

# AVImark<sup>®</sup> training resources

Adapting and adjusting your  
practice workflow

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Setting up Wellness Plans allows you to provide the best standards of care and schedule out payments to allow flexibility for customers and ensure stored cards for future remote payment options.
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The Work List, Follow-up List, and Whiteboard are great ways to monitor tasks without having to communicate in person. Follow-ups are typically for notices to call customers back and worklists are for tasks to complete. These could be great tools to use if you have a remote staff member making calls or completing record reviews from home during this time. If you are using telemedicine of any kind and are getting photos or files from customers, you can use the File Attachments to keep a complete record of the information you had available for your virtual visit.
- [Notes and Note Glossary](#)  
As client communication is coming and going more via email and SMS, the Note Glossary is a great way to capture note templates to quickly reuse to save time typing.
- [Medical Condition Record – Basic](#)
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If you have reduced caseload, you could get your protocols organized to simplify your Medical Record keeping.
- [Check-in workflow options](#)  
This section of the document goes over settings you can customize to fit your practice's flow when checking the patient in for their visit. It is supplemental to the Whiteboard and Medical Condition Records sections.



# **Mass communication using email**

# Mass communication using email

Please follow the instructions below.

1. Highlight ALL of the code editor text in red below.

```
search [Client] code 'MASSEML' name 'All Active Client Emails'  
category 'Clients'  
notes 'Active Clients with email by last visit' (  
  [Client-E--mail-Text] contains '@' and  
  [Client-Codes] does not contain 'i,x' and  
  [Client] exists in (  
    [Patient-Last Visit] is greater than '01-01-17' and  
    [Patient-Codes] does not contain 'd,m,i'  
  )  
) report (  
  [Client-Account],  
  [Client-Full Name],  
  [Client-E--mail-Text]  
) sort by (1 ascending)
```

2. Right click on the highlighted text and click Copy
3. Open AVImark and go to **Work With | Information Search**
4. Cancel the search window and it will open a new search
5. In the search window click **View** at the top of the window and click **Code Editor**
6. Remove all the text that appears in the Code Editor window
7. Then right click and select **Paste** to paste the Red text you highlighted above into the Code Editor window.
8. Click **OK**. You'll get a message asking if you want to add this search, click **Yes**.
9. Click **Search** in the lower left corner to run the search. It will automatically change to the Search Results tab. It will show a number of rows in the bottom left. This is the number of emails that will be sent when you follow the steps below.
10. Click **Results** at the top of the search window and click **E-mail**
11. Click the check box next to Message Text. This is where you will enter the text you want to show in the body of the E-mail. Then click **Done** to close the note window.

# Mass communication using email

12. Check the **One Per Client** option
13. In the Attached File field you can link a document that will be attached to each email or you can leave it blank.
14. Click **Send**



Most email providers have a limit to the number of emails that can be sent per day or per hour. Please check with your provider before sending to ensure all of the emails will be sent out correctly.

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Before printing or emailing from any information search (aka query), please select a sample group from the search results and verify the desired clientele has been reached. If you need help with this, contact [AVImark support](#).

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***\*Important note:*** Neither AVImark or Covetrus is responsible for any text or image content in the emails you create and deploy. Please be sure to proofread carefully before sending your custom messages, as they can not be canceled once they are in queue.

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# **How to: Remote access**

# How to: Remote access

## Accessing your software from outside your clinic is possible.

To do this, you will need to select a remote access software solution and install it on both the workstation or server you wish to access and the computer you will be using to connect in.

While there are many options for remote software, with some offering free trials, here are a few to consider:

- <https://www.logmein.com/try-access>  
LogMeIn has recently announced free Emergency Remote Work Kits for Healthcare Providers. Check their website for eligibility requirements.
- [https://www.gotomypc.com/members/register.tmp?Location=en\\_US&FreeTrial=true](https://www.gotomypc.com/members/register.tmp?Location=en_US&FreeTrial=true)

Additionally, our support staff would be happy to help you with any questions or issues you have when setting up your remote access. Here are a few things to keep in mind when selecting a provider or using it:

- **Always select the Professional Version.** Yes, it may be slightly more expensive but the professional version for this type of software is more appropriate for your business.
- To be able to access the software remotely, **you must leave the workstation/server on.** Make sure you reboot the workstation/server and test your access prior to leaving the practice. This will ensure that any updates are run and should reduce the risk of the computer rebooting while you're not there. Reminder: rebooting servers should be done when no one is utilizing the software.
- Install the software on the computer you normally use in the practice. This ensures you will have the same experience and rights as you would normally have.
- With any remote access software you are opening access to your practice network. This can increase the risk of virus/malware. You should read the security notes from your provider and ensure that you have an up-to-date antivirus solution on your clinic network and the computer you will use to access your systems.

Contact your local IT professional or our qualified support team with any questions. Covetrus is not affiliated with any remote access providers. Make sure you read all terms and conditions of any products you purchase or trial.



# Wellness Plans



# Wellness Plans

## Wellness Plan basic setup

To create a Wellness Plan first create a treatment in the Treatment list as you normally would. To add plan entries or edit information on the plan use the following steps:

- Open the Change Treatment window on the Wellness Plan you created and select the **Plan Entries** tab.

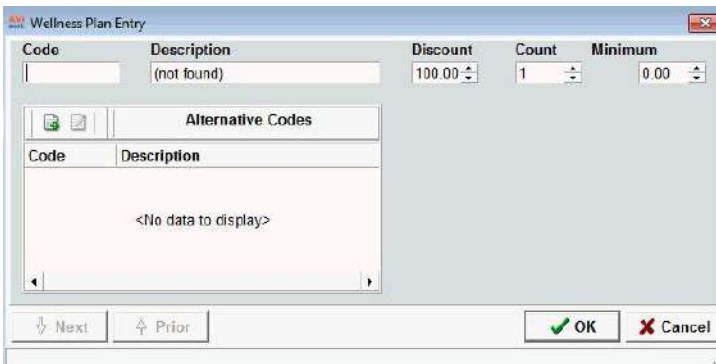


The screenshot shows a software window titled "Change - Silver Patient Plan". It has a tabbed interface with several tabs: "Treatment", "Advanced", "Contract Prices", "Documents", "Whiteboard", "Laboratory", "Associated Entries", "Plan Entries" (which is selected and highlighted in green), and "Re...". Below the tabs, there are three main fields: "Code" with the value "SILVER", "Description" with the value "Silver Patient Plan", and "Charge" with the value "300.00".



For the plans that were transferred from System Tables the included services and detailed plan information will appear in this window.

- **Right-click | New** to add included services for the plan or **right-click | Choose** to select from the Treatment or Inventory list.



The screenshot shows a "Wellness Plan Entry" window. At the top, there are four input fields: "Code" (empty), "Description" (containing "(not found)"), "Discount" (containing "100.00"), and "Minimum" (containing "0.00"). Below these is a section titled "Alternative Codes" which contains a table with two columns: "Code" and "Description". The table is currently empty, displaying "<No data to display>". At the bottom of the window, there are four buttons: "Next", "Prior", "OK", and "Cancel".

- Enter a **Code** or **Description** to add a service.
- **Discount** is used to determine the percentage of discount this particular service is to receive. This will default to 100%.
- In the **Count** field specify the number of times this service is to be performed and covered by the plan.
- Define a **Min Qty** to Perform to ensure the service is administered the desired number of times.
- Click **OK** on the Change Plan Entry window once the desired information is entered.

# Wellness Plans

## Selling a Wellness Plan

Place the Wellness Plan in the patient's Medical History and the plan name and expiration date will be automatically viewable from the patient area.

**PATIENT: Karma**

Name	Karma	Codes		Sex	S
Birthday	04-28-12	Age	4y	Rabies	
Breed	Boxer	Plan	CANWP 06-28-17		
Color	(unspecified)	Weight	0.00	in	lbs
Species	Canine	Allergy	(none)		

Once the Wellness Plan is within 30 days of expiring the description in the Plan field will appear in blue.

Also in version 18.20 and higher it will display a heart icon in 3 colors beside the patient name as well as on the patient tab below medical history.

**PATIENT: Bonnie**

Name	Bonnie	Codes		Sex	F	Added	03-21-03	406	Canine Rabies Vaccination	12-02-13
Birthday	04-07-09	Age	9y	Rabies	62536	Reminded	07-09-07	4707	Sentinel FlvTab Brown <10#	12-11-13
Breed	Poodle, Toy	Plan	CANW 12-19-18			Deceased	(none)	202	Annual Physical Examination	08-26-14
Color	Chocolate	Weight	8.94	in	lbs	Microchip		401	Canine Bordetella Vaccination	08-26-14
Species	Canine	Allergy	(none)			Relation	(none)	406	Canine DA2PP Vaccination	03-12-15

Reminders / Follow-ups / Estimate / Ownership / Schedule

Date	Time	Dr.	Type	Code	Description	Qty	Amount	By	Photo	Public?
12-19-17	9:29a	DNS	T	CANW	Canine Adult Wellness	1	400.00			Yes
11-11-13	2:30p	DNS	I (n)	4707	Sentinel FlvTab Brown <10 lbs Give one tablet by mouth once monthly (every 30 days) for prevention of parasites.	1	11.92			Yes
08-28-13	12:40p	DNS	I (n)	4707	Sentinel FlvTab Brown <10 lbs Give one tablet by mouth once monthly (every 30 days) for prevention of parasites.	1	11.92	MAW		Yes
08-28-13	12:40p	DNS	T	401	Canine Bordetella Vaccination	1	12.48	MAW		Yes
08-26-13	12:40p	DNS	T	202	Annual Physical Examination	1	40.00	MAW		Yes
03-12-12	9:13a	DNS	T	202	Annual Physical Examination	1	40.00			Yes
03-12-12	9:13a	DNS	T	401	Canine Bordetella Vaccination	1	12.48			Yes
03-12-12	9:13a	DNS	I (n)	4707	Sentinel FlvTab Brown <10 lbs Give one tablet by mouth once monthly (every 30 days) for prevention of parasites.	1	11.92			Yes
03-12-12	9:13a	DNS	T (n)	406	Canine DA2PP Vaccination	1	16.50			Yes

Chronological / Diagnoses / Diet / Injections / Lab / Rx / Reminder / Surgen / Vaccs / X-Ray / SOAP / Photos / Notes / Public / Problems / Attachments / Dental / Requisitions / Radiographs / Plan

Attachments:  Dental Chart,  Form,  Inventory Used,  Medical Condition,  More Stuff,  Notes,  Photograph,  Attachments,  Alert,  Vaccination,  Tests,  Radiographs,  Hoof Chart,  GVL Coonins

- Green = active Wellness Plan
- Yellow = expiring in 30 days or less
- Red = inactive Wellness Plan

This option is controlled by an advanced option. If you go to the advanced options menu and search "indicator" then select on display Wellness Plan indicators and set that option to True. Also while you are in the advanced option you can change how long the red indicator will display after the plan expires with the "expire wellness pan indicators for # days" option.

# Wellness Plans

This indicator will also show on the whiteboard.

Client	Patient	Breed	Unposted	In Date	In Time	Waiting	Out Date	Status
Dial, Catherine	Bonnie	Poodle, Toy		10-01-18	4:34p	0:00	10-13-18	Hospitalized
10-01-18 at 9:00a: Spay & Nail Trim								
10-01-18 at 9:43a: Sx Complete								
10-01-18 at 1:59p: Awake & Alert								

In medical history there has also been a plans tab added to view plans that have been sold, as well as the services that have been provided from a Wellness Plan.

Date	Time	Dr.	Type	Code	Description	Qty	Amount	By	Photo	Public?
12-19-17	9:29a	DNS	T	CANW	Canine Adult Wellness	1	400.00			Yes

## Advanced Wellness Plan setup

### Adding Alternate Codes

Alternate Codes can be linked to a current Wellness Plan entries. This is beneficial when the current service is no longer appropriate to administer once the pet reaches a certain age or weight during the plan term.

Code	Description	Discount	Count	Minimum
933	Antech (SA070) Mini Screen & CBI	100.00	1	0.00

Code	Description
926	Antech (SA020) SuperChem & CBC
931	Antech (SA030) Vet Screen & CBC
923	Antech (T330) CBC with Differential
830	Differential, Manual CBC
800	CBC Test

# Wellness Plans

- To add alternate code **right-click | New** within the Alternate Codes window to select alternate services. Alternative codes will count towards the fulfillment of the count set on the primary code.
- Click **OK** and the alternate entries will be added to the grid window in the Wellness Plan Entry window.

-OR-

**Right-click | Choose** to select from either the Treatment, Inventory, Diagnosis or Problem list.

- Select the appropriate entries by one left click on the service or item and AVImark will place them under Selected.
- Click **Done** and all entries selected will be placed in the grid window within the Wellness Plan Entry window.

## Plan Entries tab options

At the bottom of the Plan Entries window are fields that will cover the Plan details.

Code	Description	HistoryType	Count	Discount	Amount	PlanAmount
202	Annual Physical Examination	Treatment	1	100.00	40.00	0.00
815	Fecal Examination, Flotatio	Treatment	1	100.00	20.00	0.00
611	Castration, Canine	Treatment	1	100.00	95.00	0.00
436	Canine Rabies Vaccination	Treatment	1	100.00	21.95	0.00
844	Heartworm Test Snap	Treatment	1	100.00	25.00	0.00
933	Antech (SA070) Mini Scree	Treatment	1	100.00	42.50	0.00
650	Ovariohysterectomy, Canine	Treatment	1	100.00	49.59	0.00

Auto-renew    Include Tag Alongs    Calculate Plan Charge   Total Cost 1.050

First Payment 75.00   Courtesy Charge 0.000 %   Total Price 294.04

Courtesy Class employees   Courtesy Rate 0.00   Total Plan Amount 0.00

Charge Term Count 12 Monthly   Term Count 12 Months   Remove Plan

Next   Prior   OK   Cancel

- Select **Auto-Renew** to have the plan automatically renewed once the end of the term has been reached.
- Use the **Include Tag Alongs** option to apply the plan discount to any associated entries

# Wellness Plans

attached to the included services. Leaving this option unchecked will cause AVImark to charge normal pricing for tag alongs or apply the Courtesy Rate if one is defined. Note that any associated or linked entries to included services will automatically be included in the plan when the parent treatment is administered.

- **Calculate Plan Charge** - If the option is checked, AVImark will automatically open the Plan Charges window at the time the Wellness Plan is placed in the patient's Medical History. From within this window you will be able to define recurring charges.
- **First Payment** is the up front payment the client is responsible for when they purchase the plan.
- A **Courtesy Charge** can also be applied to cover fees such as processing fees and other various fees.
- You can choose a Client Discount Class in the **Courtesy Class** field which will allow the discounts associated with this client class to be applied to the patient.
- In the **Courtesy Rate** field specify what percentage discount is to be allowed on all treatments and items not covered under the plan.
- **Charge Term Count** allows you to place a default number of recurring payments.
- Define the length of the plan in the **Term Count** fields by specifying a number and selecting the length of Days, Weeks, Months or Years.
- AVImark will display the Cost, Total Price and Total Plan Amount of the plan in the bottom right hand side of the Plan Entries tab.
- Click **OK** to close the Change Treatment window after defining the appropriate information.

In version 18.20 and above you can now create new generations of Wellness Plans. This will let your current patients that are on the existing wellness keep the plan they bought but you can now change for all future clients that buy the plan.

To do this in the Plan Entries window, right click and select **New Generation**.

# Wellness Plans

Code	Description	History Type	Count	Minimum	Cost
406	Canine DA2PP Vaccination	Treatment	1	0.00	0.000
417	Lyme Disease Vaccination	Treatment		0.00	0.000
401	Canine Bordetella Vaccination	Treatment		0.00	0.000
408	Canine Rabies Vaccination	Treatment		0.00	0.000
934	Antech (T615) Heartworm, Occult	Treatment		0.00	0.000
815	Fecal Examination, Flotation	Treatment	3	0.00	0.000
4709	Sentinel FlavTab White 50-100 lbs	Inventory	12	0.00	76.056
CM40	Canine Maintenance 40 lbs	Inventory	2	0.00	54.140
727	Nail Trim	Treatment	4	0.00	0.000
701	Anal Sac Expression	Treatment	4	0.00	0.000

Health Plan Version: 2

This will unlock the details to be edited. And also update the plan version number in the bottom left corner.

## Selling Wellness Plans and defining Recurring Charges

Place the Wellness Plan in the patient's Medical History and the plan name and expiration date will be automatically viewable from the patient area.

If the Calculate Plan Charge option was selected when creating the Wellness Plan then a Wellness Plan Recurring Charges window will open. From within the Wellness Plan Recurring Charge window you can set how the client will pay for the plan.



The recurring charges were designed to work seamlessly with AVImark Payment Solutions recurring payments, but all customers can benefit from the recurring charge feature, even if not using AVImark Payment Solutions.

# Wellness Plans

Canine Wellness Plan Platinum

Total 0.00

First Payment 20.00

Remaining Balance -20.00

Term Monthly

Payments Left 11

Payment Account

Payment Amount 0.00

Next Charge 07-28-16

Courtesy Charge 0.000

Auto-Renew Plan  Allow Credit Balance

✓ Set Charge Plan    ✗ Apply Full Charge

- The **Total** field will display the total price of the Wellness Plan.
- In the **First Payment** field will carry over the amount specified in the First Payment field of the Change Treatment window; however, this price can be altered per client.
- **Payment Remaining** field will show the remaining balance owed on the Wellness Plan.
- The **Term** should automatically be selected if defined on the plan but that can also be changed here if necessary.
- If the client has a credit card number stored within AVImark Payment Solutions click on the **Payment Account**, select the credit card from the drop down list or **right-click | New** to add a credit card on the fly. AVImark Payment Solutions will then automatically charge the clients credit card the term payment amount. Leave this field blank if the client wishes to pay for the plans balance by cash or check over the plans term or if they are paying the full cost of the plan up front.
- After setting the first payment amount, term and payments left AVImark will display the weekly, monthly or yearly amount to be charged in the **Payment Amount** field. This amount can be altered by typing in the desired payment in the Payment Amount field.

# Wellness Plans

- The date for the next payment will default in the **Next Charge** field but can be altered by using the drop down.
- In the **Courtesy Charge** you can set a fee for processing or other various fees. This fee will be charged to the clients account based on the term set.
- Click **Set Charge Plan** to set up the recurring payments.
- Should the client wish to pay the full plan amount click **Apply Full Charge**.
- The full tax amount will be included in the first initial payment even if the client has setup recurring payment.

If the clinic has AVImark Payment Solutions set up and a credit card is selected in the Payment Account, then AVImark will automatically charge the clients credit card on the plan payment date defined by the set term. When this date is reached AVImark will display an entry in Accounting indicating the charge to the credit card. The charge placed in Accounting will automatically be withdrawn from their credit card. For clients who are making term payments via cash or check AVImark will display an entry in Accounting and display a balance for the client, you will have to handle the payment manually.

## Wellness Plan Discounting options

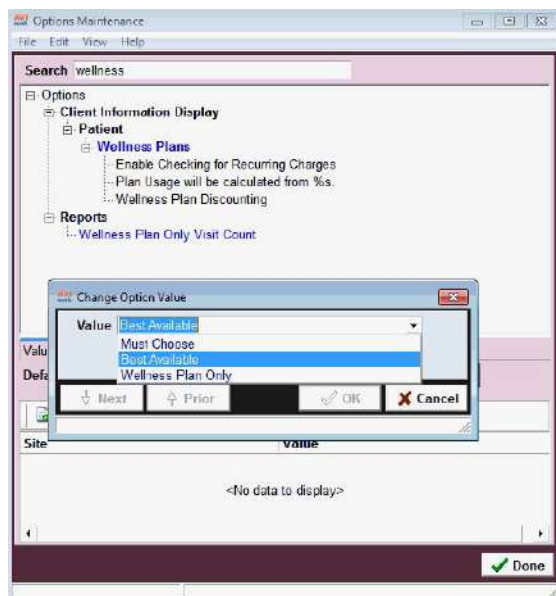
Services not included in a Wellness Plan can either be discounted or not, during the plan term. The plan discounts for non-included services are known as Courtesy Discounts and another form of discounting is the use of Client or Patient Discount Classes. Previously there was not a way to choose what discount form you wished to apply to a pet on a plan for those non-plan services but this has been greatly enhanced. You can now choose if you wish to apply the Wellness Plan Discount, maintain the Client\Patient Class discount or automatically apply the Best Available discount.

### Discount options

- Open Option Maintenance and **Search** for wellness.
- Select the option Wellness Plan Discounting and click **Change** for Default Value



# Wellness Plans



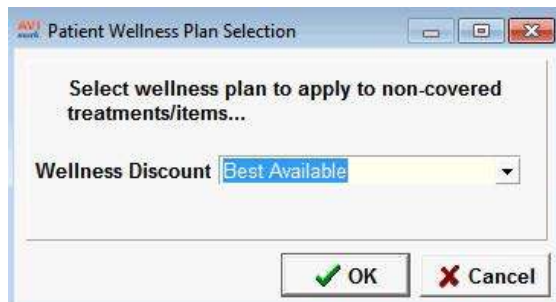
- **Must Choose** will display a discount window, after a plan is sold, allowing you to choose which discount to apply. This discount will only be active while the plan is active. AVImark will set Must Choose as the default value for this new Discounting Advanced Option.
- With **Best Available** selected all discounts are considered and applied based on the best discount available: individual Wellness Plan discounts, patient discounts and client discounts.
- The value of **Wellness Plan Only** will override existing discounts and apply the plan Courtesy Discount defined. If both Courtesy Rate and Courtesy Class are defined, AVImark will compare these two discounts and apply the Best Available discount. If a second Wellness Plan is administered, its discount will override the previous Wellness Plans. Also if the Wellness Plan discount is selected but no Courtesy Discount is defined on the plan, AVImark will not apply a discount to the non-plan services.

## Applying Discounts

After selling a plan to a patient the Discount window will appear if the Advanced Option is set to Must Choose.

- From the Patient Wellness Plan Selection window click on the **Wellness Discount** drop-down list and choose the desired discount.

# Wellness Plans



This will list the current Wellness Plan being sold along with other active plans for this patient and the option to choose Best Available. If you wish to only apply the class discount set up on this client or patient you can choose Keep Patient Class Discount, and note that a patient class discount overrides the client class discount.

Select the desired discount option. Now when a non-plan service is sold AVImark will apply the discount rate that was chosen here. Remember if from Option Maintenance you set the Wellness Plan Discount to Wellness Plan Only or Best Available, AVImark will automatically apply those discounts and not let you choose a discount option after the Plan is sold.

## Altering Recurring Payments

### Altering Recurring Payments using AVImark Payment Solutions

- Right-click in the Client area and select **Recurring Payments**
- Double-click on the recurring payment
- Modify the payments remaining, amount or date and click **OK**.



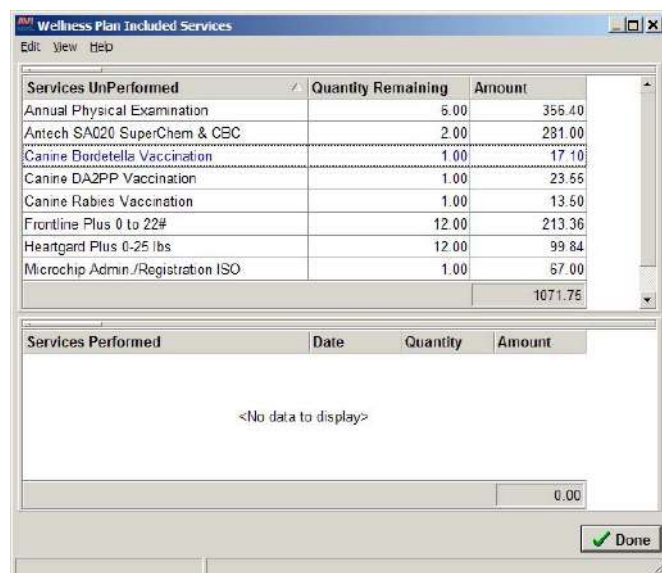
# Wellness Plans

## Altering Recurring Payments without AVImark Payment Solutions

- From the Patient area choose **right-click | Wellness Plans**
- Then select the appropriate plan and **right-click | Recurring Charge**. This will reopen the Recurring Charge window allowing you to change the **Payment Account, Payment Term** and the **Next Charge** date.

## Viewing the patient's current Plan information

Once a patient is added to a Wellness Plan it is very simple to view services that have been performed and those that are yet to be performed.



The screenshot shows a window titled "Wellness Plan Included Services" with a menu bar (Edit, View, Help). It contains two tables. The first table, "Services UnPerformed", lists various services with their quantities and amounts. The second table, "Services Performed", is currently empty, displaying "<No data to display>". A "Done" button is visible at the bottom right.

Services UnPerformed	Quantity Remaining	Amount
Annual Physical Examination	6.00	356.40
Antech SAQ20 SuperChem & CBC	2.00	281.00
Canine Bordetella Vaccination	1.00	17.10
Canine DA2PP Vaccination	1.00	23.56
Canine Rabies Vaccination	1.00	13.50
Frontline Plus 0 to 22#	12.00	213.36
Heartgard Plus 0-25 lbs	12.00	99.84
Microchip Admin./Registration ISO	1.00	67.00
		1071.75

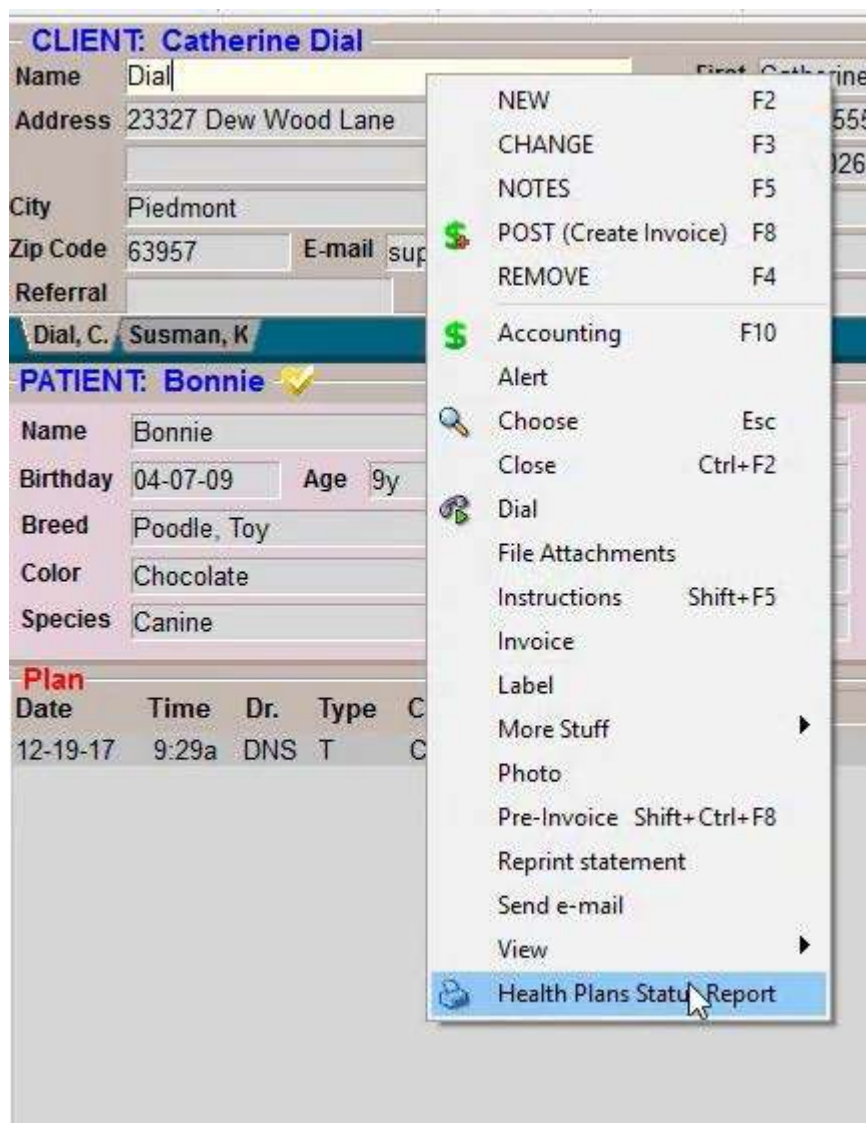
Services Performed	Date	Quantity	Amount
<No data to display>			

- From the Patient area either select the **Wellness Plans** option under Attachments or use **right-click | Wellness Plans**.
- Within the Patient Wellness Plans window all the plans the patient is currently on will be listed.
- To view detailed information about a plan, select the plan and right-click **Included Services**. AVImark will display services performed and those yet to be performed. For services that are to be performed a number of times during the plan term AVImark will display the Quantity yet to be performed.
- Under Services Unperformed **right-click | Post** to post the service to Medical History.

# Wellness Plans

- **Right-click | View Alternate Codes** to view any alternate codes associated with the service or item. This will open an Alternate Entries window, from within this window you can **right-click | Post** to post the entry into the patient's Medical History.

You can also now print a page for you client that lists the services by right clicking in the client area, then choosing "health plans status report"



# Wellness Plans

Date: 11-26-18

Loving Care Animal Hospital  
Health Plan Report

Page: 1

Client: **Dial, Catherine**  
23327 Dew Wood Lane  
Piedmont, MO 63957

Patient: **Bonnie**  
Canine Female

Plan: Canine Adult Wellness (CANW)  
Active: True  
Expires: 12-19-18  
Balance: 0.00

Services UnPerformed	Quantity Remaining	Amount
Canine DA2PP Vaccination	1.00	18.50
Lyme Disease Vaccination	1.00	18.00
Canine Bordetella Vaccination	1.00	12.48
Canine Rabies Vaccination	1.00	10.50
Antech (T615) Heartworm, Occult	1.00	32.00
Fecal Examination, Flotation	3.00	57.00
Sentinel FlayTab White 50-100 lbs	12.00	198.48
Canine Maintenance 40 lbs	2.00	71.50
Nail Trim	4.00	48.40
Anal Sac Expression	4.00	79.36

Services Performed	Date	Quantity Performed	Amount
		Total	0.00

Patient: **Little Bit**  
Canine Female

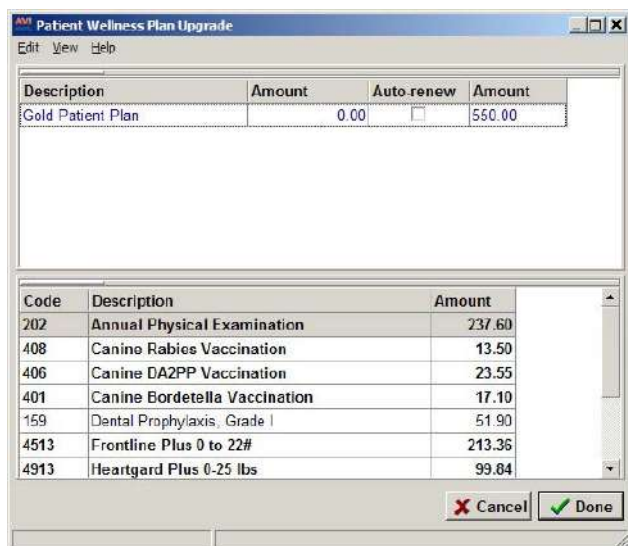
Plan: Canine Adult Wellness (CANW)  
Active: True  
Expires: 11-20-19  
Balance: 0.00

Services UnPerformed	Quantity Remaining	Amount
Canine Rabies Vaccination	1.00	10.50
Antech (T615) Heartworm, Occult	1.00	32.00
Fecal Examination, Flotation	3.00	57.00
Sentinel FlayTab White 50-100 lbs	12.00	198.48
Canine Maintenance 40 lbs	2.00	71.50
Nail Trim	4.00	48.40
Anal Sac Expression	4.00	79.36

Services Performed	Date	Quantity Performed	Amount
Canine DA2PP Vaccination	11-26-18	1.00	18.50
Lyme Disease Vaccination	11-26-18	1.00	18.00
Canine Bordetella Vaccination	11-26-18	1.00	12.48
		Total	48.98

# Wellness Plans

## Upgrading and canceling patient Plans



The new Wellness Plan feature in AVImark allows patients to upgrade their current plan to another plan.

- In the Patient area click the **Wellness Plans** option under Attachments or **right-click | Wellness Plans**.
- Left-click on the Wellness Plan that you would like to upgrade and **right-click | Upgrade Plan** AVImark will display plans that are of greater value than their current plan.
- The codes in common between the current Wellness Plan and the potential upgraded Wellness Plan will display in a bold font.
- Select the Wellness Plan to upgrade to and click **Done**.
- You will need to confirm you wish to upgrade to the selected Wellness Plan, then the Recurring Charges window will appear if the option to do so was selected on that plan.
- The **Total** will display the difference between the two plans and a First Payment can be entered if applicable.
- Choose the option **Set Charge Plan**.
- AVImark will cancel the current Wellness Plan and begin calculating from the Wellness Plan the client upgraded to.
- The current Wellness Plan name will now appear in the Plan field in the Patient area and the expiration date will stay the same.
- A code of **\$UPG\$** upgrade line will be placed in the patient's Medical History and CANNOT be removed by a **right-click | Remove** in Medical History.

# Wellness Plans

## How to cancel a Wellness Plan

- A plan can be canceled from within the Patient Wellness Plans window.
- Choose the Wellness Plan and select **right-click | Cancel Plan**.
- AVImark will calculate the usage and remove the plan from the patients plan history. If you wish to refund any portion of the plan to the customer, you can calculate the usage which will show the total of services performed and unperformed allowing you to make a decision on an appropriate amount to refund.

## Income by Plan Activity report

With the enhancement of Wellness Plans derived a new report titled Income by Plan Activity. This report will display production statistics for doctors who provide plan services and it can be printed by Doctor or Consolidated.

- Click on (menu) **Work with, Report** select the **Income by Plan Activity** report.

Category/Description	Income	Usage	Normal Price	Plan Value
<b>EXAMINATION/CONSULTATION</b>	<b>0.00*</b>	<b>1.00</b>	<b>40.00</b>	<b>20.00</b>
Annual Physical Examination	0.00	1.00	40.00	20.00
<b>PROFESSIONAL SERVICES</b>	<b>0.00*</b>	<b>1.00</b>	<b>12.10</b>	<b>0.00</b>
Nail Trim	0.00	1.00	12.10	0.00
<b>VACCINATIONS</b>	<b>0.00*</b>	<b>1.00</b>	<b>21.95</b>	<b>0.00</b>
Canine Rabies Vaccination 1 Ye	0.00	1.00	21.95	0.00
	<b>0.00**</b>	<b>3.00</b>	<b>74.05</b>	<b>20.00</b>

- **Income** indicates what the price was for each service or item included in the Wellness Plan. In many cases, this will be zero.
- **Usage** is the quantity within the time period selected that was used in conjunction with the Wellness Plan.
- **Normal Price** is the normal charge for the service or item without a discount.
- **Plan Value** is the Wellness Plan amount multiplied by the usage.

## Specifying Plan Amount on service or item

The Plan Amount allows you to assign a value to a service or item, located within a Wellness Plan, in instances where you wish this to differ from the normal value. The Plan Amount shows on the new Income by Plan Activity Report to ensure you can track the services covered by Wellness Plans doctors are providing and their appropriate value.

# Wellness Plans

## How to specify a Plan Amount

- Within the Treatment list highlight the treatment or item that you wish to set a different amount the doctor will get credit for if included in a Wellness Plan and **right-click | Change**.
- Select the Advanced tab and place the plan amount in the **Plan Amount** field.
- Click **OK** to close out of the treatment window.

## Wellness Plan Report

The original report for Health Plans has been renamed to Wellness Plan Report. A new option is also available with the report and will provide detailed information on patients that are currently on Plans.

- Click on (menu) Work with, Reports. Select the **Wellness Plan Report**.
- Under the Income Options tab check the option of Detailed Wellness Plan.
- When you print the report, the original Wellness Plan Report will print along with an additional report that gives detailed information about patients currently on Wellness Plans.
- If preview printing the Detailed Plan Report you will need to close the first report and then AVImark will display the detailed report.
- This Detailed Wellness Plan report will list owners and patients currently on plans along with plan information such as name, expiration date, services and items fulfilled and those not remaining.

## Wellness Plan Report advanced option

The number of invoices generated off only Wellness Plan visits can now be included on the Period Totals report.

- Open the Option Maintenance by clicking on the wrench speed bar icon.
- **Search** for visit and select the new option of **Wellness Plan Only Visit Count**.
- Click on **Change** next to Default Value and set it to **True**.
- AVImark will display the total number of Wellness Plan invoices and display that number as a separate line under the Total Invoices on the Period Totals Report.



**If a customer received non-plan entries during their visit, it will count as a standard invoice instead of counting as a plan-only visit.**

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# Wellness Plans

## Plan Usage prompt advanced option

If a Wellness Plan has to be back dated for one reason or another, maybe do to not having access to the software or maybe the client purchased an upgrade. AVImark will display a prompt asking for verification "Plan usage will be calculated from mm-dd-yy".

- Open the Option Maintenance by clicking on the wrench speed bar icon.
- Search for visit and select the new option of **Plan Usage will be calculated from %s**.
- Click on **Change** next to Default Value and set it to **OK**.
- AVImark will calculate the Wellness Plan usage date automatically without needing verification.

## Removing a Wellness Plan off of a Treatment

Once a treatment has been marked as a plan the only way to undo the Wellness Plan on the treatment is to open the Change Treatment window, select the Plan Entries tab and click the **Remove Plan** button at the bottom right hand side of the window. This will remove all information on the Plan Entries tab and remove the Wellness Plan from any patients that might be associated with it.



# **The path to paperless — Work List, Follow-up List, and File Attachments**

## Work List

The Work Lists is a place to define a list of jobs that your staff performs at the hospital (e.g. update medical records, feeding, blood samples, recording vital signs, boarding reservation waiting lists, etc.). Different Work List(s) would typically be assigned to appropriate staff persons to perform depending upon their abilities, etc. 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.

Work Lists have the ability to be a free floating window that can remain open along side of AVImark. This capability will allow users to continue working on the CID screen while keeping the Work List open for easy access.

The Work List can be accessed several ways:

- From the **CID | Clients Menu**
- Using a shortcut keystroke **Ctrl+Alt+F10**
- From the Patient Area, **right-click | Lists**

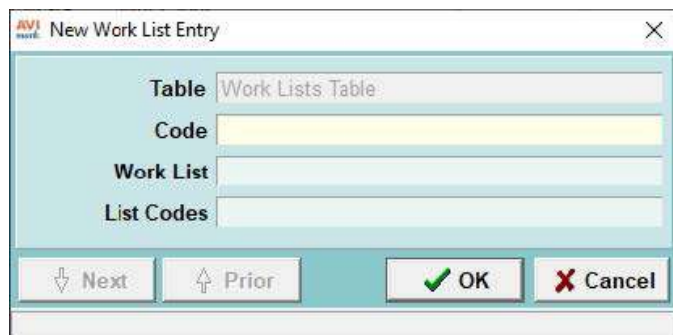
## Creating Work Lists

- The Table Code must be **"LISTS"**.

AVImark lets you define a "Work List" of jobs that your staff performs at the hospital (e.g. update medical records, feeding, blood samples, recording vital signs, etc.). Different Work List(s) would typically be assigned to appropriate staff persons to perform depending upon their abilities, etc. 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.

- From the CID, choose **Work with | System Tables**.
- Click on the **Work Lists Table** line of the System Tables window.
- To add an entry, move the mouse pointer into the Entries for Work Lists Table window, then **right-click | New** to open the New Work List window.

# The path to paperless — Work List, Follow-up List, and File Attachments



- Specify a Table Entry Code (up to 8 characters), press **Tab** and enter a description for the activity.

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 assumption here is that, for any given service, one or more “jobs” might need to be done related to either the performance of the work, after-care activity, waste disposal, clean-up, etc.

- Press **Tab** and enter a codes value that would serve to be entered on treatments or diagnoses so patients may be added to these lists automatically when these are entered into Medical History.

## Adding patients to a Work List

### Manual List assignment

You may manually assign a patient to any number of Work Lists so that a staff person may view or print a list of patients on the Work List(s) that is their job to perform. To put a patient on a Work List, do this:

- From the correct Patient Area, **right-click | Lists**, then click the specific Work List name you wish to put the patient on.
- The Work List window will open showing any patients that are currently on the list.
- From the list, choose **right-click | New**. The patient will be included on the list along with other patients already there.

## The path to paperless — Work List, Follow-up List, and File Attachments

AVI  
Change Work List

Work List **Messages**

Client 1 Dial, Catherine

Patient Bonnie

Added By Jessica Krueger

Added On 06-21-19

Accepted By

Accepted On 12:00a

Status New

JAK: 06-21-19 at 1:38p:  
Mrs. Dial would like to talk to Dr. Smith about Bonnie. She said that Bonnie's eyes are very red and wants to know if she can use some eye drops from the drug store.

Next Prior OK Cancel

- ◆ **Work List** - Name of the Work List that the entry will be added to.
- ◆ **Client** - Client the Work List entry will be added to.
- ◆ **Patient** - Patient the Work List entry will be added to.
- ◆ **Added By** - User logged in at the time the Work List entry was added.
- ◆ **Added On** - Date Work List entry was added.
- ◆ **Accepted By** - When accepted, the user logged in will display here.
- ◆ **Accepted On** - Date the Work List was accepted.
- ◆ **Status** - Status of the Work List entry.
- ◆ **Notes** - Notes entered about the Work List entry.

# The path to paperless — Work List, Follow-up List, and File Attachments

## Treatment/Diagnosis - Linked Work List assignment

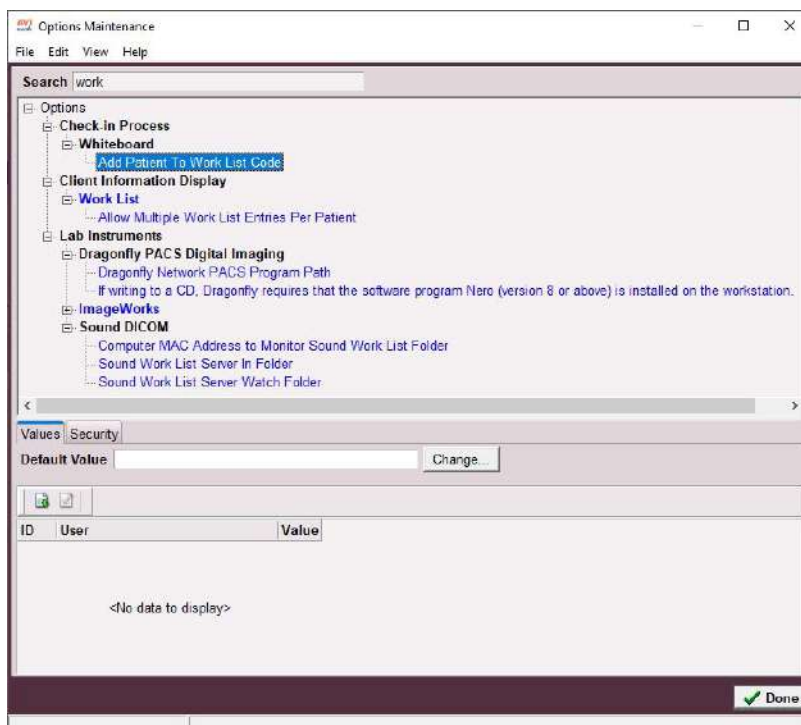
Assigning a patient to a Work List let you assign up to three Work List Codes to any treatment so that, when you perform the treatment, the patient is automatically put on one or more Work Lists. The assumption being that, for any given service, one or more “jobs” might need to be done related to the performance of the work.

For instance, entering a Euthanasia might be set up to put the patient on a Sympathy Card list. In this case, the patient would be automatically put on this Work List when the Euthanasia is entered in the patient’s medical history.

## Work List assignment upon check-in

Using the new Advanced Option “Add Patient to Work List Code” patients can now be automatically added to the list when checked-in. By default this advanced options will be left blank to allow setup by hospitals that prefer to automatically add patients to a certain list upon check-in.

- Open the Advanced Options window (using hammer, wrench, screwdriver icon on the CID) then type **work** in the search field
- Select the advanced option **Add Patient to Work List Code**
- Click **Change** to enter the code being used from the Work List Table
- Upon Check-in the patient will automatically be added to this Work List.



# The path to paperless — Work List, Follow-up List, and File Attachments

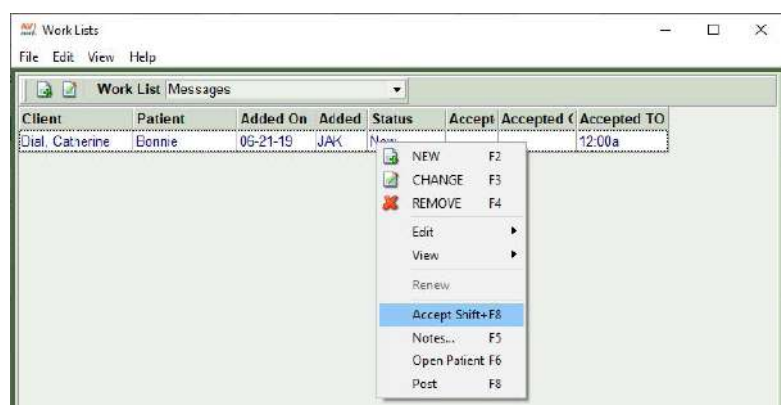
## Utilizing the Work List

Normally, from time to time through the day, each of your staff who may have jobs assigned would:

- Go to any Patient Area and choose **right-click | Lists**. A sub-menu will appear with a list of the Work Lists you have already set up in **Work with | System Tables | Work Lists Table**.
- Click the list you wish to display and/or add this patient to. The Work List window will open displaying the patients that have so far been put on the list.

### Accepting a patient from the Work List

- Select the patient on the Work List that you intend to perform the job on.
- **Right-click | Accept** to “accept” the job related to this patient.



- This will change the status of the patient from “New” to “In Progress”.

Client	Patient	Added On	Added	Status	Accept	Accepted (	Accepted TO
Dial, Catherine	Bonnie	06-21-19	JAK	In Progress	AK	06-21-19	1:40p

### Renewing a patient on the Work List

Once a patient has been accepted or removed from a Work List, the patient may be “renewed” (i.e. added back to the list).

*If the patient has been accepted*

- Click the patient you wish to “renew” (add back to the list).
- **Right-click | Renew** and the patient’s status will be changed to New.

# The path to paperless — Work List, Follow-up List, and File Attachments

## If the patient has been removed

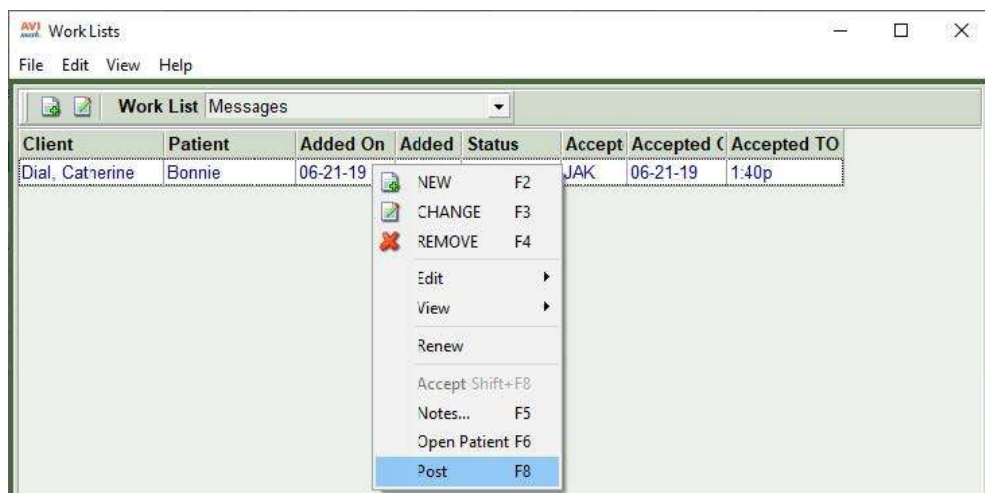
- Click menu option **Work List | Show Ghosts** option. This will display a list of patients that have been deleted or removed from this list.
- Select the patient you wish to “renew” to this list and **right-click | Renew**.

## Changing patient information on a Work List

- Simply **double-click (F3)** on the Work List entry to change the information contained within the window.
- Use the Notes area to enter special instructions pertaining to the Work List entry.

## Posting Work List notes

- When highlighting a Work List entry you can use **F8** or **right-click | Post** to post the selected line item into Medical History IF there are notes entered on the entry.



- You can also select multiple rows and post all selections at the same time. The medical history entry that gets added into history will have a code of WLIST\$, and the notes from the Work List will be attached. The description will match what is setup in System Tables for the Work List code.

Medical History										
Date	Time	Dr.	Type	Code	Description	Qty	Amount	By	Photo	Public?
06-21-19	1:46p	JAK	N (n)	WLIST\$	By: JAK, Messages JAK: 06-21-19 at 1:38p: Mrs. Dial would like to talk to Dr. Smith about Bonnie. She said that Bonnie's eyes are very red and wants to know if she can	1	0.00			Yes



# The path to paperless — Work List, Follow-up List, and File Attachments

## Going to the selected patient on the CID

- Select the patient to be displayed on the CID.
- Right-click | Open Patient or use the F6 key

## Transferring a patient to another List

- From the Work List, click on the patient you wish to transfer.
- Use right-click | Change.
- In the Change Work Lists window choose the Work List the patient should be transferred to by selecting from the drop-down list.

## Viewing ghosts

Once posted, the Work List entry will become a ghost. To view past Work List entries that have been posted select the **View | View Ghosts**. This will display past posted entries in grey.



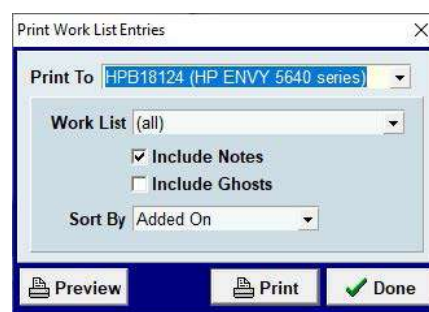
Client	Patient	Added On	Added	Status	Accept	Accepted C	Accepted TO
Dial, Catherine	Bonnie	06-21-19	JAK	In Progress	JAK	06-21-19	1:40p

## Selecting different Lists

A shortcut keystroke is available for switching between different lists once the Work Lists window is open is using Shift+Tab or hitting Tab twice to focus on the “Work List” field. Once the highlighted area is focused in this field a different list can be opened by starting to type the name of the Work List you want to open, then selecting it by hitting enter.

## Printing the Work List

- Choose File | Print to print the Work List.



## 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 followups appear in black.

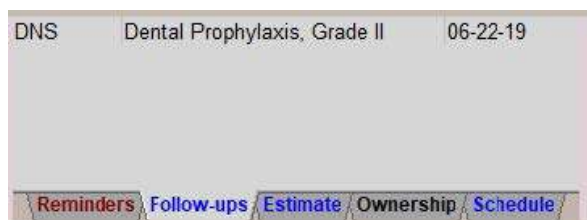


Full Name	Name	Full Phone	Due	Subject	DoctorID
Critical List					
Susman, Kathy	Jake	(573) 555-0059	06-21-19	Laparotomy	MW
Non-Critical List					
Price, Elizabeth	Maggie	(573) 555-0123	04-10-12	Lab Results	DNS
Dial, Catherine	Little Bit	(573) 555-0026	06-22-19	Dental Prophylaxis, Grade II	DNS
Dial, Catherine	Bonnie	(573) 555-0026	06-25-19	Schedule Suture Removal	DNS

## Creating Follow-Ups

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.



DNS	Dental Prophylaxis, Grade II	06-22-19
-----	------------------------------	----------

Reminders Follow-ups Estimate Ownership Schedule

- 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

## The path to paperless — Work List, Follow-up List, and File Attachments

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 **OK**.

AVI mark Change Follow-up

Subject: Dental Prophylaxis, Grade II

Doctor: DNS: David N. Sharp, DVM  Critical

Due Date: 06-22-19 or in 1 days

Not Confirmed

Call to see if they are ready to schedule dental.

Next Prior OK Cancel

Modified

### 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 | Change** to display the Change window.
- From the Treatment Change window click on the Treatment Tab. In the Inventory Change

# The path to paperless — Work List, Follow-up List, and File Attachments

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 | Follow-up List** to display the Follow-up List.



Full Name	Name	Due	Full Phone	Subject	Doctor
<b>Critical</b>					
- Critical List					
Krueger, Jessica	Flash	07-26-19	(573) 223-2062	ACL Repair	DNS
Susman, Kathy	Jake	06-21-19	(573) 555-0059	Laparotomy	MW
- Non-Critical List					
Krueger, Jessica	Cybil	07-19-19	(573) 223-2062	Carine Dental Prophylaxis	DNS
Dial, Catherine	Bonnie	07-25-19	(573) 555-0026	Schedule Suture Removal	DNS
Price, Elizabeth	Maggie	08-01-19	(573) 555-0123	Lab Results	DNS
Dial, Catherine	Little Bit	08-05-19	(573) 555-0026	Dental Prophylaxis, Grade II	DNS

Call to see if they are ready to schedule dental.

# The path to paperless — Work List, Follow-up List, and File Attachments

## Change a Follow-up callback

- With the correct Follow-up selected, **right-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**.

AVI Change Follow-up

Subject Canine Dental Prophylaxis

Doctor DNS: David N. Sharp, DVM  Critical

Due Date 07-19-19 or in -6 days

Left Message

JAK: 07-25-19 at 11:12a: Calling to see if Mrs. Krueger was ready to schedule a dental for Cybil. No answer so left message.

Next Prior OK Cancel

## Remove a Follow-up

You may remove a Follow-up once it has been made.

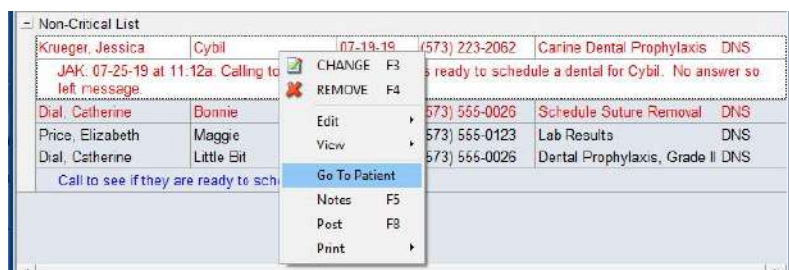
- From the Follow-up List, select the correct Follow-up.
- **Right-click | Remove**.

## 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 | Go to Patient** to display the CID for that patient.

# The path to paperless — Work List, Follow-up List, and File Attachments



## Enter Follow-up notes

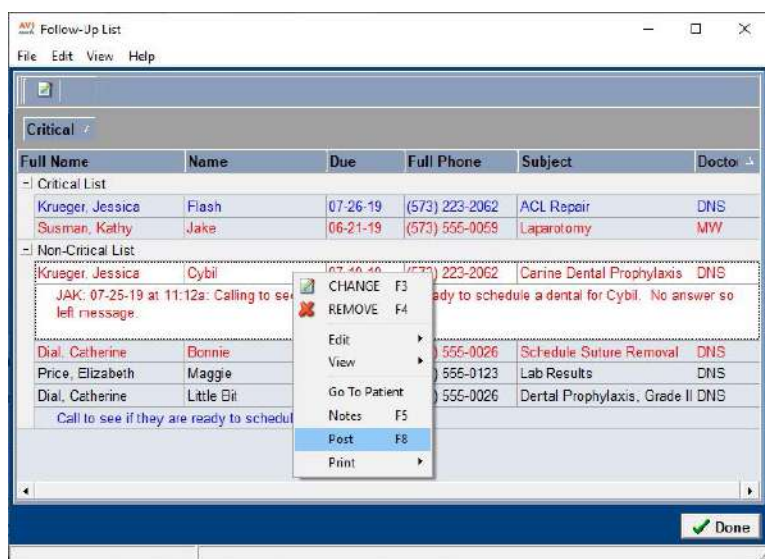
You may enter notes regarding a specific Follow-up entry using all of the available AVImark note feature options. When the Follow-up is posted the notes will be posted to the patient's medical history.

- With the correct entry selected, **right-click | 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.

## Posting a Follow-up

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 | Post**.



# The path to paperless — Work List, Follow-up List, and File Attachments

- The Follow-up will automatically be removed from the list and a line item will be entered in the patient's medical history that includes the Follow-up notes.

07-25-19	11:20a	DNS	N (n)	FNOTES	By: JAK, Canine Dental Prophylaxis	1	0.00		Yes
					JAK: 07-25-19 at 11:12a: Calling to see if Mrs. Krueger was ready to schedule a dental for Cybil. No answer so left message.				
					JAK: 07-25-19 at 11:18a: Mrs. Krueger returned call and schedule dental for 09/02/19.				
07-19-19	2:18p	DNS	T (t)	436	Canine Rabies 1 Year #62566	1	15.80	AK	Yes

## Print the Follow-up List

You may wish to print either the list itself or print documents to the clients on the 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 on screen, select Preview and click Print.

Date: 07-25-19		Loving Care Animal Hospital Non-Critical Follow-up List				Page: 1
Client	Name	Phone	Patient	Due	Doctor	Subject
1	Dial, Catherine	(573) 555-0026	Bonnie	07-25-19	David N. Sharp, DVM	Schedule Suture Removal
6	Price, Elizabeth	(573) 555-0123	Maqqie	08-01-19	David N. Sharp, DVM	Lab Results
1	Dial, Catherine	(573) 555-0026	Little Bit	08-05-19	David N. Sharp, DVM	Dental Prophylaxis, Grade II
Call to see if they are ready to schedule dental.						

## File Attachments

AVImark has the ability to have any file type attached to the client or patient area or even a medical history entry. The steps below will cover the basic setup followed by the steps to attach a file to AVImark.

### File Attachment setup

File Attachments must be moved or copied automatically from their original location to a central, shared path on the server for them to work correctly.

- Go to **Advanced Options** and **Search** for File Attachments.



- ❖ **Directory** – Enter the path of the File Attachments in the Default Value field. The File Attachments folder can be in the AVImark folder or on the root level or the server's hard drive (if on the drive instead of in the AVImark folder, make sure to share out the attachments folder).
- ❖ **Directory Organization** – Specify how to organize the saved File Attachments in the Default Value field, By Client or By Client, then Patient. The folders that will be created for each client account number and patient will be created within the path specified within the Directory listed above.
- ❖ **Transfer Type** – When attaching a file, you can select to completely move that file to the above Directory or simply create a copy of the file in the Directory. In the Default Value field, specify to Move or Copy the file.



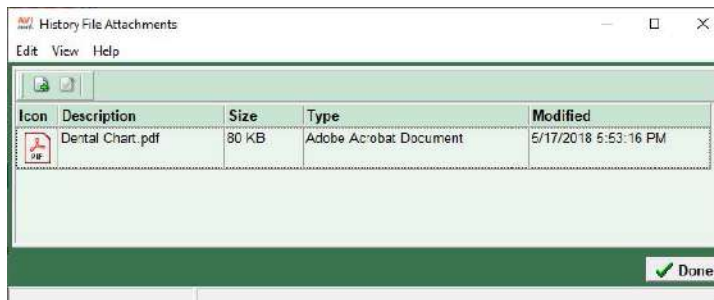
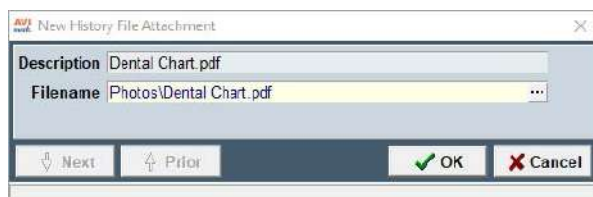
## Saving File Attachments

Saving File Attachments starts with where your scanner saves the files after scanning. This will need to be in a shared location so that attaching files can be attached in Medical History from any computer after scanning.

- Open the folder where the scans have been saved and size the window to take up half the screen. (Tip: Create a shortcut to that folder on your desktop for easy access)
- Open AVImark and position the window to take up the other half of the screen.
- **Right-click** in either the client or patient area or on a medical history entry and select **File Attachments**. This will open the History File Attachments.
- **Right-Click | New** to open the New History File Attachment window.
- Use the browse button to the right of the Filename field to search for the attachment.



- Double-click on the appropriate attachment to add it to the attachment window,
- It will also place the scanned record in the History File Attachments window and either copy or move the file to the attachments folder organized either by client or by patient.



## Viewing the File Attachments

Once an attachment has been linked in AVImark, it is very simple to view that attachment from any computer at any time.

- **Right-click** in either the client or patient area or on the medical history entry and select **File Attachments**.
- In the History File Attachment window, **right-click | Change** or double left-click on the File Attachment to open the file.

## Notes on File Attachments

- To enter specific information about the file, select the File Attachment and **right-click | Notes**.
- The Notes can be viewed in the File Attachments window by selecting **View | Show/Hide Preview**.



Icon	Description	Size	Type	Modified
	Dental Chart.pdf	80 KB	Adobe Acrobat Document	5/17/2018 5:53:16 PM

Dental images from referral practice.



# Whiteboard — Basic

# Whiteboard — Basic

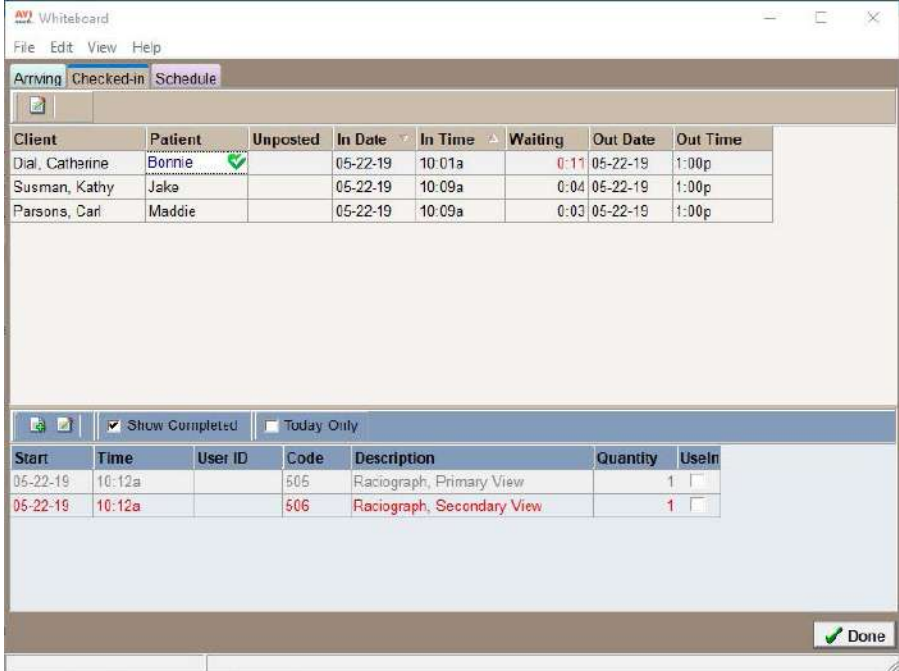
## What is the Whiteboard?

The basic function of the Whiteboard is to serve as a census list but it has other useful functions including:

- Display all patients that are checked into the hospital at any given time, regardless of their status and gives the staff an overall picture of a patient's visit from any workstation in the practice
- Communicate between the front office and the back office
- Capture charges that may otherwise be missed
- List and track non-charged services and medical administrations
- Provide to-do lists per staff member

If you currently use a physical Whiteboard in your practice, most, if not all, of the information that you currently display may also be displayed on the electronic Whiteboard in AVImark. Many clinics are replacing their dry erase Whiteboard with a large screen television on which to display AVImark's electronic Whiteboard. The electronic Whiteboard will update automatically when the auto refresh option is set to true allowing for auto refreshing of all windows in the program.

The default view of the Whiteboard is to show a list of all patients that are currently checked into the clinic, a census list. The default view will not display activities scheduled for the selected patient.



The screenshot shows the AVI Whiteboard application window. It has a menu bar (File, Edit, View, Help) and three tabs: Arriving, Checked-in, and Schedule. The 'Checked-in' tab is active, displaying a table with columns: Client, Patient, Unposted, In Date, In Time, Waiting, Out Date, and Out Time. Below this is a section with checkboxes for 'Show Completed' and 'Today Only'. At the bottom right, there is a 'Done' button with a green checkmark.

Client	Patient	Unposted	In Date	In Time	Waiting	Out Date	Out Time
Dial, Catherine	Bonnie	✓	05-22-19	10:01a	0:11	05-22-19	1:00p
Susman, Kathy	Jake		05-22-19	10:09a	0:04	05-22-19	1:00p
Parsons, Carl	Maddie		05-22-19	10:09a	0:03	05-22-19	1:00p

Start	Time	User ID	Code	Description	Quantity	UseIn
05-22-19	10:12a		505	Radiograph, Primary View	1	<input type="checkbox"/>
05-22-19	10:12a		506	Radiograph, Secondary View	1	<input type="checkbox"/>

# Whiteboard — Basic

## Whiteboard overview

### Arriving tab

Displays all patients with Appointments or Boarding Reservations for the Date(s) and Doctor selected.

#### Appointments sub-tab

See a listing of all appointments for any given date range or doctor you choose. View appointments that have already been checked-in, marked as late arrivals, rescheduled, and canceled or no show by selecting the **Show Ghosts** option.

Client	Patient	Date	Time	RoomCode	Appointment Type
Dial, Catherine	Bonnie	05-22-19	11:00a	RM1	Reservation

#### Boarding sub-tab

View a list of all current boarding reservations.

Client	Patient	In	Out	Facility	Type
Dial, Catherine	Little Bit	05-22-19	05-24-19	BRDRUN7	Reservation

# Whiteboard — Basic

## Checked-in tab

A listing of all patients currently checked into the clinic. Staff can view what each patient is scheduled to have done and what has been completed.

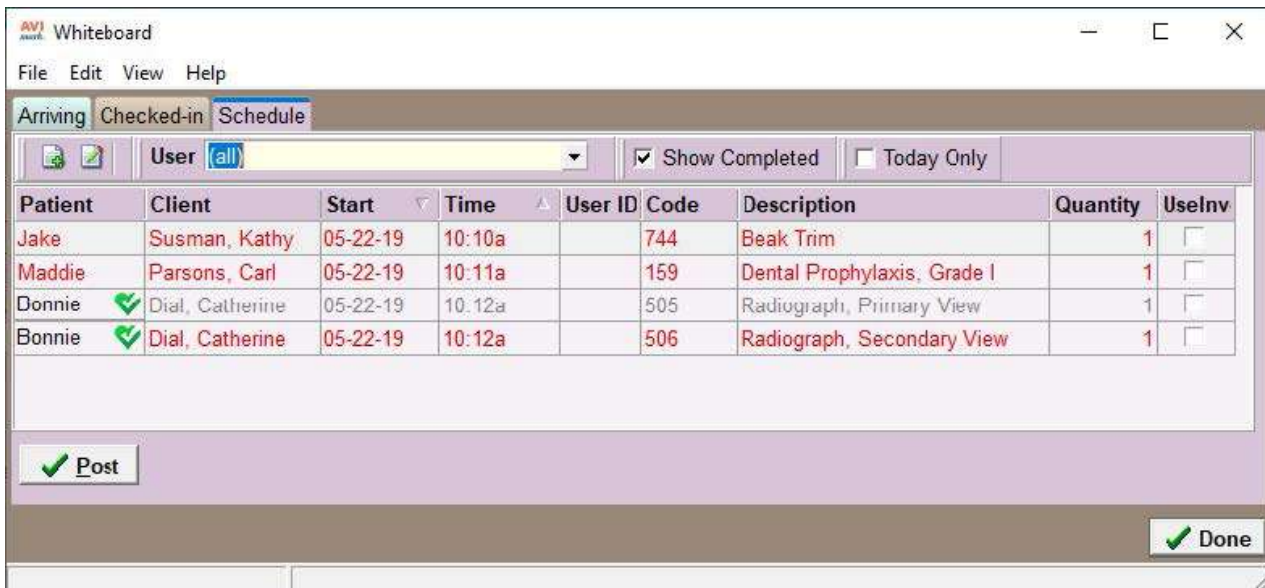


The screenshot shows the 'Checked-in' tab in the Whiteboard application. It displays a table with the following columns: Client, Patient, Unposted, In Date, In Time, Waiting, Out Date, and Out Time. The data rows are:

Client	Patient	Unposted	In Date	In Time	Waiting	Out Date	Out Time
Dial, Catherine	Bonnie	<input checked="" type="checkbox"/>	05-22-19	10:01a	0:19	05-22-19	1:00p
Susman, Kathy	Jake	<input type="checkbox"/>	05-22-19	10:09a	0:12	05-22-19	1:00p
Parsons, Carl	Maddie	<input type="checkbox"/>	05-22-19	10:09a	0:11	05-22-19	1:00p

## Schedule tab

The Schedule tab is where all activities assigned to all patients who are checked in may be viewed. One reason to assign users to activities is that it allows for quickly sorting activities in the schedule tab by the user that is responsible for performing them. Any staff member may use the **User** drop-down and choose the appropriate user.



The screenshot shows the 'Schedule' tab in the Whiteboard application. It features a 'User' drop-down menu set to 'all', a 'Show Completed' checkbox checked, and a 'Today Only' checkbox unchecked. The table below lists activities with columns: Patient, Client, Start, Time, User ID, Code, Description, Quantity, and UseInv.

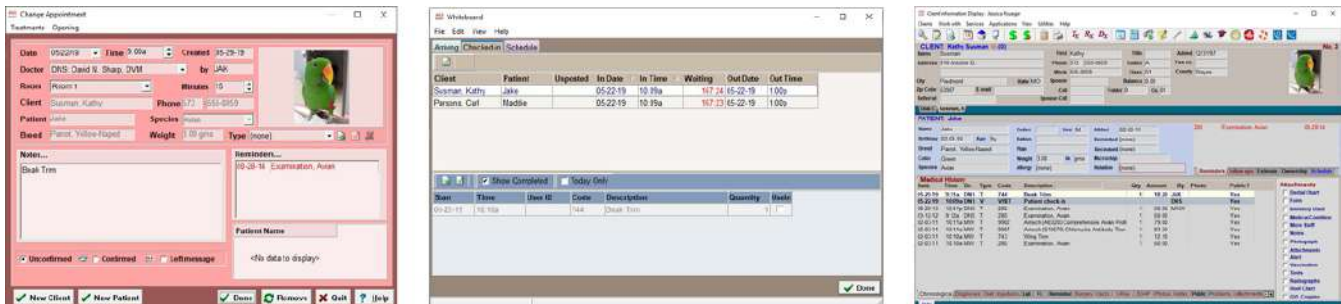
Patient	Client	Start	Time	User ID	Code	Description	Quantity	UseInv
Jake	Susman, Kathy	05-22-19	10:10a		744	Beak Trim	1	<input type="checkbox"/>
Maddie	Parsons, Carl	05-22-19	10:11a		159	Dental Prophylaxis, Grade I	1	<input type="checkbox"/>
Donnie	<input checked="" type="checkbox"/> Dial, Catherine	05-22-19	10:12a		505	Radiograph, Primary View	1	<input type="checkbox"/>
Bonnie	<input checked="" type="checkbox"/> Dial, Catherine	05-22-19	10:12a		506	Radiograph, Secondary View	1	<input type="checkbox"/>

At the bottom of the window, there is a 'Post' button with a checkmark icon and a 'Done' button with a checkmark icon.

# Whiteboard — Basic

## Whiteboard workflow

An efficient workflow hinges on information being available where it is easily accessible by anyone who needs it. Information not attained, recorded, or readily available leads to missed charges, service delays, and poor customer experiences. The Whiteboard feature is one area where a wealth of information may be viewed or edited as needed. This begins with collecting and recording the information that needs to be available during the visit.

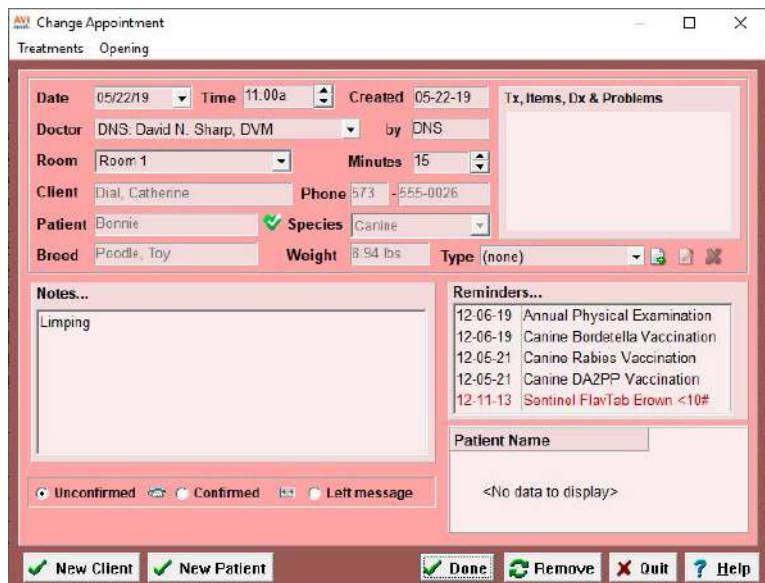


## Appointment

To utilize the Whiteboard fully, it is important to gather as much information as possible, as early as possible and record it. This should begin with the initial call when the appointment is created. The appointment notes field should contain any client communication given and the services, items and problems that it is known they will be receiving should be entered into the Tx, Items, Dx and Problems area.

The collection of information that may be automatically copied to other areas of the program begins with the creation of the appointment.

1. In the **Notes** area, add information that the client may provide pertaining to the behavior or condition of the patient such as recent eating and drinking habits, how active the patient is, etc. This information can be auto-copied to the Whiteboard Checked-In tab for viewing later.



# Whiteboard — Basic

2. In the **Tx, Items, Dx & Problems** area, choose the services, inventory items and/or any problems the client has communicated upon making the appointment. These entries can automatically scheduled on the Whiteboard schedule tab.
3. It is also important to choose a **Doctor** for the appointment, if possible. This allows AVImark to assign that doctor on the Whiteboard as the doctor performing the activities that are chosen for the appointment.

## Checking in

When the patient arrives, it is a good idea to reopen the appointment and add any additional information in the notes window that the client may provide. Remember that a time/date stamp (**Ctrl+ D**) will identify who entered the information and when so it will be easy to tell what information was known, when it was known, and by whom. It is also a good time to add any additional services to the Tx, Items, Dx & Problems area that the client may have decided to have performed while the patient is in the hospital. You may edit the appointment either from the Appointment Calendar or from the Schedule tab of the patient.

Checking the patient in is required to use the Whiteboard feature. Checking the patient in also allows several things to take place automatically. There are several ways to check the patient in:

- The patient may be pulled up on the CID and checked in from their appointment in the schedule tab by doing a **right-click** on the appointment and choosing Check-in. The patient will be checked in and automatically assigned the status of Outpatient. If the patient has a boarding reservation, they may be checked-in, the same way from the boarding reservation on the Schedule tab. The Whiteboard status will automatically be assigned as Boarded.
- The patient may also be checked in directly from their appointment on the Appointment Calendar. Locate the appointment, then **right-click | Check-in**. As from the Schedule tab, the status on the Whiteboard will automatically be set as Outpatient.
- The patient may also be checked in from their boarding reservation on the Boarding calendar. **Right-clicking** on the reservation in the Boarding calendar, and choose **Check-in/out**. You will have the choices of Boarding, Hospitalization, and Other. The choice you make here will reflect the status assigned to the patient on the Whiteboard.
- If the patient does not have an appointment or boarding reservation, they may be checked in directly from the CID by **right-clicking** in the patient area and choosing **Whiteboard | Check-in** or use the **F6** key. The patient will automatically be assigned the status of Outpatient.



# Whiteboard — Basic

- The patient may also be checked in from the **Arriving** tab of the Whiteboard.
- Once the patient is checked in, they will appear on the Whiteboard Checked-in tab with the appointment notes and their known activities viewable when the options to do so have been set. The User ID of the activity will default to the doctor chosen for the appointment.

## During the visit

Once the patient has been checked in, activities on the Whiteboard may be posted to Medical History as they are completed.

- Simply **right-click | Post** on the activity to post it to Medical History. Activities that have been posted to Medical History will appear on the Whiteboard in gray. Activities that have not yet been posted to Medical History will appear in red (due or overdue) or black (due in the future).
- Additional activities may also be added directly onto the Whiteboard for the patient to be performed later. **Right-click** in the patient activities area, **Choose** and select the list from which you wish to add the activity; Treatments, Items, Problems, even Diagnosis may be selected.
- When following a protocol in which nothing is entered into Medical History until it has been performed, administered, or it is known that it will be leaving with the patient, it leaves little question as to what has been done and what has not yet been done during the patient's visit.

The screenshot shows the Whiteboard application window with the 'Checked-in' tab selected. It displays a table of patient arrivals and a list of activities.

Client	Patient	Unposted	In Date	In Time	Waiting	Out Date	Out Time
Dial, Catherine	Bonnie	✓	05-22-19	10:01a	4:59	05-22-19	1:00p
Susman, Kathy	Jake		05-22-19	10:09a	4:52	05-22-19	1:00p
Parsons, Carl	Maddie		05-22-19	10:09a	4:51	05-22-19	1:00p


Start	Time	User ID	Code	Description	Quantity	UseIn
05-22-19	10:12a		505	Radiograph, Primary View	1	<input type="checkbox"/>
Needs to be anesthetized for radiographs.						
05-22-19	10:12a		506	Radiograph, Secondary View	1	<input type="checkbox"/>

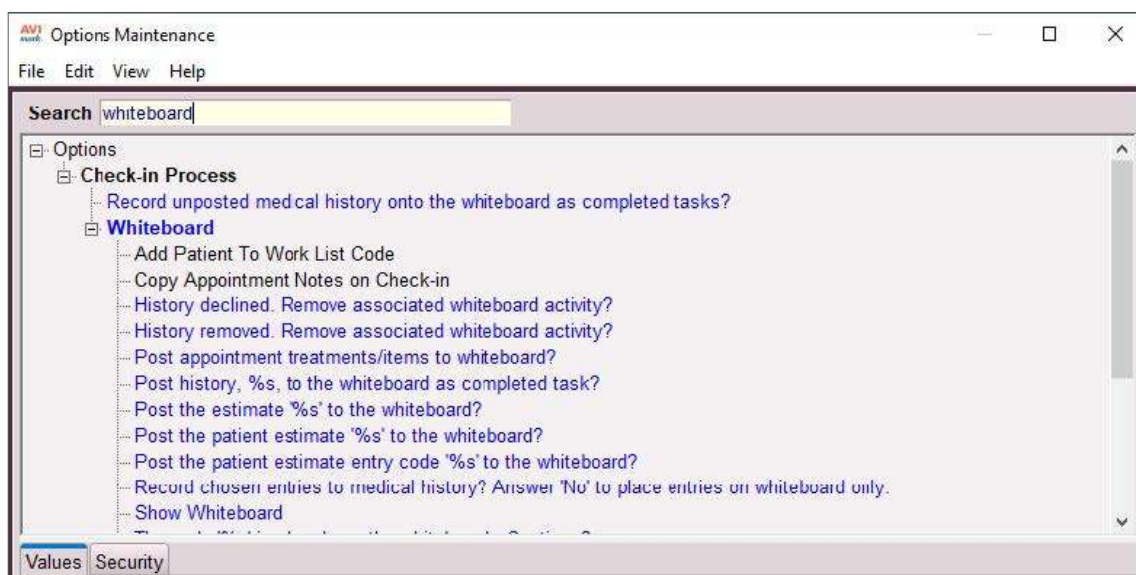
Buttons:  Show Completed,  Today Only,  Done

# Whiteboard — Basic

- Census notes are begun automatically using the appointment notes but may be edited or added to during the course of the visit to communicate findings, the time the patient will be ready to leave, etc. Keep in mind that census notes do not get automatically saved upon patient checkout. They should be used primarily for inter-office communication about the current visit. When the patient is checked out, they will be automatically removed from the Whiteboard and the census notes will be removed as well. If there is any content in the census notes that should be saved, it will need to be copied to another location before checkout.
- Notes entered on individual activities will be saved as medical history notes when the activity the notes are on is posted to medical history.
- When the visit is complete and the client has been invoiced, the patient will be removed from the Whiteboard automatically. Patients with a status of Boarded, Hospitalized or Other will require checkout from their reservation.

## Whiteboard options

- To begin with customizing the Whiteboard, click on the wrench icon  in the CID speed bar to access the Options Maintenance window.
- In the **Search** field, you may enter the description of the option you are looking for or click on the + next to the appropriate option.



# Whiteboard — Basic

## Record unposted medical history to Whiteboard as completed tasks?

- **Yes** - Prompts medical history entries, that are posted to Medical History directly (not from the Whiteboard), to automatically appear on the Whiteboard as having been completed. If the entries are posted from the Medical Condition Record, from an estimate or directly from the Treatment or Inventory List, it will still appear on the Whiteboard for the patient in gray.
- **No** - This option will not add unposted medical history to the Whiteboard as completed.

## Highlight 'Waiting' after elapsed minutes

- **Number of minutes** - Amount of time that the patient will be on the Whiteboard before the number of minutes in the patient Whiteboard entry Waiting column turns red to draw attention.



This option works in conjunction with the **Set Patient Waiting on Check-in and Set Patient Waiting on Boarding Check-in** options and the **Waiting** column must be shown in order to see the waiting number of minutes.

---

## Set 'Patient Waiting' on Check-in and set 'Patient Waiting' on Boarding Check-in

- **True** - This option will start the count down for the number of minutes set in the Highlight Waiting after elapsed minutes option. The minutes will turn red in the Waiting column when the correct number of minutes has passed since the check-in time.
- **False** - Disables this feature and will not start timer when patient is checked in to the hospital.

## Copy Appointment Notes on Check-in

- **True** - Copies the notes entered into the notes area of an appointment to be copied to the patient Whiteboard entry when the patient is checked in from their appointment
- **False** - Does not copy appointment notes to the patient Whiteboard entry when the patient is checked in for their appointment

## Post appointment treatments/items to the Whiteboard

- **True** - Automatically copies the treatments or items selected for the appointment to the Whiteboard as activities to be performed for the patient

# Whiteboard — Basic

- **False** - Does not copy the treatments or items selected for the appointment to the Whiteboard as activities to be performed for the patient

## View (all) Users by default

- **True** - Results in the (all) user selection to appear by default in the User drop-down list in the Schedule tab of the Whiteboard
- **False** - Displays the user that is currently logged into AVImark as the default of the Schedule tab

## Prompt for Each Entry

- There are four of these options:
  - ◆ From Appointment
  - ◆ From Estimate
  - ◆ From SOAP
  - ◆ From Whiteboard
- **True** - The New Whiteboard Activity window will open for each entry selected for posting to the Whiteboard from the appropriate area. This option is convenient when it is necessary to set repeat and frequency options on specific entries but it will prompt for all entries, one at a time when selecting a multiple of entries at once or posting an entire estimate to the Whiteboard.
- **False** - This will suppress the New Whiteboard Activity window from displaying for the selected option

## Customizing the view of the Whiteboard

The information the Whiteboard shows may be customized by choosing which columns to show, setting the width of the columns, renaming the column headers, selecting the notes text to view, etc. These settings are specific to the computer they are made on but may be exported to a file then imported to other AVImark computers on the network.

# Whiteboard — Basic

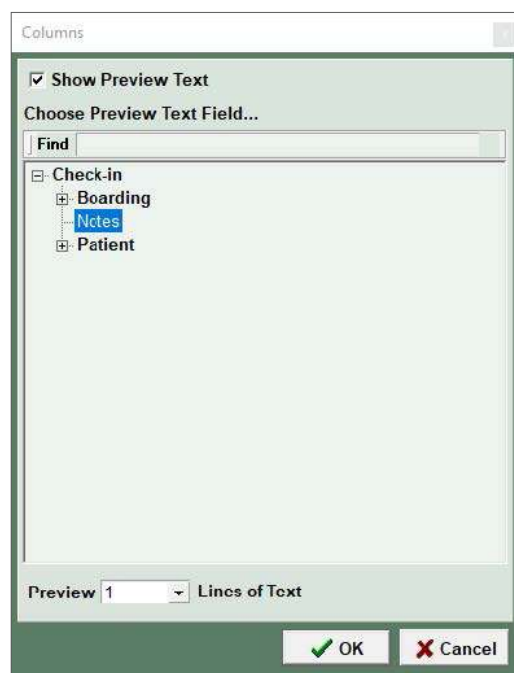
## Viewing Patient Activities in the checked in tab

In order to view the activities specific to the patient selected in the checked in tab, click **View | Patient Activities**. A patient's activities area will appear in the lower area of the Whiteboard window. When a patient is chosen (highlighted) in the patient list, scheduled activities for that patient will be displayed in the activities area.

## Viewing Notes in the checked in tab

Notes that were originally entered on the patient's appointment may be viewed and edited on the Whiteboard as census notes. Notes entered on activities may also be viewed.

- Highlight the patient name then click on **View | Preview Text**.
- The green Columns window will open. Highlight **Notes** and check the **Show Preview Text** box. Repeat these steps with an activity selected and activity notes will also appear in the patient activities window.



- The notes may be edited by, **right-clicking** on the patient entry and selecting **Notes** or select the entry and use the F5 function key on your keyboard. The notes window will open where the notes may be edited.

# Whiteboard — Basic

- These notes will appear under the entry when the notes window is closed by clicking on Done. If the notes are too lengthy to view completely beneath the entry, hold the mouse pointer over the notes on the Whiteboard and the notes will display in their entirety.



The screenshot shows the Whiteboard application interface. At the top, there are tabs for 'Arriving', 'Checked-in', and 'Schedule'. Below the tabs is a table with columns: Client, Patient, Unposted, In Date, In Time, Waiting, Out Date, and Out Time. The table contains three rows of data. To the right of the table is a notes window with a list of items: 'More Stuff', 'Notes', and 'Referrals'. Below the notes window is a list of items with dates: 'In <10# 12-11-13', 'mination 12-06-19', 'ccination 12-06-19', and 'nation 12-05-21'. A note is visible under the 'Susman, Kathy' entry: 'DNS: 05-22-19 at 3:03p: Jake is coming in for his vaccinations but his owner also mentioned that he has been scooting so may need his anal glands expressed.'

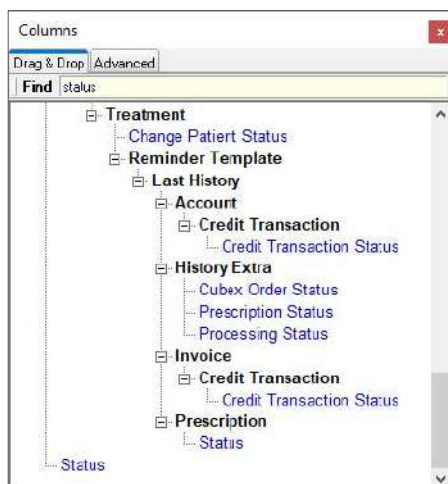
Client	Patient	Unposted	In Date	In Time	Waiting	Out Date	Out Time
Dial, Cathorine	Bonnie	✓	05-22-19	10:01a	5:06	05-22-19	1:00p
Susman, Kathy	Jake		05-22-19	10:09a	4:59	05-22-19	1:00p
Parsons, Carl	Maddie		05-22-19	10:09a	4:58	05-22-19	1:00p

- Once the notes have been made viewable, it is easy to toggle the view on and off by clicking on (menu) **View, Show/Hide Preview**.

## Choosing viewable Columns

The informational columns in the Whiteboard may be hidden or viewable as preferred in all tabs.

- From the menu, click on **View | Columns**.
- Type the description in the **Find** field of the Columns window. AVImark will automatically filter the column names.

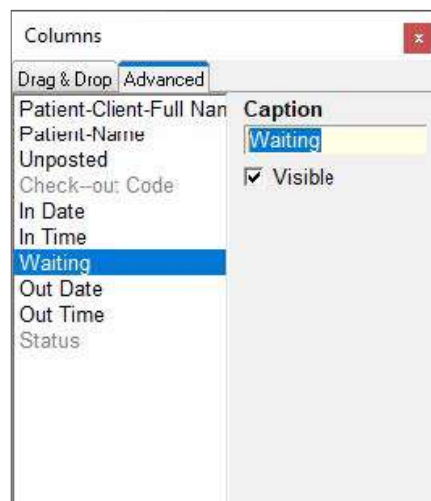


- To choose a column, click on the appropriate column, hold and drag the column name to the header area. When the two green arrows appear, release the mouse button.
- The order of the columns may be changed by dragging them and dropping to the preferred position.

# Whiteboard — Basic

## Renaming Columns

- Click on **View | Columns** or **right-click** in the patient area and choose **View | Columns**.
- In the columns window choose the **Advanced** tab. A list of all viewable columns will be displayed. Column names in black are columns that are currently viewable. Those in gray are columns that were once viewable but have been removed.



- Highlight the appropriate column and type in the appropriate name in the Caption field.
- Click on the X in the upper right corner of the columns window and the column name will immediately change to the name entered into the Caption field.

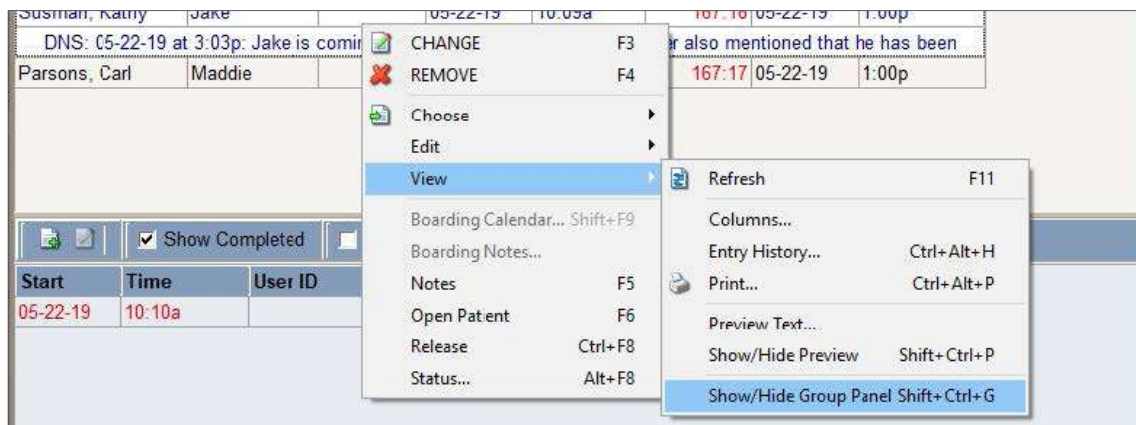
## Grouping by Column

The Whiteboard information may be grouped by any viewable column. Grouping will allow for the collapse or expansion by each value in the column. In this way, specific information may be viewed without having to search through unwanted information.

To group the Whiteboard patients by a column, the group panel must first be made viewable.

- From the menu, click on **View | Show/Hide Group Panel**. A gray colored group panel will appear above the column headers.

# Whiteboard — Basic



- Drag the column header from the column header area into the group panel to group by the column value.



- Choose **Group Panel** again to hide the group panel while leaving the information grouped by the chosen header.






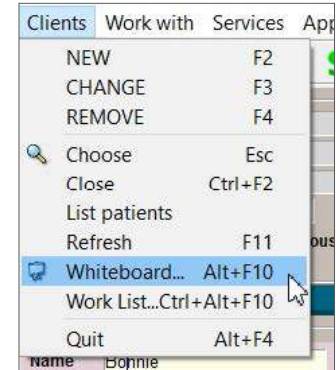
# Whiteboard — Advanced

# Whiteboard — Advanced

## Accessing the Whiteboard

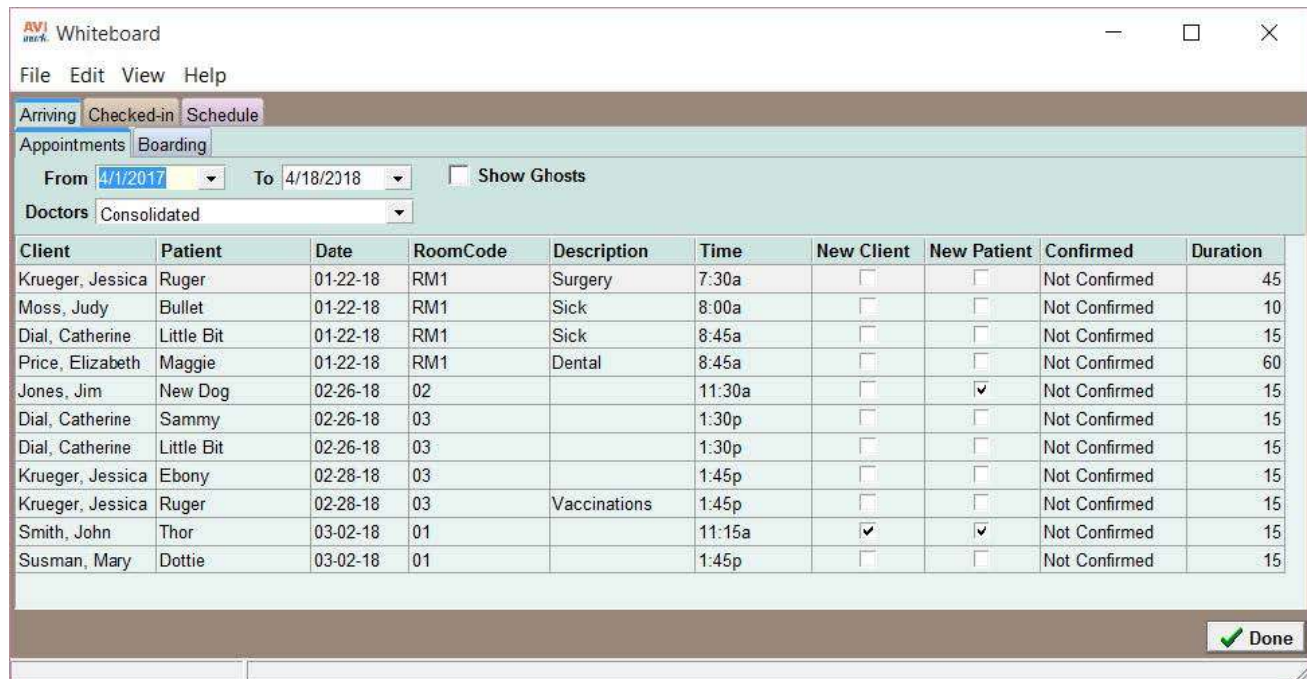
The Whiteboard can be accessed from multiple areas within AVImark:

- **Clients Menu** - Access directly from the Clients menu on the CID.
- **Alt + F10** - Use these hot-keys to open the Whiteboard from the CID
- **CID Button** - Utilize the CID Whiteboard button  to quickly display the Whiteboard.
- **Patient Area** - Right-click on the patient and choose Whiteboard.
- **Patient Schedule tab** - From within a Patient's Schedule tab, right-click | Whiteboard.
- **Boarding Calendar** - Open the Boarding Calendar and right-click | Whiteboard.



## Arriving tab

In the arriving tab you may view both appointments and boarding reservations for a selected date range.



A screenshot of the AVI Whiteboard software interface. The window title is 'AVI Whiteboard'. The menu bar includes 'File', 'Edit', 'View', and 'Help'. The 'Arriving' tab is selected, with sub-tabs for 'Checked-in' and 'Schedule'. Below the tabs, there are filters for 'Appointments' and 'Boarding', a date range selector (From: 4/1/2017, To: 4/18/2018), a 'Show Ghosts' checkbox, and a 'Doctors' dropdown menu set to 'Consolidated'. The main area contains a table with the following columns: Client, Patient, Date, RoomCode, Description, Time, New Client, New Patient, Confirmed, and Duration. The table lists several appointments, including surgery, sick visits, dental, and vaccinations. A 'Done' button with a green checkmark is located at the bottom right of the table area.


Client	Patient	Date	RoomCode	Description	Time	New Client	New Patient	Confirmed	Duration
Krueger, Jessica	Ruger	01-22-18	RM1	Surgery	7:30a	<input type="checkbox"/>	<input type="checkbox"/>	Not Confirmed	45
Moss, Judy	Bullet	01-22-18	RM1	Sick	8:00a	<input type="checkbox"/>	<input type="checkbox"/>	Not Confirmed	10
Dial, Catherine	Little Bit	01-22-18	RM1	Sick	8:45a	<input type="checkbox"/>	<input type="checkbox"/>	Not Confirmed	15
Price, Elizabeth	Maggie	01-22-18	RM1	Dental	8:45a	<input type="checkbox"/>	<input type="checkbox"/>	Not Confirmed	60
Jones, Jim	New Dog	02-26-18	02		11:30a	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Not Confirmed	15
Dial, Catherine	Sammy	02-26-18	03		1:30p	<input type="checkbox"/>	<input type="checkbox"/>	Not Confirmed	15
Dial, Catherine	Little Bit	02-26-18	03		1:30p	<input type="checkbox"/>	<input type="checkbox"/>	Not Confirmed	15
Krueger, Jessica	Ebony	02-28-18	03		1:45p	<input type="checkbox"/>	<input type="checkbox"/>	Not Confirmed	15
Krueger, Jessica	Ruger	02-28-18	03	Vaccinations	1:45p	<input type="checkbox"/>	<input type="checkbox"/>	Not Confirmed	15
Smith, John	Thor	03-02-18	01		11:15a	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Not Confirmed	15
Susman, Mary	Dottie	03-02-18	01		1:45p	<input type="checkbox"/>	<input type="checkbox"/>	Not Confirmed	15

# Whiteboard — Advanced

- You may toggle between the two sub-tabs of Appointments and Boarding by simply clicking on the one you wish to view.
- Select a date range in the **From** and **To** fields and AVImark will automatically show appointments or boarding reservations for that date frame.
- Check the **Show Ghosts** check box in order to include the viewing of appointments or reservations that have been kept, or marked as Canceled, No show, Rescheduled, or Late.
- To show only the appointments made for a specific doctor, choose the doctor from the **Doctor** dropdown.

## Checking in

- Patients may be checked in from the Arriving tab of the Whiteboard. Choose the appropriate entry and **right-click | Check-in**.
- If the check-in is performed on an appointment reservation, the patient will be checked in as an Outpatient.
- If this is performed on a boarding reservation, the choices of Boarding, Hospitalized and Other will be available to choose from as to the status of the check-in.



The screenshot shows the AVImark Whiteboard application window. It has a menu bar (File, Edit, View, Help) and three tabs: Arriving, Checked-in, and Schedule. The 'Arriving' tab is active. Below the tabs is a table with columns: Status, Sub-Status, Last, Patient, Species, Breed, Sex, Allergy, Pre-Med, RTG, RTG Time, and O Contact. The table contains two rows of data. The first row is highlighted in yellow and has a context menu open over it, showing three items: '03-23-18 at 9:00a: Spay & Nail Trim', '03-23-18 at 9:43a: Sx Complete', and '03-23-18 at 1:59p: Awake & Alert'. The second row is also highlighted in yellow.

Status	Sub-Status	Last	Patient	Species	Breed	Sex	Allergy	Pre-Med	RTG	RTG Time	O Contact
Hospitalized	Surgery	Susman	Bonnie	Canine	Poodle, Toy	F	Flea Allergy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4:00p	<input checked="" type="checkbox"/>
Hospitalized	Sick	Jones	Flesh	Canine	Basset Hound	M	NONE	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>

## Checked-in tab

Many actions may be performed directly in the Whiteboard such as creating a list of services to be performed, posting services and items to Medical History, scheduling repetitive tasks, assigning tasks to the appropriate users, recording notes and more.

# Whiteboard — Advanced

## Adding & viewing Patient Activities from Check-in tab

### Displaying Patient Activities within Check-in tab

- From within the Check-in tab access the View menu and select the option for **Patient Activities**.
- Once checked, Activities will be displayed at the bottom of the window by patient.

The screenshot shows the Whiteboard application window with the 'Checked-in' tab selected. The main area displays a table of patient information. Below this table, there is a section for activities with a table header and a message indicating no data is currently displayed.

Status	Sub-Status	Last	Patient	Species	Breed	Sex	Allergy	Pre-Med	RTG	RTG Time	O Contact
Boarded		Johnson	Shadow	Canine	Malamute	S	NONE				
Hospitalized	Surgery	Susman	Bonnie	Canine	Poodle, Toy	S	Flea Allergy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4:00p	<input checked="" type="checkbox"/>
03-23-18 at 9:00a: Spay & Nail Trim 03-23-18 at 9:43a: Sx Complete 03-23-18 at 1:59p: Awake & Alert											
Hospitalized	Sick	Jones	Flash	Canine	Bassett Hound	M	NONE	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>

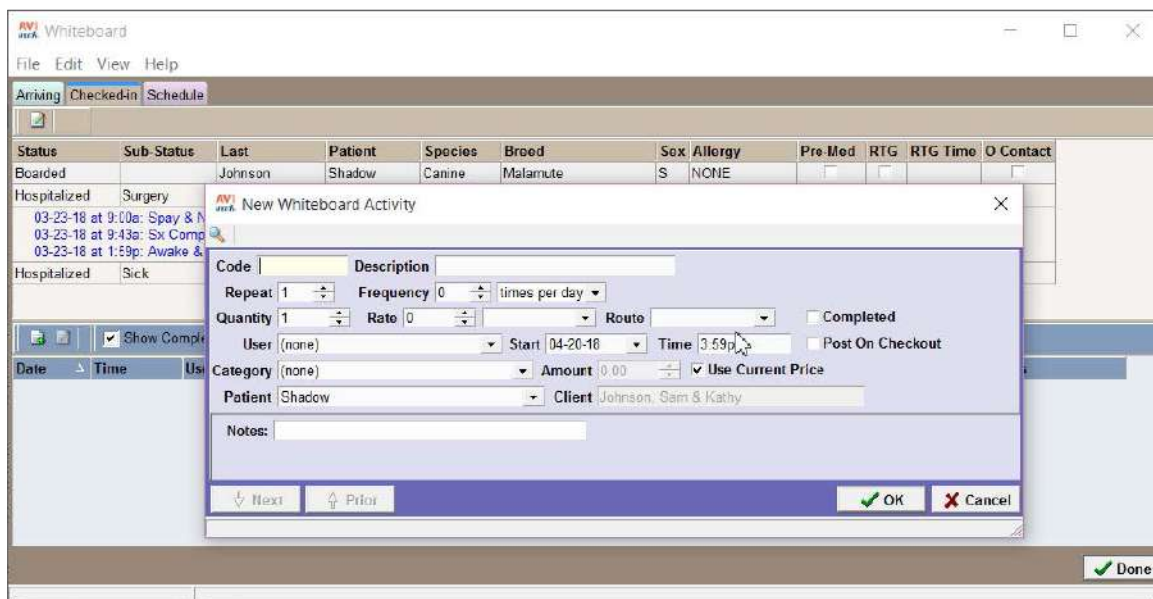
  

Date	Time	User ID	Description	Quantity	Rate	Measure	Sequence	Completed	Notes
<No data to display>									

### Entering Patient Activities from the Check-in tab

- Select the appropriate patient, then **right-click | New** or use the **F2** function key in the patient activities area.
- You may use the Code or Description fields to search for the activity that you wish to add, or, when using the Choose option, choose the activity from the appropriate list.

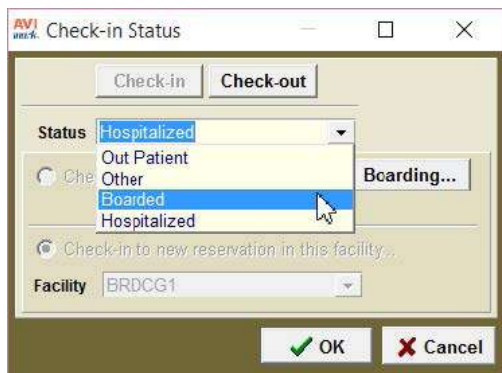
# Whiteboard — Advanced



## Changing patient status

The status of a Checked-in patient can be changed quickly in the Whiteboard.

- **Right-click** on the patient entry and choose Status and the following window will appear.



- From the Status drop-down menu, select the appropriate status.
- When changing a patient's status from Out-Patient to Boarding, Hospitalized or Other select the appropriate facility in the Facility drop-down menu.
- If the patient has a current reservation, select the **Check-in to Current Reservation**. To create a reservation, select the **Boarding** button.

# Whiteboard — Advanced

- If changing a patient's status from Boarded to Outpatient, the patient will be checked out of Boarding. AVImark will post the appropriate charge associated with the reservation into the patient's Medical History if the boarding feature has been set up properly.

## From the CID

- The same functions may be performed from the CID by **right-clicking** in the Patient area, and choosing **Status (Alt +F8)**.
- If the Whiteboard is being grouped by status, the patient will immediately be moved to the appropriate grouping when the change is completed.

## Checking Out (F8)

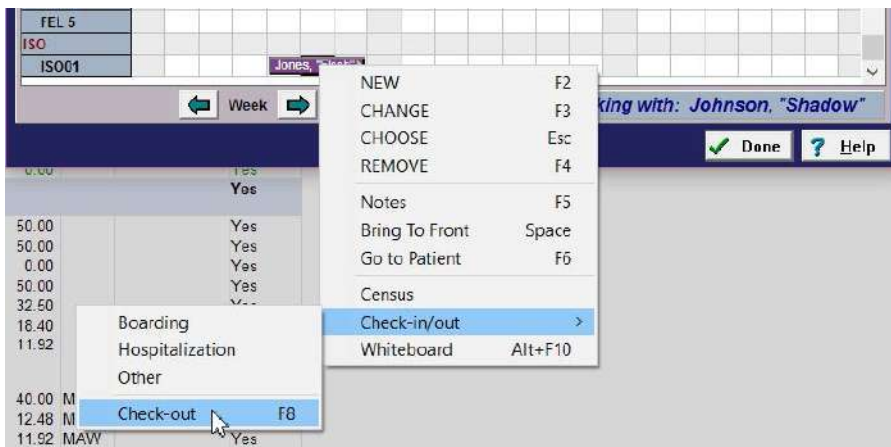
### Automatically

When a patient with an Outpatient status is invoiced, they are automatically checked out from the Whiteboard.

### Manually

If their status is Boarded, Hospitalized, or Other, the patient will need to be checked out either directly from their boarding reservation on the Boarding Calendar or from the boarding reservation on the patient's Schedule tab.

- In the Boarding calendar, **right-click** on the boarding reservation, **Check In/Out, Check Out**.



# Whiteboard — Advanced

- If checking the patient out from the patient Schedule tab, **right-click** on the boarding reservation.
- If the patient has been checked in, the reservation will have a description of Board Checked-In. **Right-click** on the reservation and choose Check-out. When automatic boarding charges have been set up, they will be automatically posted to medical history and the patient may then be invoiced as usual.

## Releasing patients for check-out

- Set the **Control Patient Check-out** option's Value field to **True** if, at this site, Medical History performed is entered at a back computer opening the possibility of the client leaving the clinic before all charges have been entered.
- Thus, the client leaves without paying for all services rendered. In addition to setting the Control Patient Check-out option's Value field to True, you will need to assign the authority to Release Patients for Checkout to a back staff member.
- This will prevent any front staff member from going ahead and releasing the patient before knowing if all of the patient's Medical History performed has been entered.



If you are using the Control Patient Checkout feature you will have to release the patient before AVImark will allow them to be completely checked out.

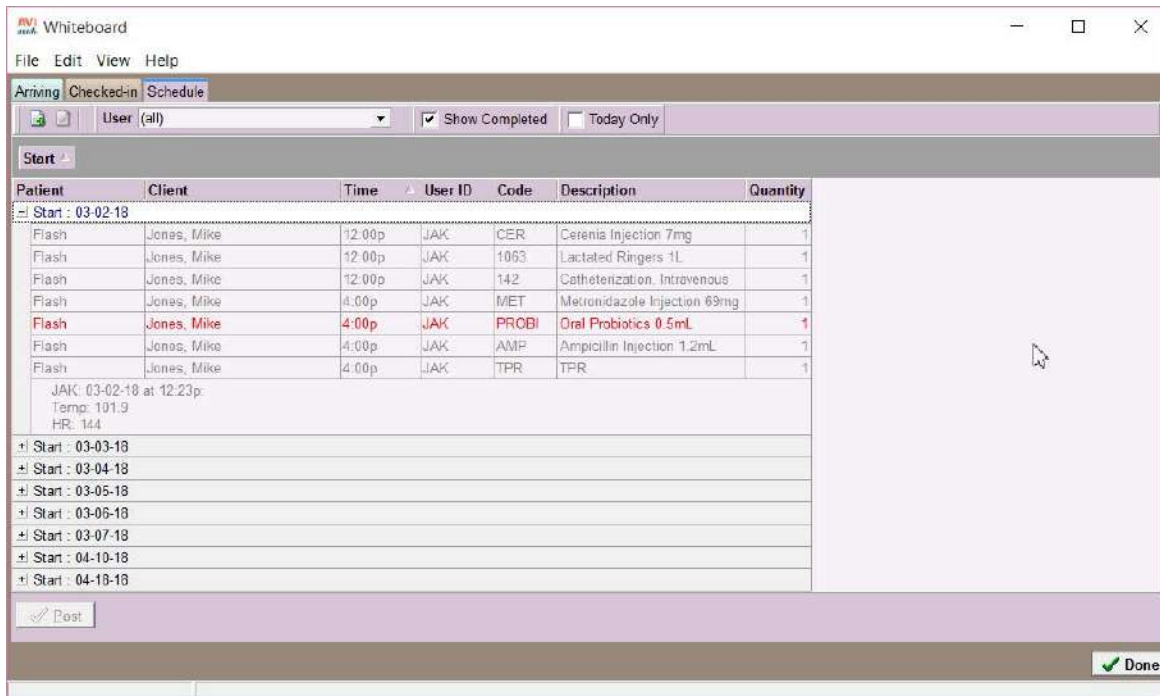


The Release option can also be used without the Control Patient Check-out to indicate when a patient is "ready to go" on the whiteboard with a check-mark in the released column.

## Schedule tab

The Schedule tab is where all activities that have been assigned to all patients that are checked in can be viewed. One reason to assign users to activities is that it allows for quickly sorting activities in the schedule tab by the user that is responsible for performing them. Any staff member may use the User drop-down and choose the appropriate user.

# Whiteboard — Advanced



- If a user does not appear in the User drop-down, **right-click** in the User field and choose Include Users to make all active AVImark users appear in the drop-down list.

## Adding New Activities in the Schedule tab

- New activities may also be added directly into the Whiteboard in the Schedule tab. **Right-click | New** or use the F2 key and a Select Patient window will open.
- Select the correct checked in patient and click **OK** and a New Whiteboard Activity window will appear.
- You may also click the Check-in button to choose and check in a new patient prior to selecting activities for them.

Code [ ] Description [ ]

Repeat 1 Frequency 0 times per day

Quantity 1 Rate 0 Route [ ]  Completed

User (none) Start 04-20-18 Time 3:59p  Post On Checkout

Category (none) Amount 0.00  Use Current Price

Patient Shadow Client Johnson, Sam & Kathy

Next Prior OK Cancel



# Whiteboard — Advanced

- Once you have chosen the activity, you have the option of changing the information in several fields.
  - ◇ **Repeat:** This is the total number of times that the activity should take place during the patient's stay. When finished in the New Whiteboard Activity window, the code will be entered into the Patient Activities area as many times as set in the Repeat field. This option will only be available in the New Whiteboard Activity window. It will not be available in a Change Whiteboard Activity window.
  - ◇ **Frequency:** In this field, put how many times per day or how many hours between times that the activity needs to be repeated. This option, also, will only be available in the New Whiteboard Activity window. It will not be available in a Change Whiteboard Activity window.
  - ◇ **Quantity:** This is the quantity that will be entered into Medical History for each posting of the activity.
  - ◇ **Rate:** This is the rate at which a medication may be administered. The next field is where the measure of the rate is set.
  - ◇ **Route:** This is the route by which the medication is administered.
  - ◇ **User:** This is the AVImark user responsible for performing the activity. If the correct user is not a doctor, rightclick in the User field, then left-click on Include Users. All active AVImark users will then appear in the user dropdown choices. This option is convenient for activities that do not require a doctor and may be assigned to other staff members. It also allows for all activities to be sorted by the staff members responsible for performing them, providing an activities list per user in the Schedule tab.
  - ◇ **Start:** This is the date that the activity should take place. This will always default to the date that the activity is entered.
  - ◇ **Completed:** Activities may be marked as completed without posting them to Medical History by checking this box or by performing a **right-click | Mark Completed**. This may be reversed by unchecking the Completed box.
  - ◇ **Category:** This field is where a Whiteboard category may be chosen by which it may be sorted. This is helpful when viewing all activities in the Schedule tab.
  - ◇ **Amount:** This is the charge for the activity. It will default to the normal charge for the activity but may be changed hereafter by unchecking the Use Current Price field. When the activity is posted to Medical History, the amount charged will be the amount set in this field.
  - ◇ **Patient:** This is the patient that the activity is attached to.
  - ◇ **Client:** The client of the patient. This information will be set automatically by patient.

# Whiteboard — Advanced

## Viewing Patient Activities

- **Today Only** - Displays all activities due today or past due.
- **By User** - View activities assigned by selected user.
- **By Category** - Display activities by pre-defined whiteboard activities.

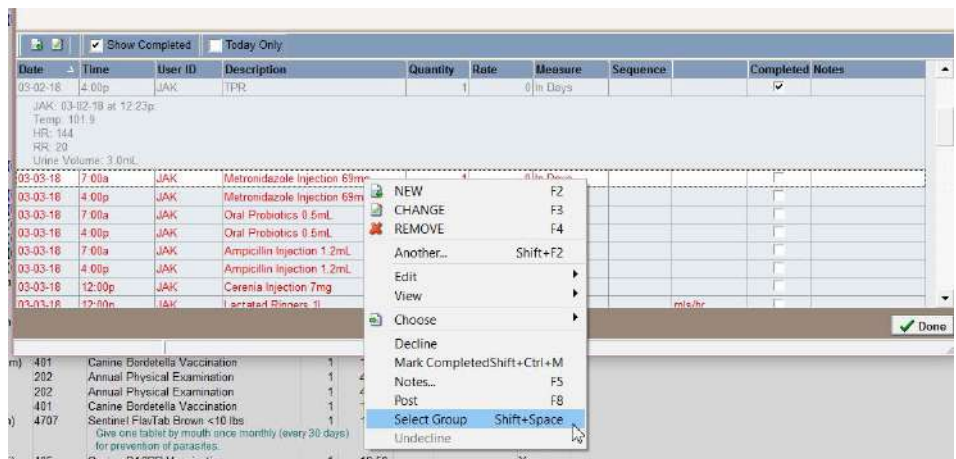
## Making changes to an existing activity

Changes to existing activities may be made by performing a right-click | Change on the activity, selecting the activity and using the F3 function key or simply double left-clicking on the activity. This will open the Change Whiteboard Activity window where the information may be edited.

### Selecting multiple activities

When making changes to activities in the Whiteboard, more than one may be selected at a time using simple keyboard functions. There are three ways to do so.

- The first is to select all activities using **Ctrl+A**. All activities for the selected patient will be highlighted and may then be posted, marked complete etc. at one time.
- To select specific activities, highlight the first then hold the **Ctrl** key down while clicking on each of the activities you would like to select, one at a time. Each activity you click on will be highlighted as a selection.
- To select a group or block of activities at one time, highlight the activity at the top of the block then hold the **Shift** key down and hold it then **left-click** on the bottom activity of the block you wish to select. The entire continuous block of activities will then be highlighted and may all be edited, posted, marked as completed, etc at one time.



# Whiteboard — Advanced

## Posting

### Posting estimates to the Whiteboard

AVImark allows estimates that have been previously saved for a patient to be posted to the Whiteboard.

- In the patient Estimates tab, **right-click** on the appropriate estimate and choose Post to Whiteboard.
- All estimate entries will be posted to the Whiteboard as activities for the patient.



The patient must already be checked in for this option to work.

---

### Posting Medical Condition Record Plans to the Whiteboard

You may post from the Plan area of the Medical Condition Record to the activities area of the Whiteboard.

After the patient has been checked in and appears on the Whiteboard, treatments and items may be posted directly from the Plan area of the MCR to the activities area of the Whiteboard for the patient.

- **Right-click** on the treatment(s) or item(s) in the MCR and choose Post to Whiteboard. The selected entries will be copied to the Whiteboard.

### Posting from the Whiteboard

You may post activities as they are completed from the Whiteboard Schedule or Checked-in tabs directly to medical history. When following a protocol that designates only completed services are posted to medical history, this allows for a quick view of what has and has not yet been completed for the patient.

- To post activities to medical history, **right-click** on the activity and choose Post or select the activity and use the **F8** key on the keyboard.

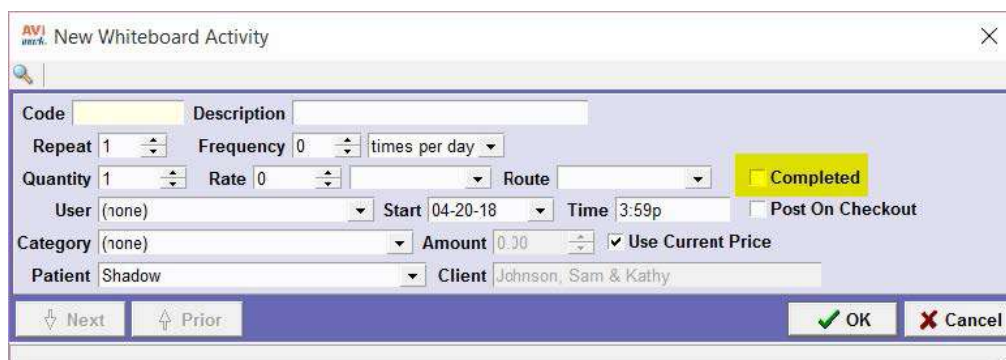
# Whiteboard — Advanced

- To mark the activity as completed without posting it to the medical history of the patient, **right-click** on the activity, and choose Mark as Completed or use the combination of **Shift+Control+M** keys to mark it as completed which will gray it out on the Whiteboard.

These functions may be performed in both the Checked-in tab and the Schedule tab for selected activities.

## Marking complete (Shift+Ctrl+M)

The Completed checkbox is to be checked for those activities you want to mark as done that will not be posted into the patient's Medical History.



The screenshot shows a software window titled "New Whiteboard Activity". It contains several input fields and controls: "Code" (text), "Description" (text), "Repeat" (1), "Frequency" (0), "times per day" (dropdown), "Quantity" (1), "Rate" (0), "Route" (dropdown), and a highlighted "Completed" checkbox. Other fields include "User" (none), "Start" (04-20-18), "Time" (3:59p), "Post On Checkout" (checkbox), "Category" (none), "Amount" (0.00), "Use Current Price" (checked), "Patient" (Shadow), and "Client" (Johnson, Sam & Kathy). At the bottom are "Next" and "Prior" buttons, and "OK" and "Cancel" buttons.

- When the activity has been administered to the patient and you want to mark it as completed. Any entry marked as completed will not be posted into Medical History when posted.
- This will prevent other staff members from duplicating work that does not get recorded into Medical History but still has to be done while the animal is in the hospital.

## Declining

- To mark a service as declined, select the appropriate service, **right-click | Decline**. The service will then be posted to medical history and marked as declined.
- After marking the service as declined, you can un-decline a service by selecting **right-click | Un-decline**. This will take the declined service out of the patient's medical history.

# Whiteboard — Advanced

## Whiteboard advanced options

### Record unposted medical history onto the Whiteboard as completed tasks?

This option allows the user to determine if a patient's un-posted medical history should be posted to the 'Whiteboard' at the time the patient is checked-in.

- Setting this Value to **Prompt** will display the message and allow the user to select Yes or No to record the un-posted history.
- Setting the Value to **Yes**, will cause the un-posted transactions to be automatically posted to the Whiteboard.
- No, will prevent the un-posted transactions from being posted without displaying the confirmation message. (User Specific Option)

### Add Patient to Work List Code

Automatically adds a patient to a list when checked-in, by using the new Advanced Option "Add Patient to Work List Code". (User Specific Option)

### Copy Appointment Notes on check-In

Set the Value to True and the notes associated with an Appointment reservation will automatically be copied to the **right-click | Notes** option within the Whiteboard Check-in tab. (Site Specific Option)

### View Users by default

In the Whiteboard, to only display scheduled activities for the currently logged in User, set the Value to False. If the Value is set to True, when Whiteboard is opened all scheduled activities will be displayed for all users. (User Specific Option)

### Show Whiteboard

At the time the patient is checked-in, you can have 'Whiteboard' automatically displayed by setting the Value to True. Setting the Value to False, will also check the patient in and add the check-in to 'Whiteboard' but will not open 'Whiteboard'. (User Specific Option)

# Whiteboard — Advanced

## Dosage scheduling

The following options are available for the specific times each dosage should be performed for a particular schedule. When creating repeats of a specific activity, these specified times will automatically be assigned to the repeats. (User Specific Option)

- **Q.D.** - One time per day
- **B.I.D.** - Two times per day
- **T.I.D.** - Three times per day
- **Q.I.D.** - Four times per day
- **Variation Minutes** - For dosage schedules of more than four times daily, set the number of minutes you would like elapsed between each administration. The dosage schedules for more than four times daily will be automatically set based on the times specified for the Appointment Calendar.



### Example:

- **Variation is set to sixty minutes.**
- **Appointment Calendar's start and stop times are set as 8:00 am and 5:00 pm.**
- **Repeats, of an activity, is set to six.**
- **When the repeats are created they will have times automatically set of 8:00 am, 9:00 am, 10:00 am, 11:00 am, 12:00 pm, and 1:00 pm.**

---

## Prompting for entries

Set the Value to **True** to auto-prompt the New Whiteboard Activity window when treatments or items are posted to Whiteboard from the following areas: (User Specific Option)

- Appointment Reservations
- Estimates
- SOAP

## Patient Waiting

- Highlight "Waiting" After Elapsed Minutes
- Set "Patient Waiting" on Boarding Check-In
- Set "Patient Waiting" on Check-in

# Whiteboard — Advanced

## Customizing

### Customize Columns

The Columns in the formatted window can be arranged in the order you would like them to appear.

- To change the order of the displayed Columns use the drag and drop method. Select the Column Heading to be moved, hold the left-mouse button, drag the Column Heading to the desired placement and release the left-mouse button to drop the Column. Arrows will be displayed to indicate where the Heading will be placed.

### Removing Columns

In the formatted window you can customize by Removing Columns.

- To remove displayed columns from the window, **right-click** in the window and select **View | Columns**.
- A Columns window will open. Select the Column Heading you wish to remove, hold down the left-mouse button and drag the Column Heading into the **Columns window | Drag and Drop tab**.

### Adding Columns

In the formatted window you can customize by Adding Columns.

- To Add columns back into the window display, **right-click** in the window and select **View | Columns**.
- A Columns window will open with additional Columns you can add displayed in the Drag and Drop tab. Find the Column you want to add and Select the Column with a **left-click**. Hold down the left-mouse key, drag the column to the desired placement and release the mouse button.



To return the window back to the original view, click on the AVImark icon in the upper left-hand screen and select Default Layout from the drop-down menu.

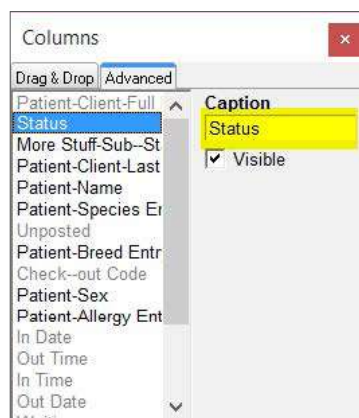
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# Whiteboard — Advanced

## Renaming Columns

The name of a Column Heading can be modified by changing the Heading's Caption.

- To Change the Name of a Column Heading, **right-click** in the window and select **View | Columns**.
- In the Columns window select the **Advanced** tab. All Column Headings currently being displayed will be shown in black and Column Headings no longer being displayed will be shown in grey.



- Select the Column Heading you would like to change the name; in the Caption field enter in the text of your choice for the Column Heading.
- All Columns in the Advance tab can be made to show visible or not, by selecting the Column Heading and checking or unchecking the 'Visible' option.

## Sorting the Columns

There are two options for Sorting the formatted Windows. The Columns can be grouped by panel allowing you to combine entries having the same characteristics into one group. You can also sort by Column Headings.

### Sorting by Column Headings

- **Left-click** on a Column Heading to Sort. With each click, AVImark will sort the Column Heading in ascending, descending or the default sort, as indicated by the caret like symbol on the right side of the Title Bar.



# Whiteboard — Advanced

Status	Sub-Status	Last	Patient	Species	Breed	Sex	Allergy	Pre-Med	RTG	RTG Time	O Contact
Boarded		Johnson	Shadow	Canine	Malamute	S	NONE	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Hospitalized	Sick	Jones	Flash	Canine	Bassett Hound	M	NONE	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Hospitalized	Surgery	Susman	Bonnie	Canine	Poodle, Toy	S	Flea Allergy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4:00p	<input checked="" type="checkbox"/>
03-23-18 at 9:00a: Spay & Nail Trim 03-23-18 at 9:43a: Sx Complete 03-23-18 at 1:59p: Awake & Alert											

- A secondary sort can be done by holding the Shift key and selecting the Column Heading you wish to sort.

## Grouping by Panel

- Right-click in the window and choose View | Show /Hide Group Panel.



- Select a Column Heading you would like to sort by. With the appropriate Heading selected on the Title Bar, drag and drop the Column Heading to the grey section above the Title Bar. The entries will now be in a collapsed view. Select on the Plus icon to expand the view of the entries. With each click on the Column Heading, AVImark will sort the Category by ascending, descending or the default sort as indicated by the caret like symbol on the right side of the Title Bar.
- With the appropriate Heading selected, a secondary sort can be done by selecting on the Title Bar, dragging and dropping the Column Heading to the grey section next to the Primary Column Heading. With each click of the Column Heading, AVImark will sort the Category by ascending, descending or the default sort as indicated by the care like symbol on the right side of the Title Bar.

Patient	Client	Time	User ID	Code	Description	Quantity
+  Start : 03-02-18						
+  Start : 03-03-18						
+  Start : 03-04-18						
+  Start : 03-05-18						
+  Start : 03-06-18						

# Whiteboard — Advanced

## Changing Multiple Entries

You have the option to change Multiple Entries at one time in the formatted windows.

- Using your **Ctrl** button you may select random entries to edit. The **Shift** key will allow you to select multiple, consecutive entries.
- Once you have the appropriate entries selected you wish to edit, **right-click | Change** on the entries or use the **F3** hotkey. A Change Entry window will be prompted displaying the information of the first selected entry.
- All fields not containing the same information on each entry will be outlined in yellow.
- Making a change to any of the fields and clicking **Done** will automatically update those fields for all other selected entries.
- Selecting **OK** will display the Notes in the window.

## Width of the Columns

The width of the Columns being displayed can be changed.

- You may expand or narrow the Columns horizontally by moving the mouse pointer over the dividing line, holding down the left mouse button and dragging this line right or left.



Status	Sub Status	Last	Patient	Species	Breed	Sex	Allergy	Pre Med	RTG	RTG Time	O Contact
Boarded		Johnson	Shadow	Canine	Malamute	S	NONE	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Hospitalized	Sick	Jonas	Flash	Canine	Bassett Hound	M	NONE	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Hospitalized	Surgery	Susmah	Bonnie	Canine	Poodle, Toy	S	Fea Allergy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4:00p	<input checked="" type="checkbox"/>
03-23-18 at 9:00a: Spay & Nail Trim											
03-23-18 at 9:43a: Sx Complete											
03-23-18 at 1:59p: Awake & Alert											

# Whiteboard — Advanced

## Other Column Ideas

### Arriving tab - Appointments

Description	Key Word	Area	Displayed as
New Client	New	Appointment	Check Box
New Patient	New	Appointment	Check Box
Room Code	Room	Appointment	Text
Appointment Type	Type	Appointment > Appointment Type Entry > Description	Text
Made By ID	Made	Appointment	Initials
Date Made	Made	Appointment	Date
Time Made	Made	Appointment	Time
Confirmed	Confirm	Appointment	Text
Duration	Duration	Appointment	Integer (mins)

### Arriving tab - Boarding

Description	Key Word	Area	Displayed as
New Client	New	Boarding	Check Box
New Patient	New	Boarding	Check Box
Cage Description	Description	Boarding > Facility	Text
Facility Group	Description	Boarding > Facility > Facility Category	Text
Duration	Duration	Boarding	Integer (days)
Status	Status	Boarding	Text
In	Boarding	Boarding > Facility	Date
Out	Boarding	Boarding > Facility	Date

# Whiteboard — Advanced

## Checked-in tab

Description	Key Word	Area	Displayed as
Patient Status	Status	Check-in	Text
Allergy	Allergy	Patient > Allergy Entry	Text
Cage Name	Facility	Boarding > Facility	Text
Released	Release	Check-in	Text
Admitted by ID	Admitted	Check-in	Initials
Last Visit	Last Visit	Check-in > Patient	Date

## Schedule tab/Patient Activities

Description	Key Word	Area	Displayed as
Completed	Completed	Whiteboard Activity > Checkin	Check Box
Performed Date	Date	Whiteboard Activity > History	Date
Entered by ID	Entered	Whiteboard Activity > History	Initials
Entered Time	TOD	Whiteboard Activity > History	Time
Rate	Rate	Whiteboard Activity	Text
Route	Route	Whiteboard Activity	Text
Rate Measure	Rate	Whiteboard Activity	Text

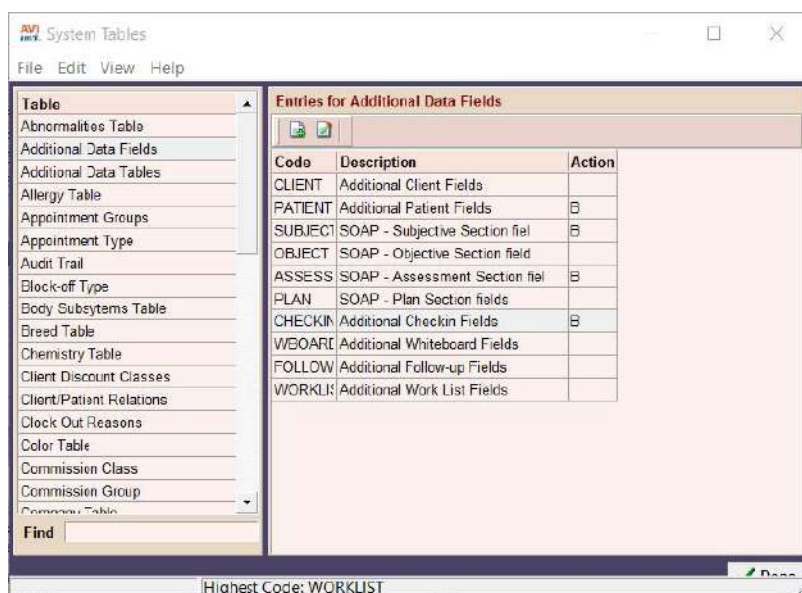
# Whiteboard — Advanced

## Whiteboard additional data fields

### Customize Columns

Additional Data Fields may be created for the 'Checked-in tab' or the 'Schedule' tab.

- From the CID screen go to **Work with | System Tables**.
- Select the Additional Data Fields table.
- In the Entries for Additional Data Fields area, select the area you wish to create the fields for.
  - ◆ By selecting 'Additional Check-in' fields, you can create additional fields.
  - ◆ For the 'Check-in' tab select the 'Additional Whiteboard' fields to create additional fields for the 'Schedule' tab.



- **Right-click** on the correct entry and select More Stuff Fields.
- From the 'Define More Stuff' window, create a field by **right-click | New**.
- In the 'Name' field enter the description of the field you want to create (i.e. Priority, etc.)
- Use the 'Type' drop-down menu to select the best field type for the data that will be entered in the field you are creating. (i.e. Integer, Phrase, etc.)
- Click **Done** to add the field. Then click **OK** and **Done** to close System Tables.

# Whiteboard — Advanced

## Accessing Additional Data Fields from Whiteboard

To record additional patient information into Whiteboard select the tab (either Check-in or Schedule) you created the Additional Data field for.

### Check-in tab

- To open a record after the patient is checked-in, select the patient, **right-click | Change**. The 'Additional Data Fields' will be located at the bottom of the window.
- Enter in the data to record for the patient and click **OK**.

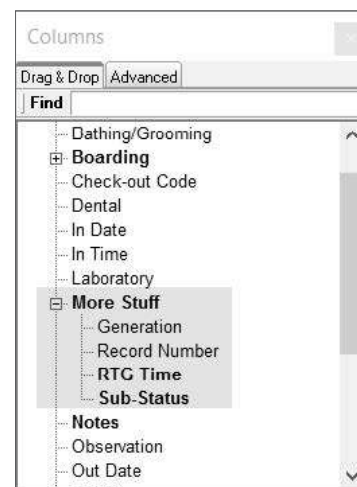
### Schedule tab

- To open a 'Whiteboard Activity' window from the 'Schedule' tab, select the entry, **right-click | Change**. The 'Additional Data Fields' will be located at the bottom of the window.
- Enter in the data to record for the patient and click **OK**.

## Creating Columns from Additional Data Fields

Each 'Additional Data Field' can have its own Column displayed in the Whiteboard. To display the column follow these steps:

- Create the 'Additional Data Field' in System Tables.
- Return back to Whiteboard, select the tab (either Check-in or Schedule) you would like to display the columns, **right-click** in the tab area and select **View | Columns**.
- A Columns window will open with different columns you can select to add to the Whiteboard.
- Use the 'Find' field to locate the 'More Stuff' field you created in System Tables. (i.e. Priority)
- Select the Column with a **left-click**. Hold down the button, drag the column to the desired placement and release the mouse button.



# Whiteboard — Advanced

## Additional Data Field ideas

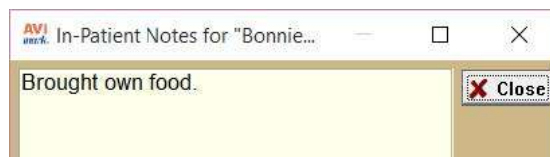
- Sub-Status
- Owner Contacted Check-box
- Pre-Med Check-box
- RTG Time

## Previewing Notes

- The **Show/Hide Preview** option will toggle between displaying and not displaying the notes attached to the window.
- When this option is selected, a checkmark will be displayed to the left of the option in the menu.
- Click the option again to de-select it and hide the notes from being displayed.
- Choose the number of lines of text to be previewed at the bottom of the window.

## Census Notes

- Click the **Show Census Notes** toolbar button to open the Out-patient or In-patient Notes window containing notes attached to the selected patient's Census entry. The patient must be checked into the clinic for the Out-patient or In-patient Notes window will open.
- If the patient is checked into an appointment he or she is considered an Out-patient.
- If the patient is checked into a boarding reservation or for hospitalization he or she is considered an In-patient.
- The title of the Notes window depends upon the current check-in status of the patient, as described above.



## Show Census Notes option

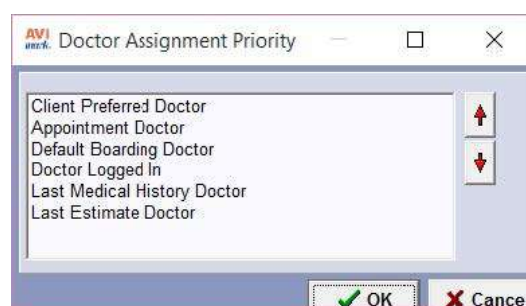
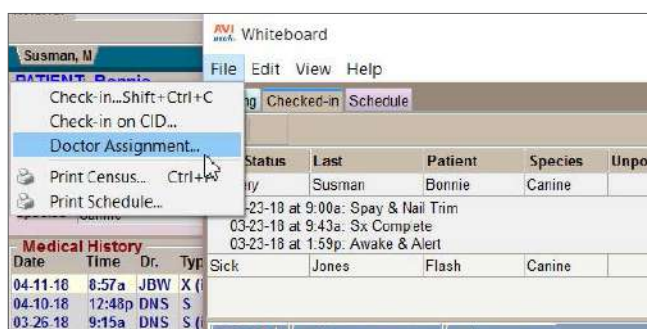
- Set the Value field in the New or Change User Option Value window to True to have a patient's census notes automatically displayed on the CID when the patient is selected.
- With this option selected the census notes will, also, be automatically recorded in the patient's boarding reservation notes window.

# Whiteboard — Advanced

## Other options

### Doctor Assignment

Within the **Whiteboard | File | Doctor Assignment** will display a Doctor Assignment Priority window. This window will display 6 assignment option: Client Preferred Doctor, Appointment Doctor, Doctor Logged In, Last Medical History Doctor, Last Estimate Doctor, and Boarding Doctor. The default order of these options is designed to display in an order that prevents noticeable and unintended changes in the assignment of Admitted By doctors.



- If the Require Admitting Doctor option is set to **TRUE**, the order of the assignment options will be displayed as:
  - ◆ Default Boarding Doctor (Advanced Option Doctor Assigned)
  - ◆ Client Preferred Doctor
  - ◆ Appointment Doctor (doctor assigned to Appointment reservation)
  - ◆ Doctor Logged In
  - ◆ Last Medical History Doctor
  - ◆ Last Estimate Doctor (most recently created Estimate)
- If the Require Admitting Doctor option is set to **FALSE**, the order of the assignment options will be displayed as:
  - ◆ Client Preferred Doctor
  - ◆ Appointment Doctor ( doctor assigned to Appointment reservation)
  - ◆ Default Boarding Doctor (Advanced Option Doctor Assigned)
  - ◆ Doctor Logged In
  - ◆ Last Medical History Doctor
  - ◆ Last Estimate Doctor (most recently created Estimate)



# Whiteboard — Advanced

## Check-in on CID

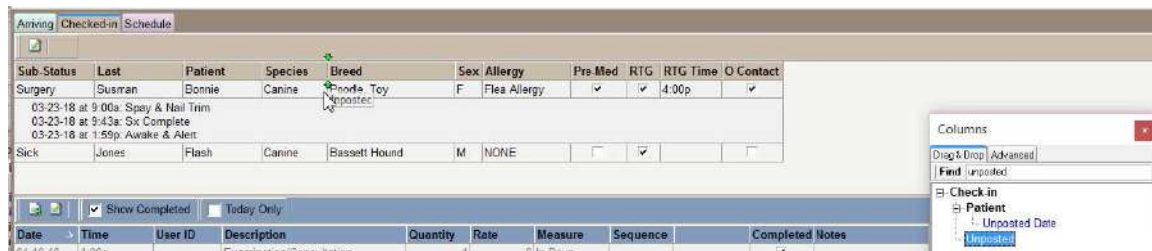
The Check-in on CID option will open the Choose Patient window containing a list of all of the patients owned by the client currently selected on the CID.

- Select the patient you want to check in from the list of patients and click the **Done** button to check the patient in.

## Show Unposted Total

When showing the unposted total column within the whiteboard the option to display this data will also need to be selected.

- Drag out the Unposted Total column in the Checked-In tab of the whiteboard.



- Within the whiteboard window go to the View menu and select **Show Unposted Total**.



- The total unposted amount in the patient's medical history will be displayed automatically.



This total does not include taxes.

# Whiteboard — Advanced

## Practice Examples

### Recreating a written Whiteboard

#	Cage	Patient	Species	Weight	Signalment	Prognosis	Tx	Complete	Called
1	UR	Rivers "Rascal"	C	12#	Mix NM SVR	Limping	Aspirin Pain Relief	✓	Called Pick up after 30'
2		...	C	5#	...	...	...		
3	2nd Room	Horton "Sage"	F	18lbs	Female - S MIX (AKITA)	NEUTER			
4	2nd Room	Krieger "Fog"	C	7lbs	Female - S MIX (AKITA)	Dental Nail Trim	...		
5	2nd Room	Bowers "Harlow"	C	74#	AKITA MIX M 2nd	Neuter / Dental		X	Called
6	3rd Room	Jamerson "Albert"	F	8#	BLK/WHI NM	Blocked Cat	...		
7	1st Room	Walker	K9	7	...	Parvo +	...	Observe	Called Add to chart
8	1st Room	Krieger "Dante"	F	5#	GRY/WHI Female 3MO	DVT	...	Hospital	Called SH
9									

Status	Sub-Status	Last	Patient	Species	Breed	Color	Sex	Weight (lbs)	Allergy	In Date	Out Date	Waiting	Cage	Pre-Med	RTG	RTG Time	O Contact
Out Patient		Johnson	Shadow	Canine	Malamute	Black and White	S	107	NONE	03-21-18	03-21-18	0:44					
Hospitalized	Sick	Jones	Flash	Canine	Bassett Hound	Tri Color	M	15	NONE	03-01-18	03-03-18	0:00	ISO01				
Hospitalized	Surgery	Susman	Bonnie	Canine	Poodle, Toy	Chocolate	F	8.94	Flea Allergy	03-23-18	03-24-18	0:00	HOSP3	✓	✓	4:00p	✓

03-23-18 at 9:00a: Spay & Nail Trim  
 03-23-18 at 9:43a: Sx Complete  
 03-23-18 at 1:59p: Awake & Alert

# Whiteboard — Advanced

## Recreating a Treatment Sheet

Medication/Treatment		7AM	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	Evening
Food: Dry _____ Wet: _____														
Type: <u>Any, Temp</u>		(SU)						(SU) <u>Wants</u>					(JM)	
Temp/HR/RR	T: _____ P: _____ R: _____	100.7 144 20									101 120			
LRSC 35 mL/Hr		(PR)						9:50 per BMR						
✓ w/ Dr. Vommit? _____														
Cerenia 7mg IV - Day 3												(JM)		
Probi: 0.5mL P.O. BID		(SU)										(JM)		
Ampicillin - 150mg IV slow		(SU) 1.2mL										(JM)		
Ondansetron 6.8 mg IV slow, dilute		(SU) 3.4mL										(JM)		
Metronidazole 69mg IV, slow, dilute		(SU)										(JM)		
Clon / SSID to perianum		(SU)					(SU)				(JM/AJ)			
CB/Lines ID		(PR)												
✓ Appl w/ Bm / V/D		(PR)												
buprenorphine 0.015mg IV		(SU) 0.17mL											(JM) 0.17mL	
Buprenorphine 0.015mg IV sid														
↳ (6.8.10mg =														
↓ fluids to 35mL/hr p.c.													(JM)	

*piggy back new bag LRS*

Arriving											Checked-in	Schedule
Status	Sub-Status	Last	Patient	Species	Breed	Color	Sex	Weight (lbs)	Allergy	In Date		
Boarded	Dental	Johnson	Shadow	Canine	Malamute	Black and White	S	107	NONE	03-02-18		
Hospitalized	Sick	Jores	Flash	Canine	Basset: Hound	Tri Color	M	15	NONE	03-01-18		
<input checked="" type="checkbox"/> Show Completed <input type="checkbox"/> Today Only												
Date												
Time	User ID	Description	Quantity	Rate	Route	Complete	Date	By	Time			
- Date : 03-02-18												
12:00p	JAK	Cerenia Injection 7mg	1	0	Intravenous	✓	03-02-18	JAK	12:04p			
12:00p	JAK	Lactated Ringers 1L	1	35 mls/hr	Intravenous	✓	03-02-18	JAK	12:04p			
12:00p	JAK	Catheterization, Intravenous	1	0		✓	03-02-18	JAK	11:35a			
4:00p	JAK	Metronidazole Injection 69mg	1	0	Intravenous	✓	03-02-18	JAK	12:04p			
4:00p	JAK	Oral Probiotics 0.5mL	1	0	Oral	☐						
4:00p	JAK	Ampicillin Injection 1.2mL	1	0	Intravenous	✓	03-02-18	JAK	12:04p			
4:00p	JAK	TPR	1	0		✓						
JAK: 03-02-18 at 12:23p: Temp: 101.9 HR: 144 RR: 20 Urine Volume: 3.0mL												
+ Date : 03-03-18												
+ Date : 03-04-18												
+ Date : 03-05-18												

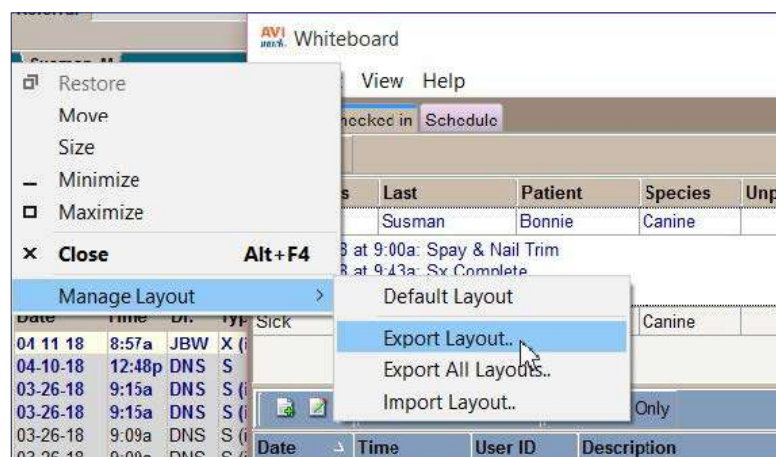
# Whiteboard — Advanced

## Copying/importing Layouts

### Copying the Whiteboard Layout to other workstations

The customization of the Whiteboard is computer specific; however, the Layout may be exported to a file then imported to other computers on the network. The Whiteboard can be viewed the same way without having to manually set it on each computer.

- To export the layout, **left-click** on the AVImark logo in the upper left corner of the Whiteboard window.
- Choose **Manage Layout**
- Click on Export Layout and click **Yes** on the confirm window.



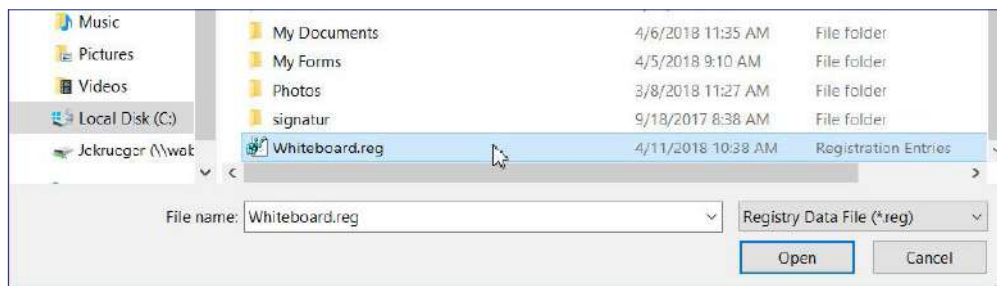
- An Export form layout file window will appear.
- Add a file name and choose **Save**.
- The file will saved in the AVImark folder and a confirmation window will appear.

### Importing the Layout

- To import the Layout to another computer, **left-click** on the AVImark logo in the upper left corner of the Whiteboard window then mouse to Manage Layout then **left-click** on **Import Layout**.
- Click **Yes** on the confirm window.
- An Import from Layout file window will appear.

# Whiteboard — Advanced

- Left-click on the correct file and choose Open.

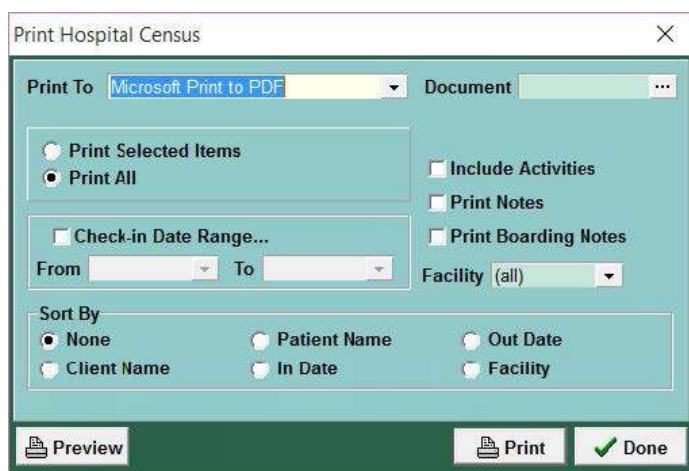


- The Whiteboard Layout from the original computer will be imported to this computer.
- A confirmation window will appear letting you know that the import was successful.

## Printing the Whiteboard

### Print Census (Ctrl+P)

- To print a list of all patients checked- in to the clinic, select **(Menu) File | Print Census**.



- ◆ **Print To**
- ◆ **Doctor** - To limit the information included on the Whiteboard Schedule to only activities scheduled for one doctor, select the desired doctor from the menu in the Doctor field
- ◆ **Whiteboard Category** - Activities can be grouped together or categorized.

# Whiteboard — Advanced



If you are using the categorizing feature and want to print the Whiteboard Schedule for entries that have been grouped into one category select that category from the menu in the Whiteboard Category field.

- ◆ **Date Range** - Allows activities due within a specified amount of time to be printed rather than all activities listed in the schedule tab of the Whiteboard.
- ◆ **Print More Stuff** - Check the Print More Stuff checkbox to have more stuff entries, attached to the activities, included on the Whiteboard Schedule printout.



Leave this option un-checked if you do not want to have more stuff included on the Whiteboard Schedule printout.

- ◆ **Print Notes** - Check the Print Notes option to have the notes, attached to the activities, included on the Whiteboard Schedule.



Leave the Print Notes checkbox unchecked if you do not want to have notes included on the Whiteboard Schedule printout.

- ◆ **Print Completed Activities** - This option includes completed activities specified within the date range.
- ◆ **Categorize by** - The Categorize by: area offers options for organizing the activities contained on the Whiteboard Schedule printout.

- If you want to view the list before you print it select the Preview button.
- Click **Print** to print the list.

Date: 04-11-18		Loving Care Animal Hospital					Page: 1	
WHITEBOARD SCHEDULE								
Category	Code	Description	Quantity	Start	Time	User	Patient	
	SED1	Sedation 1	1	04-10-18	2:50p		3 Susman (Bonnie) Poodle, Toy	
<b>Jessica Krueger, RVT</b>								
	PROBI	Oral Probiotics 0.5mL	1	03-02-18	4:00p	JAK	16 Jones (Flash) Bassett Hound	
	TPR	TPR	1	03-03-18	7:00a	JAK	16 Jones (Flash) Bassett Hound	
	AMP	Ampicillin Injection 1.2mL	1	03-03-18	7:00a	JAK	16 Jones (Flash) Bassett Hound	
	PROBI	Oral Probiotics 0.5mL	1	03-03-18	7:00a	JAK	16 Jones (Flash) Bassett Hound	
	MET	Metronidazole Injection 69mg	1	03-03-18	7:00a	JAK	16 Jones (Flash) Bassett Hound	
	1063	Lactated Ringers 1L	1	03-03-18	12:00p	JAK	16 Jones (Flash) Bassett Hound	
	CER	Cerenia Injection 7mg	1	03-03-18	12:00p	JAK	16 Jones (Flash) Bassett Hound	
	TPR	TPR	1	03-03-18	4:00p	JAK	16 Jones (Flash) Bassett Hound	
	MET	Metronidazole Injection 69mg	1	03-03-18	4:00p	JAK	16 Jones (Flash) Bassett Hound	
	PROBI	Oral Probiotics 0.5mL	1	03-03-18	4:00p	JAK	16 Jones (Flash) Bassett Hound	
	AMP	Ampicillin Injection 1.2mL	1	03-03-18	4:00p	JAK	16 Jones (Flash) Bassett Hound	
	TPR	TPR	1	03-04-18	7:00a	JAK	16 Jones (Flash) Bassett Hound	
	AMP	Ampicillin Injection 1.2mL	1	03-04-18	7:00a	JAK	16 Jones (Flash) Bassett Hound	

# Whiteboard — Advanced

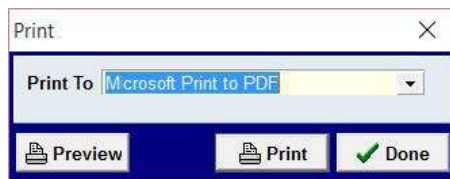
## RC > View > Print

When printing the schedule or the census list from within the Whiteboard it will include pre-defined fields from within the software. If you have customized columns and additional data fields that you would like to include on the printed report you can utilize a right-click option to print the fields displayed on the screen.

- Display the desired columns within the appropriate whiteboard tab

Sub-Status	Last	Patient	Species	Breed	Sex	Allergy	Pre-Med	RTG	RTG Time	O Contact
Surgery	Susman	Bonnie	Canine	Poodle, Toy	F	Flea Allergy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4:00p	<input checked="" type="checkbox"/>
03-23-18 at 9:00a: Spay & Nail Trim 03-23-18 at 9:43a: Sx Complete 03-23-18 at 1:59p: Awake & Alert										
Sick	Jones	Flash	Canine	Basset Hound	M	NONE	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>

- Go to **View (menu) | Print**
- This will display a print dialog box.



- Click **Print** and the columns will print as displayed.

Date:	04-11-18	Loving Care Animal Hospital Whiteboard							Page:	1
Sub-Status	Last	Patient	Species	Breed	Sex	Allergy	Pre-Med	RTG	RTG Time	O Contact
Surgery	Susman	Bonnie	Canine	Poodle, Toy	F	Flea Allergy	True	True	4:00p	True
Sick	Jones	Flash	Canine	Basset Hound	M	NONE	False	True		False



There is a limited amount of space for the columns to print. If there are too many columns chosen the final result may print off of the page. The final result will NOT include previewed notes on the screen only the columns.



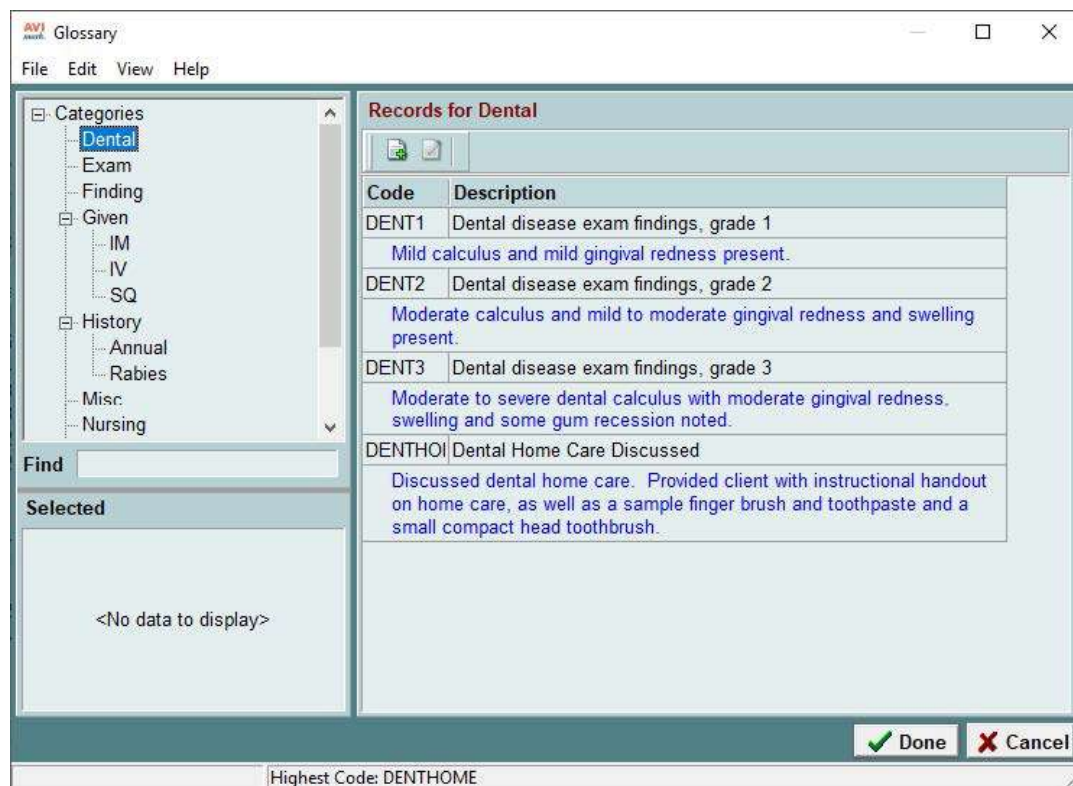
# Notes and Note Glossary



# Notes and Note Glossary

## Note Glossary

The Note Glossary feature in AVImark was designed for creating Note templates that will be used frequently in the patient's medical record. Creating Note templates will help save time and redundancy when entering the Notes about the patient. Some examples of when to use Note templates are: exams, instructions on how procedures should be done or a patient's follow-up.



## Accessing Note Glossary

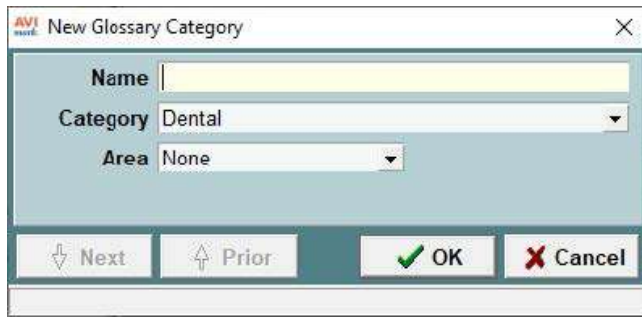
- From the CID click on **Work with | Glossary**. The Note Glossary is designed similar to the Treatment and Inventory List. In the Category window is a tree-style grid to create multiple levels of template categories.
- Click on each **Category** to view each Note template belonging to the category.

# Notes and Note Glossary

## Creating Glossary Entries

### Creating Categories

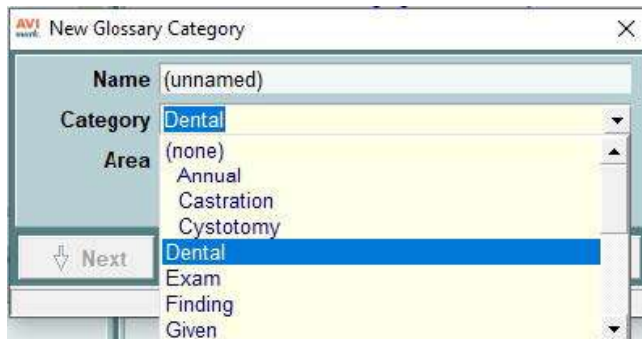
- To add a Note Glossary Category, highlight the category and **right-click | New (F2)**.



- In the **Name** field enter a description of the category, e.g. Examination.
- In the **Category** field, from the drop-down menu select None. Selecting the None option will include this category as a main heading.
- In the **Area** field, from the drop-down menu select the appropriate area in AVImark where the Note templates will be used. When accessing the Glossary in the selected area, the Note templates for this category will automatically be defaulted for selection, e.g. History.
- Select **OK**.

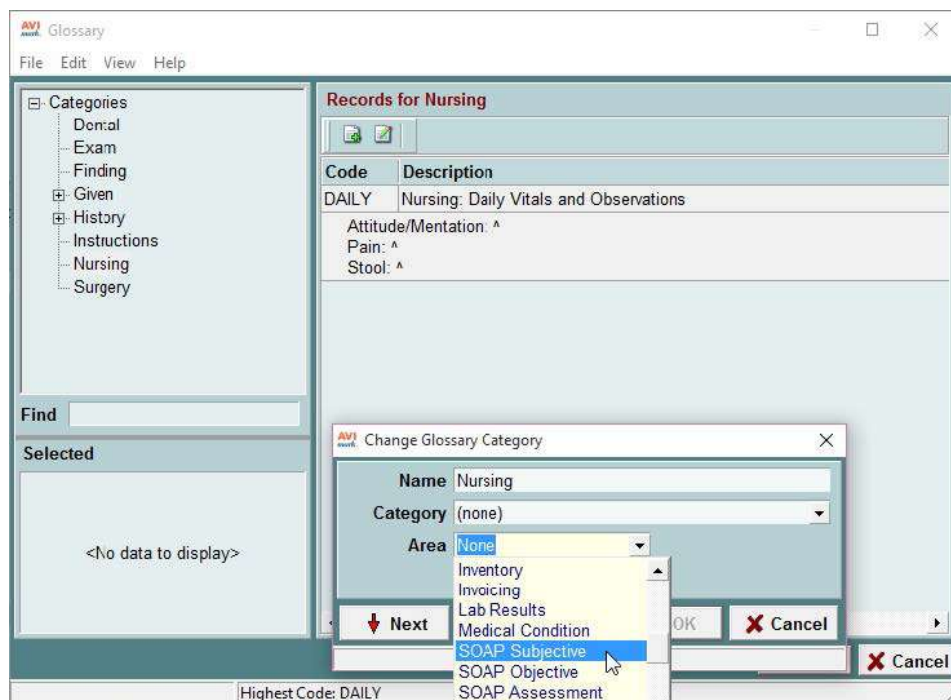
### Creating a sub-category

- To add a sub-category for the Note Glossary, **right-click** on a category and select **New (F2)**. Subcategories are beneficial to help sort the Note Glossary and find the template you are looking for.
- In the Category field, from the drop-down menu select the category this sub-category will belong to, e.g. Examination.



# Notes and Note Glossary

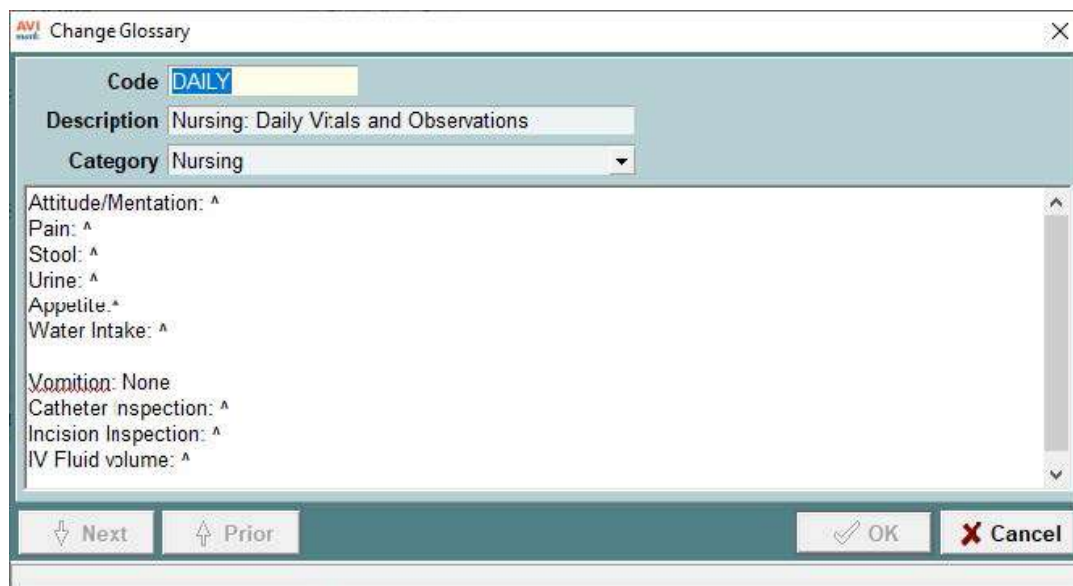
- In the Area field, from the drop-down menu select the appropriate area in AVImark where the Note templates will be used. When accessing the Glossary in the selected Area, the Note templates for this category will automatically be defaulted for selection, e.g. History.
- Select OK.



## Creating a Note template in Glossary

- Select the Category the template is associated with and in the Records for area **right-click | New (F2)**.
- In the New Glossary window, enter a Code and Description of the Note template.
- In the Category field, use the drop-down menu to specify which Category the Note template belongs to.
- In the Note box, enter the text of the Note template. The “^” symbol (**Shift + 6**) can be used for Notes that will need patient specific text added to the Note template. Where the “^” is placed is where the cursor will be displayed each time the **F12** function key is pressed. The patient or treatment information can then be entered.
- Select OK.

# Notes and Note Glossary



## Importing Note templates

From any Notes window a Note template can be imported.

### Manually importing Glossary Notes

- With the Notes window open, in the upper left hand corner select **Glossary | View Glossary (Shift F7)**.
- The Glossaries window will open allowing for selection.
- Find and select the Note template to import.
- By selecting **Done** the Note template will import into the Notes window.

### Auto-importing Glossary Notes

In the Note window the Code of the Note template can be entered and when pressing **Shift + Space**, the Note template will automatically import.

# Notes and Note Glossary

## Importing multiple Notes

- When creating a Note template it is a good idea to press Enter at the end of the Note text when multiple templates are selected to import. This will create a space between each template.
- When importing multiple Note templates from the Glossary, in the Selected window **right-click | Up (Control + Up)** and **Down (Control + Down)** to rearrange the templates to the desired order.
- A tool that can be accessed in the Note window is the Date-Time-Stamp feature (**Control + D**). This will log the date and time of the Note and the user's initials (who is logged into AVImark and entering the Notes) thus enhancing the Notes and providing good Medical Records.

## Creating a Note template from a Notes window

- Open a Notes window and enter the text for the template.
- The "^" symbol (**Shift + 6**) can be used for Notes that will need patient specific text added to the Note template. Where the "^" is placed is where the cursor will be displayed each time the F12 function key is pressed. After entering the text, highlight the text to be added to the template. Select Glossary | Add to Glossary (**Shift F7**) in the upper left hand corner.
- The New Glossary window will open where the Code and Description of the template can be entered. From the drop down menu select a Category for the template to be displayed in.
- Select **OK**.

# Notes and Note Glossary

## Notes

### Comments

Notes can be attached to treatments within the Change Treatment window through the Comments, Doctor's Notes and Doctor's Instructions on the General tab.



If the treatment contains the Q action code the Notes and Doctor's Instructions will not print on the Invoice.

- **Printing Comment Notes** — AVImark will print the Comments on the Invoice only if the option Include Comments on Invoice is checked in the Change Treatment window. The Comments will not print on the Patient Chart.

AVI  
mark  
Change - Canine DA2PP Vaccination

Treatment | Advanced | Contract Prices | Documents | Whiteboard | Laboratory | **Associated Entries** | Plan Entries | Ri

Code 406 Description Canine DA2PP Vaccination Charge 32.50  
Action Codes V Report Codes V List Codes Cost 0.000  
Discount Class 01 Appointment Time 0 min. Markup Percent 0  
Species 1 Canine Species 2 (none) Sex(es)  
Photo Abbreviation  
Form Invoice  
Journal Doctor (none)  
Change Patient Status None Category Vaccinations

Comments | Doctor's notes  
This vaccination contains immunities against Distemper, Adenovirus Type 2, Parvovirus and Para-Influenza.

**ATTACHMENTS**  
 Doctor's Instructions...  
 More Stuff...

Print comments on Invoice

Next Prior OK Cancel

Modified

- **Printing Doctor's Notes** — Doctor's Notes will print on the Invoice, only if the treatment has the % action code and once the Notes are in medical history the Public option will need to be checked. These Notes will print on the Patient Chart if the option to Include History Notes is checked and the treatment has the % action code.

# Notes and Note Glossary

- **Printing Doctor's Instructions** — Doctor's Instructions that are linked to a treatment will only print on the Invoice and not the Patient Chart.

## 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 unless you mark the public box within the Notes window. If you include the Doctor's Notes on the invoice they will also print directly under the service on the invoice.

- Access the Change Treatment window and enter the Notes to be included on the invoice within the Doctor's Notes area.

Change - Castration, Canine

Treatment | Advanced | Contract Prices | Documents | Whiteboard | Laboratory | Associated Entries | Plan Entries

Code 611 Description Castration, Canine Charge 71.00

Action Codes FX< Report Codes List Codes S Cost 0.000

Discount Class 01 Appointment Time 0 min. Markup Percent 0

Species 1 Canine Species 2 (none) Sex(es) M

Photo ... Abbreviation

Form ... Invoice

Journal ... Doctor (none)

Change Patient Status None Category Surgery

Comments | Doctor's notes

OPERATIVE REPORT:

Patient Preparation:  
The scrotal and prescrotal area was clipped using a #40 clipper blade. The site was surgically prepared with chlorhexidine scrub. A surgical drape was applied to the area.

Surgical Approach:  
A midline prescrotal incision was made in the skin with a #10 scalpel blade.

ATTACHMENTS

Doctor's Instru

More Stuff...

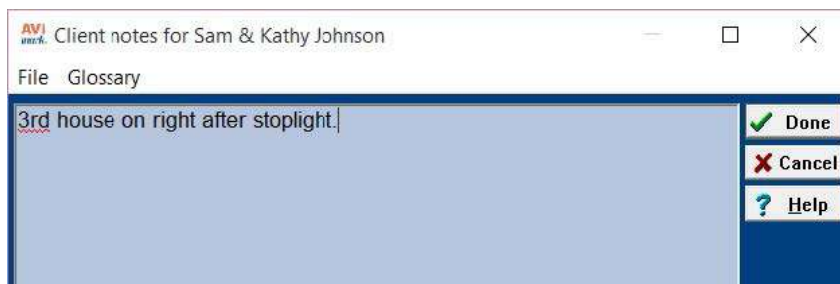
- Utilize the asterisk "\*" to open a Notes window with the instructions copied to allow for any minor changes to be made to the text.
- You can also use the caret "^" symbol in Notes where answers to questions will be listed where a staff member will have to work down the Notes window entering answers. This allows the staff member to use the **F12** function key to quickly advance the cursor to the next "^" caret symbol in the Notes window.

# Notes and Note Glossary

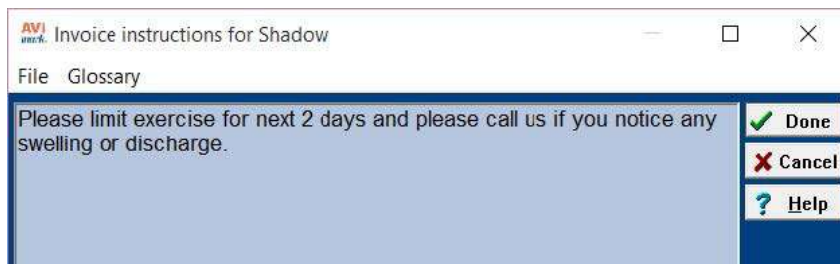
## Client & Patient Notes

Notes can be placed on the client or patient a few different ways, either by highlighting in the specific area, **right-click | Notes**, click on **Notes** under Attachments or press the **F5** button on the keyboard. There is also the ability to place Doctors Instructions by **right-click | Instructions** or pressing **Shift + F5**.

- **Printing Client and Patient Notes** — Client Notes will only print on the patient chart if the option to include Client Notes is checked. The client Notes will not print on the Invoice even if Public is checked.



- **Printing Clients and Patient Doctors Instructions** — Doctor Instructions placed on the client will only print on the next Invoice even if the Public option in the Notes window is unchecked. Instructions will not print on the patient chart.



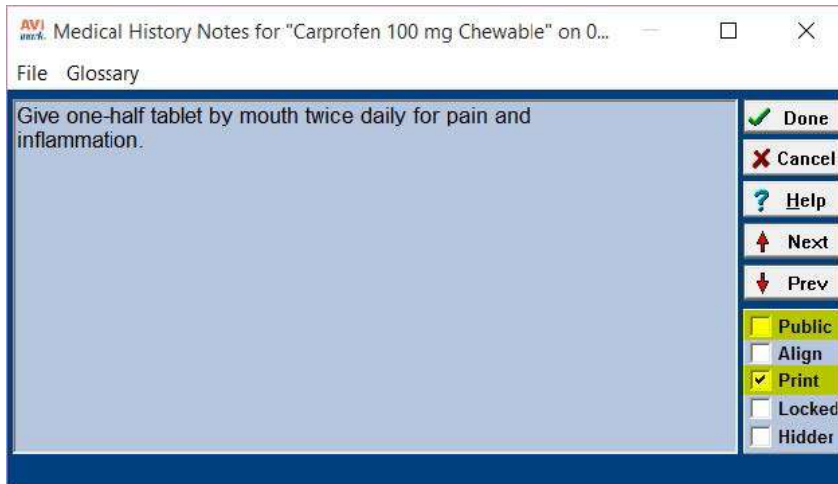
## Medical History Notes

AVImark allows Notes and Instructions to be placed on medical history entries. This can be done a few ways, by either highlighting the entry and **right-click | Notes**, click on Notes under Attachments or press the **F5** button on the keyboard. There is also the ability to place Doctors Instructions by **right-click | Instructions** or pressing **Shift + F5**.



# Notes and Note Glossary

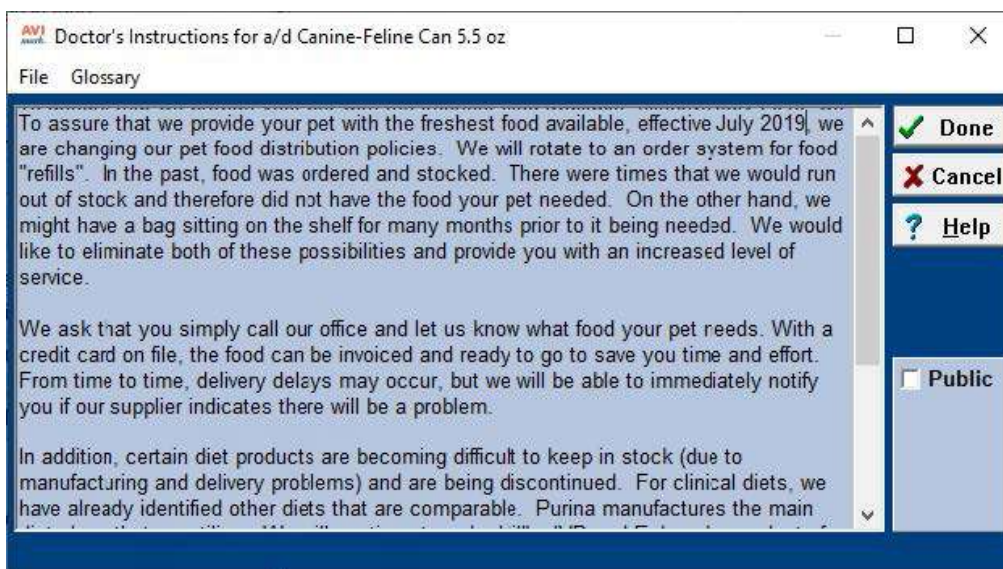
- **Printing Medical History Notes** — Notes will print on the patient chart if the Print option is checked in the Notes window, but will not print on the invoice; only if Public and Print options are checked will the Notes print on the invoice.



- **Printing Medical History Doctor Instructions** — Doctor Instructions will only print on the Invoice and not print on the patient chart.

## Inventory Notes

Notes can be attached to an Inventory item by **right-click | Notes or Instructions**.



# Notes and Note Glossary



If item contains the Q action code the Notes and Doctor's Instructions will not print on the invoice.

- **Printing Notes** — Notes attached to an item will print on the Invoice if the item has the % action code and the Public box is checked within the Notes. These Notes will print on the Patient Chart if the option to Include History Notes is checked.
- **Printing Doctor's Instructions** — Doctor's Instructions linked to an item will print on the Invoice, but will not print on the Patient Chart.

## Appointment Notes

There is the ability to place Note on the patient's appointment through the appointment window. This can be done by creating an appointment and in the Notes field type in your Notes, or **right-click** on the appointment and select **Notes (F5)**, or highlight the appointment and select the speed bar button.

Room	Room 1	Minutes	15
Client	Dial, Catherine	Phone	573 -555-0026
Patient	Bonnie	Species	Canine
Breed	Poodle, Toy	Weight	8.94 lbs
Type	(none)		

Notes...	Reminders...
Limping	12-06-19 Annual Physical Examination ^
	10-06-09 Heartworm Test
	12-06-19 Canine Bordetella Vaccination
	12-05-21 Canine Rabies Vaccination
	12-05-21 Canine DA2PP Vaccination v

Patient Name

- **Printing Appointment Notes before Check-in** — The Notes associated with the appointment will print on the Patient Chart under two conditions.
  1. The appointment is in the future and not on the date you are printing the Patient Chart for
  2. And the option to include Appointments is checked in the Patient Chart.

# Notes and Note Glossary

- **Printing Appointment Notes after Check-in** — The appointment Notes must import into the patient medical history; this can be done by opening the Options Maintenance window and Search for Post Appointment Notes to Medical History and click Change and set the Default Value to True. These Notes will print on the Patient Chart but will not show on the Invoice.

## Boarding Notes

Notes can be placed on a boarding reservation in the Boarding Calendar by highlighting the reservation and **right-click | Notes (F5)**, in the Reservation window click on Notes.

- **Printing Boarding Notes** — Boarding Notes will not print on the Invoice or the Patient Chart, but they will print on the Boarding Census through the Whiteboard.

<b>Date:</b> 05-04-18	<b>Loving Care Animal Hospital</b> BOARDING RESERVATIONS				<b>Page:</b> 1	
<b>Facility</b>	<b>Patient</b>	<b>Client</b>	<b>Phone</b>	<b>In Date</b>	<b>Out Date</b>	
HOSP1	Shadow Brought own blanket.	2 Johnson, Sam & Kathy	(573) 555-0054	04-23-18	04-24-18	

## Accounting Notes

In the Accounting window AVImark has the ability to attach a Note by highlighting the entry and rightclick, Notes (F5).

- **Printing Accounting Notes** — If the Public option IS checked in the Accounting Transaction Notes window, these Notes will print with the Account History report regardless of whether or not the Public option is checked in the Print Account History window. These Notes will also print on the Statement or that client when the Public box is checked in the Notes window. If the Public option in the accounting transaction Notes window is NOT checked, these Notes will print on the Account History report if the Public option in the Print Account History window is also not checked. If you check the Public option in the Print Account History window, these Notes will NOT print on the Account History report.

# Notes and Note Glossary



## Hiding Notes & showing specific Notes on CID

There are several views for medical history Notes. To access these options right-click | Notes within Medical History to see the options.

- **Show All** — Displays all public and non-public Notes on the CID.
- **Show All but Rx** — This option will display all Notes on the CID except for drug label instructions.
- **Public Only** — Use the public checkbox in medical history Notes window to display the Notes directly on the screen with this option selected.
- **Show None** — This option will hide all Notes in medical history so they cannot be viewed on the CID.
- **Show all with Note Action** — Use the 2 action code on treatments, items, diagnoses and/or problems in conjunction with this medical history Note option to only display Notes attached to those defined line items.



# Medical Condition Record — Basic

# Medical Condition Record — Basic

The Medical Condition Record is a comprehensive health record of a patient's visit. This area is divided into seven separate sections; six of these sections can be expanded or collapsed allowing you to view only the area needed at that time.

The AVImark SOAP window is divided into seven separate sections. These sections include:

The screenshot shows the AVImark SOAP window for a patient named Flash (Canine, N, 12m, 0.00) on 05-29-19. The window is titled "Medical Condition 01 - Flash (Canine, N, 12m, 0.00), on 05-29-19" and has a menu bar with "Med Condition" and "Import SOAP".

The main area contains the following fields and sections:

- Vital Signs:** Weight 0.00 lbs, Temp 0.00 °F, Heart Rate 0.00 /min, Resp 0.00 /min, CRT sec, BCS 0.00 of 0.00, Other of , Pain Scale 0.
- Admitted By:** DNS: David N. Sharp, DVM
- Post For:** DNS: David N. Sharp, DVM
- Vitals Only:**
- Problems:** (Expandable section)
- Subjective:** JAK: 06-17-19 at 9:51a. Attitude/Mentation: Pain: Stool: Urine: Appetite: Water Intake: Vomition: Catheter Inspection:  Check All  Uncheck All
- Objective:**

<input type="checkbox"/> Appearance		<input type="checkbox"/> Oral	
<input type="checkbox"/> Mentation		<input type="checkbox"/> Trunk / Limbs	
<input type="checkbox"/> Posture / Gait		<input type="checkbox"/> Heart / Lungs	
<input type="checkbox"/> Hydration		<input type="checkbox"/> Abdomen	
<input type="checkbox"/> Head / Neck		<input type="checkbox"/> Genitalia	

The bottom of the window has a toolbar with buttons:  Preview,  Report Card,  Lock,  ,  Done,  Cancel, .

- **Vital Signs** – Enter the patient's current vital signs at the time of examination.
- **Problems** – Select one or more problems associated with this visit. The problem history area displays current and past problems for the patient.
- **Subjective** – Record the client communications about the patient's condition.
- **Objective** – Record physical exam findings.
- **Assessment** – Record possible diagnoses (rule-outs) and final diagnosis.
- **Plan** – Record treatments and/or items used in diagnosing the problem and entries used for treating the final diagnosis.

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- **Attachments** – This area mirrors the medical history attachment window. If files have been attached to the selected history entry they will be displayed in this area. Attachments may also be added within this area as you would in medical history.

## Opening a Medical Condition Record

This window can be opened both manually and automatic.

### Manually

- Highlight the medical history entry that you would like to attach the Medical Condition Record to and **right-click | Med Condition**.
- Click on **Medical Condition** under Attachment on the right-hand side of the medical history.



### Automatic

There are two ways AVImark can automatically open the medical condition record.

1. For the **first method** there are **three options** you will need to set in the Advanced Options of Hospital Setup if you want to turn on this automatic Vitals Window feature.
  - Under Check-in Process, the first option you will need to set is *Create medical condition record?* This must either be set to **Yes** or **Prompt**. If you set it to Prompt, and you do want to open the window upon a check-in of a patient; you must click Yes when the message appears asking if you want to create the medical condition record. If you set the default to **NO** or click NO when the message appears, it will not create the MCR.

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- The second option you must set is the *Post Visit to Medical History* option. This must be set to **True**. If you set it to **False**, there will not be a **VISIT** code posted to medical history for the SOAP record to be attached to, thus causing it to not open.
- The third option, under Check-in Process, Medical Condition Record is **Show Medical Condition Record**. This option is the equivalent of the Use Soap option under Other Options on the Miscellaneous Tab of Hospital Setup. This option must be set to **True**, otherwise the MCR will not open upon a check-in. Otherwise, they could still manually open a MCR on a treatment if this option is set to **False**.



However, if this option is set to True, they will receive the error: *Sorry, can't post from Med Condition if patient not checked in, if they try to post a service from the Plan Tab without checking in the patient first. They can only post to medical history from the Plan Tab without first checking in the patient when this option is set to False .*

2. For the **second method** place the **W** action code on a treatment which will allow AVImark to automatically generate the medical condition record when this treatment is placed into medical history.

## Using the Medical Condition Record

### Step 1: Entering vital signs

AVImark Medical Condition 02 - Flash (Canine, M, 12m, 15.00), cn 06-17-19

Med Condition Import SOAP

Weight 15.00 lbs Temp 100.70 °F Heart Rate 144.00 /min Resp 20.00 /min CRT <2 sec  
BCS 4.00 of 9.00 Other pale of mm color Pain Scale 0  
Admitted By MW: Melissa Waters Post For DNS: David N. Sharp, DVM  Vitals Only

Preview Report Card Lock Prev Next Done Cancel Help

- **Weight** – This is the area where you would need to enter the patient's current weight. If you would like AVImark to track a patient's weight history, the weight must be entered within this field at all times. Holding your cursor over the weight field will display a window with the entire weight history of the selected patient.
- **Temp** – Within this area you will enter the patient's current temperature. This value can



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be entered in either Fahrenheit or Celsius. This option is determined within the Advanced options within Hospital Setup.

- **Heart Rate**
- **Respiratory Rate**
- **CRT (Capillary Refill Time)**
- **BCS (Body Condition Score)** – The ratings in these fields are strictly user defined, within Hospital Setup, and can be graphed in the Medical Condition record by using the (Menu) Med Condition, Graph Values. Each time a new Medical Condition record is created for a patient, the BCS fields will default to being blank.
- **Other** – The ratings in these fields are strictly user defined, within Hospital Setup, and can be graphed by using the Graph Values option in the Medical Condition Menu. Each time a new Medical Condition record is created for a patient, the Other fields will default to being blank. An example for the use of this field is recording mucous membrane color.
- **Pain Scale** – The Pain Scale amount will be printed on the SOAP record, the Patient Chart and Report Card. To show on the Report Card you must use the merge word <soap-painscale>.
- **Admitted By** – This field will default to containing the doctor assigned to the patient's check-in.
- **Post For** – The client's preferred doctor on the client will automatically be assigned as the Post For doctor when the SOAP record is opened. If you create a SOAP record on a client account that does not have a preferred doctor the Post For field will default to (none). Once you select a Post For doctor, this doctor will be retained on this SOAP record and will be the doctor listed on all entries that are posted into medical history from the SOAP record.
- **Vitals Only** – There is a new Vitals Only check box in the vitals area of the SOAP window. With this option checked, only the top section of the SOAP window will be displayed and only the vitals signs will print on the patient chart. There is also an advanced option, **Only Show Vitals Section of the Medical Condition Window By Default**. For practices that want to use the abbreviated version each time the Medical Condition Record is opened, this option will need to be changed to **True**.

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## Step 2: Select Presenting Problems

Choose the Problem(s) by one of the following methods:

- Click in the **Presenting Problem** field and type part of the description. It acts as a find field and will display a drop-down list to choose from.
- Click in the Presenting Problem field, **right-click | Choose Problem (F7)**. This will take you to the Problem.

Code	Description
DRM02	Alopecia
PD6996	Diarrhea
BHV18	Lethargic
PE7970	Vomiting

- List where you will select the Problem(s) and click **Done**.
- You will be prompted to **Post 'Problem' to this Patient's Medical History?**. This will open the problem in the patient's Problem History. Click Yes on the prompt. (If you selected more than one problem, additional prompts will appear). This problem will then show in the patient's Problem History list and you may select it again in the Enter Medical History if you see the patient for the same problem.

Confirm

Post "Hypersalivation" to this patient's Medical History?

Yes No

## Step 3: Subjective Area

Enter notes about the initial communication with the client pertaining to the condition of the patient and general findings.

Subjective

JAK: 06-17-19 at 4:07p:  
Attitude/Mentation: Depressed  
Pain: None  
Stool: Diarrhea for 3 days  
Urine: Decreased  
Appetite: None for 3 days  
Water Intake: Decreased  
Vomition: 3+ times/day  
Client Notes: Started losing appetite over weekend but was still playful. Began having loose stools and vomiting Sunday evening. Owner noticed strange odor from stools, and hair loss around eyes, same day

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The Chief complaint and client communications area of the Subjective Area on the Medical Condition Record will have all of the right-click options that are available in all Notes windows in the AVImark program.



**Minimize and Maximize** – The Subjective, Objective, Assessment, Plan tabs and the Client Instructions area now have a maximize [+] and minimize [-] button in the upper right hand corner to expand or collapse the viewing size of each note window. Clicking the expand button will cause the associated notes window to expand vertically one line.

## Step 4: Objective Area

The Objective Area is used for indicating specific abnormalities the patient has based on direct examination. Within the Objective section you will see a list of Abnormality check boxes that correspond to the Abnormality table entries defined within System Tables. When any of these boxes are checked, a window will open to enter associated notes, as well as the check boxes for any body subsystem that you have defined for this abnormality.

The screenshot shows the 'Objective' section of the software interface. At the top, there is a header 'Objective' with a green arrow icon. Below it is a text field containing 'JAK: 06-18-19 at 8:19a'. To the right of this field are maximize (+) and minimize (-) buttons. Below the text field are two buttons: 'Check All' (with a green checkmark icon) and 'Uncheck All' (with a grey square icon). The main area contains a grid of checkboxes and text input fields for various body systems:

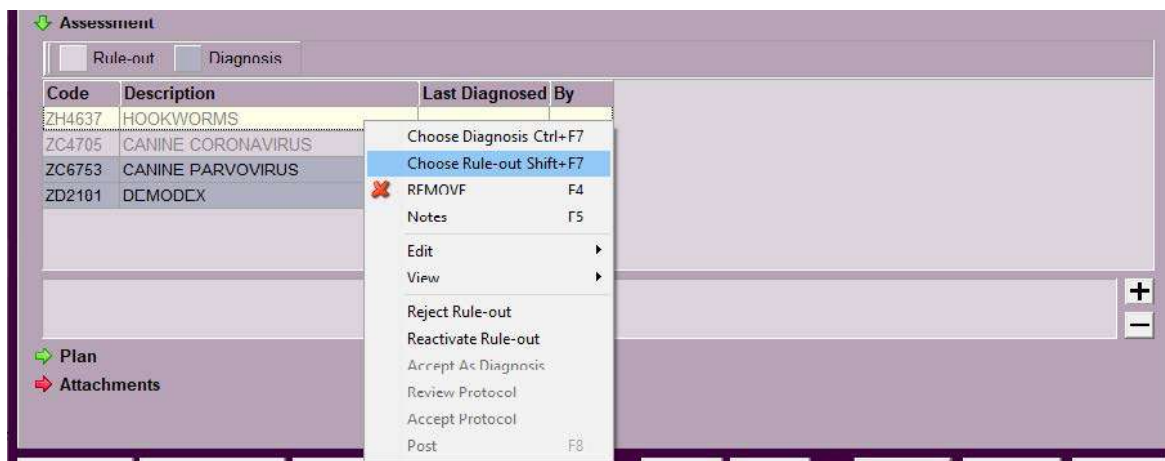
<input checked="" type="checkbox"/> Appearance	Emaciated	<input checked="" type="checkbox"/> Oral	Ptyalism
<input checked="" type="checkbox"/> Mentation	Depressed	<input checked="" type="checkbox"/> Trunk / Limbs	Haircoat dull, OU alopecia
<input checked="" type="checkbox"/> Posture / Gait	Normal	<input checked="" type="checkbox"/> Heart / Lungs	Normal
<input checked="" type="checkbox"/> Hydration	Dehydrated - 8%	<input checked="" type="checkbox"/> Abdomen	Normal
<input checked="" type="checkbox"/> Head / Neck	Eyes glazed	<input checked="" type="checkbox"/> Genitalia	Normal

- **Entering Abnormality Notes** – A single text line is available for entry and the viewing of notes for each abnormality. A smaller note window will now open when an abnormality box is checked or with a single left-click in the abnormality note field.

## Step 5: Choosing Rule-Outs

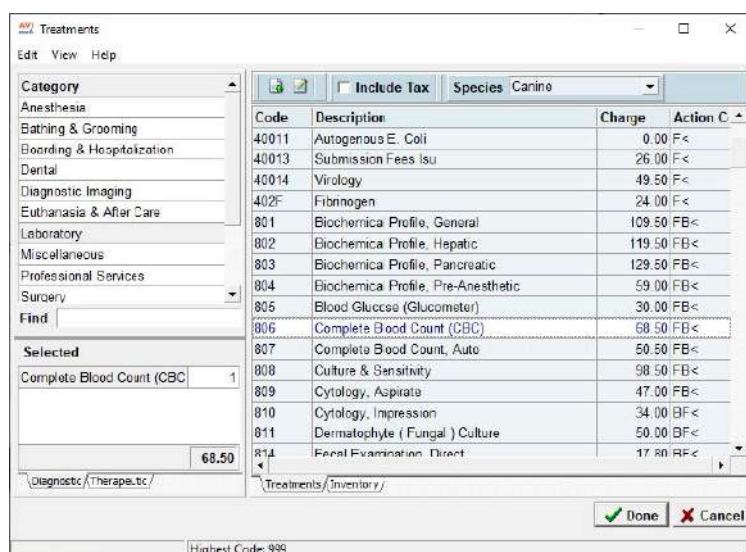
- **Right-click | Choose Rule-out** from the Assessment area
- Select the Probable Diagnoses from the diagnosis list with a simple mouse click, then click **Done**.

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## Step 6: Choosing Diagnostic/Therapeutic Protocols

- Right click **Choose Entry** from the Plan area.
- This will open a tabbed window allowing you to specify the treatments and/or items used as Diagnostic or Therapeutic Protocols.
- By selecting on the Diagnostic tab to the left will allow entry of Diagnostic Protocols or by clicking on the Therapeutic tab to the left will allow you to enter the Therapeutic protocols. You have the option of Basic Medical Condition Record either choosing the inventory or treatments tab.
- Select the entries with a **left-click**, then press the **space bar**.
- This will in turn add the entries to the selected area.
- Click **Done** and the entries will be added to the Plan area of the Medical Condition Record.
- Once these are performed **right-click | Post** to add these entries to the patients medical history.



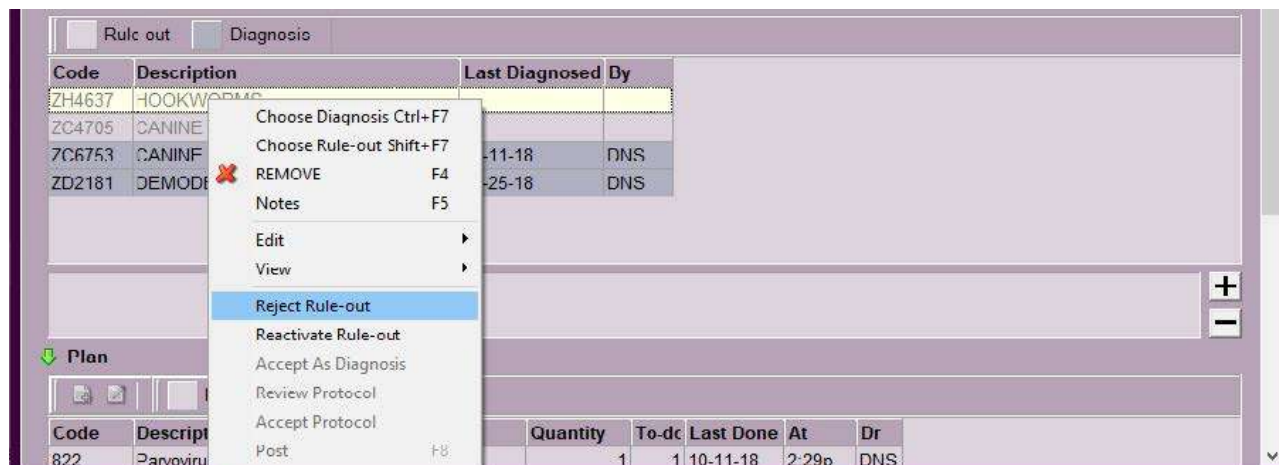
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## Step 7: Rejecting Rule-Outs/Accepting a diagnosis

As treatments/items are performed/dispensed from the diagnostic protocol section; rule-outs will need to be rejected as a diagnosis and the final diagnosis will need to be accepted.

### Eliminating Rule-Outs

- Right-click on the rule-out to be eliminated within the Assessment section and select **Reject Rule-out**.

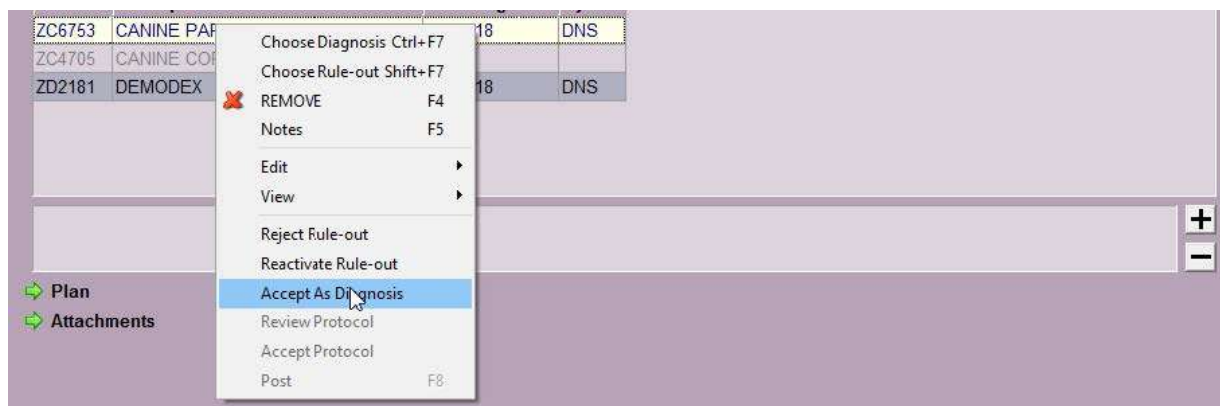


- Once a diagnosis has been rejected it will be displayed in a light violet color, to re-activate a rejected entry select the appropriate rule-out and **right-click | Reactivate Rule-out**. Rule-out notes can also be added to the entry by **right-click | Rule-out notes**. This window can contain information on why the diagnosis was rejected.

### Accepting a final diagnosis

When a final diagnosis has been determined it will need to be indicated as so.

- **Right-click** on the diagnosis and select **Accept as Diagnosis**. The action will need to be confirmed and the final diagnosis will appear in a dark violet color services.



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## The End Result

After the patient has been examined and a plan has been established you will notice entries entered within the patient’s medical record representing each step:

Medical History											
	Date	Time	Dr.	Type	Code	Description	Qty	Amount	By	Photo	Public?
1.	06-18-19	8:32a	DNS	I	7310	Ampicillin Na 100 mg/mL	1	2.49	JAK		Yes
	06-18-19	8:32a	DNS	I (i)	5010	Metronidazole Benz. 100 mg/mL	1	16.69	JAK		Yes
2.	06-18-19	8:32a	DNS	I	1063	Lactated Ringers 1L	1	28.88	JAK		Yes
	06-18-19	8:31a	DNS	T	CER	Cerenia Injection	1	45.00	JAK		Yes
3.	06-18-19	8:31a	DNS	T	142	Catheterization, Intravenous	1	49.00	JAK		Yes
	06-18-19	8:29a	DNS	D	ZC6753	CANINE PARVOVIRUS	1	0.00	JAK		Yes
4.	06-18-19	8:29a	DNS	T (a)	806	Complete Blood Count (CBC)	1	68.50	JAK		Yes
	06-18-19	8:29a	DNS	T (a)	822	Parvovirus Test, Snap ELISA	1	61.50	JAK		Yes
5.	06-18-19	8:29a	DNS	T (a)	815	Fecal Examination, Flotation	1	28.50	JAK		Yes
	06-18-19	8:29a	DNS	D	ZD2181	DEMODEX	1	0.00	JAK		Yes
6.	06-18-19	8:28a	DNS	T (a)	824	Skin Scraping	1	36.00	JAK		Yes
	06-18-19	8:28a	DNS	T	202	Annual Physical Examination	1	60.00	JAK		Yes
7.	06-17-19	4:07p	DNS	P	ORL08	Hypersalivation	1	0.00	JAK		Yes
	06-17-19	4:05p	DNS	P	PE7970	Vomiting	1	0.00	JAK		Yes
	06-17-19	4:05p	DNS	P	PD6996	Diarrhea	1	0.00	JAK		Yes
	06-17-19	4:05p	DNS	P	BHV18	Lethargic	1	0.00	JAK		Yes
	06-17-19	4:04p	DNS	P	DRM02	Alopecia	1	0.00	JAK		Yes
	06-17-19	10:08a	DNS	V (nm)	VI\$IT	Patient check-in			JAK		Yes

1. Treatment Protocol
2. Diagnosis
3. Diagnostic Protocol
4. Diagnosis
5. Diagnostic Protocol
6. Presenting Problems
7. Check-in Marker (Vitals, Client Communications & Physical Exam Findings)



# Medical Condition Record — Advanced

# Medical Condition Record — Advanced

## Customizing the SOAP Record

### Customizing Objective Abnormalities

#### Defining abnormalities

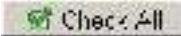
The Abnormalities Table allows you to specify your own list of physical and physiological problem areas which you will use to describe and define a patient's condition. These abnormalities are considered "Body Systems" and automatically appear in the Objective Folder of a patient's Medical Condition window.

When defining the abnormalities table:

- From the **CID**, click on **Work with | System Tables** and click on the **Abnormalities Table**.
- To add an abnormality, move the mouse pointer into the Entries for Abnormalities Table window, then choose **right-click | New** (or click the Paper speedbar button) to open the New Entry window.
- Enter a **Code** and **Description** of the abnormality and click **OK**. Each code must be unique (not the same as any other abnormality, breed, color, allergy, or other codes used in System Tables).

Within System Tables you have the option of entering default text when the abnormality is examined with no abnormalities seen or if the abnormality was not examined at all. This information will be saved and printed along with the other observations and memos on the Medical Condition chart and the Patient chart.

Toolbar buttons available within the Objective area are used for checking all Abnormalities or clearing all checks, this is used as a time saving tool. Right-click options available within the text fields are identical to any notes window within AVImark.

 This option will enter check marks in all abnormality areas indicating that they were all examined and all normal.

<input checked="" type="checkbox"/> <b>Eyes, Ears, Nose,</b>	Normal -	<input checked="" type="checkbox"/> <b>Urinary</b>	Normal -
<input checked="" type="checkbox"/> <b>Integument</b>	Normal -	<input checked="" type="checkbox"/> <b>Genital</b>	Normal -
<input checked="" type="checkbox"/> <b>Musculoskeletal</b>	Normal -	<input checked="" type="checkbox"/> <b>Neurologic</b>	Normal -
<input checked="" type="checkbox"/> <b>Cardiovascular</b>	Normal -	<input checked="" type="checkbox"/> <b>Lymphatic</b>	Normal -
<input checked="" type="checkbox"/> <b>Respiratory</b>	Normal -	<input checked="" type="checkbox"/> <b>Other</b>	Normal -
<input checked="" type="checkbox"/> <b>Digestive</b>	Normal -	<input checked="" type="checkbox"/> <b>General</b>	Normal -



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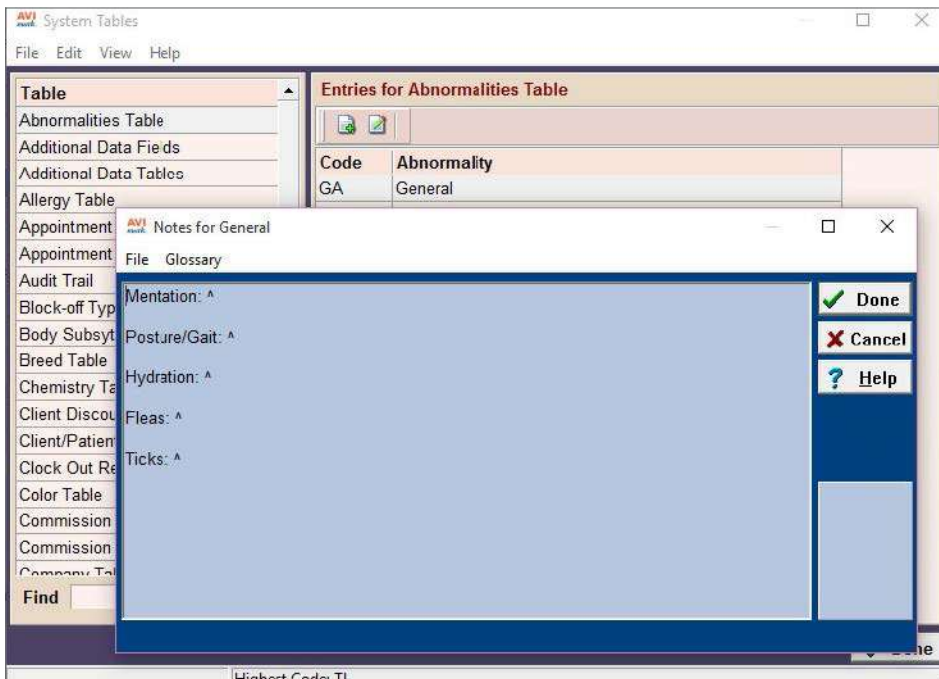
**Unc ~~rec~~ < A** This option will remove check marks from all abnormalities indicating that they were all not examined.

<input type="checkbox"/> <b>Eyes, Ears, Nose,</b>	- Not Examined -	<input type="checkbox"/> <b>Urinary</b>	- Not Examined -
<input type="checkbox"/> <b>Integument</b>	- Not Examined -	<input type="checkbox"/> <b>Genital</b>	- Not Examined -
<input type="checkbox"/> <b>Musculoskeletal</b>	- Not Examined -	<input type="checkbox"/> <b>Neurologic</b>	- Not Examined -
<input type="checkbox"/> <b>Cardiovascular</b>	- Not Examined -	<input type="checkbox"/> <b>Lymphatic</b>	- Not Examined -
<input type="checkbox"/> <b>Respiratory</b>	- Not Examined -	<input type="checkbox"/> <b>Other</b>	- Not Examined -
<input type="checkbox"/> <b>Digestive</b>	- Not Examined -	<input type="checkbox"/> <b>General</b>	- Not Examined -

## Default abnormality templates

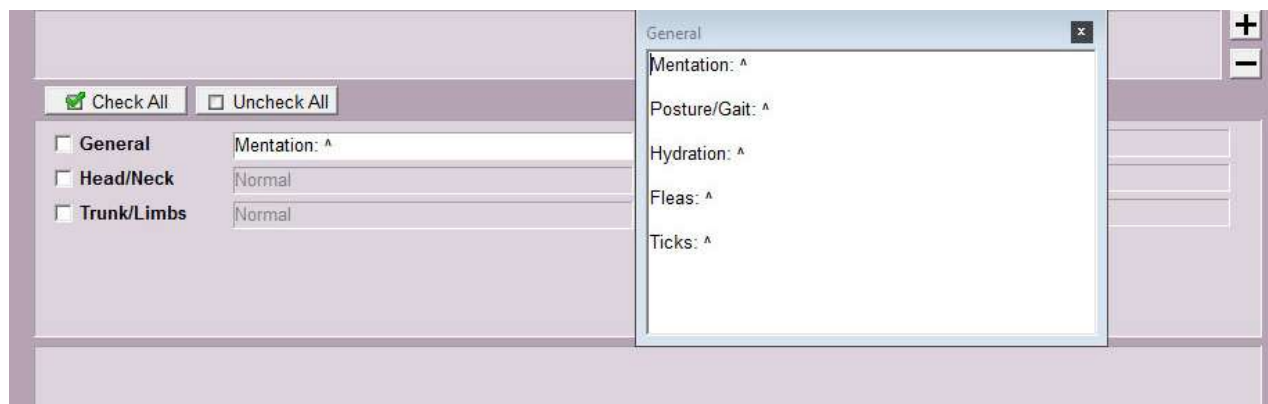
Default notes can be set on each abnormality and pulled into the notes window for that specific abnormality.

- From Hospital Advanced Options search for **Copy Abnormality Notes to MCR** and set the Default Value to **True**.
- In System Tables select the Abnormality table and on the desired entry choose **right-click | Notes** to enter the desired text or template.



# Medical Condition Record — Advanced

- Then create a Medical Condition Record and in the Objective area click on the appropriate abnormality with the attached notes.
- The notes will copy over and appear in the displayed note window. **Right-click** options available within the text fields are identical to any notes window within AVImark.



## Defining Body Subsystems

Body Subsystems are parts of the abnormality area that are created to speed up the process of recording medical notes in the Medical Condition Record window.

When defining the Body Subsystems table:

- From the CID, click on **Work with | System Tables** and click on the **Body Subsystems Table** line of the System Tables window.
- To add a subsystem, move the mouse pointer into the Entries for Body Subsystems Table window, then choose **right-click | New (or click the Paper speed bar button)** to open the New Entry window.
- Enter a **Code** and **Description** of the subsystem and click **OK**. Each code must be unique (not the same as any other abnormality, breed, color, allergy, or other codes used in System Tables).

# Medical Condition Record — Advanced



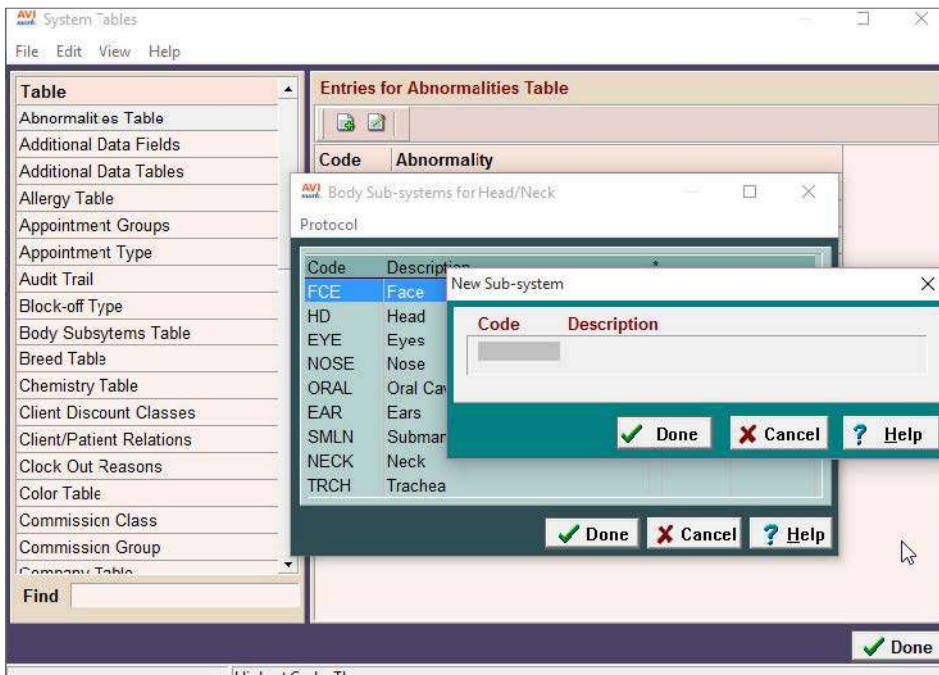
## Associating Body Sub-Systems to abnormalities

Once these sub-systems are created, you can create an association between the sub-system and the abnormality it is part of.

To create the association between the sub-system and the abnormality:

- Click on the appropriate abnormality (body system) you wish to associate the sub-system to in the Entries for Abnormalities Table.
- **Right-click | Sub-systems** from within the Abnormalities Table.
- Select the **New** option. The New Sub-system window will open with blank fields for you to define the new sub-system.
- Enter the Code corresponding to the sub-system you want to associate with the abnormality in the **Code** field.
- Click the **Done** button to close the window and save the new sub-system to the list.

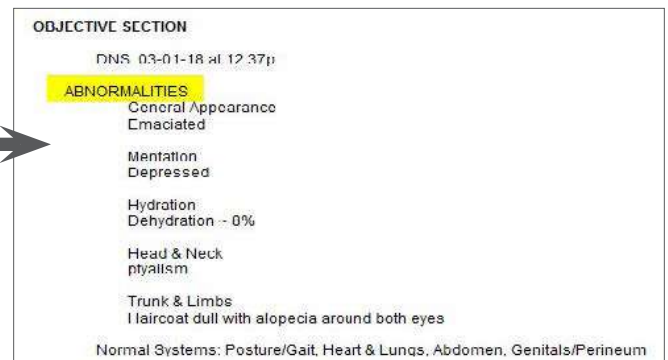
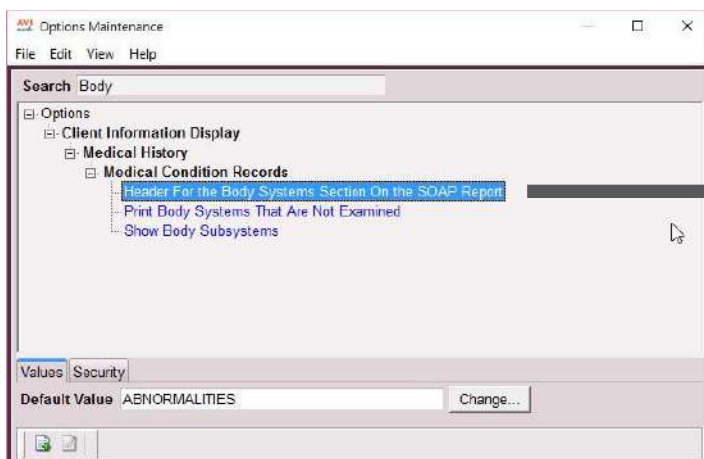
# Medical Condition Record — Advanced



## Customizing the Abnormality heading

Each clinic can now customize the terminology of “Abnormalities” as it is used on the Patient Chart and SOAP print out. According to your own preference this is done by setting up a user-defined term to replace Abnormalities.

- In the **Options Maintenance Search** window Search for *Header for the Body Systems Section on the SOAP Report*.
- Highlight this option and then click on the **Change** button to open the **Change Option** window to enter the description you wish to use.



# Medical Condition Record — Advanced

## Pre-defining Medical Condition Record Protocols

Medical Condition Record Protocols allow you to create pre-defined services and items that need to be performed for the presenting problems and the final diagnosis. These protocols can be set up to be completely automated meaning it will import pre-defined rule-outs, diagnostic protocols, treatment protocols, and additional recommendations.



### Creating pre-defined Rule-Outs

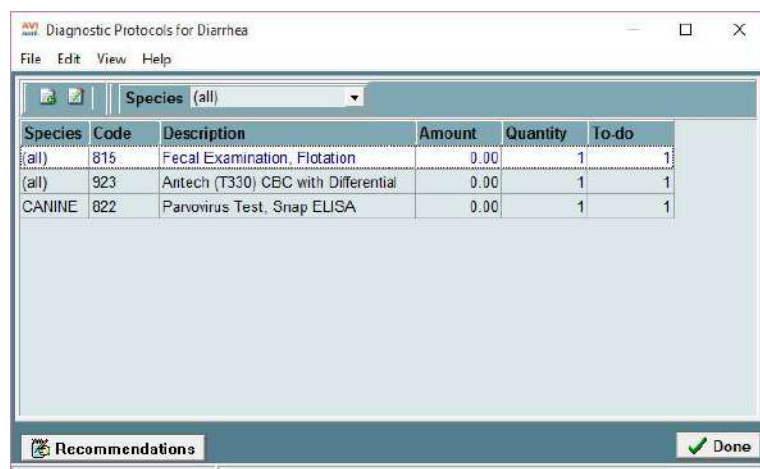
Rule-Outs are possible diagnoses for the problem and are also linked to problems within the Problem List.

- To link these possible diagnoses to this problem, highlight the problem, **right-click | Rule-Outs**.
- In the Rule-Outs window **right-click | New** or **Choose** to select possible diagnosis for the problem.
- Select the appropriate Species for the Rule-Out. This information will be permanently linked to the selected problem. When working in the Medical Condition Record, the Rule-outs will display for the appropriate species.

# Medical Condition Record — Advanced

## Creating pre-defined 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 or Items from the treatment or inventory list. These protocols can be accessed from the Medical Condition Record or from the patient's Problem History window.



- To permanently link a Diagnostic Protocol to a problem, highlight the problem, **right-click | Diagnostic protocol**.
- From within the Diagnostic Protocol window, **right-click** and choose **Treatments or Inventory items** that will be linked to this problem.
- Select the appropriate entries and click **Done**.

When working in the Medical Condition Record and viewing the Diagnostic Protocol for the Problem, AVImark will display the appropriate protocol for the species you are working with. From the **Species** drop-down menu, specify the Species the protocol is appropriate for.

- If the protocol is appropriate for multiple species, you will need to add the entry again for each species. To copy and paste protocols already defined for one species to another species, select the protocol, **right-click | Copy** and **Paste**.
- If unique species protocols are only necessary for a few of the species, it is not necessary to duplicate a list of protocols for all the remaining species. By selecting the Species '**All**', AVImark will allow these treatments or items to serve as the protocols for all other species that do not have unique protocols already defined.

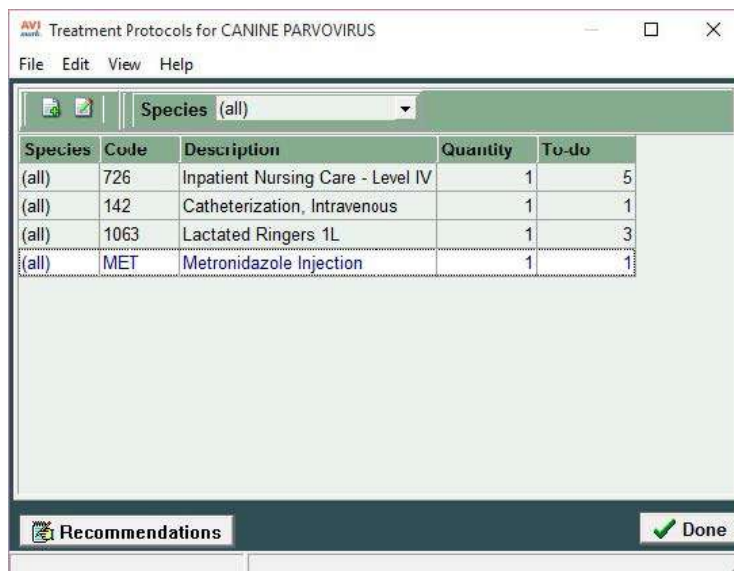
# Medical Condition Record — Advanced

## Creating pre-defined Treatment Protocols

A Treatment Protocol is the treatments or items used to treat the diagnosis. These Treatment Protocols are selected from within the Treatment and Inventory Lists and are linked to the diagnoses.

- To pre-define these, so they will be permanently linked to your diagnosis, highlight the diagnosis, **right-click | Treatment protocol**.

These Treatment Protocols are utilized in the Medical Condition Record. When working in the Medical Condition Record and accepting the Treatment Protocol, only the Treatments/Items for the Species you are working with will be displayed.



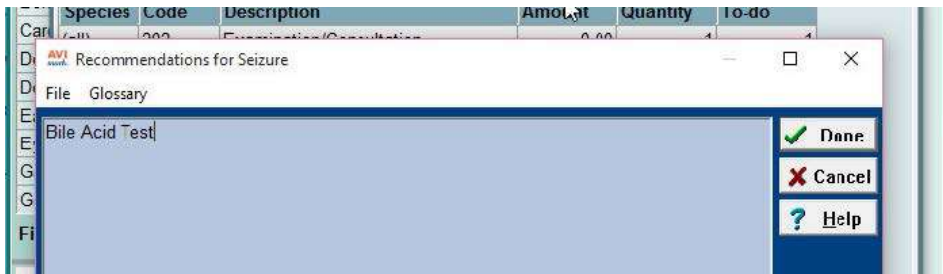
Species	Code	Description	Quantity	To-do
(all)	726	Inpatient Nursing Care - Level IV	1	5
(all)	142	Catheterization, Intravenous	1	1
(all)	1063	Lactated Ringers 1L	1	3
(all)	MET	Metronidazole Injection	1	1

## Recommendations

Recommendations can be entered for a diagnosis or problems. This will allow the user to view the recommendations while working in the Medical Condition Record.

- In the Diagnosis List, select the diagnosis and **right-click | Recommendations**. Enter the appropriate text.
- If you are in the Problem List, first access the Diagnosis Protocol window or Rule-out window | the **Recommendations** button.

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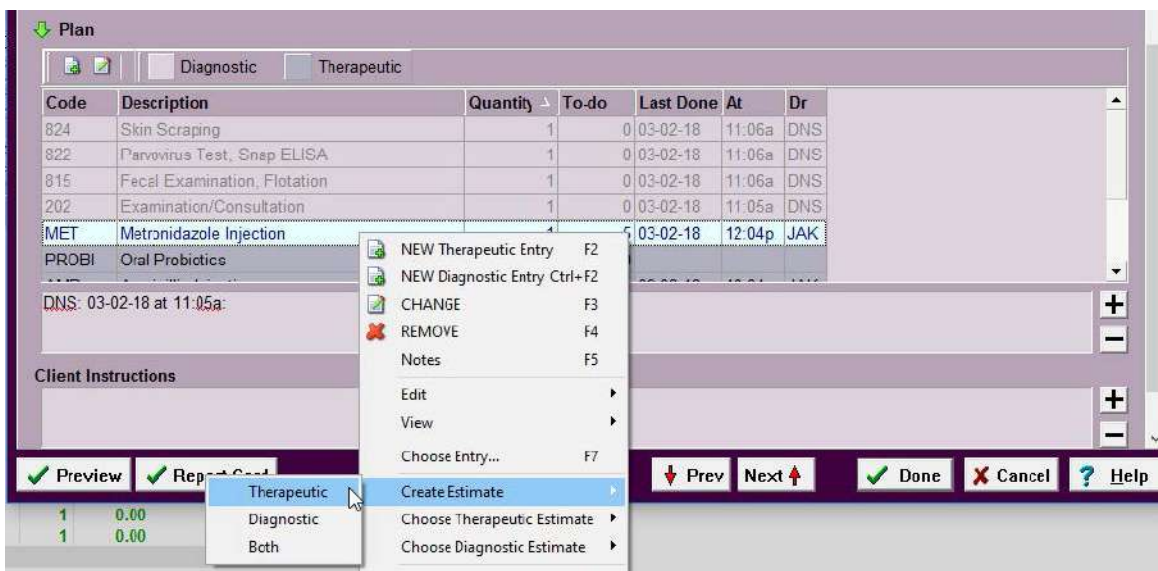


- When working in the Medical Condition Record, the recommendations for the diagnosis and problems window can be accessed in the Problem or Assessment area with a **right-click | Review Protocol or Review Rule-out** option.

## Creating Estimates from Protocols

From within the Medical Condition Record you have the ability to also create an estimate from the Diagnostic and/or Treatment Protocols listed in the Plan Area.

- **Right-click | Create Estimate** then click either Therapeutic (to select only the Therapeutic services/items), Diagnostic (to select only diagnostic services/items) or both (this will include all services/items within the Plan area whether it is diagnostic or therapeutic).
- You will need to click **Yes** to confirm and display the Estimate Detail window.
- To select additional treatments, items, diagnoses and/or add canned estimates from the Estimate Detail window, **right-click | Treatment, Item, Diagnosis, Problems and/or Estimate**.



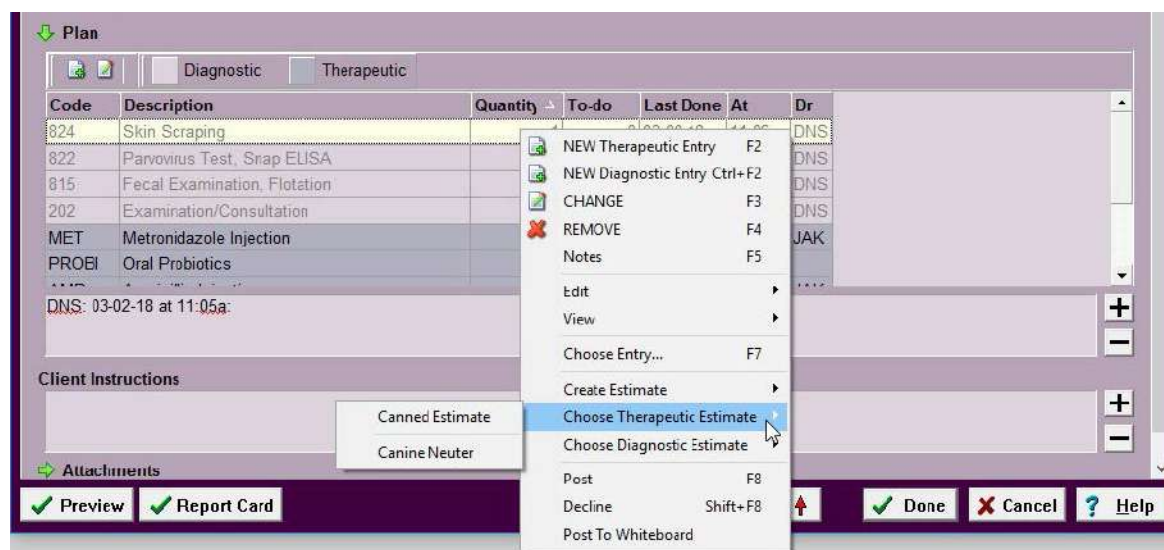


# Medical Condition Record — Advanced

## Creating Protocols from Estimates

Treatment and Diagnostic Protocols can also be generated from patient specific estimates, on the selected patient, and also Canned Estimates.

- From within the Plan area of the correct patient's Medical Condition Record, **right-click | Choose Therapeutic Estimate or Choose Diagnostic Estimate.**
- Select if you would like to access the Canned Estimate window to select an estimate or choose one of the previously linked estimates to this patient. All past linked estimates will display this includes past posted and declined estimates as well.
- After selecting the appropriate estimate AVImark will expand the entries within the Plan area ready to be performed and posted to medical history.



# Medical Condition Record — Advanced

## Advanced Usage of the Medical Condition Record

### Step 1: Vitals - Vital Signs (Veterinarian/Technician)

Med Condition

Weight 15.00 lbs Temp 100.70 °F Heart Rate 144.00 /min Resp 20.00 /min CRT <2 sec

BCS 4.00 of 9.00 Other pale of MM Color Pain Scale 0

Admitted By JAK: Jessica Krueger, RVT Post For DNS: David N. Sharp, DVM Vitals Only

Preview Report Card Prev Next Done Cancel Help

### Step 2: Problems - Presenting problems (Reception/Technician)

Problems

Presenting problem(s) hypersa Problem History

Code	Description
DRM02	Alopecia
BHV18	Lethargic
PD6996	Diarrhea
PE7970	Vomiting

Select from the following list...  
Hypersalivation

### Step 3: Subjective - Client communications (Reception/Technician)

Subjective

JAK: 03-01-18 at 12:24p

Attitude/Mentation: Depressed

Pain: None

Stool: Diarrhea for 3 days

Urine: Decreased

Appetite: None for 3 days

Water Intake: Decreased

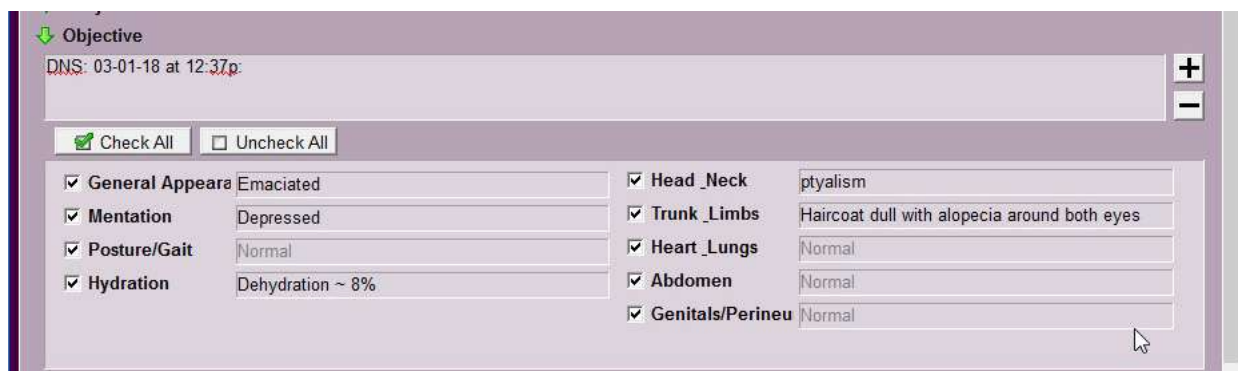
Client Notes: Started losing appetite over weekend but was still playful. Began having loose stools and vomiting Sunday evening. Owner noticed odd odor from stools and hair loss around eyes same day.



Within this notes section Note Glossary entries can be imported to save time.

# Medical Condition Record — Advanced

## Step 4: Objective - Physical exam findings (Veterinarian)



Objective  
DNS: 03-01-18 at 12:37p

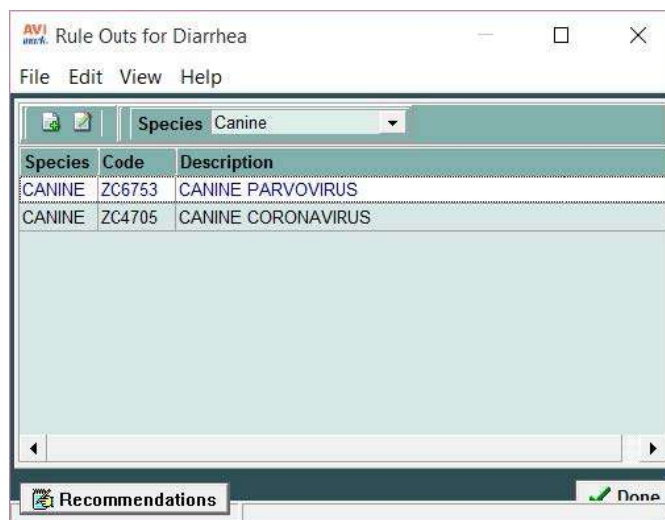
Check All  Uncheck All

<input checked="" type="checkbox"/> General Appearance	Emaciated	<input checked="" type="checkbox"/> Head_Neck	ptyalism
<input checked="" type="checkbox"/> Mentation	Depressed	<input checked="" type="checkbox"/> Trunk_Limbs	Haircoat dull with alopecia around both eyes
<input checked="" type="checkbox"/> Posture/Gait	Normal	<input checked="" type="checkbox"/> Heart_Lungs	Normal
<input checked="" type="checkbox"/> Hydration	Dehydration ~ 8%	<input checked="" type="checkbox"/> Abdomen	Normal
		<input checked="" type="checkbox"/> Genitals/Perineu	Normal

## Step 5: Assessment - Probable diagnoses (Veterinarian)

### Reviewing Rule-outs

- Right-click on the Problem and click **Review Rule-outs**.
- The Rule-outs window will display the possible Diagnosis for the species you are working with for your review.



- If you wish to view the pre-defined recommendation, select the **Recommendations** button at the bottom of the window.
- When finished, click **Done**.

# Medical Condition Record — Advanced

## Choosing Rule-Outs

If you do not wish to utilize the pre-defined Rule-Outs you have the ability choose the Rule-Outs on a “per patient” basis.

- **Right-click | Choose Rule-out** from the Assessment area
- Select the “probable” diagnoses from the diagnosis list with a simple mouse click, then click **Done**

## Accepting Rule-Outs: (possible diagnoses)

- **Right-click** on the problem and click **Accept Rule-outs**. The Assessment area will automatically expand and the Rule-outs for this problem will appear in a light violet color.
- You may remove any of these codes from the Assessment area or you may choose other possible ruleouts by **right-clicking** and selecting the appropriate selection.

## Step 6: Plan - Tests & treatments (Veterinarian)

This area contains treatments and items that will be done to assist the doctor in arriving at a final diagnosis. The Plan area only contains treatments & items.

## Reviewing Protocols

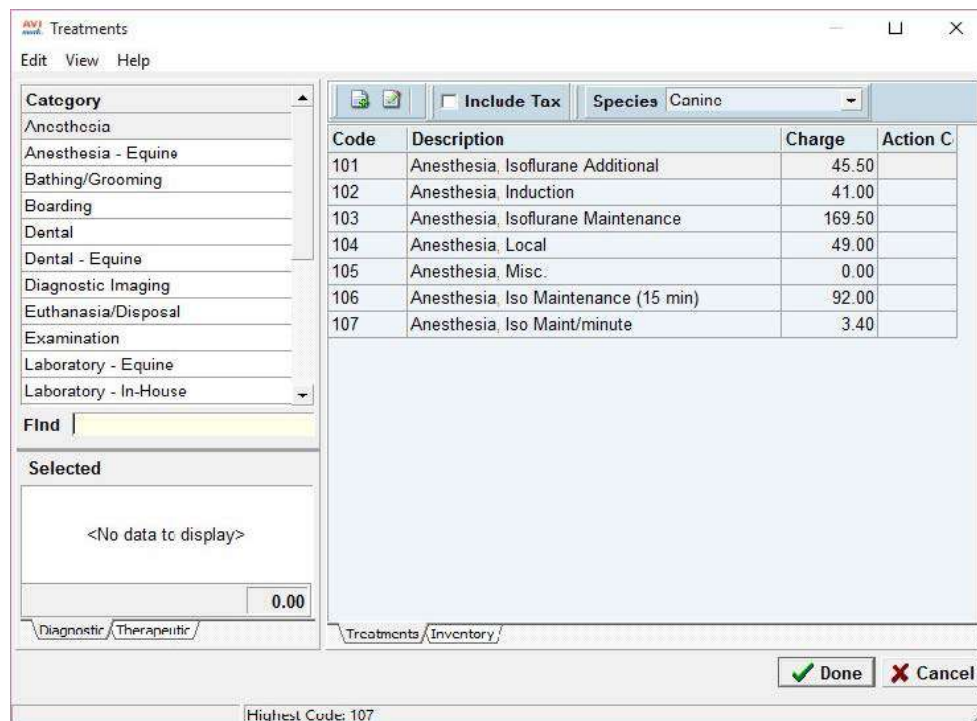
- **Right-click** on the problem and click **Protocol**.
- The Diagnostic Protocol for the species you are working with will appear. After reviewing the Protocol, click **Done**.

## Choosing Diagnostic Protocols

If you do not wish to utilize the pre-defined Diagnostic Protocols, you have the ability choose these Protocols on a “per patient” basis.

- **Right-click | Choose Entry** from the Plan area.
- This will open a tabbed window allowing you to specify the treatments and/or items used as Diagnostic Protocols.

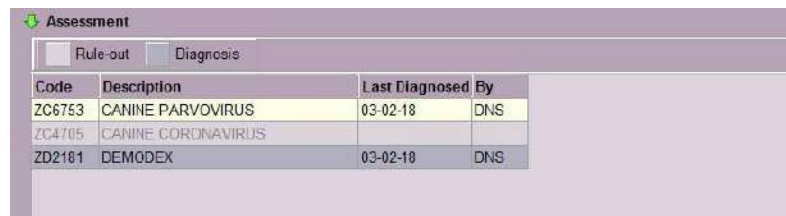
# Medical Condition Record — Advanced



- Select the entries with a **left-click | spacebar**.
- This will in turn add the entries to the selected area.
- Click **Done** and the entries will be added to the Plan area of the Medical Condition Record.

## Accepting Protocols

- **Right-click** the problem and click **Accept Protocol**.
- The Protocols for this problem will appear in the Plan area. These are the treatments and items the doctor will use in making a final diagnosis.
- The Plan area will automatically expand and the Diagnostic Protocols for this problem will appear in a light violet color.

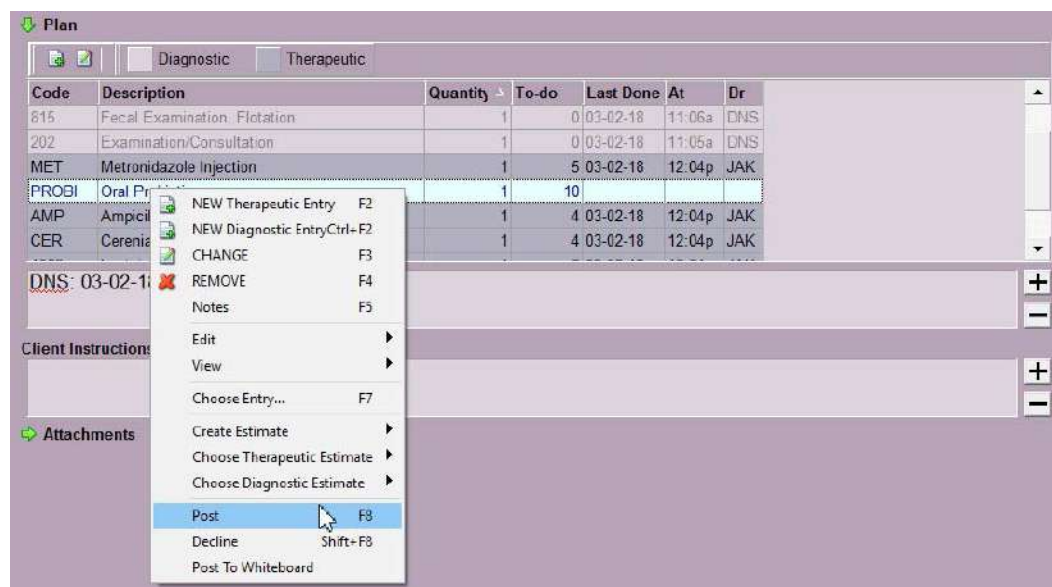


# Medical Condition Record — Advanced

## Posting Protocols to Medical History

Treatments/items that are being performed/dispensed in an effort to diagnose the problem will need to be entered into medical history to assure the client has been charged appropriately.

- Right-click on the treatment/item | **Post (F8)**.



- After the number of times the treatment or item has been administered (posted to medical history) meets the specified number of times it was to be administered (quantity), the treatment or item will appear grayed out in the list.

## Step 7: Rejecting Rule-Outs/accepting a diagnosis (Veterinarian)

As treatments/items are performed/dispensed from the diagnostic protocol section; rule-outs will need to be "rejected" as a diagnosis and the final diagnosis will need to be accepted.

### Eliminating Rule-Outs

- Right-click on the rule-out to be eliminated within the Assessment section | **Reject Rule-out**.

# Medical Condition Record — Advanced

Assessment			
Rule-out		Diagnosis	
Code	Description	Last Diagnosed	By
ZG6643	GASTRIC PERFORATION		
ZF1459	FOREIGN BODY		
ZC6753	CANINE PARVOVIRUS	02-27-12	DNS

- Once a diagnosis has been rejected it will be displayed in a light violet color; to re-activate a rejected entry select the appropriate rule-out and **right-click | Reactivate Rule-out**.



Rule-out notes can also be added to the entry by right-click, **Rule-out notes**. This window can contain information on why the diagnosis was rejected.

## Accepting a final diagnosis

When a final diagnosis has been determined it will need to be indicated as so.

- Right-click** on the diagnosis | **Accept as Diagnosis**. The action will need to be confirmed and the final diagnosis will appear in a dark violet color.

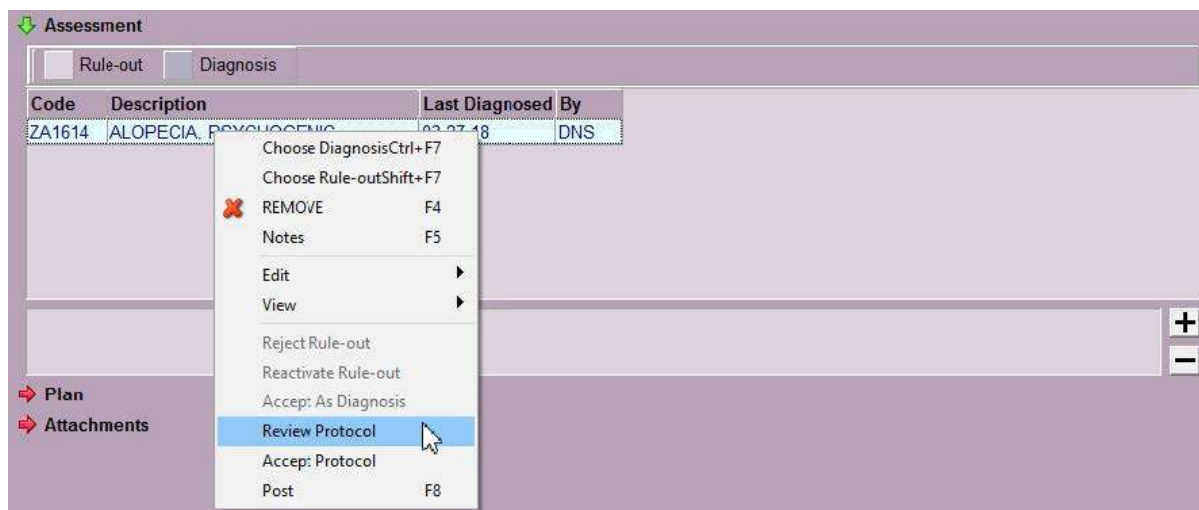
## Step 8: Reviewing/Accepting Therapeutic Protocols (Veterinarian)

This section contains the treatments and items that will be used to treat the diagnosis.

### Reviewing Therapeutic Protocols

- Right-click** on the final diagnosis | **Review Protocol** (this is a pre-defined list of treatments and items used to treat the diagnosis).

# Medical Condition Record — Advanced



- The Treatment Protocol window for that diagnosis will appear for you to review. If you wish to review **Recommendations**, select the Recommendations button. When finished, click **Done**.

## Accepting Therapeutic Protocols

After reviewing the treatment protocol it can be accepted.

- **Right-click** on the **diagnosis | Accept Protocol**. AVImark will automatically enter the Treatments & Items from the protocol into the plan area. The entries will appear in a dark violet color.

## Choosing Therapeutic Protocols

If you do not wish to utilize the pre-defined Therapeutic Protocols, you have the ability to choose these Protocols on a “per patient” basis.

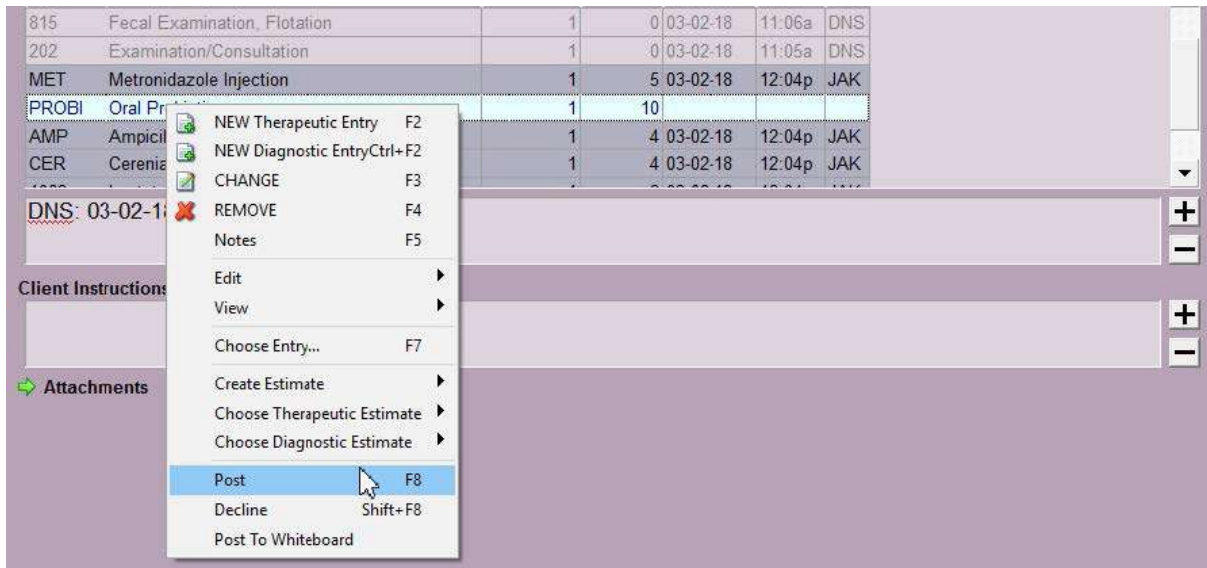
- **Right-click | Choose Entry** from the Plan area.
- This will open a tabbed window allowing you to specify the treatments and/or items.
- Select the **Therapeutic** Tab.
- Select the entries with a **left-click | spacebar**.
- This will in turn add the entries to the selected area.
- Click **Done** and the entries will be added to the Plan area of the Medical Condition Record.



# Medical Condition Record — Advanced

## Posting Therapeutic Protocols to Medical History

- As you perform a treatment or dispense an item, you will **right-click** on that item and **Post** it to Medical History. As you post them, the number of times to be administered decreases (if greater than one).

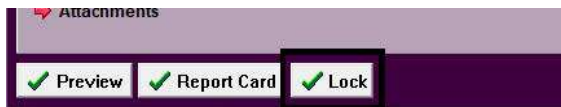


- After the treatment or item has been given, the specified number of times will appear grayed out in the list.

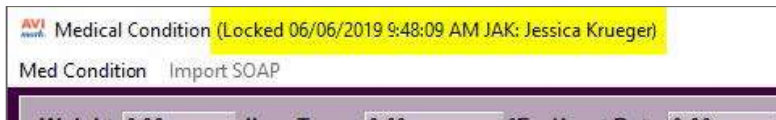
# Medical Condition Record — Advanced

## Locking the Medical Condition Record

A Lock button has been added to the bottom of the Medical Condition Record. This option will allow you to lock the record and prohibit future changes from being made. The only section available to you, after a record is locked, is the attachments area and this is because there may be lab results that need to be added later.

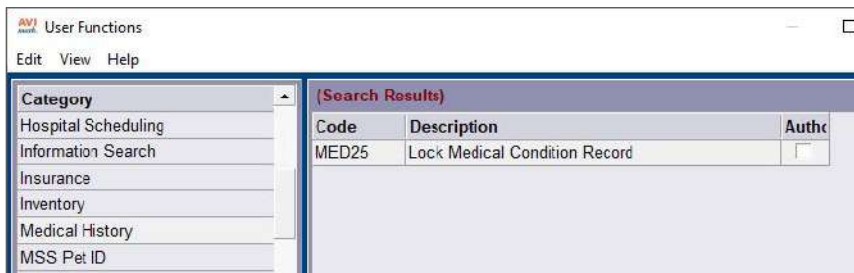


When locking the record, text will be displayed at the top of the window, indicating it is locked and it will include the LOCKED date time and user id.

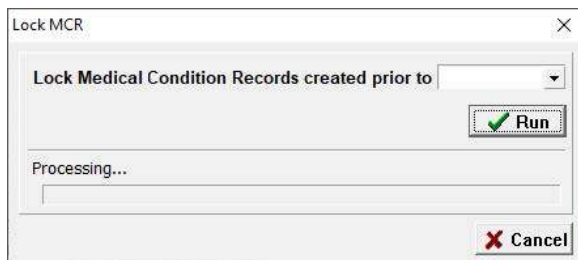


It's important to remember that once a Medical Condition Record is locked, there is no way for you or technical support to unlock the record if needed, also, there will be no way to remove the Medical Condition Record from a patient's medical history.

Because of this, a Security option for locking the MCR has been added to the Users & Security within the Medical History category, under code MED25 Lock Medical Condition Record.



If you would like to take advantage of this feature, for past medical records, there is a utility program available from within AVImark utilities called "lockmcr". This utility will allow you to select a prior to date to lock all Medical Condition Records. Remember that this can't be undone once ran, and if it was run in error you will have to contact technical support to restore a backup.

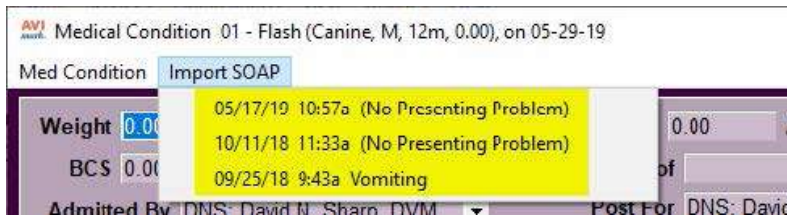


# Medical Condition Record — Advanced

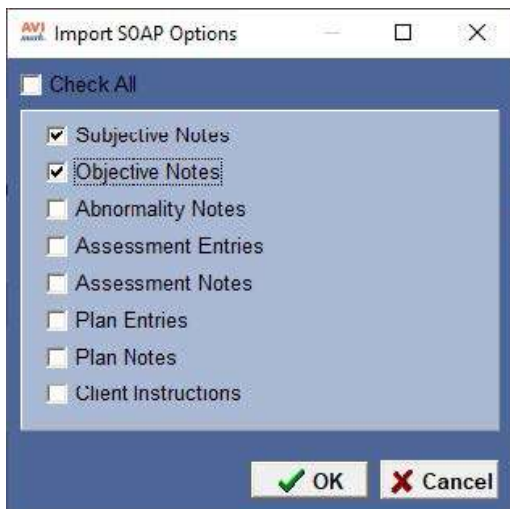
## Importing past Medical Condition Records

There is now a Menu option at the top of the window to Import SOAP. This feature can be used to simplify medical record entry for those patients presenting with chronic conditions.

- To use this feature, simply create a new Medical Condition Record for the patient, enter the vital signs, then, from the menu bar click Import SOAP.



- Once chosen, a SOAP list will open displaying the date, time, and the first problem within the SOAP record. If the SOAP did not have a problem entered, the record will show (No Presenting Problem) in the list.
- When choosing the desired SOAP record, you will be prompted to choose the specific areas you would like to import. This includes selections from Assessment and Plan Entries, as well as notes from the Subjective, Objective (including Abnormalities), Assessment, Plan and Client Instructions. By default, all of the options are selected, so ensure you only have the areas you'd like to import, chosen.
- When you are ready to import simply click **OK**.



# Medical Condition Record — Advanced



**\*Important note:** Please be aware, that there are certain circumstances that will result in either data not being imported, data being overwritten, or duplicate entries.

- If any medical notes are entered into the new MCR, make sure you click **Done** before importing to save the new information. The imported notes will append to any existing notes, if the new MCR was saved.
  - If there are notes on Plan entries, notes will not import.
  - If in the new MCR, you have a Rule-out, then you import an MCR that has the exact Rule-out, the entry will show only once.
  - However, if the new MCR has an accepted Diagnosis and the imported MCR has the same named Assessment but as a Rule-out, it will show both entries: the assessment that is entered as a Diagnosis and the entry that was entered as a Rule-out.
  - This is also true for Plan entries. If a Plan entry is entered as a Diagnostic protocol and the same entry from the imported MCR was also entered as a Diagnostic protocol, only one entry will show after import. However, if the imported entry was entered as therapeutic, then both Plan entries will show after import.
  - It is possible to import an MCR which is locked. Doing so will not unlock the MCR.
  - Presenting problems will not Import because the patient may be presenting different problems at check-in.
  - Lastly, attachments are based on the MCR the user is currently working on. Therefore, attachments from a MCR will not import.
-

# Medical Condition Record — Advanced

## Printing the Medical Condition Record

### MCR Print option

The medical condition record can be printed from within the record itself by utilizing the **Med Condition | Print**

<p>Date: 03-27-18 Date of Visit: 03-01-18</p> <p>Loving Care Animal Hospital MEDICAL CONDITION</p> <p>Page: 1</p> <p>Client: Jones, Mike Patient: Flash Species: CANINE Breed: Bassett Hound Sex: M</p> <p>Age: 12w Weight: 15.00 Temp: 100.70 Respiration: 20.00 Pulse: 144.00 CRT: &lt;2 secs. BCS: 4.00 / 9.00 Other: pale / MM Color</p> <p><b>SUBJECTIVE SECTION</b></p> <p>JAK: 03-01-18 at 12:24p Attitude/Mentation: Depressed Pain: None Stool: Diarrhea for 3 days Urine: Decreased Appetite: None for 3 days Water intake: Decreased Client Notes: Started losing appetite over weekend (but was still playful). Began having loose stools and vomiting Sunday evening. Owner noticed odd odor from stools and hair loss around eyes same day.</p> <p><b>PROBLEM LIST</b></p> <ul style="list-style-type: none"><li>Hypersalivation</li><li>Allopecia</li><li>Lethargic</li><li>Diarrhea</li><li>Vomiting</li></ul> <p><b>OBJECTIVE SECTION</b></p> <p>DNS: 03-01-18 at 12:37p:</p> <p><b>ABNORMALITIES</b></p> <ul style="list-style-type: none"><li>General Appearance: Emaciated</li><li>Mentation: Depressed</li><li>Hydration: Dehydration ~ 8%</li><li>Head &amp; Neck: ptosis</li><li>Trunk &amp; Limbs: Harcoat dull with alopecia around both eyes</li></ul> <p>Normal Systems: Posture/Gait, Heart &amp; Lungs, Abdomen, Genitals/Perineum</p> <p><b>ASSESSMENT SECTION</b></p> <p><b>RULE-OUTS</b></p> <ul style="list-style-type: none"><li>CANINE PARVOVIRUS</li><li>CANINE CORONAVIRUS (REJECTED)</li></ul> <p><b>DIAGNOSES</b></p> <ul style="list-style-type: none"><li>DEMODEX</li></ul>	<p>Date: 03-27-18 Date of Visit: 03-01-18</p> <p>Loving Care Animal Hospital MEDICAL CONDITION</p> <p>Page: 2</p> <p>Client: Jones, Mike Patient: Flash Species: CANINE Breed: Bassett Hound Sex: M</p> <p><b>PLAN SECTION</b></p> <p><b>NOTES</b></p> <p>DNS: 03-02-18 at 11:05a:</p> <p><b>DIAGNOSTIC PLAN</b></p> <ul style="list-style-type: none"><li>Skin Scraping</li><li>Parvovirus Test, Snap ELISA</li><li>Fecal Examination, Flotation</li><li>Examination/Consultation</li></ul> <p><b>TREATMENT PLAN</b></p> <ul style="list-style-type: none"><li>Metronidazole Injection</li><li>Oral Probiotics</li><li>Amoxicillin Injection</li><li>Cerenia Injection</li><li>Lactated Ringers 1L</li><li>Catheterization, Intravenous</li></ul>
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### Patient Chart

When Printing the Patient Chart, **right-click** in patient area, select **Chart**. In the Include window, select **Medical Condition** to print the SOAP information for the patient.

# Medical Condition Record — Advanced

AMV Patient Chart Form

Print Using Chart Terms  
Print For: 99 Visits

Print Using Date Range  
From: 3/1/2018 To: 3/27/2018

View: Chronological  
Quality: Picture  
Report Codes: [Dropdown]

Public Chart  
 Print a Chart For All Patients  
 Print Medical History Chronologically  
 Enter Chart Notes...

Weight History for Chart Terms/Date Range?   
Weight History From Date: [Dropdown]

Print History For Site: (all)

Print To: Microsoft Print to PDF

Preview  Print  Cancel

Include the Following...

- Follow Ups
- Forms
- Health Summary
- History Alert
- History More Stuff
- History Notes
- Hospital Address
- Hospital Name On Page
- Inventory Used
- Medical Condition
- Patient Added Date
- Patient Alert
- Patient More Stuff
- Patient Notes
- Patient Record Number
- Photographs
- Problem History
- Referral Phone
- Reminders
- SOAP Client Instructions
- Tests
- [Unreadable]
- Save Settings On Close
- Save Settings For All Users

Patient Chart for Flash  
Date: 03-27-18, Time: 4:34p  
Client: Mr/Mrs. Mike Jones  
Page: 2

Date	By	Code	Description	Qty (Variance)	Amount
03-01-18	DNS	PD696 PE7970	Diarrhea Vomiting		

Age: 12w Weight: 15.00 Temp: 100.70 Respiration: 20.00 Pulse: 144.00  
CRT: <2 secs. BCS: 4.00/9.00 Other: pale / MM Color

**SUBJECTIVE SECTION**  
JAK: 03-01-18 at 12:24p:  
Attitude/Mentation: Depressed  
Pain Notes  
Stool: Diarrhea for 3 days  
Urine: Decreased  
Appetite: None for 3 days  
Water Intake: Decreased  
Client Notes: Started losing appetite over weekend but was still playful. Began having loose stools and vomiting Sunday evening. Owner noticed odd odor from stools and hair loss around eyes same day.

**PROBLEM LIST**  
Hypersalivation  
Alopecia  
Lethargic  
Diarrhea  
Vomiting

**OBJECTIVE SECTION**  
DNS: 03-01-18 at 12:37p:  
**ABNORMALITIES**  
General Appearance: Emaciated  
Mentation: Depressed  
Hydration: Dehydration - 6%  
Head & Neck: gitation  
Trunk & Limbs: Haircoat dull with alopecia around both eyes.  
Normal Systems: Posture/Gait, Heart & Lungs, Abdomen, Genitals/Perineum

**ASSESSMENT SECTION**  
**RULE-OUTS**  
CANINE PARVOVIRUS  
CANINE CORONAVIRUS (REJECTED)  
**DIAGNOSES**  
DEMIODEX

Patient Chart for Flash  
Date: 03-27-18, Time: 4:34p  
Client: Mr/Mrs. Mike Jones  
Page: 3

Date	By	Code	Description	Qty (Variance)	Amount
<b>PLAN SECTION</b>					
<b>NOTES</b>					
DNS: 03-02-18 at 11:05a:					
<b>DIAGNOSTIC PLAN</b>					
Skin Scraping Parvovirus Test, Snap ELISA Fecal Examination, Floation Examination/Consultation					
<b>TREATMENT PLAN</b>					
Metronidazole Injection Oral Probiotics Ampicillin Injection Cerenia Injection Lactated Ringers 1L Catheterization, Intravenous					
My Documents\030218-1-18-Flash.DOC My Documents\032618-1-18-Flash.DOC					

# Medical Condition Record — Advanced

## Printing the patient Report Card

The Report Card is a document that is created in Microsoft® Word and saved on the server computer. This document can contain merge words to include information that is contained within the selected Medical Condition Record.

- Within the Medical Condition Record menu, click on **Med Condition | Report Card**.
- Select the appropriate document to print.

### Hospital-wide Report Card Documents

- In Advanced Options one default document is used for all report cards.
- From the Options Maintenance window enter Default Report Card Document in the Search field to attach an individual document.

### Species specific Report Card Documents

- From System Tables | Species Table, **right-click | Change** on each species to attach a document.
- Clicking on the Report Card button will open a Windows Open dialog box with the document automatically selected and ready to print.



**When a species specific document has been setup it will take precedence over the Advanced Options default document.**

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# Medical Condition Record — Advanced

**PATIENT REPORT CARD**

Owner's Name: <i>Mary Susman</i> Patient Name: <i>Bonnie</i> Breed: <i>Poodle, Toy</i> Sex: <i>Female</i> Color: <i>Chocolate</i>	Doctor: <i>David N. Sharp, DVM</i> Date: <i>03-26-18</i> Time: <i>9:19a</i>
---	---

Reminders

03-26-19     *Canine DA2PP Vaccination*  
 03-25-21     *Canine Rabies Vaccination, Syr*

**Bonnie's Weight History**

Date taken	Weight (lbs)
03-01-08	7.53
04-23-08	7.82
05-25-08	48.5
07-14-08	7.81
12-02-08	8.38
05-27-09	4.94

**Physical Examination**

Weight: <i>lbs</i> Temperature: <i>°F</i> Heart Rate: <i>/min</i> Respiratory Rate: <i>/min</i>	Capillary refill Time: Body Condition Score: <i>of 9</i> Mucous Membrane Color: Pain Scale: <i>0</i>
--	---

Presenting Problems

*Vaccs.*  
*Attitude/Mentation: Alert*  
*Pain: None*  
*Stool: Normal*  
*Urine: Normal*  
*Appetite: Normal*  
*Water Intake: Normal*  
*Vomition: None*

Exam Findings

*Normal: Appearance, Mentation, Posture/Gait, Hydration, Head/Neck, Trunk/Limbs, Heart/Lungs, Abdomen, Genitals*

## Medical Condition Record merge words

- |   |   |   |
|---|---|---|
| <soap-weight><br><soap-resp-rate><br><soap-temp><br><soap-heart-rate><br><soap-crt><br><soap-bcs><br><soap-diagnoses> | <soap-bcs-high><br><soap-other><br><soap-other-high><br><soap-painscale><br><soap-problems><br><soap-problem-ruleouts><br><soap-assess-notes> | <soap-problem-protocols><br><soap-subj-notes><br><soap-obj-notes><br><soap-abnormalities><br><soap-abnormality-%><br><soap-ruleouts><br><soap-diagnostic> |
|---|---|---|



# Medical Condition Record — Advanced

## Finding Medical Condition Records on CID

Select the **SOAP** tab in medical history to find all entries in medical history that has a Medical Condition Record attached.

S.O.A.P View										
Date	Time	Dr.	Type	Code	Description	Qty	Amount	By	Photo	Public?
03-01-18	12:13p	DNS	V (mg)	VI\$IT	Patient check-in					Yes

Chronological / Diet / Injections / Lab / Diagnoses / Rx / Reminder / Surgery / Vaccs / X-Ray / **SOAP** / Photos / Notes / Public / Problems / Attachment / D

- The **Type** field in the Medical History window will display **(m)** if the Medical Condition Record is attached.

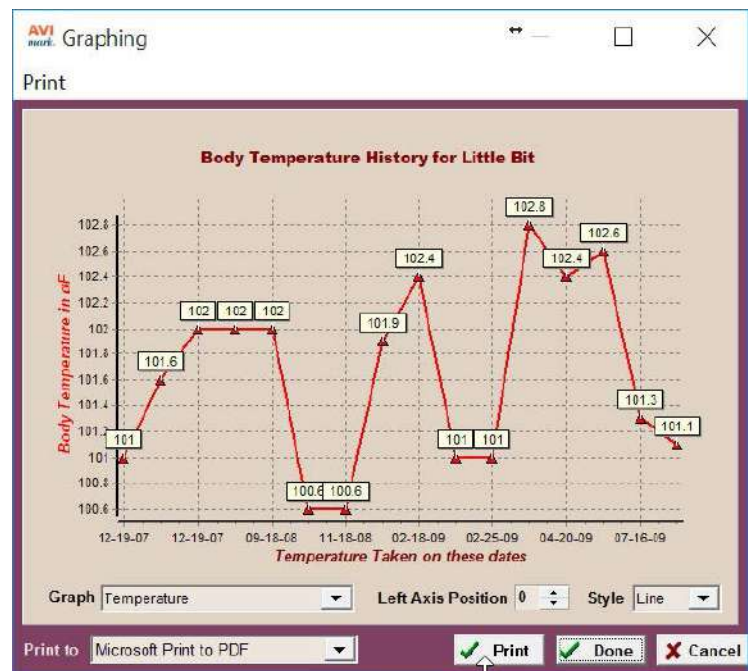
Medical History											
Date	Time	Dr.	Type	Code	Description	check	Qty	Amount	By	Photo	Public?
03-01-18	12:13p	DNS	V (mg)	VI\$IT	Patient check-in						Yes

- In the Medical Condition Record, use the **Next** and **Prev** buttons to scroll through the Patient's Medical Condition Records.

Preview Report Card Prev Next Done Cancel Help

## Graphing vital signs

Graphing options are available for Weight, Temp, Resp rate, Heart rate, and BCS. Select in the appropriate field to graph and choose **Med Condition | Graph Values**. The Vital Sign you are graphing will include all recorded entries for the Vital Sign in the patient's Medical Condition Records.





# Check-in workflow options

# Check-in workflow options

**Before setting these check-in workflow options in Advanced Options, ask yourself the following questions:**

- Which area will you primarily be working from?
  - ◇ CID
  - ◇ Whiteboard
  - ◇ Medical Condition Record
- When do you need the Medical Condition Record to display?
  - ◇ At time of check-in?
  - ◇ When an exam is entered into Medical History?
- Do you want appointments to auto-copy treatments/items/problems to Medical History?
- Do you want appointments to auto-copy treatments/items to Whiteboard?
- Do you want appointments to auto-copy treatments/items to Medical Condition Record?
- Do you want appointments to auto-copy problems to Medical Condition Record?
- Do you want the Whiteboard to automatically open at check-in so more information can be entered?

## Advanced options

### Check-in process

#### Post Appointment Notes to Medical History

Creates an “Appointment Notes” line in Medical History when the patient is only checked-in from the appointment calendar. Any notes on the appointment will be auto-copied to this line. A line will not display if there are no notes on the appointment. Don't use this option with the Post Visit to Medical History because the notes will be duplicated.

- ◇ True – Turns option on
- ◇ False – Turns option off

# Check-in workflow options

## Post Visit to Medical History

Adds a bold "Patient Check-in" line in Medical History when the patient is checked-in. This line will include appointment notes if notes were entered on the appointment at time of check-in.

- ◆ True – Turns option on
- ◆ False – Turns option off

## Record treatments/items selected for appointment to patient's Medical History?

Automatically enters the treatments, items, problems and/or diagnoses selected on the appointment to Medical History as unposted entries.

- ◆ Prompt – Asks if you would like to add the entries to Medical History.
- ◆ Yes – Automatically adds the entries to Medical History without asking.
- ◆ No – Turns option off

## Post appointment treatments/items to Medical Condition Record?

Automatically enters only the treatments and/or items, selected on the appointment, to the Plan area as an unposted diagnostic entry on the Medical Condition Record.

- ◆ Prompt - Asks if you would like to add the entries to Medical Condition Record.
- ◆ Yes - Automatically adds the entries to Medical Condition Record without asking.

## Post appointment notes to Medical Condition's chief complaint?

Copies the appointment notes and pastes them automatically within the Subjective area of the Medical Condition Record.

- ◆ Prompt - Asks if you would like to add the notes to the Medical Condition Record.
- ◆ Yes - Automatically adds the notes to Medical Condition Record without asking.

## Post appointment problems to Medical Condition Record?

Adds the problems selected within the appointment to the Medical Condition Record within the Problems area. This will also enter the Problem in Medical History as well as the patient's

# Check-in workflow options

problem history.

- ◆ Prompt - Asks if you would like to add the Problem to the Medical Condition Record.
- ◆ Yes - Automatically adds the Problem to Medical Condition Record without asking.

## Medical Condition Record

### Create Medical Condition Record?

Asks each time if you would like to open the Medical Condition Record either through check-in or by opening it manually.

- ◆ Prompt - Asks if you would like to open the Medical Condition Record.
- ◆ Yes - Automatically opens the Medical Condition Record without asking.
- ◆ No – Doesn't open the Medical Condition Record and will not ask.

### Show Medical Condition Record

Displays the Medical Condition Record automatically at check-in. With this option set to False the Medical Condition Record can still be manually opened through the right-click option or the checkbox in the Attachments area.

- ◆ True – Turns option on
- ◆ False – Turns option off

## Whiteboard

### Highlight Waiting after elapsed minutes

Changes the time, in the Waiting column of the Whiteboard, to red after the defined number of minutes has lapsed.

- ◆ Enter the number of default minutes

# Check-in workflow options

## Set patient waiting on check-In

Automatically begin calculating the amount of time the patient has been in the hospital from the time the patient is checked-in.

- ◆ True – Turns option on
- ◆ False – Turns option off

## Copy appointment notes on check-in

Automatically copies notes entered on the appointment to the patients check-in line on the Whiteboard within the checked-in tab.

- ◆ True – Turns option on
- ◆ False – Turns option off

## Post appointment treatments/items to Whiteboard?

Automatically adds the treatments and/or items chosen on the appointment to the Whiteboard schedule tab as unposted.

- ◆ Prompt - Asks if you would like to add the treatments/items to the Whiteboard.
- ◆ Yes - Automatically adds the treatments/items to the Whiteboard without asking.

## Show Whiteboard

Automatically displays the Whiteboard window when the patient is checked-in. (allowing the staff to enter any additional notes to Whiteboard)

- ◆ True – Turns option on
- ◆ False – Turns option off

## Record unposted Medical History onto Whiteboard as completed tasks?

When entering Medical History entries, this option will make a copy of those entries and add them to the Whiteboard schedule tab as completed.

- ◆ Prompt - Asks if you would like to record the Medical History to Whiteboard as completed tasks.
- ◆ Yes - Automatically adds the Medical History to Whiteboard as completed tasks.
- ◆ No – Doesn't add the Medical History to Whiteboard as completed tasks and will not ask.