PATIENT MANAGEMENT

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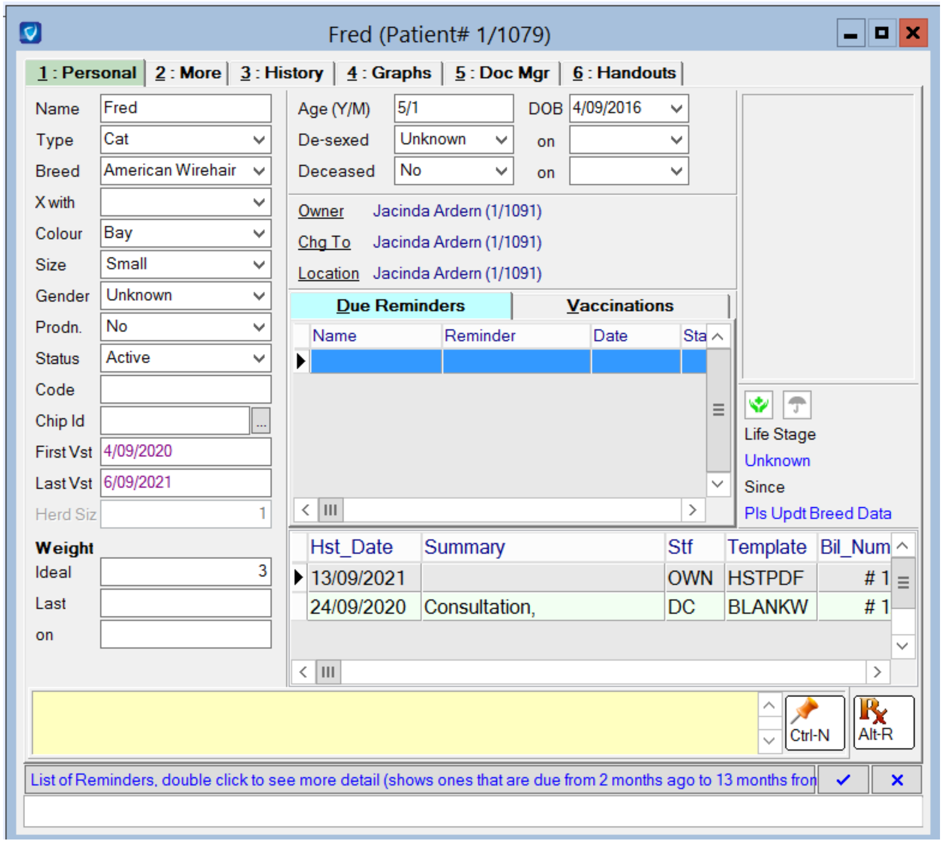
OVERVIEW

The Patient module is used for entering and editing all information about Patients.

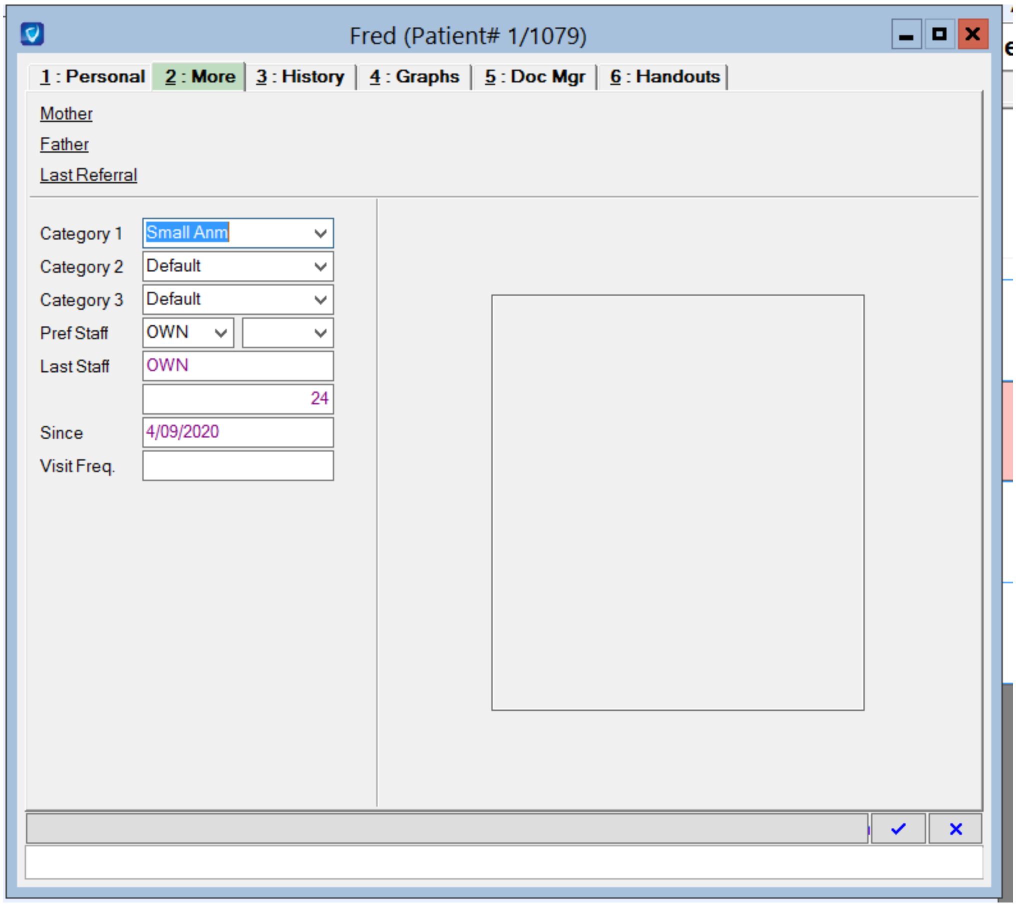
Personal Tab



Name	The name of the Patient.
Type	The Patient type, e.g. Dog, Cat, Cattle Beef etc..
Breed	The Patients breed.
X with	The breed the Patient is crossed with, if any.
Colour	The colour of the Patient.
Size	The size of the Patient, e.g. Large, medium, small.
Gender	The Patients gender, e.g. male or female
Prodn.	This refers to whether the Patient is a production Patient, i.e. produces food for human consumption. This needs to be set to **'Yes'** for PAR tracking to be enabled for this Patient.
Status	Should be set to **'Active'** as long as the Patient still actively deals with the business. Once this is set to **'Inactive'** you will no longer be able to put through any transactions for this Patient. You would normally set to **'Inactive'** in cases where the Patient is deceased or has moved away with their family.
Code	The code that you can assign for the Patient.

Chip ID	The unique identifier of the embedded chip.
First Vst	This refers to the date of first visit of the Patient.
Last Vst	This refers to the last time they came to see the clinic.
Herd Size	If a single Patient record is used to store information for a group of Patients, you can enter the size of the group here. For example, the size of a herd of cattle or a flock of sheep.
Idl Wt	This refers to the ideal weight assigned by the Doctor for this Patient based on breed and conditions.
Last	This refers to the Patient's last recorded weight.
On	This refers to the date of the Patients last recorded weight.
Age (Y/M)	This refers to the age of the Patient in years and months. The date of birth is actually stored and the age is calculated so it is always correct at the time of viewing.
DOB	This refers to the date that the Patient was born. If this is unknown an approximate should be entered. If a date of birth isn't known, but an approximate age is, you can enter the age in the next field, and VetlinkPRO will approximate a date of birth.
Desexed	This refers to the date the Patient was spayed/neutered on. If a de-sexing service is sold within VetlinkPRO then this date is set automatically.
Deceased	This refers to whether the Patient is deceased or not. If 'Yes' is selected, the Patient is automatically marked as inactive.
Owner	This refers to the name and client number of the owner.
Charge To	This refers to the name and client number for the "Charge To" client. This should be set only if the bill should go to a different client than the owner. Single click on "Charge To" to change the client.
Location	This refers to the name and address of the client where the Patient is currently located. Single click on "Location" to change. E.g. John Smith might own a horse, but the horse may reside at CFL stud. A client record for CFL stud will have to be setup in the system.
Due Reminders	This panel shows reminders that are due or overdue. Your selections in setup determine how far into the future reminders will show along with the colour of the reminder.
Vaccinations	This panel lists all the vaccinations that have been performed on this Patient.
History Summary	All previous clinical histories for this Patient will be shown in this panel.
Life Stage	
Since	

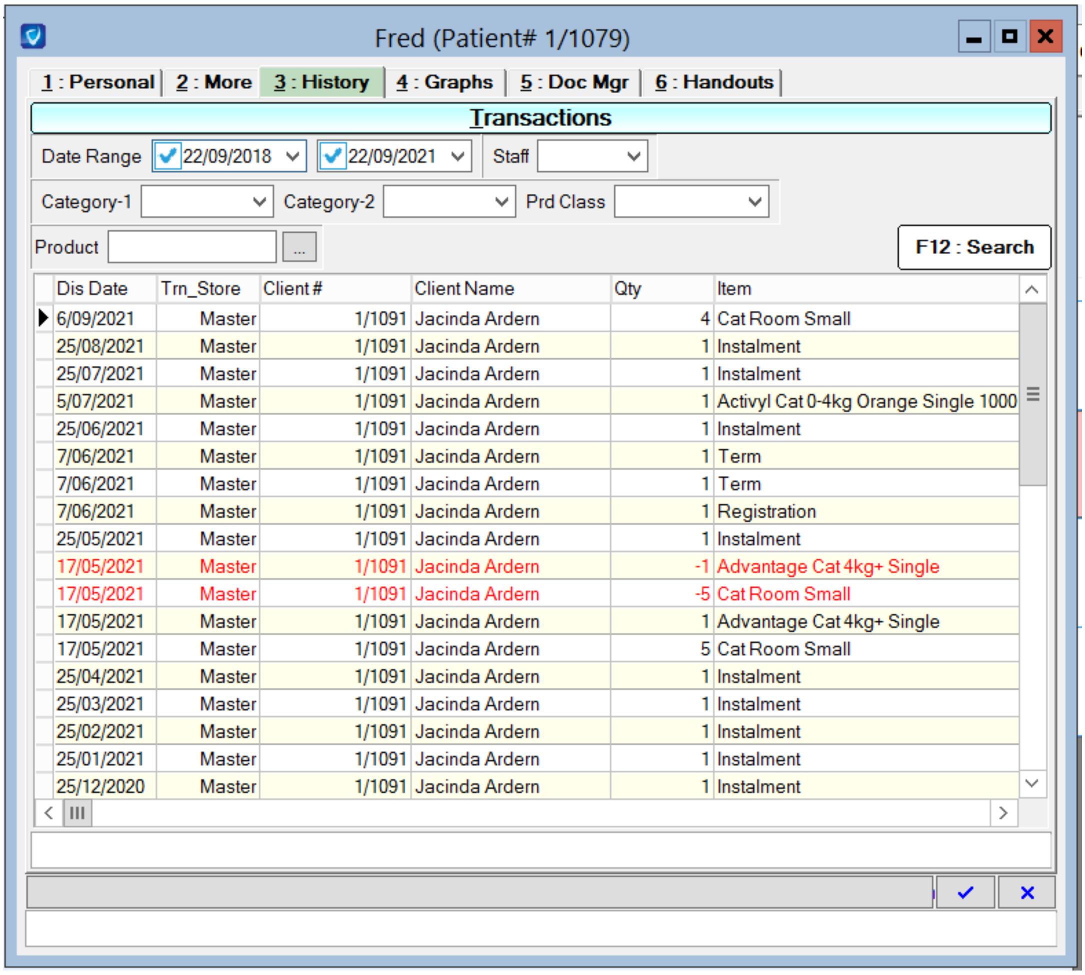
More Tab



Mother	The Patient's mother.
Father	The Patient's father
Last Referral	
Category 1/2/3	This refers to the category for grouping Patients for reporting purposes.
Pref Staff	This refers to the staff member that the owner would prefer the Patient to see, as well as the second most preferred operator, if the preferred staff member is not available.
Last Staff	
# Visits	This refers to the number of visits since the "**Since**" date described below.
Since	This refers to the date of the first visit.
Visit Freq	The frequency of visits since the date referred to in the 'Since' field.

History

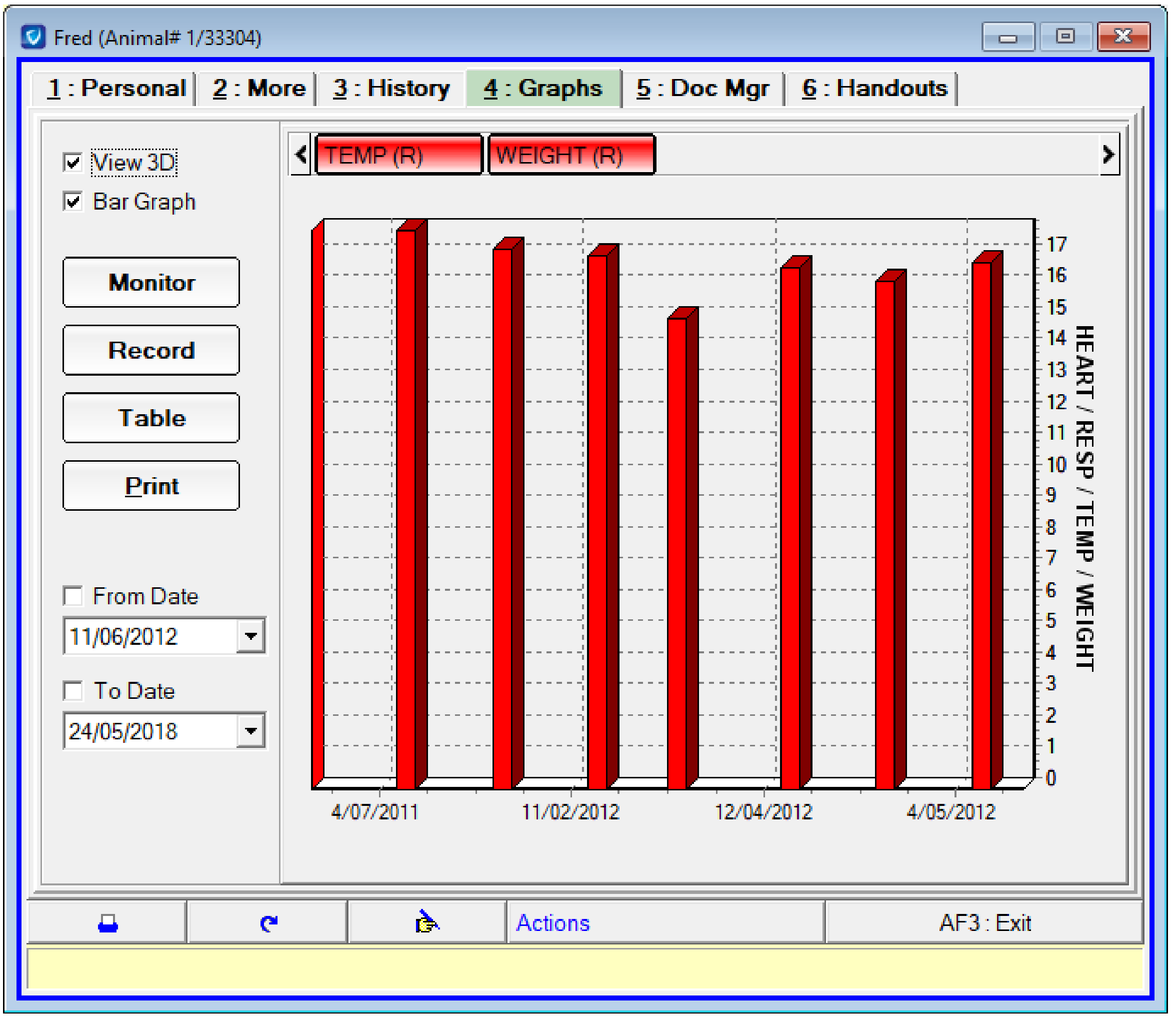
The History tab allows you to search for specific transactions using the filters provided. You are able to search for transactions in a certain date range, by a particular staff member, or for transactions that contain a certain product, category of products or class of products.



Dis Date	Trn_Store	Client #	Client Name	Qty	Item
6/09/2021	Master	1/1091	Jacinda Ardern	4	Cat Room Small
25/08/2021	Master	1/1091	Jacinda Ardern	1	Instalment
25/07/2021	Master	1/1091	Jacinda Ardern	1	Instalment
5/07/2021	Master	1/1091	Jacinda Ardern	1	Activyl Cat 0-4kg Orange Single 1000
25/06/2021	Master	1/1091	Jacinda Ardern	1	Instalment
7/06/2021	Master	1/1091	Jacinda Ardern	1	Term
7/06/2021	Master	1/1091	Jacinda Ardern	1	Term
7/06/2021	Master	1/1091	Jacinda Ardern	1	Registration
25/05/2021	Master	1/1091	Jacinda Ardern	1	Instalment
17/05/2021	Master	1/1091	Jacinda Ardern	-1	Advantage Cat 4kg+ Single
17/05/2021	Master	1/1091	Jacinda Ardern	-5	Cat Room Small
17/05/2021	Master	1/1091	Jacinda Ardern	1	Advantage Cat 4kg+ Single
17/05/2021	Master	1/1091	Jacinda Ardern	5	Cat Room Small
25/04/2021	Master	1/1091	Jacinda Ardern	1	Instalment
25/03/2021	Master	1/1091	Jacinda Ardern	1	Instalment
25/02/2021	Master	1/1091	Jacinda Ardern	1	Instalment
25/01/2021	Master	1/1091	Jacinda Ardern	1	Instalment
25/12/2020	Master	1/1091	Jacinda Ardern	1	Instalment

Graphs

This tab shows you progress of the Patient's weight, temperature, respiratory rate etc., over a period of time. This comes from admitting the Patient in the diary, where it asks you for the weight. The information is shown here, as a graph. You can have many different types of graphs.

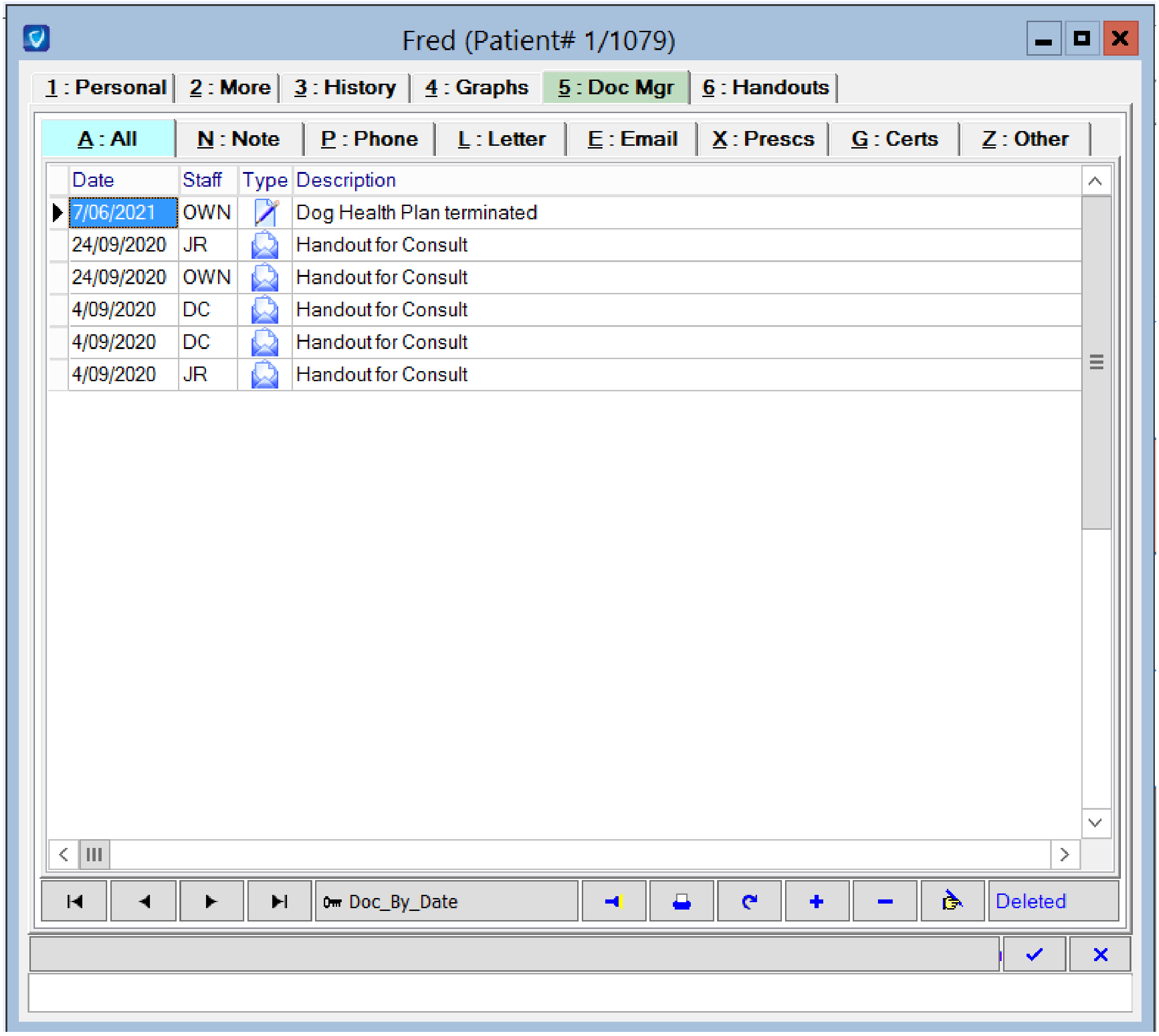


Doc Mgr

The document manager is for recording any sort of communication that you have that relates specifically to this Patient. This is broken down in to six sections:

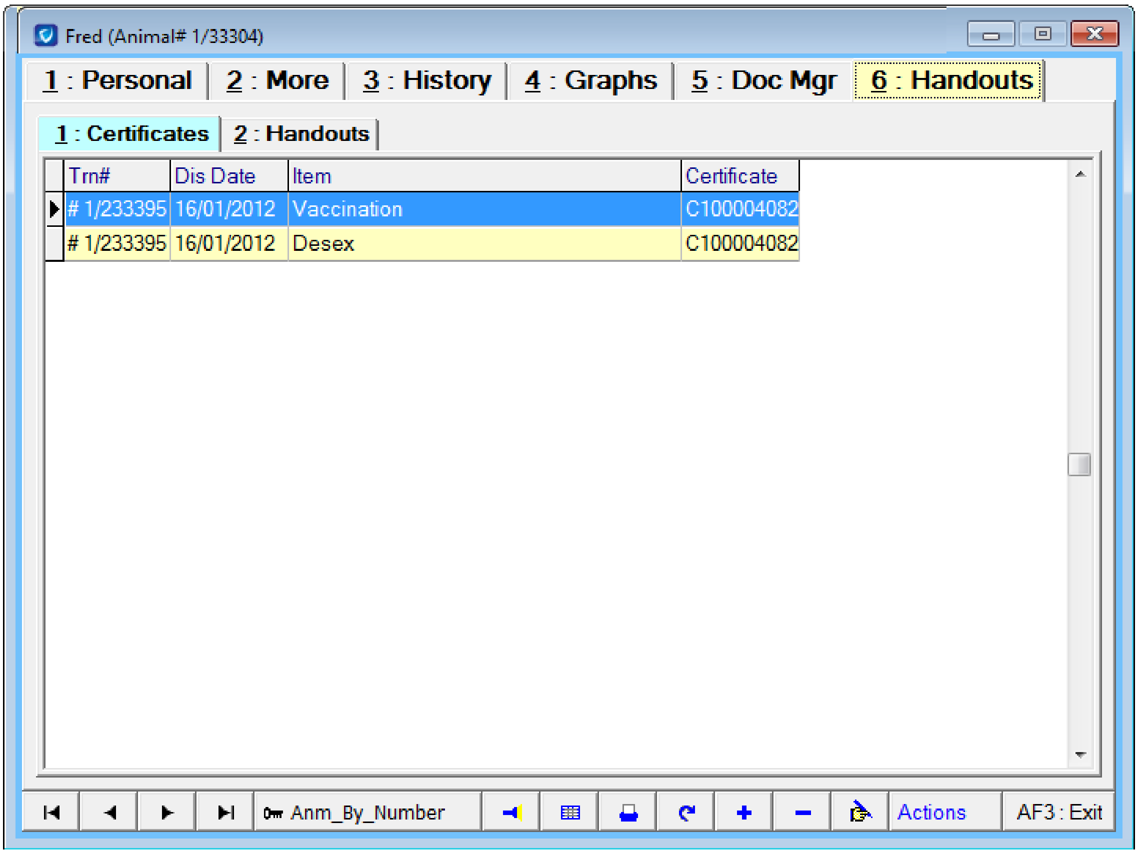
- A: All
- N: Note
- P: Phone
- L: Letter
- E: Email
- X: Prescs
- Z: Other

By clicking on each tab, you are given a filtered list of all entries made under each type of communication. For example: Clicking on 'All' may display two entries, one phone entry and one note. Clicking on the 'Note' tab will display just the note entry, clicking on the phone tab will display just the phone entry, and clicking 'Letter', 'Email', 'Prescriptions' or 'Other' would display no entries.



Handouts

The Handouts tab is used to store all the Certificates and Handouts that have been generated from a bill. To re-print a certificate or handout double click on the certificate to preview it and then click on the print button.



Actions Menu

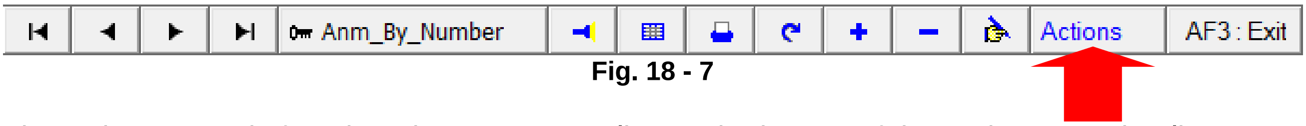


Fig. 18 - 7

The actions menu is found on the common toolbar at the bottom of the Patient record. It lists some unique functions that are available only to the Patient record. The handiest functions are listed below. To access these functions single click on the actions button and a menu will open.

Reminder

The Reminder function opens the Patient reminder window. This window is used for viewing all the Patient reminders that have been done whether they are overdue, due, cancelled or done.

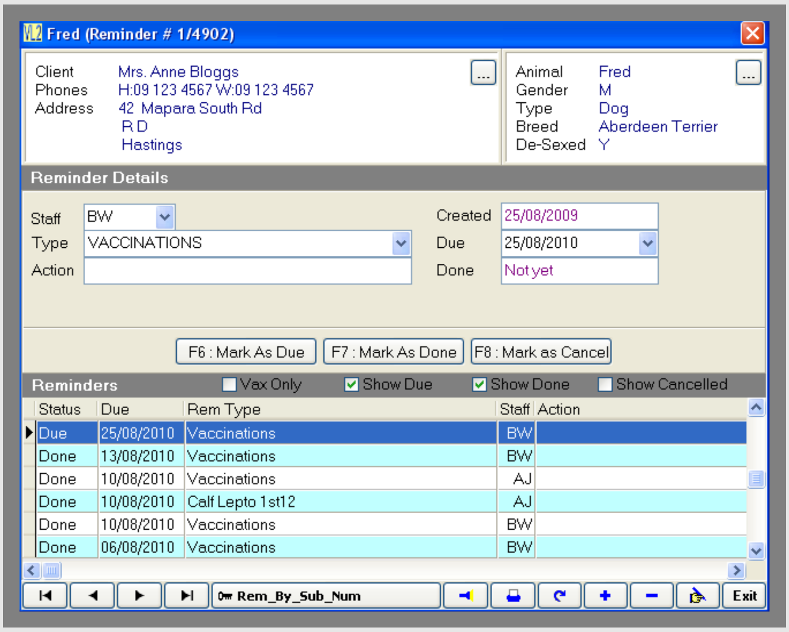


Fig. 18 - 8

History

The history function will open the history browser. This history browser is used for quickly viewing previous clinical histories that have been done.

The history browser is divided into four sections.

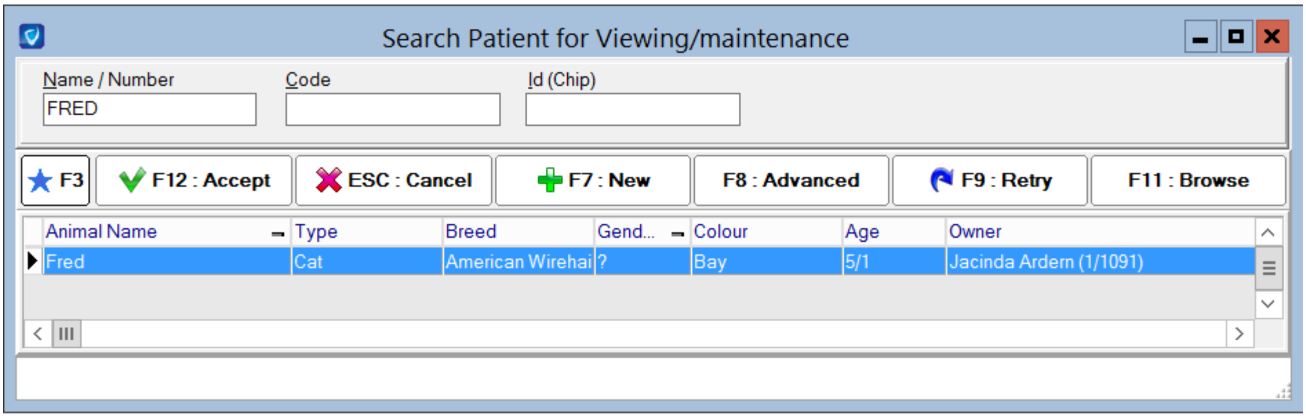
- The bottom section will list each clinical history page that has been created for the Patient.
- The top left section will display the details of the clinical history that the user has selected from the list in the bottom section.
- The top right section will display the bill that the history has been attached to.
- The middle right section will display any drug labels that were on the bill.

SEARCH FUNCTION

The Patient search function is used in many areas of the program, for example when making appointments, making bills or simply looking up Patient details. Regardless of what you are doing, when searching for an Patient the same search options and dialogue boxes are used.

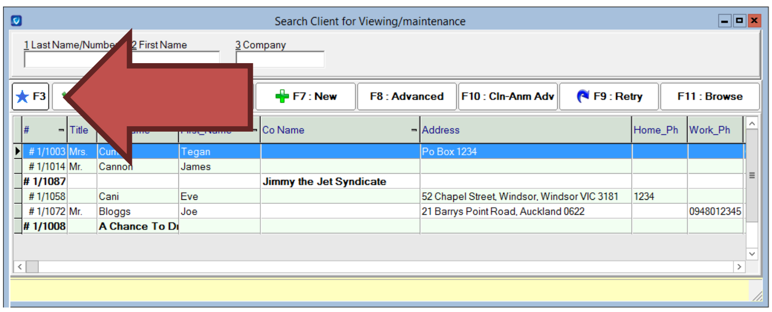
How to Perform a Basic Patient Search

1. Click on the **'Patient'** button.
2. This will display the **'Patient Search Window'**.
3. Enter the first few letters of the Patient name you are searching for.
4. Click **'F12: Search'** to begin the search.
5. The search results are now displayed. To navigate through the list use the keyboard cursor keys (the up and down arrows) or use the scroll bar at the right hand side of the window.
6. To make a selection double-click on a line in the results window, or, using the keyboard, press the **'F12'** key on the line you wish to select.



Most Recently Used List

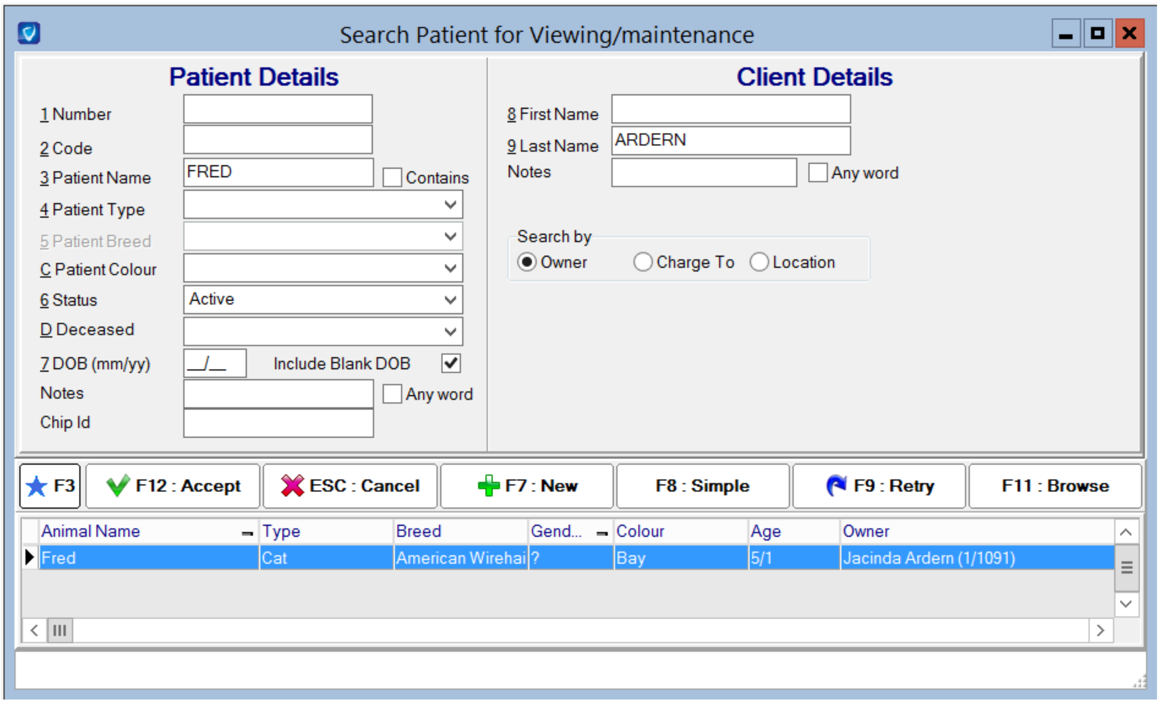
The F3 star button will show the most recently searched list. For example if you are looking at a Patient record and accidently close it, then can't remember who you were looking at, just click the star icon to find the most recently used records.



Using Advanced Search Options

If you cannot find the Patient you need, or if there are too many results to search through, you can narrow your search by using the advanced search function.

1. Click on the **'Patient'** button.
2. This will display the **'Patient Search Window'**.
3. Click on the **'F8: Advanced'** button.
4. The **'Advanced Search Form'** will now open.
5. This form provides more options for you to search by, such as Patient number, microchip id and status etc.
6. Enter your search criteria and click **'F12: Search'**.
7. Select the Patient and choose **'F12: Accept'** to open the client record.

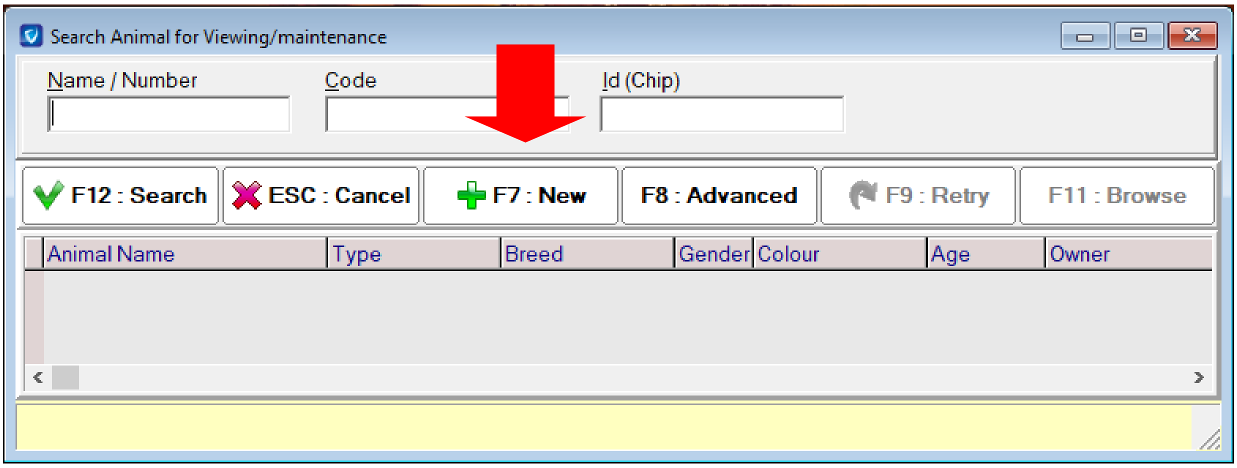


TIP: You may set up your preferred method of search under **Options | Setup | Patient | 1: Options tab | Search Dialog |** then select **'Simple'** or **'Advanced'** from the drop down list.

TIP: The advanced search screen has the **'Contains'** field for **'Patient Name'**. This field provides a word within a word search. For example, when **'Contains'** is checked and you search for **'Boots'** in the Patient name field, VetlinkPRO will find **'Boots'** and **'Pussinboots'**. If the **'Contains'** filed was left unchecked it would only find **'Boots'**.

HOW TO ENTER A NEW PATIENT

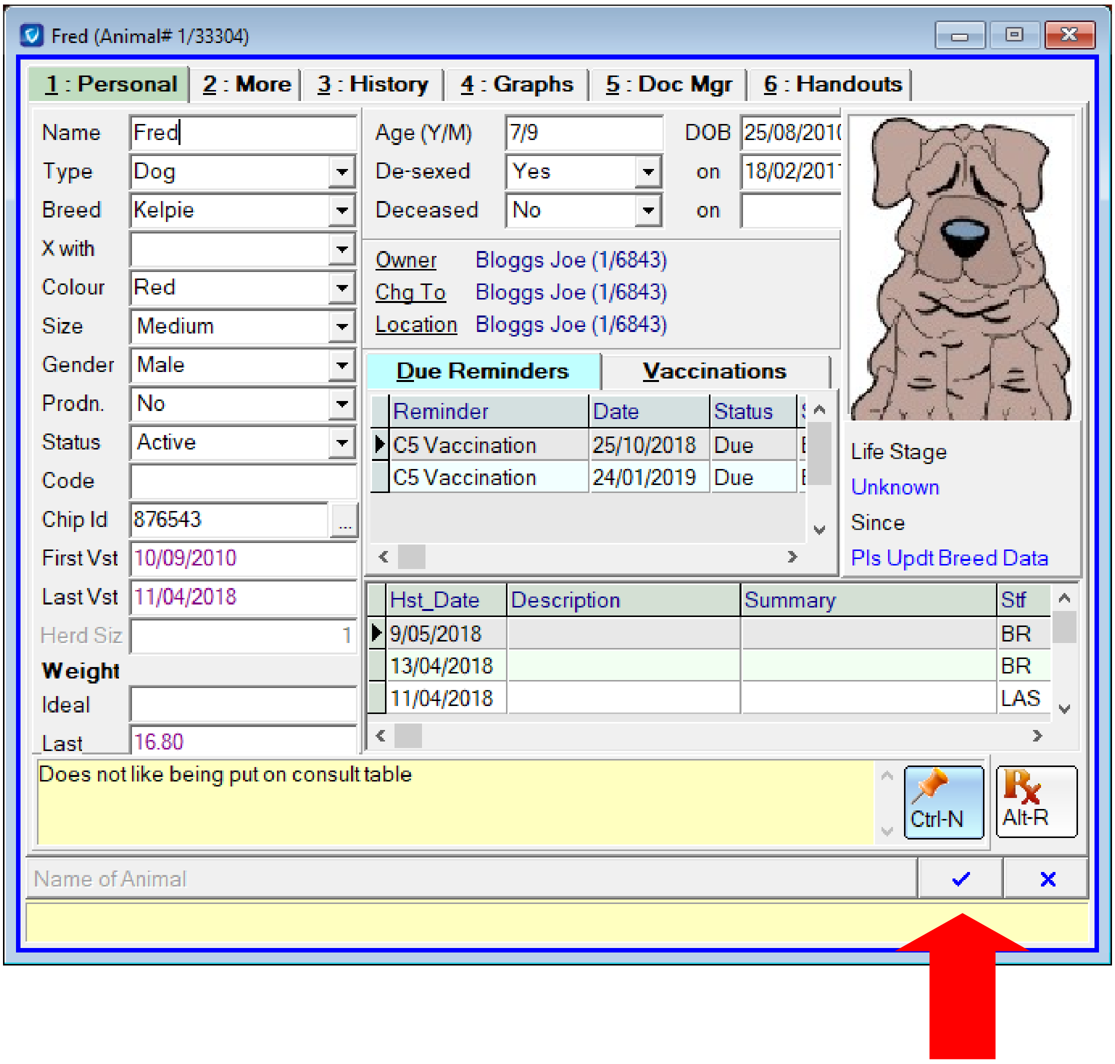
1. Click on the **'Patient'** button.
2. The **'Patient Search'** window will open.



3. Click on the **'F7: New'** button to enter a new Patient.
4. An client search window will open. Select an existing client or create a new one to add the Patient to.
5. A **'New Patient Record'** will open.
6. Enter the new Patient details onto the form.
7. Click on the tick button to save.

HOW TO CHANGE PATIENT DETAILS

1. Click on the **'Patient'** button.
2. Search for the Patient whose details you wish to edit.
3. Open the Patient record.
4. Edit the details you wish to change or add.
5. If you are unable to edit the details click on the **'Edit'** button on the bottom of the Patient window.
6. Once the Patient details have been modified save the changes by clicking on the red tick in the bottom right hand corner.



BREED

The Breed pick list shows all the Patient breeds that are in the system. Each Patient in your database is linked to a breed in this list. If you edit the breed details, all the Patients that are linked to that entry will change as well.

Adding a New Breed

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the **'Patient'** menu and double click on **'Breeds'**.
3. The Breeds pick list will open. Click on the red plus button at the bottom of the form to add a new item.
4. The Patient breeds form will open. Enter in the name of the breed and the type of Patient. Also make sure the status is set to **'Active'**.

Editing an Existing Breed

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the **'Patient'** menu and double click on **'Breeds'**.
3. The Breeds pick list will open. Double click on the breed you wish to edit.
4. The Patient breed window will open. You can now change the name status or Patient type as long as no Patient records are using that breed.

COLOUR

The Colour pick list shows all the Patient colours that are in the system. Each Patient in your database is linked to a colour in this list. If you edit the colour details, all the Patients that are linked to that entry will change as well.

Adding a New Colour

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the **'Patient'** menu and double click on **'Colours'**.
3. The Colours pick list will open. Click on the red plus button at the bottom of the form to add a new item.
4. The colours form will open. Enter in the name of the colour and the make sure the status is set to **'Active'**. You can also select the closest colour from the palette, although these are not used anywhere else in the program.

Editing an Existing Colour

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the **'Patient'** menu and double click on **'Colours'**.
3. The Colours pick list will open. Double click on the colour you wish to edit.
4. The colour window will open. You can now change the name or status of the colour.
5. You will be warned not to edit the details if any Patients are using that colour.

NOTES

The notes system is used to display pop-up or printed notes at various user defined stages in VetlinkPRO. For example, you can automate the system to display a note when a certain Patient is added to a bill. These notes may be prompts to advise staff members of important information they need to know about an Patient. Notes can be added for Patients, clients, products, staff members and suppliers. The process for adding these reminders however is the same throughout the program.

SETTING UP PATIENT CATEGORIES

Categories group clients, products, suppliers or Patients together for reporting purposes. You can then generate a report for a particular category to see their sales figures or profitability. See below for instructions on creating a new category.

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the client, Patient, product or supplier menu depending on what type of category you are setting up.
3. Double-click on category 1 or 2. If you are creating a product category you have an extra three categories to choose from.
4. If you are creating a new category click on the red plus button at the bottom of the form. (If you are editing a category name just click on the name with the mouse and type in the new name.)
5. A blank line will be added at the bottom of the grid. Type in the name of the category and click on the red plus button to save.
6. When creating a new client, Patient, product or supplier record, or when editing an existing record you should now be to assign that record to a category.

SETTING UP PATIENT PROFILES

When a new client, product or Patient is added to your database, a profile is requested. Examples include Adult, Member, etc. The profile acts like a template and is there so that users in your business do not have to make decisions on a number of client configurations when setting up new client, product or Patient records. These settings include what mailing list they will be automatically subscribed to, the report category that they will be assigned to, the discount levels that they will be given or the batch group they will go to for statements. You can create new client profiles with pre-set criteria and train your staff to select the correct ones when adding new clients. This 'standardisation' within your organisation will benefit the clinic as data entry will be faster and more accurate as a number of options will not have to be selected each time a new record is added to the database.

1. Click on the **'Options'** menu and select **'Picklists Setup'**.
2. Expand the client, Patient, product or menu depending on what type of profile you are setting up.
3. Double-click on profile. And the client profile form will open.
4. To edit an existing profile double-click on the profile name. To create a new profile click on the red plus button at the bottom of the screen.
5. The client, Patient or product profile form will open. Select the options you wish to use in the profile. Depending on the profile selected a number of different options will be available.
6. Once you have set the fields for the profile click on the **'Accept'** button to save and exit.

PATIENT INSURANCE DETAILS

Patient Insurance details can be added from the patient record. To add the details;

1. Open the patient record
2. Click the Insurance icon on the right-hand side of the record or go to **Actions -> Insurance -> Register.**
3. Select the insurance provider from the list or type in a new provider name if it doesn't exist already.
4. Enter the **policy number**
5. Enter other details as required.
6. **Accept** the details to save to the patient.
7. The **Umbrella icon** will turn **green** to indicate the animal is insured.
8. On the billing/history form the green umbrella will show to indicate the patient has insurance.