold a date. Use the format: “MM-DD-YY” (i.e. “08-11-10” for August 11, 2010). If appropriate, use the drop-down Default menu to choose an appropriate default value for this field definition.
Decimal	Use this field type for values that require a decimal point. If appropriate, use the drop-down Default menu to choose an appropriate default value for this field definition.
Diagnosis	Use the Diagnosis field type for inputting any of the diagnoses in Work with, Diagnoses . This field type might be used in a table of other Additional Data Fields related to a patient “check-in” procedure or S.O.A.P. format for patient medical history. See the topic called “ <i>Entering Information into the Diagnosis Window</i> ”.
Integer	Use this field type when the field is intended to be used for integer values (whole numbers), such as counters, quantities, etc. Be aware that a field of this type can “hold” any value between -32, 767 and +32,768, so plan accordingly. If the numerical value you need to record for this field is sometimes outside this allowable range, use the Decimal type instead. If appropriate, use the drop-down Default menu to choose an appropriate default value for this field definition.
Item	Use this field type when the data is to be an Item Code from the AVImark Inventory List in Work with, Inventory .
Photo	Use this field type to enter any digitized image (photo or scanned image) into the data field.
Phrase	Use this field type when you intend to enter up to 255 characters of descriptive information in this field. Contrast this field type with “W/P” (Word Processing) that allows you to enter unlimited scroll text in a separate “notes” window. This field type will also let you choose a system table.

Pos/Neg	Use this field type when the information is either Positive or Negative . These are the only two allowable values for this field type. If appropriate, use the drop-down Default menu to choose an appropriate default value for this field definition.
Sen/Res	Use this field type for Susceptibility (results of lab tests). The allowable values you can select with this field type are Susceptible , Mod Suscept (Moderately Susceptible), Resistant , Not Tested and Not Done .
Table	This is a very powerful field type in AVImark. It allows you to enter a table of values that is unlimited in the number of rows and whose width is limited only by the size of your printer.
Time	Use this field type when you intend to use the field to hold a time value. Use the format: “HH;MMa (or p)” (i.e. “7:46a” for seven forty-six am). If appropriate, use the drop-down Default menu to choose an appropriate default value for this field definition.
Treatment	Use this type when the data is to be a Treatment Code form the AVImark Treatment List.
User	Use this type definition when the data is one of your staff as listed in Work with, Users & Security . If appropriate, use the drop-down Default menu to choose an appropriate default value for this field definition.
W/P	This indicates that this field is a Word Processing field. This means that when you want to enter information into the field, you will open a window and will be allowed to enter unlimited scrollable word-wrapped, spell-checked text in the window.
Yes/No	Use this field type when the only data values appropriate for this field are Yes or No . If appropriate, use the drop-down Default menu to choose an appropriate default value for this field definition.

- Using the **Type** drop-down list, select the type data.

Default

When defining certain field types, for example; *Pos/Neg*, *Yes/No*, *Decimal*, and so on, there may be one of the values which would typically be appropriate over the other. AVImark allows you to enter a default value for these certain data types.

- If appropriate, use the **Default** drop-down list and select a Default value.

Options

This field allows you to choose from 4 options that are specific for Additional Data Fields.

On Patient Chart

This option causes this field to be included on the Patient Chart. For example, you have to set up an Additional Data Field for client information called Spouse phone to be included when printing the Patient Chart.

Searchable

This option causes AVImark to include this field in the system index for clients and patients. If you specify the option of Searchable for any Client Additional Data Field of type *Phrase*, you will be able to locate the client from the CSD by typing some or all of the information in the Client field.

Merge Words

AVImark allows you to insert the value of the Additional Data Field into the text of any MS Word document

simply by using the Additional Data Name Field, enclosed with the Less than (<) and Greater than (>) symbols, as a merge word in the document.

Print if positive

AVImark allows you to print the results of a test showing positive results. The type must be selected as Pos/Neg for this option to work. When results prove positive, the information will print on the Patient Chart. When results prove negative no results will be printed on the Patient Chart.

- If appropriate, click the **Option** which applies to this data field.

Qualifier

This is intended for values which need some unit of measure. For example, miles, days, ml/kg. It can be used to record lab results and other values that need a qualifier after the value itself.

- If appropriate, specify the **Qualifier** for this data field.

Choose from menu

Within *System Tables*, AVImark allows you to create your own tables of information. These tables can be made up on any list of values. When you select *Phrase* in the Additional Data Field *Type* field, you will notice a *Choose from* drop-down menu. This menu will allow you to select the System Table from which you could choose the appropriate information when you start recording data in this field. Specifying the table name here will let you pick from that list when you are actually entering the data. If you click the *Must Choose* box, AVImark will display the System Table's contents as a drop-down menu for you to choose from when you're entering new client data. If you do not click the *Must Choose* box, AVImark gives you the option to either type your own value *or* choose from the table.

- If appropriate, use the **Choose from** drop-down list and select the correct System Table.
- If appropriate, click **Must choose**.
- Click **Done** to record the field definition.

Set Normal Values

AVImark allows you to specify minimum and maximum expected values for any additional data field that is intended for either *integer* or *decimal* values.

- With the correct field selected in the Define More Stuff window, right-click and from the shortcut menu click **Normals** to display the Normal Values window.
- In the Normal Values window, right-click and from the shortcut menu click **New**.

Species

This field allows you to select a specific species, or all species.

- Using the **Species** drop-down list, select the appropriate species.

Min/Max

These fields are used to set the expected normal values for the specified species.

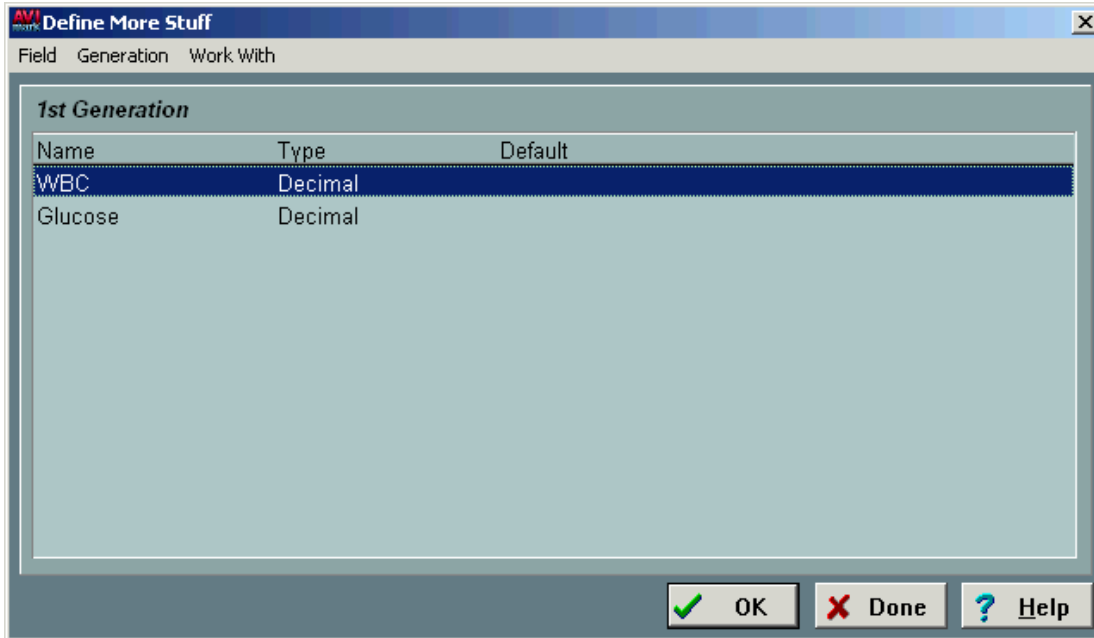
- Enter the **Min** and **Max** expected values.
- Click **OK** to return to the Normal Values window.
- If appropriate, repeat for setting the expected values for other species.
- When finished entering Normal Values, click **OK**.

Define Additional Data Fields for Treatments

As mentioned above, AVImark also lets you specify Additional Data Fields for any treatment in your Treatment List. (AVImark does not support adding additional data fields to inventory items or diagnoses.)

For example, let's say you wanted to keep specific results of lab tests in a certain format. AVImark allows you to add Additional Data Fields to your Blood Profile service(s) to provide a proper framework for later data entry.

- From the Treatment List, select the correct treatment. Right-click and from the shortcut menu click **Change** to display the Change Treatment Window.
- Click **More Stuff** to display the Define More Stuff window.

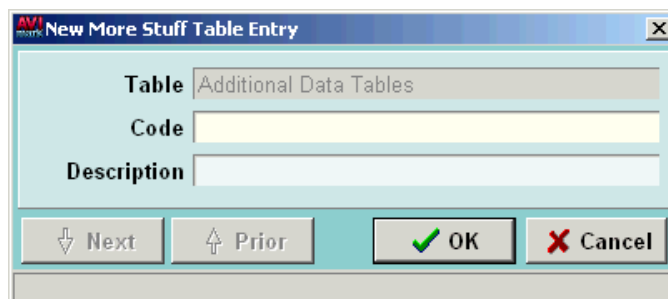


- Define Additional Data Fields for this treatment using the methods discussed in the topic “*Add Data Fields*” on p314 303.

Set up a Data Table

One of the Additional Data Field types is a field type called “Table”. This field type allows you to set up a table of values that can be used as a unique Additional Data Field. The definition of this table of values will be set up in a separate category of System Tables called, Additional Data Tables.

- From the Table section of System Tables, click **Additional Data Tables**.
- Click in the Entries for Additional Data Tables section.
- Right-click and from the shortcut menu, click **New** to display the New More Stuff Table Entry window.



- In the **Code** field, type a Code appropriate for the entry that will be defined.
- Use the TAB key to move to the **Description** field. Type an appropriate Description.

- Click **OK** to display another New More Stuff Table Entry window. You may enter other new entries or click **Cancel** to return to the Additional Data Tables Entries display.
- With the new entry selected right-click and from the shortcut menu click **More Stuff Fields** to display the Define More Stuff window.
- Define Additional Data Fields for the entry using the methods discussed in the topic “*Add Data Fields*” on 314e 303.

Set up the Data Table “field” for clients

With a user-defined data table setup, you are able to set up a new Additional Data Field for Clients which will allow you to enter specific information from the CID.

- From the Table section in System Tables, click **Additional Data Fields**.
- From the Entries for section, click **Clients**. Right-click and from the shortcut menu, click **More Stuff Fields** to display the Define More Stuff window.
- In the Define More Stuff window, right-click and from the shortcut menu, click **New**.
- Type a Name similar to that of the user-defined table which you have set up.
- Use the **Type** drop-down, and select the field type **Table**.
- Use the TAB key to move to the **Choose from** field and select the appropriate table.
- Click **Done** to return to the Define More Stuff window and then click **OK**.

Define Additional Data Fields for SOAP Records

AVImark allows you to create additional data fields for each of the folders in the Medical Condition window. These additional data fields are created in the Additional Data Fields System Table in much the same way as you would create additional data fields for client or patient information.

- On the CID, open the **Work with** menu and click **System Tables** to display the System Tables window.
- Select the **Additional Data Fields** table and then the correct **Entries for** folder.
- Right-click and from the shortcut menu click **More Stuff Fields** to display the Define More Stuff window.
- Add the data fields you would like to create and click **Done**.

Define Additional Data Fields for Whiteboard

Additional Data Fields may be created for the “Checked-in” tab or the “Schedule” tab.

- On the CID, open the **Work with** menu. Click **System Tables**.
- Select the **Additional Data Fields** Table.
- In the Entries for Additional Data Fields section, select the area you wish to create fields for.

Additional Check-in Fields

Selecting this field, you may create Additional Data Fields for the Check-in tab.

Additional Whiteboard Fields

Selecting this field, you may create Additional Data Fields for the Schedule tab.

- Right-click and from the shortcut menu, click **More Stuff Fields** to display the Define More Stuff window.
- Right-click and from the shortcut menu, click **New** to display the Additional Data Field window.
- In the **Name** field, type the description of the field you want to create.
- Using the **Type** drop-down list, select the field type that would be best for data that will be entered into

the field you are creating.

- Click **Done** to add the field. Continue adding the desired Additional Data fields in the same manner, and then click **OK** when you are finished.
- Click **Done** on the System Tables window.

Create New Generations of Definitions

From time to time you may find the need to change the kinds of additional information you want to keep for clients, patients, or for a given treatment. Since there may be many clients for which the original fields of information have already been entered, AVImark **will not** allow you to simply go to the Additional Data Fields Definition Window and add another field definition. AVImark will, however, allow you to define more than one “set” of Additional Data Fields for a given client, patient, or treatment. A new and different definition for the same treatment, client, or patient is called a *New Generation*.

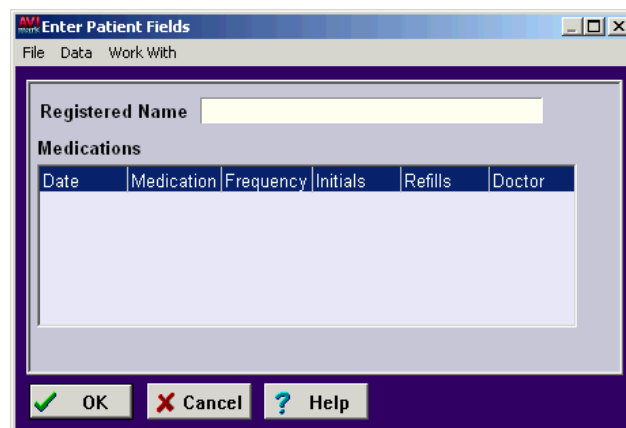
- On the CID, open the **Work with** menu. Click **System Tables** to display the System Tables window.
- From the Table section, click **Additional Data Fields** to display the entries for this table.
- Select the correct Entry for Additional Data Fields. Right-click and from the shortcut menu click **More Stuff Fields** to display the Define More Stuff window.
- On the **Generation** menu, click **New**.
- The original definition fields will automatically copy over to the new generation. Add as many new definitions as you like and/or remove those you wish to leave out.
- Click **OK** to save the new generation.

Enter Information on the CID

Now that you have defined Additional Data Fields, you may enter information into these fields from the CID.

- On the CID, click in the area in which you wish to enter information into an Additional Data Fields window.
- Additional information related to a specific treatment, click on the treatment in the Medical History for the correct patient.
- Right-click and from the shortcut menu, click **More Stuff** to display the specific Additional Data field window.
- If entering data into a “Table” data field, right-click and from the shortcut menu click **New**.
- Enter the appropriate information into each field and click **OK**.

Enter Multiple Entries



AVImark allows you to enter more than one set of information for any client, patient or treatment record. For instance, let's say you are working with a household that is made up of multiple pet owners and you would like to keep the added fields data for the different owners.

The screenshot shows a software window titled "AVImark Enter Table Fields". The window has a menu bar with "File" and "Work With". On the left side, there is a vertical sidebar with buttons labeled "R", "M", and "C". The main content area contains several input fields: "Date" (text box), "Medication" (text box), "Frequency" (text box), "Initials" (text box), "Refills" (text box), and "Doctor" (dropdown menu showing "DLM: Douglas L. McKee, VMD"). At the bottom of the window, there are three buttons: "OK", "Cancel", and "Help".

Multiple data entry for clients

- From the Additional Client Data window, enter the information for one of the clients.
- On the **Data** menu, click **New**.
- Enter the information for the other person and then click **OK**.

Enter Information into the Diagnosis Window

When a data field has been defined as a type of "Diagnosis", you are allowed to choose a diagnosis from the list. When entering a data field of this type and the diagnosis code is known, you may just type the code. When the code is not known, you must select the diagnosis from the list.

- Click in the data field which has been defined as a diagnosis.
- On the **Diagnosis** menu, click **Choose** to display the Diagnosis List Maintenance window.
- Select the correct diagnosis from the list and then click **Done**. Only one diagnosis per field may be selected.

CHAPTER 26: INFORMATION SEARCH

AVImark allows you to locate or target a variety of information in your data including clients, patients, Medical History, and accounting. The data can be sorted, filtered, printed, and exported to a variety of formats. You set the criteria by specifying what type of information you want to look for in the **Look for** column, specifying a **Comparison** test that tells AVImark how to look, and typing certain **Value(s)** that you want AVImark to search for. Selected data may then be viewed, organized, sent to a printer for reports and/or labels, and/or sent to a word processor, and so on. You may also choose to send documents to any client/patient selected by the search.

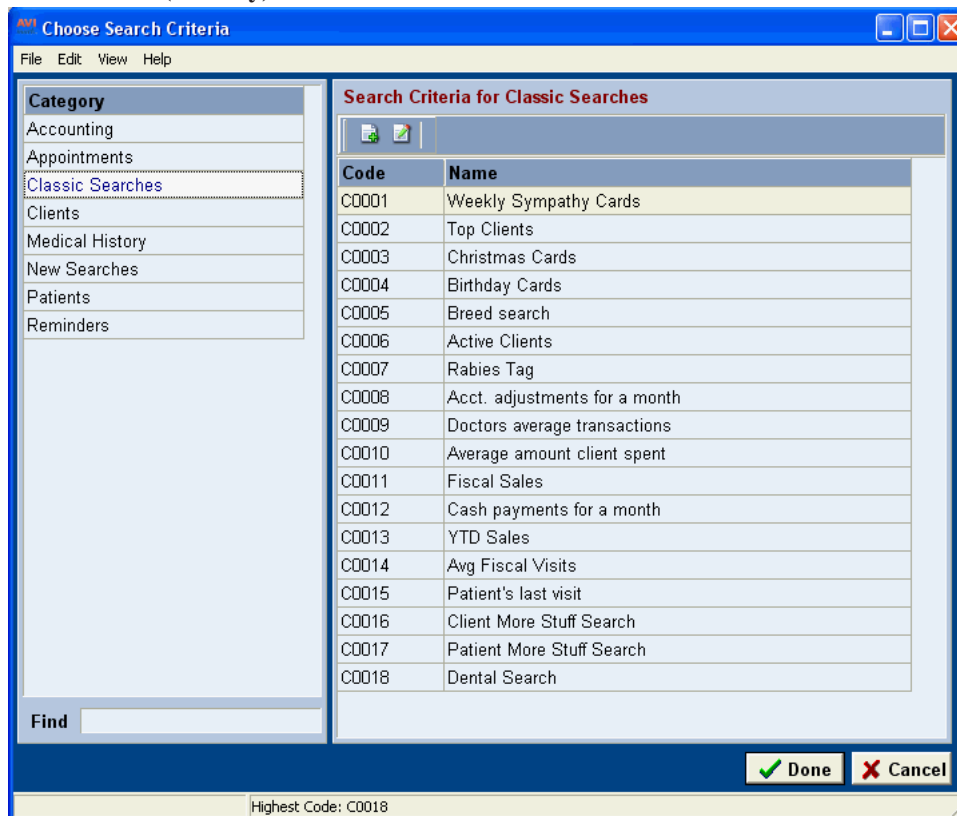
In this chapter you will learn about...

- » Access the Information Search Display on page 323
- » Utilize New Search Criteria Window on page 325
- » Create and Run a Search on page 326
- » Save a New Search on page 331
- » Print and E-mail Results on page 331
- » Create a Sample Search on page 333
- » Print the Criteria on page 334
- » Omit Information on page 335
- » Modify an Existing Search on page 335

Access the Information Search Display

- On the CID, open the **Work with** menu. Click **Information Search** to display the Search library window.

Choose Search Criteria (Library) Window



From the Choose Search Criteria window or library window AVImark allows you to create search categories that can be used to organize searches pertaining to a specific group of clients and/or patients.

File Menu

- Select the **Print** option to print a search category and the criteria for each search
- From the Print window use the **Category** drop-down option to choose the category you want to include on the report. Leave the option set to All Categories to include all categories on the report.
- Check the **Print Criteria** option to include the set up of each search included on the report.
- Under the **Sort By** area select to sort the report by Category and then by Code or Name.
- In the **Print To** field click on the drop-down list to choose a printer.
- Use the **Preview** option to view the report on screen and select **Print** to print the report.
- Click **Done** to close the window.

Edit Menu

- Use the **Undo** and **Redo** options to revert back to changes that have been made.
- Click **Select All** to choose all entries within the category that is currently selected or choose to **Invert the Selection**.

View Menu

- Select **Refresh** to refresh the screen or press F11
- Use the **Columns** feature to customize the displayed columns
- The **Entry History** option will display a history of changes made to the selected entry.
- Select **Show/Hide Preview** to view or hide notes associated with the entries.
- Use the **Show/Hide Group Panel** option to display a panel area allowing you to choose a category you want to organize the entries by.

Help Menu

- Select the **Topic** options to access AVImark's Help file.

Creating a Category

- Under the Category window choose **right-click New** to begin creating a category.
- In the **Category** field enter a descriptive name that will represent searches associated or located in this category.
- Click **OK** to complete the setup.

Assigning a Search Name

Before creating a search or defining the criteria for the search you can assign the search a name and attach notes to the search. However, this can also be done after setting up the search.

- From the Library window under the Search Criteria section choose **right-click New**.
- The **Category** field displays the category this search will be associated with. By choosing another category AVImark will move this search to the selected category after clicking OK.
- In the **Code** field type a code that will represent this search.
- Type a descriptive name for the search in the **Name** field.
- Use the **Text** area to type notes that refer to the search.

- Click **OK** to complete the setup.
- You can then double left-click on this search name to begin defining the criteria.

Utilize New Search Criteria Window

After creating a search or selecting a search you will automatically be taken to the New Search Criteria window.

Menu Options

By utilizing the menu options you can perform many functions.

File Menu

- Selecting **New Criteria** allows you to open and create a new search.
- To work with another search select the **Choose Criteria** option.
- After working with the selected search choose **Save** to save your additions and changes.
- The **Save As New Criteria** saves the search under a new name.
- Select **Remove** to delete the selected search.
- The **Print Criteria** option will print the information search specifications. When the Print window opens click Print to view the setup of the search. This is the information used by AVImark's Technical Support to review the setup of the search.

Edit

- Select **New Condition** to begin creating conditions for the selected search.
- The **Delete Condition** option will delete the condition you have currently highlighted.

View

- **Refresh** will refresh or redisplay the screen.
- Click the **Search** option to run the search and have AVImark display the results.
- The **Code Editor** option allows you to copy and paste search specs.

Results

- Select the **Email** option to send a mass email to your clients found in the search.
- The **Export** option allows you to merge your search results to Excel.
- Selecting **Print** will display the Print Query window again.

Tab Pages

The new search window uses 3 tabs to accomplish setting up the entire search criteria. You will work with all 3 areas to complete setup of each search.

Search Criteria Tab

The information search only requires you specify what information will be used to narrow down your database and you will do this on the Search Criteria tab. You do not mark or select the fields that will be reported in this tab.

Entries setup in the Search Criteria window determines what area of the program information is being pulled from.

- To setup a new search choose **right-click New Condition** to open the New Search Condition window.

Report Criteria Tab

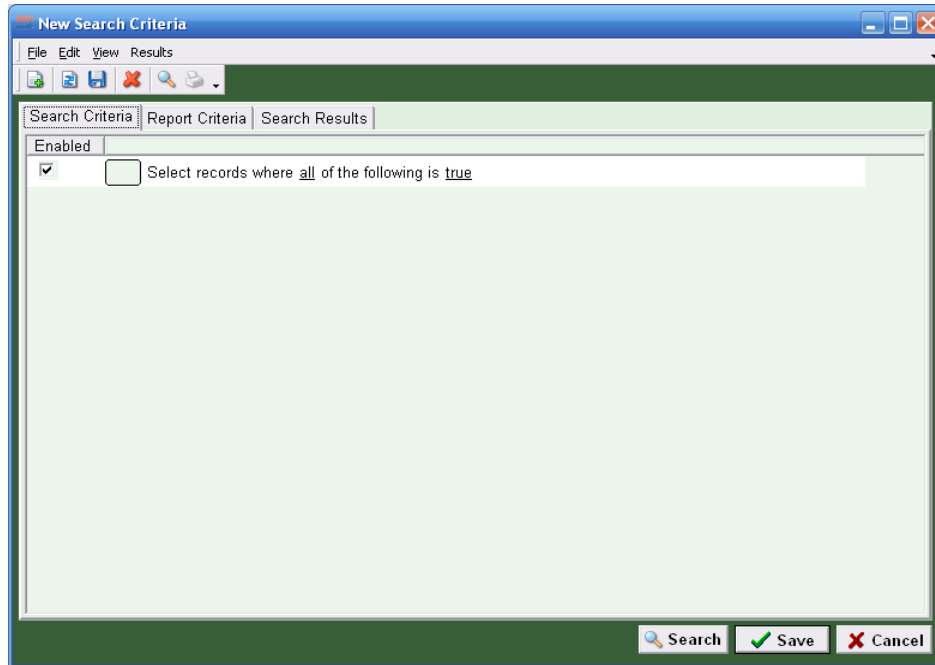
From the Report Criteria tab you will select what information needs to be printed on the report

- Use the **Find** field to select the item in the list you wish to report.

- Double left-click on the entry or use the arrow buttons to move it under the Report Fields area or use the drag and drop function.

Search Results Tab

- To run the search, click the **Search** button at the bottom of any tab. The search results will be displayed in the Search Results tab.



Create and Run a Search

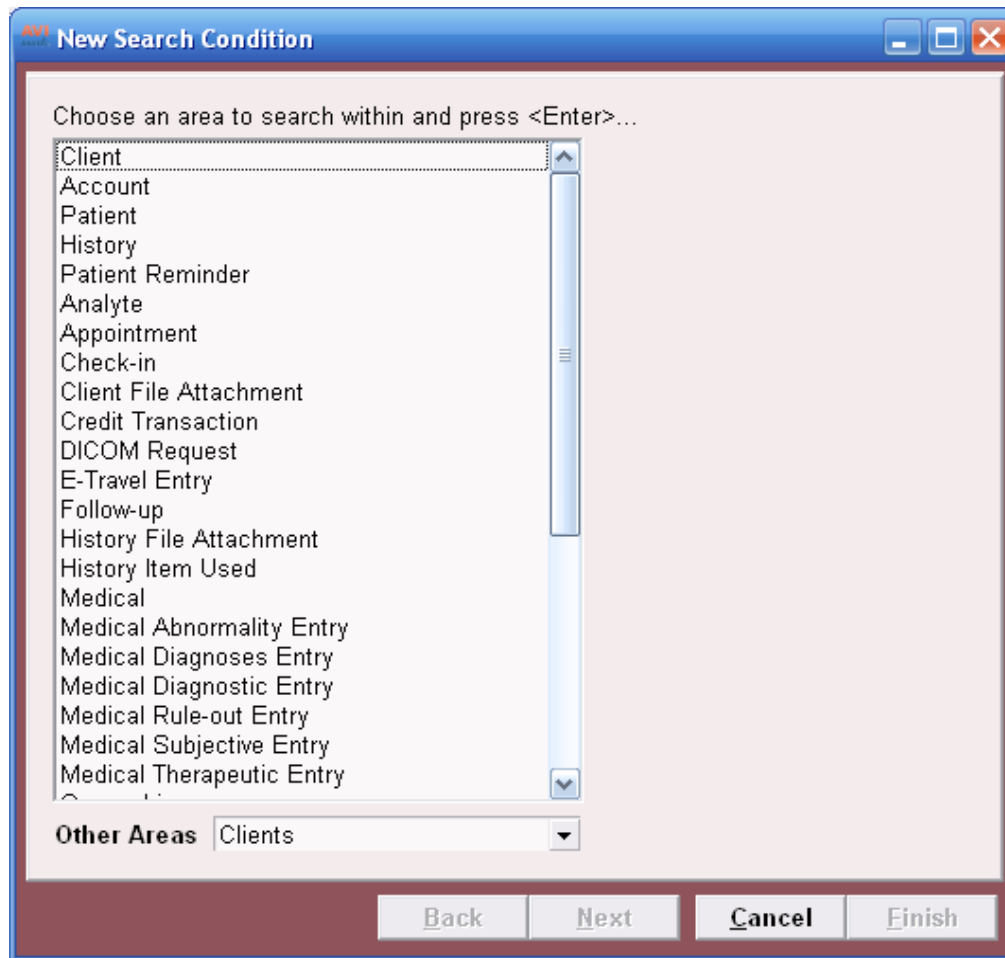
You may add any number of new searches to the Search Library, giving each search a name of your choice.

- On the Search Criteria (Library) window, click **Cancel** to display a New Search window.
- Begin defining the criteria under the Search Criteria tab.

Search Criteria

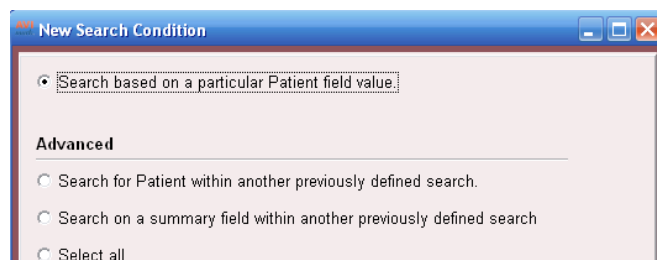
Under the Search Criteria tab you will define the values needed for locating the desired information. Keep in mind you do not need to include all values you want to print on the report only those main values used to find the clients or patients.

- Under the Search Criteria tab select **right-click New Condition** or click the Page like icon to begin defining the values for the search.
- From the scrollable list choose an area you want AVImark to search in (i.e. Clients, Accounting, etc.).
 - To search for a specific field within the client area select **Client**
 - Use the **Account** option to search for a specific field within the Accounting area for a client.
 - To set up criteria searching by patient age, breed, check-in date, etc. select the **Patient** option.
 - The **History** option allows you to search for fields or information within the Medical History area.
 - Use the **Patient Reminder** option to define criteria that will search for patients based on when reminders are due, reminder description, series name, etc.
 - To search for patient test results located in the patient Medical History Analyte window select the **Analyte** option.
 - Select the **Appointment** option and use a number of the criteria options such as when the appointment is due, the appointment type, or if it's an appointment for a new client or patient.



- Restrict the search by searching for **Check-in** information such as In Date, Out Date, Waiting Since Date or Time, Released, Status, etc.
- If using the **Client File Attachment** option you can search for the attachment description, filename, attached notes and other client information.
- To search for credit card information select the **Credit Transaction** option.
- To search for entries that are on the E-Travel Sheet select the **E-Travel Entry** option.
- Search for the patients associated follow-up information by selecting the **Follow-up** option.
- Select the **History File Attachment** option to search for file attachments that are linked to a medical history entry.
- The **History Item Used** option can be used to search for inventory used items in Medical History. From this criteria option you can also search for container and variance information.
- To search for information contained in a Medical Condition Record such as the vitals, notes and More Stuff select the **Medical** option.
- To search for the abnormality information within a SOAP record select the **Medical Abnormality Entry** option.
- Use the **Medical Diagnoses Entry** option to search for the diagnoses information such as code, description and rejected in the SOAP record.
- To search for the diagnostic entry in the SOAP record select the option **Medical Diagnostic Entry**.
- Search for the rule-out entries by selecting the option **Medical Rule-out Entry**.

- Use the **Medical Subjective Entry** option to search for notes or other information contained in the Subjective area of the SOAP record.
 - To search for the quantity or repeat values of therapeutic entries included in SOAP records select the option **Medical Therapeutic Entry**.
 - Select the **Ownership** option to search for split-billing information such as percent, previous owner and the start and end dates.
 - To search for patients by estimates select the **Patient Estimate** option. By selecting this option you can search for active estimates, expiration dates or those that have expired as well as the name and date given.
 - To search for an entry included in an estimate by searching for the Code, Description, Count, Amount and other criteria select the option **Patient Estimate Entry**.
 - To search for the name or description of a file attached to a patient select the option **Patient File Attachment**.
 - Select the **Payment Account** option to search for clients who are on a payment plan. This is for clinics using MPS.
 - Use the option **Problem History** to search for the description, open date and closing date of entry within a patient Problem History.
 - Select the **Recurring Payment** option to search for a client that has been set up on a recurring payment plan. This is for clinics using MPS.
 - Search for a requisition form attached to a patient by using the **Requisition** option.
 - Use the **Requisition Entry** option to search for a specific entry on a Requisition form.
 - If using Sound Technologies and wanting to search for the file or associated entry select the **Sound Image** option.
 - To locate test result information such as instrument name, test date, status and other information located in the Medical History Tests window select the **Test** option.
 - Search for specific information based on a patient's vaccination using the **Vaccine** option.
 - Use the **Whiteboard Activity** option to search for information such as Rate, Completed, User ID and other values for a scheduled entry on the Whiteboard.
 - Search for entries on a Work List by using the **Work List** option.
- By using the **Other Areas** drop-down list you can choose other areas that you would like for AVImark to search in, such as; audit trail entries, block-offs, purchase orders, etc. By selecting another area other fields will be displayed.
 - After choosing an area press **Enter** or click **Next**.
 - Next choose to have AVImark search through all clients or through those that have been included in a search and click **Next**.
 - AVImark defaults to the option **Search based on a particular Client field values**, which is the value you are currently defining for the new search.
 - Under the Advanced area choose to have AVImark **Search for values within another previously defined search**, **Search on a summary field within another previously defined search** or **Select All**.



- Choosing an option under the Advanced tab and selecting **Next** will open another window allowing you to select the search you want to search in and/or the specific field.
- Choose a specific value you want to use to restrict the search and click **Next** to advance to the next screen. It is not necessary to search for all fields you want to include on the report. From this window simply select the main values used to locate the group of clients and/or patients you are searching for.
- In the next screen choose a **Comparison** value by clicking on the drop-down list and then entering the appropriate value in the adjacent field.
- Select **Finish** after defining the appropriate information and the criteria condition will appear under the Search Criteria tab.
- Select **right-click New** to define more values and comparisons for the selected search.
- A checkmark will appear by the criteria you want to use for defining the search.
- You can quickly change a comparison value by clicking on the comparison and selecting a value from the drop-down list.

Creating Sub-Conditions

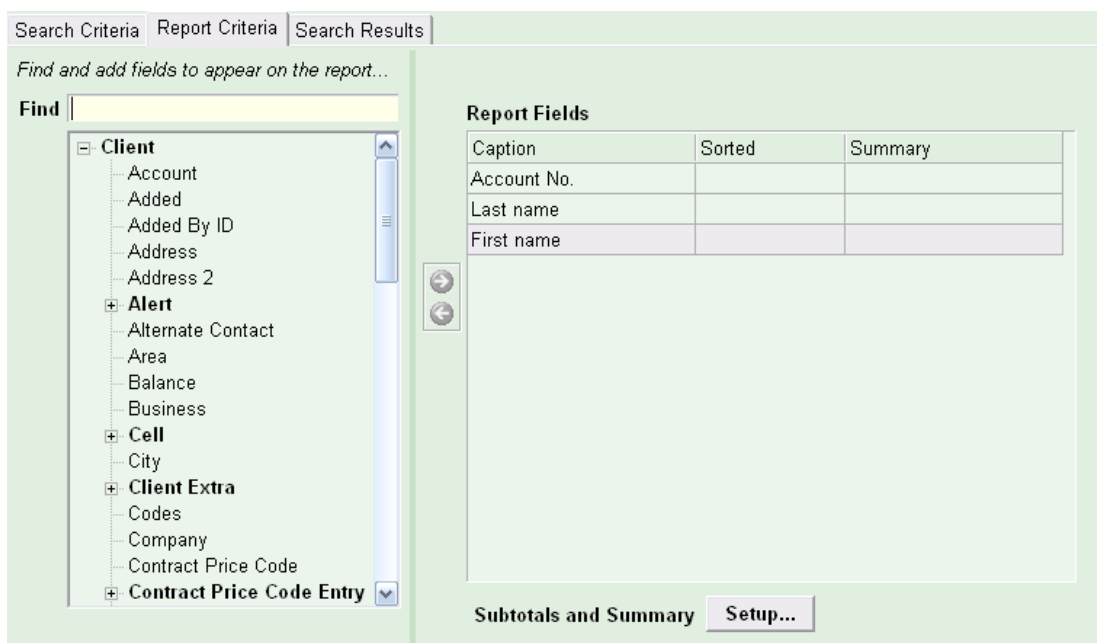
When searching for criteria and defining values where you need to search for either or, you will want to create sub-conditions. For example; when searching for clients that live in a specific area you can have AVImark locate the clients by searching for the city or zip code.

- From the Search Criteria tab select the value line you want to create a sub-condition under.
- From the **right-click** menu select **New Sub-condition**.
- Use the appropriate drop-down arrows to change the value from **all** to **one or more** or from **True** to **False**.

Report Criteria

After defining the search values you will determine what information needs to be included on the report and also how to sort the information.

- Click the **Report Criteria** tab

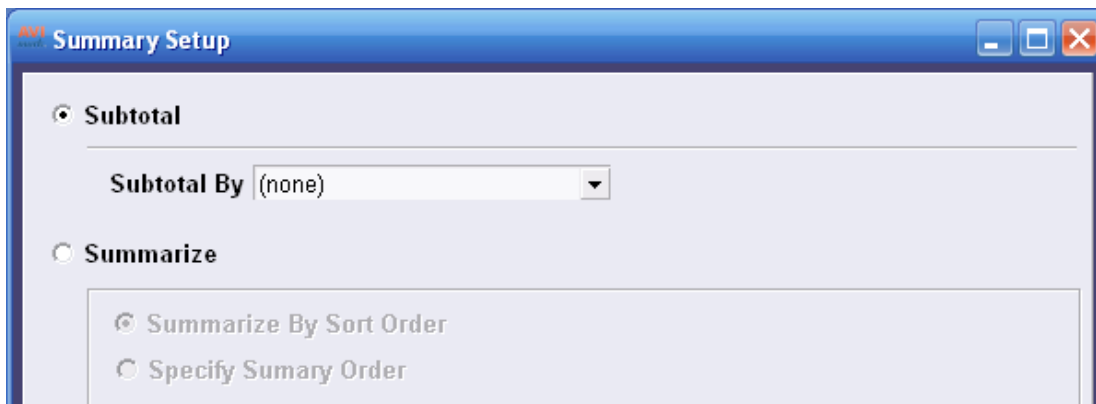


- From the scrollable list on the left choose the field you want to include on the report and click the green arrow pointing to the right or double left-click on the field. Repeat this process until the desired fields or values are selected.
- Use the **Find** field to quickly locate the desired field by typing the name in the field and AVImark will display fields matching the characters typed.
- To determine the report sorting options for a value double left-click on the value under the Report Fields area or select **right-click Change**.
- If appropriate change the title of the column heading in the **Caption** field.
- Use the **Width** field to specify the amount of characters allowed for the width of the column.
- In the first **Sort Order** field specify the sequential number this column will appear in. Click on the sort drop-down list to have AVImark sort the column by Ascending, Descending or leave it unsorted.
- Under the **Summary** area choose the desired summary or count total.
 - Select **Sum** to have AVImark add the values in the associated column.
 - Use the **Count** option to display a total count of the selected criteria.
 - Select **Count Distinct** to prevent duplicates from being added into the total amount.
 - If you want an **Average** of the number found in the associated column select this option.
 - Select the **Min** or **Max** options and AVImark will print the minimum and maximum values for the column on the Subtotal line.
- Click **OK** once all appropriate information has been specified.

Subtotals and Summary Setup

Use the Subtotals and Summary option to customize the information AVImark is subtotaling and summarizing.

- If appropriate from the Report Criteria tab select the Setup option for Subtotals and Summary.



- To subtotal a column you are sorting click on the **Subtotal By** drop-down arrow to select the column you want to use for subtotaling.
- Under **Summarize** check the **Summarize by Sort Oder** option to reflect on how the columns are already sorted. Or to have AVImark sort the column differently or group things together check the **Specify Summary Order** option.

Search Results

After the search criteria has been defined you can then run the search to determine the results.

- From any tab in the Information Search window click the Search button at the bottom of the window.
- The results will be displayed on the Search Results window and the Print Query window will open.

- From the Print window click Print to print the results or click Done to close the Print window and review the results.
- You can open a clients file by double left-click on the appropriate client name.
- After clicking Done on the Print window and reviewing the results simply click the Printer icon or select Results, Print from the menu to reopen the Print window.

	To learn more about: Creating Searches	Search the Help for: Information Search
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Save a New Search

Saving the Search

Once the criteria and report values have been defined it is recommended to save the search.

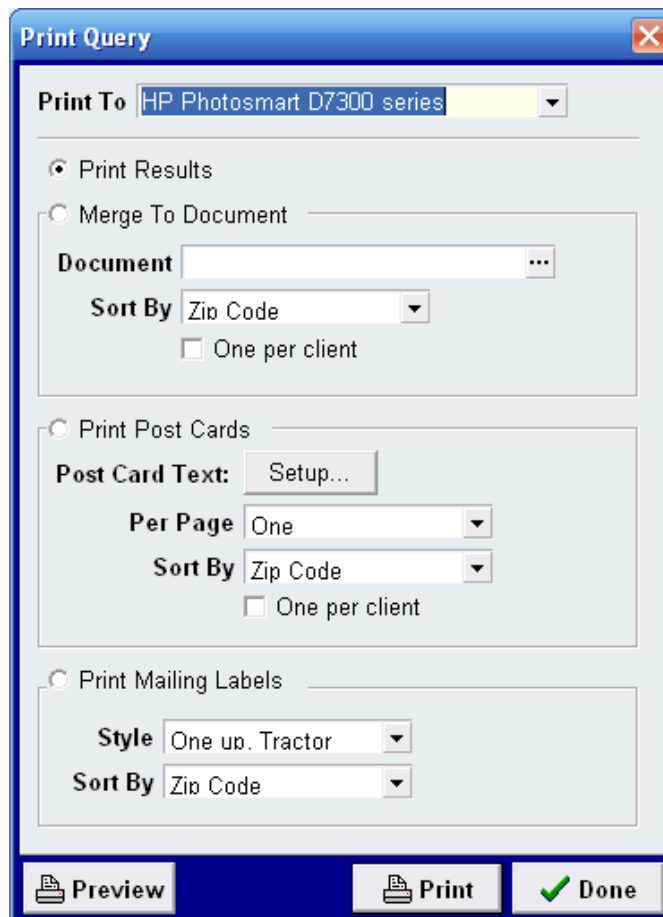
- From the **File** menu select **Save**.
- Choose the **Category** where the search will be contained, enter a **Code** and the search **Name**.
- Click **OK** to save the search.

Print and E-mail Results

Print Query Window

By using the Print Query window you can print results, documents, postcards or mailing labels.

- To open the Print Query window select the **Search** button at the bottom of the Criteria window or from the **Results** menu click **Print**.



Print Results

- Click on the **Print To** drop-down arrow to choose the appropriate printer you are sending the results to.
- AVImark defaults to having the **Print Results** option selected and you will want this checked when printing the search results.
- To view the results and the report layout before printing click the **Preview** button.
- When ready to print the results click the **Print** button.

Merge to Document

To print documents for clients and patients found in the search you will want to use the Merge to Document option.

- In the Print Query window select the **Merge to Document** option.
- From the **Document** field click the search or browse button.
- Locate the document, select it and click Open to display the document name in the Document field.
- Click on the **Sort By** drop-down arrow to choose how you wish to sort the documents.
- If multiple patients belonging to one client are listed in the search results you can print one document for the client instead of for each patient by clicking the **One per client** option.
- Click **Print** when ready to print the documents.

Print Post Cards

After running the search you can also print postcards for the clients found in the search.

- In the Print Query window click on the **Print To** drop-down arrow to select the printer you are sending the postcards to.
- You will then check the **Print Post Cards** option.
- To begin entering the text click the **Post Card Text Setup** option. This will display a note window allowing you to enter the desired text and appropriate merge words. Click **Done** once the text has been entered.
- Use the **Per Page** drop-down arrow to select how many postcards will be printing on one page.
- To sort the postcards by a default sort, Zip Code, Client Name or Account click on the **Sort By** drop-down arrow and select the desired option.
- If the client has multiple pets that were found on the search check the **One Per Client** option to print only one postcard per family.
- Click **Print** when ready to print the postcards.

Print Mailing Labels

If using the Information Search to print letters or documents to the group of clients found in a search you can also print mailing labels for those clients.

- In the Print Query window click on the **Print To** drop-down arrow to select the printer that will be used for printing the mailing labels.
- Click the **Print Mailing Labels** option to define the label settings.
- From the **Style** drop-down arrow choose the style AVImark should print the labels in.
- Click on the **Sort By** drop-down arrow to sort the labels by Zip Code, Client Name, Account or the default sort.
- Click **Print** when ready to begin printing the labels.

E-mailing Results

After running a search you can email the results.

- From the **Results** menu click **E-mail**.
- Select the **Message Text** box to enter the email text in an AVImark Note window. Click **Done** after entering the text.
- To send one e-mail per client check the **One Per Client** checkbox.
- Use the **Attached File** browse button to search for a file you wish to include with the e-mail. This could be a document, photo, pdf, etc.
- Click on the **Reply To** drop-down arrow to select the reply e-mail address, which is found in Hospital Advanced Options.
- When ready to send the e-mails click **Send**.

Exporting Results

The results of an Information Search can be exported to Excel allowing you to change the format and arrange the information and also save the information results.

- After running the search choose **Results, Export** from the menu.
- In the **File Name** field type the name of the file followed by the extension CSV or DBF. You can also click the browse button to search for a file and save the merged file as the selected file.
- Click on the **Merge Format** drop-down arrow to choose the format for the information being exported to Excel.
 - **Standard, consolidated** - The first line of the merge file will contain titles for common client and patient data fields. Then, for each client selected, the merge file will contain this information.
 - **Client information** - This merge file will contain detailed client fields for the clients selected in the search.
 - **Account transaction** - This merge file will contain detailed accounting fields for the accounting information selected in the search.
 - **Patient information** - This merge file will contain detailed patient fields for the patients selected in the search.
 - **Medical history** - This merge file will contain detailed medical history fields for the medical history selected in the search.
 - **Reminder information** - This merge file will contain detailed reminder fields for the reminder information selected in the search.
 - **Custom format** - This will provide up to 20 fields of information in the merge file for those fields you are searching for. These fields may include client, account, patient, and/or medical history data.
- To list the client only once in the exported file select the **One Per Client** option.
- Click **Export** when ready to send the information search results to an Excel format.

Create a Sample Search

For this example we will set up a new search to find all active canines born in the month of June, belonging to owners who have spent greater than \$1000 in the last 12 months with your hospital.

- From the CID access the **Work with** menu and choose **Information Search** to display the Choose Search Criteria window.
- At this time you can define a search name and click **Done** or press **Cancel** to set up the search first.

Search Criteria

- Under the Search Criteria tab select **right-click New Condition**.

- From the Area scrollable list select **Client** and click **Next**.
- Leave the default option **Search based on a particular Client field** value selected and click **Next**.
- Choose **Fiscal Sales** from the field list and click **Next**.
- From the Comparison drop-down list select **is greater than** and in the value field enter \$1000 and click **Finish**.
- Choose **right-click New Condition** to define the patient values.
- From the area scrollable list select **Patient** and click **Next**.
- Leave the default option **Search based on a particular Patient field** value selected and click **Next**.
- Select the **Birthdate** field and click **Next**.
- Use the **Comparison** drop-down list to choose the appropriate value and for our example we will choose equals and tab to the next field and type Jun or 06.
- Click on the **Date Calculation** drop-down list and select **Month of**.
- Select **Finish** after defining the criteria for this value.
- Choose **right-click New Condition**.
- Choose the **Patient** area and click **Next**.
- Leave the default option selected and click **Next**.
- In the **Find** field type **Species Name**, click the plus symbol next to Species Entry and select **Species Name**. Click **Next** to continue.
- Use the **Comparison** equals and type **Canine** in the value field. Click **Finish** to complete the setup.

Report Criteria

After defining the criteria for the search you will then specify the information to be included on the report.

- Select the **Report Criteria** tab to define the report values.
- Use the **Find** field or scroll through the list to find the field you wish to report.
- After selecting the field, click the right green arrow or double left-click on the field to place it under the Report Fields area.
- Change the order or placement of the field by selecting **right-click Change**.

Run the Search

- Click the **Search** button to display the results on the Search Results tab.
- You can then choose to print the results.

Saving the Search

Once the criteria and report values have been defined it is recommended to save the search.

- From the **File** menu select **Save**.
- Choose the **Category** where the search will be contained, enter a **Code** and the search **Name**.
- Click **OK** to save the search.

Print the Criteria

There may be an instance where you need to print the criteria for a search and this can be easily done.

- In the Search Criteria window select **File, Print Criteria** from the menu
- **Click** on the **Print To** drop-down list to select the desired printer.

- Use the **Preview** button to view the search specifications directly on the screen.
- When ready to print the criteria setup select **Print**.

Omit Information

With the new design of the Information Search feature AVImark provides a much more controllable and flexible way of omitting information from searches. The idea is to create two searches minimizing the detailed setup of one search and allowing you to use the searches within other searches.

- You will first create the main search. For example, look for all patients who have received a Heartworm treatment.
- Next you will create a second search that will locate patients that have not received a Heartworm.
 - From the **Search Criteria** tab define a **Patient** value and choose the Advanced option **Search for Patient within another previously defined search**.
 - From the next screen set the value to **Does Not Exist in** and click on the second drop-down list to choose the appropriate search, for example Patients with Heartworm.
- Run the search and AVImark will omit patients that have received a heartworm treatment and will display only patients meeting the set criteria that have not received a heartworm treatment.

Modify an Existing Search

AVImark allows you to modify the search criteria of an existing search.

- From the Choose Search Criteria (Library) window, select the search you wish to modify and click **Done** or **double left-click** to display the Information Search criteria for the selected search.
- Modify the search criteria as desired and from the **File** menu click **Save** to save the new modifications.
- To save the modified search and give a new name, open the **File** menu and click **Save As** to display the Change Information Search window.
- Type the name you wish to assign the modified search and click **Done**.



To learn more about:
Using the Last Search option

Search the Help for:
Information Search

CHAPTER 27: FOLLOW-UP LIST

The AVImark Follow-up List is a list of patients who need to be called back after a short period of time for one reason or another. Follow-ups which become past due will be displayed in red in both the patient's Follow-ups Folder tab and the Follow-up List. Follow-ups for checked-in patients will be displayed in blue and future follow-ups appear in black.

In this chapter you will learn about...

- » Create a Follow-up from the CID on page 337
- » Create an Automatic Follow-up on page 338
- » Work with the Follow-up List on page 338
- » Use the Follow-up List Shortcut Menu on page 339
- » Print the Follow-up List Report on page 340

Create a Follow-up from the CID

AVImark allows you to create a follow-up for a patient from the CID.

- Ensure the correct patient is selected.
- From the Patient area, select the **Follow-ups** tab.
- Right-click and from the shortcut menu click **New** to display the New Follow-up window.

- Type the **Subject** of the follow-up.
- Use the **Doctor** drop-down list and select the appropriate doctor related to the follow-up.
- Select the **Critical** box if the callback is considered serious or life-threatening.
- From the **Due date** field, use the drop-down calendar to specify the date the callback should be made, or TAB to the next field and type the number of days from the current date the call should be made.
- Use the **Repeat** fields to specify when the follow-up should be repeated and for how many times, if applicable.

- Type any comments pertaining to the Follow-up and click **Done**.

Create an Automatic Follow-up

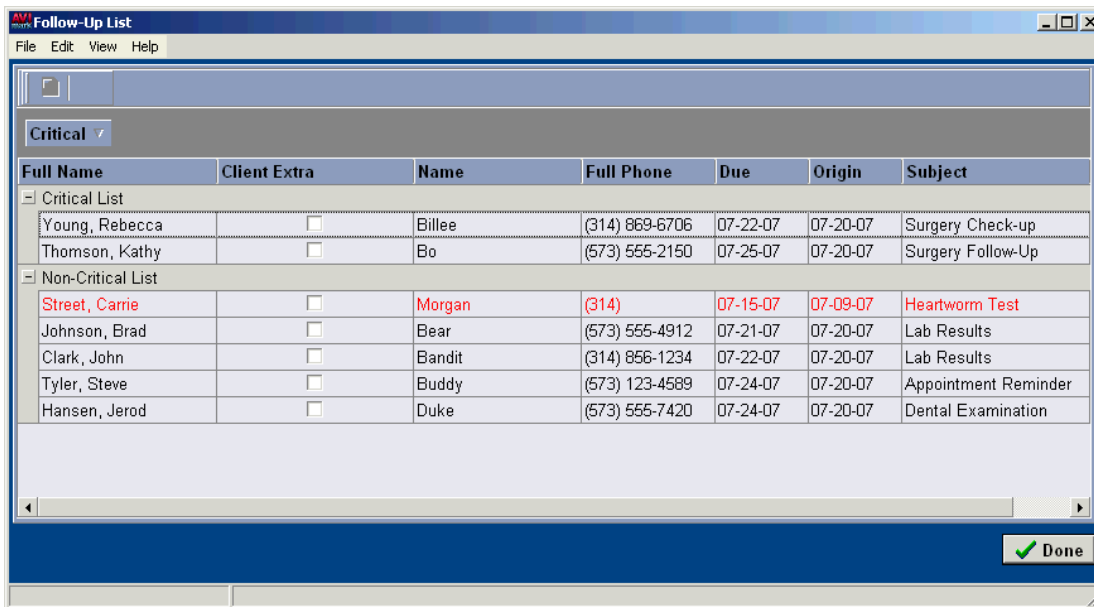
AVImark also lets you set up a more automatic way of following up with certain patients relating to the services they have received. You may specify a Follow-up callback for any treatment, item or diagnosis in your Treatment, Inventory or Diagnosis List.

- From your Treatment, Inventory or Diagnosis List select the service you wish to link a Follow-up to.
- Right-click and from the shortcut menu click **Change** to display the Change window.
- From the **Treatment Change** window click on the **Treatment** Tab. In the **Inventory Change** window click on the **Advanced** tab. From the **Diagnosis Change** window click on the **Diagnosis** tab.
- From the **Follow-up in** field, specify the number of days the patient is to be contacted once the service is entered into Medical History.
- If appropriate, select the **Critical?** box.
- Click **Done** to save your changes.

Work with the Follow-up List

The Follow-up List will be displayed in a tree-format based on the status of the Follow-up. The Follow-up List may be added to, modified, or removed at your discretion.

- On the CID, open the **Work with** menu and click **Follow-up List** to display the Follow-up List.



Change the width of columns

You may change the column width as you wish.

- Change the columns by holding the left mouse button on the gray line which separates each column title and move either left or right.

Change a Follow-up callback

- With the correct follow-up selected, right-click and from the shortcut menu click **Change** to display the Change Follow-up window.
- Enter the appropriate changes and/or mark the callback as Confirmed or Left message by selecting the appropriate option from the drop-down list.

- Click **Done**.
- Post Follow-up comments**

AVImark lets you save comments in the Medical History area of the patient for future reference.

- From the Follow-up List, select the correct follow-up. Right-click and from the shortcut menu click **Post**.

Remove a Follow-up

You may remove a follow-up once it has been made.

- From the Follow-up List, select the correct follow-up. Right-click and from the shortcut menu click **Remove**.

Go to the CID for the selected patient

You may go to the CID for any patient from the Follow-up List.

- From the Follow-up List, select the correct follow-up. Right-click and from the shortcut menu click **Go to Patient** to display the CID for that patient.

Use the Follow-up List Shortcut Menu

Within the Follow-up List window there are other features found in the shortcut menu. Click the right mouse button to see the shortcut menu.

Edit Changes

Use the Edit menu to select follow-up entries or to undo or redo changes to an entry.

	<p>To learn more about: Removing Multiple Follow-ups</p>	<p>Search the Help for: Remove follow ups</p>
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View

From the View shortcut menu you can Refresh the window, customize columns, view the Entry History for this follow-up, Preview or Hide text associated with the follow-up or you can choose how to sort the window.

Entry History

Use this option to view a history of changes made to the select follow-up.

- Select an entry and choose right-click **View, Entry History**.
- View date and time the change was made, the logged in user who made the change and a description of the change that was made.
- Click **Done** to close the window.

Go To Patient

Use this menu to have AVImark automatically access this patient’s file on the CID.

- With the appropriate follow-up selected, from the right-click shortcut menu select **Go to Patient**.
- AVImark will close the Follow-up list with the selected patient’s file open on the CID screen.

Enter follow-up notes

You may enter notes regarding a specific follow-up entry using all of the available AVImark note feature options. When the follow-up is posted the notes will be posted to the patient’s medical history.

- With the correct entry selected, right-click and from the shortcut menu click **Notes** to display the Notes window.
- Type the appropriate notes for this entry. All of the AVImark notes feature options are available in this

Follow-up List

window.

- Click **Done** to save the notes.

Post

Once a follow-up has been performed it can then be posted, which will remove it from the follow-up list but mark it as complete.

- From the Follow-up List, select the appropriate follow-up and from the right-click shortcut menu click **Post**.
- The follow-up will automatically be removed from the list.

Print

From the Follow-up list a specific document can be printed as well as the entire follow-up list.

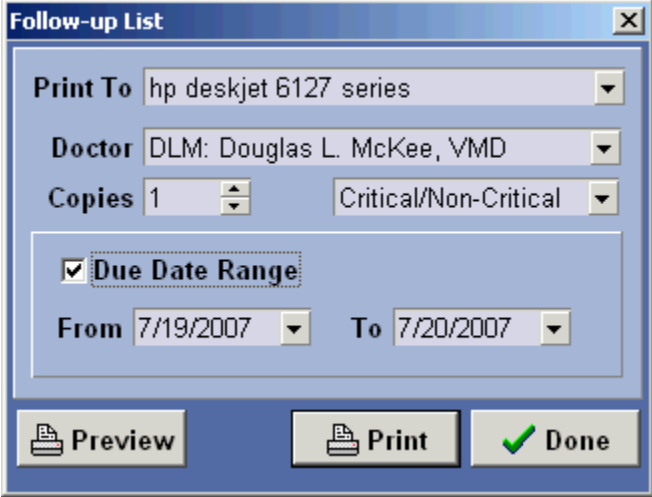
- Within the Follow-Up List window select right-click **Print**.
- Choose **Document** to print a specific MS Word document.
- Choose **Report** to print out the entire list of follow-ups or print only critical or non-critical.

Print the Follow-up List Report

You may wish to print either the list itself or print documents to the clients on the list.

Print the Follow-up List

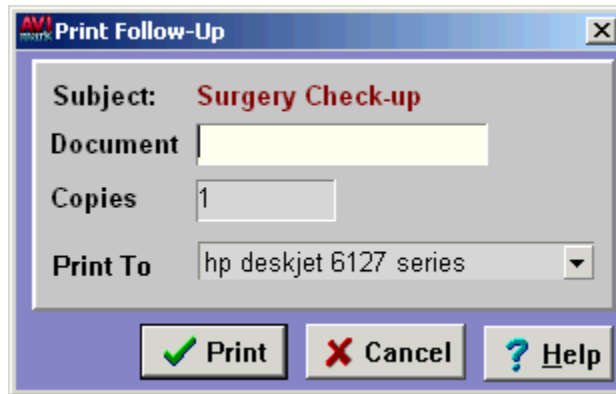
- From the Follow-up List, open the **Print** menu and click **Report** to display the Print Follow-up Report window.




- Use the **Print to** drop-down list to specify the correct Printer.
- If appropriate, use the **Doctor** drop-down list to specify a specific doctor.
- Type the number of copies to print.
- Use the drop-down list to select the list you wish to print;
 - Critical/Non-Critical
 - Critical
 - Non-Critical
- If appropriate, use the **From** and **To** drop-down calendar and select a date range.
- Click **Print** or to view the report onscreen, select **Preview** and click **Print**.

Print a document for a selected client

- From the Follow-up List, open the **Print** menu and click **Document** to display the Print Follow-up window.



- Double-click in the **Document** field to display the Open window.
- On the Open window, double-click on the correct document.
- Specify the number of copies to print and use the **Print to** drop-down list to select the correct printer.
- Click **Print**.

	To learn more about:	Search the Help for:
	Follow-up List	Follow-ups
	Follow-up List Color Key	Viewing Follow-up List
	Save/E-mail Follow-up List Report	Saving Reports; E-mailing Reports

CHAPTER 28: BACKING UP & RESTORING

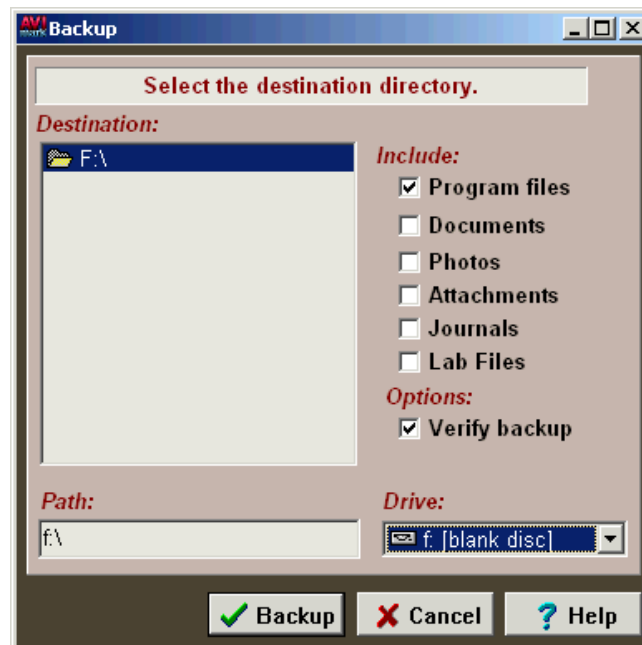
Why back up at all? Simply put, you can't recover lost or corrupt data files from nothing. Backing up is the activity of copying files so that they will be preserved in case of equipment failure or other catastrophe, and should be made routine with the daily operations of the hospital. When backing up your data we do not recommend that you use "scheduled back-ups", or "tape" backup devices. Our experience from restoring data from old tapes (as part of the data conversion process) is that 10% of the tapes we receive are unreadable. In addition to AVImark providing a means of backing up your data, AVImark also provides the ability of retrieving files that you backed up called "restore". Restore is a process that involves copying backup files from secondary storage (tape, Zip disk, CD or other backup media) to hard disk. A restore is performed in order to return data to its original condition if files have become damaged or lost.

In this chapter you will learn about...

- » Making a Back-up on page 343
- » Format Zip Disks/CDRW's on page 344
- » Restoring Data on page 344

Making a Back-up

- Ensure you have labeled the media for the correct day of the week.
- Insert the selected media into the correct drive.
- On the CID, open the **Utilities** menu. Click **Back Up AVImark files** to display the Backup window.
- Click **Yes** to confirm that all other users have exited AVImark.



Drive

The Drive menu indicates the drive you are backing up to. This drive letter should also be displayed in the Destination and Path windows.

- If necessary, use the Drive drop-down list to select the correct drive.

Destination

The Destination window will display the drive and/or directory you are backing up to. If the incorrect drive is specified, you will need to select the correct drive from the Drive menu.

Verify Back-up

AVImark lets you verify the data that is copied on the specified back-up media is exactly the same as the data that is on your hard disk.

- Select **Verify back-up**.

Include

AVImark allows you to choose what will be backed up. If nothing is selected under “Include”, the only thing backed-up will be the AVImark data files. Selecting “Program Files” will back-up the AVImark data files as well as any necessary files AVImark needs to run.

- Select the applicable options to have included in the back-up and click **Backup**.

Format Zip Disks/CDRW's

Zip Disks

Most Zip Disks you buy these days are “pre-formatted” for use and will not need formatting right away. It is strongly suggested that you replace or at least format your backup disks every six months. Understand that formatting a disk completely erases the disk, so make sure you are not formatting a disk that contains something you will need later.

- Exit all programs which you might be working in and insert the disk into the Zip drive.
- On the **Windows Desktop**, double-click **My Computer** to display the My Computer window.



If the My Computer icon is not displayed on the Windows® desktop, you can access it through the Start menu.

- Point to the **Zip Drive**. Right-click and from the shortcut menu, click **Format** to display the Formatting window.
- Change any parameters which may be necessary.



You may not want to choose the long/full format type. Choosing the short/quick format options will NOT check the disk for any damage.

- Click **Start** to begin Formatting.
- When finished formatting, close the Format window. If Windows indicates that the disk has been damaged, it is recommended to just discard the disk.

CDRW

When using a CD burner, the disks MUST be formatted with the ability to drag-and-drop files like any other drive on the computer. Roxio®'s Drag-to-Disc or Direct-CD software works very well when formatting disks.

Restoring Data

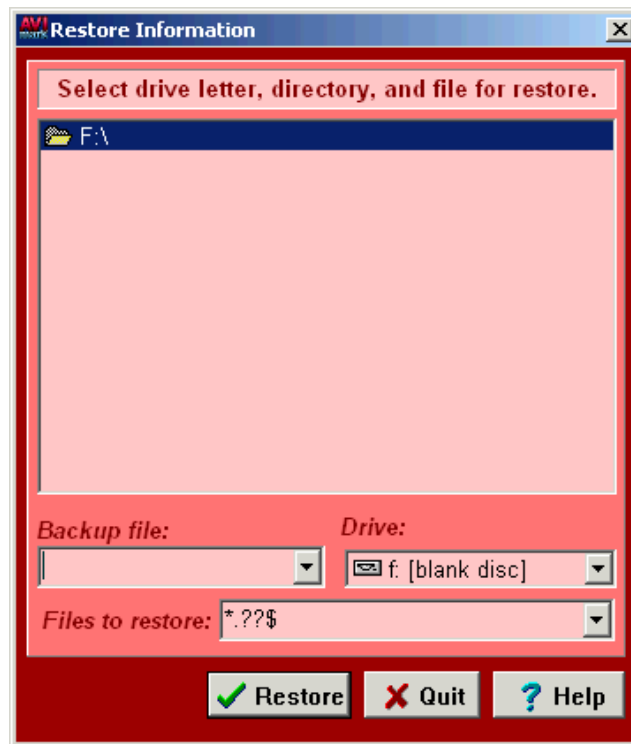
The purpose of this AVImark function is to allow you to restore information which had previously been saved from a back-up. If you have some sort of catastrophe with your hardware (the computer), or perhaps realize that you have entered a considerable amount of data in the wrong way or on the wrong computer, you may need to restore your data from backup diskettes. In the latter case, you probably won't have much of an option. In the former, it may be easier to just restore data from a backup disk than try to sort it out. You do need to realize that this will only allow you to restore information up through the last day's backup disk, so you would need to

reclaim any information that was put in the computer after the backup was made.



CALL AVIMARK’S TECHNICAL SUPPORT DEPARTMENT PRIOR TO RESTORING!

- With the exception of the file server, ensure that all other workstations have exited AVImark prior to starting the process.
- Insert the back-up disk which you plan to restore from.
- On the CID, open the **Utilities** menu. Click **Restore from back-up** to display the Restore window.
- If you are absolutely certain this is the appropriate thing to do, click **Yes** on the confirmation window.



Drive

This field will display the drive from which you will restore from.

- If necessary, use the **Drive** drop-down list to select the correct drive to restore from.

Back-up file

This field will display the Back-up Zip file from which you will restore from.

- If necessary, use the **Back-up file** drop-down list to select the correct Zip file.



CALL AVIMARK’S TECHNICAL SUPPORT DEPARTMENT PRIOR TO RESTORING!

- Click **Restore** to proceed. When the process is finished, click **OK**. AVImark will close and you will be returned to the Windows Desktop.

Restore from Diskettes

- With the exception of the file server, ensure that all other workstations have exited AVImark prior to starting the process.
- Insert the last Back-up Diskette of the daily back-up set.
- On the CID, open the **Utilities** menu. Click **Restore from back-up** to display the Restore window.
- If you are absolutely certain this is the appropriate thing to do, click **Yes** on the confirmation window.
- If necessary, use the **Drive** drop-down list to select the correct drive to restore from.
- Click **Restore** to proceed. You will be prompted to insert disk number one of the spanned disk set. Insert disk one and click **OK**.
- Once the information has been unzipped from the first diskette, you will be prompted to insert disk number two. Insert disk number two and click **OK**.
- When the process is finished, click **OK**. AVImark will close and you will be returned to the Windows Desktop.

Restore Individual Files

- With the exception of the file server, ensure that all other workstations have exited AVImark prior to starting the process.
- Insert the back-up disk which you plan to restore from.
- On the CID, open the **Utilities** menu. Click **Restore from back-up** to display the Restore window.
- If you are absolutely certain this is the appropriate thing to do, click **Yes** on the confirmation window.
- If necessary, use the **Drive** drop-down list to select the correct drive to restore from.
- If necessary, use the **Back-up file** drop-down list to select the correct Zip file.
- Using the **Files to restore** field, type the specific file names you wish to restore. Separate each file name with a space.
- Click **Restore** to proceed. When the process is finished, click **OK**. AVImark will close and you will be returned to the Windows Desktop.



To learn more about:

Backing up your data
Restoring your data

Search the Help for:

Table of Contents – Backing Up
Restoring

CHAPTER 29: AVIMARK SIDEKICK

With AVImark installed on a laptop computer, AVImark gives you the ability to use the Sidekick feature. This will allow you to use the laptop in the field in the same manner as you would in the hospital. Data added to the laptop can be merged into existing data on the hospital system over your hospital's local area network. In order to use AVImark Sidekick, it is necessary that you have a network installed on your hospital's computer(s) and that the laptop you use in the field can be connected as a workstation on the network.

In this chapter you will learn about...

- » Installing AVImark on the Laptop on page 347
- » Importing Data on page 347
- » Refreshing Data Files on the Laptop on page 348

Installing AVImark on the Laptop

Before using Sidekick, it is necessary to have AVImark installed on the laptop. You may do this by logging the laptop onto the hospital network and then copy the entire AVImark directory from the hospital server computer onto the root of the C: drive of the laptop. It is recommended that you contact **AVImark's Technical Support** at 1-877-838-9273 for assistance with installing AVImark.



It is important that you DO NOT mark the drive on the Sidekick computer (the drive on which AVImark is installed) as "Read Only". In addition, either the drive or the AVImark folder on the laptop must be fully shared.

- With AVImark installed and a shortcut created on the desktop, disconnect the laptop from the hospital network. (To avoid possible confusion, rename the desktop shortcut to **SIDEKICK**).
- Run AVImark on the laptop (disconnected from the hospital network).
- On the CID, open the **Work with** menu. Click **Hospital Setup** and select the **Miscellaneous** tab.
- From the **Other Options** section, select the **AVImark Sidekick** option and click **Done**.

Importing Data

Once you have finished using AVImark in the field, you are now ready to import the information you have added and/or changed on the laptop into the hospital computer.

- Log the laptop onto the hospital network.
- Ensure AVImark is closed on the laptop and then go to the hospital server computer.



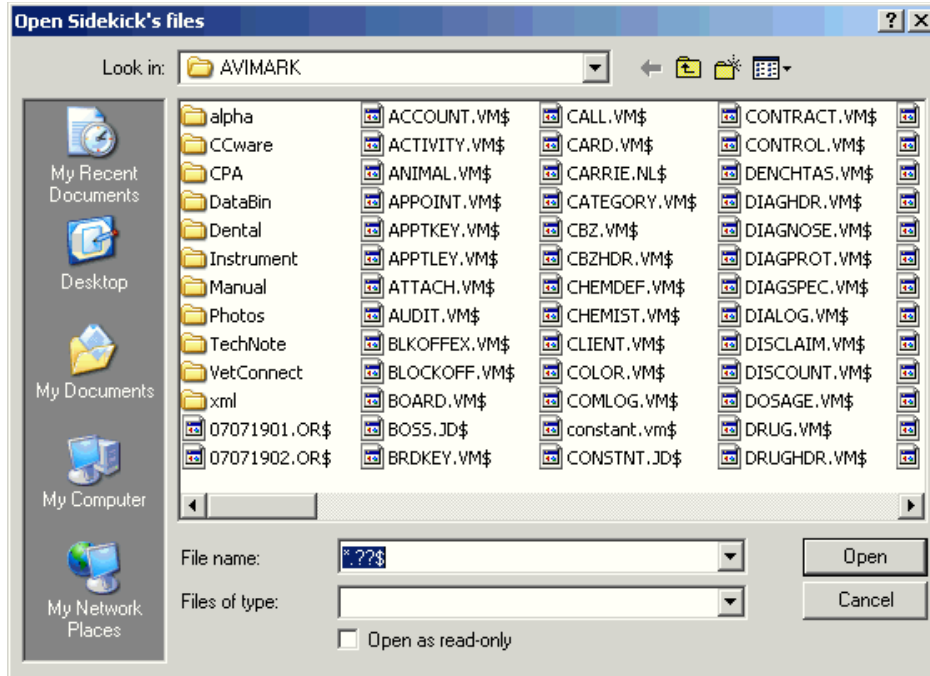
To learn more about:

Minimum Laptop Requirements


Search the Help for:

Sidekick; Setting up Sidekick


- On the CID, open the **Utilities** menu. Click **Sidekick** to display the Sidekick Import window.
- If the correct location of AVImark on the laptop is not specified correctly in the **Import from** window, click **Browse** to display the Open Sidekick's files window.



- Using the **Look for** drop-down, select **Network** to display a list of all computers currently logged onto the network.
- Double-click the **name** of the laptop computer to display a list of drives available on the laptop.
- Double-click the **Drive** where AVImark is installed on the laptop to display a list of folders (directories) on the selected drive.
- Double-click the **AVImark** folder and click **Open** to return to the Sidekick Import window. A list of all transactions/information to be imported into the hospital system will be displayed.
- Click **Next** to display the Import Sidekick's Records window.

 *It is recommended you leave the "Create backup of main system" box checked. With this checked, AVImark will automatically take a backup of the hospital system data before the Sidekick data is imported. If you decide to leave this checked, you will need to ensure no other computer on the network (including the Sidekick) is running AVImark.*

- Click **Import** and click **Yes** to confirm.
- Click **OK**. A list of data records that were imported from Sidekick will be displayed.

	To learn more about:	Search the Help for:
	The Data that will Import from Sidekick	Sidekick Overview

Refreshing Data Files on the Laptop

Once you have imported the information from the Sidekick computer into the hospital data files, you now have the option to refresh the Sidekick. During this process, AVImark copies all of the data files from the hospital system to the Sidekick computer. In addition, you have the option to have AVImark automatically make a backup of the data on the Sidekick computer prior to refreshing.

- Ensure AVImark is not running on the laptop computer.
- Click **Refresh** and click **Yes** to confirm.

CHAPTER 30: NOTE GLOSSARY AND Q & A

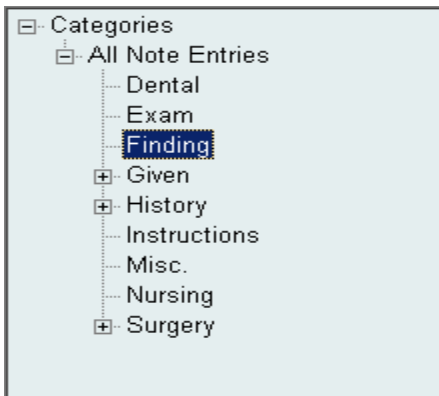
The Note Glossary feature allows you to create and store note templates. Note templates help automate the entire process of producing accurate and consistent notes for your clients, patients and medical history. The Question and Answer feature is unique in that it can be used in many different ways. It is more commonly used for a Q & A format for frequently asked questions. The Q & A provides listed categories with questions for each category.

In this chapter you will learn about...

- » Accessing and Setting-up Glossary Categories on page 349
- » Edit a Glossary Category on page 350
- » Create a Note Template on page 350
- » Add Another Similar Template on page 351
- » Move Note Templates to Other Categories on page 351
- » Create Note Templates from a Note Window on page 351
- » Print Note Templates on page 352
- » View Notes Attached to Glossary Entries on page 352
- » Refresh the Note Glossary Window on page 352
- » Undo and Redo Changes on page 352
- » View History of Entries on page 352
- » Create Notes on page 352
- » Use Note Templates on page 352
- » Copy and Paste Note Templates on page 353
- » Importing Files on page 353
- » Printing from the Note Window on page 353
- » Accessing and Create Categories for Q & A on page 353
- » Enter a Question on page 354
- » Entering an Answer on page 354

Accessing and Setting-up Glossary Categories

The Note Glossary is designed similar to the Treatment and Inventory Lists, in that you can create categories to organize your note templates. In addition, you can create a “tree structure” where you have multiple levels of template categories displayed in outline form. Expand and Collapse buttons, indicated by a minus sign or plus sign, appear next to categories that contain sub-categories.



- On the CID, open the **Work with** menu. Click **Glossary** to display the Glossary window.
- In the Categories section, right-click and from the shortcut menu click **New** to display the New Glossary Category window.

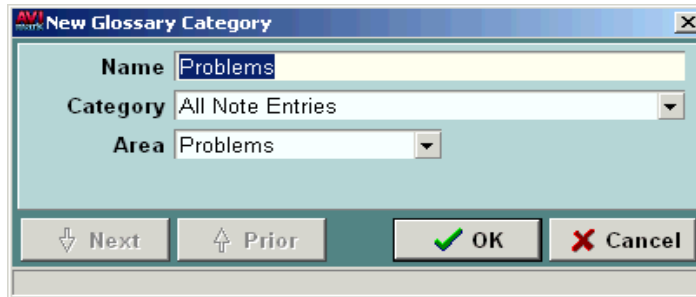
Name

This is the descriptive name assigned to each category.

- Type a Category Description.

Category

The Category field allows you to enter the new category as a new/parent category or a sub-category of an already existing category. When entering as a new parent category, this field should be set to **(none)**.



- If appropriate, use the **Category** drop-down list to select a category.

Area

This field allows you to assign an area that the new category will be associated with.

- If appropriate, use the **Area** drop-down list to select an associated area.
- Click **OK**.

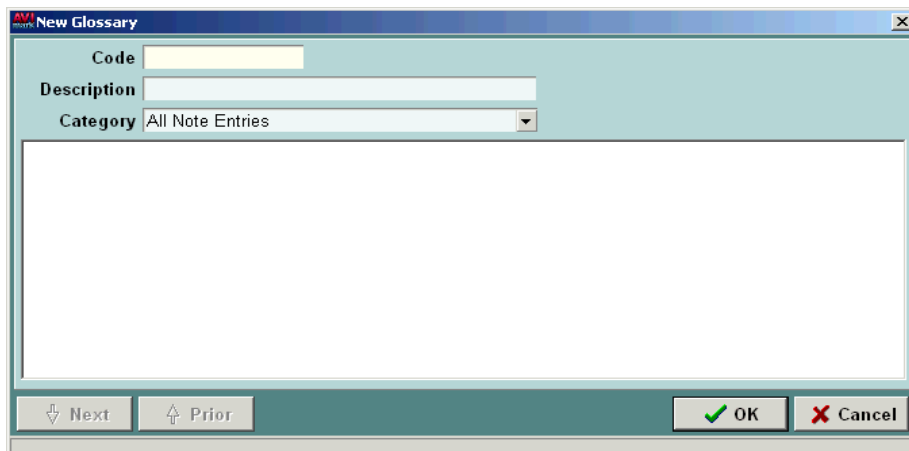
Edit a Glossary Category

- Select the Category name you wish to change. Right-click and from the shortcut menu click **Change** to display the Change Glossary Category window.
- After the change has been made, click **Next** and/or **Prior** to move through the list of categories or click **OK** when finished.

Create a Note Template

You may create note templates from the Note Glossary or from any Note window in AVImark.

- Select the category you wish to create a template for.
- Point in the **Records** for section. Right-click and from the shortcut menu click **New** to display the New Glossary window.



Code

This is the code that will identify the template. In addition, from any AVImark notes window you may enter the template code and then press SHIFT + SPACE to “auto-import” the note template into the note window.

- Type the Code for the template.

Description

This is the descriptive name assigned to the note template.

- Type the template Description.

Category

This field allows you to move the template from the assigned category to a different category.

- If appropriate, use the **Category** drop-down list to select a different category.

Note section

AVImark allows you to customize the note to a particular patient and or client by the use of Merge Words. Within any note window you may also use the caret symbol (^) to quickly add information in certain locations of the template. When the template is imported to a note window, use the F12 key to skip to each location of the caret symbol to enter the appropriate information. You may also use the right-click options in the Note section.

- Type the notes for the template and click **OK**.
- After clicking OK, a New Glossary window will continue to appear. This will allow you to create additional templates under the selected category. When you are finished, click **Cancel**.

Add Another Similar Template

AVImark allows you to easily duplicate templates that you had previously created. When adding another similar template, you will need to type a different code for the template.

- Select the template you wish to duplicate.
- Right-click and from the shortcut menu click **Another** to display the New Glossary window with the same values already entered.
- Edit the new template and click **OK**.

Move Note Templates to Other Categories

AVImark allows you to easily move note templates from one category to another.

- From the Glossary window, select the template you wish to move.
- To select multiple templates to move, press CTRL and then click the templates to be moved.
- Right-click and from the shortcut menu click **Move**. You will need to click **Yes** to confirm.
- Click the category you wish to move the specified template(s) to.

Create Note Templates from a Note Window

AVImark allows you to enter notes from any AVImark note window and then create a template to save in the Note Glossary.

- From any notes window, enter the notes you wish to create a template for.
- Use the mouse to highlight the text, or press CTRL+A to highlight all text.
- Right-click and from the shortcut menu click **Add to glossary** to display the New Glossary window.
- AVImark automatically enters the code and description for the template. If appropriate, change the code and description as necessary.

- AVImark automatically enters the category depending on the area you are currently in. If appropriate, use the **Category** drop-down list to select a different category.
- Click **OK** to save the note template.

Print Note Templates

- On the Glossary window, open the File menu. Click Print to display the Print Glossary window.
- Use the Print to drop-down list and select the correct printer.
- Click **Preview** to preview the templates onscreen or click **Print**.

View Notes Attached to Glossary Entries

Notes attached to glossary entries can be automatically previewed in the Glossary window.

- On the Glossary window, open the **View** menu. Click **Show/Hide Preview**.

Refresh the Note Glossary Window

AVImark allows you to refresh the Note Glossary. This may be necessary if a user on another workstation has updated the Glossary.

- On the Glossary window, open the **View** menu. Click **Refresh**.

Undo and Redo Changes

Changes to the Note Glossary list or to a note template can be reversed using the Undo and/or Redo feature.

- On the Glossary window, open the **Edit** menu. Click **Undo** or **Redo**.

View History of Entries

When a change to a line entry in the Note Glossary has been made, AVImark will create a log that records the Date, Time, User and the Action that was used to make the change of the line entry.

- On the Glossary window, open the **View** menu. Click **Entry History**.

Create Notes

AVImark allows you to create unlimited notes or memos from any appropriate AVImark display.

- From any appropriate AVImark display area, right-click and from the shortcut menu click **Notes** to display the Notes window.
- Type the desired note or memo. Word wrap and spell check are active in this window.
- If appropriate, right-click and from the shortcut menu select **Date/Time** to insert the current date and time into the text.
- Click **Done** to save or click **Cancel** to exit without saving.

Use Note Templates

After creating and storing note templates into the Note Glossary, you now have the ability to import those note templates into any AVImark note window.

Note template code is known

- Open any note window and type the code for the note template.
- Press SHIFT+SPACEBAR to import the template.

Note template code not known

- Open a note window. Right-click and from the shortcut menu click **View Glossary** to display the Glossary window.
- Click the appropriate template(s) to display the template name(s) in the **Selected** area and then click **Done**.

Copy and Paste Note Templates


You may copy and paste note templates from the Note Glossary into any AVImark note window or any other application such as MS Word.

- From the Note Glossary window, select the template(s) you wish to copy.
- Right-click and from the shortcut menu click **Select** to list the template(s) in the Selected and Preview windows.
- Use the MOUSE to highlight the text you wish to copy.
- Right-click and from the shortcut menu click **Copy**.
- Open any note window. Right-click and from the shortcut menu click **Paste**.

Importing Files

AVImark allows you to import text files (with an extension of .txt) into any note window. In addition, you may also import MS Word documents by saving the document as a text file and then storing it in the same directory as your other text files.

- From any note window, right-click and from the shortcut menu click **Import a file** to display the Open window.
- Use the **Files of type** drop-down list and select **Text Files**.
- Select the correct text file and click **Done**.

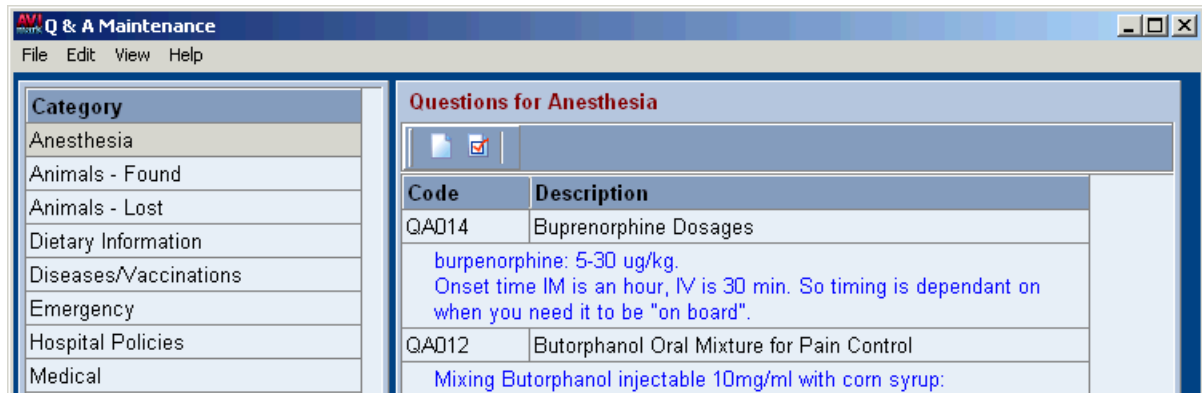
	To learn more about:	Search the Help for:
	Tag-a-long Instructions	Using Notes Windows
	Make Public	Display the Invoice
	Note Glossary	Table of Contents – Note Glossary

Printing from the Note Window

AVImark allows you to print any note from a note window.

- From any note window, open the File menu. Click Print to display the Print window.
- Use the **Print to** drop-down list and select the correct printer.
- Click **Preview** to preview the notes onscreen or click **Print**.

Accessing and Create Categories for Q & A



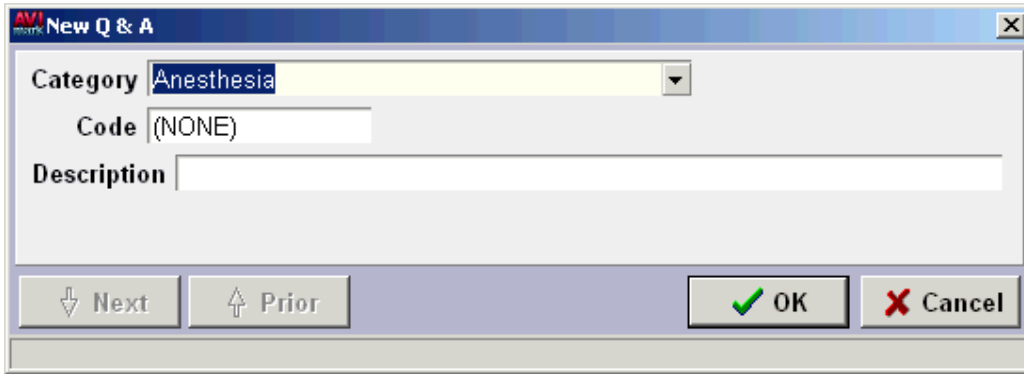
The Q & A Maintenance window is an in-house question and answer area. AVImark allows you to create categories within the Q & A in order to group similar topics together. You may organize the questions by category or by topic.

- On the CID, open the **Work with** menu. Click **Q & A** to display the Q & A Maintenance window.

- In the **Category** section, right-click and from the shortcut menu click **New** to display the New Q & A Category window.
- Type a **Category** name and click **OK**.

Enter a Question

- Select the **Category** you wish to create a question for.
- Point in the **Questions for** section. Right-click and from the shortcut menu click **New**.



Category

This field indicates the category where the question will be saved. AVImark will enter the category name automatically; however, you may change this to a different category if appropriate.

- If appropriate, use the **Category** drop-down list and select a Category.

Code

This is the code that will identify the Q & A.

- Type the desired **Code** for the question.

Description

This field is used for entering the desired question.

- Type the desired question and click **OK**.
- After clicking OK, a New Q & A window will continue to appear. This will allow you to create

	To learn more about:	Search the Help for:
	Setting up client discounts	Discounts; discount class

additional questions/answers under the selected category. When you are finished, click **Cancel**.

Entering an Answer

- With the correct question selected right-click and from the shortcut menu click **Notes** to display the Comments for window.
- Type the desired Answer/Comments and click **Done**.

CHAPTER 31: EXPORTING TO QUICKBOOKS®

AVImark allows you to send/export financial information to QuickBooks® for any specified length of time. Each time you export information to QuickBooks®, AVImark takes all appropriate financial information from the current date back to the most recent instance that you exported information to QuickBooks®.

In this chapter you will learn about...

- » Setting Up QuickBooks® to Receive from AVImark on page 355
- » Setting up AVImark to Export to QuickBooks® on page 355
- » Export to QuickBooks® on page 356
- » Exporting for the First Time on page 356
- » View the Exported File Prior to Importing to QuickBooks® on page 356

Setting Up QuickBooks® to Receive from AVImark

AVImark requires that certain accounts be set up in QuickBooks® before any information can be exported out of AVImark. The first requirement is that an Income Type account be set up in QuickBooks® for each AVImark treatment and inventory category. In QuickBooks® you set up an Income Type account for each of these categories. When setting up these income accounts you may have the option to assign account numbers to these accounts. As an alternative, it is not necessary to assign account numbers to the income accounts in QuickBooks® if the name of the income account matches exactly the description name in AVImark. The second requirement is that you will need to set up a liability account in QuickBooks® called Sales Tax Payable. The Code of the entry is Tax and the Description should be Sales Tax Payable. In QuickBooks®, you should have a vendor called Treasurer, state of (state name).

Setting up AVImark to Export to QuickBooks®


If assigning account numbers to your Income Type accounts in QuickBooks®, you will also need to assign the corresponding account number to each of your treatment and inventory categories. In addition, QuickBooks® has several predefined asset accounts that AVImark exports transaction totals to. Because of this, AVImark maintains a System Table called QuickBooks® Accounts. If you do not want to use the QuickBooks® Account Names listed in the QuickBooks® Accounts Table, you may change the table entry description only. Do Not change the code of the entries. These codes are specifically marked in AVImark so that when you export from AVImark and import into QuickBooks®, it will recognize those specific types of accounts.

Assign account numbers in AVImark

- On the CID, open the **Work with** menu. Click **Treatments** to display the Treatment List window.
- Double-click the correct **Treatment Category** name to display the Change Treatment Category window.
- In the **Account no.** field, type the account number that is used for this account in QuickBooks®.
- Click **Done** or press **Enter**.

Change QuickBooks® Accounts System Table names

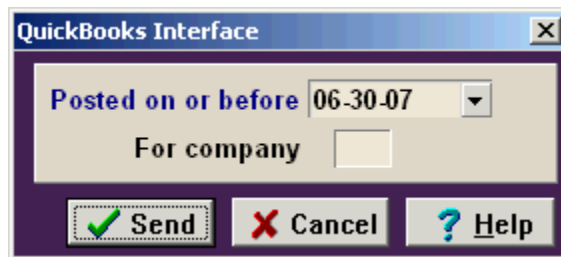
- On the CID, open the **Work with** menu. Click **System Tables** to display the System Tables window.
- From the Table section, click **QuickBooks® Accounts** to display the Entries for QuickBooks® Accounts.
- Double-click the **Entry** you wish to change the description for.
- On the Change Entry window, type the desired **Description** and click **OK**.

	To learn more about:	Search the Help for:
	Additional Set up Information	QuickBooks® Interface
	Set up Reference Chart	QuickBooks® Interface
	QuickBooks® Accounts	QuickBooks® Accounts – System Tables

Export to QuickBooks®

The information that is exported to QuickBooks® is all the transactions that have been posted from Medical History to Accounting. First, you need to tell AVImark to send all transactions to QuickBooks® that have been posted on or before a specified date. This date is specified by you and is done through the Utilities menu option from the CID. The second step is to import this information into QuickBooks® from the QuickBooks® program.

- On the CID, open the **Utilities** menu. Click **QuickBooks®** to display the QuickBooks® Interface window.



Posted on or before


The date entered in this field determines what transactions will be exported to QuickBooks®. Any transactions posted to accounting on or 30 days before this date will be exported to QuickBooks®.

- Enter the date.

For company

In most cases, this field will be left blank. Only if you have another Company Number defined in AVImark would you enter a company number. (It is not necessary to enter a number 1 if all you want to export is Company 1 information).

- If appropriate, enter the company number you wish to export for. Click **Send**.

	To learn more about:	Search the Help for:
	What gets Exported	Exporting to QuickBooks®
	Precautions	
Trouble shooting Tips		

Exporting for the First Time

The first time you export information from AVImark requires an additional step you would not otherwise make. As mentioned above, when you click Send from the QuickBooks® Interface window, AVImark takes all transactions posted on or 30 days before the date you entered in the date field. If it has been several months or years since you began using AVImark, and you are now going to use this feature, this first “export” out of AVImark will contain all financial information on or 30 days before the date you enter. To overcome this problem, the first time you export from AVImark, you should enter a date one day prior to when you want to commence sending information to QuickBooks®. For example, say you want to begin sending information to QuickBooks® beginning January 1, 2010. The first time you export information from AVImark you would enter a date of 12/31/09 in the date field of the QuickBooks® Interface window. Each time you export information AVImark will create an .iif file with the date and a sequence number as the name, identifying the date the file was exported from AVImark (i.e. 2010-01-31_1.iif).

View the Exported File Prior to Importing to QuickBooks®

If you are unsure as to what will be in the .iif file when you do an export, you have the ability to view this file in

the Microsoft Notepad program.

- On the Microsoft Windows® **Start** menu, point to **All Programs**.
- Point to **Accessories** and click **Notepad** to display the Notepad window.
- On the **File** menu, click **Open** to display the Open window.
- Use the **Look in** drop-down list and select the correct directory as specified in AVImark for exporting to.
- Select the **(date).iif** file and click **Open** to display the document listing all entries and amounts that have exported from AVImark.



AVImark does not allow you to redo the export once you click Send in the QuickBooks® Interface window. As a precaution, you should take a backup of your AVImark data just before exporting the information. In addition, once you import the .iif file into QuickBooks®, it will be very time consuming to delete all the entries that were posted to QuickBooks® if there was an error in how QuickBooks® or AVImark was set up prior to exporting the data from AVImark. As a result, you should also take a backup of your QuickBooks® data each time before importing the .iif file.

CHAPTER 32: CUSTOMIZING COLUMNS

AVImark gives you the ability to customize the look of the columns being displayed in several areas of the program. In addition, you may select multiple entries from these areas, and make a change to them at one time. Customizing columns is a workstation specific feature, meaning, the layout change will be held only on the computer it is changed on. The areas which have been formatted to allow you to utilize these features are: Treatment List, Inventory List, Estimates List, Diagnosis List, Problem List, Follow-up List, Q & A, Note Glossary, Users and Security, Time Card, System Tables, Appointment List, and the Whiteboard.

In this chapter you will learn about...

- » Customizing Columns on page 359
- » Adding and Removing Columns on page 359
- » Renaming Columns on page 360
- » Sort the Columns on page 360
- » Change the Width of Columns on page 360
- » Change Multiple Entries on page 360

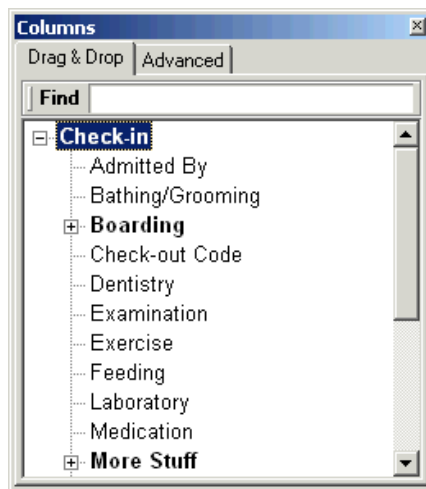
Customizing Columns

AVImark gives you the ability to arrange the Column Headings in the order you would like them to appear.

- Using a drag-and-drop operation, move the heading to the location you wish. Arrows will be displayed to indicate where the heading will be placed.

Adding and Removing Columns

You may add and remove Column Headings that you wish from the formatted areas.



Remove a heading

- In the formatted window, right-click to see the shortcut menu. Point to **View** and click **Columns** to display the Columns window.
- Move the heading to the **Drag & Drop** tab of the Columns window by using a drag-and-drop operation.

Add a heading

- From the Drag & Drop tab of the Columns window, select the heading you wish to add.
- Using a drag-and-drop operation, move the heading to the desired location. Arrows will be displayed to indicate where the heading will be placed.

Renaming Columns

AVImark gives you the ability to modify/change the name of a Column Heading.

- In the formatted window, right-click to see the shortcut menu. Point to **View** and click **Columns** to display the Columns window.
- In the Columns window, select the **Advanced** tab. All Column Headings currently being displayed will be shown in black and those that are not being displayed will be shown in gray.
- Select the heading you wish to modify/change.
- Using the **Caption** field, type the name you wish to change the heading to.
- To make the heading visible or not visible, select/unselect the **Visible** field.

Sort the Columns

There are two options for sorting the formatted Windows. You may sort entries by Column Headings, and/or by panel. Sorting by panel allows you to combine entries having the same characteristics into one group.

Sort by Column Heading

- In the formatted window, click a Column Heading to sort. With each click, the column will sort in ascending, descending or the default sort.

Group by Panel

- In the formatted window, right-click to see the shortcut menu. Point to **View** and click **Show/Hide Group Panel** to display a gray section just above the Column Headings.
- Move a heading into the gray section by using a drag-and-drop operation to display the entries in a collapsed view.
- Click the PLUS SIGN (+) to expand the view of the entries under that heading.
- If appropriate, move additional headings into the gray section next to the primary heading to further group the panel.

Change the Width of Columns

You may expand or narrow columns in the formatted windows.

- Point to the dividing line for the Column Heading you wish to change the width for.
- Drag the pointer in either direction to expand or narrow the column.

Change Multiple Entries

AVImark gives you the ability of changing Multiple Entries at one time in the formatted windows.

- Press CTRL and click the random entries you wish to change.
- OR
- Press SHIFT+UP ARROW/DOWN ARROW to select consecutive entries you wish to change.
 - Right-click and from the shortcut menu click **Change** to display the Change window of the first entry selected. The fields containing different information will be outlined in yellow.
 - Enter the necessary change(s) and click **OK** to make the change(s) on all selected entries.



After you have customized columns on a certain workstations, you may find it necessary at some point to return the window back to the original view. You may do so by clicking on the AVImark icon on the upper left-hand corner of the screen and selecting default layout from the drop down list.

CHAPTER 33: LAB INSTRUMENTS

AVImark interfaces with several different lab instruments allowing the hospital to become more self-sufficient with regards to laboratory needs. In addition, AVImark gives you the ability to import test results from outside laboratories.

In this chapter you will learn about...

- » Instrument Management on page 361
- » Set up the Abaxis® VetScan® HMT, HM II, HMTV and the VetScan® Chemistry on page 364
- » Defining Fields and Importing Results for Abaxis® Instruments on page 365
- » Set up the Abaxis® VS2 on page 366
- » Interface with the CDC Hemavet® on page 367
- » Interface with the Hemagen® Analyst on page 368
- » Interface with the Heska®/Scil Vet® ABC on page 371
- » Interface with the Heska® Spotchem EZ on page 372
- » Interface with the Heska® CBC-Diff on page 374
- » Interface with the Heska® DCU on page 375
- » Interface with the IDEXX® VetTest on page 376
- » Interface with the IDEXX® LaserCyte on page 377
- » Interface with the IDEXX® LabREXX on page 378
- » Interface with the Forcyte® on page 383
- » Interface with Antech® on page 384
- » Antech® XML Result Storage on page 388
- » Work with Requisition Management on page 389
- » Interface with VetConnect® on page 389
- » Interface with VDIC® VetMedStat Telemedicine on page 391
- » Interface with Vmed® Technology on page 394
- » Abaxis® i-STAT Integration on page 394
- » Abaxis® VetScan VSpro Integration on page 395
- » Scil Vet abc Plus+ Integration on page 397

Instrument Management

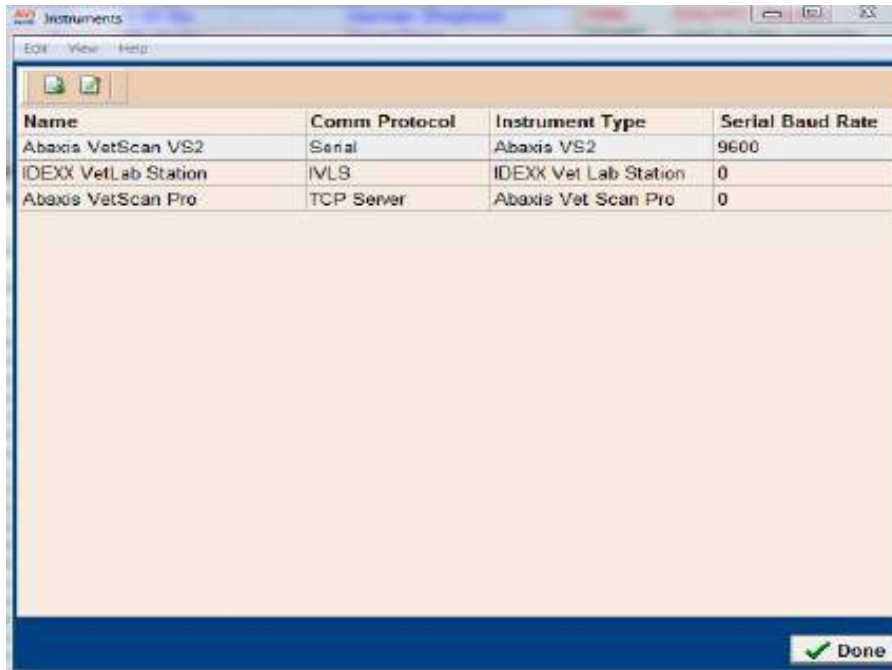
All integrated, in-house lab equipment can now be setup and managed in a single location within AVImark. We have taken the setup existing in Hospital Setup and Advanced Options and merged them into the new Instrument Management window. During the AVImark update process, instruments existing and in use on the AVImark Server computer will automatically have their instrument information automatically moved to the new location.

One of the biggest benefits of this new feature is the ability to have more than one instrument of the same type (such as the Abaxis® VS2) installed on the same AVImark workstation, and easily differentiate between them

NOTE: We have provided a new built in utility that can be run on AVImark workstations to transfer the instrument information on those computers that are currently in use for sending and/or importing test results. Instructions for this utility can be found at the bottom of this feature.

****The Instrument Management window will only display instruments installed on that physical AVImark workstation. Instruments installed on other AVImark workstations on your network will not be visible in the Instrument Management window on any other AVImark workstation.**

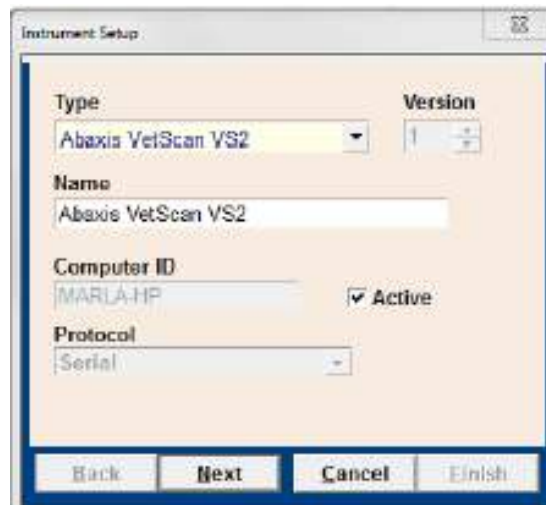
- From the AVImark Client Information Display (CID), select Services, Instrument Management. You will be presented with the Instruments window where instruments can be added, changed, or removed from AVImark.



Name	Comm Protocol	Instrument Type	Serial Baud Rate
Abaxis VetScan VS2	Serial	Abaxis VS2	9600
IDEXX VetLab Station	IVLS	IDEXX Vet Lab Station	0
Abaxis VetScan Pro	TCP Server	Abaxis Vet Scan Pro	0

Adding an Instrument

Right-click and select New or use F2 to open the Instrument Setup window. Select the appropriate Instrument Type from the drop down menu. The Name, Computer ID, and Protocol will automatically be selected based on the selected instrument. The Active checkbox will also default to being checked.



Instrument Setup

Type: Abaxis VetScan VS2 Version: 1

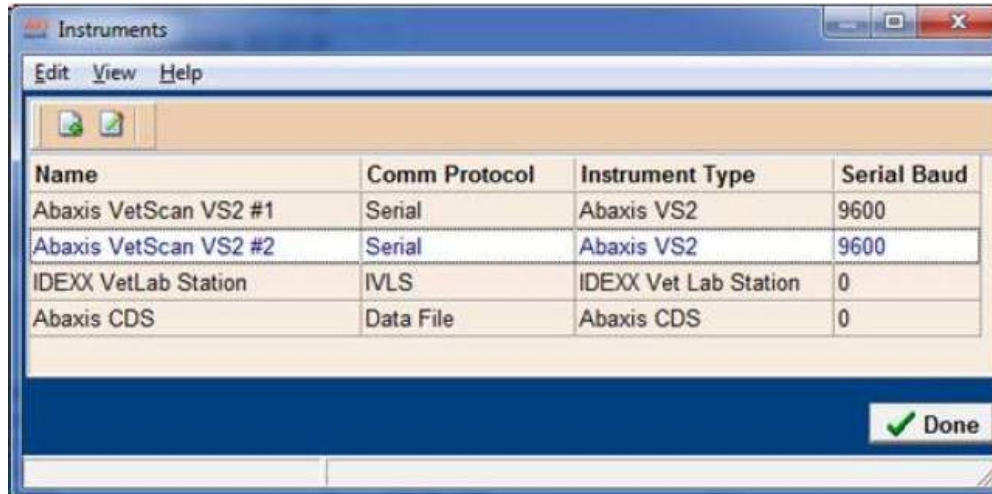
Name: Abaxis VetScan VS2

Computer ID: MARLA-HP Active

Protocol: Serial

Buttons: Back, Next, Cancel, Finish

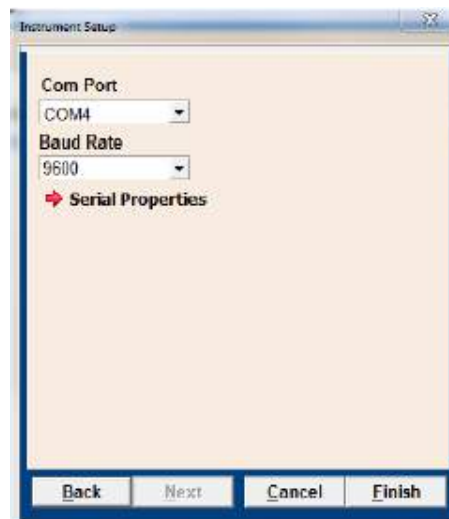
If you choose to have more than one instrument of the same type in use on an AVImark workstation, you will need to add an identifiable name for each of those instruments. See the image below:



The Instrument Name will be the name you will see when importing test results. This will allow you to identify which instrument associated to that treatment you are wanting to retrieve results from, as seen below:



Press the button labeled 'Next' to proceed to the window. You will make your Com Port and Baud Rate selections, or enter Proxy Server information, based on the instrument type selected in the previous window.





Once you have added all desired instruments, you are ready to begin retrieving results. Results will be imported with the same IVLS Proxy or Instrument Import utilities as before.

Running the InstrumentUpdate Utility

This utility will copy all instrument settings from their existing Hospital Setup and/or Advanced Option locations into the new Instrument Management area. This will need to run on each workstation being used for transmitting results into AVImark.

- Locate the AVImark workstation that communicates directly with in-house lab instruments, and log into AVImark.
- Select Utilities > Utilities > and type in InstrumentUpdate and press OK.
- Press No to the “A backup should be performed...”.
- Click Run to import the instrument settings.

You should now be able to select Work With > Instrument Management and see the instruments installed on that workstation.

Set up the Abaxis® VetScan® HMT, HM II, HMV and the VetScan® Chemistry

The Abaxis® machines are very similar in that you may collect data from the machines and input the data directly into the patient’s Medical History. The AVImark setup for all five machines is the same and the setup process need only be done once. You will be able to capture and store results as they are completed until you are ready to import them, and these results can be stored in one centralized location for easy access until you are

ready to import results into your AVImark patient's Medical History Test field.

AVImark settings

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab and select the **Instrument** tab.
- Select the correct machine from the list of Lab Instruments.
- From the **Instrument on** dropdown list select the correct Comport you are using.
- Using the **Baud Rate** dropdown list, select **9600**.
- Use the **Data Bits** dropdown list and select **8**.
- Use the **Parity** dropdown list and select **None**.
- Use the **Stop Bits** dropdown list and select **1**.
- Click **Done** to save the settings.

Abaxis® VetScan® HMT settings

- From the **VSHMT Ready** screen, press the **Menu** key.
- Select **Management**.
- Select **System** and press **Enter**.
- Select **Communication** and press **Enter**.
- Verify that the Serial Port setting for computer communication is the same as set in AVImark.
- Select **9600** for the **Baud Rate**.
- Select **8 bits** for the **Data**.
- Set the **Parity** and the **Data Out** to **None**.

Abaxis® HMII & HMT settings

- On the Abaxis® machine, press the **Nut and Bolt** icon.
- Select **Settings** and then select **Customize**. You should see **Input/Output**.
- Set the **Baud Rate** to **9600**.
- The **Serial Port Version** must be **3.0** or higher.
- Set the **Serial Decimal Dot** to **Lang Def**.



AVImark allows you to have several workstations in your hospital attached to the HMT and the HM II instruments. Consequently, the settings you enter into Hospital Setup at one workstation are kept separate from those entered at another workstation. For example, you may have workstation A connected through COM 1 and workstation B may be connected through COM 2.

Abaxis® VetScan® Chemistry settings

- Ensure the machine is connected with the cables provided by Abaxis®.
- Set the **Baud Rate** to **9600**.

Defining Fields and Importing Results for Abaxis® Instruments

With the AVImark Tests window you will not need to define test result fields but simply download the results.

Import results for VetScan® HMT and VetScan® Chemistry

- Enter the correct treatment code into the patient's Medical History.

- On the highlighted entry click the **Tests** attachment option to the right of the Medical History area.
- From the **Import From** menu select **Instrument Types** to select an instrument.
- Choose the appropriate Instrument Type and click **Import Results**.
- The results will be received in any value, type and with notes or comments as they are sent from the lab/instrument, as well as display the normal ranges as dictated by the lab or instrument at the time the test was completed.
- The results will be permanently associated to this Medical History entry.

Import results for Abaxis® HM II & HMV

You can go through AVImark and connect to the HMII and then run your test, or AVImark will automatically pull the results from the selected test that was run by resending it. When selecting a test that has already been run, ensure the correct patient is displayed on the CID.

Communication between the desired Abaxis® instrument and AVImark can be established allowing results to be passed to AVImark and stored until they are ready to be imported. This communication is established by an internal application called Instrument Import.

A storage folder to receive the results from the instruments is needed. This folder can be created inside the AVImark folder on the server computer. Once this storage folder is created, the path must be defined within the Advanced Option **Save Lab Instrument Results To**.

Now that the AVImark setup is complete, results from the Abaxis® instruments can now be transferred to the storage folder mentioned above.

- Open the connection by going to menu **Utilities, Run Instrument Import** select the appropriate instrument click on the Connect button. This should display a shaking hands icon in your System Tray.



- Each Abaxis® Instrument has an instrument specific way to transmit results; it is at this point you will follow the steps to send the desired results from the analyzer to the AVImark computer. Your results will then be transmitted into the Instrument folder you have created and set your AVImark path to reflect as outlined in previous steps.

To view and import results into patient records you will need to close the connection between your AVImark computer and the Abaxis® instrument. In order to accomplish this you will need to right-click on the shaking hands icon on the System Tray and click Close. You are now able to access these results through AVImark.

- Tests results can be automatically imported into the Medical History of the proper patients.
- Make sure the properly defined treatment code is entered into the patient's Medical History.
- On the highlighted entry click the **Tests** attachment option to the right of the Medical History area.
- From the **Import From** menu select **Instrument Types** to select an instrument.
- Choose the appropriate instrument type and click **Import Results**.
- The results will be received in any value, type and with notes or comments as they are sent from the lab/instrument, as well as display the normal ranges as dictated by the lab or instrument at the time the test was completed.
- The results will be permanently associated to this Medical History entry.

Set up the Abaxis® VS2

The setting up and importing of the Abaxis® VS2 results into AVImark can be easily performed.

AVImark settings

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab and select the **Instrument** tab.
- From the **Instrument on** dropdown list, select the correct Comport you are using.
- Click **Done** to save the settings.

Data Import

- Select the treatment in the patient's Medical History where the results will be stored.
- On the highlighted entry click the **Tests** attachment option to the right of the Medical History area.
- From the **Import From** menu select the appropriate machine. Click the **Instrument Types** option from the menu to select an instrument.
- Select an option from the menu will automatically open the download window. If you have selected an Instrument Type choose an instrument and click **Import Results**.
- The results will be received in any value, type and with notes or comments as they are sent from the lab/instrument, as well as display the normal ranges as dictated by the lab or instrument at the time the test was completed.
- The results will be permanently associated to this Medical History entry.

Interface with the CDC Hemavet®

AVImark will allow importing of CDC Hemavet® test result data. AVImark lets you collect data from the CDC Hemavet® machine and input the data directly into the patient's medical history.

AVImark settings

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab and select the **Instrument** tab.
- Select the **CDC Hemavet®** machine from the list of Lab Instruments.
- From the **Instrument on** dropdown list, select the correct Comport you are using.
- Using the **Baud Rate** dropdown list, select **9600**.
- Use the **Data Bits** dropdown list and select **8**.
- Use the **Parity** dropdown list and select **None**.
- Use the **Stop Bits** dropdown list and select **1**.
- Click **Done** to save the settings.

Define result fields

In order for AVImark to allow the Hemavet® to import the results for a given treatment the fields will need to be defined. This can be done from either Medical History or the Treatment List.

- From your Treatment List, select the correct treatment. **Right-click** and from the shortcut menu click **Change** to display the Change Treatment window.
- In the **Attachments** section, select **More Stuff** to display the Define More Stuff window.
OR
- Select the correct treatment from the patient's Medical History.
- Right-click and from the shortcut menu point to **More Stuff** and click **Define Fields**.
- On the **Work With** menu, click **CDC Hemavet®**.

Lab Instruments

- You will need to click **Yes** to confirm. A message will display at the bottom of the More Stuff window informing you that it is connecting to the instrument.
- Run the test on the CDC Hemavet®. After approximately 5 minutes the fields will be defined.
- It is recommended that you define **Normals** at this time.

Data import

Once the data fields are defined as described above, you will be able to automatically import data from the Hemavet® machine directly into the Medical History of the patient when the treatment is performed.

- Enter the correct treatment code into the patient's Medical History.
- With the treatment highlighted in Medical History, right-click and from the shortcut menu point to **More Stuff** and click **Enter Data**.
- On the **Work With** menu, click **CDC Hemavet®**.
- You will need to click **Yes** to confirm and proceed.
- Run the test on the machine and after approximately 5 minutes, the results will import into the fields.

Interface with the Hemagen® Analyst

AVImark allows you to collect data from the Hemagen® Analyst and input the data directly into the patient's Medical History.

AVImark settings

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab and select the **Instrument** tab.
- Select **Hemagen®** from the list of Lab Instruments.
- From the **Instrument on** dropdown list, select the correct Comport you are using.
- Using the **Baud Rate** dropdown list, select **9600**.
- Use the **Data Bits** dropdown list and select **8**.
- Use the **Parity** dropdown list and select **None**.
- Use the **Stop Bits** dropdown list and select **1**.
- Click **Done** to save the settings.

Define result fields

In order for AVImark to allow the Hemagen® to import the results for a given treatment the fields will need to be defined. This will need to be done from the Treatment List.

- From your Treatment List, select the correct treatment. Right-click and from the shortcut menu click **Change** to display the Change Treatment window.
- In the **Attachments** section, select **More Stuff** to display the Define More Stuff window.
- On the **Work With** menu, click **Hemagen®**. You will need to click **Yes** to the prompt and a message will display at the bottom of the More Stuff window informing you that it is connecting to the instrument.
- Run the test on the **Hemagen®**. After approximately ten minutes the fields will be defined.

Data import

Once the data fields are defined as described above, you will be able to automatically import data from the Hemagen® machine directly into the Medical History of the patient when the treatment is performed.

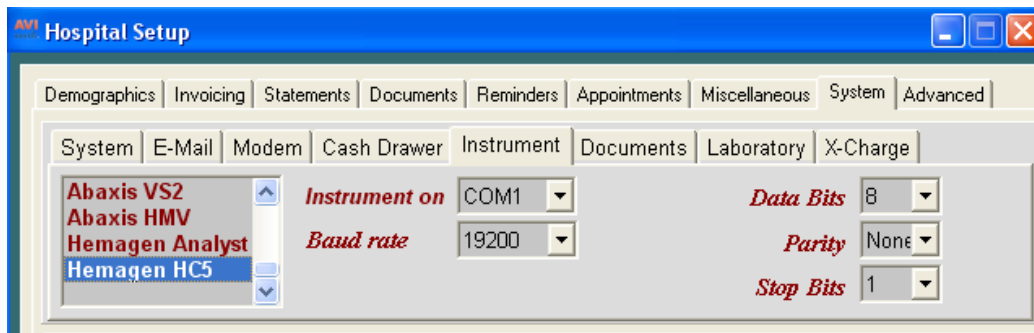
- Enter the correct treatment code into the patient’s Medical History.
- With the treatment highlighted in Medical History, **right-click** and from the shortcut menu point to **More Stuff** and then click **Enter Data**.
- On the **Work With** menu, click **Hemagen®**. You will need to click **Yes** at the prompt to proceed.
- Run the test on the machine. AVImark will import the results into the data fields.

Hemagen® Instrument Interface

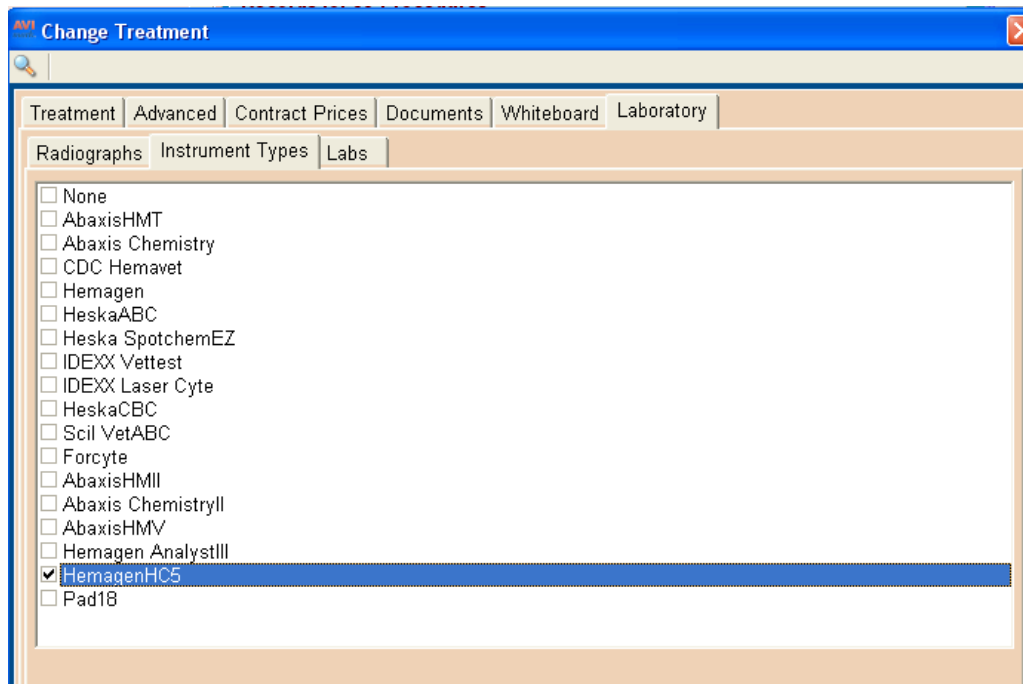
The Hemagen Analyst III and HC5 in-house analyzers are the newest addition to the AVImark Instrument Import utility. Results can be captured and automatically imported into patient records with minimal user intervention.

Setup:

Assign the appropriate comport for each instrument on the appropriate AVImark workstation. For example, if you have the Hemagen HC5 connected to serial port Com 1, then your AVImark port setting in Hospital Setup, System tab, Instrument sub tab should reflect that setting.



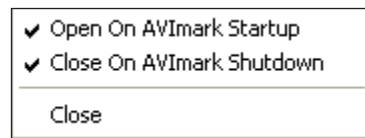
Assign your instrument to the Instrument Types tab of the appropriate AVImark treatment.



****Important NOTE:** As of AVImark version 2009.3, you have the ability to assign multiple instruments or labs to a single AVImark treatment. If you have more than one instrument that is used to perform a single treat-

ment such as a pre-surgical panel, you are no longer required to have one AVImark treatment per instrument; or in the case that you have more than one instrument that can perform the same test, such as an IDEXX instrument and a Heamgen instrument that can each run the same CBC test.

- The utility can be found by accessing Utilities, Run Instrument Import.
- This utility is now set up to automatically start when AVImark starts, and has the option to Close on AVImark Shutdown.
- When AVImark opens you will see the “shaking hands” icon located in the System Tray of your workstation. This indicates that AVImark is in communication with the instrument(s) assigned to communication ports on this computer, and is “listening” on each port for any incoming data.
- The options to Start when AVImark opens, and Close on AVImark Shutdown can be controlled by right click options on the icon in the System Tray.



**** Important NOTE:** If you have de-selected the Close on AVImark Shutdown option, please note you will need to manually close the connection utility prior to index rebuilding or any other maintenance utility that requires exclusive access to AVImark files.

Once the instrument is properly assigned in Hospital Setup, and associated to the AVImark treatment(s), your setup is complete.

Use:

When a treatment is entered into Medical History for a patient that has an instrument assignment, AVImark will start listening to the ports in which the associated instruments are assigned for results. As results are ready to be transmitted, AVImark will import the results to the proper Medical History entry. If the proper Medical History cannot be located, the results will be sent to the new “**Test Inbox**” to await manual import.

- First, the import utility looks for a patient with a record number that matches the “Patient ID” field received from the instrument.
 - The Patient ID that is being searched for a match is the AVImark Patient ID.
 - When running the test on the designated analyzer, and prompted for a patient identifier, the AVImark Patient ID is the number that will allow the utility to make the proper patient association for automatic result import.
- Once the patient identifier is located on the incoming results, the utility will begin searching for a Medical History entry for that patient that is awaiting results.
- When that Medical History entry is located, the results will be automatically imported into the Tests Attachment area.
- If the Patient ID doesn’t match or exist or there is no matching Medical History entry on that patient awaiting results, the test results are placed in the “**Test Inbox.**”
- To manually import the results that were sent to the Test Inbox, simply highlight the Medical History entry you wish to import results for, select the Tests attachment, **Import From, Test Inbox.** You will be presented with a list of results that were transmitted from instruments that did not find the Medical History entry to complete the automatic import. Select the set of results you wish to import to this history entry, and click Done.
- When you “Import from” the Test Inbox, the record is actually moved from the Test Inbox onto that Medical History entry. This will allow the Test Inbox to only contain results that have not been imported to Medical History.

- As an additional safety measure to ensure no results are lost, an RX\$ file is also created with the transmitted results. This RX\$ file is sent to the user defined Instruments storage folder. This path to this storage folder will need to be set in Advanced Options. Select the “Save Lab Instrument results To” entry and assign the path to your storage folder. If you are currently using AVImark to retrieve your results, you likely already have this in place.
 - Results can be imported from this location if needed by opening the Tests attachment, select **Import From, Stored Tests**. This will display all stored RX\$ files on the left pane. You can select the RX\$ file that holds your test, move to the right pane, select the test, right-click Import Test.
- In the case of an emergency, where access to results is immediately needed, right click on the treatment in Medical History that has the lab instrument association that represents the test instrument being used, and select **Import Results**. This will open the **Associated Instruments** window displaying a list of associated instruments for this treatment. Place a check in the box that represents the instrument from you wish to receive results, click the Import Results button, and AVImark will begin listening to these ports. In the event there is only one instrument associated to the treatment, the instrument checkbox will automatically be checked and listening to the proper port. As the data is sent from the instrument via the port, AVImark will capture and place it immediately in the Test Results window. After the results are received, the Import Results window will disappear, and you can view the results by selecting the Tests attachment option for that Medical History entry.

****Important NOTE:** To alleviate the chance of sending results automatically to the wrong Medical History record that may also meet the requirements for automatic import selection we have incorporated a two day time frame to use for searching, then selecting the oldest entry in that time frame for which these results would apply, to make the result attachment. To summarize, the utility will look for that patient record, then start at the farthest date/time as dictated by the two day time frame, and apply it to the first one it finds....versus starting with the most recent and looking back.

Interface with the Heska®/Scil Vet® ABC

AVImark allows you to collect data from the Heska®/Scil Vet® ABC and input the data directly into the patient’s Medical History. You may run up to 16 tests at a time; however, you will not be able to run a panel. Before using this machine, in **Work With, System Tables** you must have a Chemistry Table. If this table does not appear please call Technical Support.

AVImark settings

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab and select the **Instrument** tab.
- Select **Heska® ABC** or **Scil Vet® ABC** from the list of Lab Instruments.
- From the **Instrument on** dropdown list, select the correct Comport you are using.
- Using the **Baud Rate** dropdown list, select **9600**.
- Use the **Data Bits** dropdown list and select **8**.
- Use the **Parity** dropdown list and select **None**.
- Use the **Stop Bits** dropdown list and select **1**.
- Click **Done** to save the settings.

Heska®/Scil Vet® ABC settings

- Ensure **Main** menu is displayed.
- Press **5** for **Setup**.
- Press **5** again for **Host Option**.
- Press **1** for **Host Comm**.

- Press **3** for **Standard**. This will return you to the previous menu.
- Press **2** for **Send limit**.
- Press **2** again for **Off**. This will return you to the previous menu.
- Press **3** for **BAUD** rate.
- Press **5** for **9600**. This will return you to the previous menu.
- Press **ESC** several times to return to the main menu.

Define result fields

AVImark can assist you with the process of defining the data fields using the Heska®/Scil Vet® ABC instrument if you wish. Defining your fields this way insures that the fields are properly defined with exactly the right field names and data types. If you elect to auto-define the fields from the patient's medical history, the results will NOT be automatically imported.



Different analysts are returned with different species cards. If you have only one treatment for the test, it is recommended that you use the Dog species card because it has the most extensive list.

- From your Treatment List, select the correct treatment. Right-click and from the shortcut menu click **Change** to display the Change Treatment window.
 - In the **Attachments** section, select **More Stuff** to display the Define More Stuff window.
- OR
- Select the correct treatment from the patient's Medical History.
 - Right-click and from the shortcut menu point to **More Stuff** and click **Define Fields**.
 - On the **Work With** menu, click **Scil Vet ABC** or point to **Heska®** and click **Heska® ABC**.
 - Insert the species card into the Heska® and then select the option to load the new card.
 - Click **Yes** to the prompt. A message will display at the bottom of the More Stuff window informing you that it is connecting to the instrument.
 - Run the test on the ABC. This will take approximately 1 ½ minutes to run. You may run up to 16 tests at a time; however, you can not run a panel.
 - It is recommended that you define **Normals** at this time.

Data import

- Enter the correct treatment code into the patient's Medical History.
- With the treatment highlighted in Medical History, **right-click** and from the shortcut menu point to **More Stuff** and click **Enter Data**.
- On the **Work With** menu, click **Scil Vet ABC** or point to **Heska®** and then click **Heska® ABC**.
- You will need to click **Yes** to confirm and proceed.
- Run the test on the machine. This will take approximately 1 ½ minutes to run. AVImark® will import the results into the data fields.

Interface with the Heska® Spotchem EZ

AVImark allows you to collect data from the Heska® Spotchem EZ and input the data directly into the patient's Medical History. You may run up to 9 tests at a time. In addition, you may also run panels and/or individual test. Before using this machine, in **Work With, System Tables** you must have a Chemistry Table. If this table does not appear please call Technical Support.

AVImark settings

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab and select the **Instrument** tab.
- Select **Heska® Spotchem EZ** from the list of Lab Instruments.
- From the **Instrument on** dropdown list, select the correct Comport you are using.
- Using the **Baud Rate** dropdown list, select **9600**.
- Use the **Data Bits** dropdown list and select **7**.
- Use the **Parity** dropdown list and select **Even**.
- Use the **Stop Bits** dropdown list and select **2**.
- Click **Done** to save the settings.

Heska® Spotchem EZ settings

- Ensure **Main** menu is displayed.
- Press **Menu** and **Stop** simultaneously.
- At the prompt for a password, press the **-/.** Button.
- Enter **4430** and then press the **-/.** Button.
- Press **Enter**. You will be returned to the Main menu and the PLUS SIGN (+) should be present on the right side of the screen.
- Press **2** for **Submenu**.
- Press **6** for **Setup**.
- Press **3** for **Communication**. The cursor will be located in the Use field.
- Press the **-/.** button to toggle to **On**.
- Press **Enter** to move to the **Format** field.
- Press the **-/.** Button until **1** is displayed.
- Press **Enter** to move to the **BAUD rate** field.
- Press the **-/.** Button until **9600** is displayed.
- **ID** format will be displayed, press **Enter**.
- Writing will be displayed, press **Enter**.
- Press **Stop** until **Back to User Mode?** is displayed.
- Press **Start**.

Define result fields

In order for AVImark to allow the Spotchem to import the results for a given treatment the fields will need to be defined. This can be done from either Medical History or the Treatment List.

- Run the test on the Spotchem. Each test takes a different amount of time to run. Normally, it will take 9 ½ minutes when using blood and 6 ½ minutes when using serum.
- From your Treatment List, select the correct treatment. Right-click and from the shortcut menu click **Change** to display the Change Treatment window.
- In the **Attachments** section, select **More Stuff** to display the Define More Stuff window.

OR

- Select the correct treatment from the patient's Medical History.
- Right-click and from the shortcut menu point to **More Stuff** and click **Define Fields**.
- On the **Work With** menu, point to **Heska®** and then click **Heska® Spotchem EZ**.
- You will need to click **Yes** to confirm and proceed.
- Select the option on the Spotchem to send the desired results (generally the last test run).
- It is recommended that you define **Normals** at this time.

Data import

- Run the test on the Spotchem. Each test takes a different amount of time to run. Normally, it will take 9 ½ minutes when using blood and 6 ½ minutes when using serum.
- Enter the correct treatment code into the patient's Medical History.
- With the treatment highlighted in Medical History, right-click and from the shortcut menu point to **More Stuff** and click **Enter Data**.
- On the **Work With** menu, point to **Heska®** and click **Heska® Spotchem EZ**.
- You will need to click **Yes** to confirm and proceed.
- Select the option on the Spotchem to resend the results from the last test that was ran.

Interface with the Heska® CBC-Diff

AVImark lets you collect data from the Heska® CBC machine and input the data directly into the patient's Medical History. In order to utilize the interface between the CBC Diff and AVImark, you must be on AVImark version 174 or higher. Before using this machine, in **Work With, System Tables** you must have a Chemistry Table. If this table does not appear please call Technical Support.

AVImark settings

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab and select the **Instrument** tab.
- Select **Heska® CBC** from the list of Lab Instruments.
- From the **Instrument on** dropdown list, select the correct Comport you are using.
- Using the **Baud Rate** dropdown list, select **9600**.
- Use the **Data Bits** dropdown list and select **8**.
- Use the **Parity** dropdown list and select **None**.
- Use the **Stop Bits** dropdown list and select **1**.
- Click **Done** to save the settings.

Heska® CBC-Diff settings

There are some settings to choose from on the CBC-Diff for the various printer options. This will allow you to print to an external printer as well as import results into AVImark.

- From the CBC-Diff **Main** menu, select option **2** or **3**.
- Select **6** to only send results to AVImark.
- Select **7** to send results to AVImark and print results in text only.
- Select **8** to send to AVImark and print the text results as well as graphs.

Define result fields

In order for AVImark to allow the CBC-Diff to import the results for a given treatment the fields will need to be defined. This can be done from either Medical History or the Treatment List.

- From your Treatment List, select the correct treatment. Right-click and from the shortcut menu click **Change** to display the Change Treatment window.
- In the **Attachments** section, select **More Stuff** to display the Define More Stuff window.

OR

- Select the correct treatment from the patient's Medical History.
- Right-click and from the shortcut menu point to **More Stuff** and click **Define Fields**.
- On the **Work With** menu, point to **Heska®** and click **Heska® CBC-Diff**.
- You will need to click **Yes** to confirm. A message will be displayed at the bottom of the Define More Stuff window indicating it is connecting to the CBC-Diff and preparing to run a test.
- It is recommended that you define **Normals** at this time.

Data import

Once the data fields are defined you will be able to automatically import data from the Heska® CBC-Diff directly into the patient's Medical History once the service is performed. If you have defined the data fields through the patient's Medical History you will need to run the test again to enter the results. If you have defined the fields through the Treatment List follow these steps:

- Enter the correct treatment code into the patient's Medical History.
- With the treatment highlighted in Medical History, right-click and from the shortcut menu point to **More Stuff** and click **Enter Data**.
- On the **Work With** menu, point to **Heska®** and click **Heska® CBC-Diff**.
- Click **Yes** to download the test results.

Interface with the Heska® DCU

AVImark has the ability to retrieve lab results via the Heska® DCU. This interface will allow the capture and subsequent storage of results from several Heska® instruments. With our DCU interface you will now be able to utilize results from these instruments as well as the following: Hema True; DRI-CHEM; and i-STAT.

Setup

The results will be automatically transmitted to a user specified storage folder in an .XML format. This storage folder will need to be assigned in the DCU software as well as AVImark. You can create the storage folder in any accessible location. An example of an accessible location would be in the AVImark folder as a sub-directory.

- From your System Tray open the Heska® DCU
- Click **Preferences**
- In the Output folder click on the browse button to locate the storage folder you created

In order to retrieve results using this interface, you will need to assign the directory location for these stored results in the AVImark Advanced Options.

- Click on the hammer, wrench, and screwdriver icon in the AVImark Speedbar.
- Type **DCU** in the Search field
- Select the **DCU Results Path** option and enter the path to the location in which your DCU software receives and stores results.

Data Import

- Select the appropriate entry in the patients Medical History.
- Select the treatment in the patient's Medical History where the results will be stored.
- On the highlighted entry click the **Tests** attachment option to the right of the Medical History area.
- From the **Import From** menu select Heska® DCU.
- Select the appropriate file to display the file details.
- Select the line that represents the test that you want to import into the patient's record, and choose **right-click Import**.
- A message will be prompted indicating that the results have been imported, click **OK**
- The results will be received in any value, type and with notes or comments as they are sent from the lab/instrument, as well as display the normal ranges as dictated by the lab or instrument at the time the test was completed.
- The results will be permanently associated to this Medical History entry.

Interface with the IDEXX® VetTest

AVImark gives you the ability to use the VetTest instrument to automatically define the AVImark test result fields for your different analysis tests, as well as to import test results into the patient's medical history for these analyses. A single test result or a panel of up to 12 result values (the capacity of the VetTest instrument) can be imported at one time. AVImark also allows tests to be run with the results automatically transfer to a location that has been defined within the AVImark Advanced Options without having a More Stuff window open during the test. This allows for the fields to be defined and results to be entered at a more convenient time during the day. Before using this machine, in **Work With, System Tables** you must have a Chemistry Table. If this table does not appear please call Technical Support.

AVImark settings

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab and select the **Instrument** tab.
- Select IDEXX® Vettest from the list of Lab Instruments.
- From the **Instrument on** dropdown list, select the correct Comport you are using.
- Using the **Baud Rate** dropdown list, select **9600**.
- Use the **Data Bits** dropdown list and select **8**.
- Use the **Parity** dropdown list and select **None**.
- Use the **Stop Bits** dropdown list and select **1**.
- Click **Done** to save the settings.

IDEXX® Vet Test settings

- From the **Main** menu of the IDEXX® 8008 machine press **5, 7, 4** to display the **Transmission Control**. This should read **Disable**.
- From the **Main** menu of the IDEXX® 8008 machine press **5, 7, 3** to display the **Transmission Format**. Set to **Original** format.
- From the **Main** menu of the IDEXX® 8008 machine press **0, 4** to display the **Enable Interpretation and Enable Serial Comms** options.
- Set **Enable Interpretation** to **On**.
- Set **Enable Serial Comms** to **Off**.

Connectivity test

Before running an actual test it is recommended to do a dry run to ensure there is a valid connection.

- Enter a treatment code into the patient's Medical History.
- In the **Attachments** section of Medical History, select **More Stuff**.
- Click **Yes** to the prompt to display the Define More Stuff window.
- On the **Work With** menu, point to **IDEXX®** and click **IDEXX® Vet Test**.
- Click **Yes** to the prompt.
- Click **6** on the IDEXX® 8008 machine to initialize remote devices. A message will be displayed at the bottom of the Define More Stuff window indicating it is connecting to the IDEXX® Vet Test.



On the Vet Test® 8008 machine you should see an icon of a small computer. This will only appear for a few seconds. If no icon appears, stop here and contact our Technical Support to see if we can further assist you.

Data import

- Enter the correct treatment code into the patient's Medical History.
- Select the treatment in the patient's Medical History where the results will be stored.
- On the highlighted entry click the **Tests** attachment option to the right of the Medical History area.
- From the **Import From** menu select the **Instrument Types** option.
- Click the **IDEXX Vetest** option and click **Import Results**.
- Click **6** on the IDEXX® 8008 machine to initialize remote devices.
- Load the appropriate slide(s) and conduct the analysis on the sample. The Vetest will prompt you to remove the sample when the test is complete.
- Press **E** on the IDEXX® 8008 machine to send the results to AVImark.
- The results will be received in any value, type and with notes or comments as they are sent from the lab/instrument, as well as display the normal ranges as dictated by the lab or instrument at the time the test was completed.
- The results will be permanently associated to this Medical History entry.

Interface with the IDEXX® LaserCyte

AVImark lets you collect data from the IDEXX® LaserCyte machine and input the data directly into the patient's medical history. To utilize the interface between the IDEXX® LaserCyte and AVImark, you must be on AVImark version 174 or higher. The integration provides the ability to run several tests on the LaserCyte and store these results until you are ready to import them into AVImark. In addition, this integration gives you the ability to run tests on multiple IDEXX® instruments at once and have all of the results sent to AVImark as they are completed. By setting up the IDEXX® machines (VetTest, Snap Reader, Vet Stat, LaserCyte, and QBC) to connect directly into the IDEXX® Vetlab Station, the results from each of these machines can be sent from the Vetlab Station to AVImark as soon as they are completed. Before using this machine, in **Work With, System Tables** you must have a Chemistry Table. If this table does not appear please call Technical Support.

AVImark settings

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab and select the **Instrument** tab.
- Select **IDEXX® LaserCyte** from the list of Lab Instruments.
- From the **Instrument on** dropdown list, select the correct Comport you are using.

- Using the **Baud Rate** dropdown list, select **9600**.
- Use the **Data Bits** dropdown list and select **8**.
- Use the **Parity** dropdown list and select **None**.
- Use the **Stop Bits** dropdown list and select **1**.
- Click **Done** to save the settings.

IDEXX® LaserCyte settings

- Once the LaserCyte recognizes the connection to the AVImark computer an icon of a computer (PIMS) will show on the LaserCyte.
- On the main screen go to the settings, **Practice Management** and choose other.
- You can then set transmit to **On** in the Practice Management tab.

Data import

- Enter the correct treatment code into the patient's Medical History.
- Select the treatment in the patient's Medical History where the results will be stored.
- On the highlighted entry click the **Tests** attachment option to the right of the Medical History area.
- From the **Import From** menu select the **Instrument Types** option.
- Click the **IDEXX Laser Cyte** option and click **Import Results**.
- The results will be received in any value, type and with notes or comments as they are sent from the lab/instrument, as well as display the normal ranges as dictated by the lab or instrument at the time the test was completed.
- The results will be permanently associated to this Medical History entry.



To learn more about:

IDEXX® VetStation/LaserCyst set up

Search the Help for:

IDEXX® LaserCyte

Interface with the IDEXX® LabREXX

AVImark includes LabREXX, a feature that allows you too quickly and easily create IDEXX® Reference Laboratories bar-coded test orders to be used in conjunction with VetConnect®. AVImark and IDEXX® have teamed up to help increase the efficiency of your practice AND improve your bottom line. Best of all, LabREXX in AVImark can eliminate some of the paperwork.

- To utilize this interface you will first need to have your **Username** and **Password** set up through IDEXX®.
- This can be accomplished by sending a request to lablink@IDEXX.com. You should include your Hospital Name, phone number, and your request for a username and password that will allow access to send and retrieve results via the AVImark/LabREXX interface.
- Once you have been assigned your username and password, you will need to enter them into the appropriate fields in **AVImark Advanced Options**. You will find the proper data fields by using the Options Maintenance icon on the CID screen, type **IDEXX** into the Search field, you will see two options, **IDEXX LabREXX Password**, and **IDEXX LabREXX User ID**.
- Enter the appropriate information into the corresponding field by clicking on the **Change** Button for each and setting the Hospital Default Value.
- You also have the option of having each doctor have their own Username and Password. This can be beneficial in a practice where there are multiple doctors, each sending and receiving Lab Requisitions and Results. Having each doctor have their own individual access codes will allow each doctor

to choose and store their own favorites, for fast easy selection. When a user with a user specified LabREXX username and password logs into AVImark, the information associated to that username and password will be the information that will be automatically displayed in the IDEXX® LabREXX Site.

Set up a Requesting Doctor

AVImark gives you the ability to select a requesting doctor for the requested test without being logged in as the particular requesting doctor. This feature allows doctors to be selected on-the-fly in the LabREXX window, no longer causing doctors to share their AVImark passwords with staff members to allow the filling of LabREXX requisitions on their behalf.

- Open the Options Maintenance window by selecting the **Advanced Options** speed button.
- In the Search field type **labrexx**. Click on the plus symbol next to IDEXX VetConnect to expand the view and display options.
- Select the option **Password** and in the User area select **right-click New**. Choose the staff member or leave the option set to none if the same values will be used by all doctors.
- If your clinic wishes to use one default password for multiple doctors enter the password in the **Default** field. For doctors that want to use their own specific password, enter their assigned password instead of the default password.
- Use the **Value** field to enter an ID User value, which is user specific.
- Click **OK** once the appropriate information has been entered.
- Next select the **Username** option and choose **right-click New** under the User area.
- Click on the **User** drop-down list to choose the appropriate doctor or leave it set to none.
- Enter their **Username** that they previously set up on www.VetConnect.com.
- Click **OK** once the appropriate information has been entered.

When creating a requisition form you will have the option to select a **Test Doctor** and this doctor will also be recognized as the performing doctor for the corresponding Medical History entries. Both the user who is logged in when creating the Requisition Form and the Testing Doctor will appear on the Requisition Form.

Attaching LabREXX Codes to AVImark Treatments

LabREXX codes can be associated to existing AVImark treatments.

- Choose **Work with, Treatments** from the CID menu.
- Locate the appropriate treatment you wish to associate the LabREXX code and select **right-click Change**.
- In the Change Treatment window click the **Laboratory** tab and select the **VetConnect** sub-tab.
- **Right-click** in the LabREXX field and select **Code List**. This will display a list of all LabREXX codes and their associated prices.
- Choose the appropriate code and click **Done**.
- Once the selection is made the LabREXX code will appear in the LabREXX field.
- Click **OK** once the information has been set.

The LabREXX code is now associated with the selected treatment. When you finalize a LabREXX requisition that has been associated to an AVImark treatment, the treatment will automatically be entered in the pets Medical History.

Using the LabREXX Requisition

- **Right-click** in the AVImark Patient Area, select **Interfaces, IDEXX LabREXX**.

- You will be presented with the **IDEXX LabREXX** window with two tabs being displayed.

The screenshot shows a window titled "LabRexxForm" with a sub-header "Idexx Lab REXX". It has two tabs: "Create Requisition" (active) and "Retrieve Requisition". The form contains the following fields:
- Patient Name: Zoey
- Patient Group: CANINE (dropdown)
- Patient Breed: BORDER_COLLIE (dropdown)
- Patient Gender: FEMALE_SPAYED (dropdown)
- Client Name: Cravens, Marla
A "Create" button is centered below the fields, and a "Cancel" button is in the bottom right corner.

- On the **Create Requisition** tab, you will see that the Patient Name, Species, Breed, Gender, and Client Name will automatically be populated based on the information. You have the opportunity to make changes in the Group, Breed, or Gender by using the available drop down lists. Click the **In House Pet** option to indicate this form is being created for a pet belonging to a staff member.
- To proceed with creating the requisition form, click on the **Create** button.
- This will open a Web Browser that will open to the LabREXX window.

Viewing the LabREXX Web Browser

The screenshot shows a web browser window titled "aviWebBrowser" displaying the "LabREXX" application. The browser has three tabs: "1. Tests", "2. Specimen Details", and "3. Review Form". The "1. Tests" tab is active. The interface includes:
- A "Search for Tests" section with a search bar and a "Search" button.
- A "Filter list by test category" dropdown menu set to "All Categories".
- A table of tests with columns "Code" and "Name".
- A "Current Requisition" summary box showing: Patient: Zoey, Vet: Avimark One, Staff: Avimark One, Tests: (empty).
- "Save Draft" and "Next" buttons at the bottom.
- The IDEXX LABORATORIES logo in the bottom right corner.

Code	Name
8	Immune Profile #1 - Canine
6	Coagulation Profile
1013	Total Health™
721	Anaplasma phagocytophilum Antibody ...
700	Antinuclear Antibody (ANA) by IFA*
1113	Chem 27
11	Large Animal Profile
4111	Mycoplasma Culture Add-on*
5	Renal Profile + Calcium

- The first section will be **1. Tests** which is where you will select the test(s) to be performed, view the Top 20 Tests Ordered, Full List of available tests, and filter the list by categories.
- You will see in the lower right corner a Current Requisition area. This will already contain the patient you are working with as well as the doctor performing the request.
- To make a selection for a test to be added to the Requisition form, simply find the test in the list and click on the **Select** option to the right of the Test Name.
- The Current Requisition area will then display the chosen tests for this patient.
- When you have made your final selection, you have the option of Saving a Draft to this point to be completed at a later time, or clicking **Next** to proceed.
- Clicking **Next** will take you into the second main section, **2. Specimen Details**. In this area you can make selections for collection methods as required by certain tests, add Notes and Instructions, comparison requests, or provide a number where you would like faxed results sent, etc.

The screenshot shows the LabREXX web application in a browser window. The page title is 'LabREXX' and the navigation tabs are '1. Tests', '2. Specimen Details', and '3. Review Form'. The 'Current Requisition' section displays the following information:

- Patient:** Becker
- Vet:** Avimark One
- Staff:** Avimark One
- Tests:** 4035 Urine Culture and MIC Susceptibility*

The selected test is '4035 - Urine Culture and MIC Susceptibility*'. The specimen requirements are: '5 mL urine in a sterile container (cystocentesis preferred), Do not submit samples in SST or RTT that contain clot activator.' The turnaround time is blank.

There are two dropdown menus for collection methods:

- Urine Collection Method *:** Free-catch (selected). Notes/Other: [text input]
- Select Micro Source *:** Urine (selected). Notes/Other: [text input]. Urine Source: Free-catch (selected).

The 'Notes & Instructions' section is titled 'Notes & Instructions' and contains a 'General Information' sub-section with the following fields:

- Requisition ASAP
- Fax results to additional number: 1-573-223-4306
- For comparison to relevant samples previously submitted to IDEXX labs:
 - Previous Requisition Date: [text input]
 - Previous requisition description: [text input]
- Clinical history, signs and notes on patient: patient is currently taking Amoxicillin.

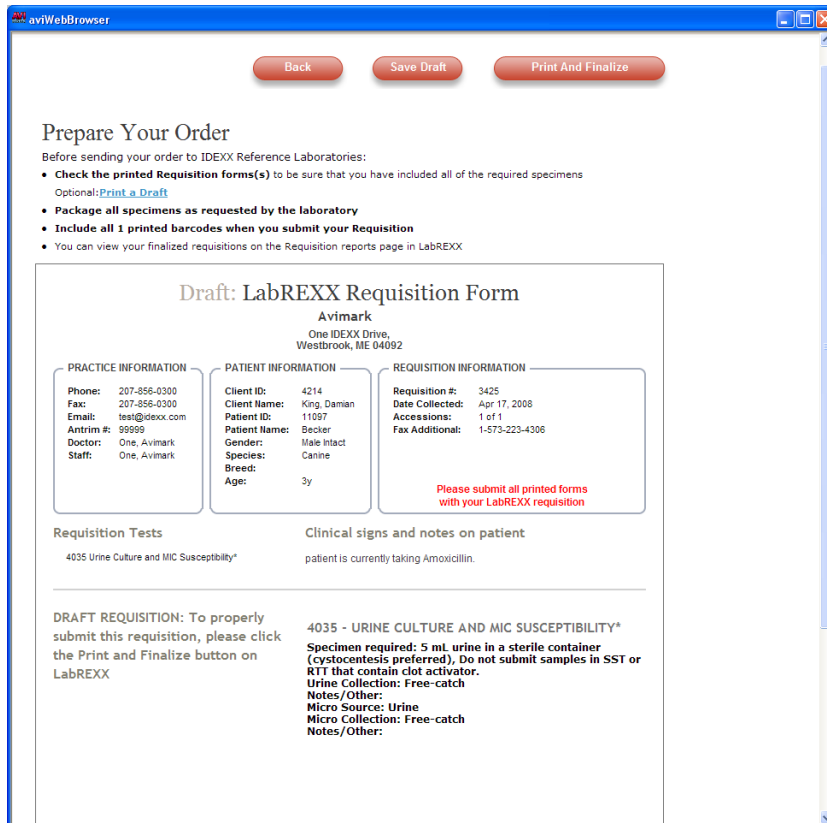
At the bottom of the form are three buttons: 'Back', 'Save Draft', and 'Next'.

- You have the ability at this point to continue on by clicking Next, or Saving the Draft to be continued at a later time.
- When you click **Next** you will be taken to the third section, **3. Review Form**.
- In this section you can verify that all the information is accurate, all the proper tests have been

requested, and Print and Finalize the Requisition Form. You also have the ability to Save a Draft at this point, or go Back if there is some information missing or changes that need to be made before finalization and printing.

Print and Finalize

- Once you have verified that the Requisition Form has all the appropriate information, you can click on the **Print and Finalize** Button and you will have your printed Requisition Form to send along with the appropriate samples to the lab for testing.



Note: If at any time during the LabREXX process, you need to save your requisition to come back and complete at a later time, you can do so by clicking on the Save Draft option, then close the window. This will save your work up to that point so you can pick it back up where you left off.

- To access the saved Draft, simply **right-click** in the patient area of the AVImark CID screen, select **Interfaces, IDEXX LabREXX**. Select the Retrieve Requisition Tab. A list with all currently saved drafts will be displayed. Simply scroll through the list of Drafts, find the desired draft, select it, and click on the **Retrieve** button. This will take you into the saved draft where you can continue with the requisition process.
- Upon Clicking **Print and Finalize**, the requested test will be entered into the patient’s Medical History. If the requested test does not currently exist in your AVImark Treatment List, it will be created. You will receive a message indicating a new treatment has been added.
- Clicking **OK** to this message will open the AVImark New Treatment window, where you can assign your desired clinic information such as Price, Action Code, Discount Classes, etc. and the newly added Treatment will be placed into the Medical History.



- These Treatment List entries will be assigned to a new Treatment Category called **IDEXX LabREXX Treatments**. If this category does not currently exist, it will be created. If this category already exists, then the new treatments will be added to the existing Treatment Category.
- If you would prefer to create the Treatment Category and add all the possible IDEXX® LabREXX treatments prior to the first Print and Finalization of a LabREXX code, you have the option of creating the category and populating it all with a single click. With this option you can set your customized treatment information for each new treatment prior to the first IDEXX® LabREXX use. This can be accomplished by opening the AVImark Treatment List, going to **Import Treatments**, Import IDEXX® LabREXX Treatments.
- This will create your IDEXX® LabREXX Treatments category, and populate it with all the possible tests set up as new treatments. You will be prompted for each treatment to enter the desired price, action code(s), species, etc, then when you click OK, you will be presented with the next New Treatment window, this will continue until all the new treatments have been added.
- You are now ready to define and import your test results for the appropriate treatment/patient when the results are received via your normal AVImark/VetConnect® interface.

Interface with the Forcyte®

AVImark will allow importing of Forcyte® test result data. AVImark lets you collect data from the Forcyte® machine and input the data directly into the patient's medical history.

AVImark settings

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab and select the **Instrument** tab.
- Select **Forcyte®** from the list of Lab Instruments.
- From the **Instrument on** dropdown list, select the correct Comport you are using.
- Using the **Baud Rate** dropdown list, select **9600**.
- Use the **Data Bits** dropdown list and select **8**.
- Use the **Parity** dropdown list and select **None**.
- Use the **Stop Bits** dropdown list and select **1**.
- Click **Done** to save the settings.

Define test result fields

- From your Treatment List, select the correct treatment. Right-click and from the shortcut menu click **Change** to display the Change Treatment window.
- In the **Attachments** section, select **More Stuff** to display the Define More Stuff window.

OR

- Select the correct treatment from the patient's Medical History.
- Right-click and from the shortcut menu point to **More Stuff** and click **Define Fields**.
- On the **Work With** menu, click **Forcyte®**.
- You will need to click **Yes** to confirm. A message will be displayed at the bottom of the Define More Stuff window indicating it is connecting to Forcyte®.
- Run the test on the Forcyte®. After approximately 5 minutes the fields will be automatically defined.
- It is recommended that you define **Normals** at this time.

Data import

- Enter the correct treatment code into the patient's Medical History.
- With the treatment highlighted in Medical History, right-click and from the shortcut menu point to **More Stuff** and click **Enter Data**.
- On the **Work With** menu, click **Forcyte®**.
- You will need to click **Yes** to confirm and proceed.
- Run the test on the Forcyte®. After approximately 5 minutes the results will import into the correct data fields.

Interface with Antech®

AVImark gives you the ability to import test results that are downloaded from the Zoasis® Corporation's website (zoasis.com). You will first need to download your test results from Zoasis®. The data will be in the form of an XML file and can be downloaded to any entry in Medical History.

Setup

Before using Antech® some options must be defined.

- On the CID click the **Hammer, Wrench and Screwdriver** speed bar icon to open the Advanced Options.
- In the **Search** field, type **Antech®**.
- If already using Antech® with AVImark the **Antech® ID Number, Password, User Name and Zoasis ID Number** will already be defined. You will need to define the **Region** information.
- Additional Antech® options can also be defined if appropriate.
- Click **Done** to save the setting.

Species and Breed Table Information

Species Table

Each species in the Species Table will need to have the corresponding Antech® Species Code assigned as designated by Antech®. Should you need help identifying the appropriate species code contact Antech®.

- From the CID **Work with** menu select **System Tables**.
- Choose the **Species Table**, highlight the appropriate species and from the right-click menu select **Change**.
- In the **Antech® Species** field enter the appropriate Antech® Species Code.

Breed Table

To allow the current AVImark breeds to be linked to the Antech® established breed list, there is the ability to

assign a breed association between AVImark and Antech®.

- From the CID **Work with** menu select **System Tables**.
- Choose the **Breed Table**, highlight a breed and from the right-click menu select **Change**.
- Click on the **Antech® Breed** drop-down list to choose the Antech® Breed.
- An Antech® breed can also be associated at the time the Requisition is being created. If no Antech® breed is associated with the breed a message will be displayed and clicking **OK** will allow you to make an association.

Treatment List Laboratory Associations

In order to use Antech® the desired Antech® tests must be associated to the treatment in the Treatment List.

- From the CID **Work with** menu select **Treatment List**.
- Choose the appropriate treatment and from the right-click menu select **Change**.
- Click the **Laboratory** tab and then the **Labs** sub-tab.
- While in this tab select **New** from the right-click menu.
- From the **Lab Company** drop-down list choose the appropriate lab for this treatment.
- This will assign the **ID** and if it is a **Pathology/Cytology** request place a check in the box provided.

Creating Lab Requisition

Generating requisitions can be performed from more than one area.

Patient Area

- While highlighted in the **Patient** area right-click and from the shortcut menu select **Create Requisition**.
- Select Antech® as the **Lab Company**, highlight the desired test from the list provided and press the **Spacebar** to make the selection.
- Choose a **doctor** and the selected test(s) will be added to Medical History.
- This entry will be the entry that will receive the imported test results.

Medical History Area

- From the Medical History area select the desired entry.
- Right-click and from the shortcut menu select **Create Requisition**.
- Choose Antech® as the **Lab Company**, select the test and choose a doctor.

Automatically

- If a treatment has an assigned Antech® Lab Company and Order Code a requisition will automatically be created when it is entered into Medical History.

Printing Requisitions

Before printing requisitions define the default printer under Utilities, Printer Setup from the CID menu area. When an Antech® requisition is generated the form will automatically prompt for printing if the Advanced Option to Automatically Print Requisitions is set to True.

Requisitions can also be manually printed.

- From the CID **Work with** menu select **Requisition Management**.
- Find and highlight the requisition that represents the sample you are sending for analysis.
- From the **File** menu select **Print, Print Requisition** or right-click and from the shortcut menu select

Print, Print Requisition.

Download Results

The test results will automatically be transmitted and stored to the proper Medical History record of the patient for which the test was requested when the requisition was created through AVImark. In the event that some results are missing some or all of the identifying information that allow automatic transmission of the results to the history record, the requisition and results will be accessible from the Requisition Management area where they can be selected, viewed and manually attached to the appropriate history record.

- From the CID **Work with** menu select **Requisition Management**.
- Once inside the window select the **Download Requisitions** tab.
- Choose **Antech®** as the **Lab Type** and click **Load**.

The results will be automatically imported into the Test Results area of the Medical History area in AVImark.

Import Results

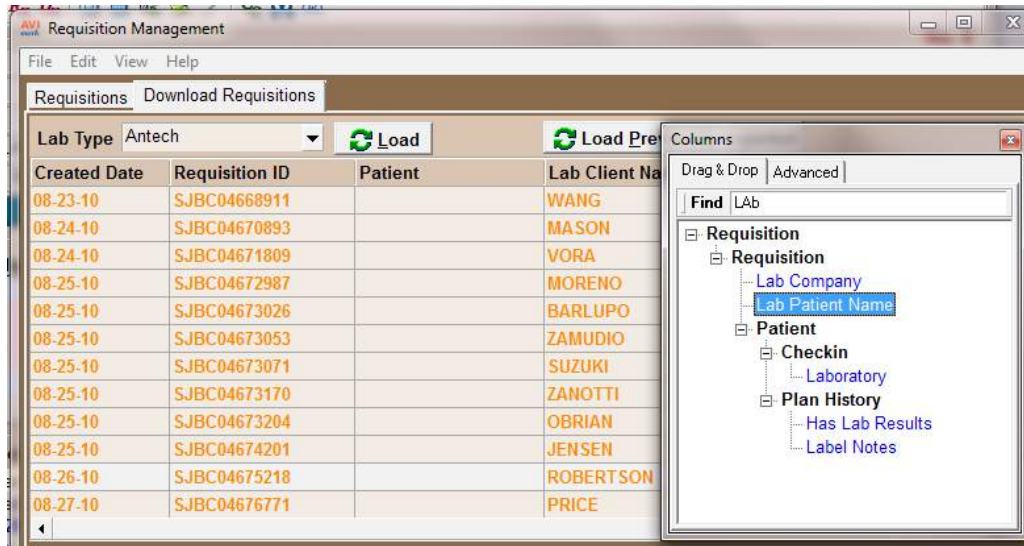
Results will be automatically downloaded and transmitted into the proper Medical History entry as long as all the identifying requisition information is in place. Should there be an instance where the appropriate Medical History record cannot be located or the treatment does not yet exist in the patient's Medical History, you can add the treatment and bring in the results in one step.

- From the CID **Work with** menu select **Requisition Management** and click the **Download Requisitions** tab.
- From the **Lab Type** select **Antech®** and click **Load**.
- Locate and select the desired requisition, verify the lab associated to each test on that requisition you wish to import, then right-click on each test and click **Select Lab**.
- The Lab Selection Form will display allowing you to choose the AVImark treatment that represents the Antech® test. Click **OK**.
- Once all lab selections are set, and black in color, you will right-click on the requisition and select **Import Results**.

View Client and Patient Names for “Orphaned” Antech® Results

To allow client and patient names to be displayed as they are on the result file return from the lab, drag out Lab Client Name and Lab Patient Name by following these steps:

- Right-click in top pane of the Download Requisitions tab
- Select View, Columns
- Enter Lab in the Find field
- Drag out the Lab Client Name and/or the Lab Patient Name



This will add the appropriate AVImark treatments to Medical History as well as assign the test results to that entry.

Viewing Imported Results

- In the patient’s Medical History select the appropriate entry and click the **Tests** box under the Attachment area.
- Select the entry in the Tests window that represents the set of results you wish to view and **double left-click** to open the Analytes window.
- This window will display the Analytes, Measure, Result, Low Value, High Value, as well as the Quick Chart indicating where the result value falls in comparison to the High-Low Range.
- If the result falls outside the normal range the line representing the result for that analyte will be displayed in bold red.
- The columns can also be customized to meet your clinic’s preference.

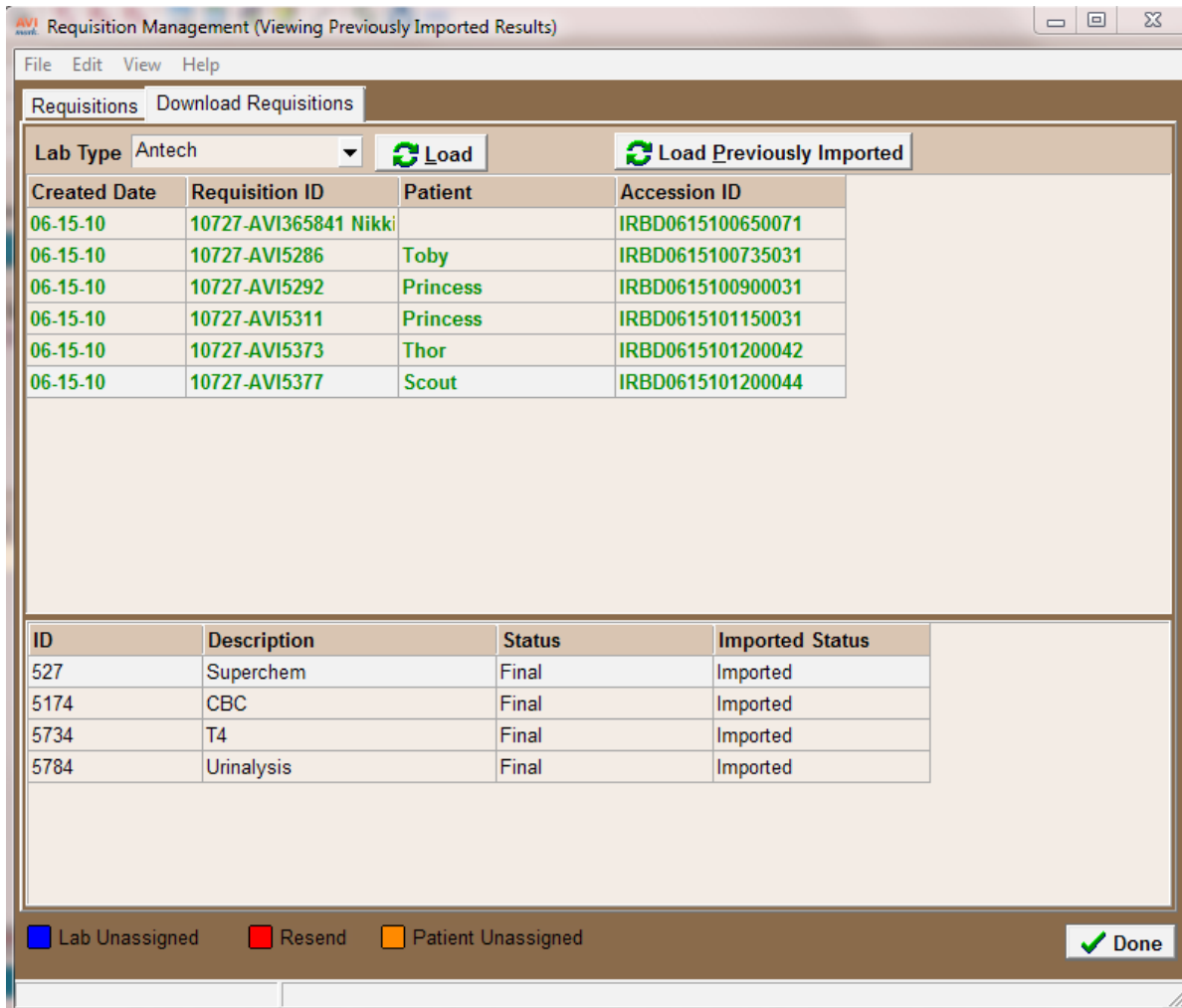
Graphing Results

- In the Tests window of Medical History **double left-click** on the test to open the Analytes window.
- Highlight the appropriate line entry, right-click and from the shortcut menu select **Graph, By Treatment** or **Graph, By Field Name**.

The result values can be graphed using AVImark or Excel.

Results that currently exist in More Stuff values will not be affected by the new Antech® update so those results can still be graphed directly from the More Stuff window.

Printing Results



There are two methods for printing patient test results.

Patient Chart

- From the Patient area right-click and from the shortcut menu select **Chart**.
- Under the **Include** area select **Tests** to include stored result data.

AVImark Results Report

- From the Medical History area select the appropriate entry and click the **Tests** option under the Attachment area.
- Highlight the test you want to report and from the File menu click Print.

Antech® XML Result Storage

When loading results using the “Load” button in the Requisition Management window, all available test results will be downloaded from Zoasis and stored in individual XML files in a new directory. Acknowledgement of results will be automatic at the time of download and no longer repeatedly load the same set(s) of test results until the time they are imported to patient records. Results that have been imported to an AVImark patient record will be stored in a different new directory. These imported XML files will be automatically deleted after 45 days.

The above described directories will be automatically created within the AVImark folder. These directories are:

- **Antech® Requisitions** – This folder will be created directly within the AVImark directory and contain all downloaded result XML files that have not yet been imported to an AVImark patient record.
- **Imported Results** – This directory will be automatically created directly within the Antech® Requisitions directory. All results will be transferred from the Antech® Requisition folder to this location upon being imported to a patient record. The XML files will reside at this location until 45 days have passed, at which time they will be automatically deleted. This automatic file deletion will help prevent the folder from becoming unnecessarily large.

****Important:** These folders should not be renamed, moved, or deleted. There are no options to allow file name or location changes. When not found, these directories will be automatically recreated each time the “Load” button is pressed from within the Requisition Management window.

A new button has been added to the Download Requisitions tab in the Requisition Management window. The **Load Previously Imported** button will allow users to load results that have already been imported to a patient record for viewing or importing. This feature will make it unnecessary to move a previously imported set of results manually from the Imported Results folder to the Antech® Requisitions folder to be viewed or re-imported. When previously imported results have been loaded, the requisitions will be displayed in green to allow an “at a glance” determination of the import status as well as (Viewing Previously Imported Results) in title bar.

Work with Requisition Management

The Requisition Management area is a centralized location to monitor, control, access, download and view lab results from any AVImark labs; containing in-house and reference laboratory information.

- From the **CID Work with** menu select **Requisition Management**.

Using Requisition Management

Requisitions Tab

This tab contains status information on all laboratory requisitions. From this tab you can select the lab(s) and date range for any lab requisition information. You can collect detailed requisition information regarding patient, created date, Lab Company, status, etc. This area also allows column customization.

Download Requisitions Tab

- From this tab select the **Lab Type** drop-down list to select a lab service and click **Load**.
- This will poll the Antech®/Zoasis site for any lab results for your hospital and display them.
- If the requisition is matched to an entry in Medical History the results will be downloaded directly to that entry.
- The top pane will display the Created Date, Requisition ID, Patient, Lab Company and Accession ID.
- When a requisition is selected in the top pane, the tests associated to that requisition will be displayed in the lower pane. This will display the Test ID, Test Description, Test Status and Imported Status. Columns can also be customized in this tab.

Interface with VetConnect®

AVImark allows you to import test results that are downloaded from the VetConnect® website. The data will be in the form of an RTW file and can be downloaded to any folder on your network. A good location might be a sub-folder of the AVImark directory. In order to utilize the AVImark VetConnect® interface, you must be on version 174 or higher with a created date of 11/11/04 or above.

File set up

The first setup requirement entails the installation of a program developed by IDEXX® used to download your test results. This download module is a program initialized by AVImark and consists of two files; VCAgent.jar and Parser.exe. AVImark will install these files for you automatically upon installation, in a sub-folder named VetConnect®.

Program installation

In order to download test results you will need to install a Java Runtime program. This program is required by the IDEXX® download module and must be installed on each computer you will be downloading test results on. AVImark technical support cannot provide technical support assistance with the installation of this program, but will provide you with written instructions on downloading and installation of this program as a courtesy to VetConnect®.

AVImark settings

The last setup requirement is to obtain a user name and password from IDEXX®. This information will be entered into Hospital Setup, along with the file download directory, and allows you access through the IDEXX® download program to their website. Your user name and password may be requested by sending an email to lablink@IDEXX.com. When creating your email be sure to include the following information: Hospital name, Phone number and a request for user ID and password to be used to download test results from VetConnect®.

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Select the **System** tab.
- Select the **Laboratory** tab.
- In the **VetConnect® Login** section, type the **Username** and **Password** as issued from IDEXX®.
- Select the **Advanced tab** and click **Advanced Options** to display the Option Maintenance window.
- Click **Yes** to the prompt to save the settings already made.
- In the Search field, type **Vet Connect** and click **Download Test Results To**.
- In the **Default Value** field, click **Change** and type the location and name of the directory you have created for your VetConnect® RTW files. If this is a subdirectory of the AVImark folder, you may type VetConnect® since this folder has already been created for you.
- D code in the Change Treatment window.

Data import

Importing test results may be done in three different ways; Individual test, Accession, or RTW file.

Import individual test

- Select the correct treatment in the patient's Medical History.
- With the treatment highlighted in Medical History, click the **Tests** attachment option to the right.
- From the **Import From** menu select **VetConnect**.
- Select the correct **RTW** file from the left-hand side.
- Select the correct **patient** to import to and select the correct **test**. The test should display a green light indicating that it has found the test in Medical History and that the fields have been defined.
- With the correct test highlighted right-click and from the shortcut menu point to **Import** and click **Test**.
- Click **Done** to return to the Tests window.

Import by Patient

Importing by Accession will import all tests for a patient at one time. It does not have to be done from the patient the results belong to or the client the patient belongs to. You will need to ensure that the treatments are in the patient's Medical History prior to importing.

- Select the correct treatment in the patient's Medical History.
- With the treatment highlighted in Medical History, click the **Tests** attachment option to the right.
- From the **Import From** menu select **VetConnect**.

- Select the correct **RTW** file from the left-hand side.
- Select the correct **client** and **patient** name.
- To ensure the results are imported to the correct client/patient, right-click and from the shortcut menu click **Choose** to display the Client Selection window.
- After choosing the correct client and patient, click **Continue** to return to the VetConnect® Lab Reports window.
- With the correct client/patient name highlighted, right-click and from the shortcut menu point to **Import** and click **Patient**.
- You will receive the message “Test results imported”, click **OK**.
- Click **Done** on the VetConnect® Lab Reports window.

Import by RTW file

Importing by RTW file will import all test results for all clients and patients at one time once the data fields are defined. It is similar to importing by Accession in that the importing does not have to be done from the client or patient the results belong to; however, you will need to ensure that the treatments are in the patient’s Medical History prior to importing.

- Select the correct treatment in the patient’s Medical History.
- With the treatment highlighted in Medical History, click the **Tests** attachment option to the right.
- From the **Import From** menu select **VetConnect**.
- Select the correct **RTW** file from the left-hand side.
- For each client/patient name you wish to import for, right-click and from the shortcut menu click **Choose** to display the Client Selection window. The correct client/patient name should be displayed, click **Continue** to return to the VetConnect® Lab Reports window.
- Select the top line on the right-hand side where the date and RTW file is listed. A green light should display next to those clients/patients which were chosen. A green light will also be displayed next to those tests which were found in Medical History.
- Right-click and from the shortcut menu point to **Import** and click **File**.
- You will receive the message “Test results imported”, click **OK**.
- Click **Done** on the VetConnect® Lab Reports window.



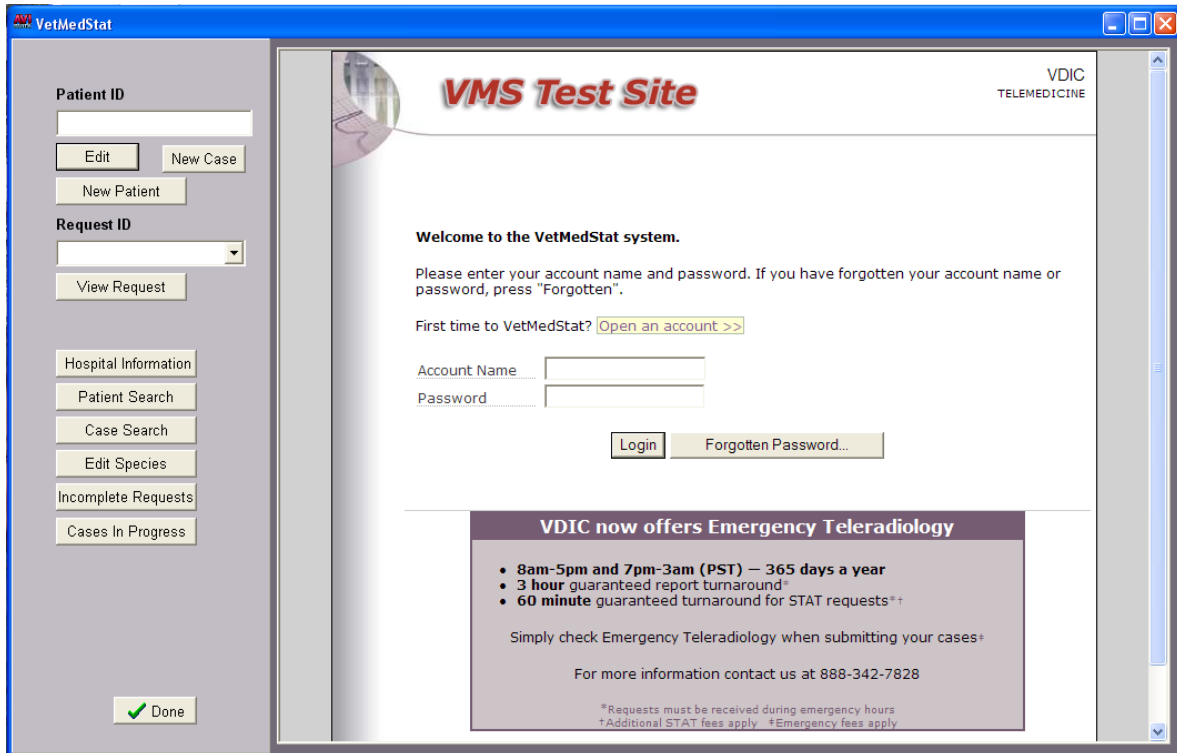
Tests which display a yellow light indicate that they have been defined and imported already. A red light displayed next to a test would indicate that the test was not found in Medical History or possibly the VetConnect® ID code is incorrect. A patient’s name which is displayed in red normally indicates that the spelling of the name in AVImark is different then that on the RTW file from VetConnect®.

Interface with VDIC® VetMedStat Telemedicine

AVImark has the ability to access VDIC’s Telemedicine Services website directly from within the program to allow easy online access to radiology, ultrasound, cytology, and telemedicine consultation. There is nothing to install.

AVImark Access

- In the Patient area choose **right-click Interfaces, VetMedStat**.
- The VDIC website will be displayed assisting new users in setting up a Telemedicine account, or submitting a Telemedicine request.



Once you have opened your VetMedStat account and received your Account Name and Password provided by VDIC®, you can enter that information into AVImark’s Advanced Options.

- From the CID click the **Advanced Options icon** (hammer, wrench, screwdriver icon)
- Type **VetMedStat** in the Search field.
- Enter the assigned Account Name into the **VetMedStat User ID** field, and the assigned password into the **VetMedStat password** field. Assigning this information to the corresponding Advanced Option field will allow you to automatically be logged into the site upon opening through AVImark. If you prefer to not be automatically logged into the VDIC® site, you can simply skip the step of entering the information into Advanced Options and you will be presented with the login fields upon accessing the site through AVImark.

Setup is complete, and you are now ready to begin making your telemedicine requests.

Submitting Requests

- To make a request, access the VetMedStat site and enter your Account Name and Password.
- Select the **New Patient** button.
- A patient information page will be displayed. This will automatically default to the AVImark patient and client you have selected on the CID, as well as the DOB and weight of the patient.
- You can select the **Species, Breed, and Gender** that applies to this patient and click **OK**.
- This will take you to the Request Form where you can make your Telemedicine Requests and click **Next**.
- You can then click on your **Category** to see and select your options and click **Next**.
- You will be prompted with a message confirming that your patient will be assigned a VMS patient ID number, click **Yes** to proceed or **No** to go back. If you click **Yes**, you will be prompted with a message confirming the Request ID number assignment for that patient. Clicking **Yes** again will allow the # to be assigned and you can proceed to complete your case. You will be presented with a window to make

your courier selection, or upload images.

- Press **Complete** when done.

VMS Test Site

Jesse's Hospital
VetMedStat™
[Home](#) [Logout](#)

Request Form

Hospital Jesse's Hospital *Date* **11/11/2008 12:02:57 PM**
Address 123 Street 1 *Tel.* 503 262 0496
City, State, Zip Gresham, OR 97030 *FAX* 503 722-7100

Patient : Toby Cravens

Species: **Dog** *Sex:* **Male** *Patient #:* **163101**
Breed: **Cocker Spaniel** *Age:* **1.6**

Services Requested [Next >](#)

(You must select at least one option.)

TELEMEDICINE SERVICES

- Radiology/Abdominal Sonography (Not for cardiology)
- Cardiology (Includes echoes/EKG/radiographs)
- Dentistry
- Internal Medicine
- Emergency Teleradiology (8am-3am PST)
- TeleEquine
- TeleOphthalmology

Requesting Veterinarian [Watson, Jesse](#)

[\[Home\]](#) [OK](#)

Patient ID
163101
[Edit](#) [New Case](#)
[New Patient](#)

Request ID
225979 - 11/11/2008
[View Request](#)

[Hospital Information](#)
[Patient Search](#)
[Case Search](#)
[Edit Species](#)
[Incomplete Requests](#)
[Cases In Progress](#)

[Done](#)

Check Status of Request

Once a request has been submitted you can easily check the status of that request.

- Access the site by selecting your AVImark patient and choosing **right-click Interfaces, VetMedStat**.
- If the patient you have selected in AVImark is already set up in the VetMedStat site, their Patient ID number will automatically be displayed in the **Patient ID** field and any associated requests will be automatically loaded in the **Request ID** drop down for quick retrieval of reports.

You also have the ability to search for the case request for patients other than the one defaulted to being listed. Case requests can be searched by using one of the following options:

- The Patient Search
- Case Search requires you to know the request number
- Searching through Incomplete Requests
- Search through Cases in Progress

You have the same search options available to you from the Home Screen of the VMS site after you have logged in.

When you have selected the desired patient, you are able to review the findings based on the request submitted as they are available.

- The Request IDs will always be displayed in the **Request ID** drop down with the most recent being first in the list for that Patient ID. This will allow easy access to previous requests for this patient.

- To review any previous results for this patient, you simply select the desired **Request ID** and press the **View Request** button.
- When you are finished reviewing request results, you can exit the site by either clicking **Done** or simply choosing the red **X** in the top right of the window.

Interface with Vmed® Technology

The Vmed integration allows for specific client/patient data to be pulled from within AVImark and automatically populate the Vmed “Patient Episode File” within the PC Display software. This software is used in conjunction with Vmed’s PC-Vetgard and PC-Vet wireless monitors for the purpose of storing patient monitor parameters and ECG waveform data.

Register the AVImarkCOMServer.dll File

You must first register the appropriate dll file to begin using the Vmed Technology within AVImark.

- From the AVImark CID screen press **Ctrl+Shift**
- While pressing those function keys select the **Utilities** menu
- Additional options will appear and you will need to select **Register, AVImarkComServer.dll**.

You will then be able to select the desired AVImark client and patient from the CID and populate the PC-Display software after the Bluetooth connection is established. This will further allow you to save, print and review episode information in the PC-Display Software as well as the ECG Reviewer software that will include the AVImark client and patient specific information.

Abaxis® i-STAT Integration

AVImark users will have the ability to import results from the Abaxis® VetScan i-STAT Handheld Analyzer with AVImark version 2011.1. Results will be transmitted to AVImark via the Abaxis CDS software installed on the AVImark workstation PC.

NOTE: Abaxis® CDS software is not compatible with Windows 7 or 64 Bit environment. CDS Setup Abaxis® CDS software must be installed on an AVImark workstation and configured to the proper interface protocol for data type record transmittal as well as designating the proper folder path for result records. Information for making these settings can be found in the CDS Software Users Manual.

AVImark Instrument Management Setup

The Instrument Management area of AVImark will need to be configured to retrieve and import results from the i-STAT via the CDS software.

- Select Work With Instrument Management.
- Right-Click, select New, or use F2 to open a new Instrument Setup window.
- Select Abaxis CDS in the Type field.
- Your Computer ID and Protocol should be automatically populated with the proper information.
- Make sure the Active option is checked.
- Select Next to set your paths for your result folders.
- Instrument Results Path should be the full path to the same location used for the Data Files Path setup in the i-STAT CDS Interface Options in the CDS software. This will be the location AVImark will look to for results to be imported.
- AVImark Results Path should be the full path to the folder location you wish to have result files deposited after import to AVImark Medical History.
- Days to Save Imported Results will determine how many days the imported results will be stored in the AVImark Results Path location before being deleted.

Retrieving Results

Completed tests results can be selected and transmitted from the i-STAT to AVImark Medical History.

- Select the Tests Attachment for the Medical History for which you wish to import results.
- Select Import From > Abaxis CDS.
- Find and select the test you wish to import.
- In the right pane, highlight the test then right-click > Import > Test. Then Click Done.
- Your results will now be displayed in the Tests window, and the file used for import will be moved from the Instrument Results Path location to the AVImark Results Path location.

Abaxis® VetScan VSpro Integration

With AVImark version 2011.1, users will have the ability to import results from the Abaxis® VetScan VSpro. This new integration requires minimal setup and will use the existing “Run Instrument Import” utility. Connection to this instrument is supported by a TCP connection instead of the typical serial port connection.

Setup

In order to begin importing results the following steps will need to be taken to establish a connection between AVImark and the VSpro instrument. From the AVImark workstation you wish to use for communication:

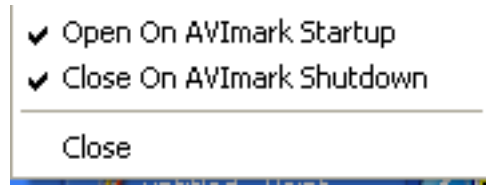
- Select Instrument Management from the Work With menu on the CID to open the Instruments window.
- Open a new Instrument Setup window by F2, or right-click, New.
- Select Abaxis VetScan Pro from the available drop down list.
- The Name, Computer ID, and Protocol, fields should automatically be populated with the proper information once the instrument has been selected.
- Place a check in the Active box if not already defaulted to being checked.
- Select Next to enter the Host IP address. This Host IP will be the IP address of the AVImark workstation you are using.
- The Port can be left as defaults (to 33333).
- Clicking Finish completes the instrument setup.

NOTE: It will also be necessary to enter this AVImark workstation IP address on the VSpro instrument. You can assign the VSpro to the Instrument Types tab for the appropriate AVImark treatment.

Importing Results

Importing test results can be accomplished through use of the Instrument Import utility. The utility is much the same as in previous AVImark versions.

- The utility can be found by accessing Utilities, Run Instrument Import.
- This utility is now set up to automatically start when AVImark starts, and has the option to Close on AVImark Shutdown.
- When AVImark opens you will see the “shaking hands” icon located in the System Tray of your workstation. This indicates that AVImark is in communication with the instrument(s) assigned to communication ports on this computer, and is “listening” on each port for any incoming data.
- The options to Start when AVImark opens, and Close on AVImark Shutdown can be controlled by right click options on the icon in the System Tray.



NOTE: If you have de-selected the Close on AVImark Shutdown option, please note you will need to manually close the connection utility prior to index rebuilding or any other maintenance utility that requires exclusive access to AVImark files.

When a treatment with an instrument assignment is entered into Medical History for a patient, AVImark will start listening to the ports in which the associated instruments are assigned for results. As results are ready to be transmitted, AVImark will import the results to the proper Medical History entry. If the proper Medical History cannot be located, the results will be sent to the new “Test Inbox” to await manual import.

- First, the import utility looks for a patient with a record number that matches the “Patient ID” field received from the instrument.
 - The Patient ID that is being searched for a match is the AVImark Patient ID.
 - When running the test on the designated analyzer, and prompted for a patient identifier, the AVImark Patient ID is the number that will allow the utility to make the proper patient association for automatic result import.
 - If this is successful, then the recent medical history of that patient is searched for a recorded treatment that is set to store results from the instrument.
- Once the patient identifier is located on the incoming results, the utility will begin searching for a Medical History entry for that patient that is awaiting results.
- When that Medical History entry is located, the results will be automatically imported into the Tests Attachment area.
- If the Patient ID doesn’t match or exist or there is no matching Medical History entry on that patient awaiting results, the test results are placed in the “Test Inbox.”
- To manually import the results that were sent to the Test Inbox, simply highlight the Medical History entry you wish to import results for, select the Tests attachment, Import From, Test Inbox. Here you will be presented with a list of results that were transmitted from instruments that did not find the Medical History entry to complete the automatic import. Select the set of results you wish to import to this history entry, and click Done.
- When you “Import from” the Test Inbox, the record is actually moved from the Test Inbox onto that Medical History entry. This will allow the Test Inbox to only contain results that have not been imported to Medical History.
- As an additional safety measure to ensure no results are lost, an RX\$ file is also created with the transmitted results. This RX\$ file is sent to the user defined Instruments storage folder. This path to this storage folder will need to be set in Advanced Options. Select the “Save Lab Instrument results To” entry and assign the path to your storage folder. If you are currently using AVImark to retrieve your results, you likely already have this in place.
 - Results can be imported from this location if needed by opening the Tests attachment, select Import From, Stored Tests. This will display all stored RX\$ files on the left pane. You can select the RX\$ file that holds your test, move to the right pane, select the test, right-click Import Test.
- In the case of an emergency, where access to results is immediately needed, right click on the treatment in Medical History that has the lab instrument association that represents the test instrument being used, and select Import Results. This will open the Associated Instruments window displaying a list of associated instruments for this treatment. Place a check in the box that represents the instrument from you wish to receive results, click the Import Results button, and AVImark will begin listening

to these ports. As the data is sent from the instrument via the port, AVImark will capture and place it immediately in the Test Results window. After the results are received, the Import Results window will disappear, and you can view the results by selecting the Tests attachment option for that Medical History entry.

NOTE: To alleviate the chance of sending results automatically to the wrong Medical History record that may also meet the requirements for automatic import selection we have incorporated a two day time frame to use for searching, then selecting the oldest entry in that time frame for which these results would apply, to make the result attachment. To summarize, the utility will look for that patient record, then start at the farthest date/time as dictated by the two day time frame, and apply it to the first one it finds....versus starting with the most recent and looking back.

Scil Vet abc Plus+ Integration

Results from the scil Vet abc Plus+ can be transmitted to Medical History with AVImark version 2011.1. Results can be captured and automatically imported into patient records with minimal user intervention.

Setup

This feature will use the new Instrument Management area for making your connection settings. To begin setting up AVImark to retrieve results:

- Select Services, Instrument Management
- Open a new Instrument Setup window by F2, or right-click, New.
- Select Scil Vet abc from the available drop down list.
- The Name, Computer ID, and Protocol should automatically be populated with the proper information once the instrument has been selected.
- Place a check in the Active box if not already defaulted to being checked.
- Select Next and choose the appropriate Com Port. The Baud Rate should be set to 19200. The Port can be left as defaults (to 33333).
- Clicking Finish completes the instrument setup.

You can now assign the Scil Vet ABC to the Instrument Types tab for the appropriate AVImark treatment in the Change Treatment window, Laboratory tab, Instrument Types subtab.

Use

Importing test results can be accomplished through use of the Instrument Import utility. The utility is much the same as in previous AVImark versions.

- The utility can be found by accessing Services, Run Instrument Import.
- This utility is now set up to automatically start when AVImark starts, and has the option to Close on AVImark Shutdown.
- When AVImark opens you will see the “shaking hands” icon located in the System Tray of your workstation. This indicates that AVImark is in communication with the instrument(s) assigned to communication ports on this computer, and is “listening” on each port for any incoming data.
- The options to Start when AVImark opens, and Close on AVImark Shutdown can be controlled by right click options on the icon in the System Tray.

** Important NOTE: If you have de-selected the Close on AVImark Shutdown option, please note you will need to manually close the connection utility prior to index rebuilding or any other maintenance utility that requires exclusive access to AVImark files.

When a treatment with an instrument assignment is entered into Medical History for a patient, AVImark will start listening to the ports in which the associated instruments are assigned for results. As results are ready to be transmitted, AVImark will import the results to the proper Medical History entry. If the proper Medical History

cannot be located, the results will be sent to the “Test Inbox” to await manual import.

- First, the import utility looks for a patient with a record number that matches the “Patient ID” field received from the instrument.
 - The Patient ID that is being searched for a match is the AVImark Patient ID.
 - When running the test on the designated analyzer, and prompted for a patient identifier, the AVImark Patient ID is the number that will allow the utility to make the proper patient association for automatic result import.
 - If this is successful, then the recent medical history of that patient is searched for a recorded treatment that is set to store results from the instrument.
- Once the patient identifier is located on the incoming results, the utility will begin searching for a Medical History entry for that patient that is awaiting results.
- When that Medical History entry is located, the results will be automatically imported into the Tests Attachment area.
- If the Patient ID doesn’t match or exist or there is no matching Medical History entry on that patient awaiting results, the test results are placed in the “Test Inbox.”
- To manually import the results that were sent to the Test Inbox, simply highlight the Medical History entry you wish to import results for, select the Tests attachment, Import From, Test Inbox. Here you will be presented with a list of results that were transmitted from instruments that did not find the Medical History entry to complete the automatic import. Select the set of results you wish to import to this history entry, and click Done.
- When you “Import from” the Test Inbox, the record is actually moved from the Test Inbox onto that Medical History entry. This will allow the Test Inbox to only contain results that have not been imported to Medical History.
- As an additional safety measure to ensure no results are lost, an RX\$ file is also created with the transmitted results. This RX\$ file is sent to the user defined Instruments storage folder. This path to this storage folder will need to be set in Advanced Options. Select the “Save Lab Instrument results To” entry and assign the path to your storage folder. If you are currently using AVImark to retrieve your results, you likely already have this in place.
 - Results can be imported from this location if needed by opening the Tests attachment, select Import From, Stored Tests. This will display all stored RX\$ files on the left pane. You can select the RX\$ file that holds your test, move to the right pane, select the test, right-click Import Test.
 - In the case of an emergency, where access to results is immediately needed, right click on the treatment in Medical History that has the lab instrument association that represents the test instrument being used, and select Import Results. This will open the Associated Instruments window displaying a list of associated instruments for this treatment. Place a check in the box that represents the instrument from you wish to receive results, click the Import Results button, and AVImark will begin listening to these ports. As the data is sent from the instrument via the port, AVImark will capture and place it immediately in the Test Results window. After the results are received, the Import Results window will disappear, and you can view the results by selecting the Tests attachment option for that Medical History entry.

****Important NOTE:** To alleviate the chance of sending results automatically to the wrong Medical History record that may also meet the requirements for automatic import selection we have incorporated a two day time frame to use for searching, then selecting the oldest entry in that time frame for which these results would apply, to make the result attachment. To summarize, the utility will look for that patient record, then start at the farthest date/time as dictated by the two day time frame, and apply it to the first one it finds....versus starting with the most recent and looking back.

CHAPTER 34: AVIMARK SITE SUPPORT

Site support is designed for hospitals with more than one location (satellite/remote hospitals) yet want a centralized database. Each location shares the same database of clients while having the opportunity to maintain their own unique Treatment, Inventory List, Appointments and Reporting. To do this, AVImark lets you assign what is called a “site number” to each of your Medical History and Accounting records, Treatment and Inventory lists including purchase orders, appointments and block-offs, as well as hospital staff. To use AVImark Site support, you will need to purchase a copy of AVImark for each central and satellite locations.

In this chapter you will learn about...

- » Set up Site Support on page 401
- » Set up Users and Security on page 401
- » Work with Site Manager on page 402
- » Choose a Treatment and Inventory List on page 403
- » Change Site Options on page 404

Set up Site Support

In order to take advantage of the site feature in AVImark, there are some hardware/software requirements which must be met. A remote connection must be established between satellite clinics and the home office. This is most commonly accomplished by using the Terminal Services feature of Microsoft Windows® 2000 Server or Microsoft Windows® Server 2003 Standard, Enterprise, or DataCenter Editions. Once the necessary connections have been established, you will need to obtain a copy of a site file from us. This file contains the encrypted names and addresses of the businesses which will be using AVImark. For assistance in obtaining and installing the necessary file, contact our Technical Support at 877-838-9273.

Central hospital requirements:

From the central hospital you must have Windows® 2000 Server Edition or Windows® 2003 Server Standard, Enterprise, or DataCenter Edition on a dedicated server. In addition, Windows® Terminal Services “Server” software must be installed on the server computer.

Satellite hospital requirements:

At the satellite locations, each will require Windows® 98se, Windows® 2000 Professional, or Windows® XP Professional. Also, each workstation at the satellite hospitals will require Terminal Services “Client” software and a broadband/high speed, internet connection installed.



To learn more about:
Hardware/Software Requirements

Search the Help for:
Table of Contents – Site Support

Set up Users and Security

Prior to using the AVImark Site feature, there are some necessary settings which will need to be made in Users and Security. AVImark will need to identify you as a Hospital Administrator. There are a few security functions which will need to be set in order to do this. In addition, all employees from all locations will need to be added into Users and Security.

Specifying Site Location

For staff members who work at multiple sites you will want to specify the locations they are associated with.

- On the CID, open the **Work with** menu. Click **Users and Security** to display the Security Maintenance window.
- Select the appropriate user category.
- Highlight the staff member name and from the **right-click** shortcut menu select **Locations**.

- The main clinic or site will automatically be listed. If necessary remove this site by selecting **Remove** from the **right-click** shortcut menu.
- To specify the site(s) the user works at select **right-click New** from the shortcut menu.
- Use the **Site** drop-down list to select the location the user works at.
- Click **Ok**.

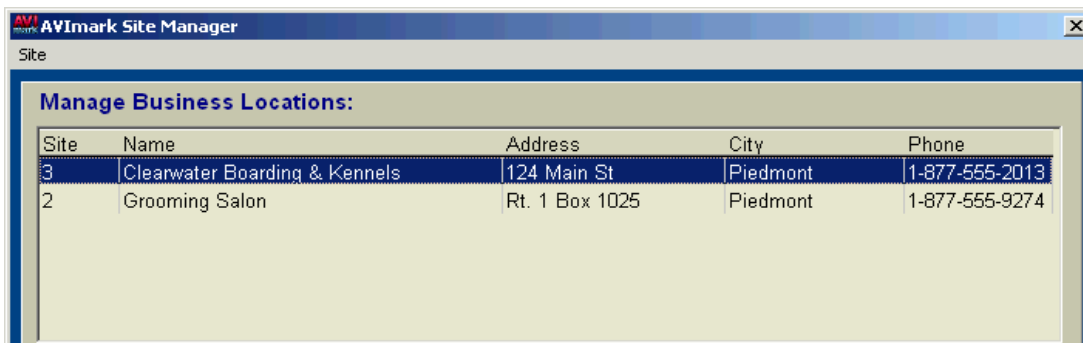
Security Functions

- On the CID, open the **Work with** menu. Click **Users and Security** to display the Security Maintenance window.
- Select **Hospital Administrators** from the **Category** section to display a list of Administrators in the User for section.
- In the **Authorized Functions** area, **right-click** and from the shortcut menu click **Choose** to display the User Function window.
- Select **System Administration** from the **Category** section.
- In the **AVImark functions for** section, select the function, **ADM01-Administer AVImark (System-wide Authority)**.
- **Right-click** and from the shortcut menu click **Select**, or use the SPACEBAR to choose the function and place in the **Selected** area.
- Choose the functions, **ADM02-Work With Users and Security**, and **ADM03-Authorize AVImark Functions to Users** in the same manner and click **Done**.
- Select your name from the Users for section. **Right-click** and from the shortcut menu click **Change** to display the Change User window.
- In the **Password** field, type a **Password**.
- Use the **Site** drop-down list and select the appropriate hospital.

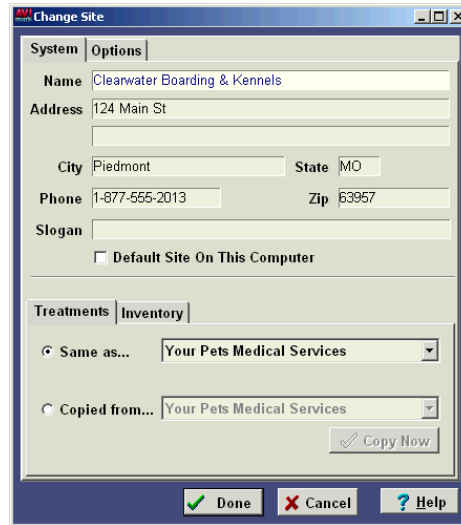
Work with Site Manager

Once the site file has been copied into the AVImark folder on your server computer, and the basic security described above has been set up, the next thing you will need to do is use the AVImark Site Manager to complete the information about the satellite hospitals or businesses listed there.

- On the CID, open the **Work with** menu. Click **Hospital Setup** to display the Hospital Setup window.
- Click **Site Manager** at the bottom of the window to display the AVImark Site Manager.



- Double left-click the hospital name you wish to work with to display the Change Site window.



- If appropriate, use the **Slogan** field and type a **Slogan** for the location you are working with.

Choose a Treatment and Inventory List

It is from the AVImark Site Manager where you will decide whether or not to share the same Treatment and Inventory List or have separate lists.

Use a common list(s)

Certain central hospital/satellite arrangements will want to use a common treatment list so that pricing, discounting, and client education documents may be standardized throughout the group of hospitals. Using this setup option, all of the hospitals will be using a common Treatment/Inventory List and changes made at one location will be instantly reflected at all locations.

- Choose the **Same as** option and use the drop-down list to select the central hospital's name.
- Click **Done**.

Modify a common list(s)

There will be certain central/satellite arrangements that will want to begin with a common Treatment List, but allow the satellite office(s) to make appropriate changes that are unique. Using this setup option, all of the hospitals will be using a treatment list that has a common origin and format (possibly common codes and descriptions) but that will be unique in other appropriate ways.

- Choose the **Copied from...** option and use the drop-down list to select the central hospital's name.
- Click **Copy Now** to copy the central hospital's list with the ability to make any necessary changes.
- After the copy process is complete, click **Done**.

Use a completely unique list(s)

In other cases, each satellite location will have its own unique Treatment/Inventory List and will therefore want to "start from scratch". In this case, there would be very little, if any, commonality between the Treatment/Inventory Lists of the central location and satellite office(s).

- For a given satellite location, choose the **Copied from...** option.
- Use the drop-down list and select the satellite hospital's name.
- Click **Done** to erase the list(s).

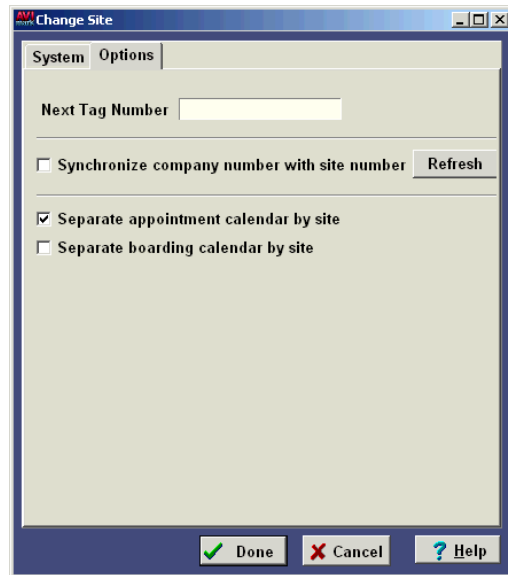


Understand that the Whogot function of AVImark will display all patients; not just those doing business with a particular location

Change Site Options

From the AVImark Site Manager window you will also make the decision whether to use separate Rabies Tag numbers, synchronize company numbers with particular site numbers, and whether to keep the Appointment Calendar separate by site.

- From the AVImark Site Manager window select the **Options** tab.



Separate tag numbers

By placing a tag number that is unique to this particular site you will be allowed separate tag numbers for each site. You will need to repeat this step for each site in your site manager.

- Type the tag number to start with for the given satellite location.

Synchronize company numbers

When the Refresh option is clicked before running statements AVImark will look at the clients' latest accounting transaction and change their company number to match. AVImark can keep track of which site each transaction was performed at but cannot run statements by site, only by company number. Before running statements, each site needs to be set up in the Company Table within System Tables. Company 1 will represent the home or central hospital; company 2 will represent site 1 and so on. If you choose you may click the refresh button before running statements to update the company number.

- If appropriate, select **Synchronize company number with site number**.
- Click **Refresh**.

Separate Appointment Calendar

You may choose to view the appointments for only the site you are logged in to or you may view appointments for all sites. With this option checked you will see only the appointments for the site you are logged in to; unchecked you will view all sites appointments.

- If appropriate, select **Separate appointment calendar by site**.
- Click **Done** when finished.



To learn more about:

Using Site Treatments & Inventory
Site Reports
Site Appointments
Site Statements

Search the Help for:

Table of Contents – Site Support

CHAPTER 35: PRACTICE ANALYSIS

The AVImark “Practice Analysis” feature provides you with the option of viewing and printing reports and graphs to help better manage your business. Each graph and report will have different restriction options available.

In this chapter you will learn about...

- » Use the Different Reports on page 407
- » Work with Graphs on page 408
- » Print, Save, Export, and/or Email Reports on page 409

- On the CID, open the **Work with** menu. Click **Practice Analysis** to display the Practice Analysis window.

Use the Different Reports

The reports that are available may be restricted by Doctor, Species, Zip Code, and/or Company. Each report will have different restriction options available. AVImark lets the user know which restriction options are available by graying out the options not applicable to the selected report.

- On the Practice Analysis window, select the **Reports** tab.
- Choose the appropriate report.
- Using the **Period** drop-down list or the **Start** and **End** drop-down calendars, select the correct period to report.
- If appropriate, select the restriction options you wish.

Top 50 clients for last 12 months

This report will list the top 50 clients with the most charges for the last 12 months. This report will include account numbers, client names, balance due, and number of visits for the last 12 months, as well as payments and charges. In addition, AVImark gives you the ability to export the Top 50 Clients information to Purchasing Services Inc. (PSI). With the Top 50 Clients report selected, the Pet Quarterly button will be visible.

- If appropriate, click **Pet Quarterly** to export the information to your hard drive or to email directly to PSI.



When exporting to PSI, the clients' balances and payment totals will not be included in the exported information. However, the client's mailing address will be included.

Top 50 Treatments Performed

This report lists the income produced from your top 50 services.

Top 50 Items Sold

This report shows the income from your top 50 items with the profit from each (retail price minus average cost). This report will not include the charges for late fees and adjustments.

Client Retention

This report shows the number of active clients at the beginning and end of a selected period, plus the number of new clients added during this time frame. It also shows the number and percentage of clients counted as lost during the selected time frame, along with the percentage of clients retained. When selecting a time frame, you will specify a date in the “Invoices After” field to determine what period you would like to define active clients. When setting the “Invoices After” date, make certain the date is a prior to the specified Start date. If it is not, the report will not be able to determine the number of active clients at the beginning of the period.

Months to Compare Considerations

When using the “Months to Compare” option, make certain that the selected “Period” is not set to greater than a month. The “Months to Compare” option will only be able to accurately compare the current information to past information if the “Period” is set to a month or less than a month. If the “Period” is set to a week and the “Months to Compare” is set to 3, the “Period” will be compared to that time frame on the selected number of months. For example: Period is set to June 3rd through June 10th; Months to Compare is set to 3. April 3rd to the 10th and May 3rd to the 10th will be compared to June 3rd to the 10th.

Years to Compare Considerations

When using the “Years to Compare option”, the “Period” may be set to more than a year. The “Years to Compare” option is able to compare the results of the “Period” to the same “Period” for the selected number of years. For example: Period is set to January 1, 2008 through June 30, 2009 will be compared to January 1, 2007 through June 30, 2008 and January 1, 2006 through June 30, 2007.



To learn more about:

Different Reports (Examples)

Search the Help for:

Practice Analysis – Reports Tab

Work with Graphs

Graphs may be printed using either Excel® or AVImark. This option may be set from Hospital Setup, Advanced Options. When graphing through AVImark you can easily change the style of the graph to Line, Bar or Area by choosing the “Style” in the bottom right hand corner of the graph. You may use only one ‘Organize By’ option at a time when running graphs. After selecting the graph, and the “Organize By” option the user can choose to restrict the graph to specific Doctor, Species, Age, Zip Code, and /or Company.

- On the Practice Analysis window, select the **Graphs** tab.
- Choose the appropriate graph.

- Using the **Period** drop-down list or the **Start** and **End** drop-down calendars, select the correct period to graph.
- In the **Organize By** area, select how you wish to organize the graph.
- If appropriate, select the restriction options you wish.
- Click **Run** to display the graph onscreen.
- Use the **Graph** drop-down list to specify how you wish to display the graph.
- Use the **Style** drop-down list and select either **Line**, **Bar** or **Area**.
- Use the **Print to** drop-down list and select the correct **Printer**. Click **Print**.

Clients

This graph will generate a list of new clients added during the period selected and may be restricted by Zip Code and/or Company. Clients listed on this report are not required to have accounting. This report is looking strictly at the client's added date.

Patients

This graph will generate a list of new patients added during the period selected and may be restricted by Species, Zip Code, and/or Company. This graph will also allow you to report total number of patients.

Income

This graph will generate totals of income collected during the selected period and may be run by Zip Code, Doctor, Species, or Company. All four graphs may be restricted by Doctor, Species, Zip Code, and/or Company.

Visits

This graph will generate the total number of visits during the period selected and may be run by Zip Code, Doctor, Species, or Age. All four graphs have no further restrictions.

Total Charges

This graph will generate total charges during the period selected and may be run by Zip Code, Doctor, Species, or Company. All four graphs may be restricted by Doctor and/or Species.

Total Payments

This graph will generate total payments during the period selected and may be run by Zip Code, Doctor, Species, or Company. All four graphs may be restricted by Doctor and/or Species.



To learn more about:

Different Graphs (Examples)

Search the Help for:

Practice Analysis

Print, Save, Export, and/or Email Reports

After selecting the appropriate report, AVImark gives you the ability to Print, Save, Export, and/or Email the report.

Print the report

- Choose the correct report along with the appropriate period and/or restrictions.
- Use the **Print To** drop-down list and select the correct **Printer**.
- Click **Run**. To display the report onscreen, click **Preview** and click **Run**.

Save the report

- **Preview Print** the report to display the Report Preview window.

- On the **File** menu, click **Save As** to save to the desired location.

Export to Excel®

- Use the **Print To** drop-down list and select **Excel®**.
- Click **Run** to display the report in Excel format.

Email the report

- **Preview Print** the report to display the Report Preview window.
- On the **File** menu, click **Email** to display the Send e-mail window.
- Enter the **Email address**, desired **Subject** and **Text** and click **Send**

CHAPTER 36: DENTAL CHART

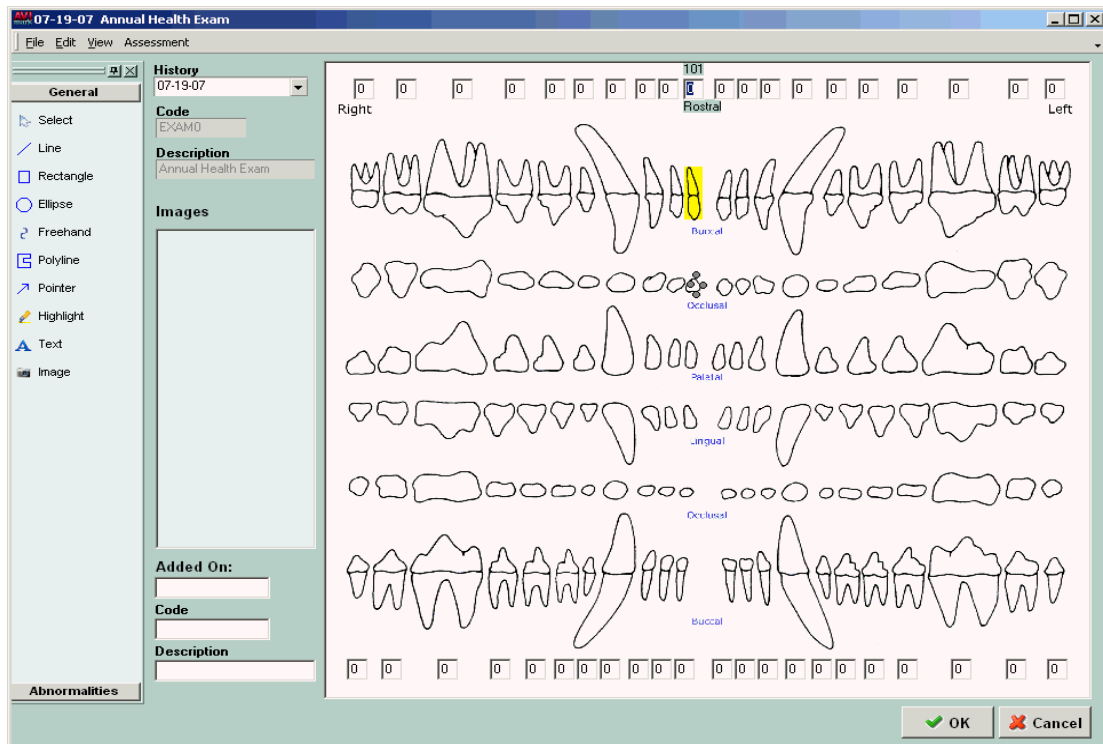
The AVImark Dental Chart feature provides you with the ability to have easy access to a patient's dental records. It also allows for viewing past dental records, recording probing depths and gingival recession as well as the ability to print the records. When a Dental Chart is created for a patient the appropriate canine or feline chart will be displayed. Currently, only canine and feline charts are available.

In this chapter you will learn about...

- » Working with the Dental Chart on page 411
- » Record Probing Depths on page 413
- » Record Gingival Recession on page 413
- » View Previous Dental Charts on page 414
- » Work with Annotations on page 414
- » Create Dental Abnormalities on page 415
- » Print the Dental Chart on page 416
- » AFP® Imaging on page 416

Working with the Dental Chart

A Dental Chart can be associated to any entry in a patient's Medical History.



Creating a Dental Chart

- Highlight the desired entry in Medical History and select the **Dental Chart** attachment option.
- Press the **Tab** key to scroll from tooth to tooth and record probing depths, gingival recession and add annotations.
- Click **OK** to save the chart.

Viewing the Dental Chart

Viewing a chart, you will see the four quadrants as well as the four dental views: Buccal, Occlusal, Palatal, and Lingual. Above the upper quadrants and below the lower quadrants are boxes for recording the probing

depth of each tooth. Pressing the Tab key will begin scrolling from tooth to tooth. When a tooth is selected, its Triadan number will be displayed and the probing depth value will be highlighted for entry.

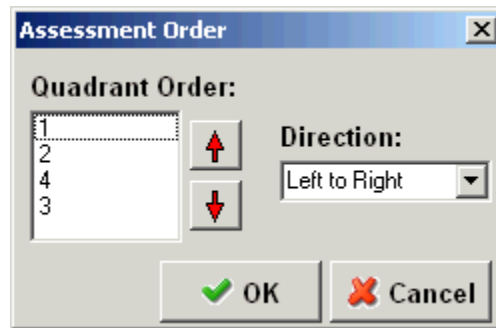
The View menu option contains several functions for displaying the chart and the linked drawings and abnormalities.

- From the **View** menu option in the Dental Chart select **Zoom In** to zoom in on the chart.
- Located under the View menu use the **Zoom Out** option to zoom out on the chart.
- Selecting **Normal Zoom** from the View menu returns the chart to its normal viewing display if the chart has been zoomed in or out.
- The option **Current History Only**, under the View menu, allows only those drawings or abnormalities that are linked to the current history entry to be displayed.

Setting Entry Order

Tabbing from tooth to tooth will move from right to left and quadrant to quadrant. The tabbing order of quadrants is defaulted to Upper Right, Upper Left, Bottom Right and Bottom Left. The tabbing order can be customized.

- From the menu option select **Assessment, Entry Order**.
- Select a quadrant number and use the up and down arrows to move the quadrant to the desired order.
- Use the **Direction List** to modify the right-to-left tabbing order.



Tooth Selection

A specific tooth can also be selected by using its Triadan number. When selecting a tooth its Triadan number will be displayed.

- From the menu option select **Assessment, Tooth Selection**.
- Enter the appropriate Triadan number and select **Ok**.
- AVImark will select the specified tooth.

Saving the Dental Chart

Once all drawings and abnormalities have been added to a chart, all of these changes can be saved.

- Click **OK** on the chart to save changes.
- Or from the File menu select **File, Save**.

Deleting a Dental Chart

Removing a Dental Chart from a medical history entry will only remove the drawings or abnormalities that

were saved to the history entry selected. Additions made to charts that have been saved to other Medical History entries will remain in tact.

- From the File menu select **Delete** in order to delete the selected Dental Chart.



To learn more about:
Dental Chart Use

Search the Help for:

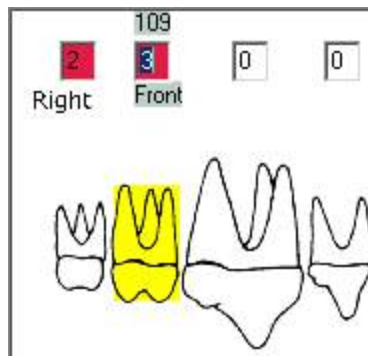
Dental Chart; Viewing Dental Chart

Record Probing Depths

A probing depth value can be recorded for one side of the tooth or for all four sides. For the upper quadrants the value will be displayed in the box directly above the tooth and for the lower quadrants directly below the tooth.

When a tooth is selected, the Occlusal view of the tooth will display a selection point on each side of the tooth. These points allow a side of the tooth to be selected in order to record the probing depth for that side.

- Highlight the desired tooth and select the desired side by clicking on the point.
- In the value box enter the recorded probing depth value.
- You can also **right-click** and from the shortcut menu select **Tooth Side** to choose the side for which you wish to record a value.
- Once a value has been entered the box will be displayed in red indicating a value has been recorded.
- Click **OK** to save the values entered.



Record Gingival Recession

The gingival recession can be recorded for one side of the tooth or for all four sides. The value will be displayed in a box above or below the tooth.

Before recording the gingival recession you must be in the appropriate view.

- From the Dental Chart menu select **Assessment, Gingival Recession**.
- The probing depth values will be replaced by recession value boxes.
- Highlight the desired tooth and select the desired side by clicking on the appropriate point.
- In the value box enter the recorded gingival recession value.
- Once a value has been entered the box will be displayed in red indicating a value has been recorded.
- You can also **right-click** and from the shortcut menu select **Tooth Side** to choose the side for which you wish to record a value.
- Click **OK** to save the values entered.

View Previous Dental Charts

With each new dental chart created, all procedures, images and notations that have been added to previous charts for the selected patient will be displayed on the new chart. The entire dental history of a patient will be defaulted to each new chart that is created so all past procedures, images and notations can be modified or added with each new chart.

- To view the current dental history for the selected entry, choose **View, Current History Only** from the Dental Chart menu.

From the Dental Chart you can view dental records from previous charts.

- Click on the **History** drop-down list and select a date.
- The dental record with the annotations made on that record will be displayed.
- Under the History date the **Code** and **Description** of the entry the chart is linked to will also be displayed.

Work with Annotations

To the left of the Dental Chart is the Toolbar which contains a list of tools and functions that can be used for desired record keeping. This toolbar contains two groups of procedures and functions, General and Abnormalities. When these functions are drawn on a chart they will be saved to the selected Medical History entry, displayed on the current chart and included on future charts.

Once several drawings or annotations have been made on different charts it may be hard to determine when the annotation was made. To identify when the annotation was made select the annotation and in the **Added On** area of the chart AVImark will display the date it was made and the code and description of the medical history entry that entry is associated with.

Working with the Toolbar

This toolbar can be anchored, left floating or closed completely.

- Select the **pushpin** icon to cause the toolbar to always be displayed or anchor the toolbar.
- Leaving the toolbar floating will allow it to disappear when not selected and reappear when the **Toolbox** button is selected.
- Selecting the **X** on the toolbar will cause it to close completely. To redisplay the toolbar select **View, Toolbox** from the Dental Chart menu.

Drawing an Annotation

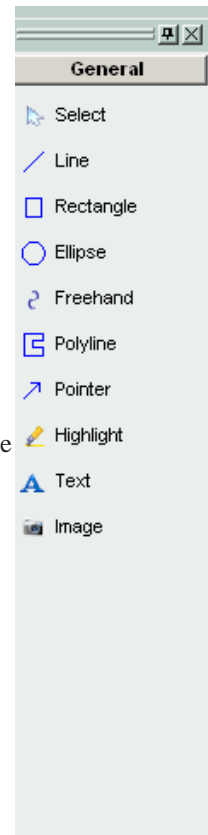
- From the **General** toolbar select an annotation (i.e. ellipse).
- Over the desired tooth hold down the left mouse key and drag the annotation to the desired size to create the drawing.
- Once the annotation has been made you can then move or resize the drawing.
- Continue to create as many notations as desired.

Deleting an Annotation

- Click on the appropriate annotation. The sides of the annotation should be highlighted.
- **Right-click** and from the shortcut menu select **Delete Annotation**.

Text Annotation

- From the General toolbar select the **Text** annotation.
- On the appropriate tooth hold down the left mouse key and drag the annotation to create a text box.



- Click in the text box and type the appropriate notes.
- **Right-click** and from the shortcut menu select **Font** to change the size, color and style.

Image Annotation

Selecting this function will access a browse window allowing a photo of any type that is saved anywhere on your network to be accessed and stored on the Dental Chart.

- From the General toolbar select the **Image** annotation.
- In the Open window locate the desired photo and click **Open**.
- The photo will be displayed in the **Images** section.
- Left click on the image and in the Dental Chart hold down the left mouse key over the desired tooth and drag the box to the desired size.
- The image will then be displayed on the chart where you then have the ability to move or resize the image.

Create Dental Abnormalities

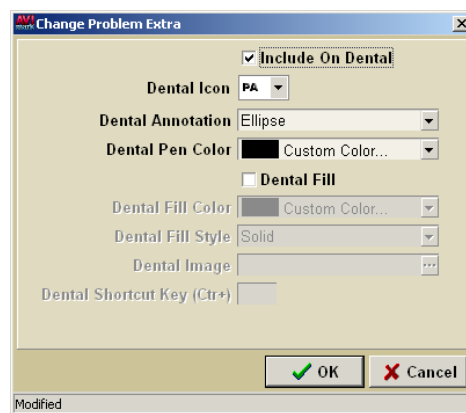
The Abnormalities toolbar contains a list of common dental procedures and problems such as; bridge, missing tooth, extraction, root canal, etc. All of these abnormalities are part of a default list but this list can be completely customized to suit what your clinic needs.

Drawing an Abnormality

- Click on the **Abnormalities** toolbar and select an annotation (i.e. Bridge).
- Over the desired tooth hold down the left mouse key and drag the annotation to the desired size to create the drawing.
- Once the annotation has been made you can then move or resize the drawing.
- Continue to create as many notations as desired.

Creating Dental Abnormalities

All abnormalities are maintained in the Problem List in the Dental Abnormalities category. Abnormalities can be modified or added from this list. Once a new user defined abnormality is created it will automatically appear on the Dental Chart Abnormalities toolbar.



- From the CID menu select **Work with, Problem List**.
- Select the **Dental Abnormalities** category to modify the pre-defined abnormalities or to create new ones.
- From the shortcut menu select **right-click New** to create a new abnormality.

Dental Chart

- Enter a Code, Description and any other necessary information and click **OK**.
- To set the values for this abnormality select **right-click Dental Properties** from the shortcut menu.
- In the Change Problem Extra window check the option **Include on Dental** to cause the abnormality appear on the Dental Chart toolbar.
- Select the **Dental Icon** drop-down list to choose an icon for this abnormality. Selecting the **Custom** option will allow any image file to be selected as an icon for this abnormality.
- The **Dental Annotation** option will determine the type of drawing or annotation that will represent the abnormality. The **Image annotation** will display a new field, Dental Image, which allows a photo to be selected. This will cause the image associated with this annotation to appear when this annotation is used for the Dental Chart. This image must be stored within the Dental folder.
- Use the **Dental Pen Color** to select the desired color for the drawing. This only applies to the ellipse, line, polyline and rectangle.
- Selecting **the Dental Fill** checkbox allows you to select a fill color for the ellipse or rectangle.
- To choose a fill pattern for the ellipse or rectangle select the **Dental Fill Style**.
- Use the **Dental Shortcut Key** option to create a user defined shortcut key for this abnormality.

Once several drawings or annotations have been made on different charts it may be hard to determine when the annotation was made. To identify when the annotation was made select the annotation and in the **Added On** area of the chart AVImark will display the date it was made and the code and description of the medical history entry that entry is associated with.



To learn more about:

Dental Annotation & Abnormalities

Search the Help for:

Customizing Dental Chart

Print the Dental Chart

There are two printing methods in the Dental Chart.

Dental Chart Report

The Dental Chart report will print the chart just as it is displayed, with all drawings and abnormalities, but the probing or gingival recession values will not be included.

- In the Dental Chart select the **File, Print** menu option.
- Choose the desired printer and select **Print**.
- To view the report before printing select **Preview**.

Progress Report

The Progress Report will print two reports, one will be from the currently selected Dental Chart and the other will be the chart that is immediately prior to the selected chart. The report of the currently displayed Dental Chart will print as the After and the report of the chart immediately prior will print as the Before.

- From the Dental Chart **Assessment** menu select **Progress Report**
- Choose the desired printer and select **Print**.
- To view the report before printing select **Preview**.



To learn more about:

Printing the Dental Chart

Search the Help for:

Printing Dental Chart

AFP® Imaging

AVImark integrates with AFP® Imaging, a digital radiographic system that is very common in veterinary

dentistry. Hospitals using ImageWorksequipment can launch the ProImage® software directly through AVImark Dental Chart to view images within the ProImage® software.

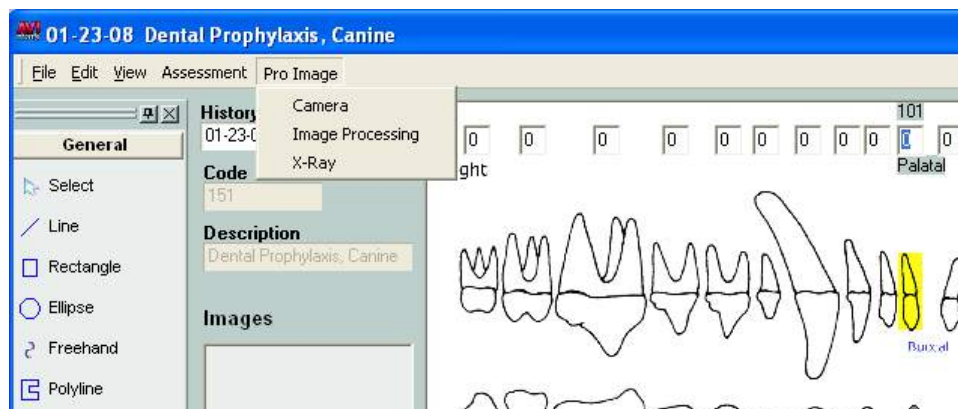
Setting up AVImark with ProImage.exe

In order to utilize this integration, you will need to indicate where the ProImage® software is installed on your computer.

- Go to the **Options Maintenance** window.
- Locate the advanced option in the **Lab Instruments** category called **AFP**.
- Inside this category select the option called **Application Path**.
- Enter the path to where the ProImage® executable file is stored.

Using the ProImage® software

- Once the path is set correctly there will be a new Menu group named **Pro Image®** in the Dental Chart.
- Clicking this will reveal three menu items: Camera, Image Processing, and X-Ray.
- Selecting any of these three will launch the ProImage® software in that specified area. If this menu does not exist the ProImage.exe cannot be found at the path specified in advanced options.



- ProImage® will open to the patient you are creating the dental chart for in AVImark if that patient also exists within ProImage®. If the patient does not exist in the ProImage® database it will add them.
- If a patient that exists in ProImage® is deleted from AVImark the patient can also be removed from ProImage® by manually finding them then deleting. To delete the patient you will have to manually find them in ProImage® and then select the Delete Patient option.

CHAPTER 37: DIGITAL RADIOGRAPHY

Digital radiography is a form of x-ray imaging, where digital x-ray sensors are used instead of traditional photographic film. Advantages include time efficiency through bypassing chemical processing and the ability to digitally transfer and enhance images. Also less radiation can be used to produce an image of similar contrast to conventional radiography.

AVImark currently integrates seamlessly with several outside PACS systems.

In this chapter you will learn about...

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- » DragonflyPACS® on page 419
- » IDEXX® InterLink Technology for DICOM Imaging on page 427
- » Radiographs Medical History View Tab on page 432
- » Sound-Eklin™ DICOM Integration on page 434

DragonflyPACS®

DragonflyPACS is integrated with AVImark veterinary software, allowing veterinarians to request, receive, view, and store images within AVImark's Client Information Display (CID), while automatically capturing charges and passing them on to clients.

Dragonfly is a DICOM 3.2 compliant DICOM PACS Server/Worklist/Viewer bundle developed by O&R Technology (<http://www.or-technology.com/>) and distributed exclusively for NA veterinary purposes by McAllister Software Systems, LLC.

Dragonfly (dicomPACS® 5) is in conformance with the Digital Imaging and Communications in Medicine standard (DICOM) and is conformant with the recommended format as described in PS 3.2 of the DICOM standard (Digital Imaging and Communications in Medicine (DICOM), NEMA PS 3.1-15, 2000.).

DragonflyPACS® Hardware Requirements (Minimum)

The Dragonfly database will work on 32 and 64 bit platforms. Server requirements should take into consideration Microsoft SQL requirements.

Workstation Requirements

- Processor: Intel Core Duo/Core 2 Duo or comparable AMD Dual Core Processor with more than 2 GH. The application will benefit from four or multi-core-processors.
- RAM: minimum 1GB RAM for the dicomPACS Viewer.
- For diagnostic and slices: 2GB RAM for the dicomPACS® Viewer.
- Hard Disk: 80 GB hard disk min.
- CD/DVD drive (if burning a CD)
- Network Card: 100 MB
- Graphics card: Resolution of at least 1,280 x 1,024 pixels in the True Color mode; For diagnosing special graphics cards must be used, depending on the resolution of the diagnosis monitor.

AVImark Setup for DragonflyPACS®

Advanced Options

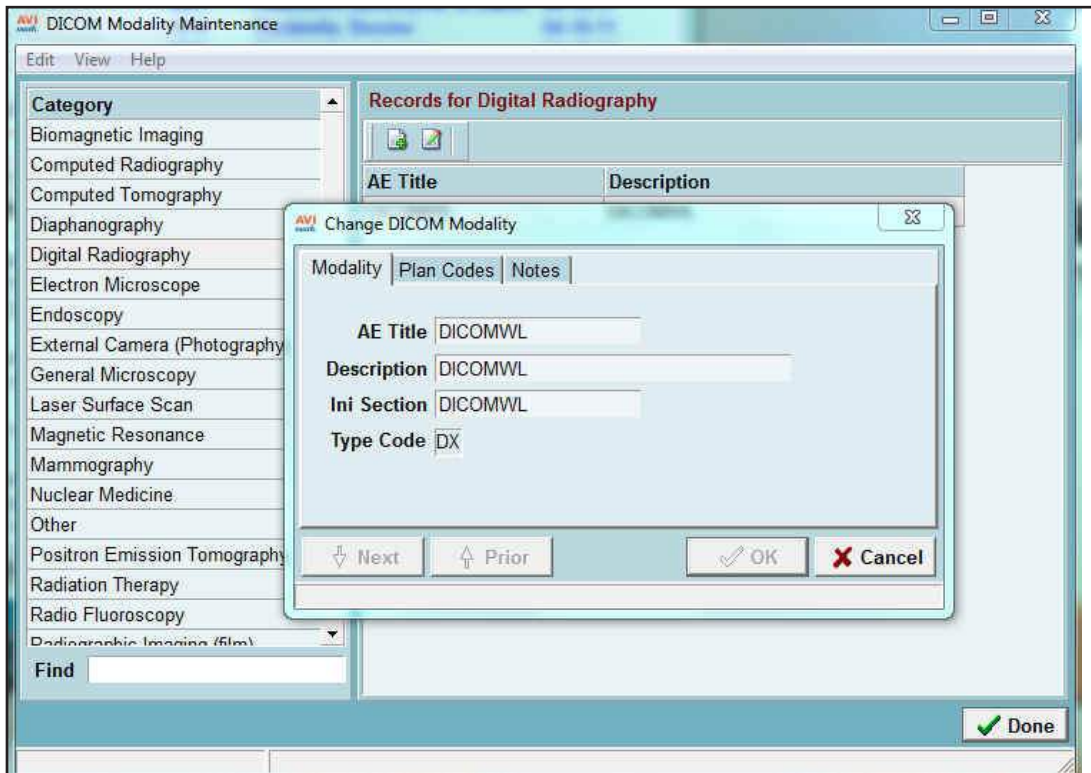
Launch Advanced Options window by selecting the wrench icon of the AVImark CID and begin typing "dragonfly" in the Search field.



- **Active** - Setting to True will activate feature when appropriate licensing is present.
- **Computer GUID to Monitor Dragonfly PACS Request Status** - Will be set automatically by using the “Set Dragonfly Watch Computer” menu found in the Utilities menu. More information below.
- **Dragonfly Local PACS Program Path** - Will default to being assigned with typical setting: c:\dicom PACS.
- **Dragonfly Network PACS Program Path** - Will default to being assigned with typical setting: N:\dicomPACS.
- **Dragonfly PACS Imported Shots Treatment Code** - AVImark treatment code used when importing previously “Archived” images. The AVImark code assigned to this entry cannot contain any pre-defined DICOM entries, and should be set up in your AVImark Treatment List.
- **Dragonfly Miscellaneous Shot Treatment Code** - This code will be used for instances where there were more images captured than originally requested. This code will be added to the Medical History with a quantity reflecting the number of additional images and should be set up in your AVImark Treatment List.
- **Dragonfly PACS Server** - This will be the path to your Dragonfly PACS server. This should typically be an IP address and program path. For example: 123.45.6.78\dicomPACS
- **If writing to a CD, Dragonfly requires that the software program Nero (version 8 or above) installed on the workstation** - Will display a message, if set to “Prompt”. Setting to OK, will not display the warning.
- **Location of BDT2Pacs.exe File** - Typically c:\BDT
- **Minutes Between Status Checks** - Defines the number of minutes between status checks performed by the Dragonfly Watch Computer.
- **SQL Database** - should typically be AVImark
- **Wait Seconds After Starting Up Dragonfly PACS** - If a command requiring Dragonfly is issued, and Dragonfly is not running, it will be launched automatically. It usually takes a few seconds or more for Dragonfly to load. This is the number of seconds to wait before continuing with the request (if we had to start Dragonfly).

Modality Setup

From the AVImark CID, select **Work With, DICOM Modalities** to open the DICOM Modalities area where you can begin setting up your modality lists. In the left pane, you will see a list of current DICOM modality types. Additional modality types can be added manually if desired.



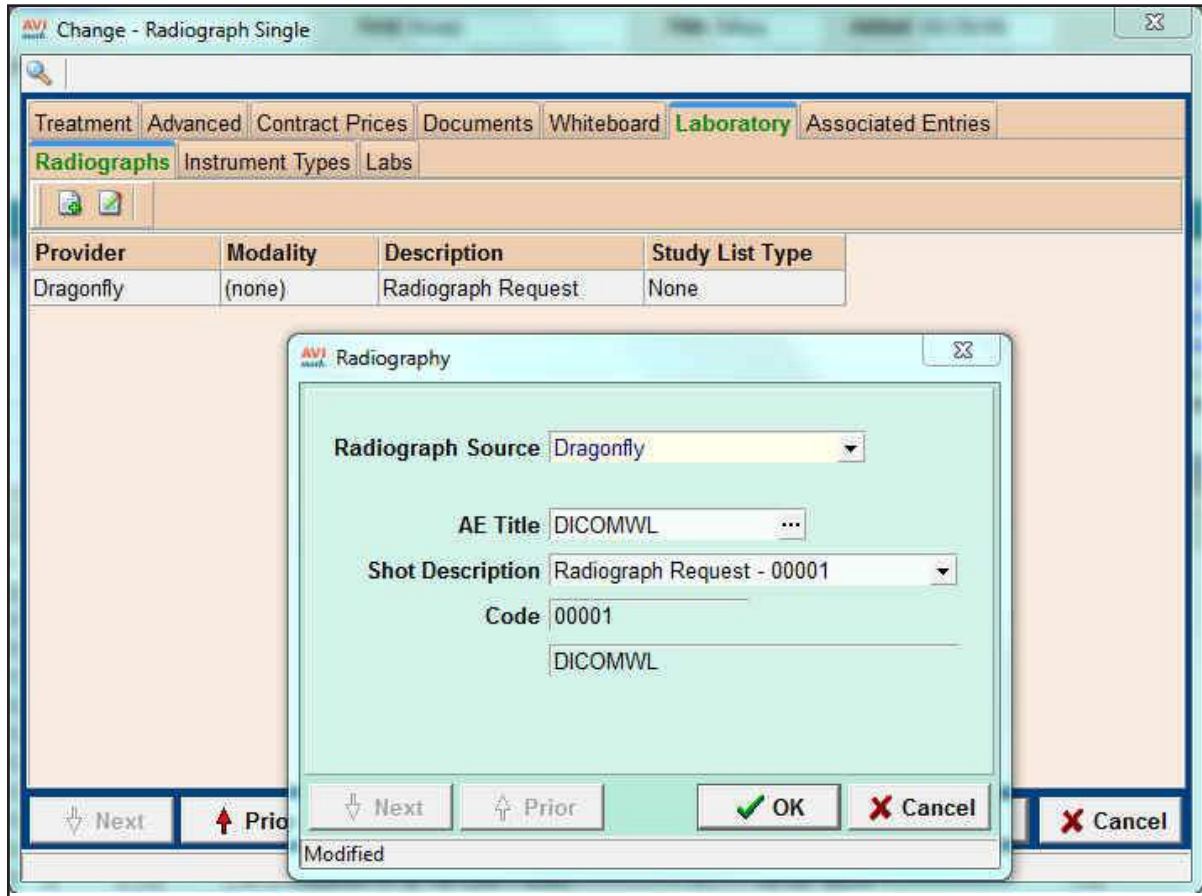
- To add a Modality select the appropriate Modality category from the left pane.
- Navigate to the right pane, and add a new modality by right-clicking and select New or F2 New.
- You will be presented with the Enter DICOM Modality window with three tabs.
 - Modality Tab
 - **AE Title (Application Entity)** – The value found in the Modality AE Title (SCU) field.
 - **Description** – User defined description for reference.
 - **Ini Section** – This is a uniquely named section to store description information within a configuration file for reference only.
 - **Type Code** – Represents the Modality Type.
 - Plan Codes Tab
 - Using F2, right click and select New, or the Add button, begin adding the valid plancodes this modality is configured to support.
 - You should enter the Code and a Shot Description. This should match the information available in the modality.
 - We have incorporated the ability to import a Plan Code list, if one is provided with your modality. To use this import feature, the Plan Code list must be an ASCII Tab delimited file containing two columns (plan code and plan description).
 - Right-click in the Plan tab, select Import Codes from File, select the desired list file to import your plan code list file.
 - Notes Tab
 - A Notes tab has been provided to enter any general purpose information related to this modality.

Saving this entry will create a section for this modality in the BDT2PACS.ini file. To update your DT2PACS.

ini file after any additions or modifications to your Modality List, select Write to the BDT2PACS Configuration File. From the DICOM Modality Maintenance window, select Edit > Rewrite the BDT2PACS Configuration File.

AVImark Treatment Setup

Designated AVImark treatments will need to be set up to generate shot requests. You can create new treatments, or add DICOM request information to existing treatments.



- Open either a New or Change Treatment window.
- Select the Laboratory tab, then Radiograph subtab.
- Open the new Radiography window by right-click New, or F2.
- Select Dragonfly from the Radiograph Source drop down.
- Select the AE Title by using the ellipses.
- Once the AE Title has been set, you will be presented with the list of choices for Shot Descriptions; this is based on the list of Plan Codes you have entered for this Modality.
- When the Shot Description has been selected, the corresponding Plan Code will automatically be entered.

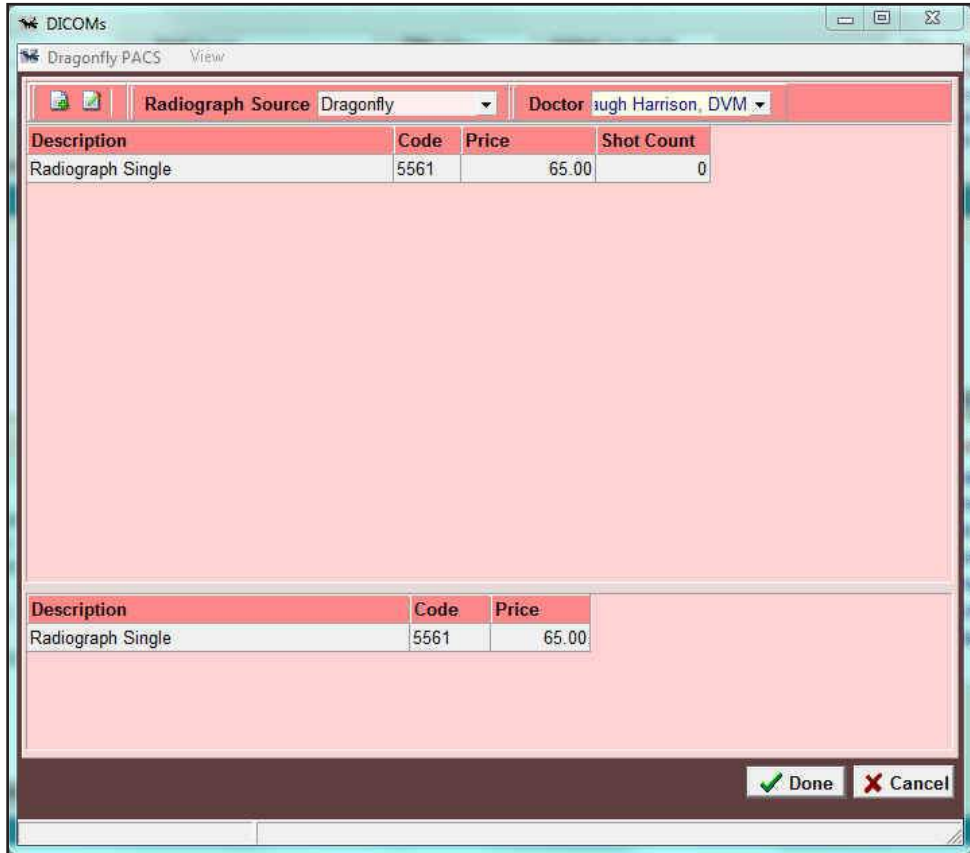
****Note:** If you change your AE Title, the Shot Description and Plan Code will be removed, as they will no longer be valid. A new Shot Description and Plan Code should be selected if the AE Title has changed.

As mentioned in the Advanced Option Setup section of this document, you should also have Miscellaneous Shot Treatment and an Imported Shot Treatment codes created. It is important that neither of these treatments have Dragonfly Shot Requests associated.

Creating Radiograph Requests from AVImark

Generating a request from AVImark can be accomplished in multiple ways. Adding a treatment with associated Dragonfly requests directly to Medical History is the most common method for submitting a shot request.

- Right-clicking in the Patient Area, and selecting Radiography, Create Request will display a selection screen displaying all AVImark treatments with associated DICOM requests.
- To make your selection(s) from this window, highlight the desired entry, and press the Spacebar to place the highlighted entries in the Selected area found in the lower pane of the window.



- Choose the appropriate doctor, then click OK. This will create a Medical History entry for each selection made.
- By creating the Medical History entries, shot requests are automatically created in Dragonfly PACS using the associated plan codes for the designated modalities.
- Highlighting an AVImark Medical History entry with associated shot requests will display the Radiograph checkbox in the Attachments pane in red with a check. This bright red color indicates there is a pending shot request.
- When the shot request is completed by the modality and updated in the Dragonfly PACS system, the Radiograph attachment will become maroon in color, indicating images are available for viewing.

Completed Shot Requests

AVImark will query Dragonfly for any requests that have been completed, but not yet updated in AVImark. When found, the appropriate association is made and the entry will be automatically updated indicating the status is complete and add information to the files to allow viewing and all other DICOM related functions.

If more images were taken for a request than were initially ordered, the user is notified, and an entry for the miscellaneous shots (Using the Miscellaneous Shot Treatment Code as defined in Advanced Options) is added

to the patient's Medical History. The quantity of this entry reflects the difference between the number of shots initially ordered and the actual number of images captured with this request.

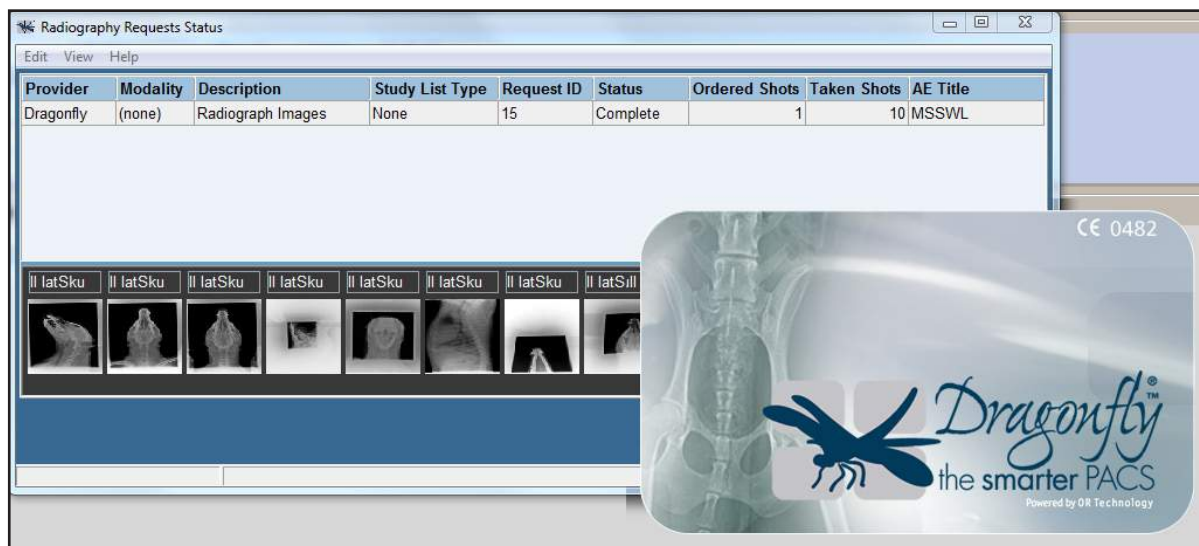
The "Check for Completed Results" can be automated. This automation will allow a designated AVImark workstation to poll on a regular basis for completed requests and automatically update Medical History with the captured shot information.

- To initiate the automation, you will want to select an AVImark workstation that will have AVImark running during all business hours.
- From the AVImark CID on the chosen workstation, select Utilities > Set Dragonfly Watch Computer. You will be asked to confirm your designation. It is important to remember that only one AVImark workstation can be set as the "watch" computer at a time.
- If you currently have a computer set as the "watch" computer, and you set another to be the "watch", the newly selected workstation will override the previously assigned computer.

Viewing Images and Checking Request Status

You can view the status of any shot request, view shots taken, as well as manage shot status from within the same area.

- To access images, click the Radiographs attachment.
- You will be presented with the details of the Radiography Requests for this Medical History entry, such as Status, number of Ordered Shots, and number of Taken Shots.



- Right click on a completed request to see the following options:
 - **View Images**
 - **Send To Web** - Allows you to post images on a Dragonfly PACS Web Server. Within the scope of the images selected from the menu option, you will be able to manually exclude any images you wish. You will be asked for email addresses to send to the individuals you wish to be able to view these images from the web. The image retention on the web is determined by your Dragonfly PACS Web Server.
 - **Choose from All**
 - **Burn to CD or Folder** – Allows you to designate a CD RW or a thumb drive to burn the images onto. A lightweight Dragonfly DICOM viewer will be included. To burn a CD your computer must have a CD burner and NERO software installed.
 - **Digital Imaging Send** – will allow users to send images from PACS while still in AVImark,

provided PACS is setup to perform the Telemedicine function.

- **E-Mail** – allows you to convert a set of DICOM images to JPEG, BMP or PNG and attach to an email to send. Boilerplate is inserted into the email body, but can be customized by the user before sending.
- **Request Status**
 - Check for Completed Requests will poll the Dragonfly software for completed shot requests.
 - Set Status for Requests to Complete will mark the status of this request as completed. This will need to be done to manually close the request if it has been completed without taking the recommended number of shots.

Emergency Shot Reconciliation

In the event there are emergency capture studies (or studies not yet associated to an AVImark patient's Medical History), you will be provided a way to reconcile those shots with AVImark.

- From the Patient Area of the AVImark CID, right-click, select Radiography, Create Request.
- In the DICOM window, select the appropriate doctor.
- Click on the Dragonfly PACS menu, Reconcile from Emergency List to Current Patient
- You will be presented with a screen containing a list of all currently non-reconciled shots. Upon making your shot selection, a new Medical History entry will be created with the Miscellaneous Shot Treatment Code (as assigned in Advanced Options), and the appropriately linked images.

Importing Images

The ability to import jpg images from a disk has also been provided. This feature will allow you to archive your images through Dragonfly, and then import the images into AVImark via an automatically created Medical History entry.

- Right-click in the AVImark Patient Area, select Radiography, Dragonfly JPG/BMP Image Import.
- Dragonfly will open, and the selected patient information should appear in the upper left corner.
- In the lower right pane, you will need to select the Images, In/Out button.
- From the menu that opens, select the Import Images button.
- Browse and select the images you wish to import for this study.
- Once images are selected, press the Import Images button.
- The images can now be archived by selecting the <<Management button found in the lower right pane.
- Select Archive from the opened menu.
- Select the option that best represents the images you would like to archive.
- Verify the proper patient selection. It is possible you may have to select the appropriate client/patient from the list provided in the Patient Data section.
- Make any desired notations or comments to the study from within the Study Data section.
- When image selection and study notations have been made, and patient verified, the Archive button should become available for selection. Press Archive.
- You should notice the client/patient information is no longer displayed in the upper left corner of the Dragonfly window.
- There will be a new entry in the Medical History for that patient with the Dragonfly Imported Shot Treatment Code as designated in Advanced Options.

- Upon the next automatic status update, whether manual or scheduled, the imported image thumbnails for the study will be displayed in the Radiographs window.

Patient Charts

DICOM shot information can be reported on the Patient Chart by selecting the new AVImark Patient Chart option DICOM Info, found in the “Include the Following” list of check boxes.



Reporting

Right-click in the Patient Area, select Radiography, Print Requests Status List, to generate a Radiograph Request report. The Radiograph Requests window will open. You will be able to select the provider, status, start, and end dates you wish to be reported.

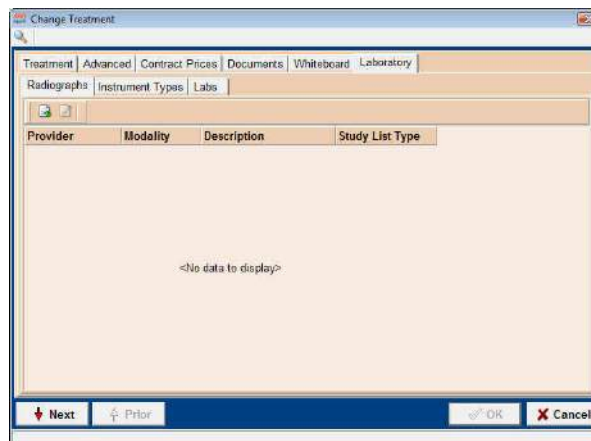
IDEXX® InterLink Technology for DICOM Imaging

AVImark has once again teamed up with IDEXX® to bring our users bi-directional communication. With this feature, you will have the ability to send radiography requests and view study images without leaving AVImark!

Advanced Options

- **IDEXX Digital Imaging Active** - Set to True
- **IDEXX Digital Imaging Miscellaneous Shot Treatment Code** – The AVImark treatment you wish to represent additional shot charges. More information below in the section labeled **Additional Features > Capturing Additional Shots**.
- **IDEXX Digital Imaging PACS Timeout** –Allows users to increase the PACS Timeout to assign a designated wait time to bypass the default time period.
- **IDEXX®Digital Imaging PACS User Password** – enter user specific password information used for logging into IDEXX® PACS

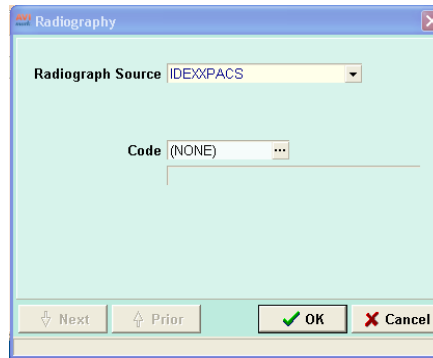
****Important Note:** When you set up or modify the IDEXX®-PACS passwords of users in Advanced Options, they will automatically be created or modified in the PACS system as well. Conversely, if you change a password through the PACS system, they will NOT be updated in AVImark. It will then become necessary to also log into AVImark and set this information to match. We always recommend all password maintenance be preformed from with AVImark.



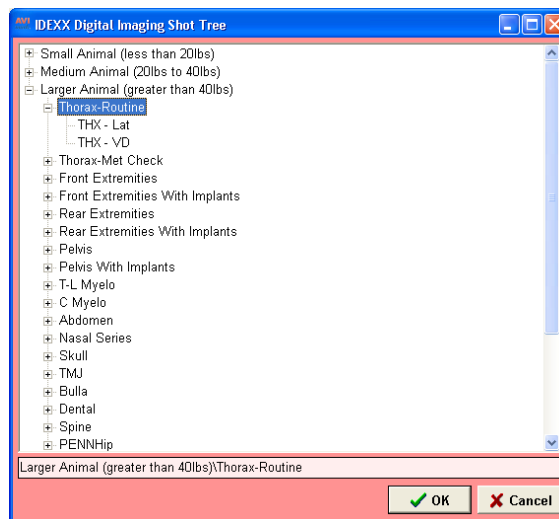
Treatment Configuration

You may add Radiography shot requests to any existing treatment or create new treatments for shot requests.

- In the Change Treatment window, select the Laboratory tab.
- Within the Laboratory section, select the Radiographs Tab.
- Right-click, **New** to add the shot request, and select IDEXX PACS as the Radiograph Source.



- Click the button for the Code field. You will be presented with the IDEXX® Digital Imaging Shot Tree window to make your shot selection.
- Selecting a group of shots is possible by selecting from a higher level on the shot tree, as shown in the example below:

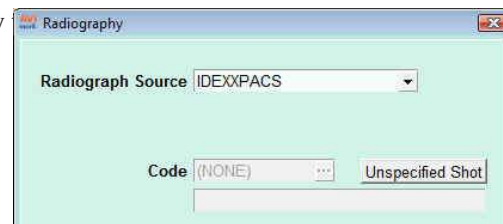


- Selecting Thorax-Routine will add one line to the Radiograph tab of the Treatment, but will request 2 radiographs when the treatment is assigned to a patient (THX – Lat, and THX – VD).
- When you press OK, the entry form will be filled in.
- Click OK to finalize the shot addition to this treatment. You can continue adding shot requests, if desired.

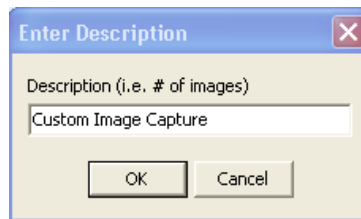
****NOTE:** If a single radiograph shot request is desired, simply drill down to the desired individual shot in the Shot Tree to make your selection.

Although we recommend proper advance setup of IDEXX® Radiograph Code association to your AVImark treatments, and creating shot requests using the pre-defined AVImark Treatments for this feature; we understand there will inevitably be times when it will become necessary to send a generic or unspecified shot request. Pre-defining an AVImark treatment with an Unspecified Shot will allow a user to select the shot(s) from the IDEXX®-PACS Imaging Dashboard.

- In the Change Treatment window, select the Laboratory
- Right-click, **New** to add the shot request, and select IDEXX®PACS as the Radiograph Source.



- Click the **Unspecified Shot** button.
- In the Enter Description window you can create the description that best defines your desired use for this treatment.



- When this treatment is selected and added to Medical History, you will be presented with the DICOM Request Instructions window. Enter the number and type of shots to be taken. This information will appear in the IDEXX®-PACS Imaging Dashboard request as well as the DICOM Radiography Request Record.

Provider	Modality	Description	Study List Type	Request ID	Status	Ordered Shots	Taken Shots
IDEXXPACS	9999	1 Lateral Thorax	None	13	Requested	0	0

****Important NOTE:** While it is possible to have more than one DICOM Shot Request on an AVImark treatment, it is NOT possible to have more than one DICOM Shot Request on an AVImark treatment that has an Unspecified Shot Request (code 9999) assigned.

Client and Patient Records

- When new Clients and Patients are added to AVImark, they will be added to the PACS database as well.

****Please Note:** New clients alone will not be added to the IDEXX® InterLink system. Only new clients that have patients will be automatically added.

- Saving changes to client or patient records in AVImark will automatically update records in the IDEXX® InterLink database.

****Please Note:** Deleting client/patient records automatically is not supported by the IDEXX® InterLink interface at this time.

Creating Radiograph Requests

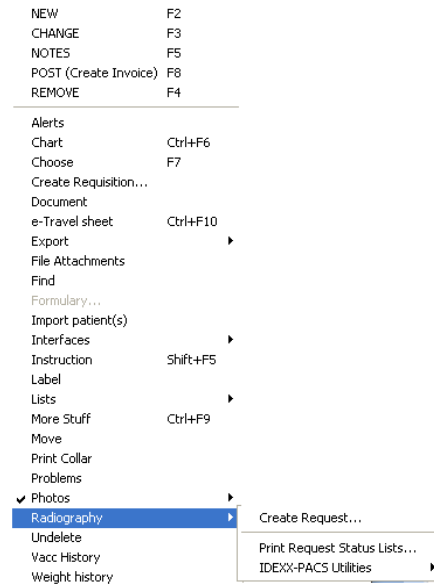
Creating your InterLink Radiograph Requests from within AVImark can be accomplished in a variety of ways. You can simply add an AVImark treatment containing a radiograph shot assignment into Medical History using any of the many available Medical History addition methods, such as F2, right-click New, right-click Choose, etc. The preferred method is to right-click in the AVImark Patient Area, and select Radiography, Create Request.

- A DICOM window will be displayed with your IDEXX® InterLink associated AVImark treatments.
- Make your treatment selection by highlighting the appropriate treatment; hit the Spacebar or right-click, Select.
- Select your doctor, and press Done.

Your AVImark treatment will be entered into Medical History, and the shot request will be sent to the InterLink software.

Once a shot request has been generated from within AVImark, you will notice the Radiographs option in the Medical History Attachments section will become red, and be marked with a check. This indicates that a shot request has been sent, and is awaiting images.

- When the shots are completed and available for view, you will see the Radiographs Attachment is now brown in color.



Viewing Images and Checking Request Status

You can view the status of any shot request, view shots taken, as well as manage shot status from within the same area.

- To access images, click the Radiographs attachment. You will be presented with the details of the Radiography Requests for this Medical History entry, such as Status, number of Ordered Shots, and number of Taken Shots.
- Right click on a completed request to see the following options:
 - View Images – allows you to either view the selected series or whole study.
 - Burn to CD or Folder - will allow you to burn images to a CD or Folder
 - Digital Imaging Send – will allow users to send images from PACS while still in AVImark, provided PACS is setup to perform the Telemedicine function.
 - E-Mail – allows users to email images from PACS while still in AVImark, provided the E-Mail feature is set up in PACS.
 - Request Status:
 - Check for Completed Requests will poll the InterLink software for completed shot requests.
 - Set Status for Requests to Complete will mark the status of this request as completed. This will need to be done to manually close the request if it has been completed without taking the recommended number of shots.



Additional Features

Reconciling Studies

Occasionally you may need to reconcile a study that was performed in the InterLink software, but not generated by an AVImark request.

This can be accomplished by:

- Right-click in the AVImark Patient area and select Radiography, Create Request.
- You will be presented with the DICOM list containing the radiography request associated AVImark treatments. From this list, right-click on the entry that represents the study, select IDEXX® Digital Imaging, and the appropriate reconciliation option.
- Once you have made your Reconciliation selection, the AVImark treatment is added to Medical History with the study assigned, in both AVImark as well as IDEXX® InterLink, and the status will be marked as Reconciled.

****NOTE:** When using the reconciliation option and selecting an AVImark treatment with multiple shot requests associated, the IDEXX® InterLink shot count will all be assigned to the first entry in the list. When a study is initiated outside AVImark, the shot mapping information is not sufficient to fully align shots to the AVImark “canned” shot requests. This results in all captured shots pulled to this selected treatment, but simply not broken down into separated shot requests for that selected treatment.

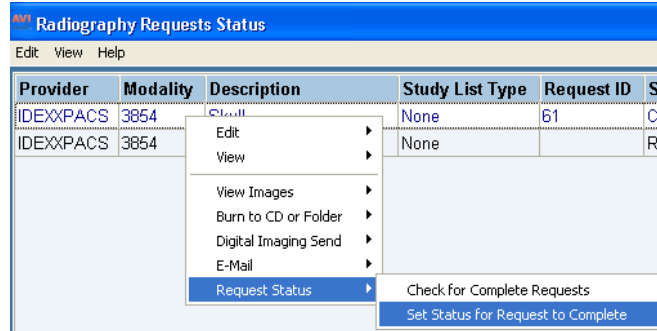
- **Capturing Additional Shots** – When shots are taken in addition to the shots requested from an AVImark request, AVImark provides the ability to automatically make additional entries in Medical History. The purpose of this added feature is to allow any additional shots taken to be easily tracked, as well as reducing missed charges.
 - To benefit from this ability, you will need to make sure the **IDEXX® Digital Imaging Miscellaneous Shot treatment Code** is established in AVImark Advanced Options.
 - Create or locate the AVImark treatment you wish to represent additional shot charges.
 - Open Advanced Options, type IDEXX® in the Search field, select **IDEXX® Digital Imaging Miscellaneous Shot treatment Code**, press the Change button, and add your AVImark treatment code in the field provided.
- During the shot capture, if it is determined that shots are needed in addition to images requested from within AVImark, simply continue with the shot capture as desired.
- When accessing the Radiographs Attachment for that original Medical History entry, you will be alerted with a message that additional shots were taken.
- An additional entry will be placed in Medical History using the code designated in Advanced Options, with the quantity and amount representing the number of additional shots taken. All images will be associated to the original Medical History entry, including the additional images.



Closing a Request

If a request is completed without taking the number of shots recommended, it will become necessary to close the request manually.

- Select the Radiographs Attachment, right-click on the open request, select Request Status, Set Status for Request to Complete.



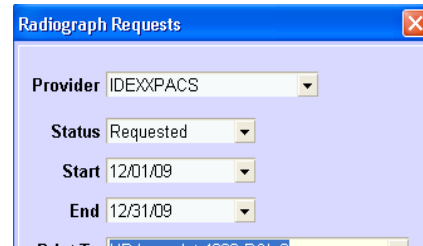
- This process will also “complete” the request in the IDEXX® InterLink software.

****NOTE:** The forced closure must be performed from within AVImark, as there is no way currently to “complete” a request in IDEXX® InterLink software without taking all requested shots. In addition, if you delete a Medical History entry from AVImark containing shot requests for which none of the shots have been taken, the request will be closed and removed from IDEXX® Imaging Dashboard.

Review Status List

You can print or view a list of requests by right-clicking in the Patient Area, selecting Radiography, **Print Request Status List**.

- The Radiograph Requests print dialogue window will open.
- From this window you are able to select the parameters of the report you wish to generate.



Date: 12-31-09		Loving Care Animal Hospital				Page: 1	
Complete Radiograph Requests : IDEXXPACS - From 12/01/09 through 12/31/09							
Client	Patient	Req Date	Description	ID	Ordered	Taken	
Cravens, Marla	Zoey	12-14-09	Skull	54	4	4	
Cravens, Marla	Toby	12-14-09	Skull	55	4	4	
Cravens, Marla	PITA	12-16-09	Skull	56	4	4	
Cravens, Marla	Toby	12-28-09	Skull	59	4	4	
Dalia, Pamela	Buster	12-30-09	Skull	60	4	0	
Dalia, Pamela	Buster	12-30-09	Skull	61	4	0	
Dalia, Pamela	Buster	12-30-09	Dental - Mandible Right OBL	62	1	0	
Dalia, Pamela	Buster	12-30-09	Dental - Mandible Right OBL	63	1	2	
Dalia, Pamela	Buster	12-31-09	Dental - Mandible Right OBL	64	1	4	

Radiographs Medical History View Tab

A Radiographs Medical History View tab is available to allow users to view all Medical History entries that have associated Radiograph shots. Treatments with radiograph assignments in the Change Treatment window will automatically be displayed on the Radiographs History tab when posted to Medical History.

Radiographs

Date	Time	Dr.	Type	Code	Description	Qty	Amount
03-23-10	3:05p	MKC	S	ABDOMEN	Abdominal Study	1	80.00

Attachments

- Dental Chart
- Form
- Inventory Used
- Medical Condition
- More Stuff
- Notes
- Photograph
- Attachments
- Vaccination
- Tests
- Radiographs

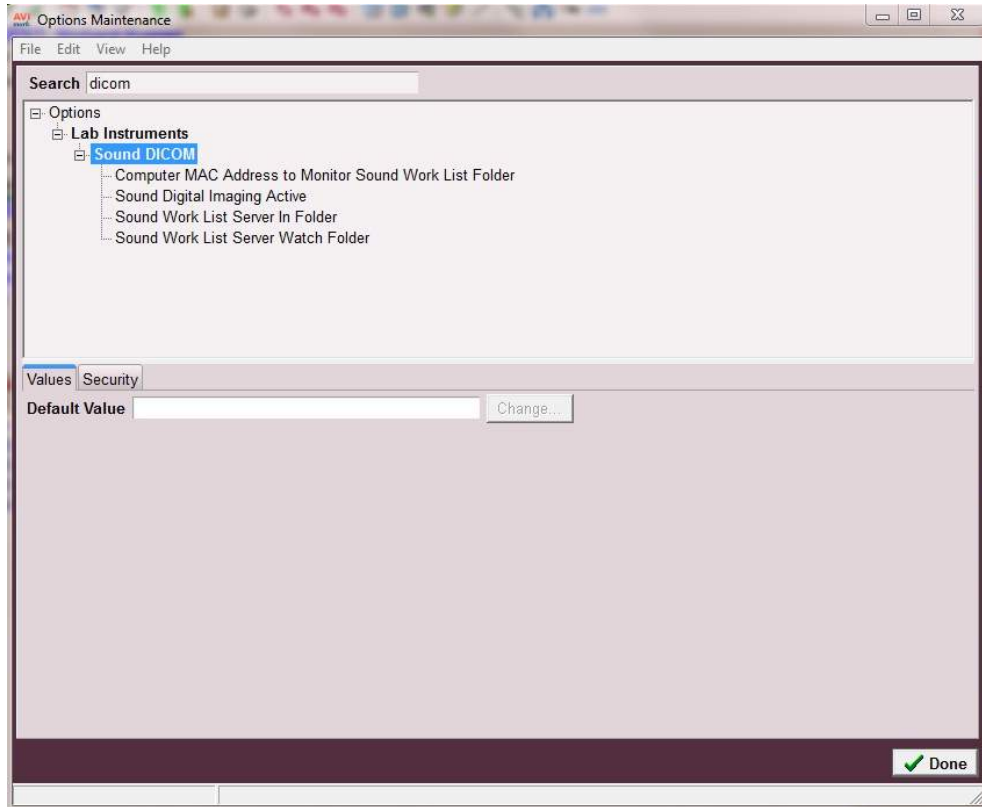
X-Ray SOAP Photos Notes Public Problems Attachments Dental Requisitions Radiographs

Sound-Eklin™ DICOM Integration

AVImark is compatible with Sound-Eklin DICOM Imaging. With this new feature, you will be able to send DICOM Imaging requests, as well as view the images by accessing the Sound-Eklin viewer from an AVImark Medical History Entry.

AVImark Advanced Option Setup

- Click on the Advanced Options speed bar button (wrench icon), type DICOM in the Search field, select Sound DICOM and you will see the appropriate fields for entering your Sound information.

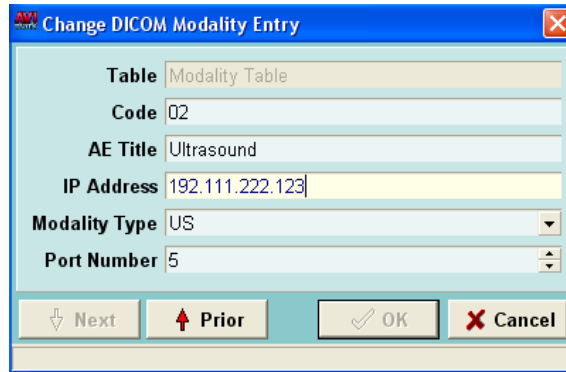


- **Computer MAC Address to Monitor Sound Work List Folder** – Will be set automatically by using the “Set Sound Watch Computer” menu found in the Utilities menu when the Sound Digital Imaging Active is set to True. This information is for reference only and we do not recommend manually entering or altering.
- **Sound Digital Imaging Active** – Activates the Sound feature.
- You will need to create two folders. These directories are user defined, and can be created in any shared fully accessible location on your AVImark network. AVImark will need full directory paths set to the appropriate folders.
- **Sound Work List Server In Folder** - receives exported DICOM requests from AVImark automatically
Sound Work List Server Watch Folder- folder that alerts AVImark that DICOM Study is ready to be accessed.

AVImark Modality Setup

Modalities for Sound are defined in System Tables. There is a new table necessary and if not present, should be manually created:

MODALITY (Table Code) – Modality Table (Table Description) – This table will be used to define all Modality types as well as their location.

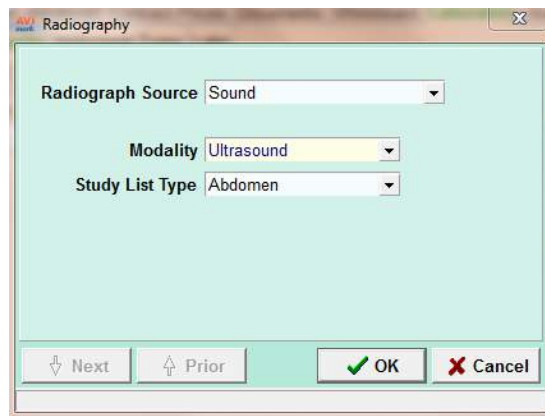


AVImark Treatment Setup

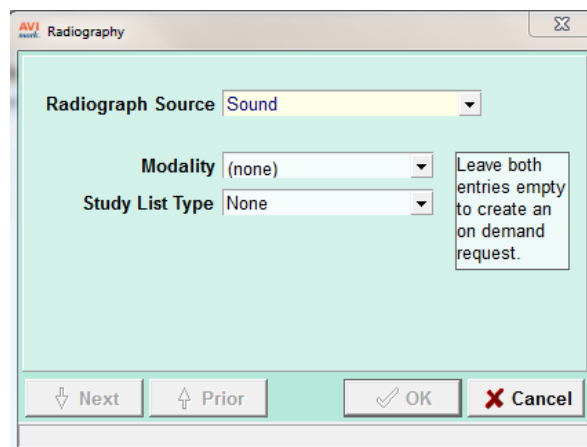
To setup the Treatment List to accommodate this interface, you can use an established AVImark Treatment, or create new ones specifically to use for this feature. Each treatment will need to have the Modality assigned.

Attaching a Modality

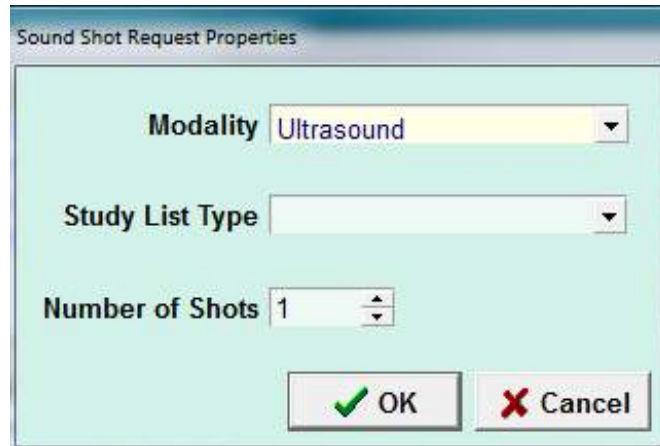
- Ppen the Change Treatment window; select the Laboratory tab, then the Radiograph subtab. Right-click and select New to open the Radiography window. Select Sound for your Radiograph Source, select the appropriate Modality, and Study Type.



We have also incorporated the ability to generate an “On Demand” shot request. This will allow users to leave the Modality and Study List Type fields set to (None).



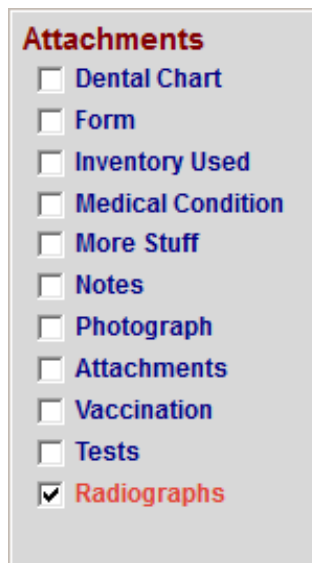
Users will be presented with a drop down list for shot and count selection at the point of Medical History entry.



This completes the setup for the new Sound-Eklin interface; you are now ready to begin assigning treatments to patients.

Medical History Access

When a treatment is posted to Medical History with a Sound shot request, an .xml file is generated and sent to the “Sound Work List Server In Folder” where the DICOM Server will read it and route the study to the correct Modality. This is performed in the background automatically. The DICOM Server will send an .xml file to the “Sound Work List Server Watch Folder” when the study is complete. At this time, AVImark will read from the “Sound Work List Server Watch Folder” and attach the DICOM Image location to the AVImark Medical History record that generated the request. You can identify a Medical History Record that has a completed study by a check in the Radiograph checkbox in the Attachments Window in Medical History.



Once the study is complete, you can view that DICOM Image from the Medical History Entry by either clicking on the Radiograph Attachment option to launch Antech Imaging Services web access viewer.

NOTE: Viewing images will require web access from all workstations intended for viewing.

CHAPTER 38: DOCUMENT MANAGEMENT

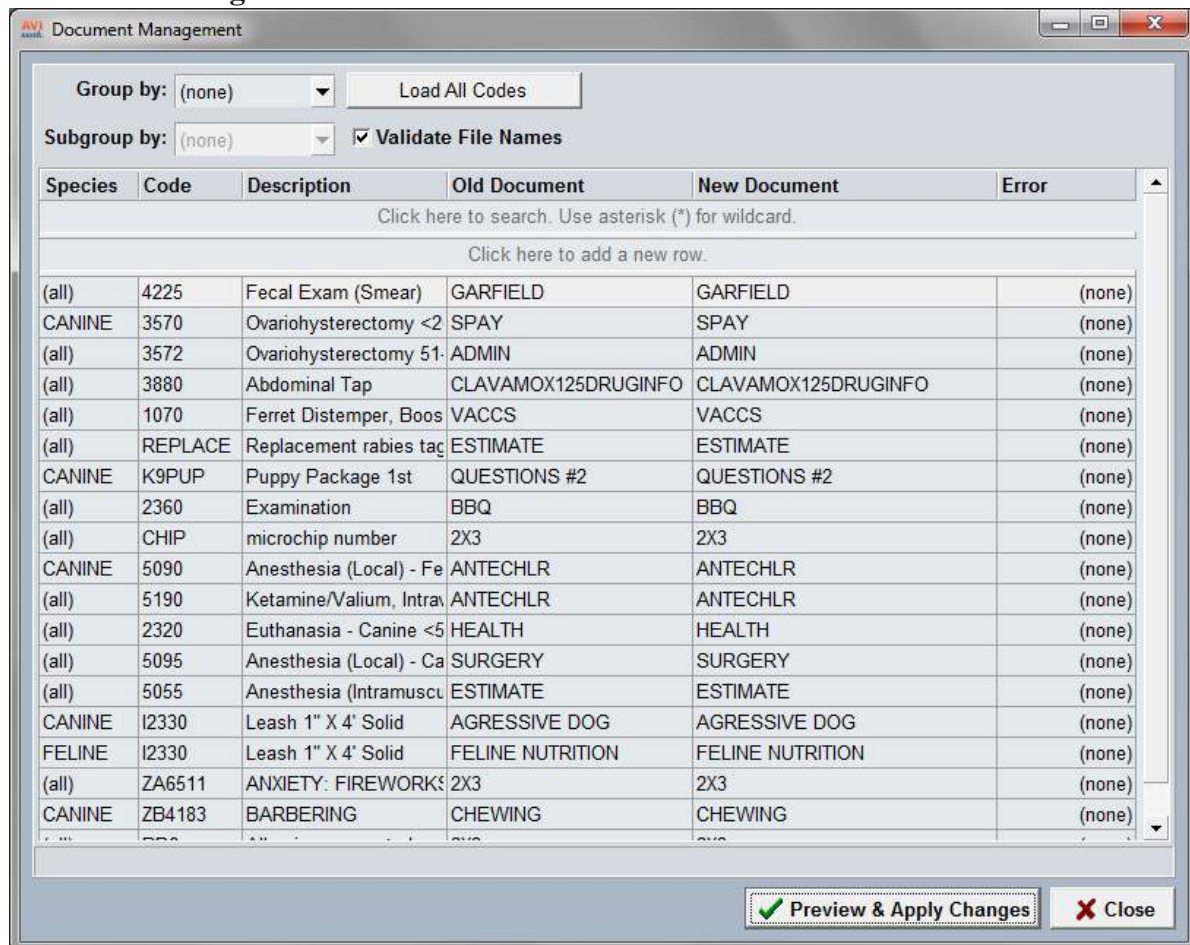
The Document Management area allows users the ability to add, remove, update, or switch documents for all treatments, items, diagnoses, and problems from one location.

In this chapter you will learn about...

- » Document Management Window on page 437
- » Lifelearn on page 441

To launch the Document Management window, select Services, Document Management. This area will default to opening Tx, Items, Dx, and Problems that have document associations.

Document Management Window



- **Load All Codes** – Will load all AVImark treatment, item, diagnosis, and problems codes, including those without associated documents.
- **Load All Lifelearn Documents *only visible for Lifelearn users*** – Will load all Lifelearn documents, including those that are not associated to any treatment, item, diagnosis, or problem.
- **Lifelearn ClientEd Update *only visible for Lifelearn users*** – Will compare your current Lifelearn documents to currently available documents from Lifelearn, and update/replace any necessary. These changes will appear in the Document Management area only, and not applied to the AVImark database until changes are applied. This will allow users the opportunity to make any personalized changes before using the Preview and Apply button to make the changes permanent.

- Lifelearn ClientEd Online link ***only visible for Lifelearn users*** – will launch the Lifelearn site (www.lifelearn-cliented.com/).
- **Group by** – Will allow you to group the displayed entries by the following methods:

- Species : FELINE				
FELINE	PR95	Declaw--2 front feet	DECLAWING_IN_CATS_-_BEHAVIOR	(none)

- Species
- Code
- Old Document
- New Document
- Error Code
- **Subgroup by** – Will allow you to further categorize displayed entries if a “Group by” option has been selected. These subgroup options are:
 - Species
 - Code
 - Old Document
 - New Document
 - Error Code
- **Validate File Names** – When checked will verify document names in the New Document field before applying. Any document name entered that does not exist in the My Documents folder will cause a warning prompt upon clicking Preview & Apply Changes.

Document assignment

- Select a line entry for which you wish to make a document modification.
 - To add a document to an AVImark code with or without a current document displayed in the Old Document field, click in the New Document field, and select the ellipsis.
 - This will open to display the documents contained in the My Documents folder allowing you to make your document selection, and click OK.
 - You will now see your document selection in the New Document column.
 - To remove a document from an AVImark code, click in the New Document field and swipe out the document name.

NOTE: If at any time you wish to revert to the document listed in the “Old Document” field, simply click into the Old Document field for that line entry and select the double right arrow. This will reassign the document name as it was prior to the change. However this **ONLY** applies to changes that have not yet been applied.

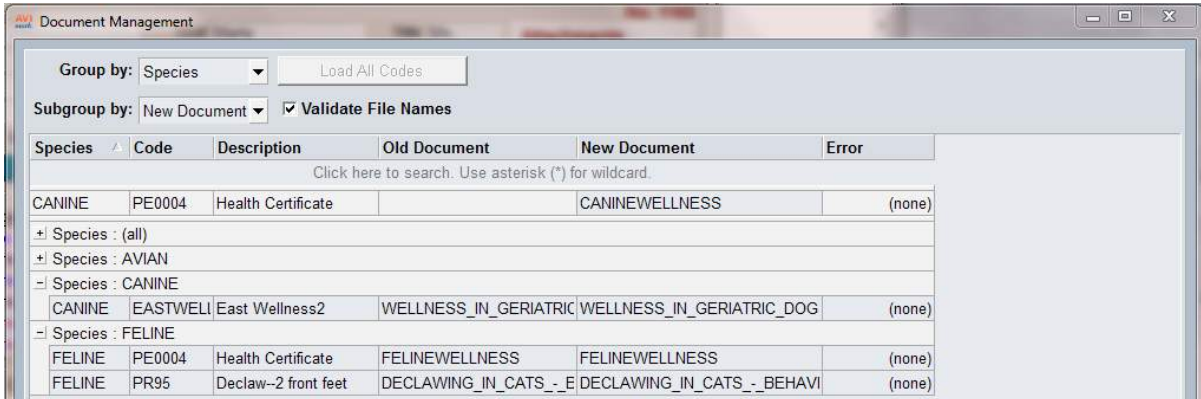
- Species : FELINE				
FELINE	PR95	Declaw--2 front feet	DECLAWING_IN_CATS_-_BEHAVIOR	DECLAWING_IN_CATS_-_BEHAVIOR (none)

- When all document additions, modifications, and removals have taken place, select Preview & Apply Changes. This will open the Preview Changes window displaying all changes that will be made in your database. Selecting Proceed will confirm and process the changes. Pressing Cancel will return you to the Document Management window to make further changes.
- If any of the attempted changes are invalid, you will be notified when Preview and Apply Changes is selected, and will be returned to the Document Management window. The offending entries will display the error in the error column. Once all corrections are made, the Preview and Apply Changes process can be attempted again.

NOTE: Offending document entries can be easily identified if the Document Management window is grouped or sub-grouped by Error Code. Error code grouping is automatically applied when an error occurs during

processing.

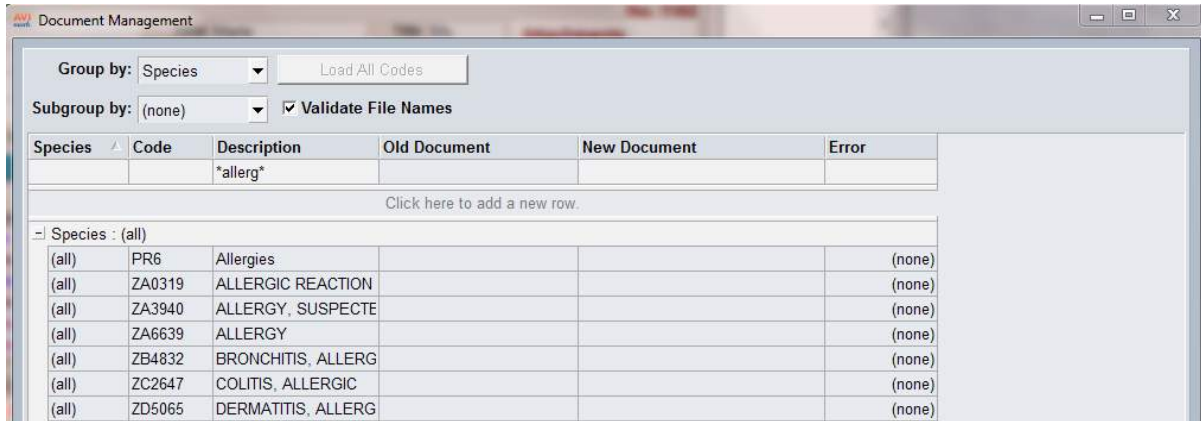
- Adding one or multiple species specific documents to an AVImark code can be accomplished, however you cannot add more than one document per species to an AVImark code. For example, your AVImark treatment may have two documents assigned, one each for canine, feline, but cannot have two feline entries.
 - To add a species specific document to an AVImark code entry that does not currently have a document attached, select the AVImark line entry, and choose the desired species from the Species drop down list. Then make your document selection to be attached.
 - If an AVImark code has a saved document, you cannot change the species assignment for that line entry; however, you can create a new line entry for that AVImark code and make your species association on that new entry.
- To create the new line entry, click into the row labeled “Click here to add a new row.”
- Each field has the ability to enter or select the appropriate information.
 - Click into the Code field and type in the exact AVImark code or you may choose to use the ellipsis to open the Select Entry Code window to make a selection.
 - From within the Select Entry Code window a list of Treatments, Items, Diagnoses, and Problems can be displayed by entering some or all of description until the desired code is displayed.
 - Highlight the entry and click OK. You will be returned to the Document Management window with your Code and Description fields filled on your new row.
 - Select the applicable species option from the Species field.
 - Select the desired document.
 - When all fields are complete, press Enter on your keyboard and your new line entry will be complete.



- Search fields have been added to allow users to locate and display all entries meeting user specified criteria. By clicking on the row labeled “Click here to search” in the field representing the area for which you wish to search, you can enter identifying information. All entries in the Document Management area meeting your search criteria will be displayed. The example below shows I used Declaw as my search criteria in the Description field and the resulting search results.



- The “Use asterisk (*) for wildcard” option allows you to match a partial word or description by placing an asterisk before and after the search entry. An example would be you wanted to find all AVImark code descriptions containing allergy or allergies. You could enter *allerg* in the Description column on the Search row, hit the Tab or Enter keys, and all entries in the Document Management window meeting that criteria will be displayed. The below example shows the resulting Lifelearn documents when searching the New Document field for *ALLERG*, when the “Load All Lifelearn Documents” option was used.



The screenshot shows the AVImark Document Management interface. At the top, there are controls for 'Group by' (set to 'Species') and 'Subgroup by' (set to '(none)'). A 'Load All Codes' button is visible. Below these is a search row with the entry '*allerg*' in the 'Description' column. A table below displays the search results, showing columns for Species, Code, Description, Old Document, New Document, and Error. The results are grouped under 'Species : (all)'. A link 'Click here to add a new row.' is also present.

Species	Code	Description	Old Document	New Document	Error
		allerg			
Click here to add a new row.					
- Species : (all)					
(all)	PR6	Allergies			(none)
(all)	ZA0319	ALLERGIC REACTION			(none)
(all)	ZA3940	ALLERGY, SUSPECTE			(none)
(all)	ZA6639	ALLERGY			(none)
(all)	ZB4832	BRONCHITIS, ALLERG			(none)
(all)	ZC2647	COLITIS, ALLERGIC			(none)
(all)	ZD5065	DERMATITIS, ALLERG			(none)

LIFELEARN

The Lifelearn ClientEd Document feature in AVImark allows a more user friendly application by streamlining document assignment and better access to the most current client handout documents.

For Lifelearn ClientEd purchase information and installation assistance, please contact our MSS Sales department at 877-838-9273, option 2, submenu 4. A member of our Sales Team will assist you with downloading and installing the following files:

The following files will be downloaded and placed in the AVImark directory:

- ArticlesToDP.xtr
- LL05to09
- A Lifelearn subdirectory must be added to your existing My Documents folder within the AVImark directory. It is necessary for this Lifelearn folder to be a **subdirectory to the My Documents** folder. This Lifelearn directory will contain:
 - Lifelearn_ClientEd_Sync.jar
 - Lib folder containing the following two files:
 - appframework-1.0.3.jar
 - swing-worker-1.1.jar

In order to begin using this feature, it is necessary to possess login credentials provided by Lifelearn. These credentials can be obtained by contacting 1-800-375-7994 or sales@lifelearn.com.

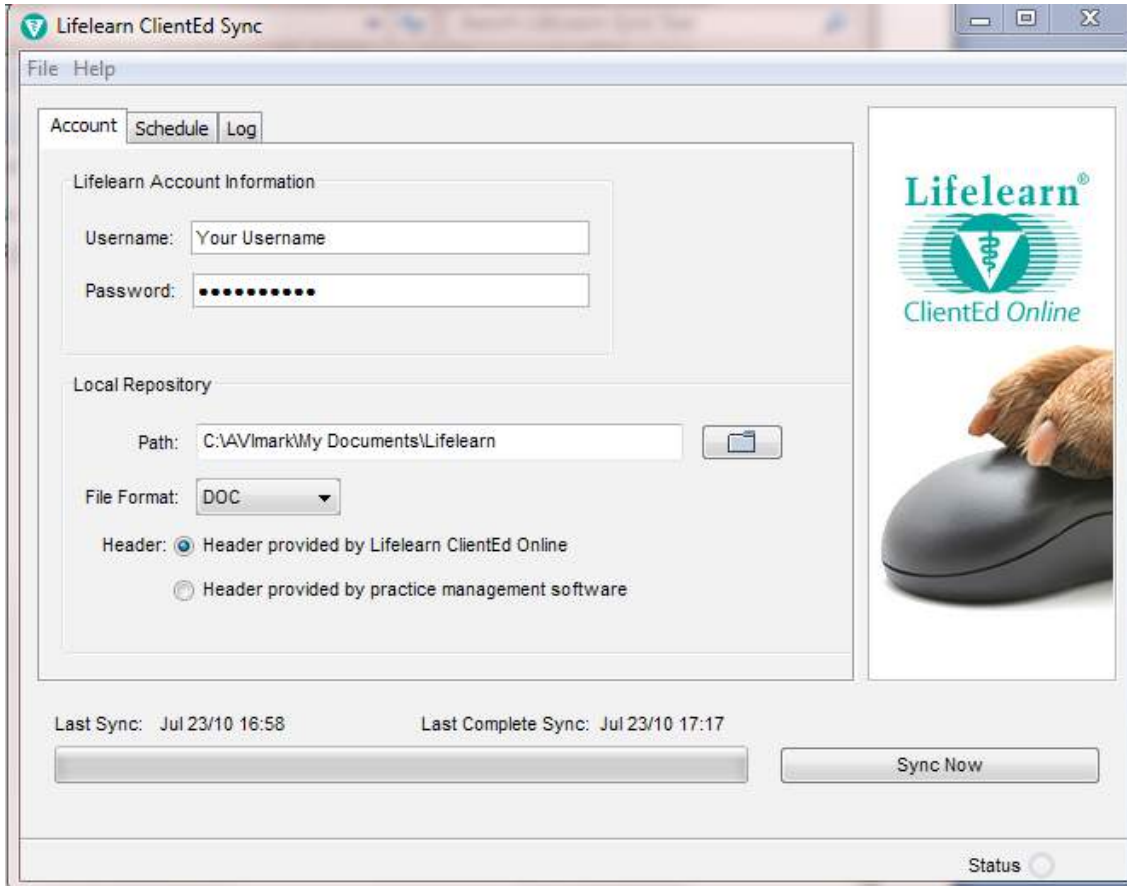
Setup

In AVImark, you will need to verify the path to the Lifelearn Files Path directory. This can be accomplished by the following:

- Launch Advanced Options, and enter Lifelearn in the Search field.
- Verify the path for the Lifelearn folder. It is important that the Lifelearn folder is a subdirectory of the My Documents folder within AVImark. The path will be simply “LIFELEARN” using the recommended setup.

The Lifelearn Sync tool will be used to activate your integration and sync the complete up-to-date list of Lifelearn Handout documents with your AVImark/Lifelearn directory. Please use the following steps:

- Open the Lifelearn folder located as a subdirectory of your AVImark My Documents folder.
- Locate the Lifelearn_ClientEd_Sync.jar, and double left click on it.
- You will be presented with the Lifelearn ClientEd Sync window.
- Enter the username and password received from Lifelearn in the Lifelearn Account Information fields.
- In the Local Repository section, browse to the Lifelearn folder stored within your AVImark My Documents folder to set the path.
- Select DOC in the File Format field.
- Header provided by Lifelearn ClientEd Online should be selected to allow your hospital header to be printed with each document.
- Press Sync Now. This will sync all current Lifelearn ClientEd documents to your Lifelearn folder.



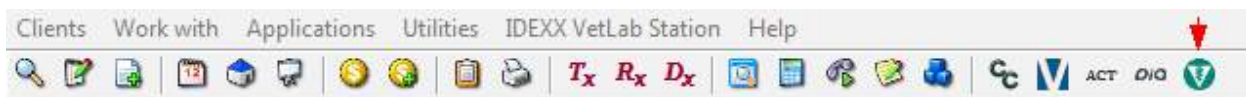
AVImark Species settings

- It will be necessary to assign your Lifelearn Species to your AVImark Species Table. Please use the available species options found in the Lifelearn Species drop down list in the Change Species window.

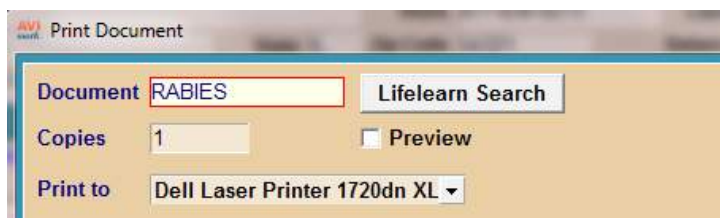
Feature use

Lifelearn ClientEd Document Search window – A new area has been provided to allow users the ability to search for the desired Lifelearn document. This window has been made available from multiple locations.

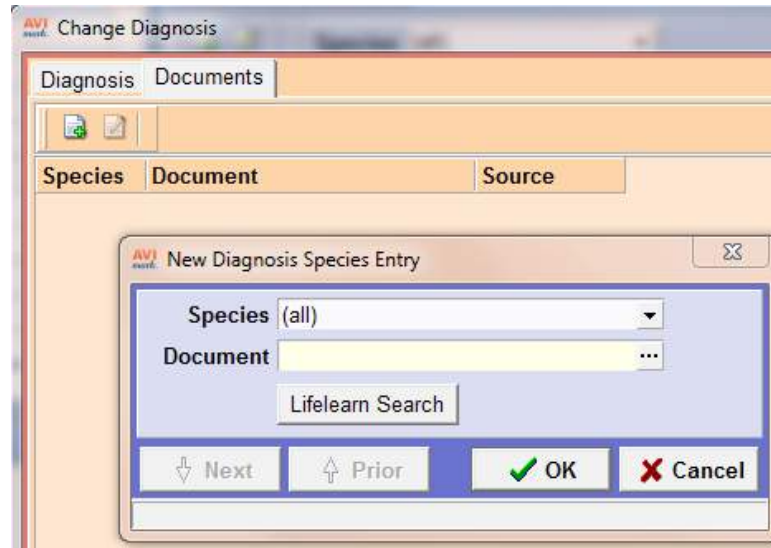
- From the AVImark CID you can access the Lifelearn ClientEd Search and Print utility by using the new Lifelearn Speedbar button.



- The AVImark Print Document window provides a Lifelearn Search button.



- The AVImark Change Item, Treatment, Diagnosis, and Problem windows all have the Lifelearn Search button located in the New Document window of the Documents tab.



- The Lifelearn ClientEd Document Search window offers several search options for locating, sorting, and filtering, Lifelearn documents.

Each of these options are able to be used by entering information in their respective fields. By clicking in a field listed above, the Index search window is automatically updated to display selection options appropriate for that field. Double clicking on an Index menu entry will allow that entry to be added to the chosen field. When entries are selected, click the Search button to display all Lifelearn documents that meet the selected criteria. Multiple entries are able to be selected, however only documents meeting **all** selected criteria will be displayed. For example, In the Topics field, select Breeding, then select Conditions, and press the Search button. You will only be presented with a list of documents that meet **both Breeding and Conditions** criteria, instead of Breeding or Conditions.

Once the desired document is found, double left clicking will open the Print window so the document can be previewed or printed.

CHAPTER 39: WORK LIST

AVImark lets you define a Work List of jobs that would typically be assigned to appropriate staff to perform depending upon their abilities. For example: Update medical records; feeding; blood samples; recording vital signs, and so on. This list of jobs is up to you and may be defined in your System Tables. The Work List window is a free floating window that works along side the CID. Also if the Work List is left open and a patient is open on the CID, if the patient is on the Work List AVImark will automatically select the patient on the Work List.

In this chapter you will learn about...

- » Accessing the Work List on page 445
- » Toggling Between Lists on page 445
- » Manually Assign a Patient to Work List on page 445
- » Automatically Link a Patient to a Work List on page 446
- » Enter/View Work List Notes on page 446
- » Use the Work List on page 447
- » Posting Work List Entries on page 447
- » Renew a Patient on the Work List on page 447
- » Go to the Selected Patient on page 447
- » Transfer a Patient to Another List on page 447
- » Additional Work List Options on page 448
- » Add Patient to Work List at Check-In on page 448
- » Work Lists More Stuff on page 449

Accessing the Work List

The Work Lists can be accessed by using one of two methods:

- From the CID menu area select **Clients, Work Lists**. You can then choose the list you want AVImark to display. The shortcut keys **Ctrl+Alt+F10** can also be used to open the lists.
- Or in the Patient area, **right-click** to display the shortcut menu, and point to **Lists** and click the appropriate **Work List** name.

Toggling Between Lists

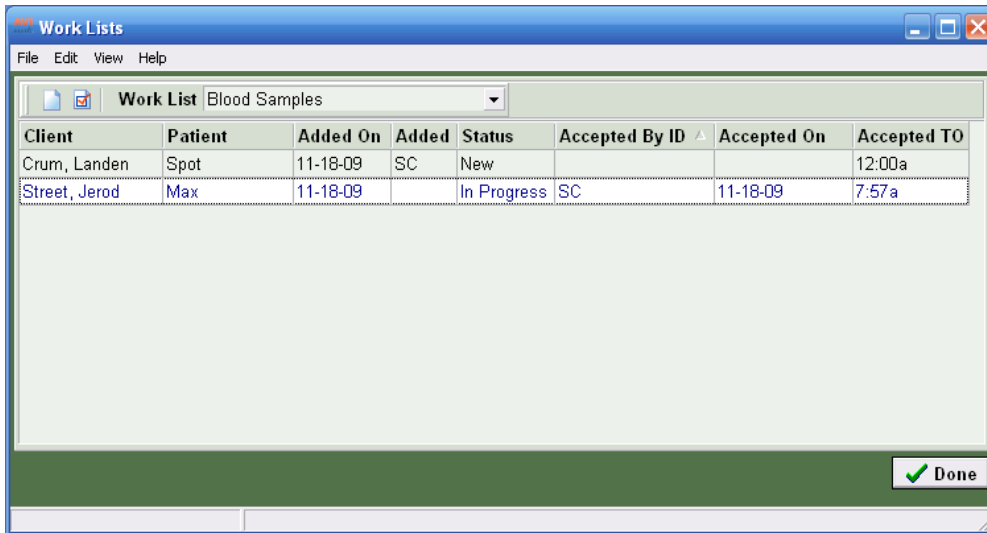
Once a Work List is open you can easily toggle between the lists you have defined.

- In the Work List click on the **Work List** drop-down arrow and select the list you wish to display.
- Or in the list press **Shift+Tab** until the Work List field is highlighted. In this field simply type a few characters of the list name you want to display and AVImark will display the list and the associated entries.

Manually Assign a Patient to Work List

You may manually assign a patient to any number of Work Lists so that a staff member may view or print a list of patients on the list(s) that is their job to perform.

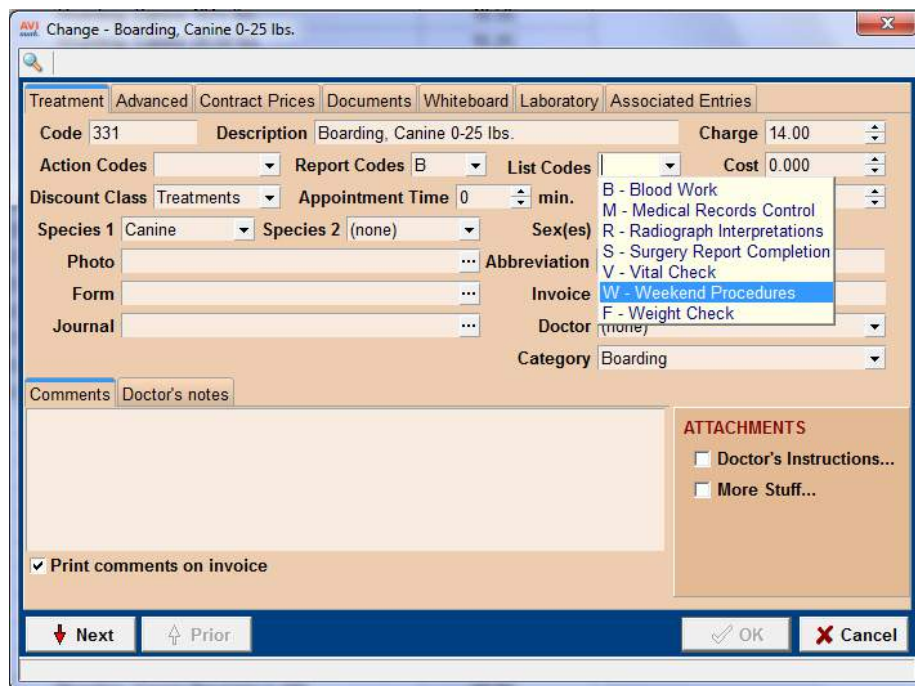
- In the Patient area, **right-click** to see the shortcut menu. Point to **Lists** and click the correct **Work List** name.



- From the Work List window, **right-click** and from the shortcut menu click **New** to include the patient on the list.

Automatically Link a Patient to a Work List

AVImark allows you to assign up to three Work Lists Codes to any treatment so that when you perform the treatment, the patient is automatically added to one or more Work Lists. For more information on assigning Work List codes, refer to “CHAPTER 3: TREATMENT LIST”.



Enter/View Work List Notes

- With the correct patient highlighted in the Work List window, **right-click** and from the shortcut menu click **Notes** to display the Notes window.
- Enter the notes about the job as related to the patient and click **Done**.
- To view notes in the Work List window, open the **View** menu and click **Preview Text**.

- Click the **Notes** option and click in the **Show Preview Text box**.
- After clicking **OK** AVImark will display the notes directly on the screen.

Use the Work List

- In the Patient area, **right-click** to see the shortcut menu. Point to **Lists** and click the correct **Work List**.
- With the correct patient highlighted **right-click** and from the shortcut menu click **Accept** to display the CID for that patient. The **Status** for the selected patient will be set to **In progress**.
- After the work is completed, select the correct patient from the list.
- **Right-click** and from the shortcut menu click **Remove** to remove the patient from the Work List.
- You will need to click **Yes** to confirm.

Posting Work List Entries

After a patient has been accepted on the Work List and you have attached notes you might find it beneficial to post the entry to the patients Medical History. This will store the attached notes in Medical History which helps in keeping efficient notes.

- Open the appropriate Work List and select the correct patient.
- **Right-click** and from the shortcut menu click **Post** to remove the entry from the Work List and post the notes to the patients Medical History.

After closing the list and opening the patients file on the CID you will see the notes entry displayed in the patients Medical History.

Renew a Patient on the Work List

When a patient has been accepted or removed from the Work List, the patient may be renewed/added back to the list.

If the patient has been accepted:

- Select the correct patient from the Work List.
- **Right-click** and from the shortcut menu click **Renew**. The **Status** for the selected patient will be set to **New**.

If the patient has been removed:

- From the Work List window, open the **Work List** menu and click **Show ghost** to display the removed patient.
- Select the correct patient from the Work List.
- **Right-click** and from the shortcut menu click **Renew**. The **Status** for the selected patient will be set to **New**.

Go to the Selected Patient

You may access any patient that is displayed on the Work List.

- Select the correct patient from the Work List.
- **Right-click** and from the shortcut menu click **Open Patient** to display the CID for that patient.

Transfer a Patient to Another List

You may transfer a patient from one Work List to another.

- With the correct patient selected in the Work List window, **right-click** to see the shortcut menu and point to **Change**.
- Click on the **Work List** drop-down arrow and select the Work List you wish to move the patient to.

- After clicking **OK** AVImark will transfer the selected patient to the Work List you had selected.

Additional Work List Options

The Work List can be customized to fit your needs by utilizing the customizable features and many features have been added to give flexibility when working in a Work List.

- In the desired Work List you can customize the displayed columns by selecting **View, Columns** from the **right-click** menu. Use this option to display or remove columns on the list.
- To select multiple entries highlight an entry and press the **Shift** key to select consecutive entries or use the **Ctrl** key to select random entries. You can then **Remove, Accept, Post** or **Renew** those entries by selecting the desired option from the **right-click** menu.
- To open the selected patients account open the **right-click** menu and point to **Open Patient**.

Add Patient to Work List at Check-In

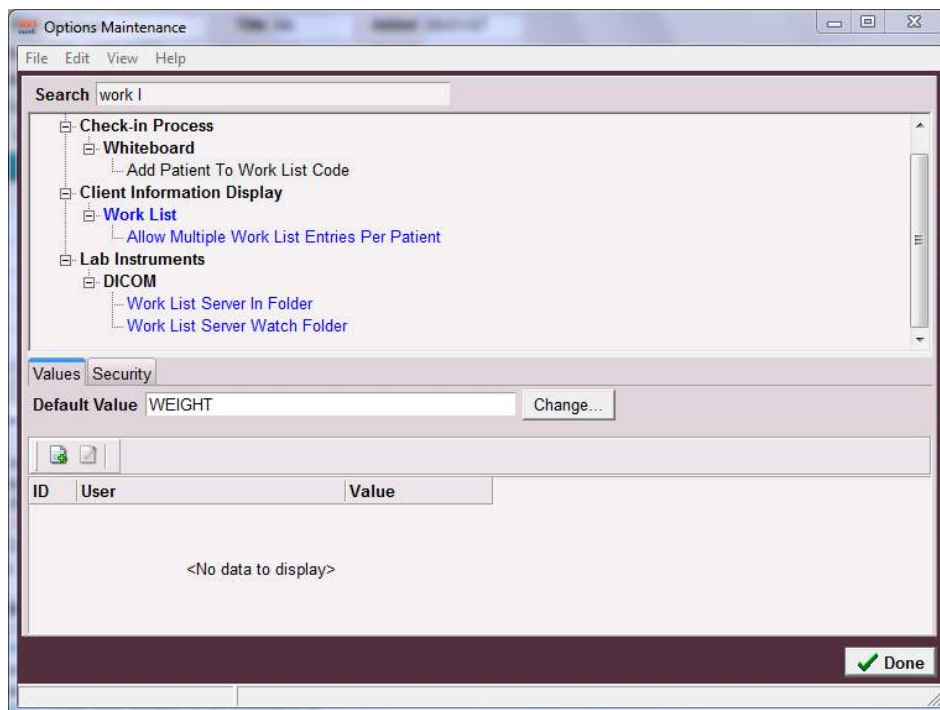
By utilizing an Advanced Option AVImark will allow you to add a patient to a Work List at the time they are checked in.

Set up

Before you set the Advanced Option you will need to open Work With, System Tables and locate the Work List table. Open the Change window of the appropriate Work List entry and make note of the code.

- From the CID select the **Hospital Advanced Options** speed bar icon.
- In the **Search** field type **work** and select the entry **Add Patient to Work List Code**.
- Once the entry is selected click **Change** under the **Values** tab.
- In the **Value** field type the code of the Work List you want to add the patient to at the time they are checked in.

Once the pet is checked in they will automatically be added to this Work List.



Work Lists More Stuff

AVImark gives you the ability to create Additional Data Fields that can be utilized in the Change Work List window.

Setup

The additional data fields must be defined in System Tables.

- From the CID menu area select **Work with, System Tables**.
- Under the Table area click on the **Additional Data Fields** table and click once on the **Additional Work List Fields** entry.
- To begin creating additional data fields **right-click** and select **More Stuff Fields** from the menu.
- Enter the desired fields and click **OK** to save them and then click **Done** to close the window.

To have a blank field for typing information you will want to use the type of Phrase when defining the data field.

Using Additional Fields

After the fields have been defined they will appear in the Change Work List window.

- From the CID, **Patient** area open the desired **Work List**
- In the Work List highlight an entry, **right-click** and select **Change** from the menu.
- The additional field will appear at the bottom of the Change window ready for you to enter the desired information.

By utilizing the Columns feature you can display the defined Additional Data Field as a column on the Work List.



To learn more about:
Patient Work List

Search the Help for:
Work List Table

CHAPTER 40: AVIMARK EQ

In this chapter you will learn about...

- » Client Selection on page 451
- » Hospital Setup Advanced Options on page 452
- » System Tables on page 453
- » Split Billing on page 456
- » Patient Area on page 457
- » Microchip ID Prompt on page 463
- » Treatment and Inventory List Features on page 463
- » Appointment Calendar on page 463
- » Word Processing and Documents on page 466
- » Hoof Chart on page 466
- » Dental Chart on page 468

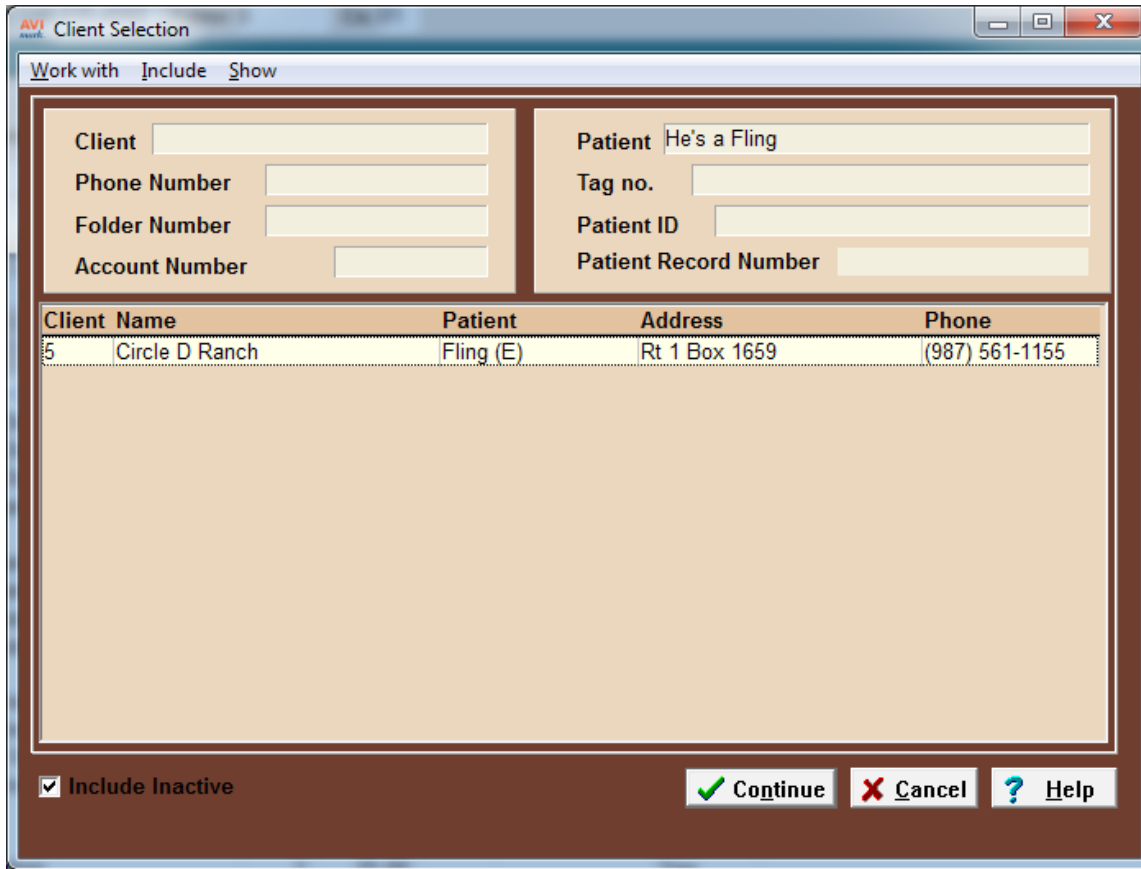
Client Selection

The ability to search for the patient's Registration Name or Barn Name can be done by entering one of the names in the Patient field of the Client Selection Window.

- This Registration Name is specified in the **Equine tab, Registration tab** of the New/Change Patient Information window.
- In the Client Selection window click in the **Patient** field and enter the appropriate name.



The equine patient fields are searchable through the Information Search feature.



Client Name	Patient	Address	Phone
5	Circle D Ranch	Fling (E)	(987) 561-1155

Hospital Setup Advanced Options

Appointment Calendar Options

There are new advanced options added for the Appointment Calendar. These options are:

Print Directions Separately

- From the **Advanced Options** maintenance window search for **Directions**.
- Selecting the Option to **Print Directions Separately** and setting the value to **True** will print your directions after printing your appointments for the day.
- If you select **False** it will print them all together.

Appointment Proximity Searching

- From the **Advanced Options** maintenance window search for **Proximity**.
- Selecting the option **Use Proximity Searching** and setting the value to **True** will allow you to schedule appointments in the same area at the same time.

Appointment Proximity Searching Days.

- From the Advanced Options maintenance window search for Proximity
- Selecting the option Number of Days to Search and setting the value to a specific number will allow you to search for the set number of days for appointments in the same proximity as the appointment in which you are making.

Invoice and Patient Chart

Additional advanced printing options have also been added.

Print the Registered Name on Invoice

- From the **Advanced Options** maintenance window search for **Registered Name**.
- Selecting the option **Print the Registered Name on Invoice**, setting the value to **True** will allow you to print the patient registered name on the Invoice and not the barn name of the patient.
- If no registered name is found, AVImarkEQ will print the pet’s barn name.
- If the value is set to **False** it will print the Barn Name of the patient on the Invoice.



Microsoft Bing Maps

Advanced Options have been added for the Mapping Feature.

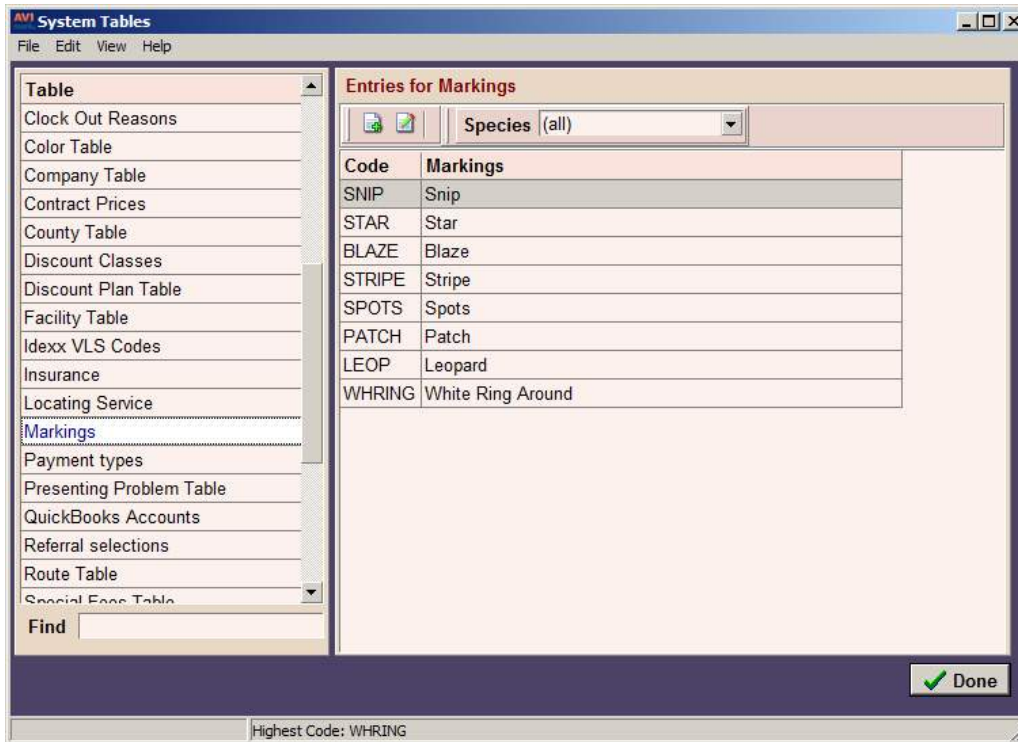
- From the **Advanced Options** maintenance window search for **Mappoint**.
- Enter the **Mappoint Username** and **Mappoint Password** given to you by an AVImark Equine Technician to define the appropriate information to use with the Mapping feature within AVImark.

System Tables

Markings Table

A new Markings table in System Tables allows you to add markings for specific areas of the patient’s body.

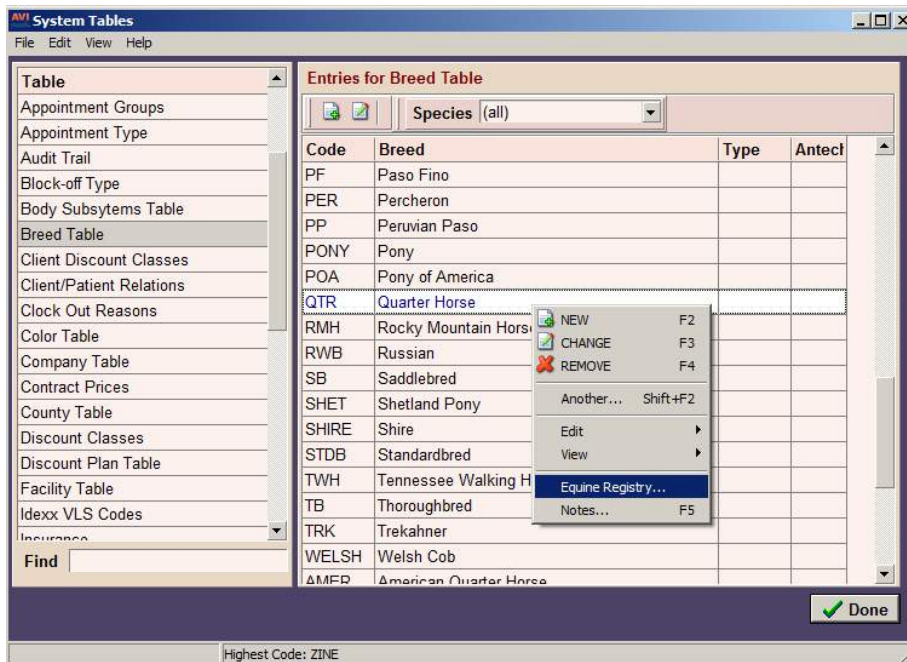
- Add an entry by **right-clicking** under the Entries for Markings area and select **New**.
- Begin adding the detailed information for the marking. These entries will appear in the Equine tab, Identification sub-tab of the New/Change Patient window where you can select the markings for the animal.



Breed Table

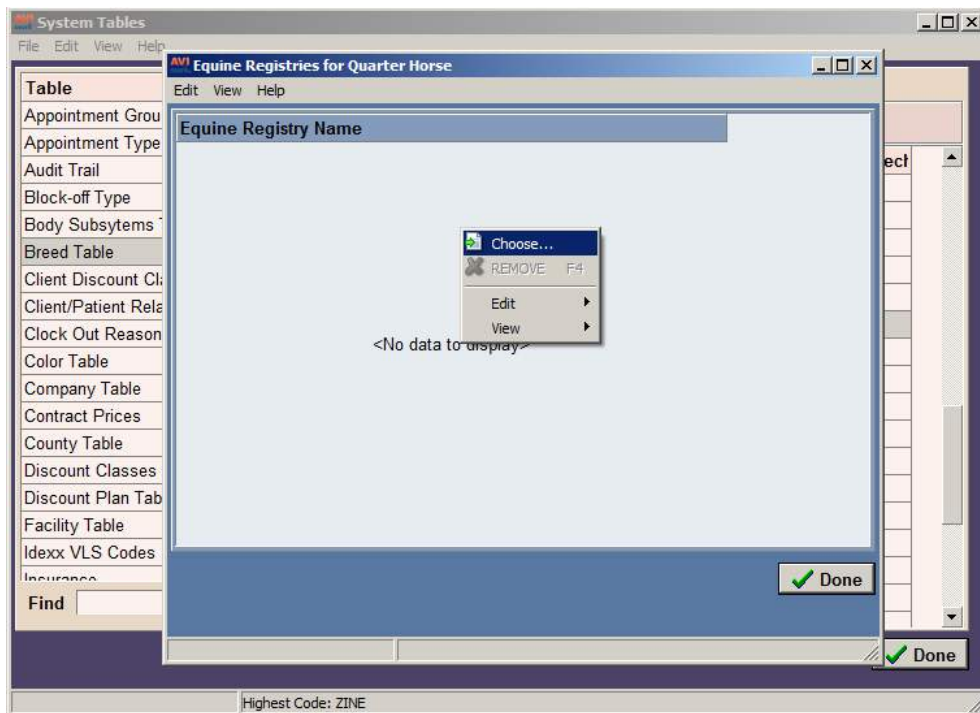
The Breed table will now allow you to access the Equine Registries; from this area you can also access the website of the registries and view registries associated with this breed.

- Select the desired breed and **right-click, Equine Registry**.

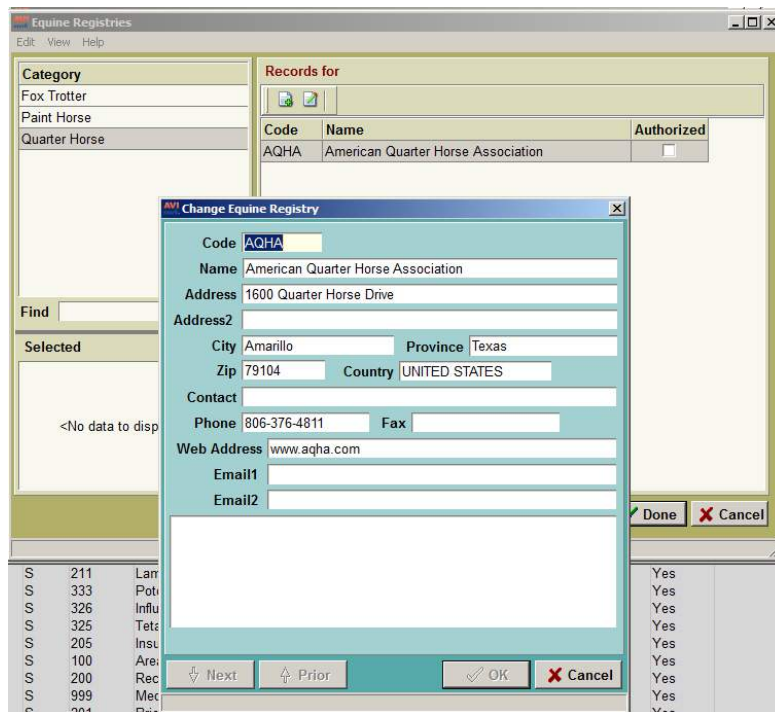


From the displayed window you will be able to define the necessary information for the Equine Registry.

- Next you will **right-click, Choose**.



- Under the **Records for** area select **right-click, New** to define the new information on the equine registry.

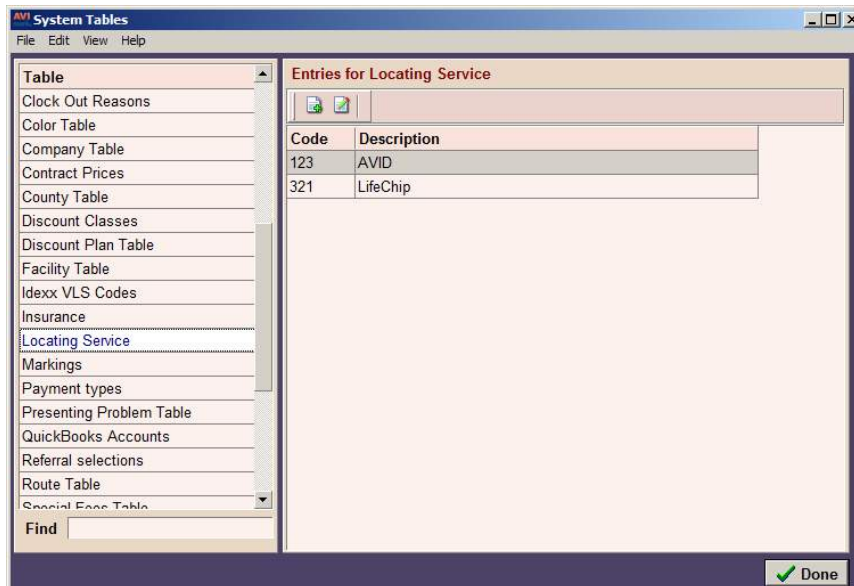


Locating Service Table

The Locating Service Table allows the user to place the name of the Microchip company that the patient's chip is registered with, for example AVID. This information will link into the change patient window on the Equine

tab, Supplemental sub-tab.

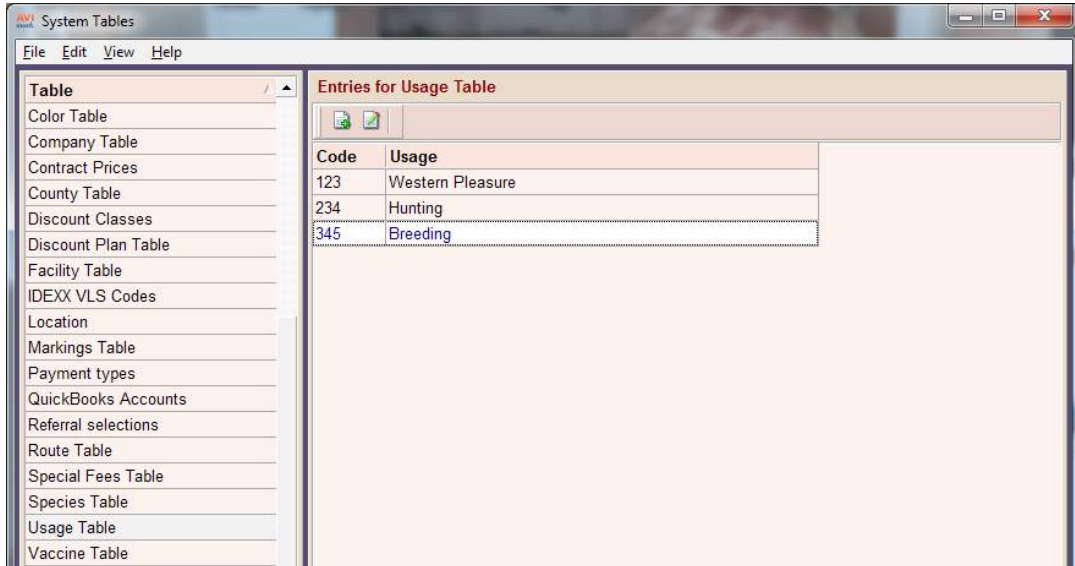
- From System Tables select the **Locating Service** Table
- **Right-click** select **New** under the Entries area to begin adding a Locating Service.
- After the appropriate information is entered click **OK** to add the entry.



Usage Table

In order to identify what the animal is used for, such as breeding, barrel racing, trail ride, etc., the user can create entries in the Usage Table then from the Equine tab, Supplemental sub-tab of the New/Change Patient information window identify the appropriate usage for the patient.

- Select the **Usage Table** in System Tables
- From the Entries area **right-click**, **New** to create a usage entry.
- Specify the Code and Description then click **OK**.

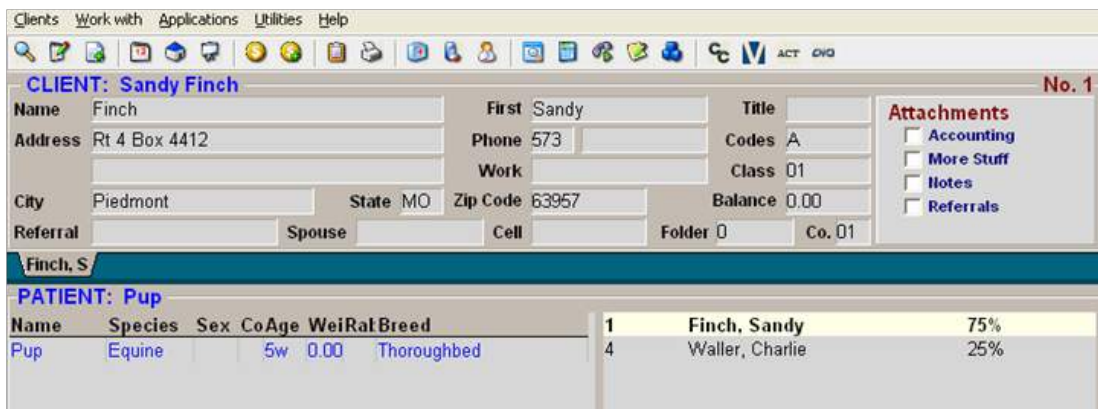


Split Billing

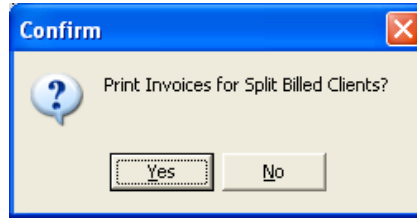
Prompt

There are additional split billing options available. You must first define the Ownership details for the patient, as shown below.

- If the client comes in, and they have ultimate authority ownership, and you need to print an invoice for this client you will receive a prompt after printing the first invoice stating **“Print Invoices for Split billed Clients”**.
- Selecting **Yes** to the prompt it will print the other clients invoice
- Selecting **No** to the prompt will not print the second invoice.

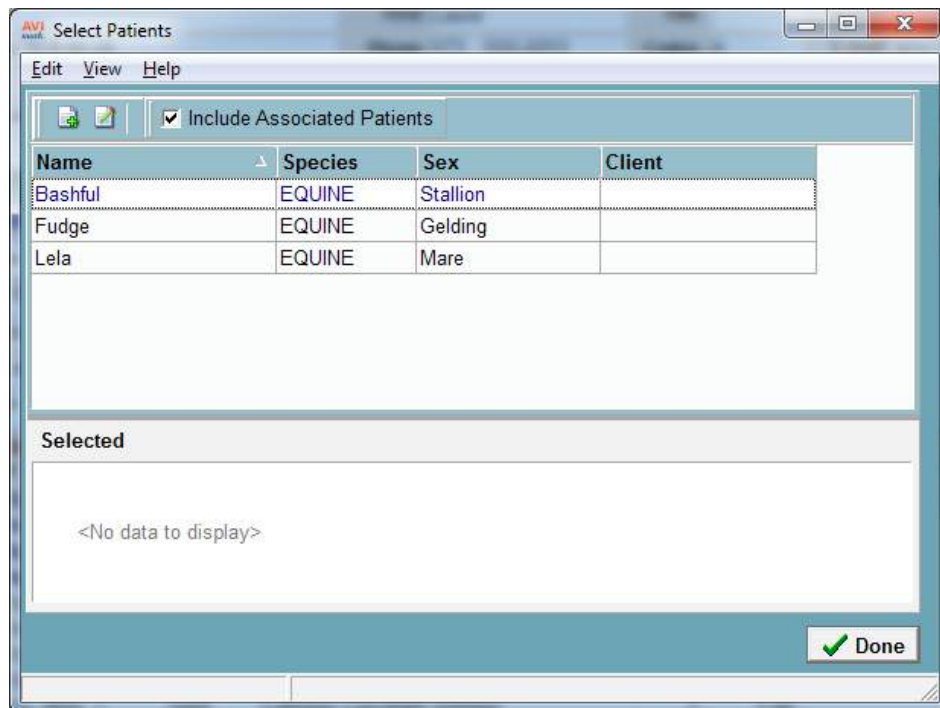


This is the prompt that will appear:



There is also a new Action Code which will allow you to split the price of an inventory item or treatment between specific split billed clients. The **6** action code will need to be added to a treatment or inventory item in order to split these prices.

- **Right-click, Change** on a treatment or item in the appropriate lists and assign the **6** action code.
- Enter that treatment or item in a patient's Medical History.
- You will receive the following window and will press your **Spacebar** to select the patients you would like to split the price between.

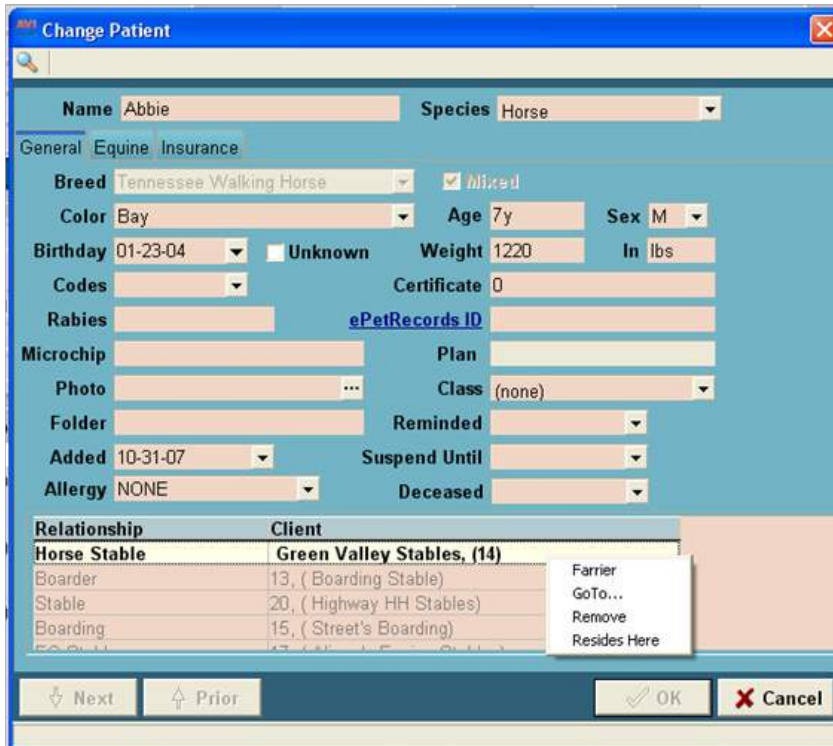


Patient Area

Client/Patient Relations


In the New/Patient window there has been an option added to the Client/Patient Relationship information.

- From this area you can associate the **boarding stable** and or **trainer** in which the patient is located.
- To identify the pet has a relationship with another client select the appropriate Client Relation entry and press the **Spacebar**.
- To use the client/patient relationship feature you must define the relationship entries in System Tables in the Client/Patient Relations table.

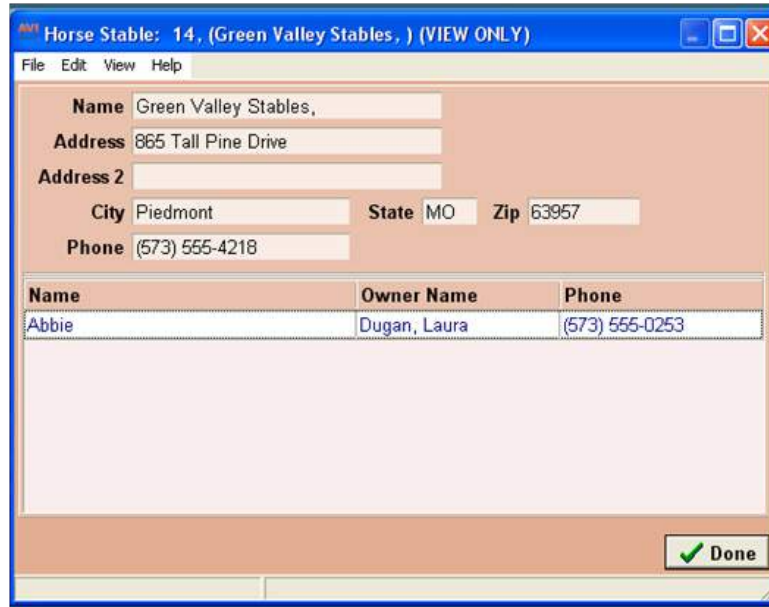


Additional options have also been added to the client/patient relationship area of the Patient information window.

- **Right-click** in the **Relationship** area to select a **Default Farrier**. When you have selected a Farrier the entry will be shown in **Red** so that you can identify the default Farrier, only one default can be selected.
- From this area you can also **right-click** and select **Go To**, which will open the related clients account you selected.
- Select **right-click, Remove** to remove the client and patient association. This does not remove the Relation entry from the list, it simply dissolves the specified relation.
- Select **right-click** option **Resides In** to learn the physical location of the patient when making an appointment for them.

 You must be utilizing the Mapping feature in AVImark EQ in order to use this function.

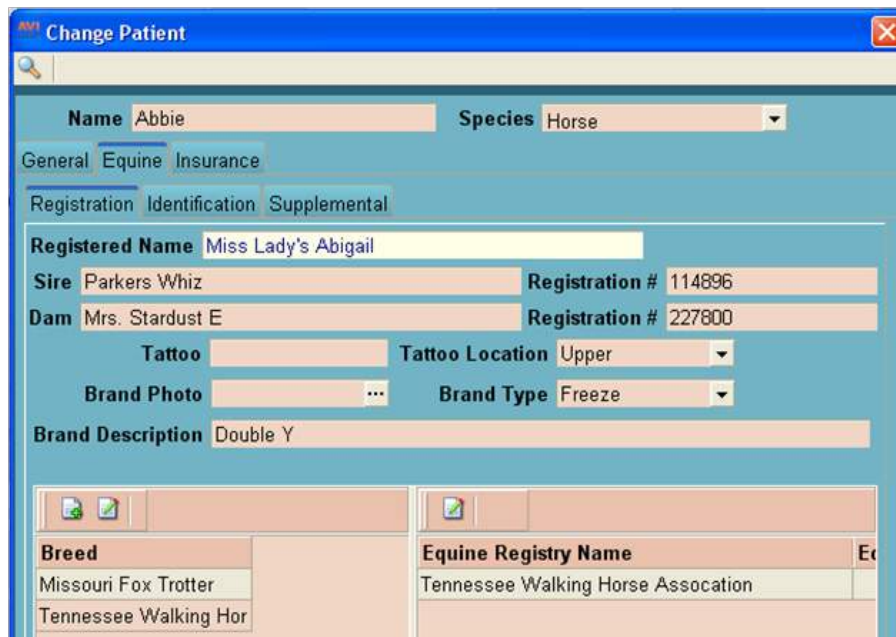
- If you **double left-click** on one of the names in the client/relationship area it will display the window shown below. This window cannot be edited, it is designed to allow the user to view the information for that specific Trainer, Stable, or Farrier and it will also list anyone else in your data that is associated with the facility.



When the animal has the species of Equine, you can select the Equine tab that will appear under the Name field. This will allow access to fields where specific information can be defined for the equine pet.



Registration Tab



- **Registered Name** for the registered name of the patient.
- **Sire** the Sire's Registration Name.
- **Sire Registration Number**
- **Dam** for the Dam's Registration Name.
- **Dam Registration Number**
- **Tattoo** if the patient has a tattoo the tattoo number can be entered here.
- **Tattoo Location** will allow you to select from a drop down that contains the options, **upper** and **lower**.
- **Brand Photo** this will allow you to attach a photo of what the animals brand looks like.
- **Brand Type** will allow you to select from a drop-down list that gives the options, **hot iron** or **freeze**.
- **Brand Description** will give you an area to create a brief description of the brand. The Brand Description field will hold up to 255 Characters and will allow you to use the arrows on the keyboard to scroll up and down in this field.

Breed Window: listed in this field will be the breed of the animal. In the instance where the animal is a mixed breed you can select multiple breeds for the equine pet.

- By doing a **right-click, New** in this window it will allow you to type in a specific breed.



- On the appropriate breed right-click select Primary Breed. This will allow you to specify the primary breed for the animal when it is a mixed breed. AVImark will display the Primary Breed in the Breed field of the Change Patient window and also on the CID, Patient area.



Equine Registry Name: In this area you can have AVImark list the Equine Registries for the breed(s) of the pet. The Equine Registry information is defined in the System Tables, Breed table on the chosen breed.

- To choose an Equine Registry Name directly from this area, **right-click** select **Choose**. This will re-direct you to the Equine Registries allowing you to choose the appropriate associated name.
- After displaying the Equine Registry for the breed use **right-click, Change** to enter the **Registry No**

for the registry you have selected.

- From this area use **right-click, View Registry** to view the Equine Registry information that was defined in System Tables, Breed Table.

Identification Tab

Under this tab use the desired fields to click on the drop-down lists and choose the appropriate patient description.

The screenshot shows the 'Change Patient' dialog box with the 'Identification' tab selected. The 'Name' field contains 'Abbie' and the 'Species' dropdown is set to 'Horse'. Below the tabs, there are several color and marking fields:

- Body Color: Bav
- Tail Color: Black
- Eye Color: (unspecified)
- Mane Color: Bay
- Hoof Color: (unspecified)
- Scelera Color: (unspecified)
- Body Markings: (unspecified)
- Head Markings: Stripe
- Hoof Markings: (unspecified)
- Skin Markings: (unspecified)
- Left ForeLeg Markings: (unspecified)
- Right ForeLeg Markings: (unspecified)
- Left HindLeg Markings: (unspecified)
- Right HindLeg Markings: (unspecified)

At the bottom, there are 'Next' and 'Prior' buttons, and 'OK' and 'Cancel' buttons. A 'Modified' status bar is visible at the very bottom.

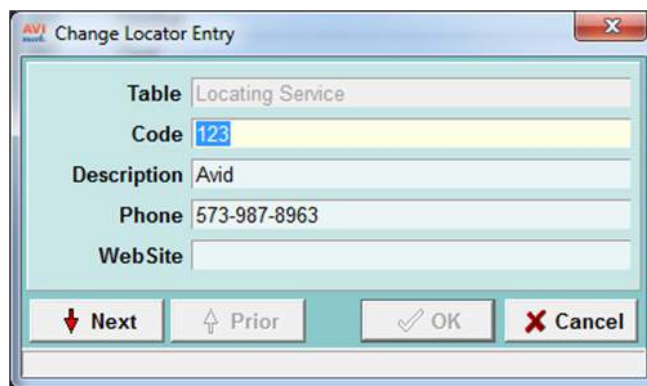
- **Body Color:** Over all body color of the patient
- **Tail Color:** Tail color of the patient
- **Eye Color:** The eye color of the patient
- **Mane Color:** The mane color of the patient
- **Hoof Color:** The color of the patients hoofs
- **Scelara Color:** Considered the white of the eye
- **Body Markings:** Markings on the patients' body
- **Head Markings:** Markings on the patients' head
- **Hoof Markings:** Any markings on the patients' hooves
- **Skin Markings:** Any skin markings the patient may have

- **Left ForeLeg Markings:** Markings that on the patients' left foreleg
- **Right ForeLeg Markings:** Markings on the patients' right foreleg
- **Left HindLeg Markings:** Markings that appear on the patients' left hind leg
- **Right HindLeg Markings:** Markings on the patients' right hind leg

Supplemental Tab



- **Height:** This will allow you to store the patient's height. The measurement will be displayed in hands or inches. When printing anything that shows the height for the Equine species it will display the height measurement in hands and or inches.
- **Usage:** Required by many states for inclusion in vet records is Usage information. The usage entries are defined in the Usage Table located in System Tables.
- **Locating Service:** This will allow you to select locating service the patient is currently using from a drop-down list. The locating service's that appear in this drop-down will be defined in System Tables under the Location Table. Below is the entry window that appears in System Tables.



- **Authorized Visitors:** This area is available to list the authorized visitors for the patient. This information will only be visible from the Patient area on the Supplemental tab and will not print in any area of AVImark.

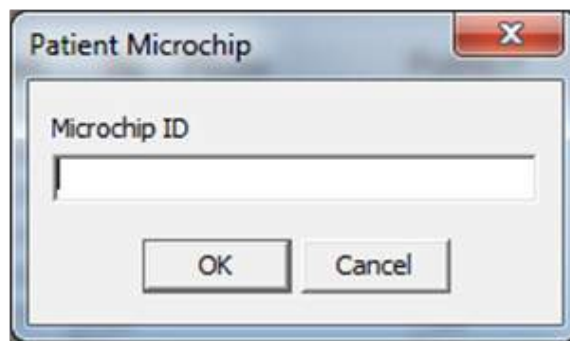


The equine patient fields are searchable through the Information Search feature.

Microchip ID Prompt

An action code can be used to auto-prompt a Microchip window when a specific service is added to the pets Medical History.

- From System Tables select the **Location Table**
- Choose **right-click, New** to create the new Locating Service and click **OK**.
- In the Treatment List **right-click, Change** on the desired treatment and assign the [action code to prompt for microchip.
- Next enter the treatment in Medical History and you will receive the following prompt:



- When you enter the Microchip number you will receive the following prompt:



Treatment and Inventory List Features

- You will have the ability to add the **6** action code to any treatment or item in order to split the bill on that specific entry for all the clients which are using the split billing feature.
- A new action code for the Hoof Chart has been added and it is the **8** action code. When associating this code with a treatment or inventory item and adding the service or item into medical history it will attach the Hoof Chart to that entry.
- Associate the **5** action code to a treatment or item and when the service is entered in Medical History AVImark will link a Dental Chart to that entry. You must have the patients species set to Equine for AVImark to display an Equine Dental Chart.

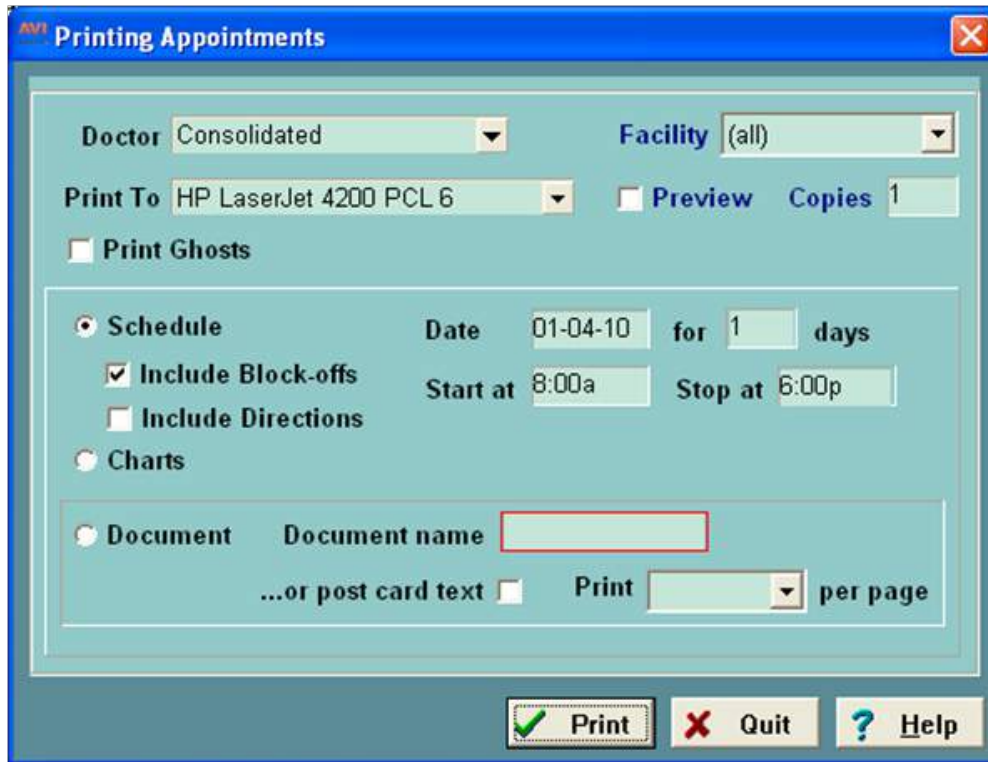
Appointment Calendar

Printing the Schedule

- With the Hospital Advanced option **Proximity Searching** set to **True** you can schedule appointments

in the same area at the same time.

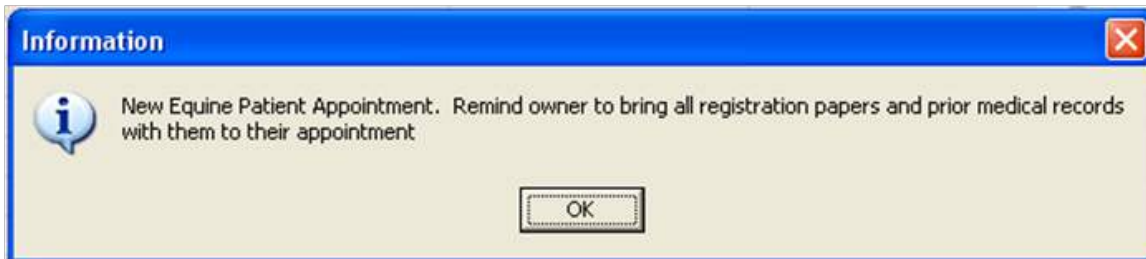
- When you print out the appointments for a given time frame, it will include the driving directions as well as a map using MapQuest.
- In order to print your directions for your appointments you have to select the option **Include Directions** in the Printing Appointments window. The schedule will have the written directions and the second page will include a map. These Maps can be printed for all species.
- For pets with Client/Patient Relations the directions printed will be based on where the pet resides.



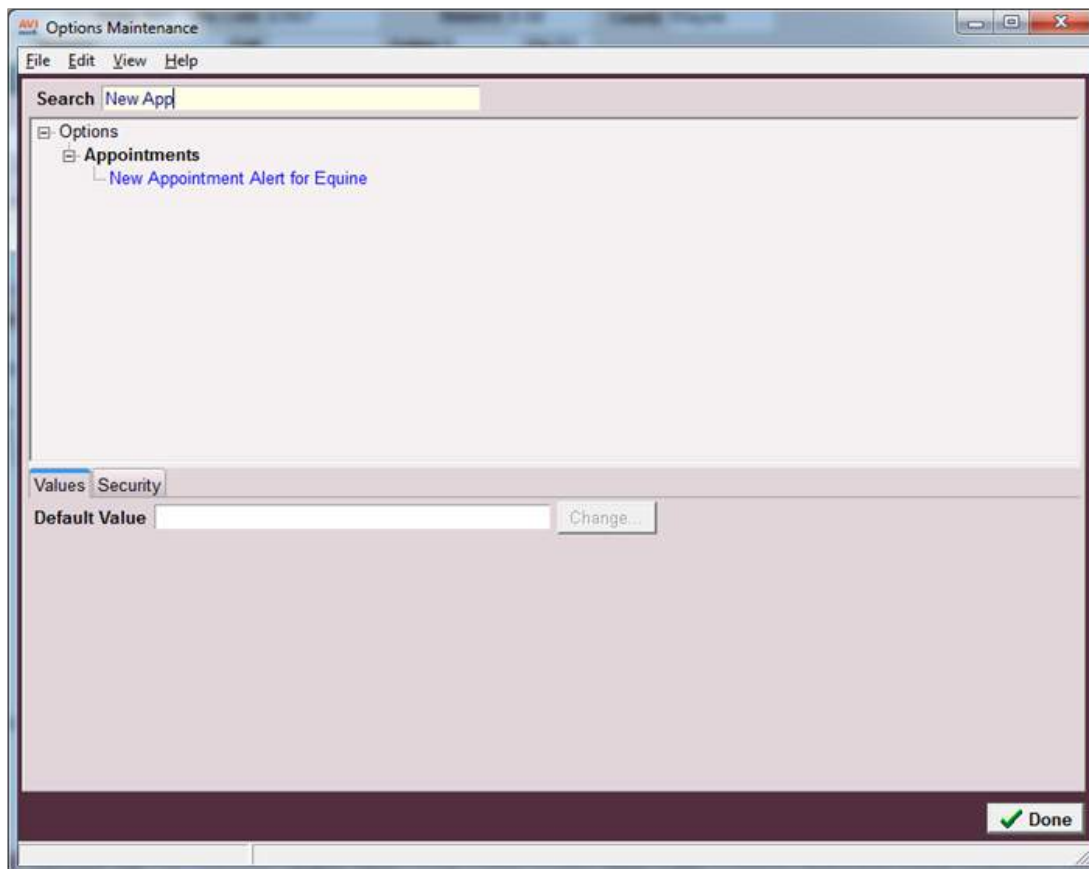
Time	Room	Dr.	Client Name	Phone No.	Patient	Species	Treatments	Confirmed
Date: Thr, April 7, 2011 Doctor: Consolidated <div style="text-align: right;">Equine Technical Support APPOINTMENT SCHEDULE</div> <div style="text-align: right;">Page: 1 Printed: 04-07-11</div>								
10:30a	20 min.		Block-off		Call Back Time			
1:10p	10 min.	RM1	DNS 10 Dugan, Laura	(573) 555-0253	Bashful	EQUINE		
Directions:								
Depart Start								
Arrive End								
2:30p	10 min.		Block-off		Rounds			
2:40p	20 min.		Block-off		Call Back			
3:10p	10 min.	RM1	DNS 10 Dugan, Laura	(573) 555-0253	Bashful	EQUINE		
Directions:								
Depart Start								
Arrive End								

New Patient Appointment Prompt

- When creating a new patient appointment you will now receive an alert in AVImarkEQ that states “**New Equine Patient. Remind owner to bring all registration and prior medical information with them to their appointment**”.



- The prompt New Appointment Alert for Equine can be defined in Hospital Advanced Options.
 - This prompt will only appear when the patient species is Equine or Horse.
 - When defining this prompt in Advanced Options the value can be set to one of the following: **Never**, meaning the clinic will disable the feature and will not receive the message; **New Appointment** will display the message only when creating a new appointment; **New Patient**, which will display the message only when selecting the New Patient option when creating a new appointment.



Word Processing and Documents

New documents have been added into the Equine AVImark program for Equine Clinics along with new merge words. Below is a list of the new merge words that can be utilized in both AVImarkEQ and MSWord and they are used to include equine information:

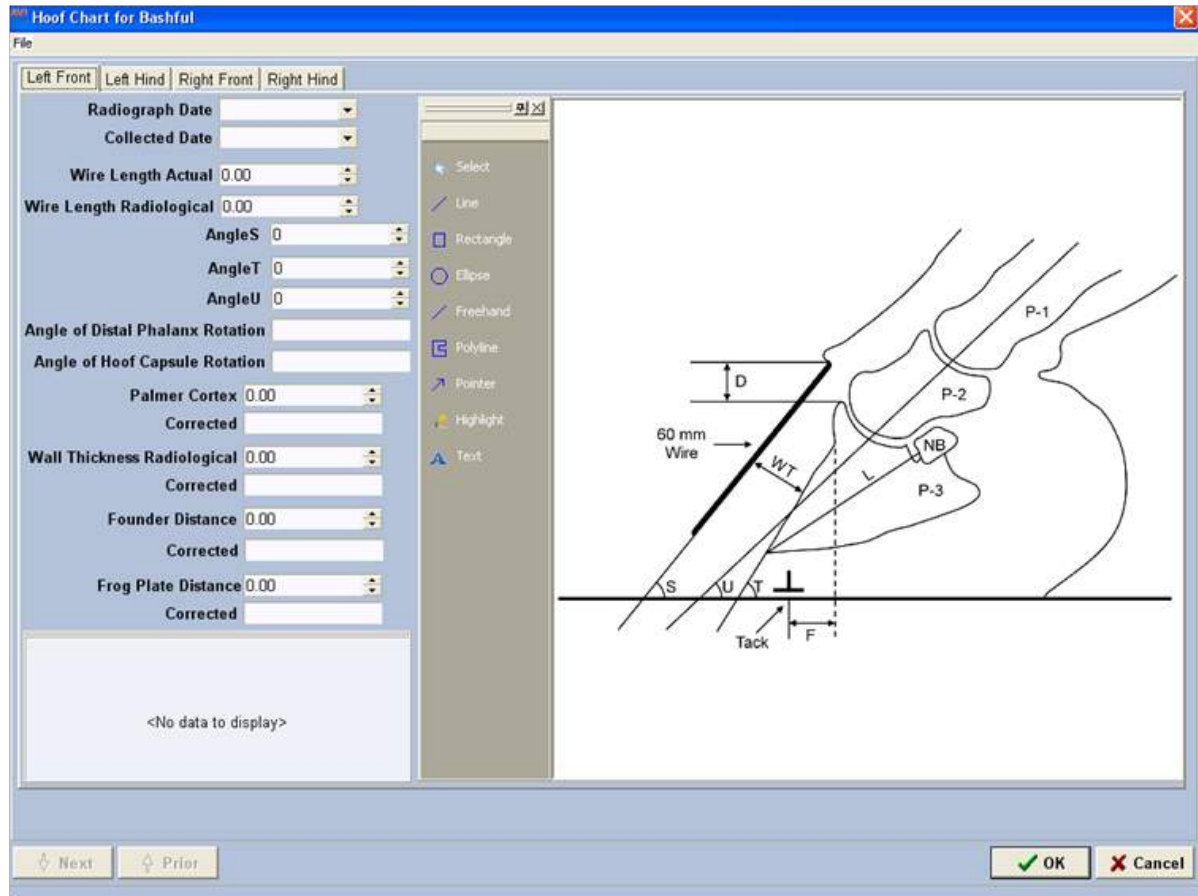
AVImark	MS WORD®	MERGE WORD	DESCRIPTION
●	●	<registration-name>	registered name of the patient
●	●	<dam-name>	dam's name
●	●	<sire-name>	sire's name
●	●	<height>	height of the patient
●	●	<locating-service>	locating service
●	●	<colorb>	body color of the patient
●	●	<colorm>	patient's mane color
●	●	<colort>	patient's tail color
●	●	<colorh>	patient's hoof color
●	●	<colore>	eye color of the patient
●	●	<colors>	patient's sclera color
●	●	<markingb>	patient's body marking
●	●	<markingh>	head marking on patient
●	●	<markinghoof>	hoof marking on patient
●	●	<markingm>	patient's mottling marking
●	●	<markingfl>	left fore leg marking on patient
●	●	<markingrfl>	right fore leg marking on patient
●	●	<markinghfl>	left hind leg marking on patient
●	●	<markingrhl>	right hind leg marking on patient

Hoof Chart

Accessing the Hoof Chart

The Hoof Chart can be accessed from the CID, in the Medical History area under the Attachments section.

- Highlight an entry and click the **Hoof Chart** Attachment option.
- The **action code 8** will allow you to have the Hoof Chart automatically opened when entering a treatment or inventory item into Medical History. This action code will be selected in the Treatment or Inventory list.



- When printing the Hoof Chart you will have the option to select which hoof(s) you would like to print on the Hoof Chart. The Hoof Chart will include the Farrier information no matter what pages you have selected to print.

Hoof Chart Tabs

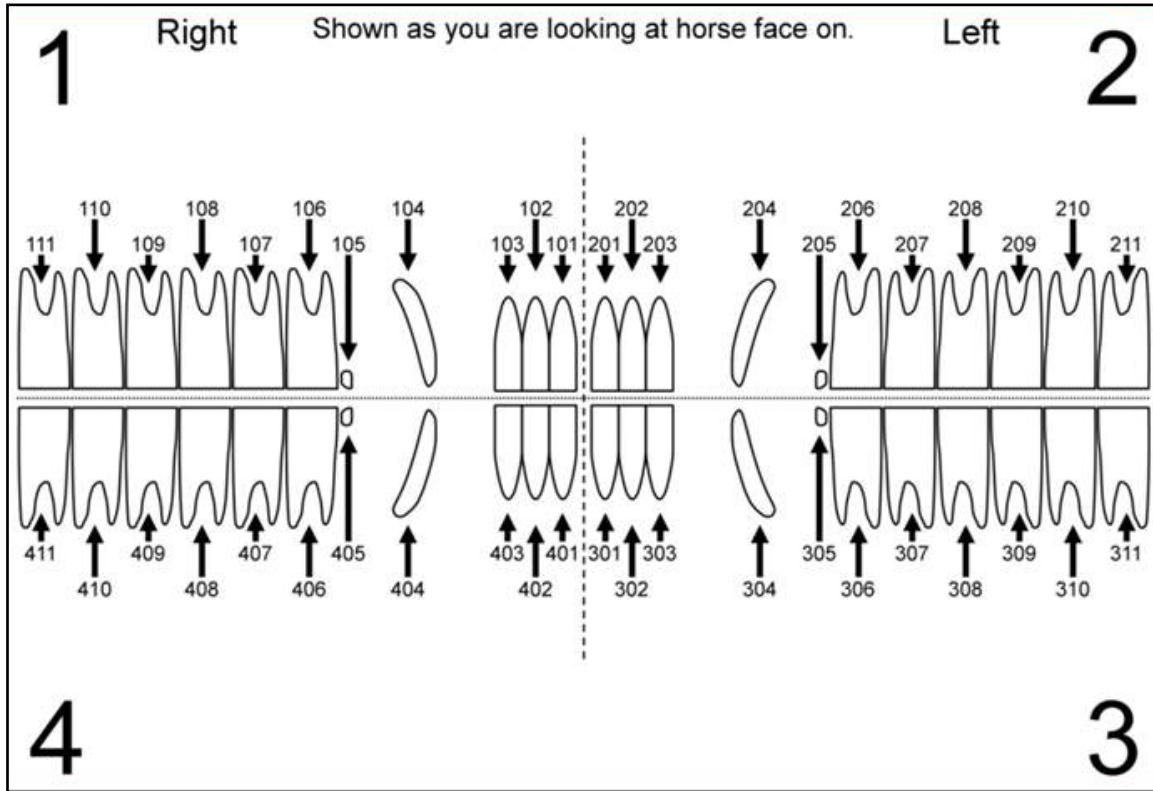
The Hoof Chart will show 4 tabs and these tabs will include information about each hoof. The 4 tabs are named **Left Front**, **Left Hind**, **Right Front** and **Right Hind**.

The information held on each tab is listed below:

- **Radiograph Date** – date radiograph taken
- **Collected Date** – date of data collected
- **Wire Length Actual**
- **Wire Length Radiological**
- **Angle S** - Dorsal Wall Angle
- **Angle T** - P-3 Angle
- **Angle U** - Phalanx Angle
- **Angle of Distal Phalanx Rotation** - Angle T minus Angle U
- **Angle of Hoof Capsule Rotation** - Angle T minus Angle S
- **(L) Palmar Cortex** - Distal Phalanx Distance
- **Corrected for Magnification**

Dental Chart

The Dental Chart has been modified for the Equine species and this image is an example of how the Equine Dental Chart will appear.



The Dental Chart abnormalities have also been replaced with the following abnormalities:

- **SP:** Sharp enamel Points
- **BI:** (L, A, or U): buccal injury (laceration, abrasion, and ulcer)
- **LI:** (L, A, or U): lingual injury (laceration, abrasion, and ulcer)
- **CH:** crown hook
- **BK:** beak
- **RP:** ramp
- **Sp:** step
- **Wa:** Wave
- **ETR:** excessive transverse ridge
- **Cup:** cup in central portion of crown
- **TC:** tall crown
- **PD:** periodontal pocket
- **Fx:** fracture
- **CAL:** calculus
- **DT/R:** deciduous root silver or fragment
- **CA:** cavity

- **SN:** supernumerary tooth
- **O:** missing tooth
- **WC:** worn crown
- **ROT:** rotated
- **X:** extraction
- **(WT) Wall thickness Radiological**
- **Corrected for Magnification**
- **(D) Founder Distance**
- **Corrected for Magnification**
- **(F) Frog Plate Placement Calculation**
- **Corrected for Magnification**

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