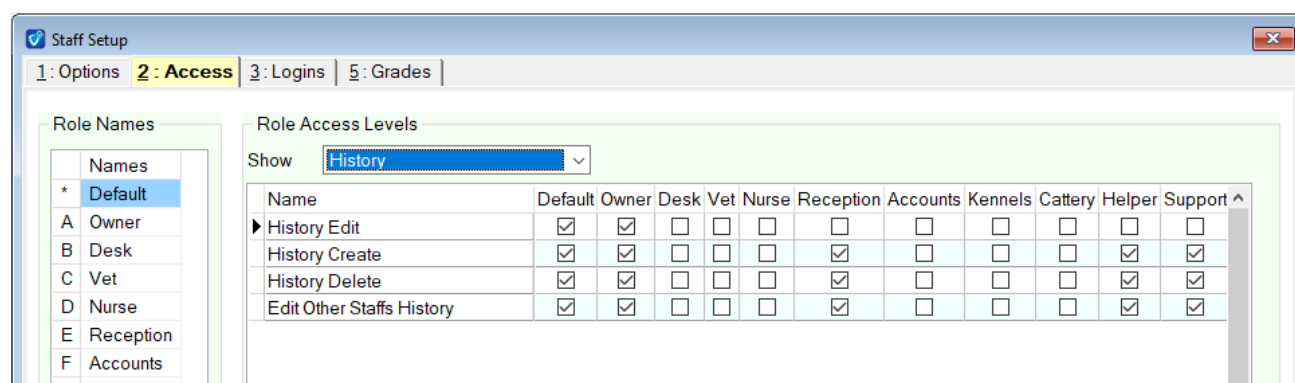# PATIENT CLINICAL HISTORY

CONTENTS

OVERVIEW

The Patient Clinical History is used to manage Patients' visit details. Information such as clinical notes, weight and temperature can be recorded in the Patient visit history. A new visit history page is used for each individual visit.

There are several methods of recording, updating, and looking up visit histories. In the following sections we will discuss the most efficient and most frequently used methods.

HISTORY ACCESS LEVELS

To check your settings for these go to **Options | Setup | Staff | Access**, change category to **History** and enable access for levels as required**.**

CLINICAL HISTORY

Starting Clinical History from the Diary

1. Right click on the client's appointment and select **History**.

2. If a bill has already been started for this appointment you will be taken straight to the clinical history form. If a bill has not been created for the appointment you will be prompted with a message to create a new bill, click **Yes** to this question.

    a. If there are any open bills for this client, you will be asked to start a new bill or add to an existing bill.
        i. Select **Yes** to use an existing bill
        ii. Select **No** to start a new bill.

3. Depending on your setup and if a history already exists two things may happen.
    a. A blank history page will open (You can select your favourite history form to open in setup).
    b. A history creation form may appear where you can select the type of History to add.

4. Edit the History as needed.

Starting Clinical History from Billing

VetlinkPRO allows you to record the Patients visit history directly from a bill. The bill is split into two tabs. The bill tab lists bill items, payment methods etc., while the history tab is where you can write a detailed history of the Patients visit.

1. Open a new, existing, or finished bill.

2. Click on the **History** tab.

3. Depending on your setup and if a history already exists two things may happen.
   c. A blank history page will open (You can select your favourite history form to open in setup).
   d. A history creation form may appear where you can select the type of History to add.

4. Edit the History as needed.

Starting Clinical History from the Update History Menu

The Update History menu is used as a quick method for finding and updating previous day's histories. The Update History menu will list each of the last seven days and have a client search function. By clicking on one of the days you will then be taken to a history screen that will list all the bills for that day. You can then choose the bill you want to update history for and be taken directly to the history that is attached to that bill and client. If you search by client you can then find the bill you want to update history for and be taken directly to the history form too.

1. Click on the **Bill** button on the main toolbar.

2. Click on the **Update History** button.

3. Select the day where the bill you want to add clinical history to was created. If you do not know the day or it is older than 7 days click on the **Find Client** button to search by client and bill.

4. A new form will open that will display all the bills that were made for that day.

5. Double Click on the bill you wish to update the history for.

6. Depending on your setup and if a history already exists two things may happen.
   a. A blank history page will open (You can select your favourite history form to open in setup).
   b. A history creation form may appear.

7. Update the clinical history as needed.

Adding Written Notes to Clinical History

1. From an open history select **Add Page**.

2. Under **Type** select **Form** and in the **Form** field select your favourite history form.

3. Check **Doctor**, **Date** and **Summary** are correct.

4. Click **F12 : Accept**.

5. A blank form will open where you can type up notes as needed (special functions like history abbreviation can be used to enter notes quickly.)

6. Finish editing history as normal.

Attaching PDF / Images in Clinical Notes

Click the **Attach Files** button located in the clinical history page and then browse to the location of the file you want to attach.

Drag And Drop Clinical notes/ Doc Manager

You can drag and drop files into the clinical history or the document manager.
- Left click and hold on an item from your desktop and drag to document manager or the history summary grid in clinical history.
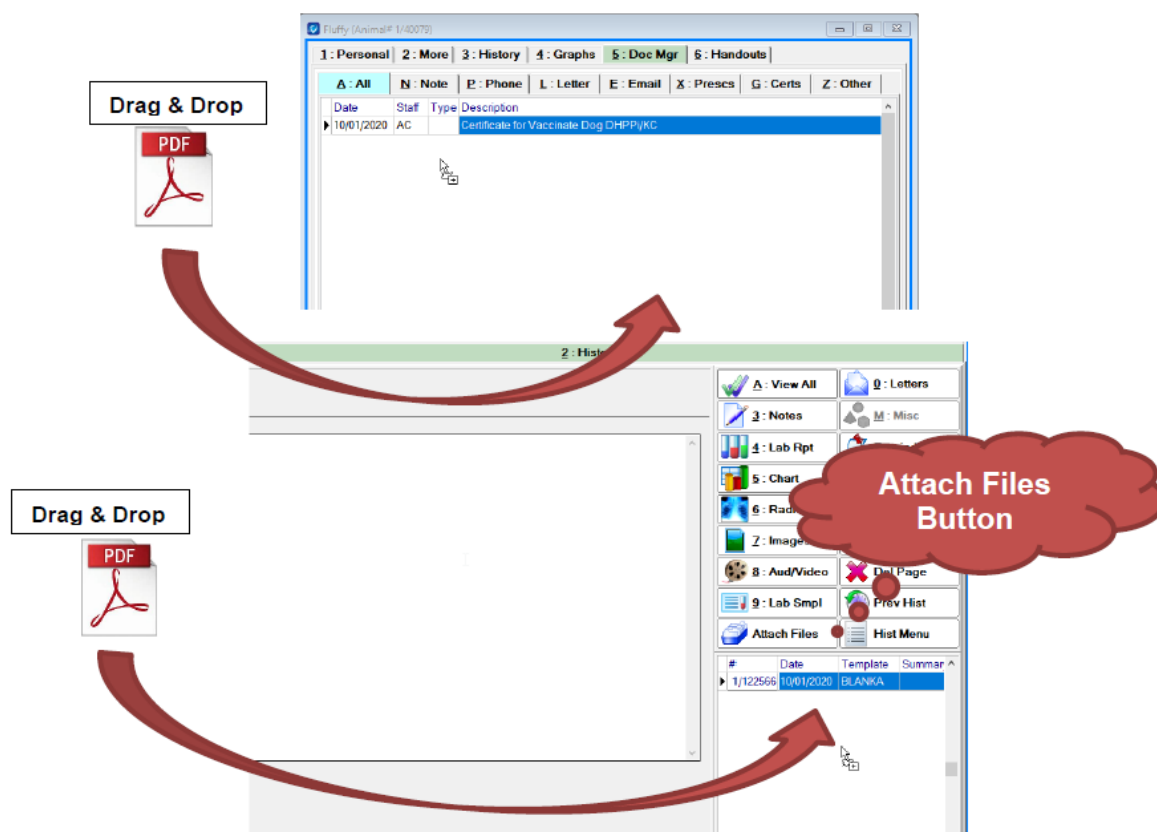
Deleting a Clinical History

If a clinical history has been added by mistake you can delete the page.

1. Find the bill/history in question.

2. Select the page to be deleted.

3. Click **Del Page** from the buttons on the right, OR right-click the page line and select **Delete Page**.

History Templates

VetlinkPRO can save your most common clinical histories as a template. These templates can be used to quickly create a clinical history for an Patient with some default information filled out. The histories can then be edited to add any extra details specific to the Patient.

Creating a History Template

1. Go to **Options** menu and select **Picklists Setup**.

2. Select **History** and then **History Templates**.

3. Click on the **+** button and a history creation form will open.
   a. Enter the doctor's staff ID that is writing the history.
   b. Enter the type of history page you wish to create.
   c. Enter the date for the history.
   d. Enter a summary of the history you are creating.
   e. Click **F12 : Accept** to create the blank history page.

4. Type the notes you wish to use for the history template.

5. Click **F12 : Accept**, then **Yes** to save the template

Using a History Template

1. From the bill click on the **History** tab.

2. Depending on your setup the **Create New History** form will open or your blank default history form will open. If your default form automatically opens you will need to click on the **Add Page** button.

3. In the bottom right hand corner of the **Create New History** form click on the **F9 : Use Template** button.

4. Search for the template by its summary field name.

5. Choose the template and click **F12 : Accept**.

6. The history will now be loaded and can be edited to suit each case.

History Abbreviations

History abbreviations are used to quickly enter words, sentences or phrases. When you type in an abbreviation and press the spacebar it will enter the word, sentence or paragraph in full.

A common example of the usage of this feature is the abbreviation of the word 'antibiotic'. Just type 'ab', then press the spacebar, and the word 'antibiotic' will appear. You can use an abbreviation for a word, phrase, sentence, or paragraph up to 256 characters long.

1. Click on the **Options** menu and then select **Picklists Setup**.

2. Click on **History**.

3. Double click on **History Abbrs**.

4. Click the **+** button.

5. Click **Ok** to the insert new record prompt.

6. Type in the abbreviation you would like to use – e.g. **'ab'**.

7. Type the word or phrase out in full. E.g. **'antibiotic'** or **'antibiotic drugs'**.

8. Click the tick symbol in the bottom right-hand corner.

9. Click **Exit**.

Copy Previous History

In a number of situations clinical notes may be repetitive. These include repeat prescriptions or revisits with similar problems. VetlinkPRO enables users to quickly enter similar clinical notes with the **F11 : Copy Last** and **F10 : Copy Any** functions. These buttons are found on the history creation form. Depending on your set up the history creation form will open the first time you create a history or by clicking on the **Add Page** button.

Copy Last History

Selecting this option will simply copy all text from the most recent previous history entered into VetlinkPRO (not client specific) to the current new page. You may then edit the contents as required.

Copy Any History

Selecting this option will simply bring up the History browser so that you may select the history that you wish to copy over. Simply select the history you wish to use and select **'Copy'**.

AUTOMATIC FILE ATTACH FEATURE

VetlinkPRO can attach a variety of different files to client, Patient, product, and supplier records, as well as Patient clinical histories automatically, based on the name of the file. This is achieved by placing the files into a special folder called **VL2ATTACH** that is created on the same drive as your VL2 folder. VetlinkPRO continuously checks this folder and any files placed here will be imported automatically and then removed from the VL2ATTACH folder. Files attached to clinical history will also go into the **Endorse Lab Reports** window so users can double check files have gone to the correct clinical history or move it to the correct Patient if there is a mistake.
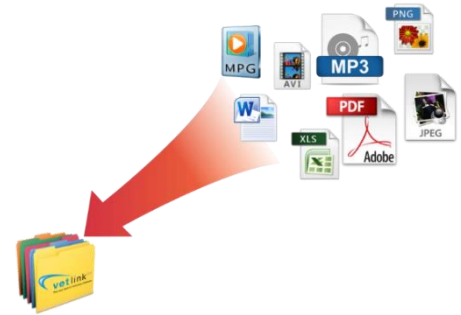
Accepted File Types
PNG, JPG, JPEG, BMP, GIF, DCM, PDF, MPEG, MPG, AVI, WAV, MP3, DOC, DOCX, XLS, XLSX

File Naming
The naming convention for attaching files is as follows:
- The first character is an alphabetic character, anyone of **A, P, C**, or **H**. This indicates the file destination within VETLINKPRO. A description of each is shown below.

A	Patient/Patient document manager
P	Patient/Patient document manager
C	Client document manager
H	Clinical history attachment

- Only ex-merging users that have some records starting with different numbers i.e. 2/1234 or 5/6789 will need to follow this step, all other users can skip it entirely. The next two characters are a number followed by '**-**', such as '**1-**', used to indicate the branch number. In non-merging, single database environments these characters can be excluded.

- The last portion of the file name is a number consisting of a maximum of 11 digits indicating the record number the file is to link to. If the intended file destination is a document manager, use the record number as displayed in VetlinkPRO (client number, or Patient number etc.). If the intended destination is clinical history use the Patient number, the file will attach to the last open bill if present otherwise one will be created.

- E.g. **A12345.DOC** will attach to Patient #12345's document manager
  E.g. **A1-12345.DOC** will attach the Patient #12345's document manager
  E.g. **H12345.JPG** will attach to the clinical history of the last OPEN bill for Patient #12345
  E.g. **C98765.PDF** will attach to client #98765's document manager

- A description can be added by adding a space after the Patient / client number then typing in the name. E.g. "C22592 Credit agreement.pdf". When imported any text after the Patient/client number and the space will be used as the description in VetlinkPRO

FILES 2 SERVER SERVICE (AWS)

The files2server service has been created to make it easier to input files from your local Windows PC into VetlinkPRO in the Cloud.

Normally to copy a file from your local desktop to your Cloud version of VetlinkPRO you would have to copy/paste from your desktop to the cloud desktop, then copy again into the VL2 attach folder or search for the file from VetlinkPRO.
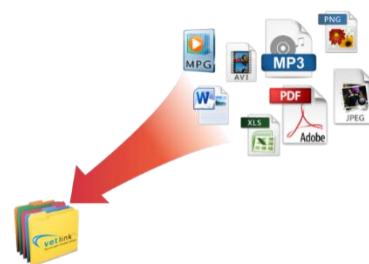
The Files2Server service works as an extension of the VL2Attach folder onto your local desktop. So once the service is installed, if you place a file with a specific name into your designated local folder, it will copy the file to the VL2Attach folder on your cloud server, then based on the filename VetlinkPRO will import from the VL2attach folder to a record in VetlinkPRO.

The most commonly used filename for the VL2attach folder are:
- **C + Client Number e.g. C1234**: The file will get imported to the client document manager.
- **A + Patient Number e.g. A1234**: The file will get imported to the Patient document manager.
- **H + Patient Number e.g. H1234**: The file will get import to the last open bill for that Patient. If no open bill exists a new bill will be created.

Examples of files 2 server use:
- Attachments in email. E.g. If you receive an email attachment you can save the file to your files2server folder on your local computer with one of the filenames above. The file then gets automatically transferred to the cloud server then based on the filename it gets automatically linked to the client, Patient, or history record.
- X-ray Machine. E.g. If your x-ray machine can export images with a filename as above you can save the images to your Files2Server folder on your local workstation, the image then gets automatically transferred to the cloud server and based on the image name gets automatically linked to an client, Patient, or history record.

Please contact the software support desk to set this up.

VIEWING & PRINTING CLINICAL HISTORY

Printing Patient History from the Diary

1. Right click on the clients appointment and choose **'Print History'**.

2. Select the history you wish to print from the bottom of the menu.

Print Last History:	Prints the last history for the Patient on the appointment you have selected.
Print All Histories:	Prints all histories for the Patient on the appointment you have selected.
Print Last 3 Histories:	Prints the last 3 histories for the Patient on the appointment you have selected.
Print History (HTML):	Prints histories in the same format as the HTML History Browser. You have more advanced options to choose which history to print as well. These include; ▪ Print all histories ▪ Print histories between date range ▪ The number of histories to print ▪ Types of histories to print. ▪ Exclude product prices ▪ Include histories linked to items of particular classes
Print History (Advanced):	Prints histories with more advanced options. These include; ▪ Print all histories ▪ Print histories between date range ▪ The number of histories to print

History Slide Show

Features of the History Slide Show

The history browser is divided into four parts which are separated by black lines. The black line is adjustable. By dragging the line with the mouse each section can be made bigger or smaller depending on the user's preference.

Top Left:	Displays the details of the history that the user has selected from the list in the bottom screen.
Top Right:	Displays the bill items that are attached to the history selected.
Middle Right:	Displays any scripts that are on the bill.
Bottom:	Lists a summary of all histories for the Patient selected.

Accessing the History Slide Show

From the Diary:	Right click an appointment, click on **'History'** and select your preferred browser.
From the Billing Screen:	Change to the **'History'** tab, click on **'Prev History'** and select your preferred browser.
From the History Page of the Billing Screen:	Press **'F8'** on the keyboard.
From an Patient Record:	Click **'Actions'** and select your preferred browser. Also while in the Patient Record press **'F8'** on the keyboard.

Printing From the History Slide Show

The history slide show allows you a number of options to print the clinical histories. To print clinical histories from the history slide show click on the button at the bottom of the window and choose one of the options outlined below.

Patient History (Current Bill):	Prints the clinical history you currently have selected in the history slide show.
Patient History (Last Bill):	Prints the clinical history from the most recent bill.
Patient History (All Bills):	Prints all the clinical histories.
Patient History (Last 3 Bills):	Prints the clinical histories from the last three bills.
Patient History for Med. Insurance:	Prints the clinical history you currently have selected in the history slide show but will print with the GST number.
Patient History (Selected):	Prints the clinical history you currently have selected in the history slide show.
Patient History (Advanced):	Prints histories with more advanced options. These include: ▪ Print current (selected) history ▪ Print last history ▪ Print all histories ▪ Print histories between date range ▪ The number of histories to print

History Browser

The history browser will list all clinical histories in chronological order in one list. The browser is split into 3 sections; the left hand side has the display options for viewing and selecting the histories to show, the middle section will show the written clinical history while on the right hand side you will see the bill items and scripts that are attached to the history.

Features of the History Browser

Flexible Date Selection:	Select the start and ending dates to view histories for.
Note:	An intelligent note will display if histories are being hidden because of the date selection.
Filter Options:	Allows you to selectively view relative entries in a bill. You may select any combination of **Retail**, **Drug**, **Service**, **Fee** and **Materials**.
Search:	You can easily look for a keyword in your list of current histories, enter a keyword in the **'Find Text'** box then click the **'Find'** button. To find the next instance of the keyword click **'Find'** repeatedly, VetlinkPRO will step you through all matching words until it reaches the last one.

Accessing the History Browser

From the Diary:	Right click an appointment, click on **'History'** and select your preferred browser.
From the Billing Screen:	Change to the **'History'** tab, click on **'Prev History'** and select your preferred browser.
From the History Page of the Billing Screen:	Press **'Shift+F8'** on the keyboard.
From an Patient Record:	Click **'Actions'** and select your preferred browser. Also while in the Patient Record press **'Shift+F8'** on the keyboard.

Printing From the History Browser

Through the HTML browser, advanced print options are made available. The printed report is formatted as seen on the screen, all images and letters are printed in line with the remaining history content. Several print options are available making it flexible and easy to use. The screen below shows the available print options including ability to include or hide prices and exclude certain type of histories.

Print History Menu

The history menu provides quick and easy access to Patient clinical history, no matter how your system is configured this menu system will always behave in the same manner. From this menu you may view and print client visit history.

1. Click on the **'Bill'** button and then on the **'F2: Print Hist'** button.

2. A client search window will appear, search and select the client record.

3. An Patient search window will appear, search and select the Patient record.

4. The history toolbar will now open,
   a. Click on the **'Print 3'** button to print the last 3 histories
   b. Click on the **'Print All'** button to print all histories.

5. Depending on your system configuration;
   a. The clinical history will automatically print out.
   b. The clinical history will open and preview on screen. You can click on the print icon at the top of the page to print the history and then click the **'Close'** button to close the preview.
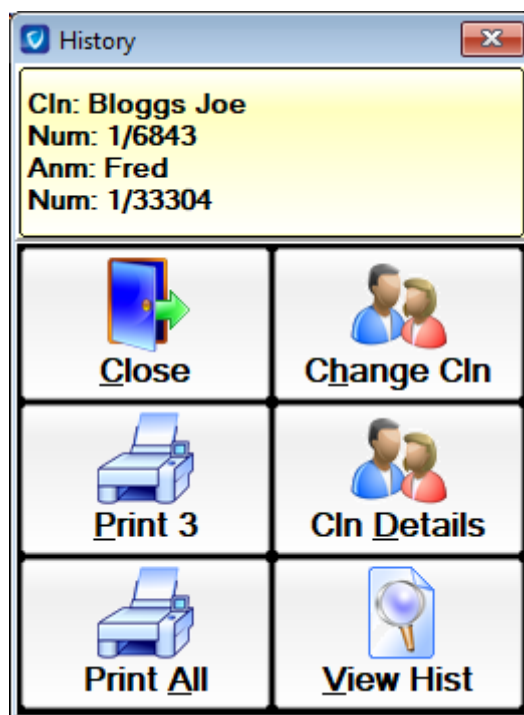
Emailing History

Emailing history is an easy way to send patient histories to other vet clinics/specialists that require the patient's history.

1. Open the Patient record and select **'History Browser'** from the Actions menu in the bottom right.

2. Click the **'Email'** button in the sidebar. This will open the email options window.

3. Select the options to narrow what is sent including hiding prices and date ranges etc.

4. If you tick **'Remember My Settings'** this will save the current settings as the new default for future emails.

5. Select **'F12: OK'** once you have selected your settings.

6. The HTML editor will open to allow formatting of the email.

7. Click **'Send Now'** to send the history.

HISTORY DIAGNOSIS

The history diagnosis section is used on history forms when diagnosing Patient's symptoms. You can either create and use your own diagnosis codes, use the already available Massey University codes or import and use VeNom codes.

Selecting a History Diagnosis Structure

1. Go to **'Options'** and then **'Setup'**.

2. Click on the **'History'** button.

3. In the drop down select which Diagnosis system codes you would like to use.

Massy University codes

Editing History Diagnosis Fields

1. Go to **'Options'** and then **'Pick Lists Setup'**.

2. Expand the **'History'** field and click on **'History Diagnosis'**.

3. Change the filter to select the correct system codes then click on the blue plus button at the bottom of the screen to insert a new record or double click on any record to edit it.

4. The History Diagnosis form will open. Enter the diagnosis details into the appropriate fields.

Number:	This will autogenerate, leave blank.
Key:	Abbreviation of description
Description:	A brief description of the problem.
Better Known As:	An alternative description of the problem.
Anm Types:	Select what Patient types this problem can be used on.
Status:	Should be marked as 'Active' if this diagnosis is to be used.

5. Click on **'Accept'** to save the new details.