Academy

SOLUTIONS VET

Module 18 - Quick Training Guide-Revised

Module 18 – Quick Training Guide

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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. Introduction

This module is intended for both new users and new employees of a veterinary clinic. It presents the various regular functions of your software.

All daily operations will be described and accompanied with a simple step-by-step procedure, including how to schedule an appointment, create a **Person** file and a **Patient** file, the entries in a file, create prescriptions, as well as make products and services sales.

Sometimes, there is more than one way to perform an operation with the software. Here we describe those recommended by the Solutions Vet team.

Please note that we are addressing the users that work in a paperless environment or to users working in a clinic or a hospital that has reduced the use of paper.

2. Session Opening

Let's begin by opening a session. Double-click on the « VetWare/LogiVet » icon displayed on your screen

The following screen will be displayed, asking you to enter your credentials:

Enter your User name and Password.

Your software will be configured according to your clinic's criteria. You can change the language if needed.

Here are the three language options:
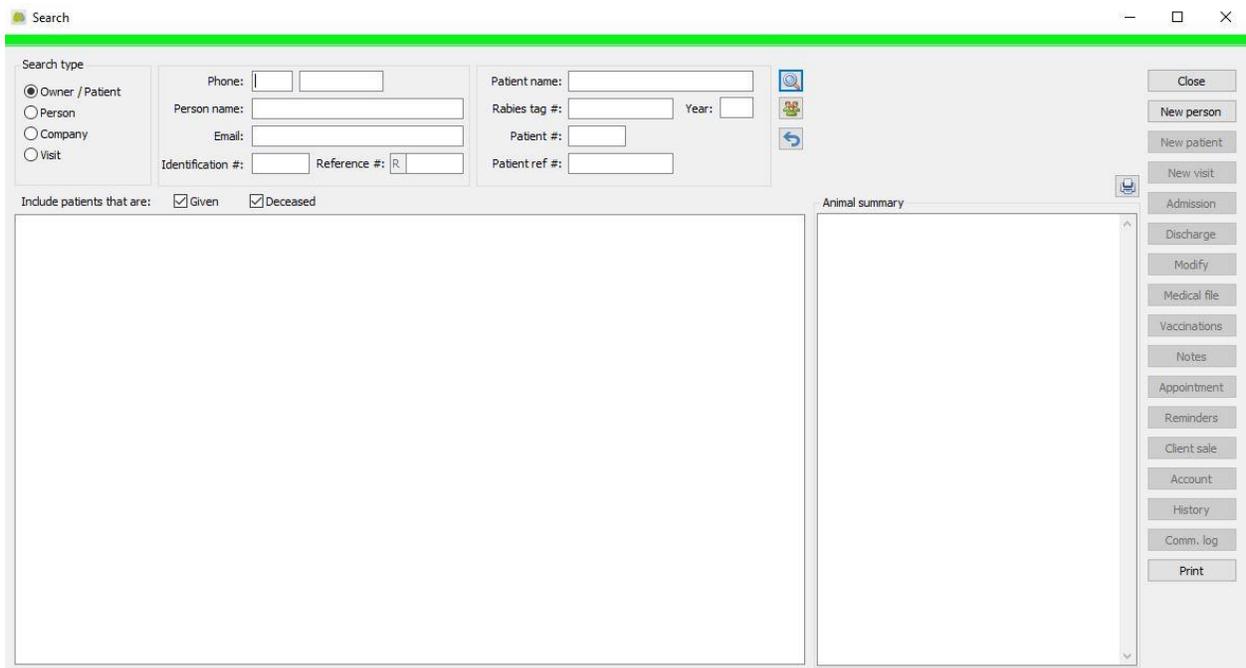**Default/User language, English or French.**
Then click on **OK**.

Upon your first login to the software, you will be asked to consent to the terms and conditions.

After consenting to the terms and conditions, you will have access to the VetWare taskbar

As well as in the search window including the Patient's summary:
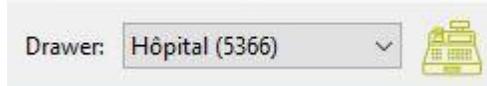
2.1 Overview of the Main Screen

Section 1:

These quick buttons are displayed in the tool bar at the top of the screen, right under the menu.

Search:	Opens a search window, where four (4) types of queries are available: **Owner/Patient**, **Person, Company** and **Visit**.
Invoices List:	Displays the invoices within a range of dates, with filter options.
Visit List:	Displays a customizable virtual whiteboard showing all visits and allows the user to filter information by assigned veterinarian, visit status, department, room, etc. You can remove or reorganize the columns, then save your customized settings for the current user.
Prescriptions List:	Searches for prescriptions by number and lists all pending prescriptions.
Counter Sale:	Is used to sell products to people that are not clients (no open file in VetWare at the clinic).
To-Do List:	Displays all reminders.
Internal Use:	This is a shortcut allowing you to scan barcodes of products used internally or of products for which there are no sales transactions but that must be deducted from the inventory.
Laboratory test:	Displays queries for lab tests sent, processed and completed
Appointment Book:	Launches the Appointment Book.

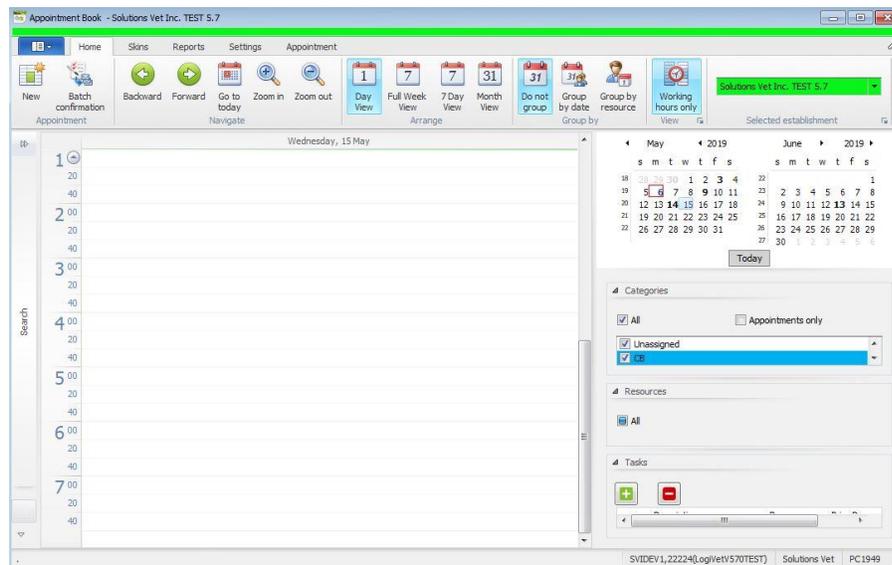**Section 2:** Managing cash drawers and shifts.

| Drawer:	To issue an invoice, you must select one cash drawer. You can use multiple cash drawers.
 Managing cash drawers and shifts:	To open and close your cash drawer. Manage shifts or print a report of revenues (detailed and summary).

 3.   Appointments and Visits

3.1 Booking an Appointment

Let's begin with the Appointment Book.

- Place your cursor on the desired time slot and right-click to display the context menu.
Then, click on "New".
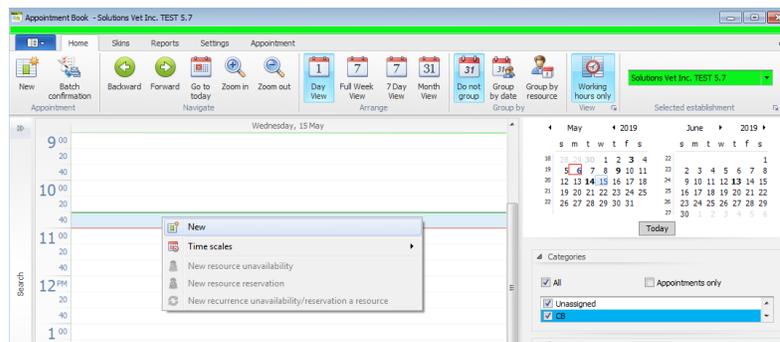
3.2 Creating an Appointment

- The "Edit Appointment" screen will be displayed. Click on the down arrow in the "Client" area. Perform a search either by phone number or client number by clicking on the magnifier icon. If this client has not been created in your database, you need to create a file for this new client.

Click this icon to open a new file:
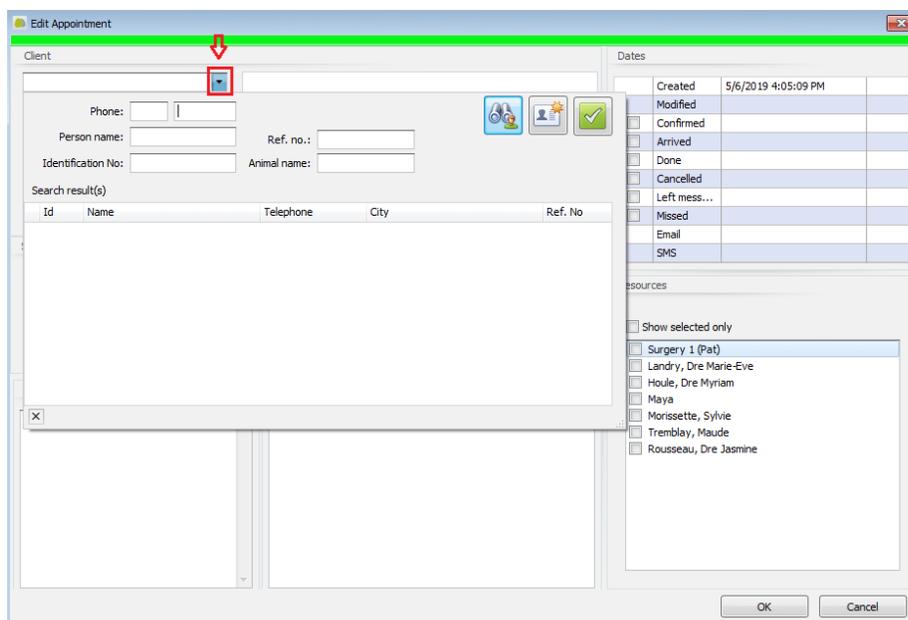
From the "**New Person**" window:

- Create the client file by entering his contact information and the patient information as well.

Click on **OK**. The information will then be transferred to the "**Edit appointment**" screen.

- In the drop-down menu, select the category for the appointment.
- Enter a brief description of the reason for the appointment.
- Select the reason for the appointment from the drop-down menu. If you want this reason to also be displayed in the description window you can activate an option in the configuration under general options> appointment book
- Place a checkmark in the box next to the patient's name and select the assigned veterinarian. Click on **OK**.

Note: You can send appointment confirmation notices by email and SMS. To learn more about this function, see Module 16 – animail Communications.

4.   Confirmation of Client Arrival and Visit Creation

4.1 Confirming the Client's Arrival

When the client arrives with the patient, you will need to go back in the Appointment Book to find their appointment.

Position your cursor on the appointment range, right-click to display the context menu, and then select "Arrived".
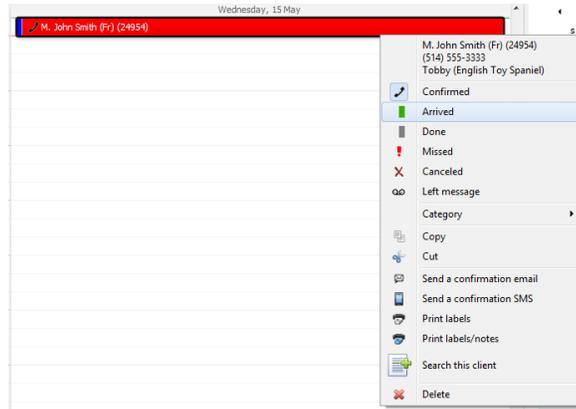

4.2 Creating a Visit

After you have selected "Arrived", the next screen will be displayed:
From this screen, you can simply click on **OK** or you can create a new visit for the patient:
- Enter the patient's weight, if desired
- Enter the reason for the visit or select an answer to a reminder
- Add notes
- Assign a veterinarian, indicate the referral type (if mandatory in your clinic's policy)

Now let's complete the **Person/Patient** file**.**

From the client's appointment, right-click on the appointment and select: "find this client"
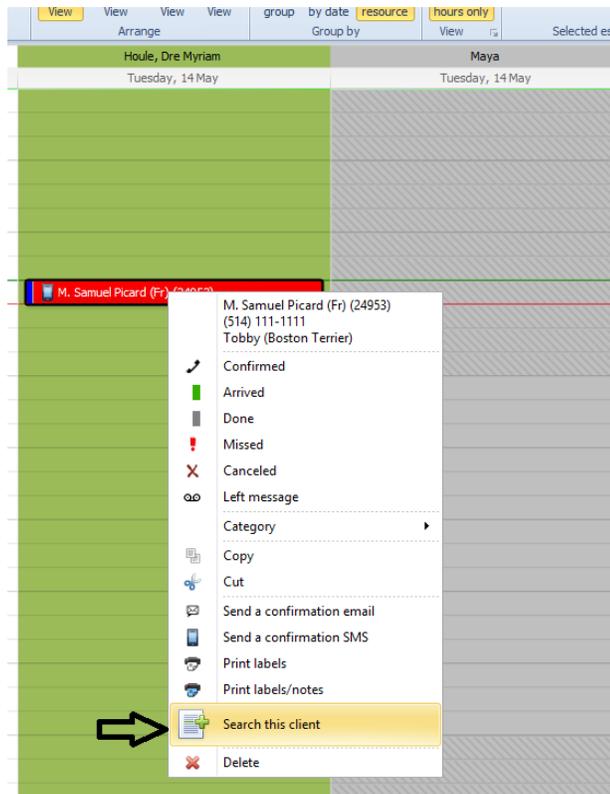
- Enter and double-check the missing information in the client file. (If you have enough time,
you could ask the client what his Communication preferences are. We will discuss this subject later.)
Double-click on the client's name or click on the button **Modify** to display the Person file.

Add the contact information for the person and other information, for instance:

Supp. info. Supplementary information: Here is where you would mention if the person is a
veterinarian or an employee, set up their user account, apply a discount, taxes and service fees.

See Module 1 - Overview/How to log in to find out more about the search window and the
Person/Patient file.

Comm. pref. Communication preferences: With the Communication preferences function, your
clients will be able to let you know their communication preferences for the various types of
reminders, invoices and statements of account that they receive from you. By default, all types of
communications are checked "**Accepts**". Confirm with the client's preferences.
To learn more about this functionality, see module 17.

Comm. log Communications log: This is where you would be able to view the log of all communications sent to the client (SMS, emails, etc.). The history is also displayed in the upper part of the screen SMS Communications. To learn more about this functionality, see Module 16 - "animail" Communications.
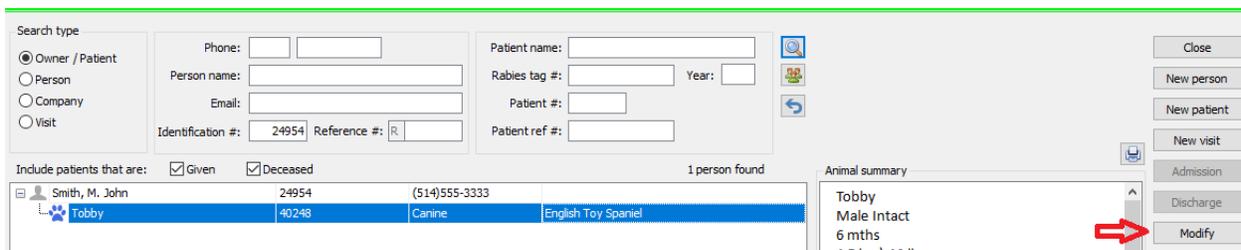

Notes You can add important notes about this client. Notes will only be displayed internally.

After having entered all information, click on **Save.** You will be redirected to the search window. Then click on **Close.**

 The Patient file

From the **Client/Patient** file:

- Select the patient then click on the **Modify** button (or double-click on the patient's name).

Enter the following information: weight, age, sex (whether intact or not), breed and patient colour. You can update the vaccines and include a vaccination program. You can also add the patient's picture, their behaviour and special notes about them.
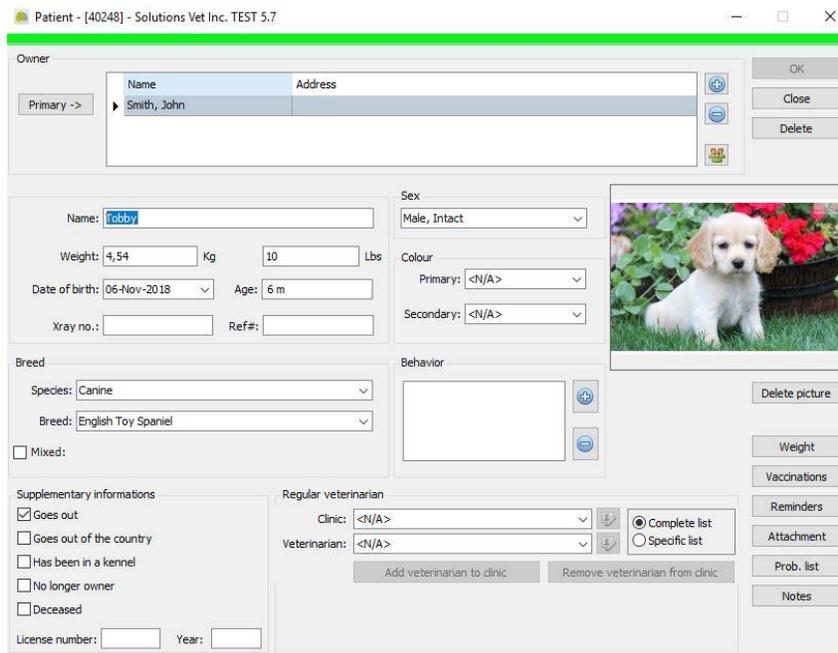
4.3 Visits List

The Visits list allows the user to access the clients and patients' files, as well as their medical file. This tool helps you manage medical cases and follow the patients' on premise.

As soon as a visit is open in the system for a patient, the veterinarian will know that the patient has arrived at the clinic.
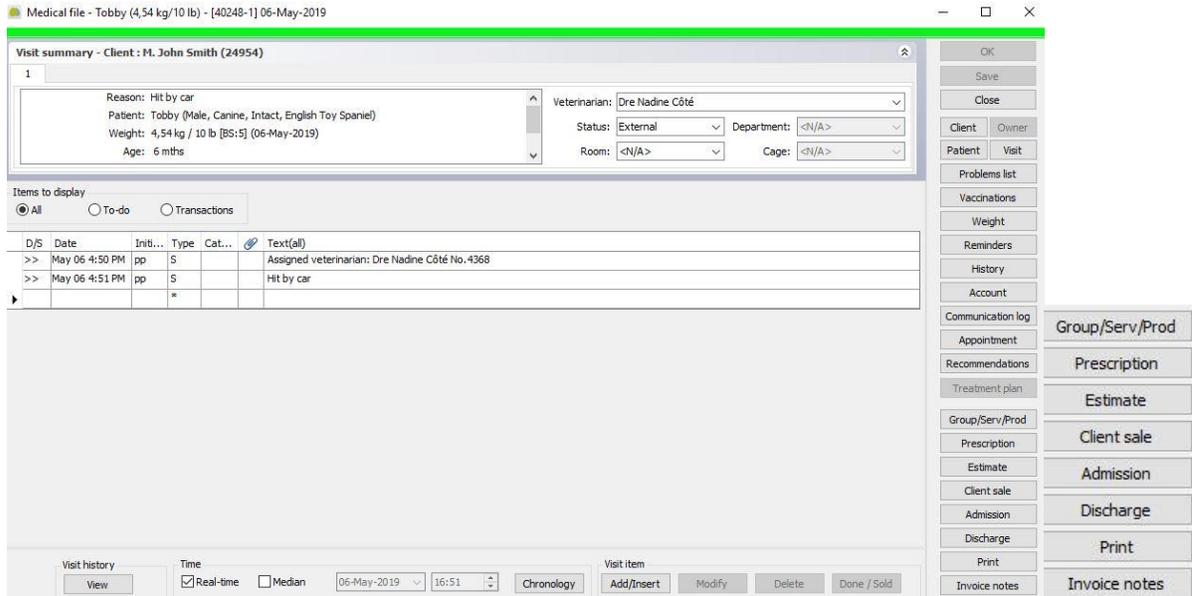

From the Visits list, select the client and click on **Medical file** or simply double-click on the visit.

For more information, see module 15 – Visits List.

5. Medical file

You have access to the medical file from the visits list or by selecting the patient, then clicking on the visit (in the search window).

The **Medical file maintenance** screen will be displayed:

In the top caption bar, you will see the following information: patient's name and weight, patient's identity number, visit number and creation date for the visit.

Right under this, there are numbered tabs that correspond to each visit registered in the medical file. The reason for the visit is displayed to the right of the tabs. You can click on the various tabs to see the information about the previous visits or you can use the arrows to scroll through the information.

Since there are several types of entries in a medical file, we will do a brief overview of the medical file. For more information, please refer to Module 5 – Medical Files.

5.1 Entries in a Medical File

The first entries for the new visit will include all subjective notes entered when the new visit was created, for instance the assigned veterinarian, the patient's weight, etc.
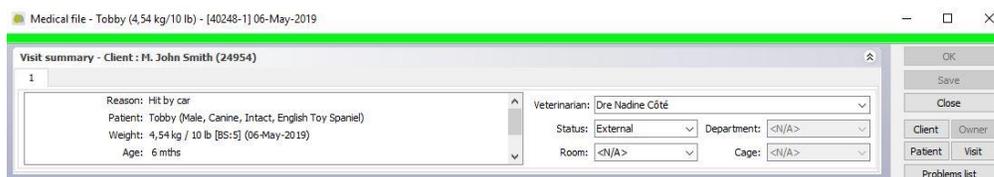
Use the buttons on the right to enter different actions linked to the visit, such as: group/services/products, prescription, estimate, client sale, etc.

Each entry in the medical file displays the user initials, as well as the date and time of the entry. The application allows multiple users to access simultaneously the <u>same visit</u> and to modify it. However, the application *does not allow* multiple users to modify the <u>same transaction</u> simultaneously.

When the visit ends, the veterinarian may choose to close the visit or keep it open to later add more information.

5.2 Attachments

Use this function to add external files to a patients' medical file, such as lab results, digital x-rays, etc. The application supports different types of files.

To add a file, you must select the line to which you want to attach a file then click in the paperclip column. Then click on the Add button to choose the file you wish to attach
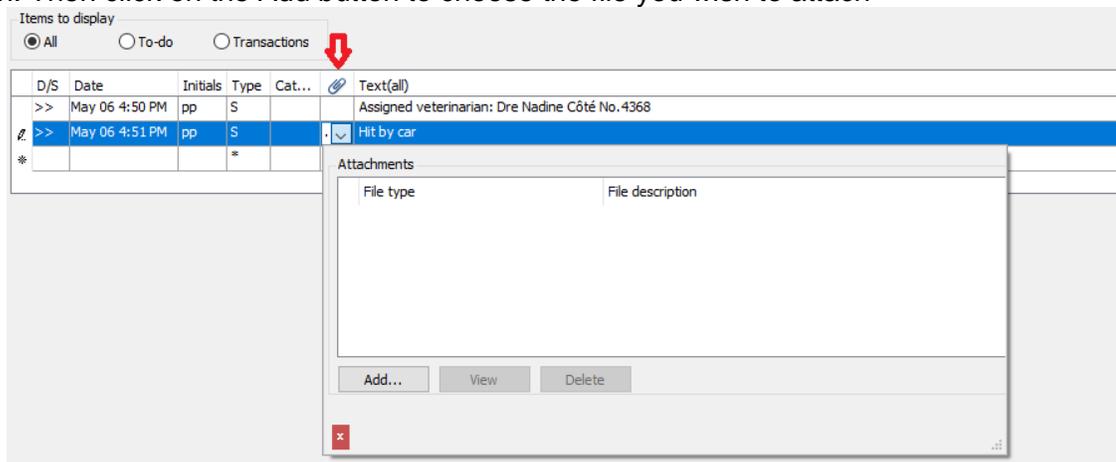
On the next screen, you can locate on your computer the file you want to add. After selecting your file, click on **Open.**

In the appropriate space, enter a description about the attachment.

A new line will be displayed in the medical file, right under the selected line, indicating the presence of an attachment. The description you just entered is displayed here.

D/S	Date	Initi...	Type	Cat...	📎	Text(all)
>>	May 06 4:50 PM	pp	S			Assigned veterinarian: Dre Nadine Côté No. 4368
>>	May 06 4:51 PM	pp	S		📎	Hit by car + Attachment (Picture - JPG): X-Ray
▶			*			

Remember that you can display the complete list of attachments for a particular patient from the button **Attachment** in the **Patient** file.

5.3 Prescriptions

When in a patient's medical file, click on the **Prescription** button (located on the right hand side of your screen).

Search for the medication by **Description** or by **Category.**
Select the appropriate medication and fill in the dosage and click on **Calculate/Quantity**.
The right amount will fill in automatically in the field.

The text on the prescription label will reflect the dosage. You can add a warning message on the label by placing a checkmark in the box **Warning Message.** If there are existing messages previously set up in the system, you can access the list by clicking on the down arrow. You can also

create a new message by writing the text directly in the field. To save a new warning message go to configuration> table> Warning message

To fill the prescription and print the label, you need to place a checkmark in the boxes **Fill** and **Print** (whether the prescription is filled at your clinic or elsewhere).

6. Product sales and invoice payments

*The functions **Counter Sale** and **Client Sale** allow staff to sell products* without having to create a visit.*
*This excludes the products that are set up in the catalog as "Prescription drug" or "Controlled Substance".

6.1 Counter Sale

The **Counter Sale** function allows the clinic to sell products to people that are not clients in VetWare, meaning that the sale would not be linked to a specific person or patient. Click on Function in the menu, then select **Counter Sale…** or use the shopping cart icon **Perform a Counter Sale** in the toolbar:
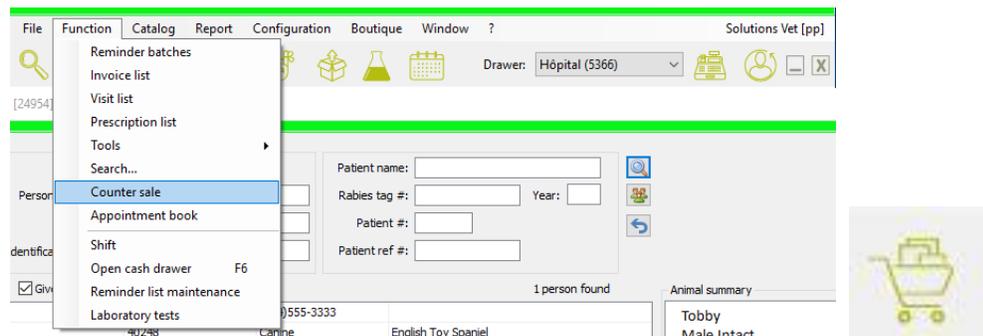
- By default, the cursor is located in the **Description** field.
- Enter the product description or scan the article with your barcode scanner.
- Select the appropriate product, then click on **OK** or double-click on the product.
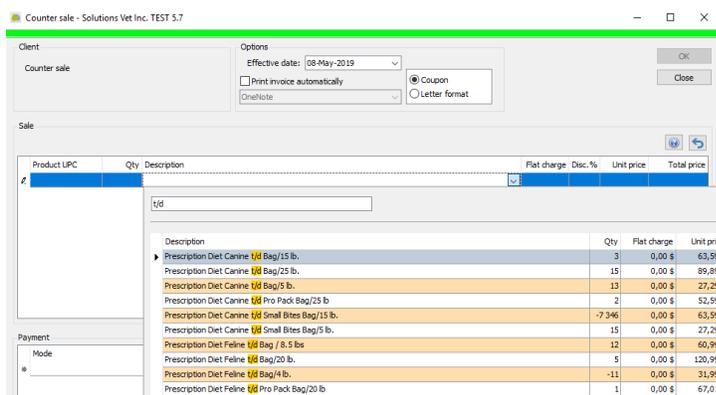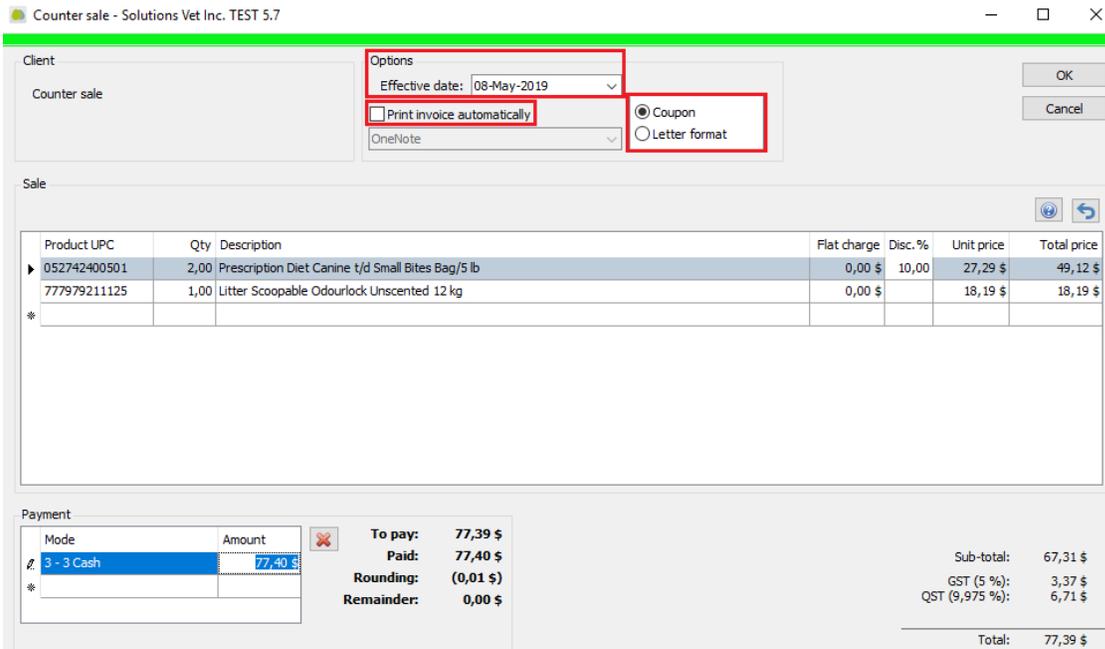
- You will be redirected to the client sale screen and the cursor will be in the quantity field (**Qty).**

- Enter the quantity, and then the total cost will be displayed.

- If you want, you can enter a discount percentage. The taxes and the total will adjust automatically.
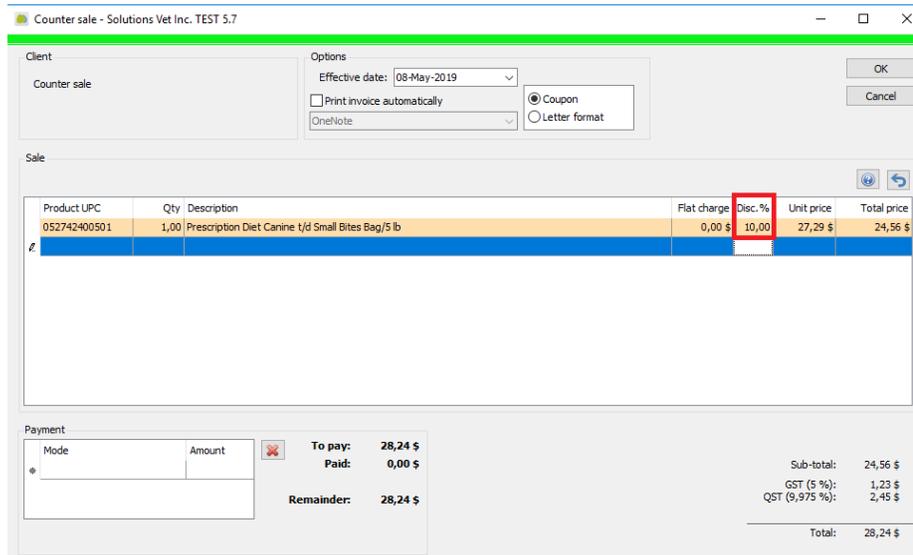
- Use your tab key to add more items on the invoice.

- Note: When you use a configured barcode scanner, you can scan the product regardless of where your cursor is located. The UPC and the description will be displayed automatically in the appropriate fields.

- Also, when you scan several items, the system will automatically add a "1" next to each item in the **Qty** field, which will allow you to sell products quickly and efficiently without having to use your keyboard or your mouse.
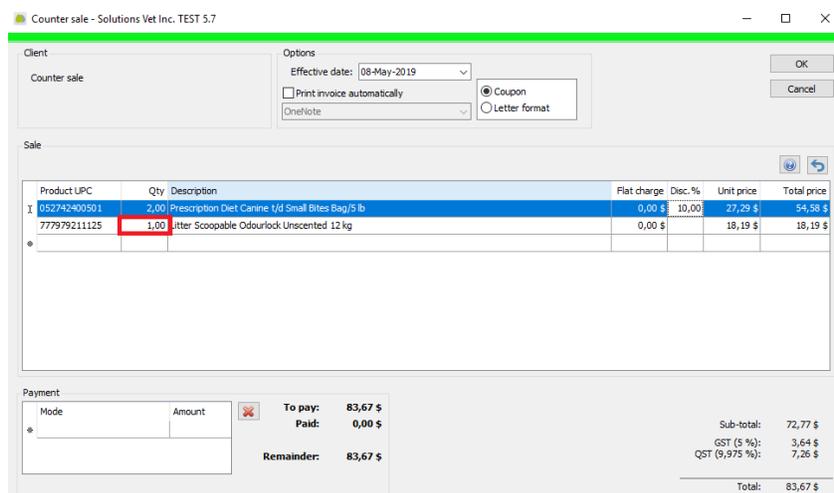
- Use the [↩] button to *delete* the selected line.
- If necessary, modify the **Effective date** field.
- If you wish to print an invoice, place a checkmark in the **Print invoice automatically** box and then select **Letter format** or **Coupon**.

6.2 Counter Sale Payment

- In the **Payment** section (at the bottom left), click on the drop-down and select a payment mode.
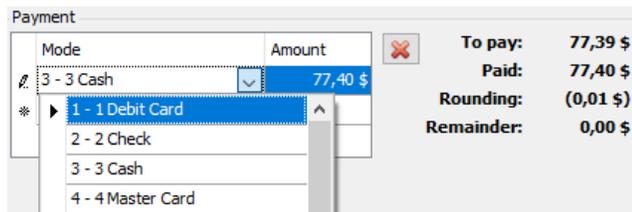

- By default, the total amount to pay will be displayed in the **Amount** field, but you can modify this amount if required to.

- If you need to add another payment, use the drop down menu to select another **Payment mode**. Please note that there is no limit to the number of payments you can enter for the same invoice. Since counter sales are not linked to the clients, they must be paid in full.

- Use the [✖] button to erase all payment information and start over.
- Click on **OK** to close the sale operation and the invoice.

6.2.1 Visit Payment and Client Sale

Select the patient's visit, and then click on the **Account** button.
The following screen will display details of the cost of the visit and products sold:
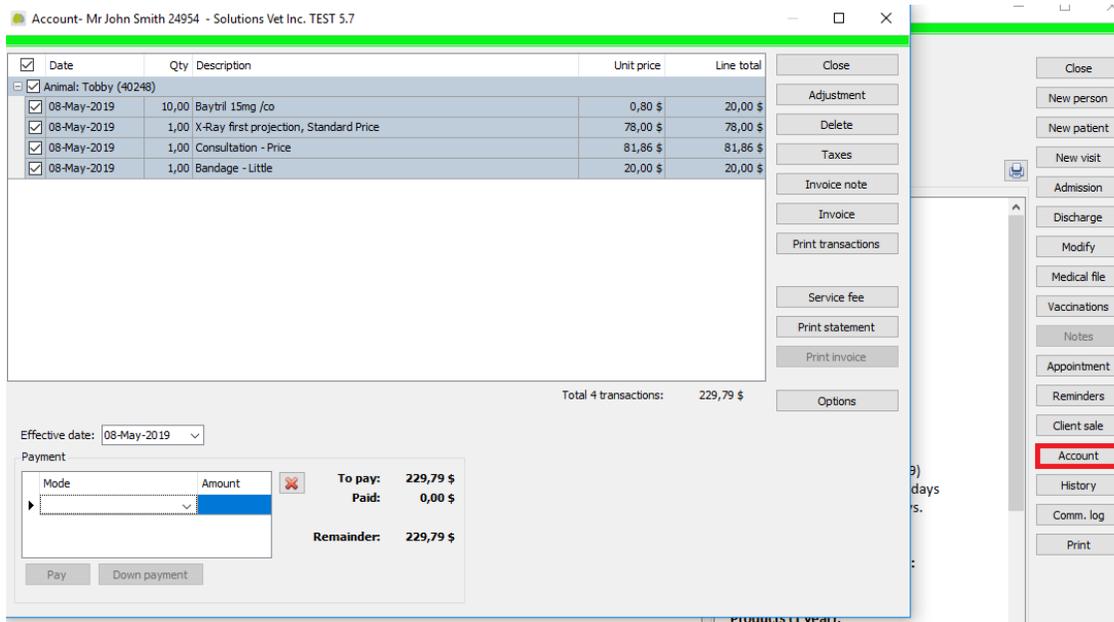
Click on **Invoice** to invoice the transaction to the client account.
Or: Select the payment mode, indicate the amount paid and click on the **Pay** button (at the bottom).

Note: When you make a payment from a **Client** file, the difference will be charged to the client's account if they make a partial payment.
- To receive funds from a client, follow the same steps than those for a counter sale.

6.3 Invoice Printing

Click on the **Options** button to choose how your invoice will be printed (Letter format or Receipt coupon).
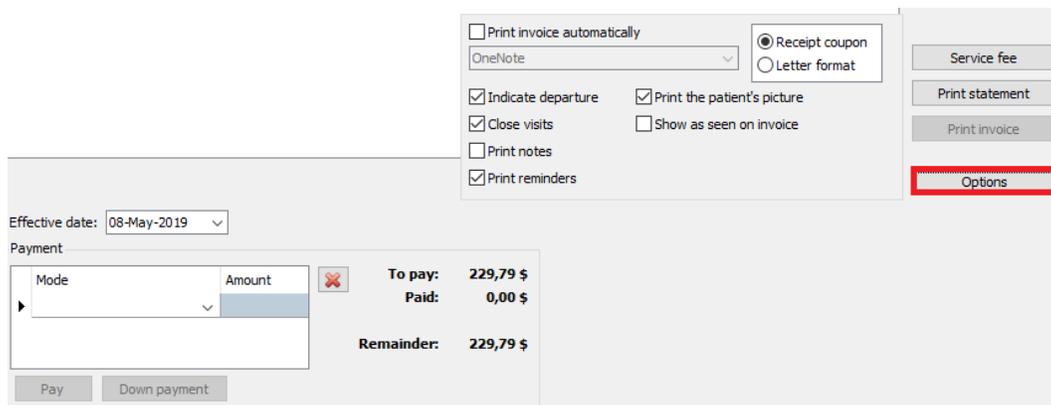
Here is what a **Letter format** invoice and a **Receipt coupon** look like. Note that invoices cannot be deleted or modified under any circumstances, client and clinic information will always be those valid at the time the invoice was generated.