



# Academy SOLUTIONS VET

## Module 5 - Medical Files

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**\*\* IMPORTANT NOTICE \*\***

*It is possible that some graphics and descriptions presented in our online training modules differ from your software version.*

**The Solutions Vet Academy** regularly updates its modules; however this software is in continuous development.

## 1. Adding or Modifying an Animal

In Training Module 1 (section 4 - How to create users) we reviewed how to add and modify a Person. Now, let's review the Animal details.

From the Search window, you will retrieve the client's file. Search your system using the client's phone number, with partial or complete name or even using an email address.

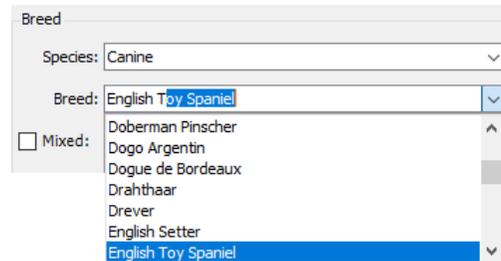
Search type	Phone:	Person name:	Email:	Identification #:	Reference #:	Patient name:	Rabies tag #:	Year:	Patient #:	Patient ref #:																																																																		
<input checked="" type="radio"/> Owner / Patient <input type="radio"/> Person <input type="radio"/> Company <input type="radio"/> Visit		smith			R																																																																							
Include patients that are: <input checked="" type="checkbox"/> Given <input checked="" type="checkbox"/> Deceased <span style="float: right;">1 person found</span>																																																																												
<table border="1"> <thead> <tr> <th>Search type</th> <th>Phone:</th> <th>Person name:</th> <th>Email:</th> <th>Identification #:</th> <th>Reference #:</th> <th>Patient name:</th> <th>Rabies tag #:</th> <th>Year:</th> <th>Patient #:</th> <th>Patient ref #:</th> </tr> </thead> <tbody> <tr> <td>Smith, Mr John</td> <td></td> <td></td> <td></td> <td>24954 - R.218398</td> <td>(514)555-3333</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Sonny</td> <td></td> <td></td> <td></td> <td>40255</td> <td></td> <td>Feline</td> <td></td> <td></td> <td></td> <td>Sphinx</td> </tr> <tr> <td>Tobby</td> <td></td> <td></td> <td></td> <td>40248 - R.1000012345</td> <td></td> <td>Canine</td> <td></td> <td></td> <td></td> <td>English Toy Spaniel</td> </tr> <tr> <td>40248-004</td> <td></td> <td></td> <td></td> <td>Dr John Dolittle</td> <td>21-Aug-2019</td> <td></td> <td></td> <td></td> <td></td> <td>External - TEST</td> </tr> <tr> <td>40248-003</td> <td></td> <td></td> <td></td> <td>Dr John Dolittle</td> <td>19-Aug-2019</td> <td></td> <td></td> <td></td> <td></td> <td>External - Exam</td> </tr> </tbody> </table>											Search type	Phone:	Person name:	Email:	Identification #:	Reference #:	Patient name:	Rabies tag #:	Year:	Patient #:	Patient ref #:	Smith, Mr John				24954 - R.218398	(514)555-3333						Sonny				40255		Feline				Sphinx	Tobby				40248 - R.1000012345		Canine				English Toy Spaniel	40248-004				Dr John Dolittle	21-Aug-2019					External - TEST	40248-003				Dr John Dolittle	19-Aug-2019					External - Exam
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To **Add** a new Animal, click on the **“New patient”** button.

- User can enter either the date of birth or the age; the software will calculate the other value instantly.
- Age format is entered as years months days.
- Animals can be added without a name, the system will name them “Unknown”.

To **Edit** Animal information, either:

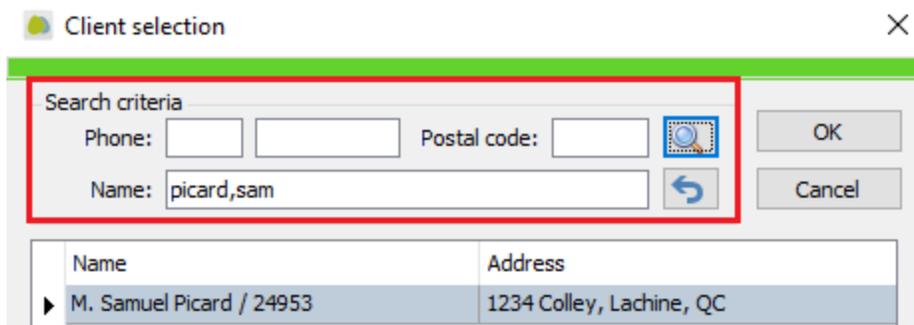
- Select the Animal in the Search screen then click on “**Modify**”. Or double click on the Animal in the Search screen to open the “Patient” window.
- While most fields are self-explanatory, we should discuss a few:  
**Species/Breeds/Colours:** This data must be picked from the drop-down menus.
- To preserve consistency of data, users cannot type their own information into these fields.
- If you need to add a new species, breed or colour, you must do this from «**Configuration**» > «**Tables**».
- As the user begins to type into one of the fields, the system will filter through the list of available choices.
- Once you find the appropriate selection, click on it to load it into the Animal details.



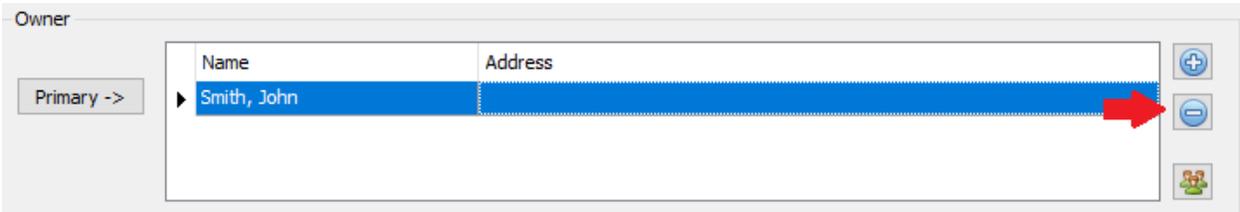
### 1.1 Fields

**Owners:** You can link the animal to more than one owner. This allows you to search for the animal by different last names if needed.

- The primary owner will receive all reminders.
- Use the  symbol to add an owner.
- Search for additional owners by any combination of name, phone number and/or postal code.
- Click on the desired owner and click on OK.

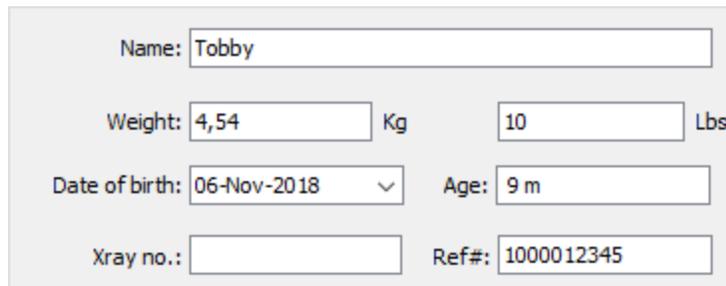


- Use the  symbol to remove an owner (first, select the owner by clicking on the entry).



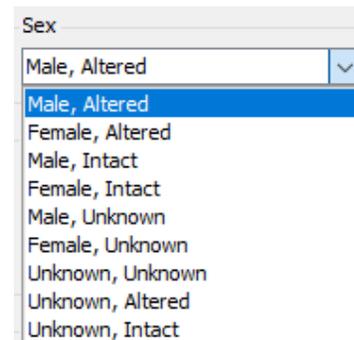
**Patient:** Enter the information of the animal

- Name, weight, date of birth or age (See point 1).
- Xray no: Indicate the number associated with the x-ray file(s) of the animal.
- Ref #: Use to enter the microchip number.



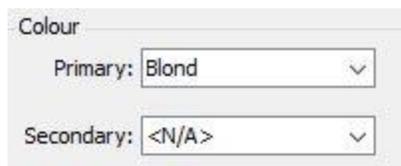
**Sex:** Enter the gender of the animal

Note that when you sell a sterilization service with a “Sterile” post-sale updates it will automatically change the animal’s status to “Altered”.



**Colour:** Indicate the color of the animal

- When the user starts typing in one of the fields, the software will filter the list of available choices.



**Breed:** Indicate the breed of the animal

- Check the “Mixed” box to indicate a secondary breed.
- When the user starts typing in one of the fields, the software will filter the list of available choices.

**Behaviour:** You can also specify the behaviour of an animal by selecting one or more behaviours.

- The  is used to add behaviour.
- The  is used to remove behavior.
- Behaviours are added to your system under “**Configuration**” > “**Tables**” > “**Behavior**”.

**Supplementary informations:**

- Goes out: Indicates if the animal is going outside the house.
- Goes out of the country: Indicates if the animal is leaving the country.
- Has been in a kennel: Indicates if the animal is attending a kennel.
- No longer owner: Indicates that the animal no longer belongs to the owner. You can enter the date the owner gave the animal.
- Deceased: Indicates if the animal has died. You can enter the date of death. If you sold a service with a “Deceased” post-sale updates to the animal the box will be ticked and the date will be entered automatically.
- License number: Indicates the number and the year of the municipality license.

**Regular veterinarian:** Use when patient is referred to you by another hospital and/or veterinarian

- To be able to select them, you must first add the veterinarians and the clinics to your database using the button “New person” from your search window. The buttons allows you to display the “Person” window of the veterinarian or clinic.
- You can view the complete or specific list.  
By using “Complete list” the software will display the list of all clinics and veterinarians.  
By using “Specific list” the software will only display the veterinarians from the selected clinics or the opposite.
- You can quickly add or remove a veterinarian from a clinic. Just select the clinic then a veterinarian and click on or

## 1.2 Complementary informations:

Other types of information are available on this screen, you will notice several buttons on the right side.

**Choose picture:** To add the animal's picture

- Browse your computer to locate the desired photo and click on Open.
- Vetware will make a compressed copy of the original file and store it in the Data folder on the server. The new copy will be included in your automated backups, allowing you to delete the original file.
- Animal pictures can be printed on Invoices, Estimates and the Medical File.

**Weight:**

- User may view the entire weight history or select the past years.



**Vaccinations:**

- Displays the vaccination history for the animal.
- By default, only the last vaccinations are displayed.
- You can remove this check mark to display all vaccinations as of a specified date.
- Users can also filter the results to look for specific vaccines.

Patient - [40248] - Solutions Vet Inc. TEST 5.7

**Tobby, Male, Altered**  
 Canine, English Toy Spaniel, Blond  
 06-Nov-2018, 9 mths 5,9 Kg/13 Lb

Vaccination history  
 Last vaccinations Since: 19-Aug-2014 For: All vaccines

Vaccine	Vaccination sche...	Date given	Due date	Year	Rabies tag no.	Product:	Serial no.
Bordetella	monthly	05-Feb-2019	05-Mar-2019				
DHPP	2nd monthly boo...	05-Feb-2019	05-Mar-2019				

- Vaccine information can be modified here, by double clicking on a vaccination record.
- User can input Rabies Tag numbers and/or Vaccine Serial numbers as well as change the Effective date and Next Vaccination date.
- Note: Reminders cannot be edited from this section (they can be edited from the Reminder list).

Vaccination - Solutions Vet Inc. TEST 5.7

Vaccine / Vaccination schedule	
<input checked="" type="checkbox"/>	Rabies Yearly

Effective date: 05-Mar-2019      Next vaccination: 03-May-2020

Generate reminders      Reminders: Annual vaccine booster      Due date: 03-May-2020      257

Year: 2019      Rabies no.: 1562011      Serial no.: S544693A

OK      Close

- To remove a vaccination record, select it and click on the icon.
- Users can also add a vaccination record using the icon.
- Choose the appropriate **Vaccine/Vaccination schedule** from the available list.
- Set the appropriate **Effective** and **Next vaccination Date**.
- Select the appropriate **Reminder** (if desired).
- Enter any tag or serial numbers, as required.

Vaccination - Solutions Vet Inc. TEST 5.7

Vaccine / Vaccination schedule	
<input checked="" type="checkbox"/>	Bordetella monthly
<input type="checkbox"/>	Bordetella Yearly
<input type="checkbox"/>	DHPP 1st monthly booster
<input type="checkbox"/>	DHPP 2nd monthly booster
<input type="checkbox"/>	DHPP Annual booster
<input type="checkbox"/>	DHPP 3 years booster
<input type="checkbox"/>	DHPP Lepto (No vaccination schedule)
<input type="checkbox"/>	DHPP Lepto Lyme (No vaccination schedule)

Effective date: 19-Aug-2019      Next vaccination: 19-Aug-2020

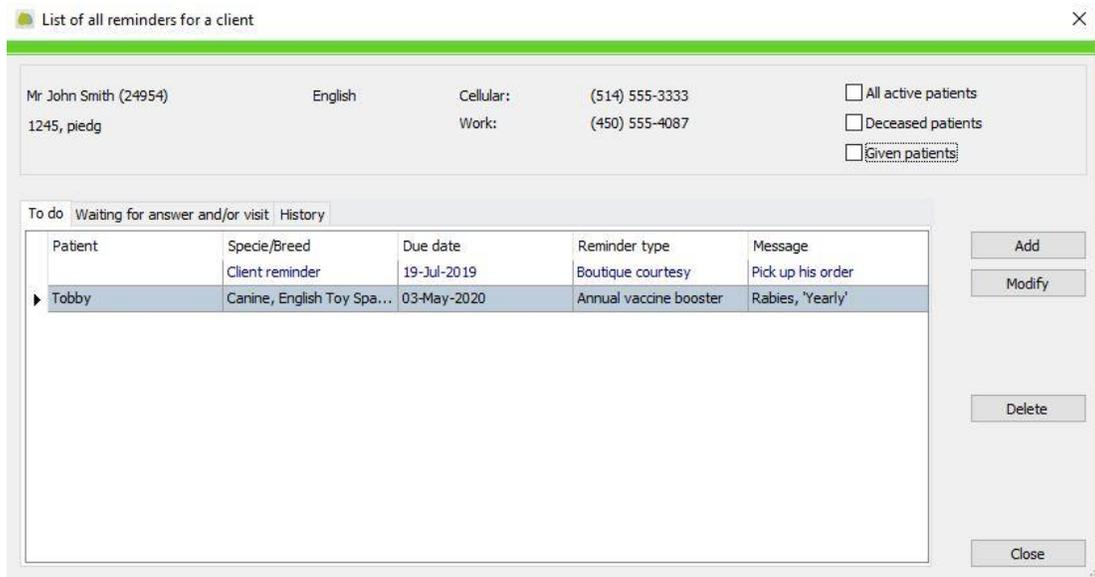
Generate reminders      Reminders: <N/A>      Due date: 19-Aug-2020      366

Year:      Rabies no.:      Serial no.:

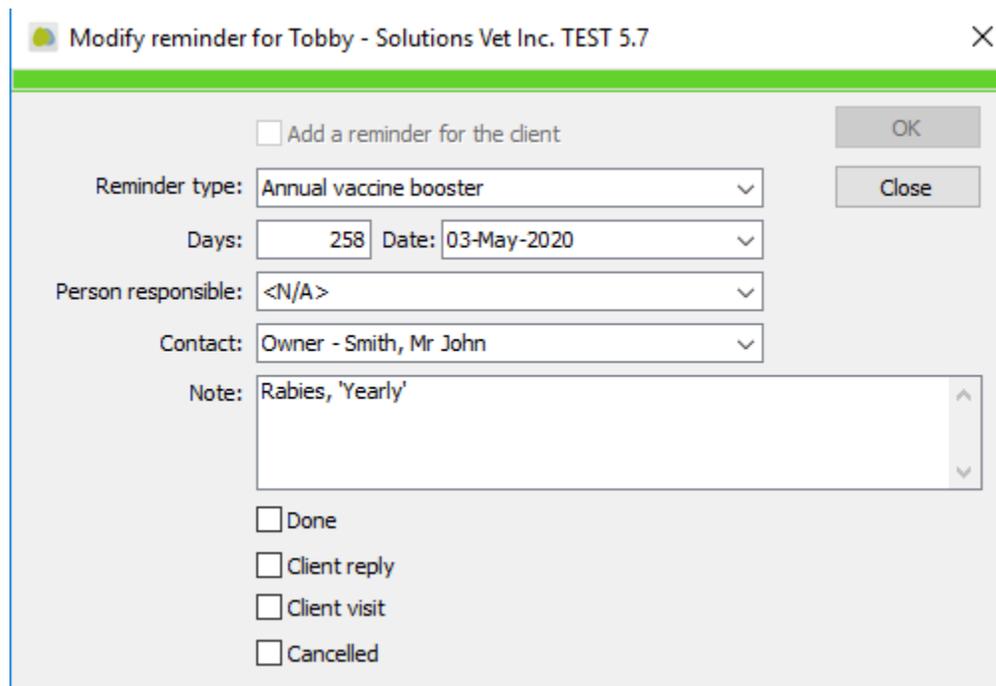
OK      Close

**Reminders:**

- Here you can review and/or modify all the reminders for the animal.
- By default, reminders are displayed for the selected animal and client reminders.
- Using the check boxes in the upper right, you may also view reminders for other animals of the client.
- Reminders are categorized under **“To Do”**... **“Waiting for answer and/or visit”**... **“History”** (lists all completed or cancelled reminders).



- Using the buttons on the right, reminders can be **Added. Modified or Deleted.**
- To modify a reminder, double click on it, or select it, then click on **Modify**.
- This is where you can change the **Reminder type, Due date, Person responsible, Notes and/or status.**



**Attachment:**

- Here you will find all the Medical file attachments, such as X-rays, Lab Results, etc.

The screenshot shows a patient record window for 'Patient - [40248]'. The patient's name is 'Tobby, Male, Altered', breed is 'Canine, English Toy Spaniel, Blond', and birth date is '06-Nov-2018' with a weight of '5,9 Kg/13 Lb'. A photo of the dog is shown. Below the patient info are filters for 'Xray', 'Lab test', and 'Other attachment', along with date range selectors for 'Date from: 06-Nov-2018' and 'To: 19-Aug-2019'. A table lists attachments:

Visit	Effective date	SOAP / Attachment description
▶ 2	23-May-2019	IDEXX Blood tests - IDEXX Biochemical EXT 1... - CHM17

Below the table are two links: 'Open the medical file' (red text) and 'Open the attachment' (blue text). A 'Close' button is at the bottom right.

- The first line indicates the Visit number, date and the description of the item where the attachment was tied. By double clicking on this line, you will be taken to this visit in the **Medical file**.
- The attachment description appears under this record; double click on this line to view the **attached file**.

**Prob. List (SMH: Significant Medical History):**

- Here you can view and/or update the patient's **Problem list**.
- You can configure your Problem list options from **Configuration > Tables > SMH**.

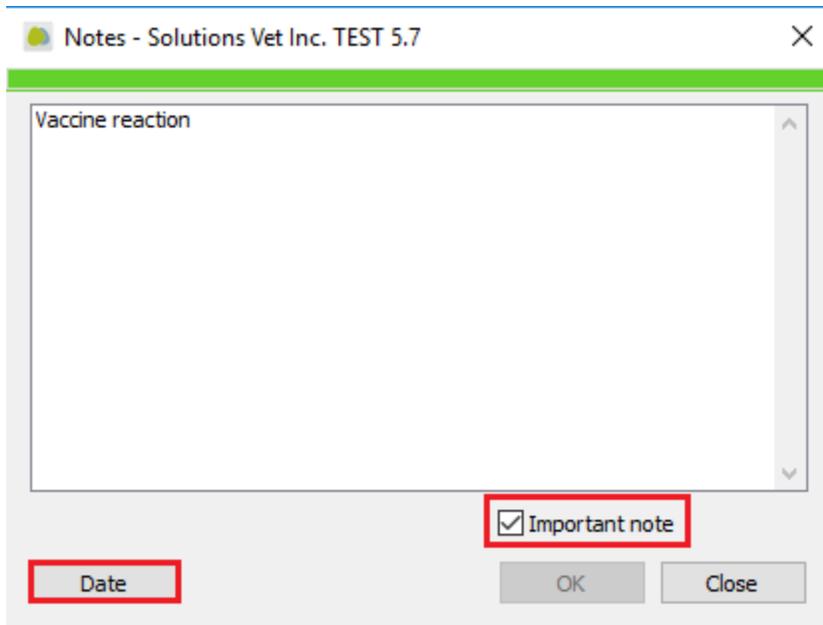
The screenshot shows a window titled 'Problem list history' with a table containing the following data:

Description	Visit no	Identified date	Follow-up date	Resolved date	Comment
▶ Cardiac failure		12-Jun-2019	19-Aug-2019		Heart murmur Grade II/VI

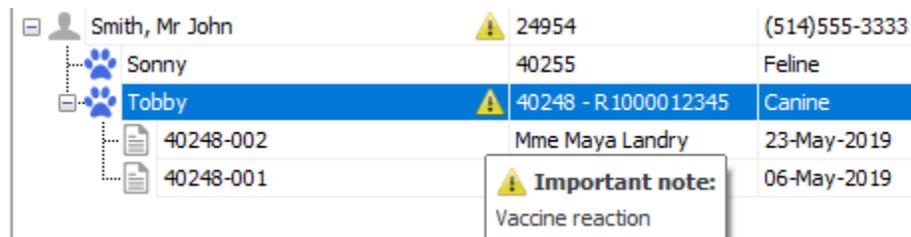
**Notes:**

As with the client’s file, notes or memos can be added to the Animal file by clicking on this button.

- Type the notes into the memo box.
- Use the “Date” button in the lower left to insert a date stamp.
- Notes can be flagged as important using the check box in the lower right.



- Notes are internal memos for the clinic and do not appear on client records.
- Notes are visible when the cursor hovers over the animal name, in the search screen.
- An exclamation mark appears to the right of the animal name when there’s a note added to the file.



## 2. Creating a New Visit

You can open a new visit from the Search screen. First, in order to find the customer, you can search by using the client's phone number, partial or full client's name or even by the email address. Select the client and click on the + sign in front of the name. This will list the animals for this client.

- Select the animal, then click on **New Visit**.

Search - Smith, Mr John [24954]

Search type:  Owner / Patient,  Person,  Company,  Visit

Phone: [ ] [ ] Person name: smith Email: [ ] Identification #: [ ] Reference #: R [ ] Patient name: [ ] Rabies tag #: [ ] Year: [ ] Patient #: [ ] Patient ref #: [ ]

Include patients that are:  Given  Deceased 1 person found

Smith, Mr John	24954 - R218398	(514)555-3333	
Sonny	40255	Feline	Sphinx
Tobby	40248 - R.1000012345	Canine	English Toy Spaniel

Buttons: Close, New person, New patient, **New visit**, Admission, Discharge, Modify

The **New Visit** window will appear. The information entered in this window will be found at the beginning of the visit to the medical file. Mandatory fields will be indicated by a red X.

Visit creation - Tobby [40248] - Solutions Vet Inc. TEST 5.7

Weight:  (5,9 kg)  (13 lb) Body score: 5 Open date: 19-Aug-2019 14:21:25

Create new client visit  Departure

Note: [ ]

Owner(s): Mr John Smith Client: Mr John Smith, 1245 piedg, Change client

Detail Referral

Urgent Reason:  <N/A>

Subjective: [ ]

Reminder response:	Due date	Done date	Reminder type	Description
<input type="checkbox"/>	03-May-2020		Annual vaccine booster	Rabies, 'Yearly'

Department: <N/A> Room: <N/A>

Assigned veterinarian: <N/A> Cage: <N/A>

Regular veterinarian and establishment

Clinic: <N/A> Veterinarian: <N/A>

Buttons: Add veterinarian to clinic, Remove veterinarian from clinic

Weight:

- Enter the animal's weight. By default; the system will display the last weight on file.
- You may enter the weight in either pounds or kilos. Vetware will convert the weight to update the other value automatically.
- You can also enter the body score of the animal.

Weight:  (5,9 kg)  (13 lb) Body score:

Open date:

- You can modify the date and time of visit (By default it's the current date and time).

Open date:

Owner:

- If the animal has multiple owners, they will all be listed in the **Owner(s)** section.

Owner(s):   
  
 Client:   

- The **Client** field indicates the person who will be responsible for payment for this visit.
- By default, it will be the client with whom you initiated the visit.
- You can use the **Change Client** button  to search for a different client to whom you wish to allocate the charges for this visit.
- In this example, Toby has two owners: John Smith and Samuel Picard.
- However, the charges for this visit will be applied to John Smith's account.

Admit:

- Open the admission checklist which we will discuss later

Print label:

- Generate a label, suitable for cage cards as shown here



“Detail” tab:

Urgent:

- Check this box to make this appointment a priority. It will then be indicated in **red**.

Visit list

Still here    Veterinarian: All    Department: All    From: 20-Feb-2019

With departure    Status: All    Room: All    To: 20-Aug-2019

Id#	Ref#	Client	Patient	Species, breed	Reason	Assigned veterinarian	Status	Depar...	Room	Cage	Appol...	Arrival	Since	Note
▶ 24954		Smith, John	Tobby	Canine, English Toy...	Exam	Dolittle, John	External						17:45	

Reason:

- Enter the reason for the visit or select one of the drop-down menu. Go to **“Configuration” > “Tables” > “Visit reason”** to add more.

Urgent    Reason: Exam

Subjective: Consultation  
Convulsions  
Declaw  
Détartrage  
Diarrhée  
Emergency  
Exam

Reminder response:

Subjective:

- Enter additional notes for the appointment

Reason: Exam

Subjective: Nail trim

Reminder response:

- If there are any pending reminders for the animal, the system will display them by default.
- Reminders are listed in chronological order.
- User can click on multiple reminders to indicate that these reminders will be addressed in the visit.
- This will update the status for those reminders as complete.

Reminder response:	<input type="checkbox"/> Due date	Done date	Reminder type	Description
	<input type="checkbox"/> 01-Apr-2020		Anti-parasite reminder	
	<input type="checkbox"/> 03-May-2020		Annual vaccine booster	Rabies, 'Yearly'

Department:

- Allows you to specify the department for which the appointment is assigned.
- To add new department, go under **“Configuration” > “Tables” > “Department”**.

Department: Ophthalmology

- <N/A>
- Dentistry
- Exam
- Ophthalmology**
- Radiology Department
- Surgery
- waiting

Room:

- Allow you to specify in which room the animal ends up.
- To add new room, go under **“Configuration” > “Tables” > “Room”**.

Room: Exam room # 2

- <N/A>
- Exam room # 1
- Exam room # 2**
- Exame room # 3
- Kennel
- Waiting room

Cage:

- Allow you to indicate in which cage the animal is found.
- Beforehand, you must indicate a room for the animal.
- The cages displayed will be those assigned to the selected room.
- To add new cage, go under **“Configuration” > “Tables” > “Cage”**.

Cage: Carrier #1

- <N/A>
- Carrier #1**
- Carrier #2

Assigned veterinarian:

- Indicates the veterinarian who will be assigned to the visit.
- Your system may also be configured to require you to assign a Veterinarian upon creation of a visit. Go under **“Configuration” > “General options” > “Files”**.

Assigned veterinarian:

Regular veterinarian and establishment:

- User can indicate the animal’s regular Veterinarian and clinic (See point 1.1 of this module).
- Your system can be configured to require this information upon creation of a visit.
- Typically, this tab is used by reference center.

Regular veterinarian and establishment

Clinic:

Veterinarian:

Complete list  
 Specific list

Referral:

- Your system may also be configured to require referral information when a new visit is created.
- Select the **Referral** type from the drop-down menu.
- Use the “Search” button to indicate the client in the clinic that referred him.
- The referral types are setup under **“Configuration” > “Tables” > “Types” > “Referral”**.

Visit creation - Toby [40248] - Solutions Vet Inc. TEST 5.7

Weight:  (5,9 kg)  (13 lb) Body score:  Open date:  09:39:42

Create new client visit  Departure:

Note:

Owner(s):   
 Lachine, QC

Client:

Detail **Referral**

Type:

- <N/A>
- Ad
- Friends
- Internet
- Other Client
- Sign
- Veterinarian
- Yellow Pages



Visit summary - Client: Mr John Smith (24954)

Reason: Castration  
 Patient: Toby (Male, Canine, Altered, English Toy Spaniel)  
 Weight: 5,9 kg / 13 lb [BS:5] (23-Aug-2019)  
 Age: 9 mths

Veterinarian: Dr John Dolittle  
 Status: External Department: Surgery  
 Room: Kennel Cage: Kennel #1

Items to display  
 All  To-do  Transactions

D/S	Date	Init	Type	Cat...	Text(all)
>>	23-Aug-2019	pp	S		Assigned veterinarian: Dr John Dolittle No. 1998
	26-Aug-2019		P		Canine castration + Attachment (External PDF document - PDF): SURGERY AUTHORIZATION
	26-Aug-2019		P		Canine Castration - 6 to 10 kg CASTRATION
X	27-Aug-2019		P		Metacam susp. 1.5 mg/ml /bout 10ml X 27 Aug 2019 Ren.: 1 Qty: 1.0 -- Give 1 ml once a day, for days. Stop if you see any sign of vomiting, diarrhea or black stools.
>>	Sep 05 9:45 AM		P		Canine castration
\$	Sep 05 9:45 AM		P		Canine Castration - 6 to 10 kg CASTRATION
>>	Nov 26 10:56 AM	ML	*		File Reopen:Status: External

Visit history View Time  Real-time  Median 26-Nov-2019 10:56 Chronology Visit item Add/Insert Modify Delete Done / Sold

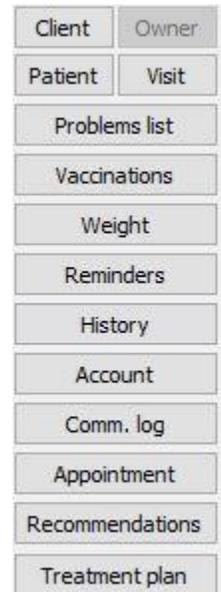
OK Save Close  
 Client Owner  
 Patient Visit  
 Problems list  
 Vaccinations  
 Weight  
 Reminders  
 History  
 Account  
 Comm. log  
 Appointment  
 Recommendations  
 Treatment plan  
 Group/Serv/Prod  
 Prescription  
 Estimate  
 Client sale  
 Admission  
 Discharge  
 Print  
 Invoice notes

- In the visit summary, you will find the visit reason, the animal name, weight and age. If a reminder has been associated with the visit, it will also be displayed as well as the animal's problems. Use the scroll bar to view information if necessary.
- Above this, you will see numbered tabs for each individual visit in the Medical file.
- You can click on the various tabs to review past visits.
- In the right section, you will also find the assigned veterinarian, the visit status, the department, the room and the cage. Note that at any time you can make changes in this field to track the movement of the patient in the clinic.
- The first entries for the new visit include any subjective notes entered when the new visit was created.
- For each entry, you will see the user's initials as well as the date and time of each inscription.
- VetWare allows multiple users to access and modify the same visit simultaneously.
- However, multiple users cannot modify the same transaction simultaneously. It is the last entry saved that will be kept.

### 3.2 Additional Info Buttons

On the right side, you will find the buttons which give you access to Additional information.

- **Client:** Opens the client information/details window.
- **Owner:** Displays the owner info used for that visit, if differs from the current Client.
- **Patient:** Opens the animal information/details window.
- **Visit:** Displays the visit creation information which the user can modify.
- **Problems list:** Displays the Problem List information (SMH) for the animal, allowing you to add and/or remove SMH. These SMH are also visible in the animal's summary.
- **Vaccinations:** Displays the Vaccination history for the animal. They are also visible in the animal summary.
- **Weight:** Displays the Weight curve for the animal.
- **Reminders:** Displays the Reminders for the animal. Also visible in the person summary.
- **History:** Displays client's transaction history (Details on the next pages).
- **Account:** Displays the client account information.
- **Comm. Log:** Displays the client's electronic communication history.
- **Appointment:** Displays the client's appointment(s). Also visible in the animal summary.
- **Recommendations:** Displays the animal recommendations window, allowing you to add and/or remove recommendations. This recommendation is also visible in the animal summary.
- **Treatment plan:** Allow you to add a treatment plan with "Smart Flow" (see module 27).



By clicking on the “History” button, you will have the details for the client’s transactions listed under the following tabs:

**Invoices:** Summary of previous invoices including dates, invoice number, total invoiced and amount owed, number of payment and date of the last payment.

Use the date selector to display more information, by default 2 years are displayed.

Client history [Smith, Mr John] - Solutions Vet Inc. TEST 5.7

From: 21-Aug-2017 To: 21-Aug-2019

Date	Invoice	Invoiced by	Total amount	Amount owed	Payments	Last payment
24-Jul-2019	273033	M. Solutions Vet	18,39 \$		1	24-Jul-2019
22-Jul-2019	273032	M. Solutions Vet	41,38 \$		1	22-Jul-2019
11-Jun-2019	273001	M. Solutions Vet	88,52 \$		1	11-Jun-2019
04-Jun-2019	272998	M. Solutions Vet	73,11 \$		1	04-Jun-2019
23-May-2019	272988	M. Solutions Vet	978,26 \$		1	23-May-2019

- You can also view the invoice details (and reprint if desired) by double clicking on the record, as shown below:

Client invoice - [24954] - Solutions Vet Inc. TEST 5.7

Client: Mr John Smith

Invoice No: 273001  
Date: 11-Jun-2019

Print patient photo  
 Print discount  
 Print reminders  
 Print notes

Coupon  
 Letter format

OneNote Print

Date	Qty	Description	Price
Sales			
11-Jun-2019	1,00	RC Vet. Diet Canine Adult Bag / 10 kg	76,99 \$

Applied date	Payment mode	Amount
11-Jun-2019	5 Visa	88,52 \$

Sub-total: 76,99 \$  
 GST (5 %): 3,85 \$  
 QST (9,975 %): 7,68 \$

**Total: 88,52 \$**

GST: 818030298 QST: 1214988484

**Payments:** Summary of payments and down-payments (amounts and payment types) including apply date, payment amount, rounding, payment mode, shift, invoice number, applied amount, down payment date and cashable date. Delete payment will be shown with an « \*\* ». You can include them or not by using the “Include deleted payments” box.

Client history [Smith, Mr John] - Solutions Vet Inc. TEST 5.7

Invoices **Payments** Prescriptions Estimates Sales transactions Client summary Online Boutique

Include deleted payments From: 21-Aug-2017 To: 21-Aug-2019

	Apply date	Payment	Rounding	Mode	Shift	Invoice	Applied amount	Down payment	Cashable
▶	21-Aug-2019	61,63 \$		5 Visa	5371	272998	61,63 \$		
	21-Aug-2019	100,00 \$		5 Visa	5371	272998	11,48 \$	01-Aug-2019	01-Aug-2019
						273041	88,52 \$		
	24-Jul-2019	18,39 \$		5 Visa	5371	273033	18,39 \$		
	22-Jul-2019	41,38 \$		4 Master Card	5371	273032	41,38 \$		
	11-Jun-2019	88,52 \$		5 Visa	5366	273001	88,52 \$		
	** 04-Jun-2019	(73,11 \$)		5 Visa	5371	272998	(73,11 \$)		
	** 04-Jun-2019	73,11 \$		5 Visa	5366	272998	73,11 \$		
	23-May-2019	978,26 \$		1 Debit Card	5366	272988	978,26 \$		

Delete payment... Close

**Prescriptions:** Shows a list of all prescriptions dispensed to the client including the animal’s name, visit number, date of the prescription, prescription number, renewal remaining, product description and status (Cancelled).

Client history [Smith, Mr John] - Solutions Vet Inc. TEST 5.7

Invoices Payments **Prescriptions** Estimates Sales transactions Client summary Online Boutique

Show only renewable prescriptions From: 21-Aug-2017 To: 21-Aug-2019

All animals

Patient	Visit	Date	Prescription	Renew...	Description	Status
▶ + Toby	3	21-Aug-2019	83697	0	Clavaseptin 62.5mg /co	Cancelled
+ Toby	1	08-May-2019	83672	0	Baytril 15mg /co	

To renew a prescription, reprint a label, cancel a prescription or view the dosage, simply double click on the prescription.

Client history [Smith, Mr John] - Solutions Vet Inc. TEST 5.7

Invoices Payments Prescriptions Estimates Sales transactions Client summary Online Boutique

Show only renewable prescriptions From: 21-Aug-2017 To: 21-Aug-2019

All animals

Patient	Visit	Date	Prescription	Ren...	Description	Status
+ Toby	3	21-Aug-2019	83700	2	Revolution 5.1-10kg brun /fiole	
+ Toby	3					
+ Toby	3					Cancelled
+ Toby	1					

Prescription refill - [83700] - Solutions Vet Inc. TEST 5.7

Prescription no.: 83700  
 Patient/Client: Toby/Mr John Smith(24954)  
 Product: Revolution 5.1-10kg brun /fiole  
 Veterinarian: Dr John Dolittle  
 Date created: 21 August 2019 11:11:41  
 Created by: M. Solutions Vet  
 Date filled: 21 August 2019 15:38:47

Dosage: Apply one dose at the back of the animal's neck once a month.

Include a warning message

Effective date: 21-Aug-2019 Expiry date: 30-Jun-2019 Renewable: 2 Quantity: 1,00 Price: 22,26 \$

Print label(s) Nb of label(s): 1

Fill location:  filled here  filled elsewhere

Buttons: Refill, Close, Cancel prescription, Print label(s)

**Estimates:** Displays a list of all estimates prepared for the client including the estimate date, estimate number, animal name, estimate description and the amount.

Client history [Smith, Mr John] - Solutions Vet Inc. TEST 5.7

Invoices Payments Prescriptions **Estimates** Sales transactions Client summary Online Boutique

From: 21-Aug-2017 To: 21-Aug-2019

Date	Estimate	Patient	Description	Amount
21-Aug-2019	9783	Tobby	Castration	195,46 \$

Double click to view the estimate, to reprint it or to delete it.

Client history [Smith, Mr John] - Solutions Vet Inc. TEST 5.7

Invoices Payments Prescriptions Estimates Sales transactions Client summary Online Boutique

From: 21-Aug-2017 To: 21-Aug-2019

Date	Estimate	Patient	Description	Amount
21-Aug-2019	9783	Tobby	Castration	195,46 \$

Estimate - 9783 - Solutions Vet Inc. TEST 5.7

Display only transactions for this visit  Display only items to do

Date	Qty	Description	Amount
Planned, Total: 170,00 \$			
Tobby , Total: 170,00 \$			
Visit: 004, Total: 170,00 \$			
Vet: Dr John Dolittle, Total: 170,00 \$			
21-Aug-2019	1,00	Canine castration	
21-Aug-2019	1,00	Canine Castration - 6 to 10 kg	170,00 \$
21-Aug-2019	1,00	Nail trimming (courtesy) - Standard	0,00 \$

Snapshot: Castration Saved on 21-Aug-2019 15:49

Date and time: 21-Aug-2019 16:41

Actual price Approximate

Sub-total:	170,00 \$
GST (5 %):	8,50 \$
QST (9,975 %):	16,96 \$
<b>Total:</b>	<b>195,46 \$</b>

Printing options

Print the patient's picture Printer: OneNote Print

Print an approval/authorization/notes text in the bottom of the page Font size: 11

Any anesthetic, surgical or medical intervention, however minor, entails a certain risk, however minimized by knowledge and techniques.

I authorize this veterinary institution to practice the intervention(s) listed above or any other intervention necessary depending on the

Delete Close

**Sales Transactions:** Review all products and/or services sold to the account including the animal name, transaction's date, quantity, description, visit number, suggested price, discounted price and sale price.

- Users can select a category, desired date range and choose either the Products or Services tab in the upper part of the window.

Patient	Date	Qty	Description	Visit No.	Suggested ...	Discounted...	Sale price
	11-Jun-2019	1,00	RC Vet. Diet Canine Adult Bag / 10 kg		76,99 \$	76,99 \$	76,99 \$
Tobby	21-Aug-2019	1,00	Revolution 5. 1-10kg brun /fiole	3	22,26 \$	22,26 \$	22,26 \$
Tobby	21-Aug-2019	1,00	Revolution 5. 1-10kg brun /fiole	3	22,26 \$	22,26 \$	22,26 \$
Tobby	21-Aug-2019	1,00	Bravecto orange 4.5-10kg /co	3	55,02 \$	55,02 \$	55,02 \$
Tobby	21-Aug-2019	28,00	Clavaseptin 62.5mg /co	3	29,36 \$	29,36 \$	29,36 \$
Tobby	24-Jul-2019	1,00	RC Vet. Diet Canine Adult Small Dog Bag / 1.5 kg		15,99 \$	15,99 \$	15,99 \$
Tobby	22-Jul-2019	1,00	RC Vet. Diet Canine Adult Small Dog Bag / 4 kg		35,99 \$	35,99 \$	35,99 \$
Tobby	04-Jun-2019	1,00	Prescription Diet Canine t/d Bag/15 lb		63,59 \$	63,59 \$	63,59 \$
Tobby	23-May-2019	1,00	RC Vet. Diet Canine Adult Bag / 4 kg		35,99 \$	35,99 \$	35,99 \$
Tobby	21-May-2019	1,00	idexx lab demo - chem (internal)	1	75,00 \$	75,00 \$	75,00 \$
Tobby	21-May-2019	1,00	IDEXX Blood tests - IDEXX Biochemical EXT1 (With S...	1	115,00 \$	115,00 \$	115,00 \$
Tobby	21-May-2019	1,00	IDEXX Blood tests - IDEXX Biochemical EXT1 (With S...	1	115,00 \$	115,00 \$	115,00 \$
Tobby	21-May-2019	1,00	IDEXX Blood tests - IDEXX Biochemical EXT1 (With S...	1	115,00 \$	115,00 \$	115,00 \$
Tobby	16-May-2019	1,00	idexx lab demo - T4 (external)	1	80,00 \$	80,00 \$	80,00 \$
Tobby	16-May-2019	1,00	IDEXX Blood tests - IDEXX Biochemical EXT1 (With S...	1	115,00 \$	115,00 \$	115,00 \$

**Client Summary:** Displays the following client information:

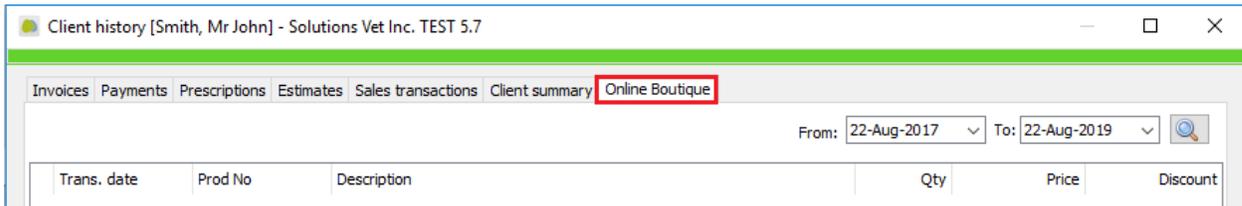
- Last statement date
- Last visit date
- Number of visits
- Total receivable (current account balance)
- Total revenue by month

Year	Month	Revenue	Number of invoices
2019	August	76,99 \$	1
2019	July	51,98 \$	2
2019	June	140,58 \$	2
2019	May	850,85 \$	1

Total: 1 120,40 \$

**Online Boutique:** Displays the following client information from the online boutique purchase. For more information see the module 29.

- Transaction date
- Supplier product number
- Product description
- Quantity sold
- Unit sale price
- Discount



### 3.3 Working in the Medical File

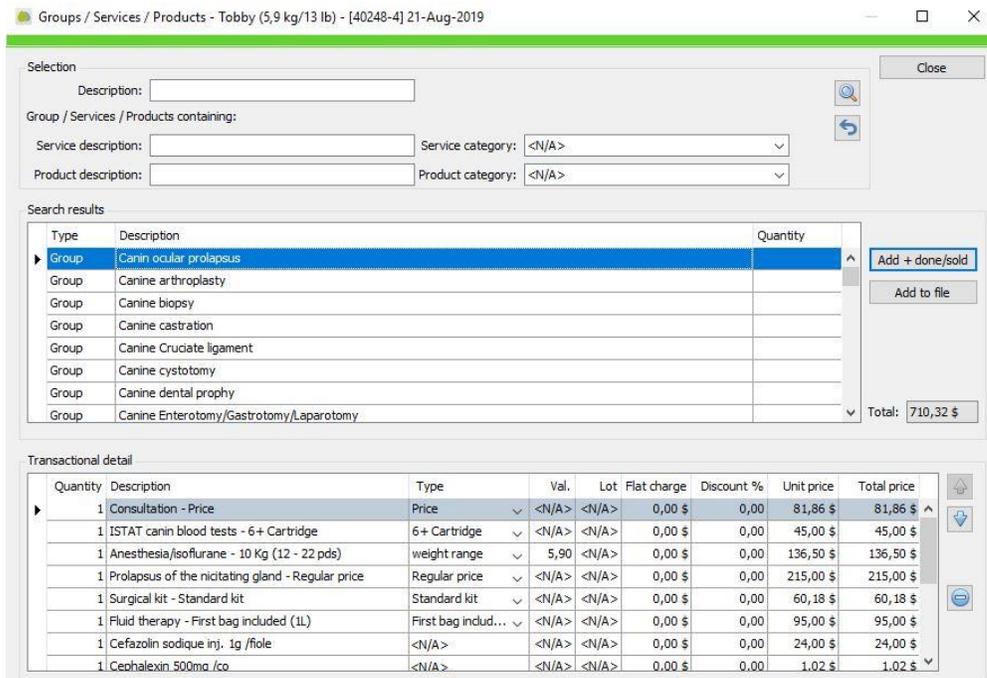
Within the medical file are the following **Actions** buttons:



#### 3.3.1 Grp/Serv/Prod - Group/Service/Product

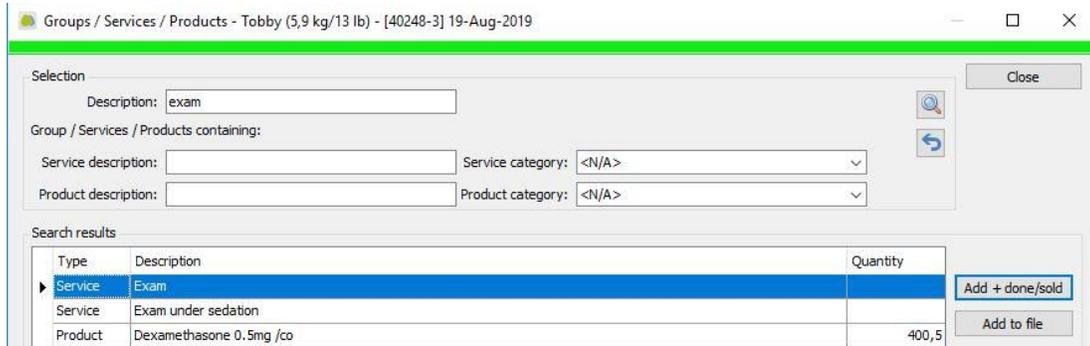
Group/Serv/Prod

This is where you will select the various catalog items for the medical file.

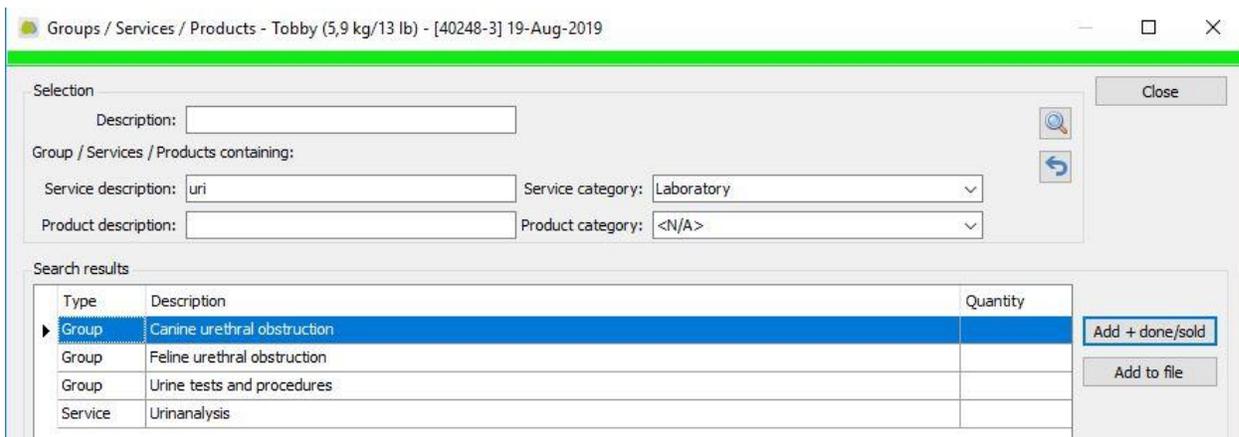


Description:

- Using the **Description field** at the top, you can search across **Products, Services and Groups**.
- VetWare search to “**match any**”, meaning find *anywhere* in the description, whatever is in the search field.
- In the example below, the system will find all items in the catalog that have “exam” anywhere in the description.



- In the second section, you can add specific search criteria to narrow the results.
- Using the same concept as described above, you may enter your description criteria into either **the Service or Product field**.
- In the following example, we have narrowed the search results by specifying services from the Laboratory revenue category containing “uri” in the description.



- To perform your search, click on the 
- To clear your search criteria, click on the 

Transactional detail:

- Once you click on a **Group, Service or Product**, the associated price schedule will appear in the grid at the bottom.
- You can apply a discount and/or manually change the **Total Price**.
- The price schedule display depends upon how the service was configured in the catalog.
- If each item was defined as **Unit type**, you can click on the Type from the drop-down menu and choose the appropriate price schedule item.

Transactional detail

Quantity	Description	Type	Val.	Lot	Flat charge	Discount %	Unit price	Total price
1	Consultation - Price	Price	<N/A>	<N/A>	0,00 \$	0,00	81,86 \$	81,86 \$

Price  
Short exam / reev.  
Long  
Technical consultation

- Change the **Quantity** if you are selling more than one unit, and press **Enter** to update the price.

Transactional detail

Quantity	Description	Type	Val.	Lot	Flat charge	Discount %	Unit price	Total price
1	Consultation - Price	Price	<N/A>	<N/A>	0,00 \$	0,00	81,86 \$	81,86 \$

Price  
Short exam / reev.  
Long  
Technical consultation

- If the service price schedule was defined by **Weight Range**, the system will suggest which item in the price schedule applies to the animal, based on its current weight (shown in the **Value** column).

Transactional detail

Quantity	Description	Type	Val.	Lot	Flat charge	Discount %	Unit price	Total price
1	Canine Castration - 6 to 10 kg	weight range	5,90	<N/A>	0,00 \$	0,00	170,00 \$	170,00 \$

- Likewise, if the price schedule was defined by **Time range**, enter the time in the **Value field** and the appropriate price will be displayed.

Transactional detail

Quantity	Description	Type	Val.	Lot	Flat charge	Discount %	Unit price	Total price
1	Oral surgery - 15 to 20 min.	time range	20	<N/A>	0,00 \$	0,00	150,00 \$	150,00 \$

- If you have selected a Group, all the **Products and Services** tied to the Group are displayed in the grid.
- For each item, you can modify the quantity or value as outlined above.
- You can re-order the items and/or remove items from the group before adding to the file.

Transactional detail

Quantity	Description	Type	Val.	Lot	Flat charge	Discount %	Unit price	Total price
1	Canine Castration - 6 to 10 kg	weight range	5,90	<N/A>	0,00 \$	0,00	170,00 \$	170,00 \$
0	Acépromazine inj. 25 mg/ml /au ml	<N/A>	<N/A>	<N/A>	<N/A>	0,00	<N/A>	<N/A>
0	Glycopyrrrolate inj. 0.2mg/ml /au ml	<N/A>	<N/A>	<N/A>	<N/A>	0,00	<N/A>	<N/A>
0	Butorphanol inj. (Torbugesic) /au ml	<N/A>	<N/A>	<N/A>	<N/A>	0,00	<N/A>	<N/A>
0	Metacam inj. 0.5% /au ml	<N/A>	<N/A>	<N/A>	<N/A>	0,00	<N/A>	<N/A>
1	Nail trimming (courtesy) - Standard	Standard	<N/A>	<N/A>	0,00 \$	0,00	0,00 \$	0,00 \$

Once you have selected the **Group, Service and/or Product**, click **Add + done/sold** or **Add to file**.

- **Add + done/sold:** Implies that the work has been or is being done. As such, the system will adjust inventory values, create associated reminders and add the charges to the client's account.
- **Add to file:** Indicates the work has not yet been done. Use this option when preparing an Estimate or laying out a Treatment plan for the patient.

Search results

Type	Description	Quantity
Group	Canine castration	
Group	Feline castration	
Service	Canine Castration	

Total: 170,00 \$

- The first column in the Medical File (D/S) shows visual hash marks (>>) to indicate which transactions are Done/Sold.

You can also use the radio buttons in the upper left to show either:

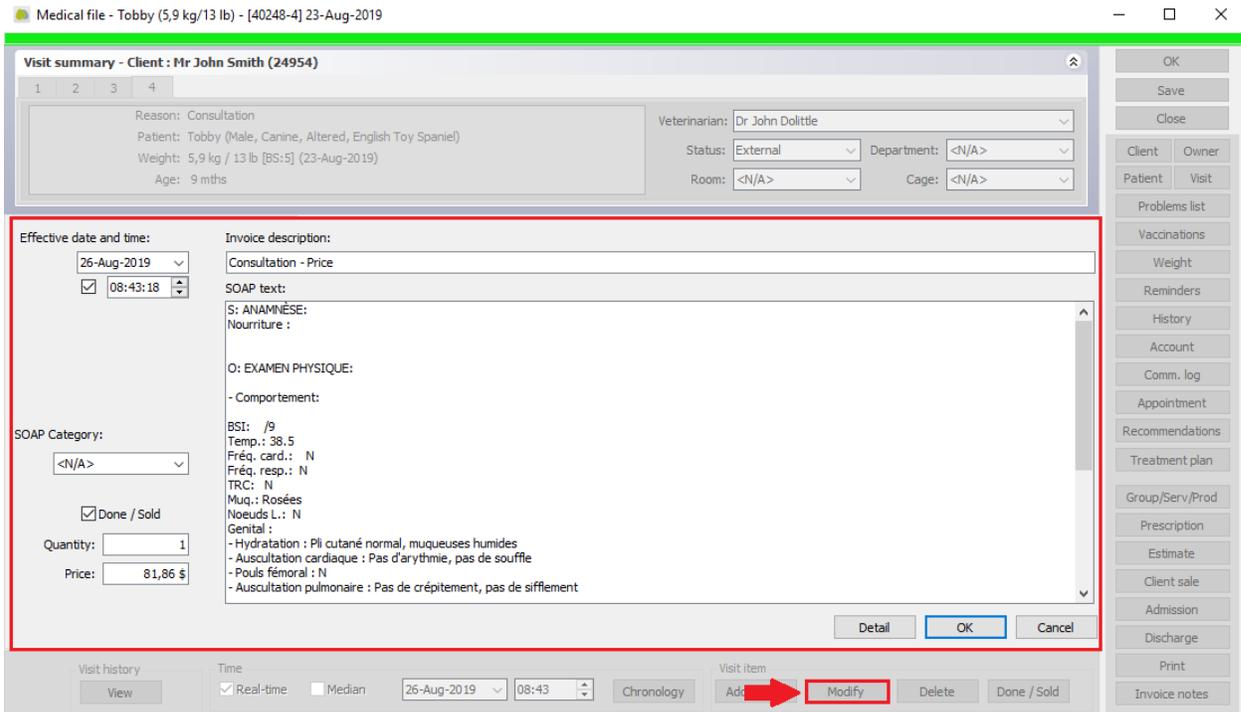
- **All:** Displays all entries including the Assigned vet, weight and subjective notes.
  - **To Do:** Displays any transactions that are not yet Done/Sold as well as all attachment of the visit.
  - **Transactions:** Displays transactions only.
- Once the procedure has been done, users can indicate this by clicking on the transaction then clicking on the **Done / Sold** button at the lower right.

- Alternately, you could double click on the transaction and place a check mark in the Done / Sold box as shown below:

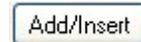
**Note:** when a transaction is changed to Done/Sold, the revenue will be tied to the veterinarian who added it to the visit, as opposed to whichever veterinarian is currently assigned to the case.

### 3.3.2 S.O.A.P. Text

- A SOAP text may be tied to a service, so it is inserted automatically into the medical file.
- To modify the text, either double-click on the service, or any line of SOAP text.
- Alternately, you can click to select the transaction, and then click on Modify.
- The SOAP text appears in an embedded window, which is fully editable.
- Likewise, you can add medical notes at any time by selecting a transaction and clicking on **Add/Insert**. Note that a SOAP test can always be modified even if the visit is “closed”.



- From this window, users can also modify any of the following:



- SOAP text.
- Invoice description.
- Transaction Date (date cannot be set earlier to the visit creation date).
- Transaction Time (can be changed or suppressed by removing the check mark).
- Done/Sold (transaction can be changed from or to Done/Sold status).

- The **Details** button displays all the information tied to the transaction, as shown below:

SOAP Detail

SOAP type	P
Entry type	PR [682567,4096,0x2]
Identification number	<N/A>
Invoice description	Consultation - Price
Quantity	1
Sale price	81,86 \$
Discounted sale price	81,86 \$
Suggested sale price	81,86 \$
Veterinarian assigned to the visit	Dr John Dolittle
Entered by	M. Solutions Vet
Done/sold by	Dr John Dolittle
Entry date	2019-08-26 08:43:18
Effective date	2019-08-26 08:43:18

Close

- To delete a transaction from the medical file, select it, and then click **Delete**.
- The transaction as well as the associated SOAP text will be deleted.
- You can select multiple transactions simultaneously by left clicking and dragging the cursor up or down to highlight multiple transactions.

- The arrow symbol  to the upper right of the visit will drop down the "Visit summary", as shown below:

Medical file - Toby (5,9 kg/13 lb) - [40248-4] 23-Aug-2019

Visit summary - Client : Mr John Smith (24954)

Reason: Consultation  
 Patient: Toby (Male, Canine, Altered, English Toy Spaniel)  
 Weight: 5,9 kg / 13 lb [BS:5] (23-Aug-2019)  
 Age: 9 mths

Veterinarian: Dr John Dolittle  
 Status: External  
 Department: <N/A>  
 Room: <N/A>  
 Cage: <N/A>

Items to display  
 All  To-do  Transactions

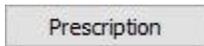
D/S	Date	Initi...	Type	Cat...	Text(all)
>>	Aug 23 4:17 PM	pp	S		Assigned veterinarian: Dr John Dolittle No. 1998
>>	Aug 23 4:19 PM	P	P		Complete blood biochemistry - Standard price
>>	Aug 26 8:43 AM		P		Consultation - Price

OK  
 Save  
 Close  
 Client Owner  
 Patient Visit  
 Problems list  
 Vaccinations  
 Weight  
 Reminders  
 History  
 Account

- The user may select how each transaction is date and time stamped when added to the medical file.

- **Real Time:** Selected by default, each entry is stamped with the current date and time in accordance with the local computer settings.
- **Median:** Allows the user to manually set a date and time for the transaction entry and/or set a selected group of transactions to the median date and time (see also, Chronology section below).

### 3.3.3 Prescription



- In order to write a prescription, the user must be in the medical file, on a visit where the status is not closed. Click on **“Prescription”**. Only users who are veterinarians can access the prescriptions function unless you have enabled the "Use the vet assigned to visit for all medical file inscription" option under Configuration > General options > Files.

Description	Lot #	Quantity	Flat charge	Unit price
Clavamox gouttes 15ml		3		39,92 \$
Clavaseptin 250mg /co		168		2,06 \$
Clavaseptin 500mg /co		0		3,62 \$
Clavaseptin 50mg /co		32		0,52 \$
▶ Clavaseptin 62.5mg /co		106		0,62 \$
Amoxi-clav 250/125mg /co		37,5		1,88 \$
Amoxi-clav 500/125mg /co		-288,5		1,34 \$

1. Search for the product by description and/or category or with a bar-code scanner properly configured.
2. Click on  to perform the search. Use the  icon to clear your search criteria and start over.
3. Select the medication from the Search results list.
4. Enter the dose, frequency and duration.
5. Note: the prescription text is created automatically. You can modify this text and add additional instructions if required. If a text has been saved in the product catalog under the "label configuration" it will be displayed by default. See module 3 (catalog) for more details.
6. The expiry date will be set based on the expiry date of the product, or your system setting (Number of expiry days by default, under "**Configuration**" > "**General Options**" > "**Other options**"). The product expiration date will be applied first.
7. You may select or unselect the Prescription fee charge.
8. "**Calculate**" will automatically calculate the number of tablets, mls, etc., required to fill the prescription as well as generate the total cost for the prescription. Here, you also have the option of applying a percentage discount.
9. Enter the number of refills, if applicable.
10. Fill and/or Print.
  - Once a prescription is indicated as filled, the system will adjust the inventory quantity and charge the medication to the client's account.
  - If the prescription was added to file (not filled), the user may select the transaction in the medical file later and click **Done / Sold** which will display the prescription window where they can print the label and/or indicate that it has been filled.
  - Alternately, staff can complete the prescription (fill it and print the label) from the Prescription list, which we will discuss in section 4.
  - "**Print**" will generate a prescription label when the user exits the Prescription form.
11. **Filled Here/Filled Elsewhere:** If user selects **Filled Elsewhere**, inventory will not be adjusted but the prescription will still be entered in the medical file. This option implies that the veterinarian will be issuing a prescription which the client will fill at a third party pharmacy. Only the prescription fee will be charged to the client. To adjust this fee, go under "**Catalog**" > "**Service**" > "**Prescription**".
12. **Warning message:** Add a warning message on the prescription if applicable. To add a new warning message, go into "**Configuration**" > "**Table**" > "**Warning message**".

### 3.3.4 Estimate Estimate

Estimates are also prepared from within the medical file (you must be in a visit where the status is not closed).

- Use the **Group/Serv/Prod** button to select the products and services as outlined previously.
- Choose the option **Add to file** (not Add + Done/Sold).
- Once you have completed the Estimate, click on the **“Estimate”** button in the medical file.

Estimate - [new] - Solutions Vet Inc. TEST 5.7

Display only transactions for this visit       Display only items to do

Date	Qty	Description	Amount
+ Done / sold, Total: 81,86 \$			
+ Planned, Total: 170,00 \$			
+ Other transactions, Total: 37,99 \$			

The Estimate is presented as follows:

- **Done /Sold:** Displays any transactions in the current visit which have been done (as such, the client is responsible for these financial amounts).

Estimate - [new] - Solutions Vet Inc. TEST 5.7

Display only transactions for this visit       Display only items to do

Date	Qty	Description	Amount
+ Done / sold, Total: 81,86 \$			
- Toby , Total: 81,86 \$			
- Visit: 004, Total: 81,86 \$			
- Vet: Dr John Dolittle, Total: 81,86 \$			
26-Aug-2019	1,00	Consultation - Price	81,86 \$
+ Planned, Total: 170,00 \$			
+ Other transactions, Total: 37,99 \$			

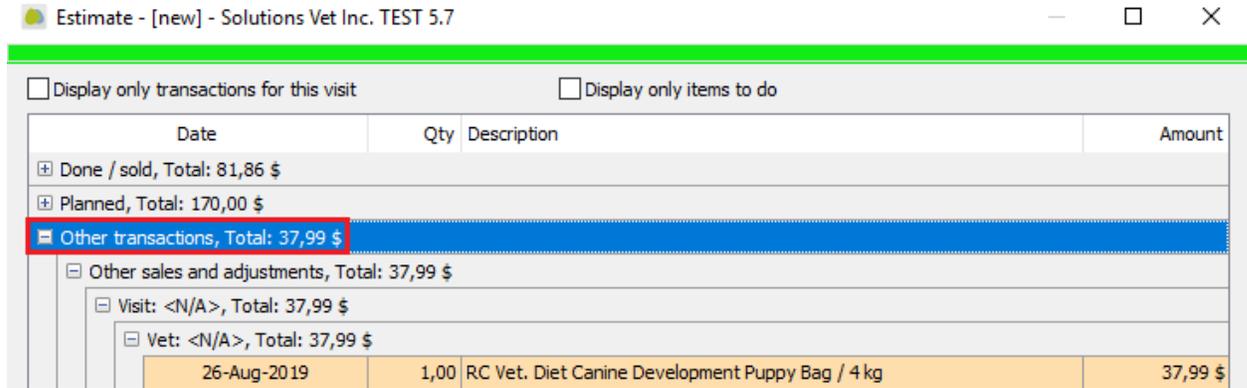
- **Planned:** Lists all the items in the estimate (Add to file).

Estimate - [new] - Solutions Vet Inc. TEST 5.7

Display only transactions for this visit       Display only items to do

Date	Qty	Description	Amount
+ Done / sold, Total: 81,86 \$			
+ Planned, Total: 170,00 \$			
- Toby , Total: 170,00 \$			
- Visit: 004, Total: 170,00 \$			
- Vet: Dr John Dolittle, Total: 170,00 \$			
26-Aug-2019	1,00	Canine castration	
26-Aug-2019	1,00	Canine Castration - 6 to 10 kg	170,00 \$
26-Aug-2019	0,05	Acépromazine inj. 25 mg/ml /au ml	
26-Aug-2019	0,20	Glycopyrrolate inj. 0.2mg/ml /au ml	
26-Aug-2019	0,05	Butorphanol inj. (Torbugesic) /au ml	
26-Aug-2019	0,02	Metacam inj. 0.5% /au ml	
26-Aug-2019	1,00	Nail trimming (courtesy) - Standard	0,00 \$
+ Other transactions, Total: 37,99 \$			

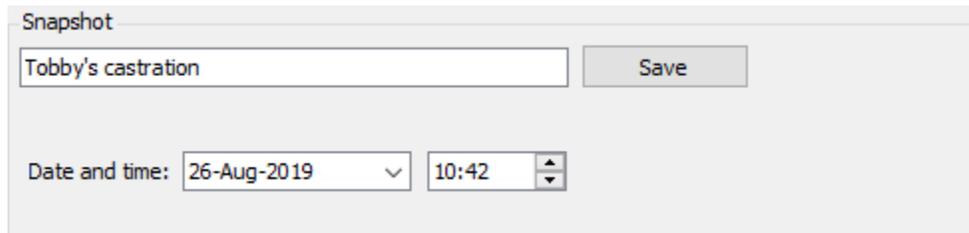
- **Other transactions:** Displays all other transactions for which the client must pay. These include all non-invoiced Done/Sold transactions from any of the client's animals.



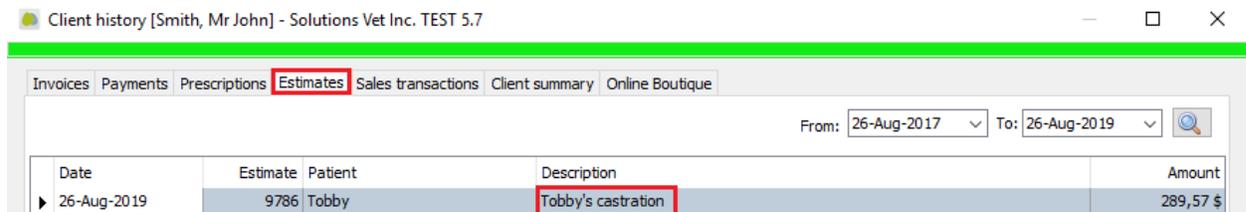
To remove this section, click the check box in the upper left corner of the Estimate window: **“Display only transactions for this visit”**. To hide all the transactions already done, click on the box **“Display only items to do”**.

Bottom section:

**Snapshot:**



Enter the description of the estimate (ex: Tobby's castration). Click “Save” to save the estimate into the client's history.



You can change the date and time of the estimate if desired.

**Actual price vs Approximate:**

<b>Actual price</b>	Approximate
Sub-total:	170,00 \$
GST (5 %):	8,50 \$
QST (9,975 %):	16,96 \$
<hr/>	
Total:	195,46 \$

Actual price	<b>Approximate</b>
Minimum amount	<input type="text" value="150 \$"/>
Maximum amount	<input type="text" value="200 \$"/>
<input checked="" type="checkbox"/> Print prices, where applicable	

- By selecting "Actual price", it will be displayed on the estimate.

By selecting "Approximate" price it will be displayed on the estimate in addition to the actual price.



**Solutions Vet Inc. TEST 5.7**  
2999 boul. Choquette  
St-Hyacinthe, QC J2S 7C2  
Phone: (877)636-5999

**Estimate**

Date: 26-Aug-2019  
GST: 81803038 GST: 1214988484

Mr John Smith 24954 / R218398  
1245 piedg

Date	Qty	Description	Amount
<b>Planned</b>			
<b>Tobby 40248</b>			
<b>Visit: 004</b>			
26-Aug-2019	1.00	Canine castration	170,00 \$
	1.00	Canine Castration - 6 to 10 kg	
	0.05	Acipromazine inj. 25 mg/ml /au ml	
	0.20	Glycopyrolate inj. 0.2mg/ml /au ml	
	0.05	Butorphanol inj. (Torbugesic) /au ml	
	0.02	Melacem inj. 0.5% /au ml	
	1.00	Nail trimming (courtesy) - Standard	0,00 \$
			170,00 \$
<b>Sub-total</b>			170,00 \$
GST (5,000%):			8,50 \$
QST (9,975%):			16,96 \$
<b>Total:</b>			195,46 \$

Any anesthetic, surgical or medical intervention, however minor, entails a certain risk, however minimized by knowledge and techniques

I authorize this veterinary institution to practice the intervention(s) listed above or any other intervention necessary depending on the condition of the animal and the good judgment of the veterinarian. The owner of the animal agrees to pay the account relating to it, as soon as he regains possession of it.



**Solutions Vet Inc. TEST 5.7**  
2999 boul. Choquette  
St-Hyacinthe, QC J2S 7C2  
Phone: (877)636-5999

**Estimate**

Date: 26-Aug-2019  
GST: 81803038 GST: 1214988484

Mr John Smith 24954 / R218398  
1245 piedg

Date	Qty	Description	Amount
<b>Planned</b>			
<b>Tobby 40248</b>			
<b>Visit: 004</b>			
26-Aug-2019	1.00	Canine castration	170,00 \$
	1.00	Canine Castration - 6 to 10 kg	
	0.05	Acipromazine inj. 25 mg/ml /au ml	
	0.20	Glycopyrolate inj. 0.2mg/ml /au ml	
	0.05	Butorphanol inj. (Torbugesic) /au ml	
	0.02	Melacem inj. 0.5% /au ml	
	1.00	Nail trimming (courtesy) - Standard	0,00 \$
			170,00 \$
<b>Sub-total</b>			170,00 \$
The total amount may be in this range:			Minimum amount: 150,00 \$
			Maximum amount: 200,00 \$

Any anesthetic, surgical or medical intervention, however minor, entails a certain risk, however minimized by knowledge and techniques

I authorize this veterinary institution to practice the intervention(s) listed above or any other intervention necessary depending on the condition of the animal and the good judgment of the veterinarian. The owner of the animal agrees to pay the account relating to it, as soon as he regains possession of it.

By selecting “Approximate” price it will be displayed on the estimate in addition to the actual price.

- If the user uncheck the box “Print prices, where applicable” only the approximate price will be displayed.

Actual price Approximate

Minimum amount

Maximum amount

Print prices, where applicable

**Solutions Vet Inc. TEST 5.7**  
 2999 boul. Choquette  
 St-Hyacinthe, QC J2S 7C2  
 Phone: (877)636-5999

**Estimate**

Date: 26-Aug-2019  
 GST: S18030298 GST: 1214988484

---

**Mr John Smith 24954 / R218398**  
 1245 piedg

Date	Qty	Description
<b>Done / sold</b>		
<b>Tobby 40248</b>		
<i>Vet.: Dr John Doolittle</i>		
Visit: 004		
26-Aug-2019	1,00	Consultation - Price
<b>Planned</b>		
<b>Tobby 40248</b>		
<i>Vet.: Dr John Doolittle</i>		
26-Aug-2019	1,00	Canine castration
	1,00	Canine Castration - 6 to 10 kg
	0,05	Acépromazine inj. 25 mg/ml /au ml
	0,20	Glycopyrrolate inj. 0.2mg/ml /au ml
	0,05	Butorphanol inj. (Torbugesic) /au ml
	0,02	Metacam inj. 0.5% /au ml
	1,00	Nail trimming (courtesy) - Standard
<b>Other transactions</b>		
26-Aug-2019	1,00	RC Vet. Diet Canine Development Puppy Bag / 4 kg

The total amount may be in this range: Minimum amount: 150,00 \$  
Maximum amount: 200,00 \$

**Printing options:**

**Printing options**

Print the patient's picture Printer: OneNote

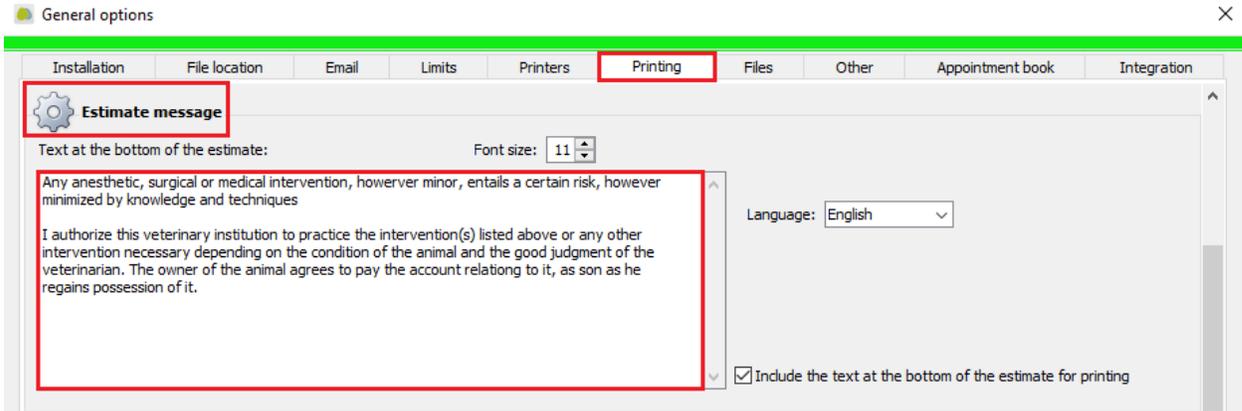
Print an approval/authorization/notes text in the bottom of the page Font size: 11

Any anesthetic, surgical or medical intervention, however minor, entails a certain risk, however minimized by knowledge and techniques

I authorize this veterinary institution to practice the intervention(s) listed above or any other intervention necessary depending on the

- By default, the animal's picture will print on the estimate, unless the user removes the check mark in the upper left (“Print the animal's picture”).
- Click Print to print the estimate for the client.

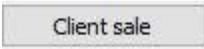
- By default, the approval/authorization/notes will print on the estimate, unless the user removes the check mark **“Print an approval/authorization/notes text in the bottom of the page”**. To enter automatically a text, go under **“Configuration” > “General options” > “Printing” > “Estimate message”**.



- Use  to erase all authorization text from the box in order to write your own note.
- Use  to reset authorization text.
- When you are finished, you may choose to delete the transactions or keep them in the visit, thereby making the estimate a part of the animal’s medical file.
- If the work is done later, you could re-open the visit and indicate the items as Done/Sold, noting the revenues would be tied to the veterinarian who initially prepared the estimate, as opposed to the veterinarian assigned to the case.
- Alternately, you may choose to open a new visit and re-enter the transactions when the treatment is done.

D/S	Date	Initi...	Type	Cat...	Text(all)
					- Pose d'une pince fergusson sur le pédicule du testicule sur sa portion proximale - Pose d'une hémostatique cryle au dessus de la fergusson - Incision entre la cryle et la fergusson pour exciser le testicule - Ligature trans-fixée du pédicule (technique fermée) Vicryl-0 ou Vicryl 2-0 - Ligature simple ajoutée en dessous Vicryl 0 ou 2-0 - Même procédure appliquée au testicule droit - Fermeture sous-cutanée au Vicryl 2-0 ou 3-0 - Fermeture de la peau Éthilon 3-0 ou 4-0
	Aug 26 10:04 AM		P		Acépromazine inj. 25 mg/ml /au ml, Qty:0,05
	Aug 26 10:04 AM		P		Glycopyrrolate inj. 0.2mg/ml /au ml, Qty:0,2
	Aug 26 10:04 AM		P		Butorphanol inj. (Torbugesic) /au ml, Qty:0,05
	Aug 26 10:04 AM		P		Metacam inj. 0.5% /au ml, Qty:0,02
	Aug 26 10:04 AM		P		Nail trimming (courtesy) - Standard
>>	Aug 27 9:41 AM	pp	S		Estimate: (9788) 195,46 \$ by Solutions Vet

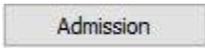
### 3.3.5 Client Sale



This button is found in the medical file, as well as in the search screen.

- The purpose of **Client Sale** is to allow you to sell Products to the client outside of the medical file.
- For example, if the client purchases food regularly, you may prefer to keep those transactions externally from the animal’s medical file.
- Items sold under **Client Sale** are still immediately tagged to their account and can be seen from the **Sales Transactions** tab from History.
- It is suggested to select the animal to whom this sale is intended to ensure better follow-up and to optimize the generation of reminder batch.
- Client sale will display all **Products** (except Prescriptions, Controlled substances or “Only for group”).
- To avoid errors, we recommend that you scan the product with a bar code scanner. You can also enter a description and select item from the drop-down menu.
- Enter the **Qty** (quantity you are selling). By default, when the item will be scanned or selected the displayed quantity will be “1”.
- The **“History”** button displays the previous sales transactions.
- Use the Category filter or set a date range if desired, then click Search .
- If you locate the product from history, simply double click on it to load it to the “Client sale” form.
- By default, the option **“Go to the client’s account”** is checked. However, if you are in the medical file, you will be returned to the medical file upon completion of the Client sale.
- Use the  icon to remove a selected item from the sales list.

### 3.3.6 Admission



The “Admission” button opens an **Admission checklist** form where the staff can record any items that are being left at the clinic by the owner.

Admission checklist [40248-4]

Admit / Hospitalize this patient

Weight:  (5,9 kg)  (13 lb) Body score:

List template: Default checklist

Reminder: <N/A> Days:

Checklist:

Item	OK	N/A	Note
▶ Referring Veterinarian X-Rays	<input type="checkbox"/>	<input type="checkbox"/>	
Medication	<input type="checkbox"/>	<input type="checkbox"/>	
Food	<input type="checkbox"/>	<input type="checkbox"/>	
Personal items	<input type="checkbox"/>	<input type="checkbox"/>	
Transporter/Cage	<input type="checkbox"/>	<input type="checkbox"/>	
Insurance form to be filled in	<input type="checkbox"/>	<input type="checkbox"/>	
Planned services or care	<input type="checkbox"/>	<input type="checkbox"/>	
Follow-up with regular veterinari...	<input type="checkbox"/>	<input type="checkbox"/>	
Other	<input type="checkbox"/>	<input type="checkbox"/>	

Telephone choices:

Select	#	Type	Number	Extension	Note
<input type="checkbox"/>		Cellular	(514)555-3333		
<input type="checkbox"/>		Work	(450)555-4087		
* <input checked="" type="checkbox"/>					

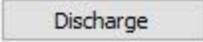
Department: <N/A> Room: <N/A>

Assigned vet.: Dr John Dolittle Cage: <N/A>

Other functions available from this form include:

- **Admit / Hospitalize this patient** will update the animal/visit status to “Hospitalized”.
- **Weight and/or Body score** entry.
- Set a **Reminder** for the animal.
- Checklist of items being left or needing attention while animal is hospitalized.
- Items that are **not applicable** are **greyed out**.
- Items that are **applicable** appear in **black**
- Items that have **not been addressed** by the admitting staff appear in **red**.
- Notes can be added to each item.
- Telephone numbers to contact the client.
- Assign the animal to a Department, Veterinarian, Room and/or Cage.

### 3.3.7 Discharge



The “Discharge” checklist displays the list of items that were selected upon admission.

Discharge checklist [40248-4] ✕

Discharged OK

Departure:  27-Aug-2019 Cancel

Checklist:

Item	OK	N/A	Note
▶ <b>Food</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Personal items</b>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Blue blanket and black&amp;red collar</b>
<b>Transporter/Cage</b>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Grey with ID tag</b>
<b>Insurance form to be filled in</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Planned services or care</b>	<input type="checkbox"/>	<input type="checkbox"/>	

- Clicking on the **Discharged check box** will update the animal/visit status to “Released”.
- Using the **Departure check box**, staff can indicate that the animal has gone home and/or modify the departure date.
- As items in the checklist are checked off, they appear black, while items that have not been addressed remain in red.

Discharge checklist [40248-4] ✕

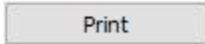
Discharged OK

Departure:  27-Aug-2019 Cancel

Checklist:

Item	OK	N/A	Note
Medication	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Metacam
<b>Food</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Personal items</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>Blue blanket and black&amp;red collar</b>
<b>Transporter/Cage</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>Grey with ID tag</b>
<b>Insurance form to be filled in</b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Planned services or care</b>	<input type="checkbox"/>	<input type="checkbox"/>	
▶ Follow-up with regular veterinarian	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

### 3.3.8 Print



Here the user may print the medical file, Word documents and labels.

Note: to print the complete medical file for an animal, select the animal and click Print from the Search window.

#### Medical File:

Printing of documents and labels

Medical file Word document Label

Medical file (complete)  
 Date from: 06-May-2019 to: 27-Aug-2019

Options  
 Print an empty page  
 Print at least half a page of empty lines  
 Print the patient's picture (if available)  
 Number of copies: 1

Language: English  
 Printer: OneNote

Print Close

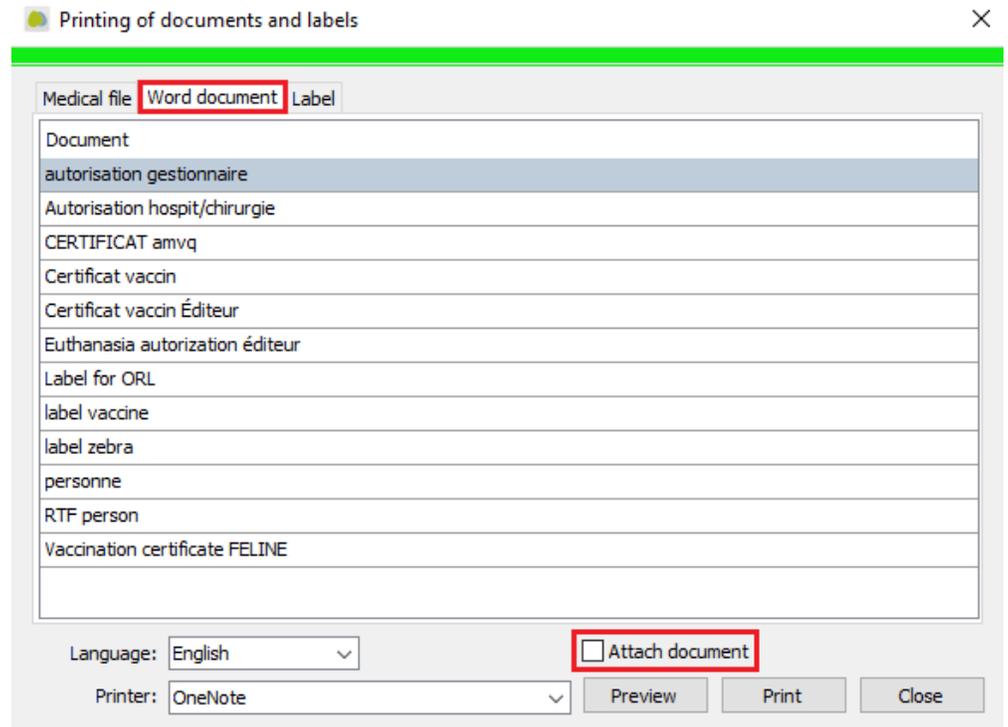
#### Print an empty page:

- Generates a page of empty lines which can be used for hand-written notes.
- Animal number and client reference number (if available) appear at the top.
- Next section includes full animal information, followed by client information.
- The rest of the page is lined with columns for date and description.

#### Medical file [40248 / R218398]

	Toby, Male, Unknown Canine, English Toy Spaniel , Blond 06-Nov-2018, 9 mths Mr John Smith [24954] English 1245 piedg			Cellular: (514)555-3333 Work: (450)555-4087
Date	Problem list	Resolution	Comments	
27-Aug-2019	Murmur		Heart murmur grade II	



**Word Document:**

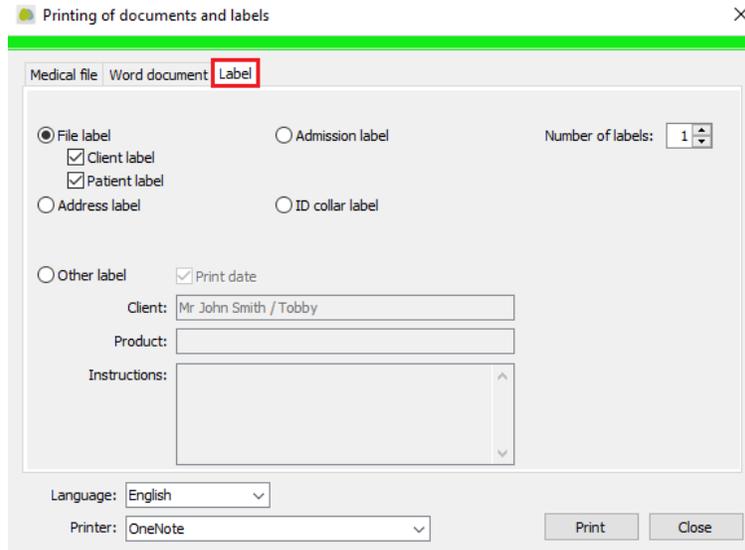
- Enables you to print any of the available documents and forms, that are configured by your clinic.
- Specify the language and printer to use.

**Generate an attached document to the medical file:**

- User must select a transaction in the medical file, then click "Print".
- Select a document, then check the "**Attach document**" box.
- The document will be saved as an attachment to the medical file.
- The document can then be opened, edited and saved before printing.

**Label:**

The software includes several standardized labels that are available from the Label tab.



**Client File label:**

- Clinic info, client name and identification number, address, 2 phone numbers and bar code.



**Animal File label:**

- Clinic info, client name and identification number, animal information and bar code.



Admission label:

- Clinic name, client name, identification number, animal name, animal identification number, weight, 2 phone numbers, assigned vet, reason for visit and visit creation date.



Identification collar:

- Requires a special printer and labels, available from CDMV, code #113007.
- ¾ inch wide and printable in multiple lengths of 6 inches. (6, 12, 18, 24, etc.)
- Information repeated per 6-inch length:
- Gender, sterility, breed, colour.
- Animal's name, client, phone number, reason for visit.
- Age (years, months), weight in kg, animal's bar code.

Male, Unknown  
English Toy Spaniel  
Blond

**Tobby**

Mr John Smith (24954/R218398) (514)555-3333  
40248-004: Castration

9 mths  
5,9000 kg



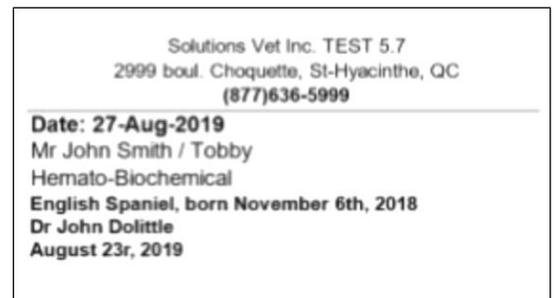
Address label:

- Client name and address (mailing label).



Other label:

- Generic label template where the staff can manually enter the product and instructions or use these fields for other data which they wish to send to a label.



Indicate the number of labels, language and desired printer.

### 3.3.9 Invoice Notes

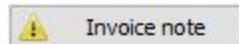
Invoice notes

Notes (SOAP text) entered within the medical file do not print on the invoice.

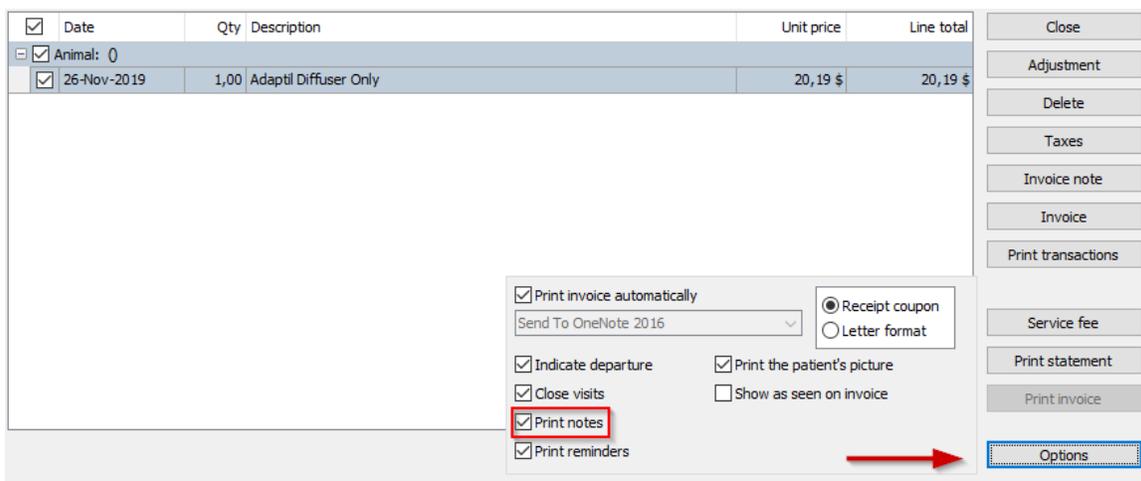
- This button allows the user to add notes that will appear at the end of the invoice.
- This can be useful for client information, special instructions, etc.
- Text can be manually typed, or you can copy and paste notes that were entered in the SOAP text.
- Multiple notes may be added throughout the course of the animal's treatment.



- An exclamation mark indicates that invoice notes are present, as shown here:



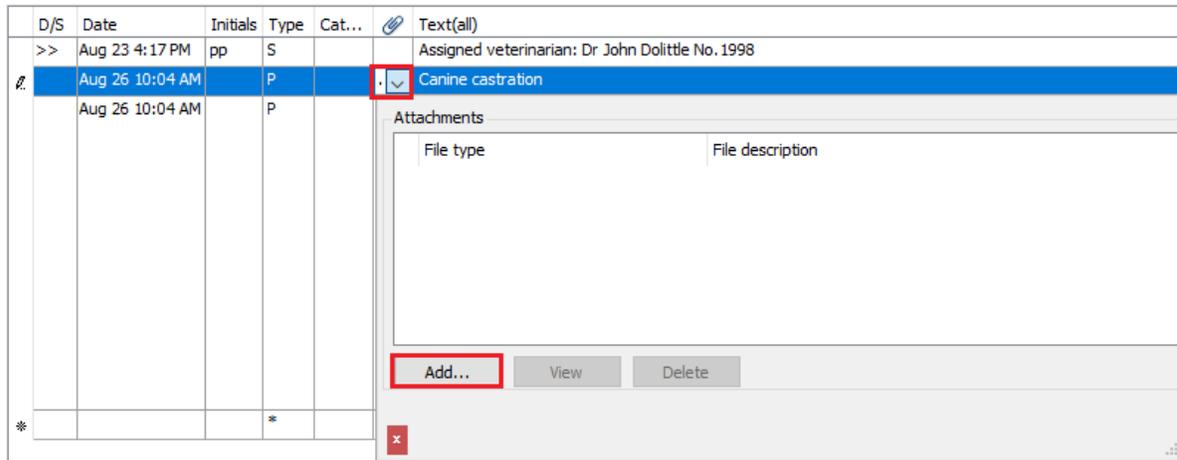
- You can disable the option to print the notes on the invoice and let the user choose when to print the note. Go into "Configuration" > "Printing" > "Invoice" then uncheck the box "Print notes". When printing the invoice, the user will have to activate the option manually to print the notes.



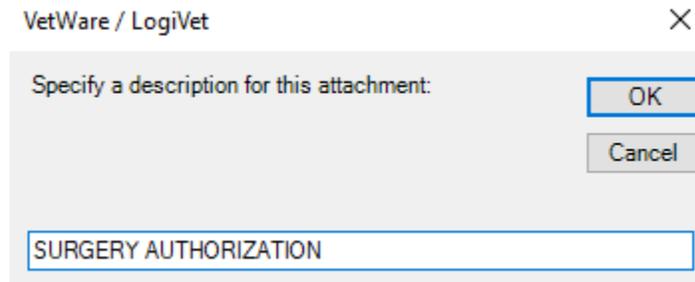
### 3.3.10 Attachments

Use this feature to attach external files to the medical file, such as lab results, digital X-rays etc. The software supports many types of files, including documents, spreadsheets, PDF, images, sound and videos.

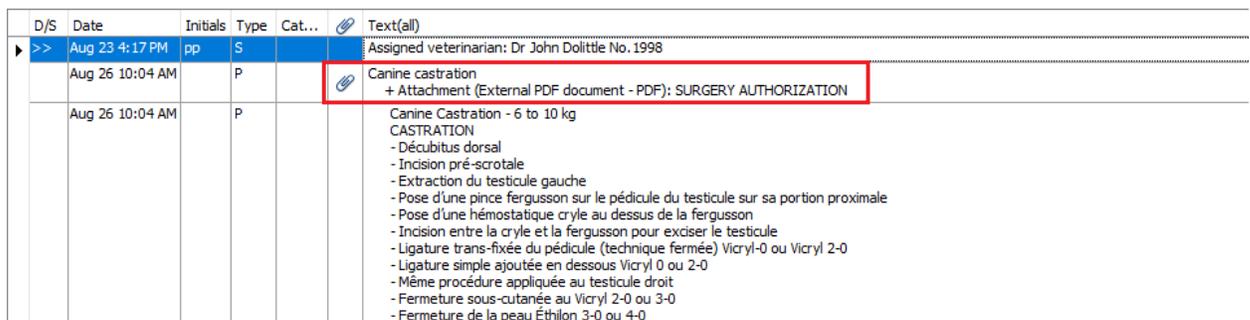
- First, select a transaction to which you wish to attach a file, and then click in the “Attachments” column, open the drop-down menu, then select “Add...”



- The next window allows you to browse your computer to locate the file. Once you have selected the file, click on **Open**.
- You will be prompted to add a description for the Attachment, then click on OK.



- A new line will appear in the medical file, below the selected transaction, indicating the presence of an attachment. Here you will also see the description you entered in the previous step:



- Click **Delete** to remove the attachment.
- Click **View** to open the attachment for viewing.
- Attachments open with the default application selected in your computer for this type of file.
- You can open, modify and save the attachment (**assuming you have the required program installed on your computer**).
- Vetware makes a copy of the original file and saves it to the Data directory, which allows you to delete the original file, if desired.
- Attachments are not stored within the database; rather we store the path information to the copy.
- The copied files are also included in your automated software backup procedures.
- Remember, you can see a full list of all attachments for particular animal from the “Attachment” button in the Animal Details screen.

### 3.3.11 Room/Cage/Status/Veterinarian

Veterinarian:	Dr John Dolittle	▼
Status:	External	▼
Department:	Surgery	▼
Room:	Kennel	▼
Cage:	Kennel #1	▼

At the top of the medical file, the user can make the following assignments:

- Veterinarian: Defines the veterinarian who is currently responsible for the case. It is possible that different veterinarians participate in the treatment of an animal. By changing the assigned veterinarian, it ensures that revenue totals are dispersed amongst the doctors who treated the animal. New transactions that are added to the visit will be “tied” to whichever doctor appears in the Veterinarian field.
- Status:
  - External: By default, all new visits are given the status “External,” which implies that the animal is being treated as an out-patient.
  - Hospitalized: Indicates that the animal has been admitted to the hospital.
  - Released: Indicates that the veterinarian has authorized the release, or discharge of the animal.
  - Closed: Indicates that the visit is complete, no more modifications can be made to the visit, unless it is re-opened (status needs to be changed to anything other than “closed”). You can however add or modify the SOAP text.

- Room: Identify which room the animal is in (optional).
- Department: Identify which department where the animal should be (optional).
- Cage: Specify which cage the animal is in (optional).

### 3.3.12 Chronology

As Vetware allows multiple users to add transactions and notes to the medical file simultaneously, it is possible that the doctor may wish to re-order the transactions in a logical presentation.

This can be achieved in several different ways:

1. **Manually**
2. **Automatic** - Entire visit sorted chronologically
3. **Automatic** - Apply actions to selected transactions

#### 1. Transactions can be re-ordered **manually** by the following steps:

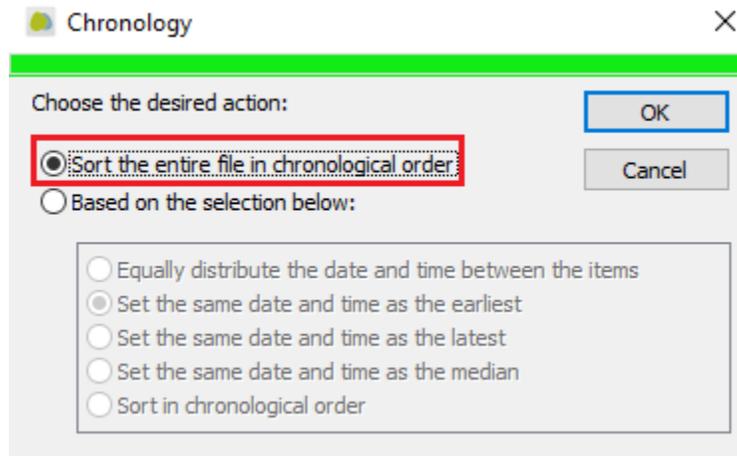
- When a new service, product or group is selected, it will be inserted into the medical file **above** the transaction in focus (highlighted in blue).
- This allows the user to “insert” new transactions into the body of the visit, as opposed to at the end.
- Select the transaction(s).
- Right click on the selection, hold the button and move your cursor up or down.
- You will notice a blue line which indicates the insertion point.
- Release the right click to drop the transaction(s) above the insertion point indicator.

D/S	Date	Initi...	Type	Cat...	Text(all)
>>	Aug 27 2:42 PM	pp	S		Assigned veterinarian: Dr John Dolittle No. 1998
	Aug 27 2:42 PM	pp	P		Exam
>	Aug 27 2:43 PM		P		X-Ray first projection - Standard Price analyse de la radio et diagnostique:
>	Aug 27 2:43 PM		P		X-Ray, other projection - Standard price
>>	Aug 27 2:44 PM		P		IDEXX Blood tests - IDEXX Biochemical EXT1 (With SDMA)
*			*		

D/S	Date	Initi...	Type	Cat...	Text(all)
>>	Aug 27 2:42 PM	pp	S		Assigned veterinarian: Dr John Dolittle No. 1998
	Aug 27 2:42 PM	pp	P		Exam
>>	Aug 27 2:44 PM		P		IDEXX Blood tests - IDEXX Biochemical EXT1 (With SDMA)
>>	Aug 27 2:43 PM		P		X-Ray first projection - Standard Price analyse de la radio et diagnostique:
>>	Aug 27 2:43 PM		P		X-Ray, other projection - Standard price
*			*		

2. To sort the entire visit chronologically, click on the “**Chronology**” button.

- Click on “**Sort the entire file in chronological order**” and click **OK**.



3. To modify the chronology of a selected group of transactions:

- Select the transactions, hold the button and drag the cursor to highlight multiple records.
- Or, click on the first transaction, then hold the CTRL key on your keyboard while clicking on individual transactions throughout the visit to highlight.
- Click on the Chronology button and select the desired action under “**Based on the selection below**”:
- Equally distribute the date and time between items.
- Set to the same date and time as the earliest.
- Set to the same date and time as the latest.
- Set to the same date and time as the median.
- Sort in chronological order.
- When you have made your selection, click on **OK**.

#### Deleting a visit:

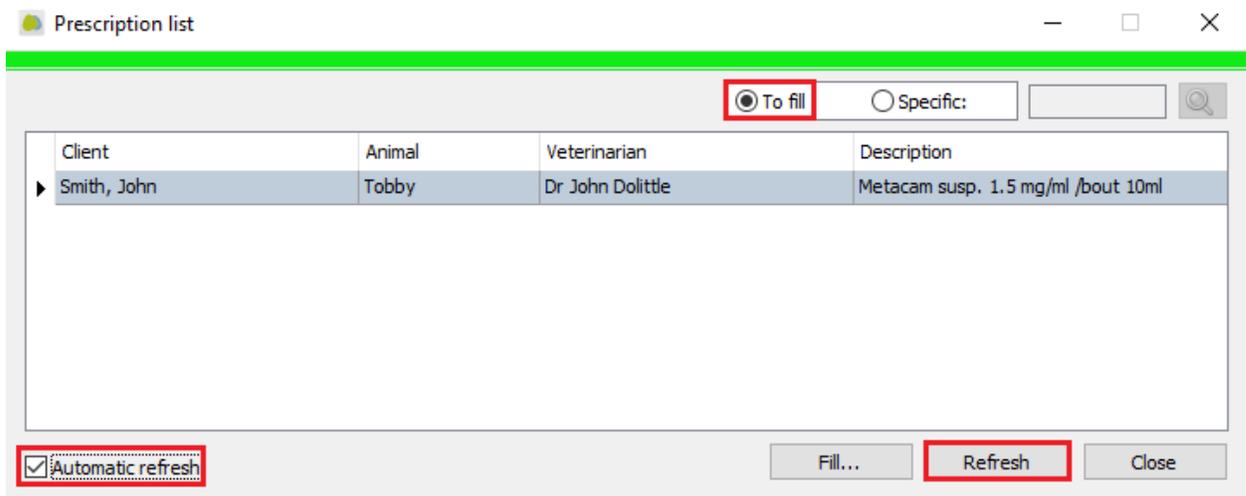
Once a visit has been invoiced, it cannot be deleted. However, if the transactions have not been invoiced, the visit can be deleted.

- First, you must delete all the transactions from the visit.
- Next, Exit the medical file and select the visit from the Search screen.
- Click on “Modify” and then on “Delete”.
- Note: the visit will still appear on the list until you refresh the search screen.

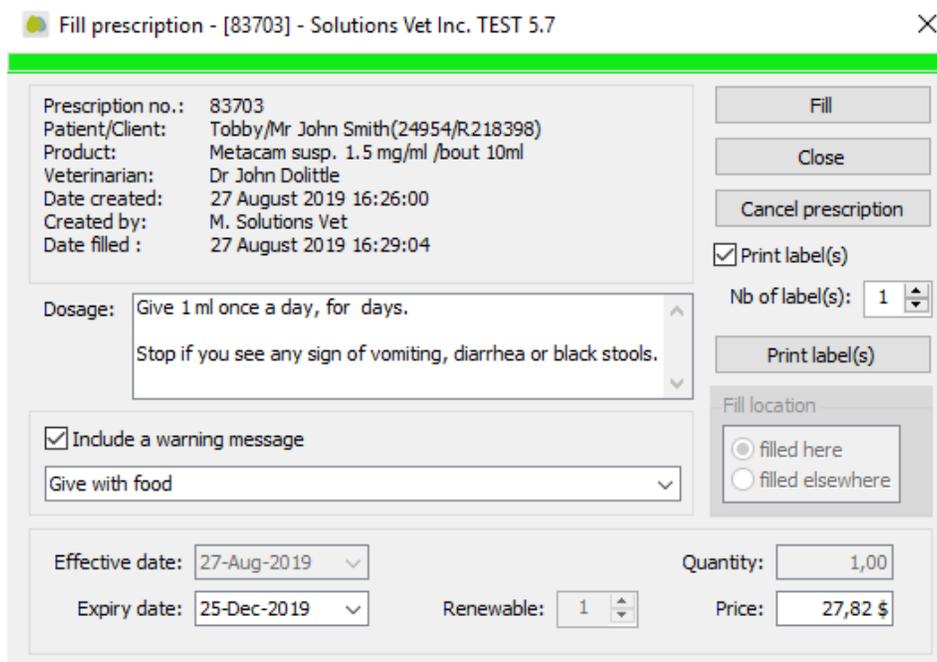
#### 4. Prescription List

The **Prescription List** is a convenient way for the clinic to manage Prescriptions.

- For example, you might have the **Prescription List** opened on your pharmacy computer all times, set to **“Automatic Refresh”** and displaying **“To fill”**.
- If the doctor enters a prescription in the medical file, and indicates that it has not been filled, the staff in the pharmacy would immediately see the prescription appear on the list.
- This enables the doctor to communicate with the pharmacy that they need to prepare the prescription.



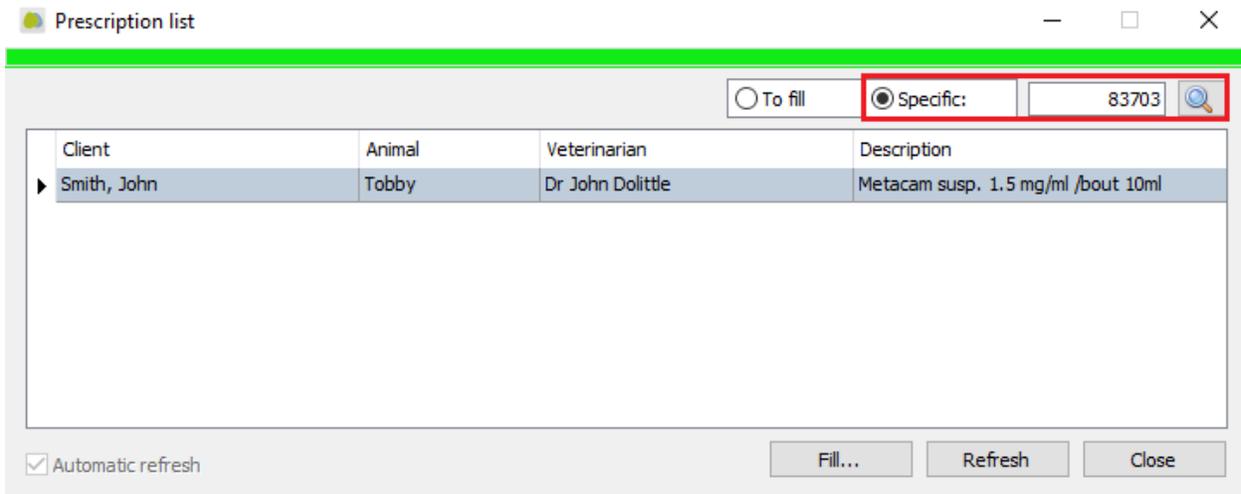
- By double-clicking on an entry, the staff will see the full prescription details.
- Here, the user can modify the dispensing instructions and the final sale price.



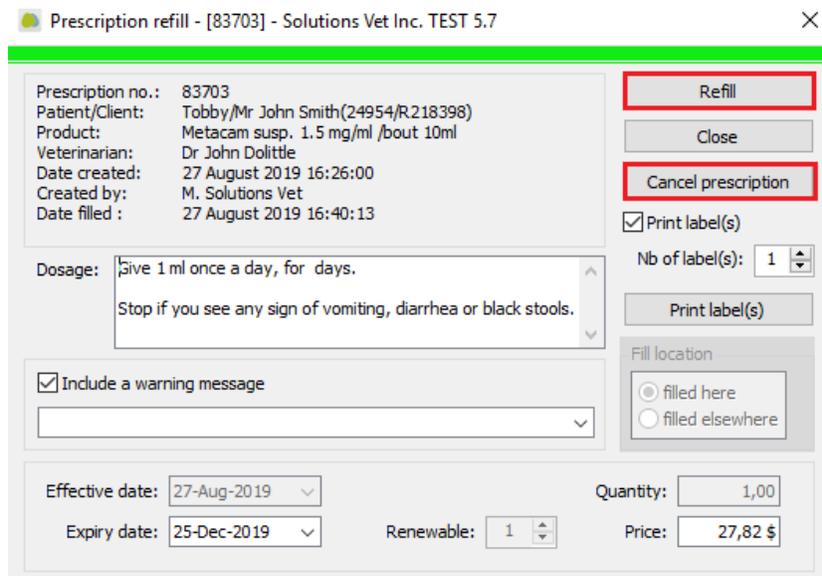
- Click on Fill to indicate that the prescription has been prepared, this will adjust the inventory values and charge the client's account.
- Click Print Label to generate a prescription label.

Staff might also use the Prescription List to search for a prescription when the client calls for a refill.

- In this case, select “**Specific**” and enter the Prescription number.
- Click on the magnifier  or press Enter to execute the search.



- The Prescription Refill screen is similar to the Prescription Fill screen shown earlier
- The Refill number is automatically reduced by 1, indicating the remaining number of refills.
- Click on **Refill** to indicate that the prescription has been prepared; this will adjust the inventory values and charge the client's account.



- **Cancel Prescription** is used when the doctor wishes to cancel remaining refills for a prescription.
- This cancellation is indicated in the Prescription tab of the client's history.

Client history [Smith, Mr John] - Solutions Vet Inc. TEST 5.7

Invoices Payments Prescriptions Estimates Sales transactions Client summary

Show only renewable prescriptions From: 27-Aug-2017 To: 27-Aug-2019

All animals

Patient	Visit	Date	Prescription	Ren...	Description	Status
Tobby	4	27-Aug-2019	83703	0	Metacam susp. 1.5 mg/ml /bout 10ml	Cancelled
Tobby	1	08-May-2019	83672	0	Baytril 15mg /co	