

# PATIENT MANAGEMENT

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# OVERVIEW

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

## Personal Tab

Falcon (Patient# 1/56013)

1 : Personal 2 : More 3 : History 4 : Graphs 5 : Doc Mgr 6 : Handouts 7 : Insurance

Name: Falcon Age (Y/M): 13/1 DOB: 29/06/2010

Type: Dog De-sexed: No on

Breed: Siberian Husky Deceased: No on

X with:

Colour:

Size:

Gender: Male

Prodn.: No

Status: Active

Code:

Chip Id:

First Vst: 29/12/2010

Last Vst: 12/06/2023

Herd Siz: 1

Weight Ideal:

Last: 10.00

Owner: B Ruth (2/45112)

Chg To: B Ruth (2/45112)

Location: B Ruth (2/45112)

Due Reminders

Name	Reminder	Date	Staff	Ac
There are no reminders due				

Vaccinations



Date	Summary	Staff	Template	Bill	Lab Vet	Type
30/06/2021		SY	ZGRIDA	1/813949		RCT
29/12/2010	Consultation	SB	ALTNORMD	1/551309		RCT

Life Stage: Unknown

Since: Pls Updt Breed Data

Menu AF3 : Exit

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

<b>First Vst</b>	This refers to the date of first visit of the Patient.
<b>Last Vst</b>	This refers to the last time they came to see the clinic.
<b>Herd Size</b>	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.
<b>Ideal</b>	This refers to the ideal weight assigned by the Doctor for this Patient based on breed and conditions.
<b>Last</b>	This refers to the Patient's last recorded weight.
<b>On</b>	This refers to the date of the Patients last recorded weight.
<b>Age (Y/M)</b>	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.
<b>DOB</b>	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.
<b>Desexed</b>	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.
<b>Deceased</b>	This refers to whether the Patient is deceased or not. If 'Yes' is selected, the Patient is automatically marked as inactive.
<b>Owner</b>	This refers to the name and client number of the owner.
<b>Charge To</b>	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.
<b>Location</b>	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.
<b>Due Reminders</b>	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.
<b>Vaccinations</b>	This panel lists all the vaccinations that have been performed on this Patient.
<b>History Summary</b>	All previous clinical histories for this Patient will be shown in this panel.
	Shows if the patient has a health plan. Icon changes colour based on status of plan.
	Shows if the patient has insurance. Icon changes colour based on status of plan. This is an optional module, please contact <a href="mailto:sales@vetlinkpro.com">sales@vetlinkpro.com</a> if you would like this module.
<b>Life Stage</b>	
<b>Since</b>	

## More Tab

Falcon (Patient# 1/56013)

1 : Personal   2 : More   3 : History   4 : Graphs   5 : Doc Mgr   6 : Handouts   7 : Insurance

Mother  
Father  
Last Referral

Category 1: Default  
Category 2: Default  
Category 3: Default  
Pref Staff: MRH  
Last Staff: MRH  
Since: 29/12/2010  
Visit Freq: 6

AF3 : Exit

<b>Mother</b>	The Patient's mother.
<b>Father</b>	The Patient's father
<b>Last Referral</b>	N/A
<b>Category 1/2/3</b>	This refers to the category for grouping Patients for reporting purposes.
<b>Pref Staff</b>	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.
<b>Last Staff</b>	This is the staff member that saw the patient last.
<b># Visits</b>	This refers to the number of visits since the 'Since' date described below.
<b>Since</b>	This refers to the date of the first visit.
<b>Visit Freq</b>	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.

Falcon (Patient# 1/56013)

1 : Personal   2 : More   3 : History   4 : Graphs   5 : Doc Mgr   6 : Handouts   7 : Insurance

Date From: 5/07/2020   Date To: 5/07/2023   Staff:

Category-1:    Category-2:    Prd Class:

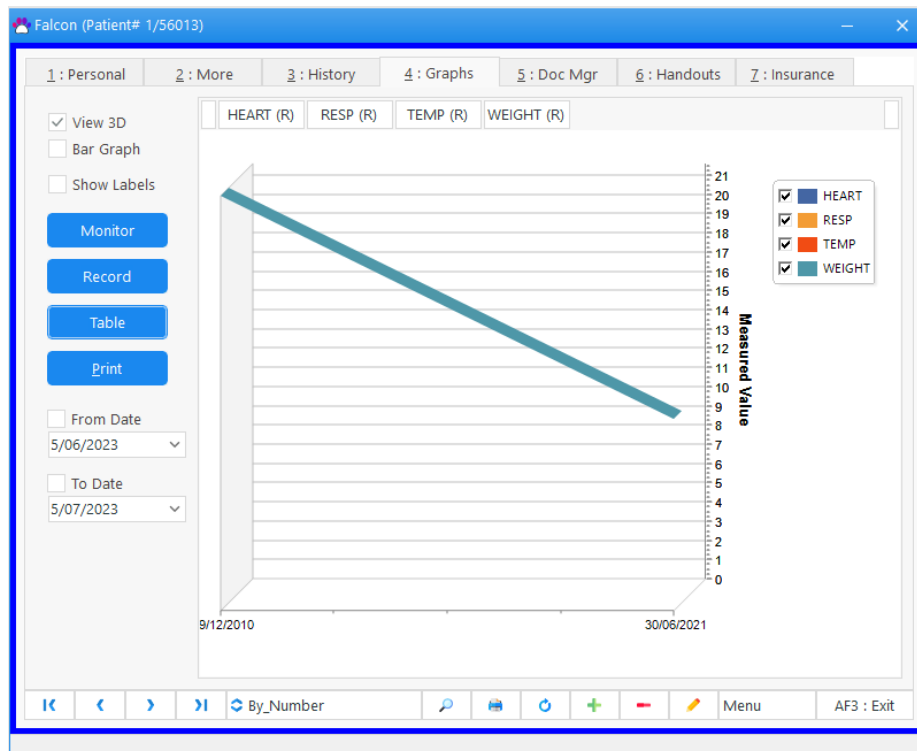
Product:   

* Date	Store	Client	Qty	Item	Sell (Excl)	GST	Sell (Incl)	Staff	Category-1
> 12/06/2023	Takapuna	B Ruth	1	Instalment	\$36.17	5.43	\$41.60	MRH	Default
12/06/2023	Takapuna	B Ruth	1	Term	\$499.20	0	\$499.20	MRH	HPTermPrd
12/06/2023	Takapuna	B Ruth	1	Registration	\$8.70	1.3	\$10.00	MRH	Default
8/06/2023	Takapuna	B Ruth	1	Drontal Plus	\$1.82	0.27	\$2.09	MM	C/AWORME
8/06/2023	Takapuna	B Ruth	1	Endogard Dogs 20kg	\$3.55	0.53	\$4.08	MF	C/AWORME
8/06/2023	Takapuna	B Ruth	1	Eukanuba Cat Multi-Stage Renal	\$33.56	5.03	\$38.59	MS	C/AFOOD
8/06/2023	Takapuna	B Ruth	1	Eukanuba Cat Chicken/Rice	\$81.00	12.15	\$93.15	ME	TEST
8/07/2021	Takapuna	B Ruth	1	Consult Dog	\$78.26	11.74	\$90.00	MF	TEST
30/06/2021	Takapuna	B Ruth	1	Consult Dog	\$78.26	11.74	\$90.00	SY	TEST

By\_Number                     AF3 : Exit

## 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.

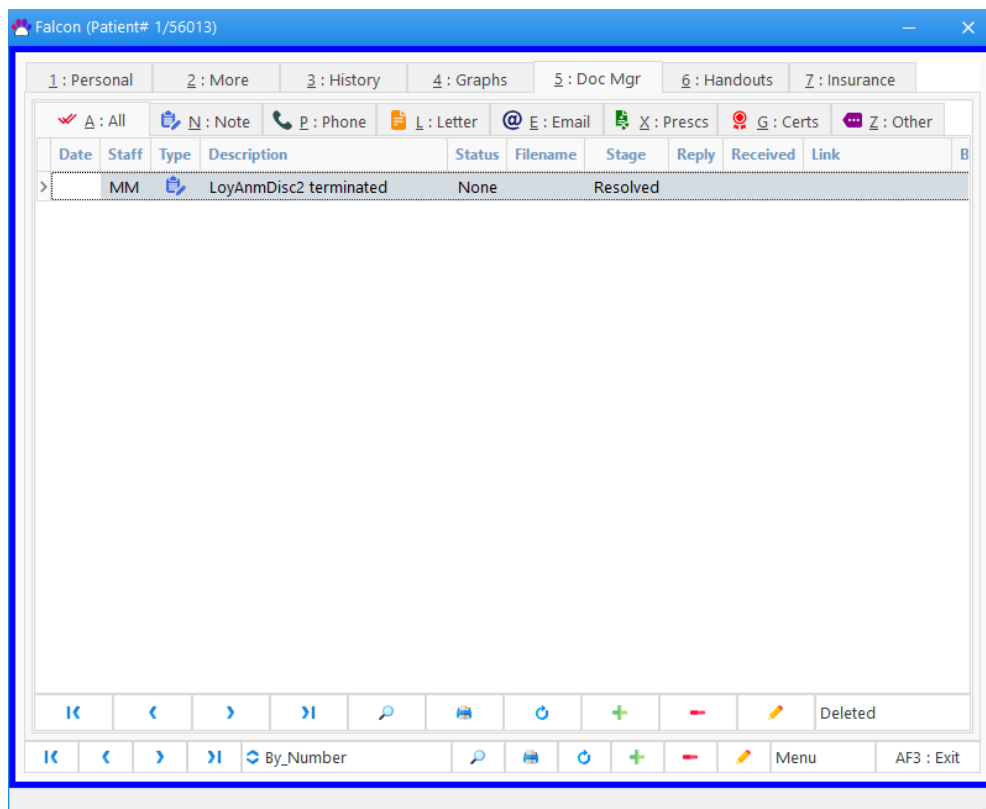


## Doc Mgr

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 eight sections:

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

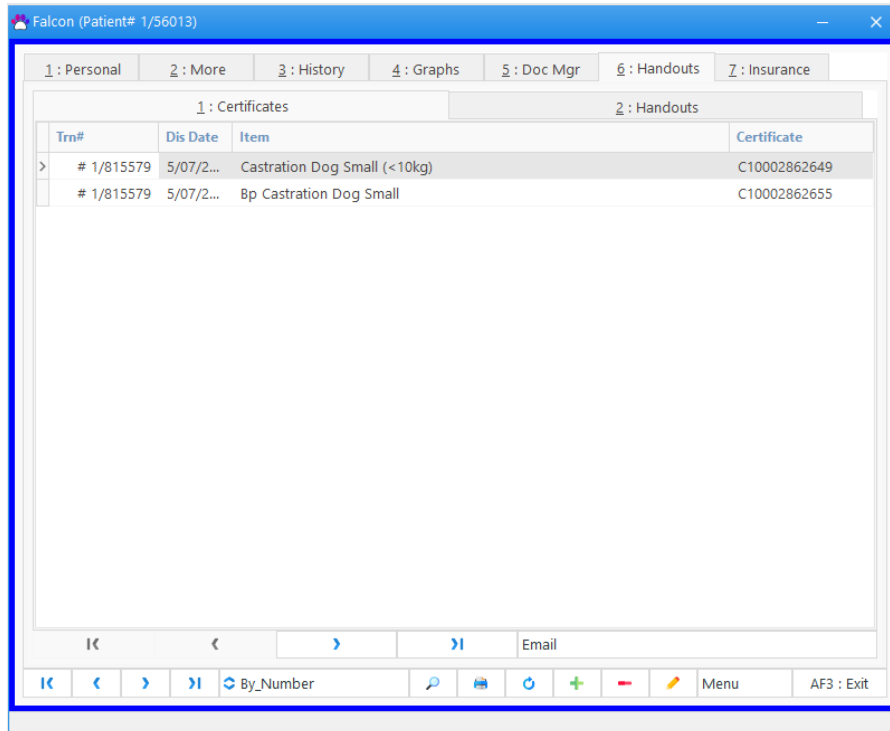
By clicking on each tab, you are given a filtered list of all entries made under each type of communication. For example: Clicking on 'All' may display two entries, one phone entry and one note. Clicking on the 'Note' tab will display just the note entry, clicking on the phone tab will display just the 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.



## Insurance

The Insurance tab is used to store all the Insurance Claims that have been submitted for the patient. You can check and manually update the status of any claim using the 'Poll Status' and 'Update Status' buttons. Making GAP payments against claims can be done by selecting the relevant claim and clicking the 'Make Payment' button. For GapOnly and PetSure insurance integration, please contact [hello@gaponly.com.au](mailto:hello@gaponly.com.au) and see the insurance chapter of the VetlinkPRO manual.

Falcon (Patient# 1/56013)

1 : Personal 2 : More 3 : History 4 : Graphs 5 : Doc Mgr 6 : Handouts 7 : Insurance

**Policy Details**

Provider: Southern Cross Pet In Number: 0123456 Status: Active Validate

* Number	Date	Branch	Provider	Type	Status	Approved	Claimed
No data to display							

Navigation: Poll Status Update Status Make Payment

Search: By\_Number Menu AF3 : Exit

## Actions Menu

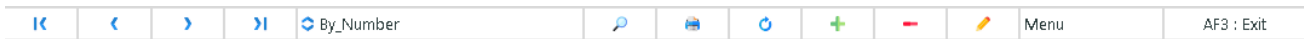


Fig. 18 - 7

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.

### Reminders

The Reminders 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.

 A screenshot of the 'Reminder' window for a patient named Chino (fluffy). The window displays patient details, reminder details, and a list of reminders.
 

**Reminder Details**

Staff	SG	Created	30/08/2012
Type	VACCINATIONS	Due	30/08/2013
Action		Done	Not yet

Reminder's Sent: 0

Buttons: Mark As Due, Mark As Done, Mark As Cancel

**Show Only**

* Reminder	Due	Staff	Status	Action	Branch
> Vaccinations	30/08/2013	SG	Due		ECB Test Clinic
Vaccinations	22/08/2013		Due		ECB Test Clinic
Bravecto due 3 months	8/12/2020	TW	Due		ECB Test Clinic
Recalls	23/06/2022	AAH		test	ECB Test Clinic

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.

# 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.

# 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 information about the patient you are searching for such as name or ID number.
4. Click **'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'** or **'Enter'** key on the line you wish to select.

Patient Search - for Viewing/maintenance

Search Text  
fluffy

F3 Accept Cancel New Advanced Retry Browse

* Num	Name	Type	Breed	Gender	Colour	Age	Owner	Address	Stat
> # 1/39707	Chino (fluffy)	Cat	Domestic Mediu...	F	Grey & Apr...	0/7	Debbie Ward (1/2051...	8 Awanohi Road, Torbay, ...	Acti
# 1/18657	Fluffy	Cat	Dom. Short Hair	M	Black & Wh...	26/9	Paddy Baker (1/10925)	248 Mayfair Crescent, Glen...	Acti
# 1/52508	Fluffy	Cat	Chinchilla	F	Grey & Whi...	3/0	Angela Bellamy (1/26...	9a Ballymore Drive, Albany...	Acti
# 1/37601	Fluffy	Dog	Bichon Frise	F	White	20/0	Taerim Bland (1/20806)	13 Zion Road, Whangapar...	Acti
# 1/57070	Fluffy	Rabbit	Lop Ear	M		1/10	Aniko Camille (1/2877...	8 Riviera Place	Acti
# 1/33594	Fluffy	Dog	Maltese	M	White	9/5	Jasmine Carpenter (1...	11 Killarney Place, Sunnyno...	Acti
# 1/37305	Fluffy	Guinea Pig		F	Ginger & ...	12/9	Faith College Of Scien...	13 Sample Road, Torbay H...	Acti
# 1/27481	Fluffy	Guinea Pig	Other	?			Jane & Richard Colley...	21 Rugby Road, Torbay, N...	Acti
# 1/36534	Fluffy	Cat	Domestic Mediu...	M	Black & Wh...	14/10	Maura Day (1/20265)	9a Argent Lane, Torbay, N...	Acti
# 1/32694	Fluffy	Cat	Domestic Long ...	F	Tortishell	18/7	Aaron Deacon (1/181...	11 B Glenalmond Road, Br...	Acti
# 1/58718	Fluffy	Rabbit	Angora	F	White	0/11	Zoe Duncan (1/29543)	26 Ellangowan Road, Brow...	Acti
# 1/19093	Fluffy	Cat	Domestic Long ...	F	Tabby	31/4	Darran Ellis (1/11155)	10A Scott Road, Torbay, N...	Acti
# 1/40428	Fluffy	Cat	Domestic Long ...	F	Tortishell	12/7	Pamela Elmes (1/221...	1048 Stanford Street, Torb...	Acti
# 1/31615	Fluffy	Cat	Persian	M	Grey	24/4	Hayley Feltham (1/16...	20 Kauri Road, Rothesay B...	Acti

## Most Recently Used List

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

Patient Search - for Viewing/maintenance

Search Text  
fluffy

F3 Accept Cancel New Advanced Retry Browse

* Num	Name	Type	Breed	Gender	Colour	Age	Owner	Address	Stat
> # 1/39707	Chino (fluffy)	Cat	Domestic Mediu...	F	Grey & Apr...	0/7	Debbie Ward (1/2051...	8 Awanohi Road, Torbay, ...	Acti
# 1/18657	Fluffy	Cat	Dom. Short Hair	M	Black & Wh...	26/9	Paddy Baker (1/10925)	248 Mayfair Crescent, Glen...	Acti
# 1/52508	Fluffy	Cat	Chinchilla	F	Grey & Whi...	3/0	Angela Bellamy (1/26...	9a Ballymore Drive, Albany...	Acti
# 1/37601	Fluffy	Dog	Bichon Frise	F	White	20/0	Taerim Bland (1/20806)	13 Zion Road, Whangapar...	Acti
# 1/57070	Fluffy	Rabbit	Lop Ear	M		1/10	Aniko Camille (1/2877...	8 Riviera Place	Acti

## 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 **'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 **'Search'**.
7. Select the Patient and choose **'Accept'** to open the client record.

* Num	Name	Type	Breed	Gender	Colour	Age	Owner	Address	Stat
# 1/18657	Fluffy	Cat	Dom. Short Hair	M	Black & Wh...	26/9	Paddy Baker (1/10925)	248 Mayfair Crescent, Glen...	Acti

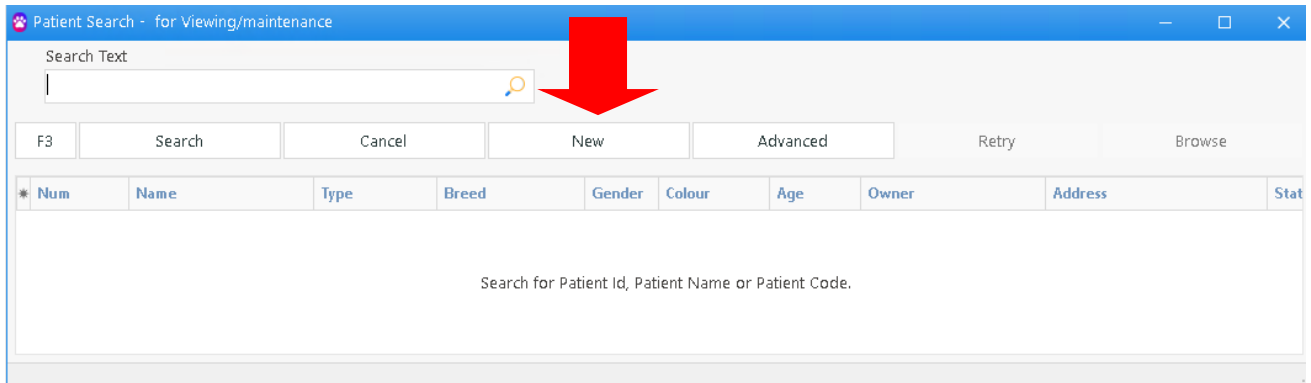


**TIP:** You may set up your preferred method of search under **Options | Setup | Patient | 1: Options tab | Search Dialog |** then select **'Simple'** or **'Advanced'** from the drop down list.

**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'** field 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.



The screenshot shows a software window titled "Patient Search - for Viewing/maintenance". At the top is a "Search Text" input field with a magnifying glass icon. Below this is a row of buttons: "F3", "Search", "Cancel", "New", "Advanced", "Retry", and "Browse". A large red arrow points directly to the "New" button. Below the buttons is a table with columns: "Num", "Name", "Type", "Breed", "Gender", "Colour", "Age", "Owner", "Address", and "Stat". The table is currently empty, and a message "Search for Patient Id, Patient Name or Patient Code." is displayed in the center.


3. Click on the **'New'** button to enter a new Patient.
4. A 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 green tick in the bottom right-hand corner.

Barkers - Tom (Patient# 1/55453)

1 : Personal    2 : More    3 : History    4 : Graphs    5 : Doc Mgr    6 : Handouts



Name: Barkers - Tom    Age (Y/M): 17/0    DOB: 19/11/2005    

Type: Dog    De-sexed: No    on:      
 Breed: Heading Dog    Deceased: No    on:      
 X with:      
 Colour:      
 Size:      
 Gender: Male      
 Prodn.: No      
 Status: Active      
 Code:      
 Chip Id:      
 First Vst: 19/11/2010      
 Last Vst: 6/07/2012      
 Herd Siz: 1

Owner: Brownrigg Agriculture Group Ltd (1/1119)    Life Stage: Unknown    Since:      
 Chg To: Brownrigg Agriculture Group Ltd (1/1119)      
 Location: Brownrigg Agriculture Group Ltd (1/1119)      
 [Pls Updt Breed Data](#)

Due Reminders    Vaccinations

Name	Reminder	Date	Staff	Action	Status	Reminders Sent
* Date	Summary	Staff	Template	Bill	Lab Vet	Type
> 6/07/2012	s/o	JN	ALTNORMD	1/717676		RCT
29/06/2012	Revisit	AP	ALTNORMD	1/715109		INV
26/06/2012	abcess formed rhs	AP	ALTNORMD	1/713883		INV
31/05/2012	Revisit	AP	ALTNORMD	1/706225		INV





## 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 **'Breed'**.
3. The Breeds pick list will open. Click on the green 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 **'Breed'**.
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 a 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, 2 or 3. If you are creating a product category you have an extra two 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 able to assign that record to a category.

## SETTING UP PATIENT PROFILES

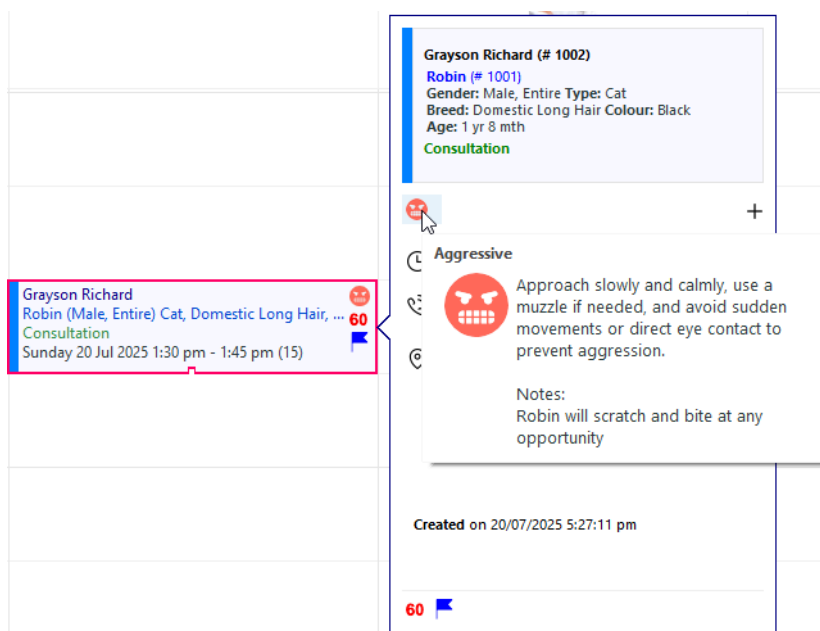
When a new client, product or Patient is added to your database, a profile is requested. Examples include Adult, Member, etc. The profile acts like a template and is there so that users in your business do not have to make decisions on a number of client configurations when setting up new client, product 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 TAGS

## Patient Demeanours

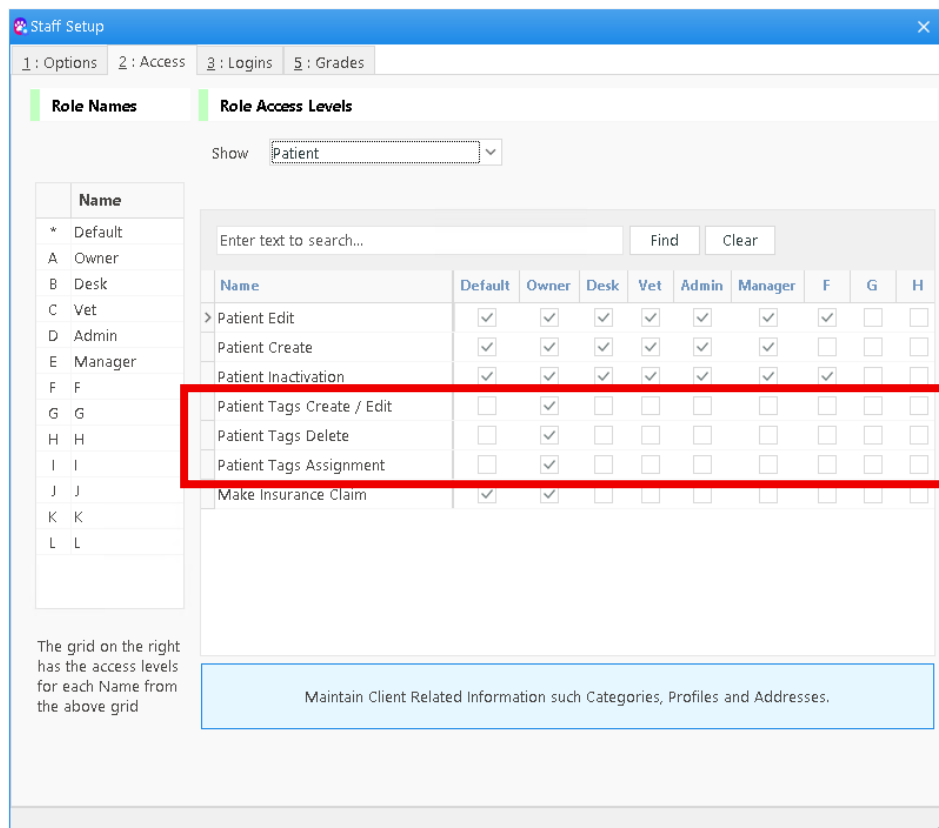
Patient Demeanours are used to add an icon to an animal indicating its Demeanour, eg Aggressive, timid, scratches etc... As well as the icon an additional note can be added to provide more information. Demeanour names, icons and where the icon should appear can all be customized.



## Access Levels

Patient Demeanours and Major Diseases use the same access levels (patient tags) that control who can create / edit tag names in picklist setup, who can add tags to patients records and who can delete tag's from patient records. To configure please follow steps below;

1. Go to **Options -> Setup**
2. **Staff** button
3. **Access** tab
4. Change **Show to Patient**
5. Set Access Level group that can do each of;
  - a. **Patient Tags Create / Edit** (this refers to setup of patient tags in Picklist Setup)
  - b. **Patient Tags Delete** (refers to who can delete tags from patient)
  - c. **Patient Tags Assignment** (who can add Patient Tags to patient)
6. Save and exit Setup
7. Check that Staff are then assigned to correct access level in their staff record in Staff tab.



Staff Setup

1 : Options 2 : Access 3 : Logins 5 : Grades

Role Names Role Access Levels

Show Patient

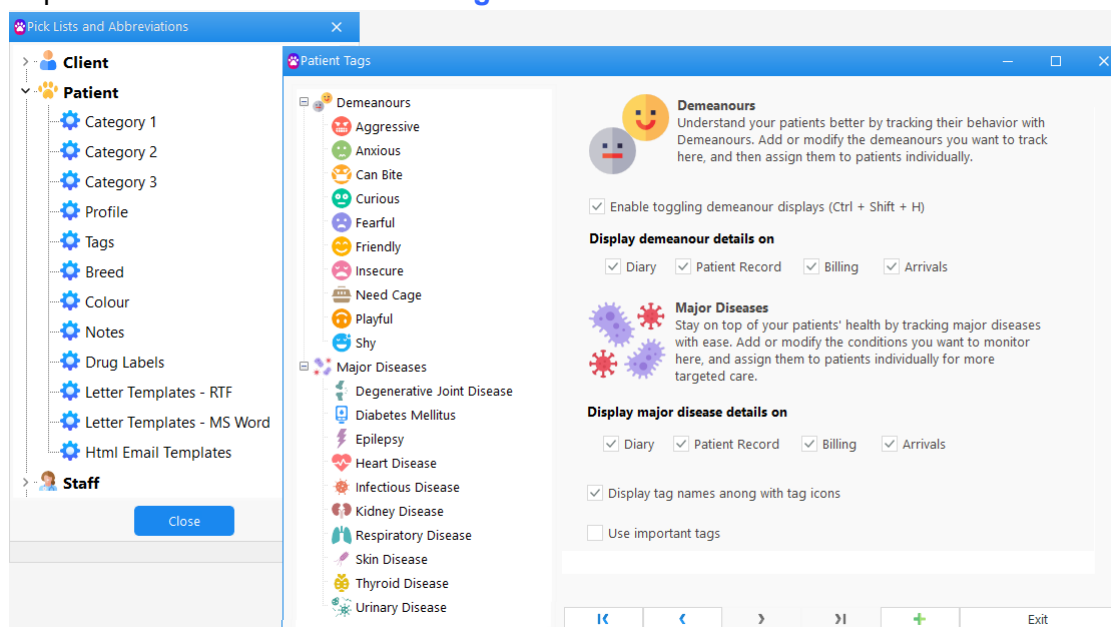
Name	Default	Owner	Desk	Vet	Admin	Manager	F	G	H
* Default									
A Owner									
B Desk									
C Vet									
D Admin									
E Manager									
F F									
G G									
H H									
I I									
J J									
K K									
L L									
> Patient Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Create	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Inactivation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Tags Create / Edit	<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"/>
Patient Tags Delete	<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"/>
Patient Tags Assignment	<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"/>
Make Insurance Claim	<input checked="" 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"/>

The grid on the right has the access levels for each Name from the above grid

Maintain Client Related Information such as Categories, Profiles and Addresses.

## Configuration of Demeanours Display and Actions

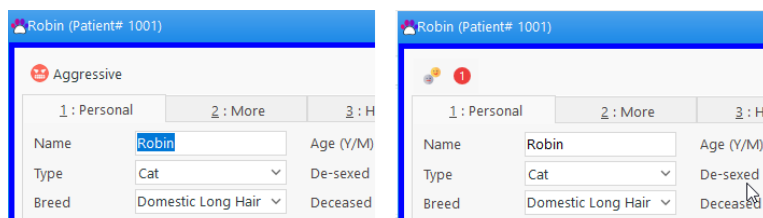
1. Go to **Options -> Picklists Setup**
2. Expand **Patient -> Double click Tags -> Select Demeanours**



3. Configure how Demeanours show in Vetlink

### a. *Enable Toggling of Demeanour Displays*

Enabling this just allows you to hide Demeanour icons with shortcut key combination of (**Ctrl + Shift + H**). This might be used is clients can see your screen and you don't want them to see icon associated

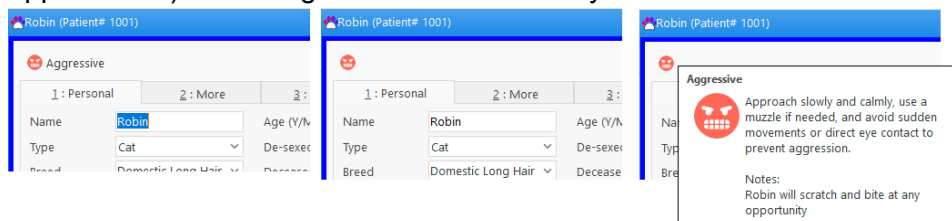


### b. *Display Demeanour Details on;*

Demeanours can display on any of Diary, Patient Record, Billing Arrivals  
Just tick locations to display tags. (See section How demeanours will display for More information.

### c. *Display tag names along with tag icons*

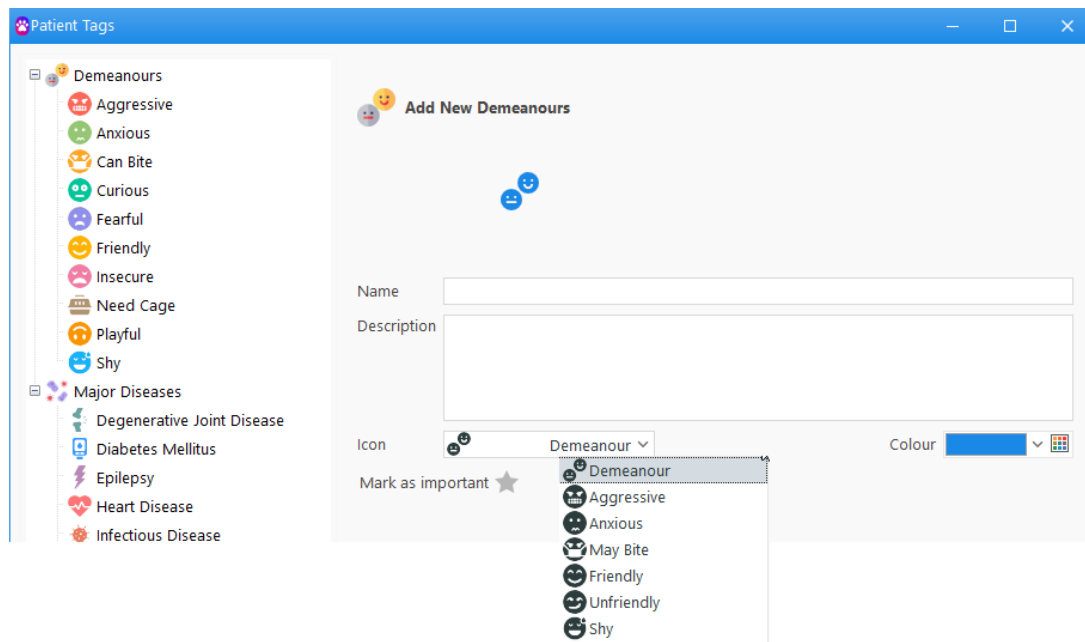
Ticking this option will show the Tag name next to the icon (apart from on appointment). Unticking will hide it. If hidden you can still view the name in the tooltip



### d. Use important tags

## Adding New Demeanour Type

1. Go to **Options -> Picklists Setup**
2. Expand **Patient -> Double click Tags -> Select Demeanours**
3. You may need to Log in with ID and password depending on Access Level setup
4. Click **+** to add new Demeanour
  - a. Add Demeanour name
  - b. Add a default Description
  - c. Select Icon from List
  - d. Choose colour for the icon
5. Click **Tick** to Save



## Editing Existing Demeanour

1. Go to **Options -> Picklists Setup**
2. Expand **Patient -> Double click Tags -> Select Demeanours**
3. You may need to Log in with ID and password depending on Access Level setup
4. Select Demeanour to edit
5. Edits details as required
6. Click **Tick** to Save

## How will Demeanours display

Demeanour will display on the on the records you have selected in Picklists. You can have your mouse over the icon to display the tool tip and see any additional notes

### Appointment

### Billing Screen

## Appointment Booking Screen

## Arrivals Screen

## Patient Record



## Adding, Editing and Deleting Demeanours for Patient

### How to add a Demeanour to Patient

To add a Demeanour;

1. Open Patient Record
2. You may need to log in depending on access level setup
3. Click the **Demeanour icon**
4. Tick Demeanours to add to this patient

Robin (Patient# 1001)

Curious Fearful

1: Personal 2: Tag Note 3: History 4: Graphs 5: Doc Mgr 6: Handouts

Name: Rc Delete Tag Age (Y/M): 1/8 DOB: 26/11/2023

Type: Cat De-sexed: No on

Breed: Domestic Long Hair Deceased: No on

X with: Owner: Richard Grayson (1002)

Colour: Black Chg To: Richard Grayson (1002)

Size: Location: Richard Grayson (1002)

Gender: Male

Prodn.: No

Status: Active

Code:

Chip Id: ...

First Vst: 22/05/2022

Last Vst: 16/07/2025

Herd Siz: 1

Weight: Ideal: Last: 3.00 on: 12/05/2022

Vaccinations

Name	Reminder	Date	Staff	Action	Status	Remind
Robin	Feline F3 + FIV	16/07/2025	C1		Due	
Robin	Txt Flea Remind...	16/07/2025	C1		Due	
Robin	Post op	18/07/2025	BW		Due	
Robin	Vaccinations	23/07/2025			Due	
Robin	Dental Check	23/07/2025	C1		Due	
Robin	Txt Flea Remind...	17/08/2025	C1		Due	

Unknown Since Pls Updt Bre

Save Cancel

Note: From the tool tip on appointment or billing screen you can click + button to quickly add Demeanours as well.

Tax Receipt for Grayson Richard (1002)

Grayson Richard

094892290

cfi.testacc@gmail.com

Owes: \$709.04

Robin (1001)

Cat Domestic Long Hair, (Male, 26/11/2023, Age: 1 yr 8 mth)

Last visit at 16/07/2025

Feline F3 + FIV due on 16/07/2025

Weight: 3.00 on 12/05/2022

Aggressive

+

Grayson Richard (# 1002)

Robin (# 1001)

Gender: Male, Entire Type: Cat

Breed: Domestic Long Hair Colour: Black

Age: 1 yr 8 mth

Consultation

Aggressive

Approach slowly and calmly, use a muzzle if needed, and avoid sudden movements or direct eye contact to prevent aggression.

Notes:

Robin will scratch and bite at any opportunity

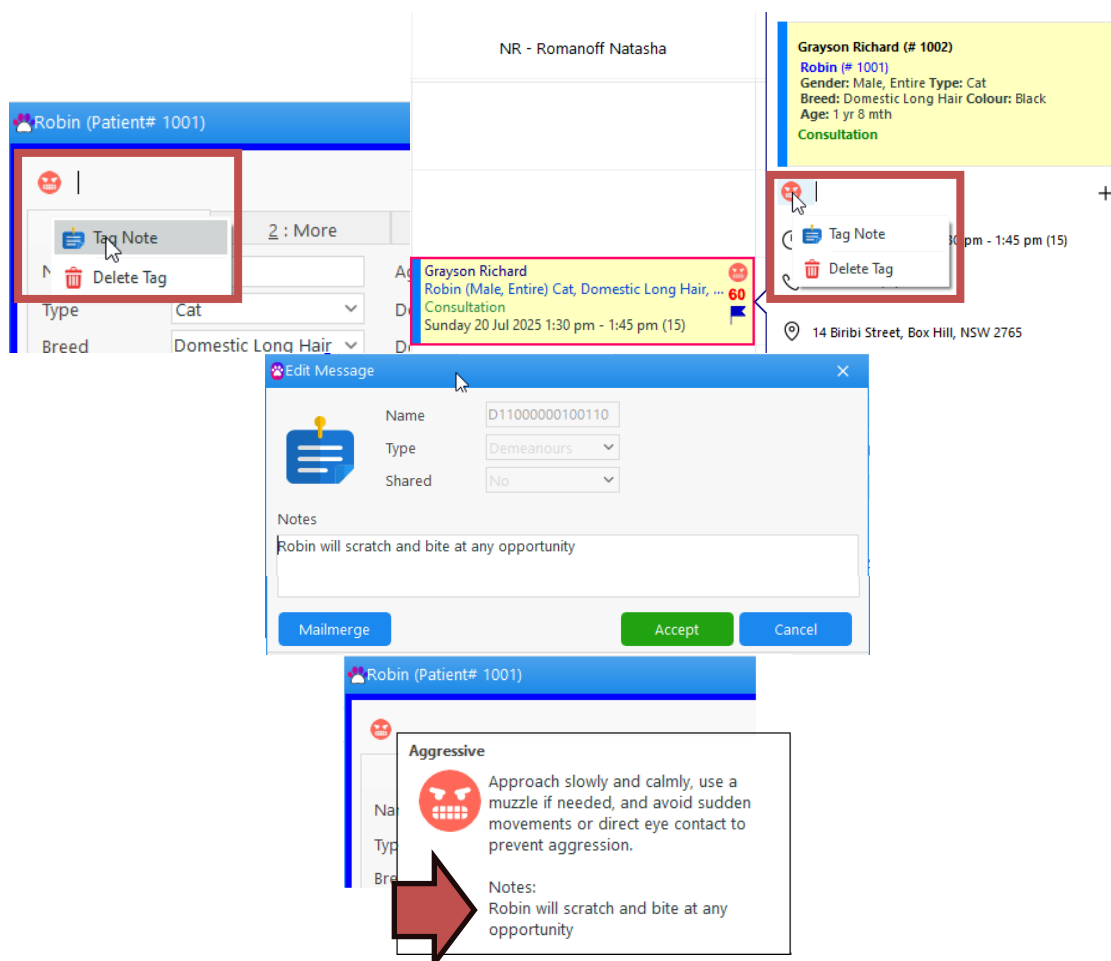
Created on 20/07/2025 5:27:11 pm

## How to Add Additional Note to Patient Demeanour

You can add an additional note to Demeanour to display give more information. This will display in the tooltip when you hover over the icon.

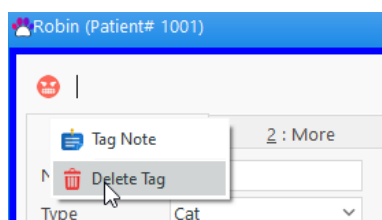
To add additional Note

1. Click the **Demeanour icon** in any location it displays
2. Click **Tag Note**
3. Enter Note and **Save**



## How to delete Demeanour from Patient

To delete a Patient Demeanour icon Click the Demeanour icon in any location it displays then select **Delete Tag**.



## Patient Major Diseases

Patient Major Diseases are used to add an icon to an animal indicating it's a Major disease or Condition for the patient. As well as the icon an additional note can be added to provide more information. Major Disease names, icons and where the icon should appear can all be customized.

Grayson Richard (# 1002)  
Robin (# 1001)  
Gender: Male, Entire Type: Cat  
Breed: Domestic Long Hair Colour: Black  
Age: 1 yr 8 mth  
Consultation

Grayson Richard  
Robin (Male, Entire) Cat, Domestic Long Hair, ... 60  
Consultation  
Sunday 20 Jul 2025 1:30 pm - 1:45 pm (15)

Respiratory Disease

Indicates breathing-related conditions; monitor for coughing, laboured breathing, and ensure low-stress environments.

Created on 20/07/2025 5:27:11 pm

60

## Access Levels

Patient Demeanours and Major Diseases use the same access levels (patient tags) that control who can create / edit tag names in picklist setup, who can add tags to patients records and who can delete tag's from patient records. To configure please follow steps below;

1. Go to **Options -> Setup**
2. **Staff** button
3. **Access** tab
4. Change **Show** to **Patient**
5. Set Access Level group that can do each of;
  - a. **Patient Tags Create / Edit** (this refers to setup of patient tags in Picklist Setup)
  - b. **Patient Tags Delete** (refers to who can delete tags from patient)
  - c. **Patient Tags Assignment** (who can add Patient Tags to patient)
6. Save and exit Setup
7. Check that Staff are then assigned to correct access level in their staff record in Staff tab.

**Staff Setup**

1 : Options 2 : Access 3 : Logins 5 : Grades

**Role Names** **Role Access Levels**

Show

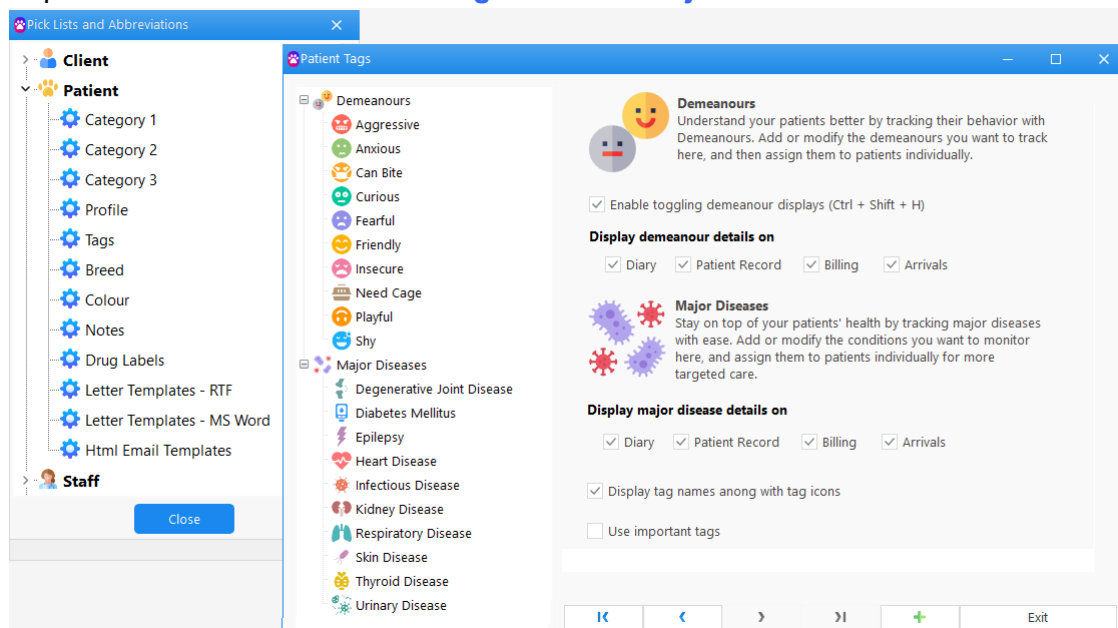
Name	Default	Owner	Desk	Vet	Admin	Manager	F	G	H
* Default	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
A Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
B Desk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
C Vet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
D Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
E Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
F F	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
G G	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
H H	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
J J	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
K K	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
L L	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Create	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Inactivation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Tags Create / Edit	<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"/>
Patient Tags Delete	<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"/>
Patient Tags Assignment	<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"/>
Make Insurance Claim	<input checked="" 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"/>

The grid on the right has the access levels for each Name from the above grid

Maintain Client Related Information such as Categories, Profiles and Addresses.

## Configuration of Major Disease Display and Actions

1. Go to **Options -> Picklists Setup**
2. Expand **Patient -> Double click Tags -> Select Major Diseases**



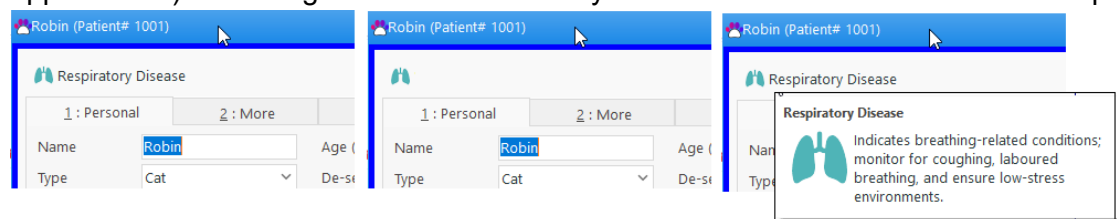
3. Configure how Major Diseases show in Vetlink

- a. **Display Major diseases on;**

Major Diseases can display on any of Diary, Patient Record, Billing Arrivals  
Just tick locations to display tags. (See section How Major Diseases will display for  
More information.

- b. **Display tag names along with tag icons**

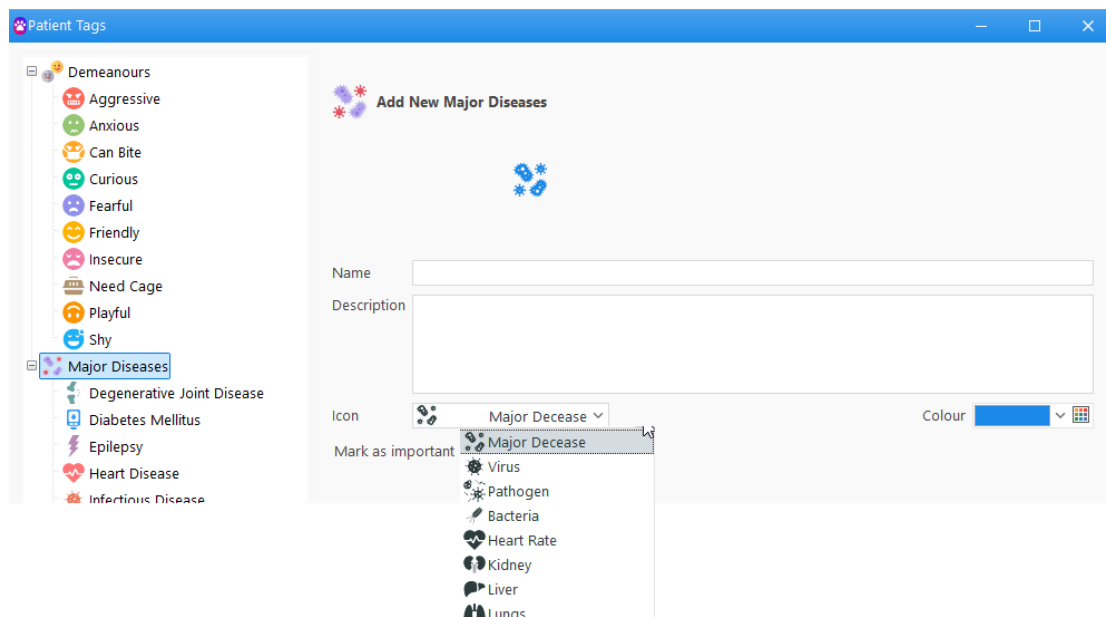
Ticking this option will show the Tag name next to the icon (apart from on  
appointment). Unticking will hide it. If hidden you can still view the name in the tooltip



- c. Use important tags

## Adding New Major Disease Type

1. Go to **Options -> Picklists Setup**
2. Expand **Patient -> Double click Tags -> Select Major Diseases**
3. You may need to Log in with ID and password depending on Access Level setup
4. Click **+** to add new Major Diseases
  - a. Add Major Disease name
  - b. Add a default Description
  - c. Select Icon from List
  - d. Choose colour for the icon
5. Click **Tick** to Save



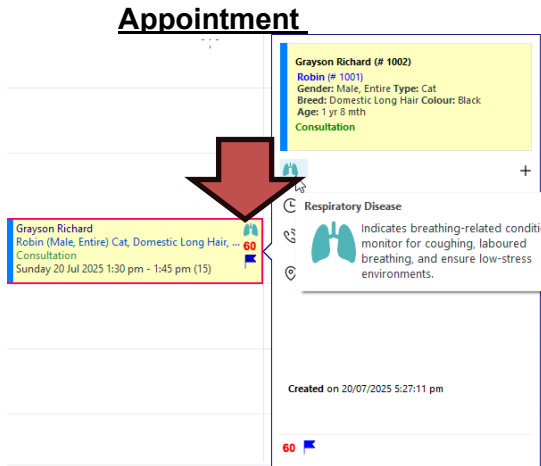
## Editing Existing Major Disease

1. Go to **Options -> Picklists Setup**
2. Expand **Patient -> Double click Tags -> Select Major Disease**
3. You may need to Log in with ID and password depending on Access Level setup
4. Select Major Disease to edit
5. Edits details as required
6. Click **Tick** to Save

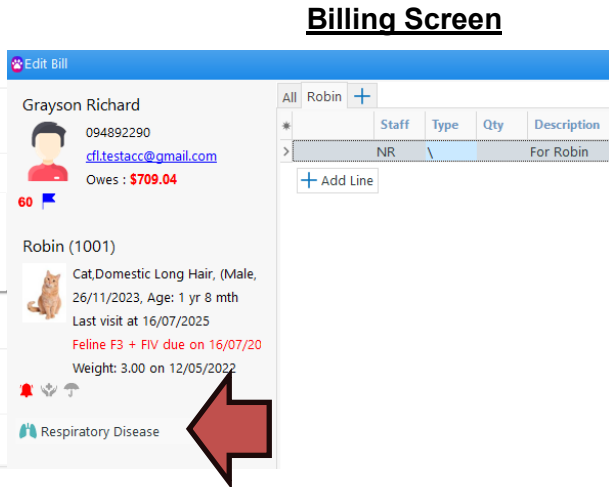
## How will Major Diseases display

Major Diseases will display on the on the records you have selected in Picklists. You can have your mouse over the icon to display the tool tip and see any additional notes.

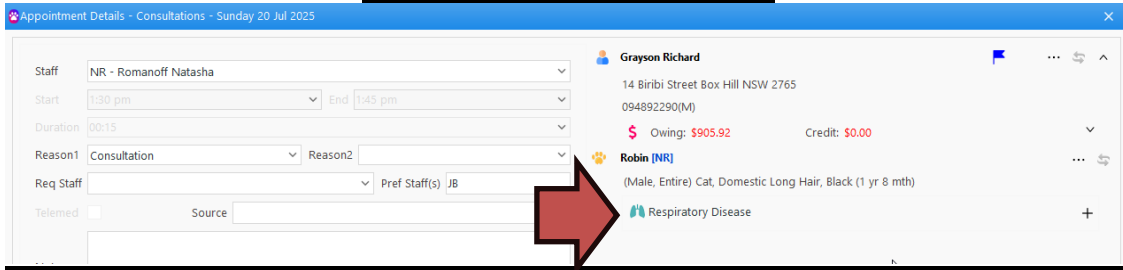
### Appointment



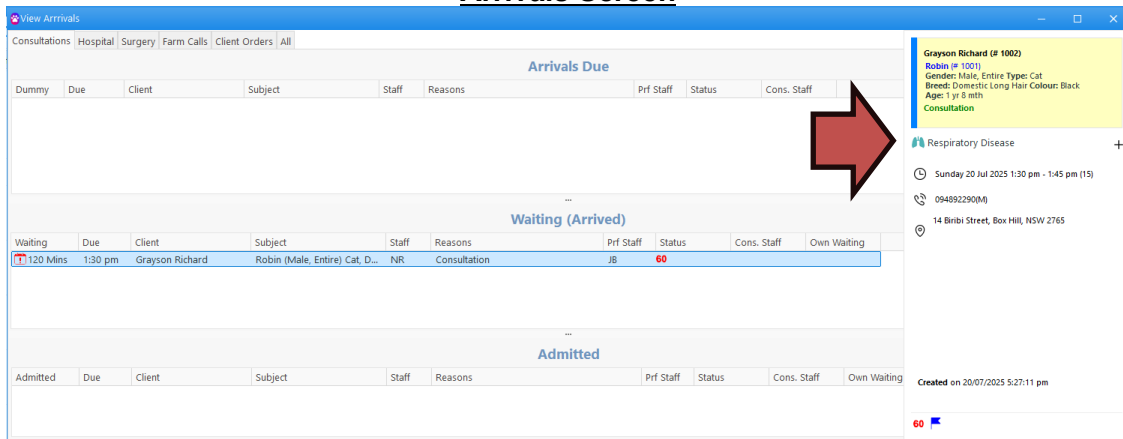
### Billing Screen



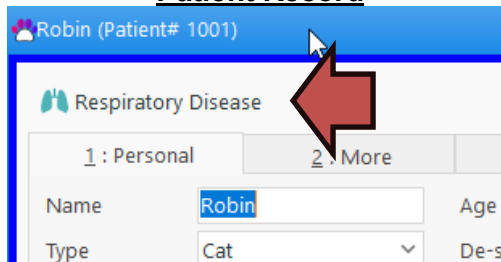
## Appointment Booking Screen



## Arrivals Screen



## Patient Record



## Adding, Editing and Deleting Major Diseases for Patient

### How to add a Major Disease to Patient

To add a Major Disease;

1. Open **Patient Record**
2. You may need to log in depending on access level setup
3. Click the **Major Disease icon**
4. Tick Major Disease to add to this patient

**Robin (Patient# 1001)**

1: Personal 2: More 3: History 4: Graphs 5: Doc Mgr 6: Handouts

Name: Robin Age (Y/M): 1/8 DOB: 26/11/2023

Type: Cat De-sexed: No on

Breed: Domestic Long Hair Deceased: No on

X with:

Colour: Black

Size:

Gender: Male

Prod'n: No

Status: Active

Code:

Chip Id:

First Vst: 22/05/2022

Last Vst: 16/07/2025

Herd Siz: 1

Weight:

Ideal:

Last: 3.00

CP: 12/05/2022

Owner: Grayson Richard (1002)

Chg To: Grayson Richard (1002)

Location: Grayson Richard (1002)

Due Reminders

Name	Reminder	Date	Staff	Action
Robin	Feline F3 + FIV	16/07/2025	C1	
Robin	Txt Flea Remind...	16/07/2025	C1	
Robin	Post op	18/07/2025	BW	
Robin	Vaccinations	23/07/2025		

Vaccinations

Date	Summary	Staff	Template	Bill	Lab Vet	Type
20/07/2025	Cat Abscess	OWN	AHENORMA	222		RCT
16/07/2025	StudyDescrip...	BW	AWEBLINK	184		RCT
16/07/2025		NR	BLANKA	184		RCT
8/07/2025	vax	JB	ALTNORMC	78		INV

Unknown

Since

Pls Updt Breed Dat

Respiratory Disease X

☐ Degenerative Joint Disease

☐ Diabetes Mellitus

☐ Epilepsy

☐ Heart Disease

☐ Infectious Disease

☐ Kidney Disease

☒ Respiratory Disease

☐ Skin Disease

☐ Thyroid Disease

Save Cancel

Note: From the tool tip on appointment or billing screen you can click + button to quickly add Major Diseases as well.

**Edit Bill**

Grayson Richard

094892290

cfl.testacc@gmail.com

Owes : \$709.04

Robin (1001)

Cat, Domestic Long Hair, (Male,

26/11/2023, Age: 1 yr 8 mth

Last visit at 16/07/2025

Feline F3 + FIV due on 16/07/2025

Weight: 3.00 on 12/05/2022

Respiratory Disease

+

Grayson Richard (1002)

Robin (1001)

Gender: Male, Entire Type: Cat

Breed: Domestic Long Hair Colour: Black

Age: 1 yr 8 mth

Consultation

Indicates breathing-related conditions; monitor for coughing, laboured breathing, and ensure low-stress environments.

Created on 20/07/2025 5:27:11 pm

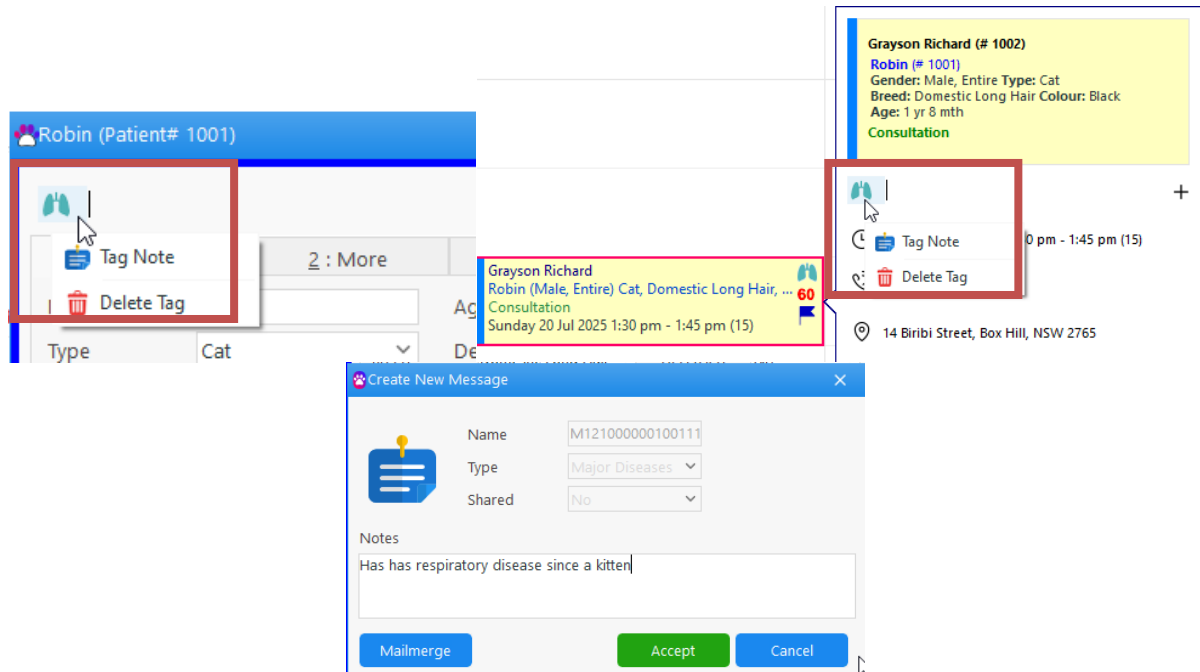


### How to Add Additional Note to Patient Major Disease

You can add an additional note to a Major Disease to display more information. This will display in the tooltip when you hover over the icon.

To add additional note

1. Click the **Major Disease icon** in any location it displays
2. Click **Tag Note**
3. Enter Note and Save



### How to delete Major Disease from Patient

To delete a Patient Major Disease icon click the Major Disease icon in any location it displays then select **Delete Tag**.

