



Academy SOLUTIONS VET

**Module 2 – How to Set Reminders and  
Vaccination Schedules**

## **Module 2 – How to Set Reminders and Vaccination Schedules**

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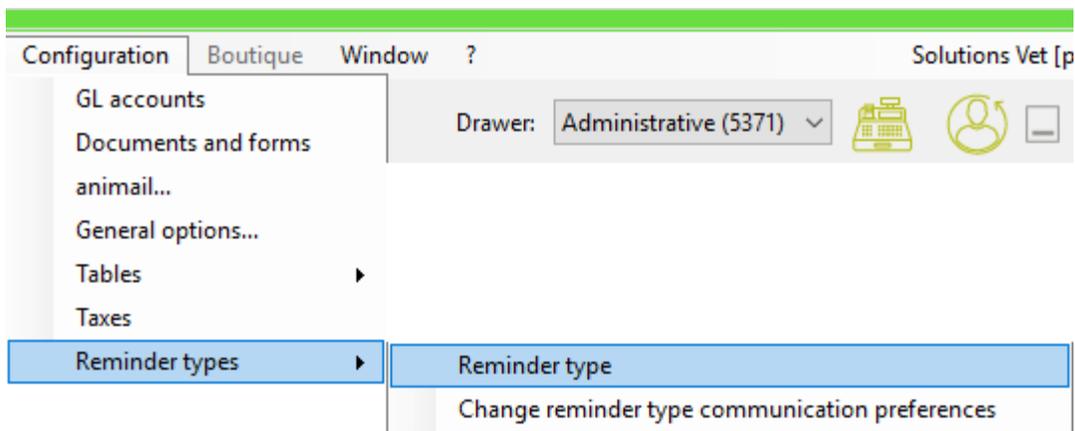
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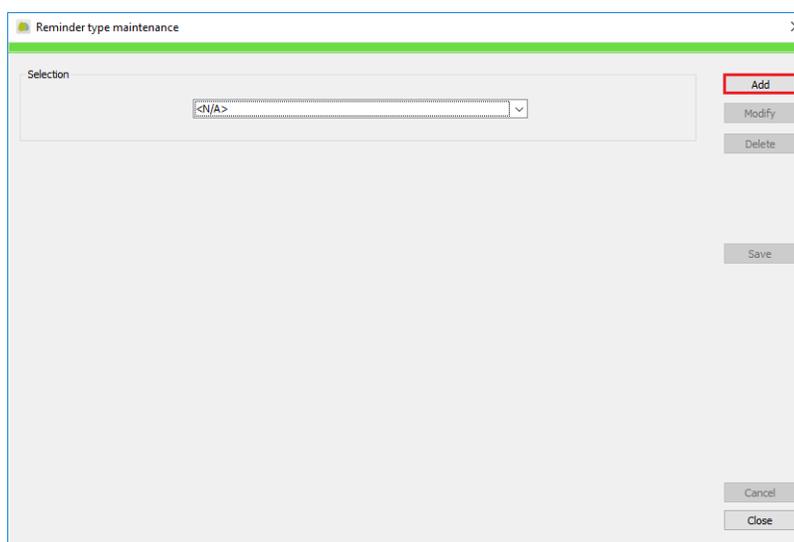
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## 1. Reminder Types

Reminder types are added to your software under: **“Configuration” ... “Reminder types” ... “Reminder type” ....** The different reminder types are used to help you manage your client communications. It is useful to have many reminder types like: a vaccine reminder, a heartworm reminder, a courtesy call after surgery or a reminder for the messages you want to send to your clients. For example: if you want to inform your client that your clinic will be closed, etc. Having many reminder types helps you manage them in your “To do” list. We will discuss this in section 3.



Click on **Add** to add a new reminder type.



It will open the “Reminder type maintenance” screen.

**Description:**

Type in the name of this Reminder Type in the Description field (you must fill in both French and English fields).

**Scheduled number of days:**

When you create a reminder you must select a due date. The scheduled number of days is used to select a date by default. For example: if you create a reminder the 1<sup>st</sup> of February with a scheduled number of days of 10, the reminder will be scheduled for February 11<sup>th</sup>. You will be able to modify this date when you create the reminder.

Client confirmation required:

If the reminder will generate a client visit (vaccination, heartworm...) activate the "Client confirmation required". You will be able to follow the status progress in the "Reminder batch" and the "To do list" windows when the client responds or visits the clinic. In the "New visit" window under the "Answer to a reminder" tab, the reminder will remain in the list after it has been set to "done". You could then assign the reminder as a reason for a visit.

Detail Referral

Urgent Reason: ✖ <N/A>

Subjective:

Reminder response:

<input type="checkbox"/> Due date	Done date	Reminder type	Description
<input type="checkbox"/> 01-May-2020		Anti-parasite reminder	
<input checked="" type="checkbox"/> 25-Jun-2020		Vaccine reminder	

Internal Use Only

Reminders that are for "Internal use only" do not take into account the clients communication preferences. They are used for letting an employee know that he has to call back a client. For example: you can add a note for Dr. Dupont that she has to call Mr. Smith to talk about Toby's medication. Then you could manage this type of reminder in the "To do" list.



Default animail template:

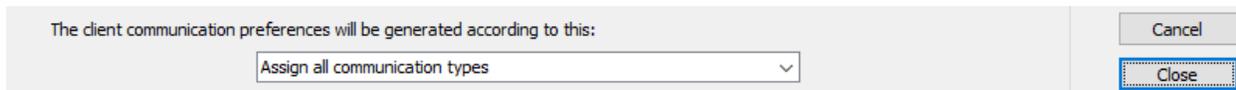
When sending emails for this type of reminder, you can select the default *animail* template that will be used.

Default document to print:

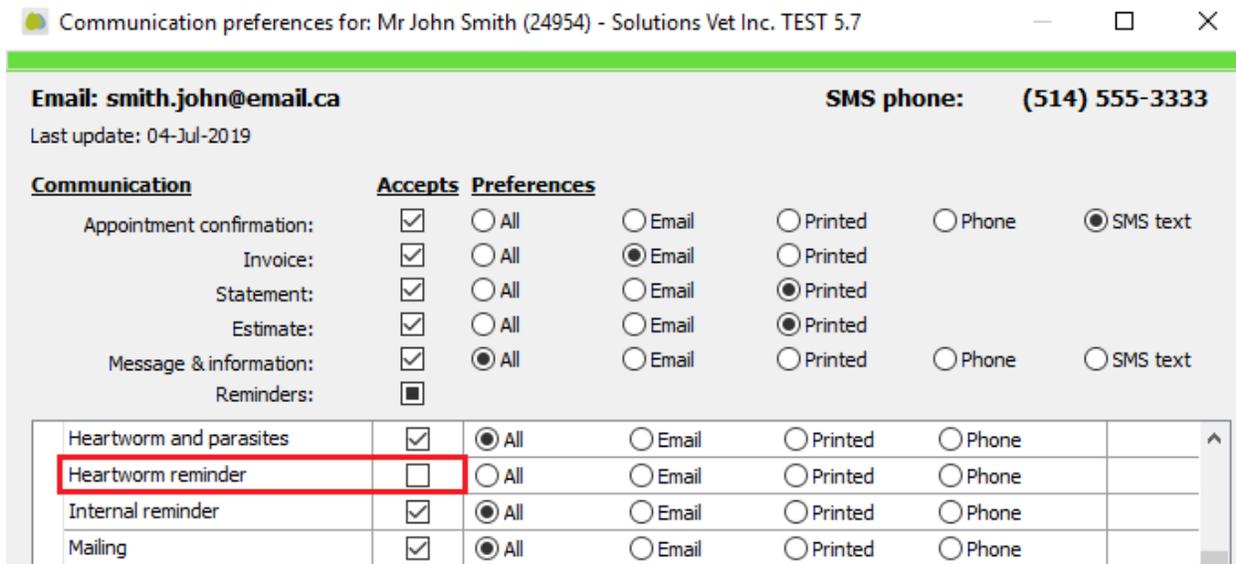
When sending emails for this type reminder, you can select the default document template that will be used.

Note that for the 2 above functions, you will always be able to select another option upon sending or printing the documents.

The last part of the Reminder type window is used to ensure that a reminder is not sent to a client that doesn't want it when you create a new reminder type.



For example, if a client does not want to receive heartworm reminder, their communication preference will be noted like this:



Let's say you want to create a new reminder type for a parasite campaign. You can select to set up the same communication preference configuration as another reminder type. In this case we could select the reminder type "Heartworm". Then all the clients that don't want to receive heartworm reminders will not receive the parasite campaign reminders.

Reminder type maintenance ×

---

Selection

Parasite campaing

Add  
Modify  
Delete

Description [Add]

French: Campagne parasite  
English: Parasite campaing

Save

Scheduled number of days: 365

Client confirmation required:  Yes  No

Internal use only

Default animal template: Fleas, ticks and heartworm prevention

Default document to print: <N/A>

The client communication preferences will be generated according to this:

Assign all communication types  
3 years vaccine booster  
Annual vaccine booster  
Anti-parasite reminder  
Boutique courtesy  
Clinic courtesy  
Heartworm and parasites  
Heartworm reminder

Cancel  
Close

To **Change** the settings of a Reminder Type, select it from the drop-down menu and click **Modify**.

There are 4 ways to add a reminder for a client or an animal: by selling a service from a file (section 1.1), manually (section 1.3), by selling a vaccine (section 2) or by generating a reminder batch (section 3).

## 1.1 Adding a Reminder to a Service

You can add a reminder to a client or an animal when you're selling a service. For example, you can add a courtesy reminder after surgery to call the client back and ask them how their cat is doing now they're back at home.

To do so:

- Under: **"Catalog" ... "Services" ... "Price Schedule" tab**, you can allocate multiple reminders to a specific service.
- Click on the Reminder field ... click on the drop-down arrow to open the reminder screen.
- In the reminder grid, drop down the arrow under "Reminder" and select the appropriate reminder.
- Indicate the number of days when the reminder is due.
- To add or delete reminders, click on  . When you are done click on  to close it.
- In the example below, this service will generate a Courtesy call in 2 days, and a Stiches removal reminder in 10 days.

Price schedule SOAP Applicable taxes

Check/Uncheck all species

./	Description (English)	Price	Vis.	...	...	To	...	...	Reminder	A	C	D	F	Ho	H	M	Z	R
1	0 to 5 kg	160,00	<input checked="" type="checkbox"/>	...	...	0	5	<input checked="" type="checkbox"/>	<input type="button" value="v"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
2	6 to 10 kg	170,00	<input checked="" type="checkbox"/>	...	...	5	10	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	11 to 20 kg	180,00	<input checked="" type="checkbox"/>	...	...	10	20	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	21 to 30 kg	190,00	<input checked="" type="checkbox"/>	...	...	20	30	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	31 to 40 kg	200,00	<input checked="" type="checkbox"/>	...	...	30	40	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	41 to 50 kg	210,00	<input checked="" type="checkbox"/>	...	...	40	50	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	51 to 60 kg	220,00	<input checked="" type="checkbox"/>	...	...	50	60	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	More than 61kg	250,00	<input checked="" type="checkbox"/>	...	...	60	...	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		0	<input type="checkbox"/>	...	...			<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reminders days

Post-op courtesy 2

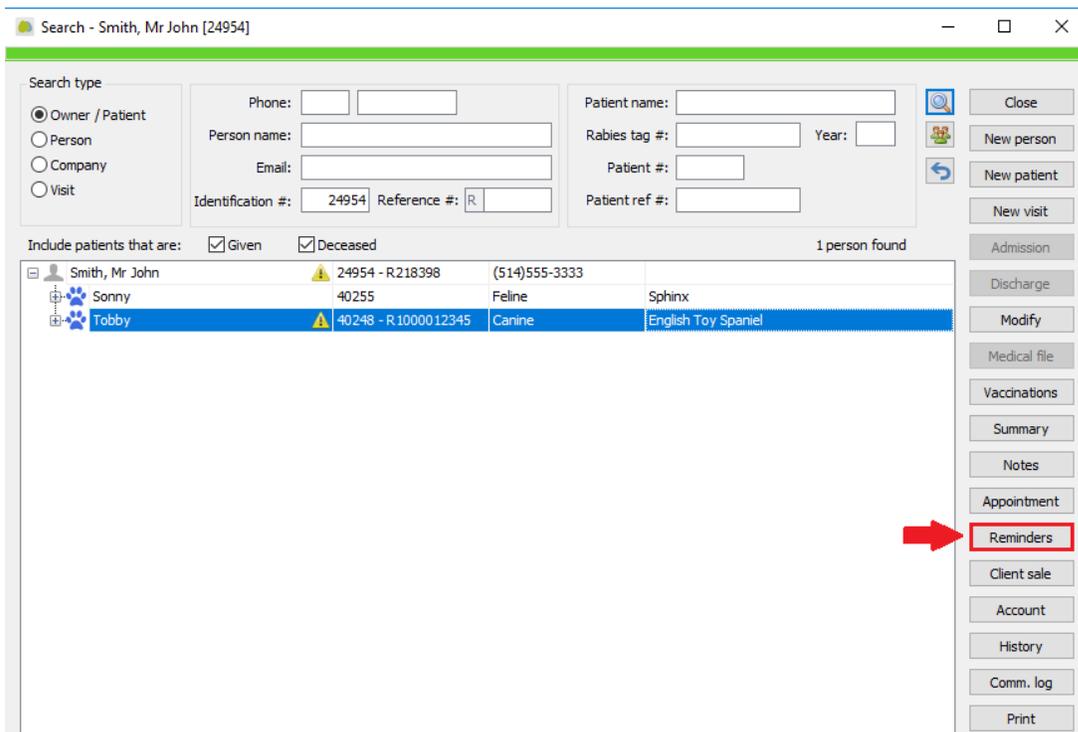
Stiches 10

## 1.2 Viewing Client/Animal Reminders

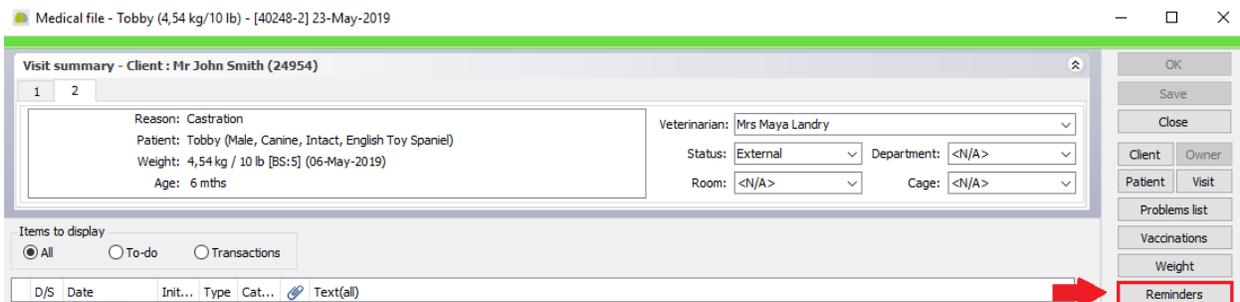
There are many ways to view your reminders in the software. We will now see how to view the reminders for a specific client and their animals. In section 3 we will see how to view the reminders list for all your clients.

You can view a list of animal or client reminders from many screens, including the following:

From the search screen: first select the client or the animal and then click on “Reminders”.



From the “Medical” file:



From the “Animal” window:

If you selected a client and then clicked on “Reminders”, the screen will display all reminders for all active animals in that file, as shown here:

Patient	Specie/Breed	Due date	Reminder type	Message
Sonny	Feline, Sphinx	04-Jul-2020	Vaccine reminder	
Tobby	Canine, English Toy Spa...	01-May-2020	Anti-parasite reminder	
▶ Tobby	Canine, English Toy Spa...	25-Jun-2020	Vaccine reminder	

- You can remove the check mark from “**All active patients**” if you only wish to display client reminders.
- If you selected an animal first and then opened the reminder list, the software only displays reminders for the client and the selected animal by default.
- However, you can click on “**All Active Patients**” to show ALL reminders for ALL active animals.
- You can also select “**Deceased Patients**” and/or “**Given Patients**” to view those reminders (“**Given Patient**” refers to the animal of an owner that has been marked as “**No longer owner**” in the Supplementary Information section of the Animal details window).
- You can also change the order of the list by clicking on any of the column headers (Animal, Species/Breed, Due date, etc.), which will sort the list by the selected column header. First click = ascending order ... second click = descending order.
- **To Do tab** – Displays all outstanding reminders which have not yet been processed by personnel (“**Called**”, “**Printed**” or “**Sent by email**”).
- **Waiting for Answer and/or Visit tab** – Displays reminders that have been processed by the personnel and currently flagged as “**Done**” or “**Client reply**”. This means that the client has been contacted but they may or may not have taken an appointment.
- **History tab** – Displays all reminders that have been completed (set to client visits) or cancelled.

Reminder statuses are defined later in section 3.1.

### 1.3 Adding/Maintaining Animal Reminders

- You can manually add reminders to accounts and/or animals.
- To manually add a reminder to the system, simply click on the Reminders command from any of the above locations.
- Unless an animal is selected first, the new reminder will be set to the client.
- When an animal is selected first, the new reminder will be set to that animal.
- Click on **Add** – In the example below, the animal Tigger was selected prior to opening the reminder list.
- The top of the screen confirms that we are about to create a reminder for Tigger.

- Choose the reminder type from the drop-down menu.
- Set the number of days when the reminder is due or enter the reminder due date.
- You can assign this reminder to an employee using the “Person Responsible” drop-down menu or you can leave the reminder unassigned (<N/A>).
- Notes can be added.

- If you want to set this reminder for the client and not for the specified animal, select “Add a reminder for the client”.
- New reminders are typically entered without a status, thus leaving them as “To Do” – although you can set a status using the check boxes at the bottom.

To modify an existing reminder, simply click on the Reminders button from one of the previous windows and then:

- Double-click on the reminder, or click on the reminder and then on “Modify”

Mr John Smith (24954) English Cellular: (514) 555-3333 Work: (450) 555-4087

All active patients  
 Deceased patients  
 Given patients

To do | Waiting for answer and/or visit | History

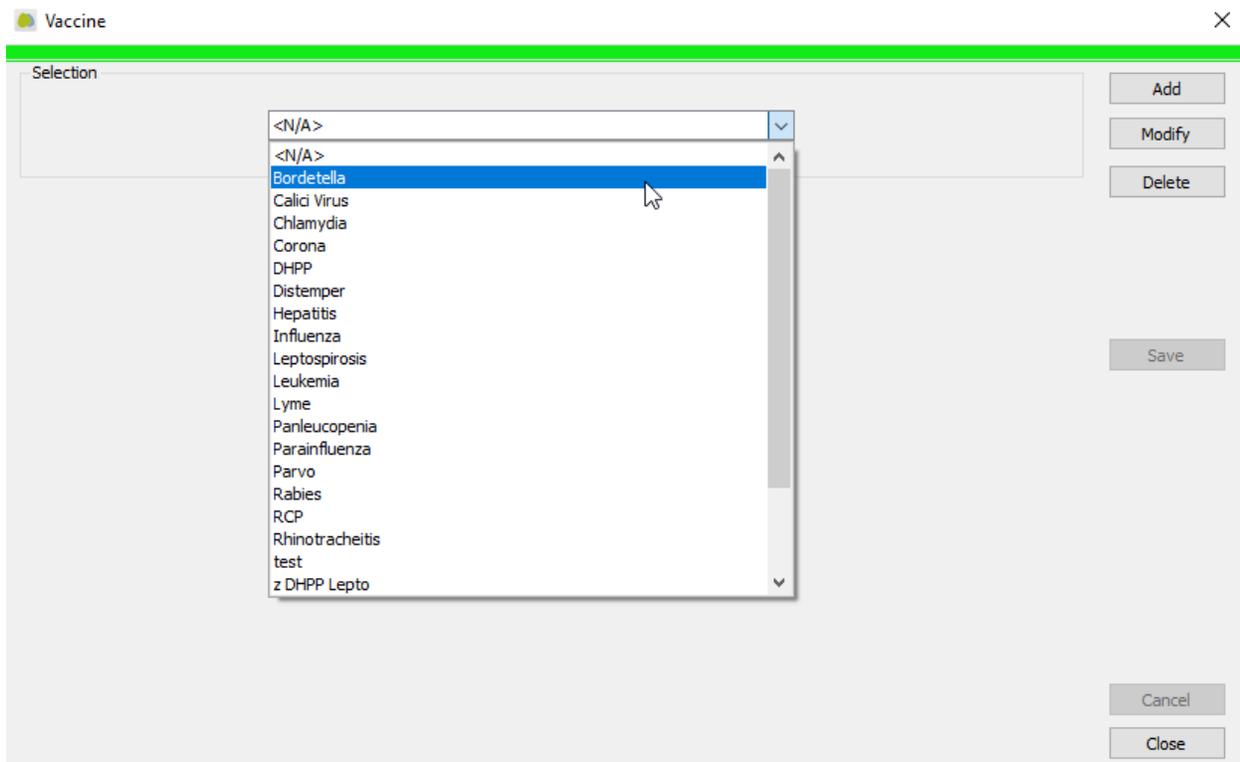
Patient	Specie/Breed	Due date	Reminder type	Message
▶	Client reminder	19-Jul-2019	Boutique courtesy	Pick up his order
Tobby	Canine, English Toy Spa...	01-May-2020	Anti-parasite reminder	
Tobby	Canine, English Toy Spa...	25-Jun-2020	Vaccine reminder	

Buttons: Add, Modify, Delete, Close

## 2. Vaccination Types

In addition to the reminder system, the software also allows you to create and maintain the vaccination schedules for your patients. As previously discussed, reminders can be linked to Services. Vaccination information is assigned to Products, and specifically to your Vaccine Products. Once the software is set up correctly, the software will create a reminder as you programmed it when you sell a vaccine. You can also have a vaccine certificate which indicates diseases against which an animal has been vaccinated and when their next shot is due.

## 2.1 Creating Vaccine Programs



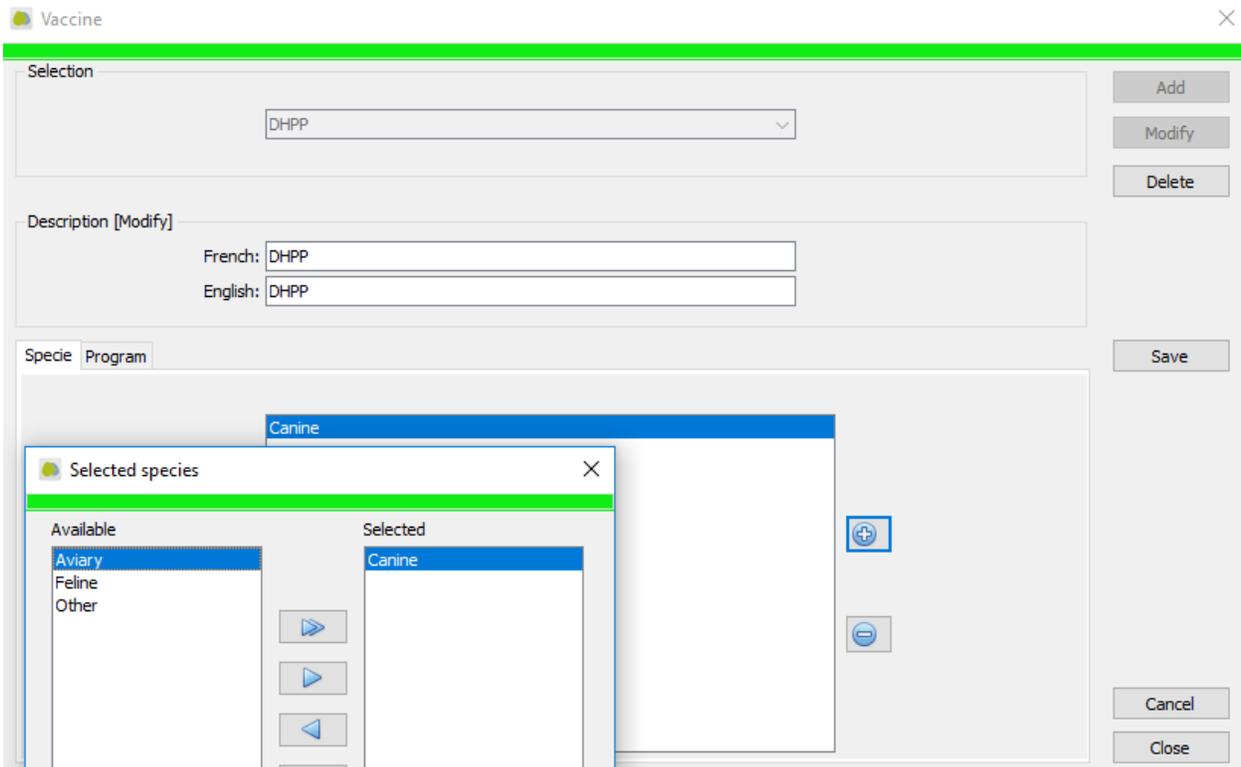
You can create vaccine programs under **“Configuration” ... “Tables” ... “Vaccine”**

...

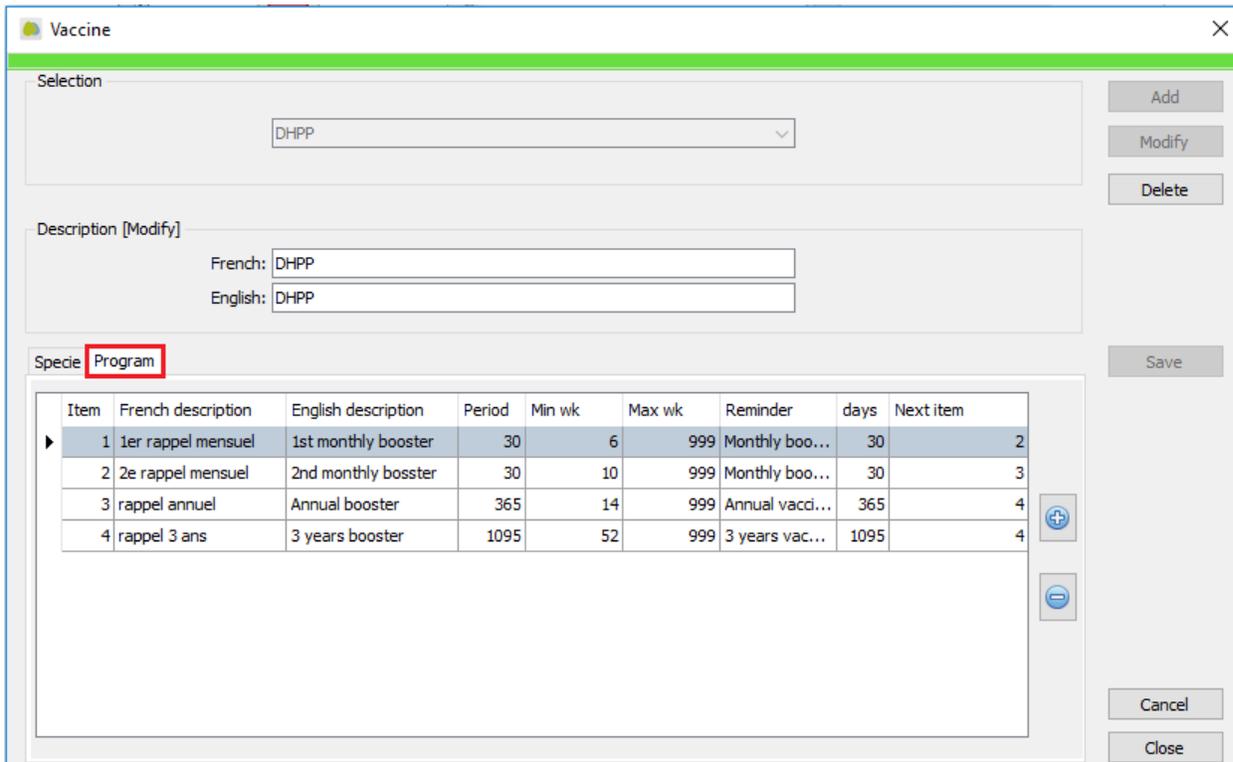
- Here you can define the specific diseases in vaccines that are administered to your patients and create a program for the reminders.
- If a product includes multiple diseases, you can add these to one vaccine type or create each disease individually.
- Examples of vaccine types: “Parainfluenza. Distemper, Adenovirus, Parvovirus” etc. Some clinics prefer to use an acronym like: “DHPP”.

- Using the **“Species”** tab, you can define which species this particular vaccine is relevant to with the . Select the specific species and click on 

.



Under the **“Program”** tab, you can define when the next reminders are due. By setting up various items, you can even distinguish between a reminder date for a puppy for his first vaccination or a reminder for an adult dog.



When selling a vaccine (Product), the system will refer to the vaccine information displayed here to suggest which scheduled vaccine to give. The suggestion is based on the species, age and previous vaccine history. We will see how to configure the product in section 2.2.

- **Description** – Displays the type of vaccine within the series. This description can also be displayed on the vaccine certificate.
- **Period** – How many **days** the vaccine is valid for.
- **Min & Max** – Age range of the animal, in weeks, that qualifies them for this item. In the example above we cannot use item canin number 1 on a puppy under 6 weeks.
- **Reminder** – Type of reminder generated by the system. Typically, clinics use a vaccination reminder to simplify the categorization.
- **Days** – Number of days when the reminder will be due. It is often the same as the “effective” period.
- **Next Item** – Once the animal has received this item, which item in the series should be next?

## 2.2 Adding vaccination types to products

Here we will see how to set up a product to identify the diseases present in the vaccine.

Detailed information about adding items to the product catalog is discussed in Module #3 “Catalog”; here we will just review the vaccine products.

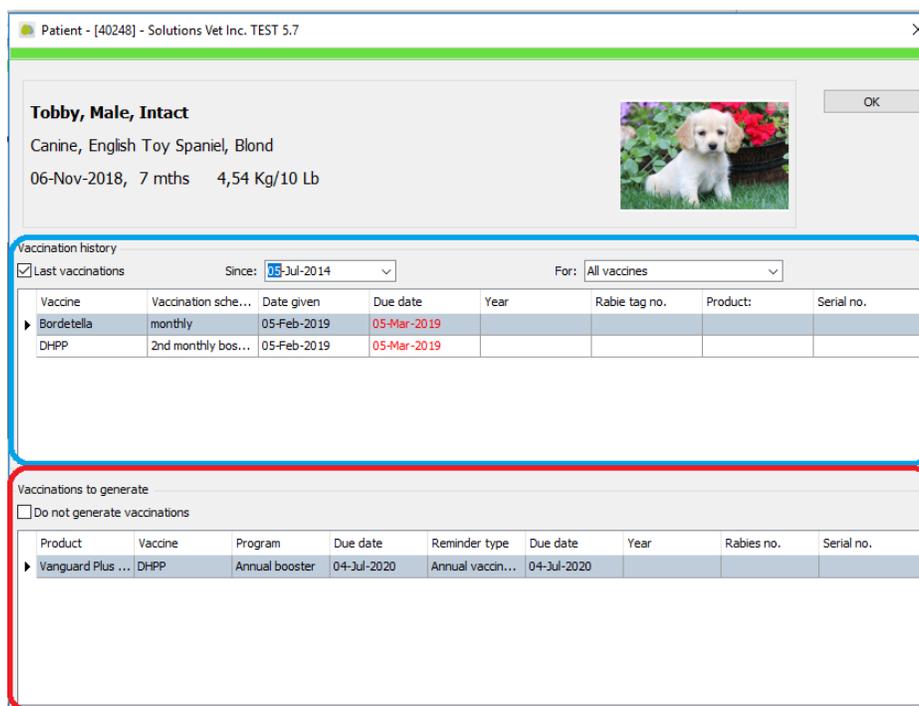
The screenshot shows the 'Product Maintenance' window. On the left, a 'Product explorer' pane lists various products, with 'Nobivac canin DA...' selected. The main area is divided into 'Product description' and 'Invoice description' sections, both containing the text 'Nobivac canin DAPPV + L4 1 dose'. Below these are fields for 'Revenues category' (Biological), 'Classification' (Vaccines), 'Manufacturer' (<N/A>), and 'Planogram' (<N/A>). There are also checkboxes for 'Invalid', 'Group use only', 'Show on recommendations', 'Prescription required', 'Exclude prescription fee', 'Controlled substance', and 'Track inventory by lot'. A 'Unit cost' of 6,57 \$ and a 'Sale price' of 13,14 \$ are shown. At the bottom, a 'Label configuration' section has two lists: 'Available' (containing Bordetella, Calici Virus, Chlamydia, Corona, Distemper, Hepatitis, Influenza, Leukemia, Lyme, and Parvovirus) and 'Selected' (containing DAPP and Leptospirosis). Buttons for 'Add', 'Delete', 'Inventory', 'Usage', 'Print UPC', 'Next', 'Save', and 'Close' are visible at the bottom of the window.

Under: **“Catalog” ... “Products” ...**

- Select the product you want to set up.
- From the “Vaccines” tab, select the appropriate disease that this product contains.
- This will link your vaccine schedule to the item when the product is sold (created under “Vaccine types” in the previous section.).

**2.3 Adding a vaccine to the medical file**

- When you sell a vaccine product, the animal’s vaccination history screen (as below) will open automatically.
- The upper section (in blue) shows the vaccinations already received. You can see when they were given and when the next one is due. The reminder date will show in red (as in our example) when this date is reached or past (late). In our example Toby should receive his kennel cough vaccine and his basic vaccine.
- The bottom section (in red) shows in the medical file the vaccines that were just sold. In our example below a group was created with 1 vaccine products: Vanguard Plus DHPP. The system will automatically suggest which item should be selected according to the program you have established. This suggestion is based on the vaccination history and the age of the animal.



Then, click on a vaccine to open the screen and add the pertinent information. The following window will be displayed:

- You can fill in the year, the rabies tag number and the vaccine serial number
- You can always change the reminder suggested by the system by clicking on the drop-down menu and selecting the appropriate reminder.
- In Toby's example, the system based its suggestion on the history. Last month Toby received a DHPP vaccine that generated a 2<sup>nd</sup> monthly booster reminder. In our program it is item 2. We stated that after giving item 2 we must use item 3. So the system has selected an annual reminder for Toby.

Item	French description	English description	Period	Min wk	Max wk	Reminder	days	Next item
1	1er rappel mensuel	1st monthly booster	30	6	999	Monthly boo...	30	2
2	2e rappel mensuel	2nd monthly booster	30	10	999	Monthly boo...	30	3
3	rappel annuel	Annual booster	365	14	999	Annual vacci...	365	4
4	rappel 3 ans	3 years booster	1095	52	999	3 years vac...	1095	4

If there is no vaccine history, the system will base its selection on the first vaccination program and on the age of the animal. You should then select the appropriate vaccination program in the drop-down menu.

## 2.4 Rabies Tag Numbers

- As mentioned before the vaccine serial number and rabies tag information can be filled by clicking on the line and adding the information.

Vaccinations to generate

Do not generate vaccinations

Product	Vaccine	Program	Due date	Reminder type	Due date	Year	Rabies no.	Serial no.
Defensor 3 Rage	Rabies	Yearly	04-Jul-2020	Annual vaccin...	04-Jul-2020			

Rabies: Yearly  Annual vaccine booster:

Year:  Rabies no.:  Serial no.:

OK Cancel

## 2.5 Viewing Animal Vaccine Schedules

The vaccination schedule for an animal can be reviewed by clicking on the “Vaccinations” command displayed in either the Search window, the Animal window, the Medical file or in the Visit List.

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

**Tobby, Male, Intact**  
Canine, English Toy Spaniel, Blond  
06-Nov-2018, 7 mths 4,54 Kg/10 Lb



OK

Vaccination history

Last vaccinations Since: 05-Jul-2014 For: All vaccines

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

Vaccination - Solutions Vet Inc. TEST 5.7

Vaccine / Vaccination schedule

<input checked="" type="checkbox"/>	Bordetella	monthly
-------------------------------------	------------	---------

Effective date: 05-Feb-2019 Next vaccination: 05-Mar-2019

Generate reminders Reminders: Monthly booster vaccination Due date: 05-Mar-2019 -122

Year:  Rabies no.:  Serial no.:

OK Close

If there was a mistake, you can modify this information (serial number, tag number, etc.) by clicking on the vaccinations button. You have to double-click on the vaccine to modify.

Useful when an animal loses his rabies tag!



### 3. Generating Reminders

#### 3.1 Reminder Status Definitions

Here we will discuss how the reminder status classification is handled in the window “List of all reminders for a client” (see below).

Mr John Smith (24954) English Cellular: (514) 555-3333 Work: (450) 555-4087

All active patients  
 Deceased patients  
 Given patients

To do | Waiting for answer and/or visit | History

Patient	Specie/Breed	Due date	Reminder type	Message
	Client reminder	19-Jul-2019	Boutique courtesy	Pick up his order
Tobby	Canine, English Toy Spa...	05-Feb-2019	Monthly booster vaccin...	DHPP, '1st monthly boos...
Tobby	Canine, English Toy Spa...	05-Mar-2019	Monthly booster vaccin...	DHPP, '2nd monthly boss...
Tobby	Canine, English Toy Spa...	05-Mar-2019	Monthly booster vaccin...	Bordetella, 'monthly'
Tobby	Canine, English Toy Spa...	01-May-2020	Anti-parasite reminder	

Buttons: Add, Modify, Delete

- Done
- Client reply
- Client visit
- Cancelled

No Status: There was no action on the reminder; reminder is **“To Do”**.

Done: The clinic handled the reminder – client was called/reminder was mailed or emailed. It will be displayed in the **“Waiting for answer and/or visit”** tab if the reminder requires a client confirmation. If not it will be displayed in the **“History”** tab.

Reminder type maintenance

Selection: Vaccine reminder

Description [Modify]:  
 French: Rappel vaccin  
 English: Vaccine reminder

Scheduled number of days: 365

Client confirmation required:  Yes  No

Internal use only

Buttons: Add, Modify, Delete, Save

Client reply: The client responded, the appointment has been booked. The reminder will be in the **“Waiting for answer and/or visit”** tab.

Client visit: The animal was seen. When the visit was created, the reminder was assigned. The reminder is “closed” and does not require further action. It will be in the **“History”** tab.

Reminder response:		Due date	Done date	Reminder type	Description
<input type="checkbox"/>	Due date	05-Feb-2019		Monthly booster vaccination	DHPP, '1st monthly booster'
<input checked="" type="checkbox"/>		05-Mar-2019		Monthly booster vaccination	DHPP, '2nd monthly booster'
<input checked="" type="checkbox"/>		05-Mar-2019		Monthly booster vaccination	Bordetella, 'monthly'
<input type="checkbox"/>		01-Mav-2020		Anti-parasite reminder	

Cancelled: The reminder is suspended, usually at the request of the client – pet was *not* seen, but the reminder will be closed. The reminder stays on file, cancellation date is noted. It will be displayed in the **“History”** tab.

### 3.2 The “To do” list

The “To do list” is your number one tool to manage the telephone reminders. You can view all the reminder types in your system or select only the ones you want to handle.

The screenshot shows the 'Reminder List Maintenance' window. At the top, there are tabs for 'To do', 'Done', 'All reminders', 'Waiting for reply', and 'Waiting on visit'. Below the tabs are filters for 'Type' (set to 'All'), 'Assigned to' (set to 'All'), 'From' (08-Jan-2019), and 'To' (15-Jul-2019). A table lists reminders with columns for Due date, Days, Type, Client, L, Patient, and Media. One row is highlighted in blue. Below the table, a detailed view of a reminder is shown, including fields for Type, Days, Date, Owner, Patient, Contact, Cellular, and Work. There are also checkboxes for 'Done', 'Client replied', 'Client visit', and 'Cancelled'. At the bottom, there are buttons for 'Next reminder', 'Save', 'Comm. log', 'Delete', 'Print', and 'Close'. A red arrow points to the 'Total reminders: 14444' text at the bottom left.

Due date	Days	Type	Client	L	Patient	Media
05-Mar-2019	-125	Annual vaccine booster	Lamothe, Mme Josée (12746/R2976)	Fr	Abygail	Any
05-Mar-2019	-125	Annual vaccine booster	Lamothe, Mme Josée (12746/R2976)	Fr	Abyss	Any
05-Mar-2019	-125	Annual vaccine booster	Rheault, Mme Christiane (5697/R7946)	Fr	Tealk	Any
05-Mar-2019	-125	Monthly booster vaccin...	Smith, Mr John (24954)	En	Tobby	Any
05-Mar-2019	-125	Monthly booster vaccin...	Smith, Mr John (24954)	En	Tobby	Any
05-Mar-2019	-125	Annual vaccine booster	Waterloss, Mme Alexandra (180/R4575)	Fr	Raja	Any
06-Mar-2019	-124	Annual vaccine booster	Anderson, M. Yves (24748/R3245)	Fr	Aby	Any
06-Mar-2019	-124	Annual vaccine booster	André, M. Yves (24739/R7324)	Fr	Alfred	Any

The **red** section displays the search results according to the criteria entered in the **green** and **purple** sections.

- You can expand or shrink all the sections Due Date, Days, Type ... to have all the information displayed
- When you select a line you will view more information about a particular reminder in the **orange**, **blue** and **pink** sections.

The **purple** section is used to refine your search.

- You can select a Reminder type, a Responsible Person and Due Dates to perform your search. If you do not select any Reminder type or Responsible Person, *all* reminders will be displayed within the selected dates (see our example).

The **orange** section shows more information about the owner and their animal, such as their phone number.

- You can modify the reminder type as well as the due date.

The **pink** section shows the reason for the reminder.

- If the reminder was created by a service, the service name will be displayed in this window.
- If the reminder was manually created, the added note will be displayed in this window.
- If the reminder was added by a vaccine, the associated disease and the program description will be displayed in this window (see our example).
- If the reminder was created with a reminder batch (see section 3.3), there will be no message in this window.
- You can add a note in this box. For example, you can type that on July 28<sup>th</sup> you left a message on the client's voicemail.
- These notes will be displayed on the reminder's message box and on the medical file when this reminder is selected as the reason for the visit.

The **blue** section shows who is the person responsible for the reminder, the appointments associated with this animal and the reminder status.

- You can change the person responsible for the reminder by using the drop-down menu.
- When this animal has an appointment in the appointment book, the appointment will be displayed. You can view the appointment list for this client using the “Appointment” button.
- The reminder status is also displayed. When you handle a reminder, you can update the status appropriately (as shown in section 3.1) by using the boxes “Done”, “Client reply”, “Client visit” or “Cancelled”. Notice that if you choose “Client reply” it sets automatically to “Done”. The same thing applies for “Client visit”.

The **green** section offers you many tabs to display your reminders according to their status.

The “**To do**” tab displays the reminders that have no status. They have not been handled.

The “**Done**” tab displays the reminders that have a “Done”, “Client reply” or “Client visit” status.

The “**All reminders**” tab displays all reminders no matter what their status is.

The “**Waiting for reply**” tab only displays the reminders with “Done” status. The client was contacted once but they did not schedule any appointment. **You can use this list to contact these clients again.**

The “**Waiting for visit**” tab display the reminders that have a “Done” and “Client reply” status.

In the bottom left part of the window (red arrow) the number of reminders in the tab you had selected is displayed. You can then see how efficient your reminders are.

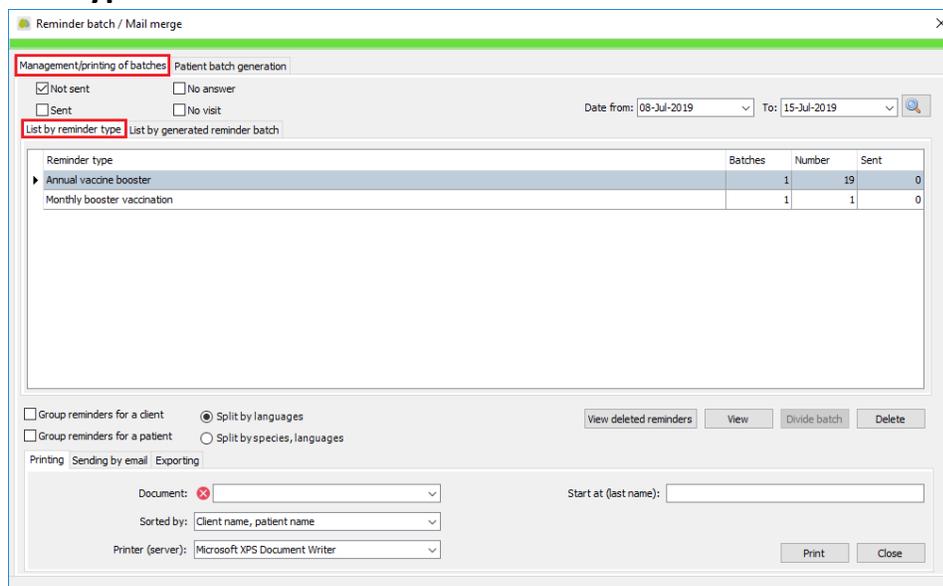
The **black** section gives you quick access to other windows that contain additional information about the animal, the owner, the appointments, etc. Therefore, you do not have to leave this window to get the information you need.

- Once the desired criteria are entered, use the search command to generate your list. 
- You can print a reminder list, although you can do all required work directly from the “To Do” list.
- If the contact for this reminder is set to a client other than owner, the contact name is displayed in the lower left and the contact command becomes available (opens to the contact’s account information screen).
- Reminders can also be purged completely using the “Delete...” command. **\*\*\* If deleted, these reminders will no longer be displayed in the Animal’s Reminder History \*\*\***. This function should only be used to delete a wrong reminder, not when a client does not want to set up an appointment.
- When you are finished with processing a reminder, save your changes and click “Next reminder” to continue along the list.

### 3.3 Reminder Batches

You can manage your reminder batches under “Function” ... “Reminder Batches” ... You can print your reminders to be sent by mail or send them by email using this window. You can also create new reminder batches based on certain criteria. This function is very useful if you want to send a reminder to several clients, for example, for heartworm or to announce changes in the clinic.

First we will look at the “Management/printing of batches” tab and the sub-tab “List by reminder type”.



The screenshot shows the 'Reminder batch / Mail merge' window. The 'Management/printing of batches' tab is active, with the 'List by reminder type' sub-tab selected. The window contains a table with the following data:

Reminder type	Batches	Number	Sent
Annual vaccine booster	1	19	0
Monthly booster vaccination	1	1	0

Below the table, there are several options for grouping and printing reminders, including checkboxes for 'Group reminders for a client', 'Group reminders for a patient', and radio buttons for 'Split by languages' and 'Split by species, languages'. There are also buttons for 'View deleted reminders', 'View', 'Divide batch', and 'Delete'. At the bottom, there are fields for 'Document', 'Sorted by', 'Printer (server)', and 'Start at (last name)', along with 'Print' and 'Close' buttons.

- When the window opens, the reminders to be done (“To Do”) will be displayed for the following week. You can change this date range in the right upper section of the window. Click on the “Search” button to update the window.
- Reminders are grouped by reminder types.
- You can also display the reminders that have been sent. This option gives you access to two additional buttons “No answer” and “No visit” to filter the list. As soon as a reminder is printed or sent, this status changes to “Sent”.
- To see the details of a reminder type lot, click on the reminder type you want to see and then click on View or double-click on it. This window will open:

List of reminders not printed from 06-Sep-2019 to 13-Sep-2019 - Solutions Vet Inc. TEST 5.7

Client	Address	Patient	Specie	Primary breed	Secondary breed	Due date	Last visit (#)	Email
*** Landry, Mme Maya (24881)	Tech. support Logivet	Forky	Canine	Bichon		08-Sep-2019	26-Jul-2019 (16)	maya.landry@cdmv.com
Picard, M. Samuel (24953/R2)	1234 Colley, Lachine, QC H2H 2C2	Garfield	Feline	Domestic		09-Sep-2019	06-Sep-2019 (16)	s.picard@hotmail.com



(2) \*\*\* According to the communication preferences, this client does not accept to receive this type of reminder. Delete Print Close

**Warning:** The delete command will permanently delete the selected reminder from the animal’s file.

You can view this list before handling these reminders. The reminders at the top of the list marked with \*\*\* note clients that have declined this reminder type in their communication preference. These reminders will not be handled. To avoid calling these clients by mistake, you could delete these reminders so you will not see them in the client’s file.

To print this list and view it later, click on the “Print” button”.

The bottom section in the reminder batch window is used to print the reminders to be mailed, to send reminders by email or to export them in another format.

The screenshot shows a software interface for managing reminders. At the top, there are two rows of options: 
   
Row 1:  Group reminders for a client,  Split by languages, View deleted reminders, View, Divide batch, Delete.
   
Row 2:  Group reminders for a patient,  Split by species, languages.
   
Below these is a tabbed interface with three tabs: 'Printing' (highlighted with a red box), 'Sending by email', and 'Exporting'.
   
The 'Printing' tab contains:
   
- A 'Document:' dropdown menu with a red 'x' icon.
   
- A 'Start at (last name):' text input field.
   
- A 'Sorted by:' dropdown menu with 'Client name, patient name' selected.
   
- A 'Printer (server):' dropdown menu with 'Microsoft XPS Document Writer' selected.
   
At the bottom right of the 'Printing' tab are 'Print' and 'Close' buttons.

When you manage your reminders, you can apply a grouping to avoid sending several reminders to the same client.

To print your reminders, select the Reminder type you wish to handle.

- In the “Printing” tab, use the Document drop-down menu and select the appropriate Mail Merge document (to create documents, see Module 7 or Module 13) you wish to print. Then click on the “Print” button. You can also choose within the following options:
- Group reminders for a client: This option will generate only one reminder document per client. If a client has several animals associated to this reminder, only one document will be printed.
- Group reminders for a patient: If an animal has several reminders of the same type, this option ensures that only one reminder is printed for that animal. For example, a dog might be due for DHPP and Rabies, each of which has generated a vaccine reminder.
- Split by language: Selecting this option prints reminders in groups based on the clients language. This warns the user before he goes from one language to the other.
- Split by species, language: Selecting this option prints reminders in groups based on species and clients language. It warns the user before continuing from one species/language to the next.
- Sorted by: This option allows you to select the print order, i.e. alphabetically by last name, by postal code, by identification number or by reference number.
- There is no option that allows you to pick several reminder types from different reminder groups to create one mailing for the client (for example: group vaccine reminders to heartworm reminders. If an animal is present in

two different reminder groups, there would be two reminder documents printed.

- Start printing at: Type in the client’s last name. This function can be useful if the original print job was interrupted.

To send your reminder by email: Select the reminder type that you want to send and then:

- In the “Sending by email” tab, click on the “Rmd. animail template” drop-down menu and select the appropriate email document you want to send. Then click on “Send”. You can choose the same grouping option as described before. To find out more about setting up an animail document, see Module 16: Animail Communications.



To export your reminders: Select the reminder type that you want to process and then:

- In the “Exporting” tab, select the format that you want (Excel or Text), then click on browse to determinate where to save your document by entering the name you want to give it. Finally click on “Export”



## Animal batch generation tab:

Used to create new reminder batches such as Heartworm, Geriatrics, etc. You can perform searches based on criteria (Species, Age, Sex, and/or by specific Products or Services sold to the patient).

In the left section:

- Inclusions/Exclusions: Click on desired Species/Breeds/Products/Services and use the Include or Exclude commands at the bottom.
- For Products & Services, indicate the “Sold between” date range that you wish to search.
- You can select several products. The software will select all the animals for which you sold at least **ONE** of the products. You can do the same thing for the services.
- If you select products and services in the same query, the software will select the animals for which you sold **both** items.
- If you do not select any species, breed, products or services, then all your clients will be selected.

In the right section - Other Criteria:

- These are extra criteria you can add up to your selection in the left section.
- Last Visit: You can specify whether a client has or has not been seen since a certain date.
- Vaccination – You can search for animals that have or have not been vaccinated since a certain date.
- Age: You can select animals “Younger than” or “Older than” a certain age.
- Other optional criteria include Sex/Sterility/Mixed Breed
- Once you select your criteria, type in a meaningful Description for this batch (i.e. Geriatric Dogs).
- Due Date: Indicate a due date and then select a reminder type for this batch.
- Distribute on: This option divides the batch in a number of specified days if there is a lot.
- Exclude batches: Used to exclude previously created batches. For example, when you create a batch of heartworm reminders, you could generate a batch for all dogs that visited the clinic in the past 4 weeks (for example, batch 1). Then when you create the larger batch for heartworms, you could exclude batch 1 from your search.  
When excluding several batches, enter the batch numbers separated by a comma without spaces (i.e. 1,2,3, etc.).
- Count: This option indicates the number and the percentage of animals found.
- Generate: This option creates a batch for printing and adds these reminders to each animal’s file.
- Return to the Management/printing of batches tab to continue with your mail merge.

Now let's see the other sub-tab, "List by generated reminder batch":

Reminder type	Batch #	Description	Number	Sent
Parasite campaign	126	Canine parasite reminder	571	0
Parasite campaign	127	Feline parasite reminder	209	0
Vaccine reminder	128	Feline vaccine	69	0
Vaccine reminder	129	Feline vaccine	100	0
Vaccine reminder	130	Feline vaccine	100	0
Vaccine reminder	131	Feline vaccine	100	0
Vaccine reminder	132	Feline vaccine	100	0

As previously explained, only the generated reminders will be displayed in this window. The description entered when creating the batch is displayed. If you created several lots for the same reminder type, you can see the details here. In our example, you can see: Parasite campaign lot # 126 and lot # 127.

You can print the reminders or send them by email directly from this window.

- Since these batches might contain a high volume of reminders, you can use the "Divide Batch" command to divide the printing job or email sent into smaller groups. (As in our example : Vaccine reminder lot #128 to 132)