intravet®
a Patterson Technology

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Please check FAQ 22559 for the most recent version of the User's Guide.

Contents

General Branch Setup

The General Branch Setup module allows you to enter your basic practice information. Each branch requires general information to be entered for day-to-day program use. General Branch Setup requires exclusive use, meaning that all users must exit from IntraVet before running this module.

To access this area, select Setup | Program | General Branch Setup.

Throughout the General Branch Setup, the Copy to all Branches button is available in the Menu Bar. Select this option to save the current information to all branches of your practice.

Each branch can be set up using unique data and color preferences. This will help you differentiate between branches at a glance and reducing the risk of posting information to the wrong branch.

Main Screen

Menu Bar

The Menu Bar allows you to access to the different areas of IntraVet.

- File – Allows access to the Control Center, Lab Results, Lab Programs, etc. as well as Exit the program.
- Account – Retrieve account information such as invoices, payments, transactions, etc.
- Communication – Searches can be run to locate clients, patients, patient reminders, recall generators, and more.
- Inventory – This will take you to Inventory Adjustments, Warehouse Transfers, In-House Usage, and more.
- Reports – Numerous reports can be run to provide a closer look at your business.
- Appointments – This will guide you to the hub of the practice, your appointment calendar.
- Boarding – From here you can access the availability of your boarding cages.
- Time Clock – Access to your time clock management.

- Messenger – Chat with employees within your practice to let them know when a patient is in the exam room.
- Setup – This is where you go to set up your system
- Windows – List the windows or screens currently open.
- Tools – System utilities and maintenance are accessed from here including the Printer Setup.
- Help – Locate the User's Guide, remote support, and information regarding your program.

File Account Communications Inventory Reports Appointments Boarding Time Clock Messenger Setup Windows Tools Help

These icons allow you to quickly access the most used portions of the software.

Open Account

Invoice

Payments

Estimates

Transactions

Prescriptions

Documents

Control Center

Wild Search Search Wild Search

Appointment Calendar

Boarding Availability

Pending Charges

Lab Results

Time Clock

ePetHealth – this button will open a web browser and take you to the ePetHealth provider portal home page

Change Branch/Warehouse Change Branch/Warehouse *(This only appears if you have more than 1 warehouse or branch.)*

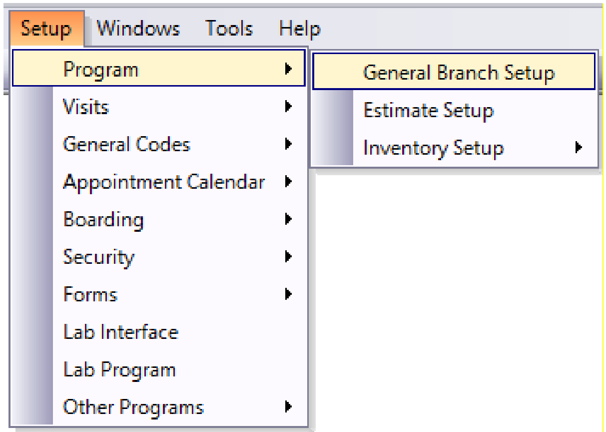
Close

General

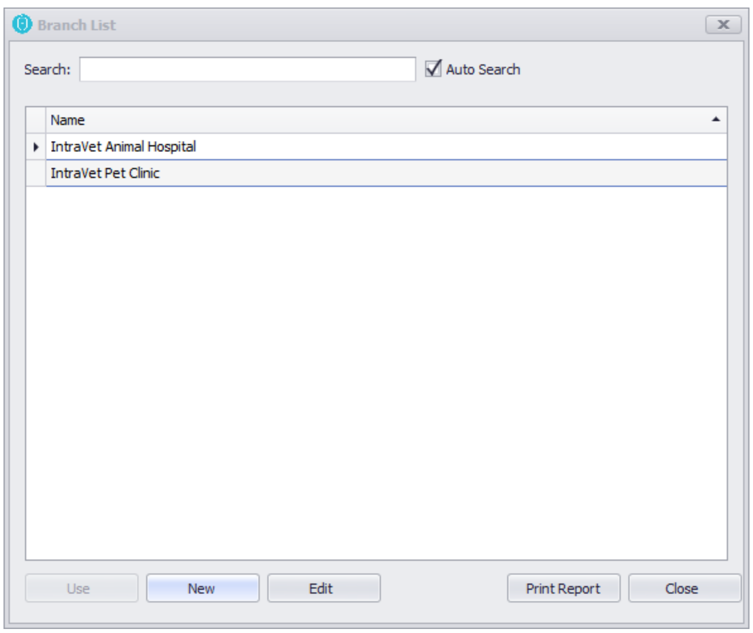
Create or Add a Branch

Once your initial branch has been entered, follow the same process from the Branch List screen by selecting the New button at the bottom of the screen. Repeat the process for entering additional branch's information.

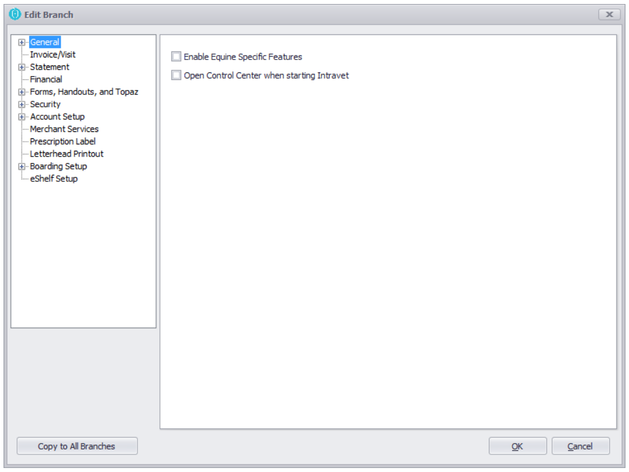
- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- **From the Branch List click New to create or Edit to make changes to a branch.**

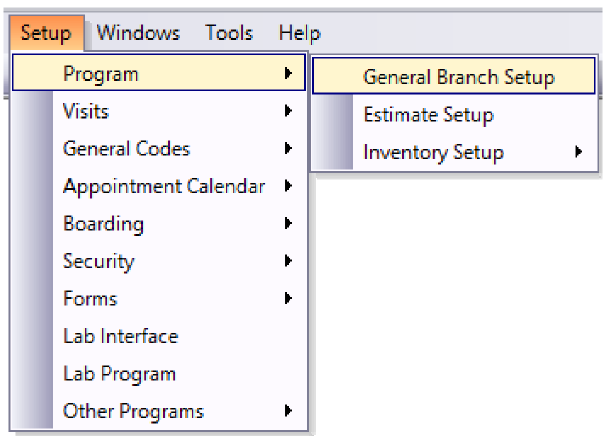


- **Click the Enable Equine Specific Procedures checkbox if you accept equine patients.**
- **Click the Open Control Center when starting IntraVet checkbox if you want the Control Center to open automatically when you start up IntraVet.**

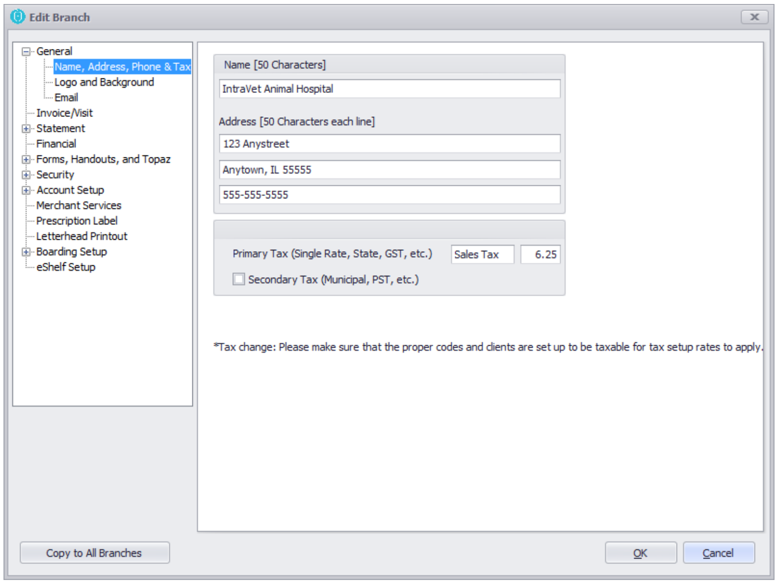


Name, Address, Phone and Tax

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- Select the Branch you wish to edit and choose Edit.
- Click the plus sign (+) in front of General. Select Name, Address, Phone and Tax.
- Add the branch Address. This information prints on documents such as invoices and certificates. Use the last line for the branch phone number if desired. Each field has a 50-character limit which includes letters, numbers, spaces and punctuation.
- Set up your tax information. If there is a Secondary Tax, select Secondary Tax and add a tax description. Enter the tax percent in the box. Be sure the codes and clients are marked as taxable.
- Click OK.

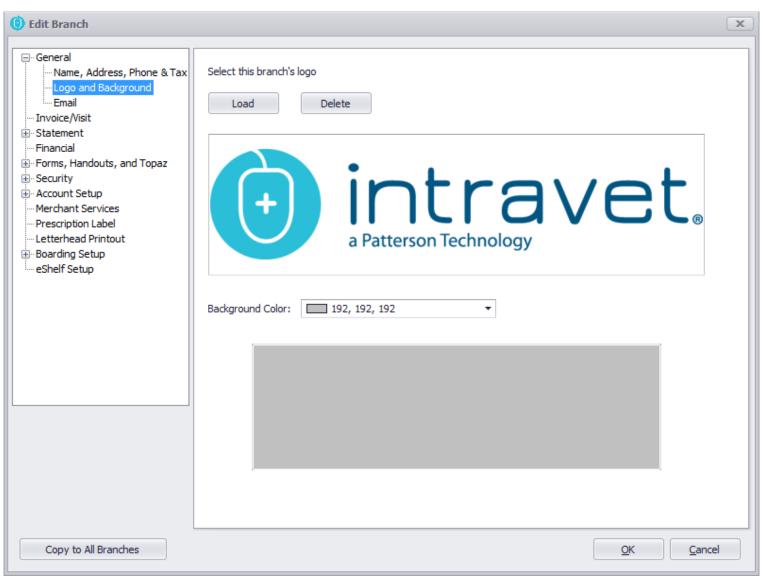


Logo and Background

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.
- Select the Branch you wish to edit. Click Edit.
- Click the plus sign (+) in front of General. Click Logo and Background.

NOTE: The logo should include the name, address and phone number of the practice. The logo represents those three fields on printed materials such as invoices, receipts, etc.
Logo file types must be JPEG or BMP. Size is 300 x 900 pixels.
If a logo is to be used, click the Load button and navigate to the location on the hard drive where the logo is stored.

- Click Load.



- Browse to locate the logo.
- You can select a different Background Color for each branch; this will help identify which branch you are logged into.
- Click OK to save your changes.

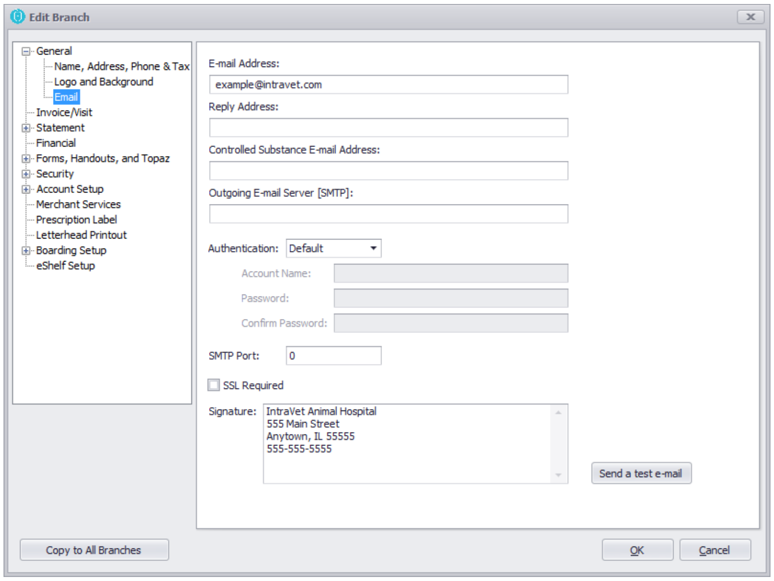
Email

IntraVet offers the ability to email reminders, medical histories, referral letters, and purchase orders. Send emails with attachments such as pictures, appointments, callbacks and reminders to individual clients and/or doctors.

Internet access and an email account are required to use IntraVet email. To send emails from a workstation, that workstation must have direct access to the Internet. If you are using Terminal Services or Citrix, the server must have access to the Internet.

To set up your email account information in IntraVet:

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.
- Select the Branch you wish to edit. Click New or Edit.
- Click the plus sign (+) in front of General. Select Email.
- Email Address – Enter your practice's email address.
- Reply Address – Enter the address the reply emails are to come to (usually the same as your practice email address).
- Controlled Substance E-mail Address – The email address that you will email your controlled substance report to.
- Outgoing Email Server (SMTP) – Contact your local Internet Service Provider (ISP). Your systems/network administrator or IT consultant can obtain this information. Sometimes this information can be found on your email provider's website.
- Authentication – Select None, Default, or Custom.
- Account Name – Use your practice's email address.
- Password / Confirm Password – Ask your ISP for assistance.
- SSL Required – Ask for assistance from your ISP.
- SMTP Port – Ask for assistance from your ISP.
- Signature – To save time, an automatic signature containing your contact information (practice name, address, etc.) can be provided at the end of every email.
- Send a test email – Send your practice an email. If the email is received, it confirms that the email settings are correct.
- Click OK to save your changes.

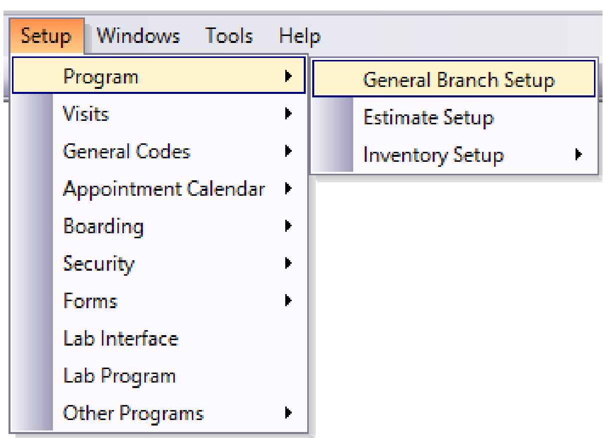


Invoice

Invoice/Visit

The setup options for invoice allow you to decide which settings work best for your practice. Changes made to Invoice setup take effect immediately. The changes do not affect invoices made in the past.

- **From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.**



- **From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.**
- **Highlight Invoice/Visit.**

Printing Options, when box is checked:

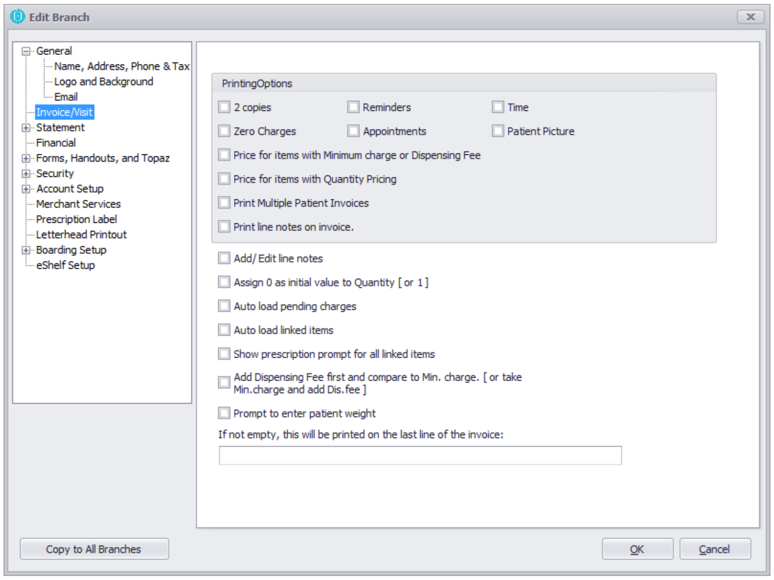
- **2 copies – Will print 2 copies of the invoice.**
- **Reminders – Print patient reminders on the invoice.**

- Time – A timestamp for the transaction prints on the invoice.
- Zero charges – The unit price of 0.00 prints on the invoice line. If this box is unchecked, no value prints on the invoice line.
- Appointments – A reminder for future scheduled appointments prints on the invoice.
- Patient Picture – The patient picture assigned to this pet prints on the invoice. If this box is unchecked or no picture is assigned to a patient, an empty box appears where the picture would normally be displayed. Refer to the Appointments, Add New Client chapter for instructions about attaching the patient's image to the account.
- Price for items with Minimum charge or Dispensing Fee – The invoice prints the adjusted unit price on items for which a minimum charge or dispensing fee applies. If this box is unchecked, the invoice leaves the price column blank and prints only the quantity and charge amount for the entire line.
- Price for items with Quantity Pricing – The invoice prints the adjusted unit price on items with quantity pricing. If this box is unchecked, the unit charge does not print.
- Print Multiple Patient Invoices – Invoices for multiple patients print on the same invoice. If this box is unchecked, the program generates an invoice for each patient.
- Print line notes on Invoice – When checked the line note will print with the invoice.

Additional Invoice/Visit Options

- Add/Edit line notes – When checked you will be able to add and/or edit line notes.
- Assign 0 as the initial value to Quantity [or 1] – The operator must enter a quantity each time an item is invoiced. If this box is unchecked, the default quantity will be one (1) for each invoice item.
- Auto Load Pending Charges – Charges automatically load, pausing only for rabies tag, patient ID, x-ray number, lot and serial number on rabies vaccinations, printing certificates and R_X labels. If this box is unchecked, there will be the option to review and change the data on each line as it is entered.
- Auto Load Linked items – Charges load automatically, pausing only for rabies tag, patient ID, x-ray number, lot and serial number on rabies vaccinations, printing certificates and R_X labels. If the box is unchecked, there is the option to review and change the data on each line as it is entered.
- Show prescription prompt for all linked items – If checked a prescription prompt appears for each of the linked items.
- Add Dispensing Fee first and compare to Min. charge [or take Min. charge and add Dis. fee] – The dispensing fee will charge in addition to the charge for the product. If the sum is less than the minimum charge, the minimum charge is posted. If this box is unchecked, the program uses the minimum charge for items priced below minimum and then adds the dispensing fee.
- Prompt to enter patient weight – It will prompt you to enter the patient weight at the time of the invoice.

- The blank line at the bottom of the window can be used to include a standard message on each invoice. Examples of commonly used messages are practice slogans, hours of operation, emergency practices for after hours, etc.
    - *There is a 116-character limit. Letters, numbers, spaces and punctuation are included in the character count.*
- Click OK to save your changes.



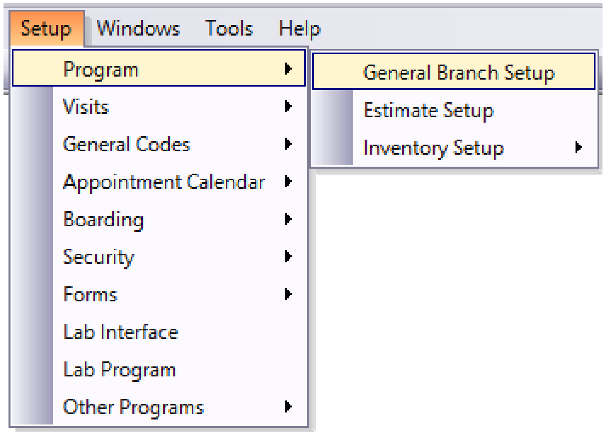
Statement

Statement Setup

Statement setup defines the monthly statement parameters. These parameters are the general guidelines for the preparation of monthly billing statements. You can customize client accounts individually by editing the selections that affect the monthly statements in the Setup screen of Edit Client.

Whether or not to charge billing fees and interest is an option at the time of billing, so even if monthly interest and billing fees have been defined, the client is not charged unless the account has been set to receive these charges, and the program was set to charge the client at the time when monthly statements are generated.

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.

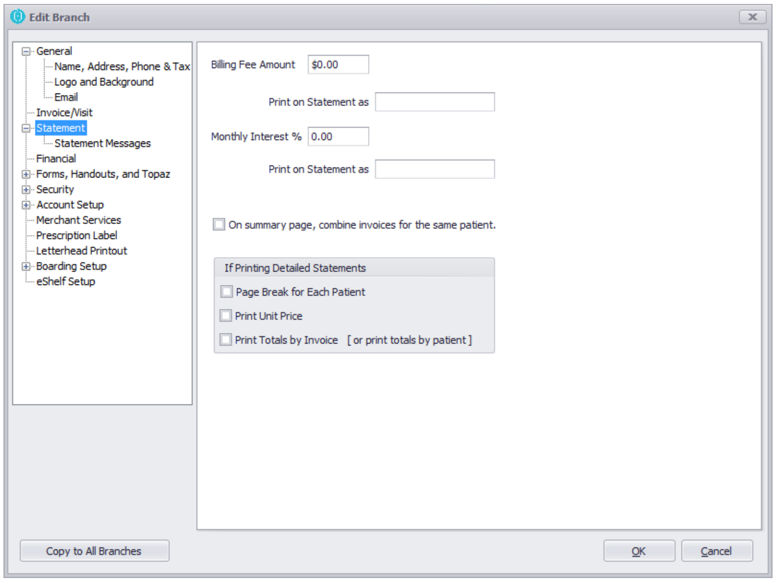


- **From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.**
- **Select Statement.**
- **Billing Fee Amount – Enter the amount to be charged for a Billing Fee, if any.**
- **Print on Statement as – Enter the description you want printed on the statement for the Billing Fee Amount.**
- **Monthly Interest % – Enter the percentage to be charged for Monthly Interest, if any.**
- **Print on Statement as – Enter the description you want printed on the statement for Monthly Interest Fee.**
- **On Summary Page, Combine Invoices for the Same Patient – When this box is checked, the summary page displays a total for the combined outstanding invoices for the patient without a description of the individual visit totals.**

If Printing Detailed Statements

When printing detailed statements, you have three additional options. When checked:

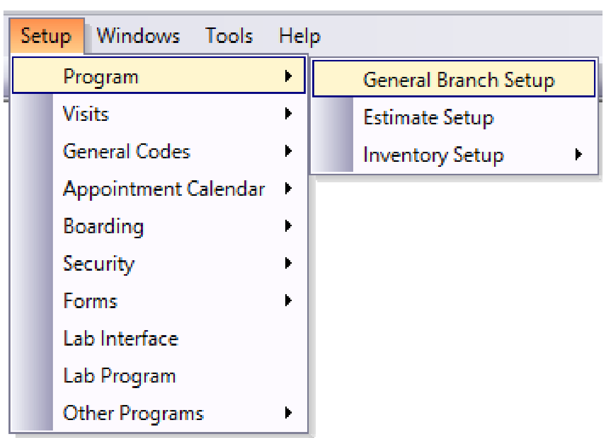
- **Page Break for Each Patient – A separate detailed statement prints for each patient. If unchecked, patients are combined onto the same page, if possible, but detailed separately.**
- **Print Unit Price – Clients will see the price per unit on the monthly statement. When unchecked, only the quantity and total amount prints.**
- **Print Totals by Invoice [or Print Totals by Patient] – The details with a total for each invoice prints. When unchecked, the list of details for the whole billing period and total for each patient is provided.**
- **After selections have been made, click OK to save your changes.**



Statement Messages

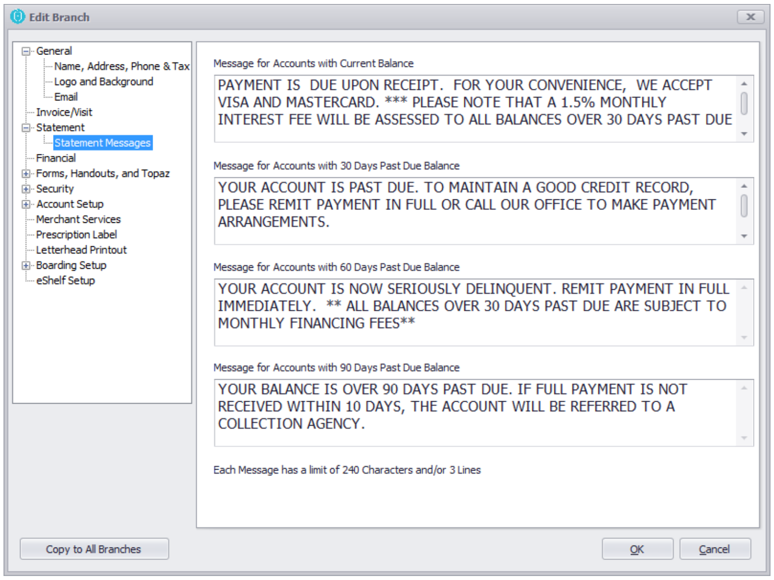
Statement Messages can be printed on the statements to remind clients about the status of their accounts. When statements are generated, printing statement messages can be selected or turned off. Statement messages may be changed at any time. Changes take effect immediately after they have been saved.

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.
- Select the plus sign (+) in front of Statement.
- Select Statement Messages.
- Enter a message for current, 30, 60 and over 90-day balances. On statements, the message prints for the oldest balance the client holds.
- Click Copy to All Branches if you have more than one branch and all branches use the same statement message.

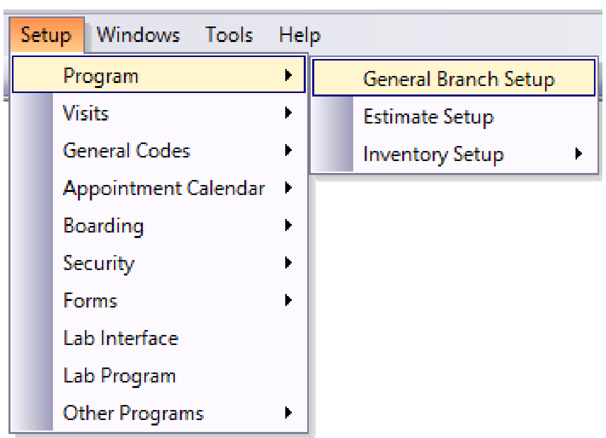
- Click OK to save your changes.



Financial

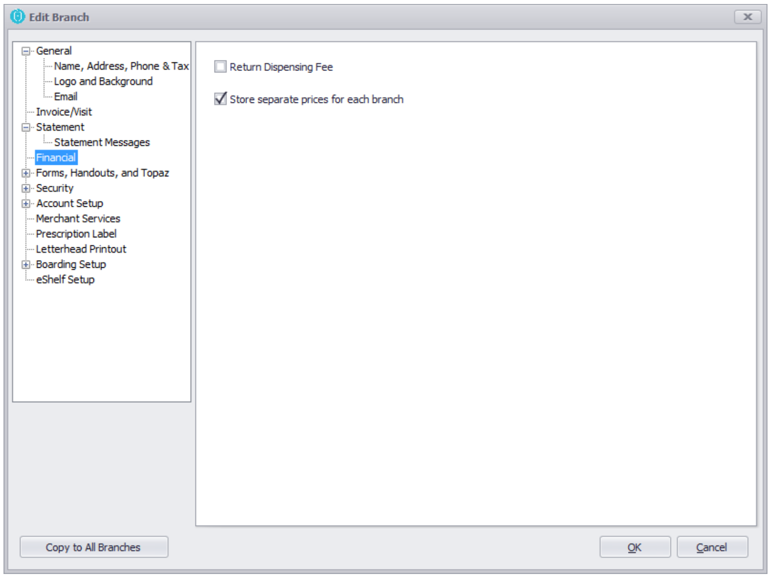
Financial

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.
- Select Financial.
- Return Dispensing Fee – Check the box to activate the option to return the dispensing fee for inventory items invoiced with a dispensing fee when processing client returns.
- Store separate prices for each branch – Check the box to allow separate pricing for each individual branch.
- Copy to All Branches – Click this option if all branches use the same information.

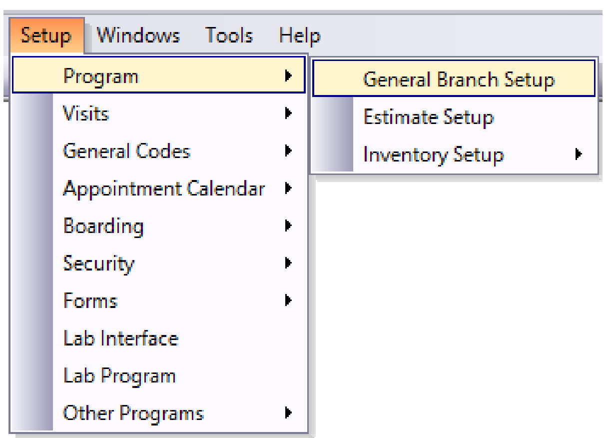
- Click OK.



Forms, Handouts and Topaz

Forms, Handouts and Topaz

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.

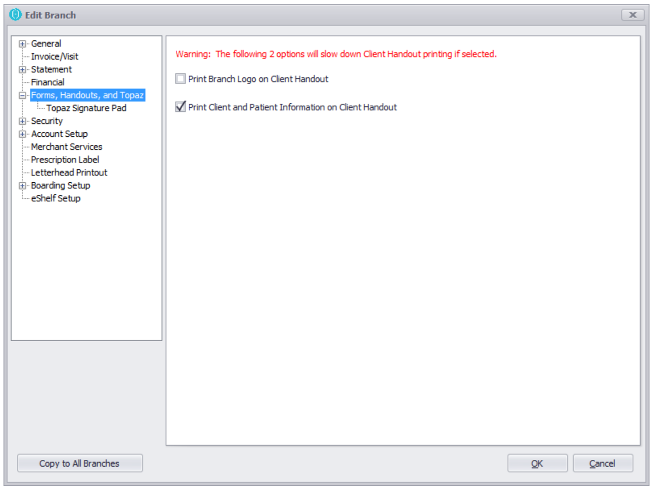


- From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.
- Select Forms, Handouts and Topaz.
- Print Branch Logo on Client Handout – If checked, the branch logo prints on client handouts and forms. When box is unchecked, the practice header prints on client handouts and forms. See: General/Logo and Background for instructions in attaching a logo.

Print Client and Patient information on Client Handout – If checked, client and patient information prints as header on client handouts and forms. When box is unchecked, no client or patient information prints as a header on the client handouts and forms.

Copy to All Branches – Click this option if all branches use the same print options.

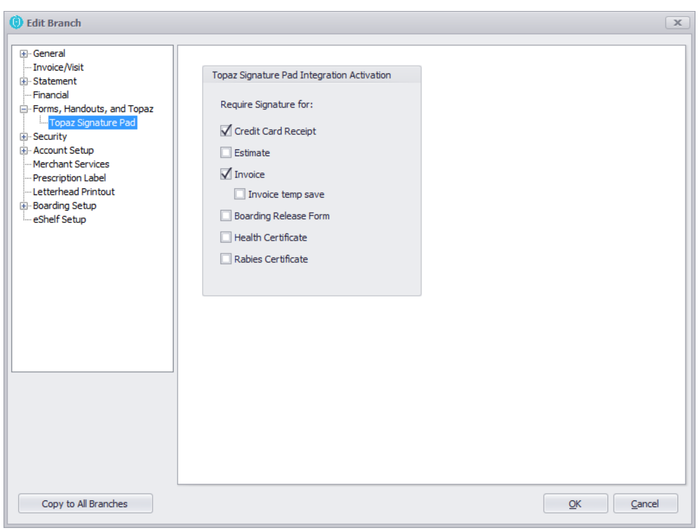
- Click OK to save your changes.



Topaz Signature Pad Integration

To set up your Topaz Signature pad integration, go to General Branch Setup | Forms, Handouts, and Topaz | Topaz Signature Pad and select the areas in which you would like to prompt for a signature.

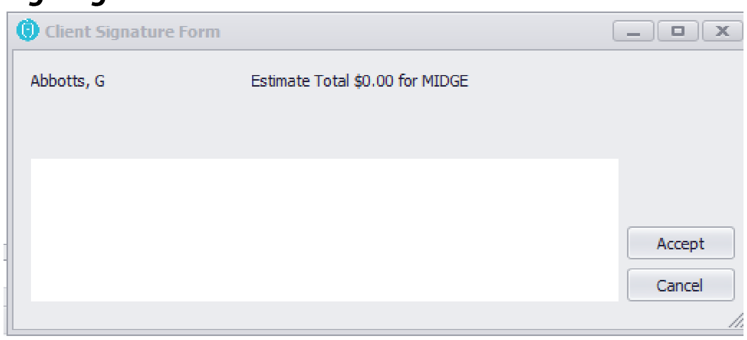
The signed documents are stored as PDF files. A reader such as Adobe Reader will need to be installed for you to view these files.



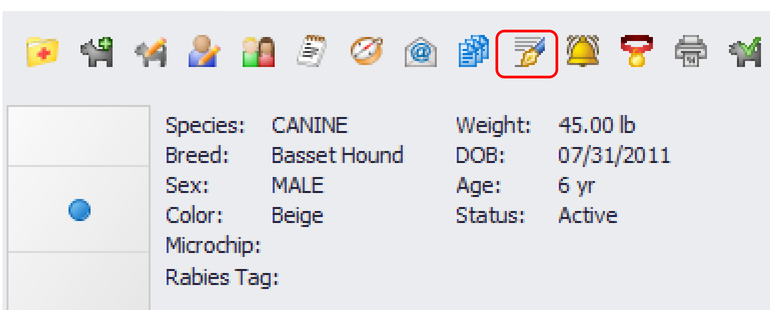
You can collect signatures in the following areas:

- Credit Card Receipt | Customer Signature
- Estimate | Customer Signature
- Invoice | Customer Signature
- Boarding Release Form | Customer Signature
- Health Certificate | Veterinarian Signature
- Rabies Certificate | Veterinarian Signature

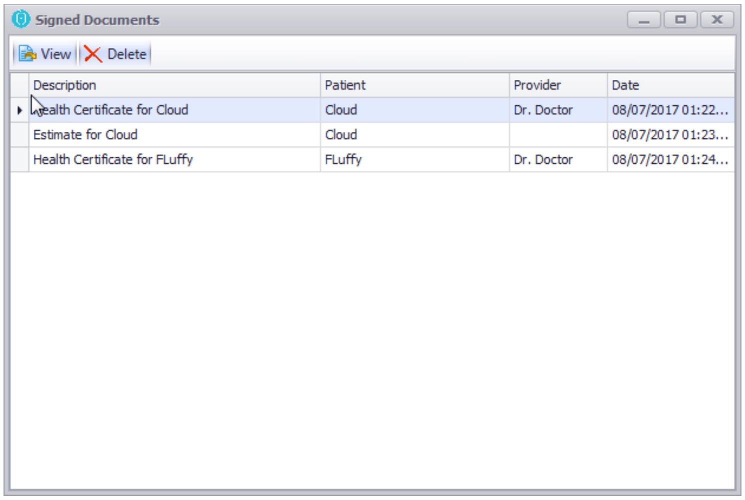
Signing a Document



Sign a document with the Topaz Signature Pad, then select Accept. A message appears on the pad that it saved successfully.
The signed document will be stored in Client Account Management. To view signed documents, select the Signed Documents button.



The Signed Documents list window appears.



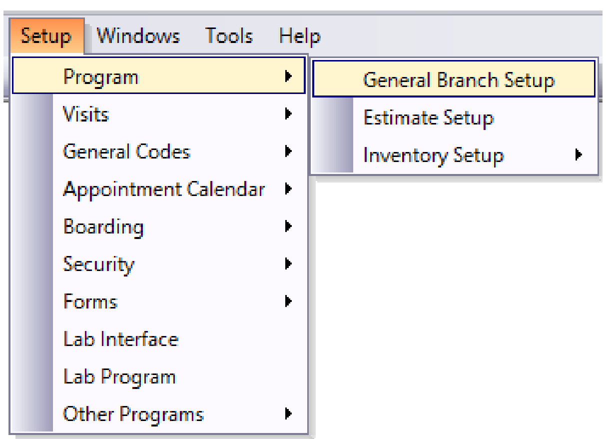
Use the column headings to sort the list. Select a document and the View button to view, print or reprint a stored signed document.

Security

Security

It is important to note that you must first set up the Users and their passwords with security access prior to enabling the security access prompts under General Branch Setup. This can be found under ***Setup | Security | User Setup****.*

- **From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.**



- **From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.**
- **Select Security to highlight.**

- Under Security Setup – Branch Specific, select the appropriate option:
    - No Security Prompts – There will not be any security prompts for auditing if this option is selected. This option is only recommended for single user systems where users need not be tracked.
    - Username Only – This will prompt for the username only, not the password. This option is the minimum recommended for most practices. Username Only is not intended to block access from areas of IntraVet, but to audit who has entered or made any changes with the areas of the program.
    - Username and Password – This will prompt for both the username and password for security/auditing purposes. This option is recommended for practices where the highest level of security and auditing is required. Username and password requirements ensure that areas of IntraVet can be blocked from being used. For example, transactions and/or payment deletions can be blocked for certain users in your practice.

Under Enable Security – System Wide, select the appropriate options:

- Account Management – Invoice – Select this option to enable security in the Invoice tab. When enabled, the Invoice tab will prompt you to enter the security audit method selected above (No Security Prompts, Username only or Username and Password).
- Account Management – Medical History – Select this option to enable security in Medical History. When enabled, saving anything in Medical History will prompt you to enter the security audit method selected.
- Account Management – Transactions – Select this option to enable security in the Transactions tab. When enabled, saving anything in Transactions will prompt you to enter the security audit method selected.
- Account Management – Other – Select this option to enable security in the other areas of the Client Account Management screen. When enabled, saving anything in the Client Account Management screen such as payments, prescriptions, edit client, edit patient, reminders, and more will prompt you to enter the security audit method selected.
- Appt Calendar – Select this option to enable security in the Appointment Calendar. When enabled, saving anything in the Appointment Calendar will prompt you to enter the security audit method selected.
- Boarding – Select this option to enable security in Boarding. When enabled, saving anything in Boarding will prompt you to enter the security audit method selected.
- Communications – Select this option to enable security in Communications. When enabled, saving anything in Communications will prompt you to enter the security audit method selected.
- Inventory – Select this option to enable security in Inventory. When enabled, saving anything in Inventory will prompt you to enter the security audit method selected.
- Maintenance – Select this option to enable security in Maintenance. When enabled, saving anything in Maintenance will prompt you to enter the security audit method selected.

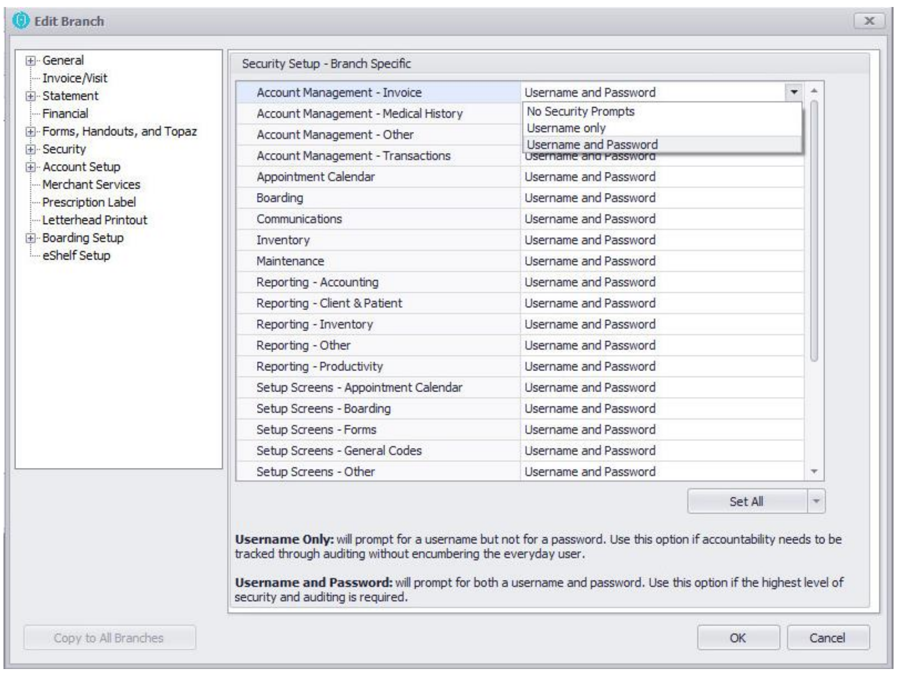
- Reporting – Accounting – Select this option to enable security in Accounting Reports. When enabled, saving anything in Accounting Reports will prompt you to enter the security audit method selected.
- Reporting – Client & Patient – Select this option to enable security in Client and Patient Reports. When enabled, saving anything in Client and Patient Reports will prompt you to enter the security audit method selected.

*These are 2 separate reports that have been grouped together for your convenience.

- Reporting – Inventory – Select this option to enable security in Inventory Reports. When enabled, saving anything in Inventory Reports will prompt you to enter the security audit method selected.
- Reporting – Other – Select this option to enable security in all other Reports that have not been listed separately. When enabled, saving anything in these Reports will prompt you to enter the security audit method selected.
- Reporting – Productivity – Select this option to enable security in Productivity Reports. When enabled, saving anything in Productivity Reports will prompt you to enter the security audit method selected.
- Setup Screens – Appointment Calendar – Select this option to enable security in the Setup Appointment Calendar Screens. When enabled, saving anything in Setup Appointment Calendar Screens will prompt you to enter the security audit method selected.
- Setup Screens – Boarding – Select this option to enable security in Boarding Setup Screens. When enabled, saving anything in Boarding Setup Screens will prompt you to enter the security audit method selected.
- Setup Screens – Forms – Select this option to enable security in Forms Setup Screens. When enabled, saving anything in Forms Setup Screens will prompt you to enter the security audit method selected.
- Setup Screens – General Codes – Select this option to enable security in General Codes Setup Screens. When enabled, saving anything in General Codes Setup Screens will prompt you to enter the security audit method selected.
- Setup Screens – Program & Security – Select this option to enable security in Program and Security Setup Screens. When enabled, saving anything in Program and Security Setup Screens will prompt you to enter the security audit method selected.
- Setup Screens – Visits – Select this option to enable security in Visits Setup Screens. When enabled, saving anything in Visits Setup Screens will prompt you to enter the security audit method selected.
- Setup Screens – Other – Select this option to enable security in all other Setup Screens that have not been listed separately. When enabled, saving anything in these Setup Screens will prompt you to enter the security audit method selected.
- Utilities – Client & Patient – Select this option to enable security in Client and Patient Utilities. When enabled, saving anything in Client and Patient Utilities will prompt you to enter the security audit method selected.
- Utilities – Code Utilities – Select this option to enable security in Code Utilities. When enabled, saving anything in Code Utilities will prompt you to enter the security audit method selected.

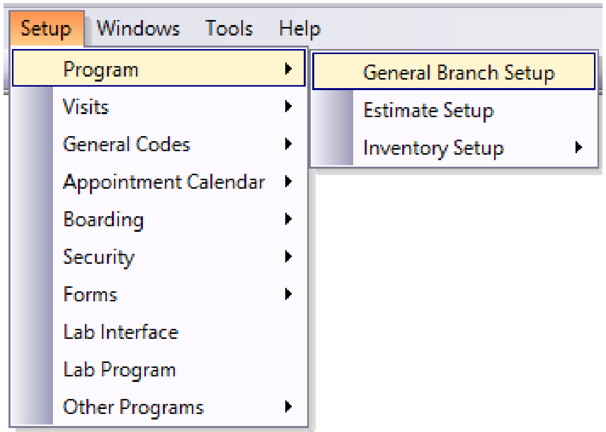
- Utilities – Financial – Select this option to enable security in Financial Utilities. When enabled, saving anything in Financial Utilities will prompt you to enter the security audit method selected.
- Utilities – Time Clock – Select this option to enable security in Time Clock Utilities. When enabled, saving anything in Time Clock Utilities will prompt you to enter the security audit method selected.
- Utilities – Other – Select this option to enable security in all other Utility Screens that have not been listed separately. When enabled, saving anything in these Utilities will prompt you to enter the security audit method selected.

- Set All – You have the option to set all areas at one time and then edit the ones needed.
- Click Copy to All Branches if all branches use the same security settings.
- Click OK.



Security Options

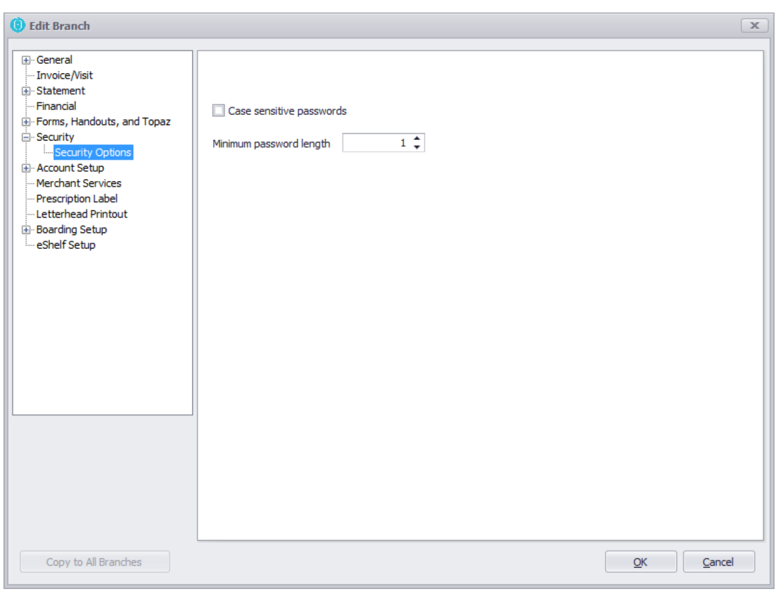
- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.

Select the plus sign (+) in front of Security.

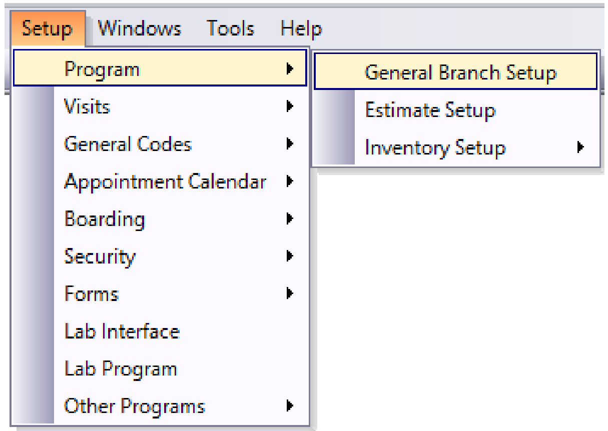
- Select Security Options to highlight.
- Check the box if passwords are to be case sensitive. (If passwords are typed in all upper- or lowercase letters, or a combination, it must match exactly each time it is entered.)
  - Minimum password length – Choose a number that will represent the minimum number of characters for passwords. This means no passwords can be less than the number entered in this field.
- Click Copy to All Branches if all branches use the same operator ID and password settings.
- Click OK.



Account Setup

Account Default Settings

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



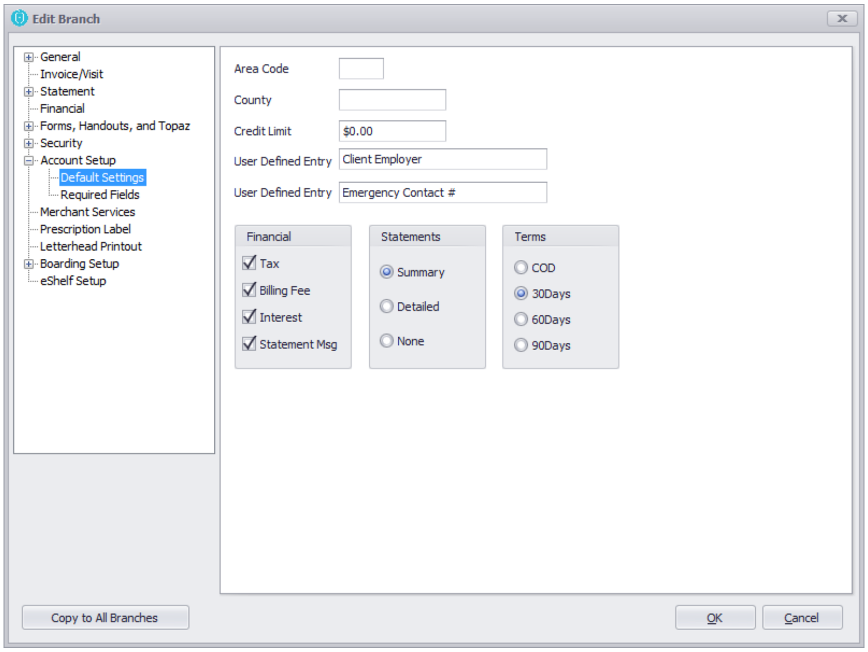
- From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.

Select the plus sign (+) in front of Account Setup.

- Select Default Settings.

To simplify entry and to save time, variables can be defined for new clients. These defaults can be changed, when adding a new client.

- Variables that can be entered include:
    - Area Code – Enter the most commonly entered area code for your practice.
    - County – Enter the most common county for clients in your practice.
    - Credit Limit – Enter the credit limit most commonly entered for the clients in your practice. Setting a credit limit does not prevent a client from exceeding it. There will be no warning if the client exceeds their limit. Credit limits can be viewed on the screen and can be overwritten on individual client accounts. Leave EMPTY ($0) if the practice does not extend credit.
    - User Defined Entry – Use these two fields for any additional information needed in the client database.



Financial

- Tax – If checked, all new clients will be taxed on taxable items. If a tax charge is not wanted for any client, leave this box unchecked.
- Billing Fee – If checked, new clients are charged a billing fee on monthly statements. If unchecked, new clients do not receive billing fees on monthly statements.
- Interest – If checked, a new client will be charged monthly interest on any past due balance. If left unchecked, a client is charged for monthly interest.
- Billing Fee and Interest are applicable only if a Billing Fee has been set up in Statement Setup.
- Statement Msg – If checked, a new client receives statement messages on their monthly statement.

Statements

There are three (3) options for statements; choose only one statement type to set as the default.

- Summary – Clients receive a one-page statement reflecting all invoices, payments and account debits and credits.
- Detailed – Clients receive a statement showing the line-by-line detail of every charge on every invoice, separated by patient.
- None – Clients do not receive a statement, even if the client has an unpaid balance.

Terms

There are four (4) options for terms; choose only one type to set as the default.

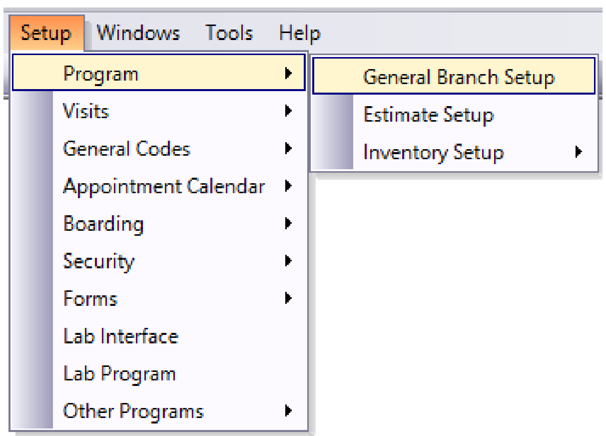
- COD – Calculates interest charges on items not paid, the day after the service was rendered.
- 30 Days – Calculates monthly interest charges only on items not paid within 30 days after the date of service.
- 60 Days – Calculates monthly interest charges only on items not paid within 60 days after the date of service.
- 90 Days – Calculates monthly interest charges only on items not paid within 90 days after the date of service.

Required Fields for New Clients

Certain client information can be set up to be marked as required. The required information must be entered into the system before the account can be fully created.

If you attempt to save an account with missing required information, you will receive an error message stating which field is missing data. You will continue to receive an error message until all data in the required fields has been entered.

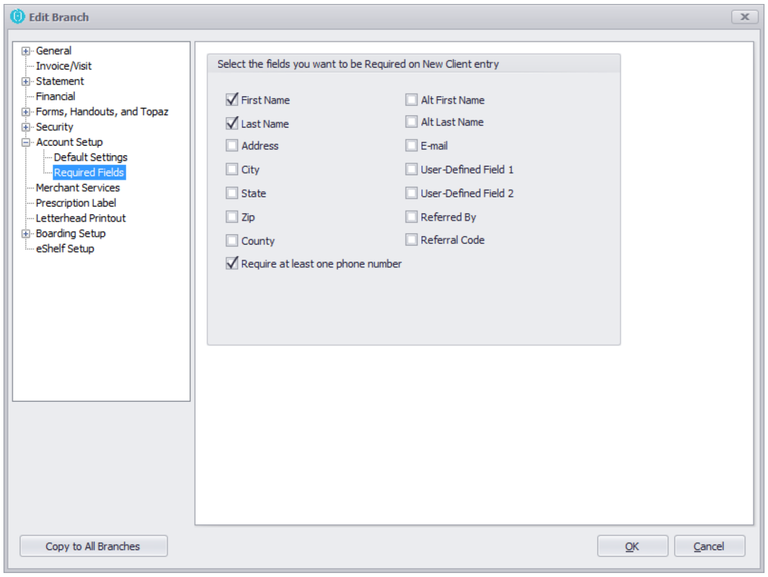
- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.

Select the plus sign (+) in front of Account Setup.

- Select Required Fields.
- Check the fields required to be completed when setting up a new client.
- Click OK to save your changes.



Merchant Services

XCharge Merchant Services

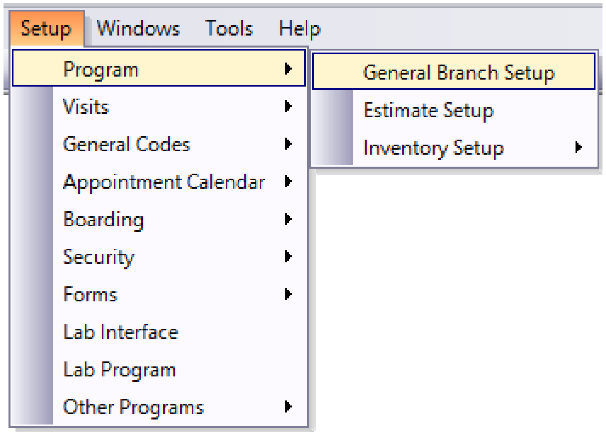
XCharge, a product of OpenEdge, is fully compatible with the EMV requirements for using next generation fraud-reducing, chip-based credit cards.

XCharge Merchant Services software processes credit and debit card transactions. Sales, voids, and returns are processed and approved through IntraVet by dipping or swiping a card through a card reader that is connected to the workstation. This eliminates the need to process a transaction through a separate credit card reader and then again through IntraVet.

XCharge is an eService. Please contact the IntraVet Sales team at 1.877.422.8838 for more information.

In addition to selecting the option for Merchant Services within IntraVet, a path must be set to the folder that will store the Merchant Services information. If a PIN Pad for debit transactions will be used, this must also be set up. All other users must exit from IntraVet before setting up this module.

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.

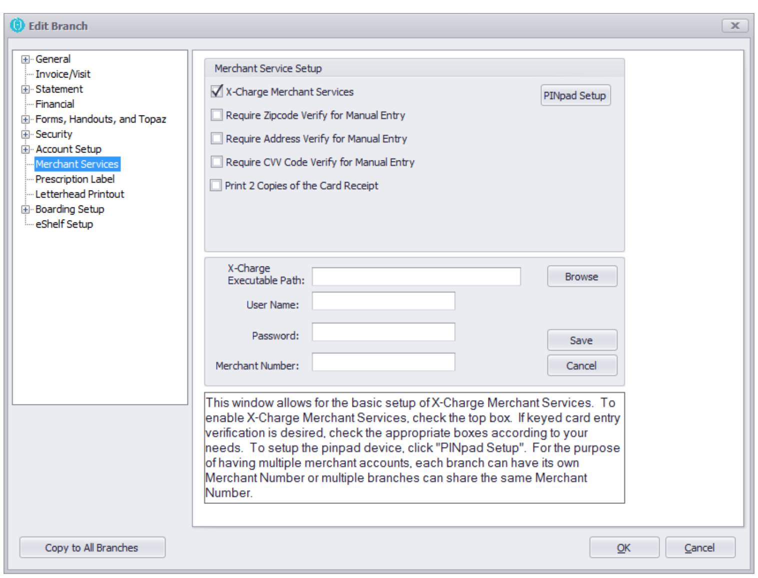
Select Merchant Services.

- Check X-Charge Merchant Services to turn on credit and debit card processing inside of IntraVet.
- For more secure processing (when a credit card account number card is manually typed rather than swiped or dipped), check Require Zip Code Verify, Require Address Verify, and Require CVV Code Verify.

If those three options are checked it can also lower merchant processing charges for hand-entered accounts. It requires additional fraud detection measures at the point of sale.

It is recommended to check Print 2 copies of the Card Receipt.

- Fill in the X-Charge Data Path for your Merchant Transactions. This is typically set up by IntraVet Support or the XCharge Installation team.
- Key in your practice's XCharge user name, password, and merchant number. Please call XCharge Support at 888.414.7495 for assistance with this information.

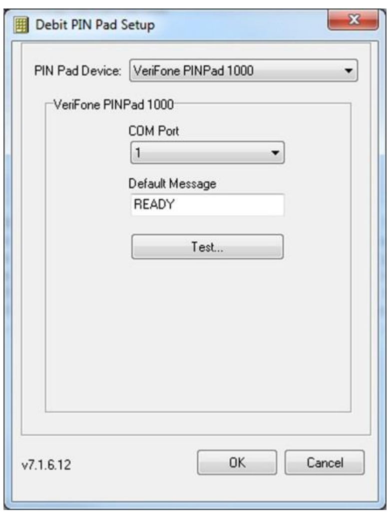


Debit PIN Pad Setup

- Click the PINpad Setup button. This opens the Debit PIN Pad Setup window.
- PIN Pad Device – Select the type of PIN Pad that is being used.
- COM Port – Select the COM Port into which the PIN Pad device is plugged.
- Default Message – automatically set to READY. This message appears on the PIN Pad when it is ready for use (commonly changed to “Thank You”).
- Test Button – Click the Test button to verify that the PIN Pad is communicating correctly with the COM Port that was selected. If it is the correct port, the PIN Pad will ask for a password. “1234” can be entered as the password and press Enter on the PIN Pad.

(If it does not connect, try another COM port from the drop-down menu.)

- Click OK.

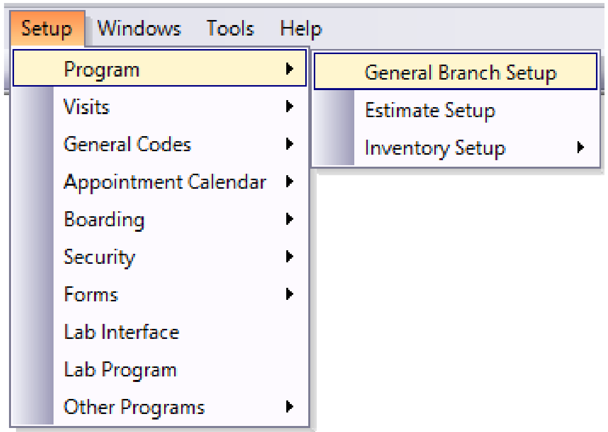


Prescription Label

Prescription Label

To set up the default prescription label settings:

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- **From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.**

Select Prescription Label.

Check the box to Use Default Branch Header Information. This will automatically set up the first three lines of the prescription label to match the previously entered name and address under General options. If you would like different information, leave the box unchecked and type the desired prescription label information into the Label Directions box.

The Label Directions box has a 240-character and/or a 3-line limit. Letters, numbers, spaces and punctuation are included in the character count.

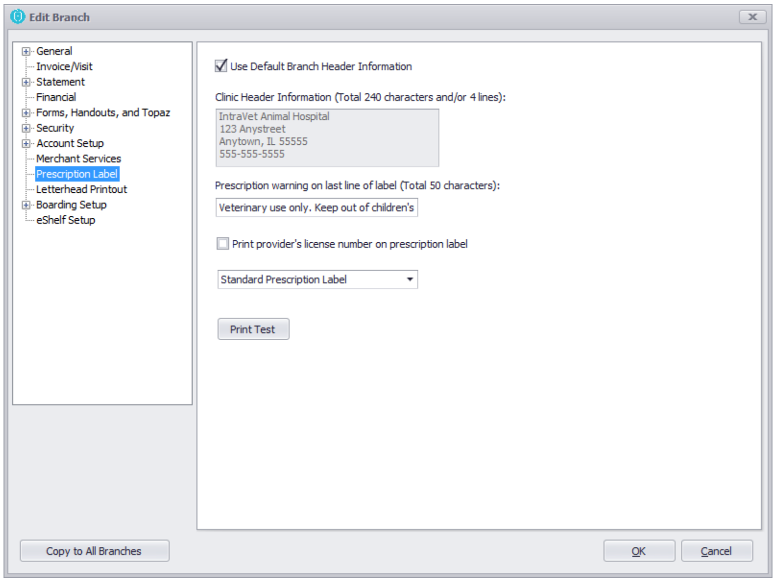
- **Customize the Prescription warning that prints at the bottom of the label.**

The Prescription warning has a 50-character limit. Letters, numbers, spaces and punctuation are included in the character count.

- **Print provider's license number on prescription label – If checked, this prints the provider's license number on the prescription labels.**
- **Prescription Label Selection – Click the down-arrow to choose from the Standard Prescription Label, the Texas Prescription Label, the Nevada Prescription Label, or the Arizona Prescription Label type.**

The Texas label and the Nevada label contain the client's address information, whereas the Standard does not.

- **Print Test – Print a Test label to verify the information entered is accurate and printing correctly.**
- **Click Copy to all Branches if all branches use the same prescription label setup.**
- **Click OK.**

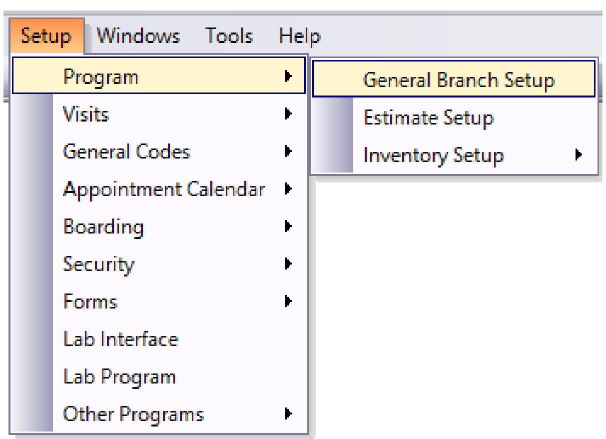


Letterhead Printout

Letterhead Printout

This section allows you to decide which type of header is preferred for different printing options within IntraVet.

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.

Select Letterhead Printout.

The different print jobs in which a different header may be chosen are listed below.

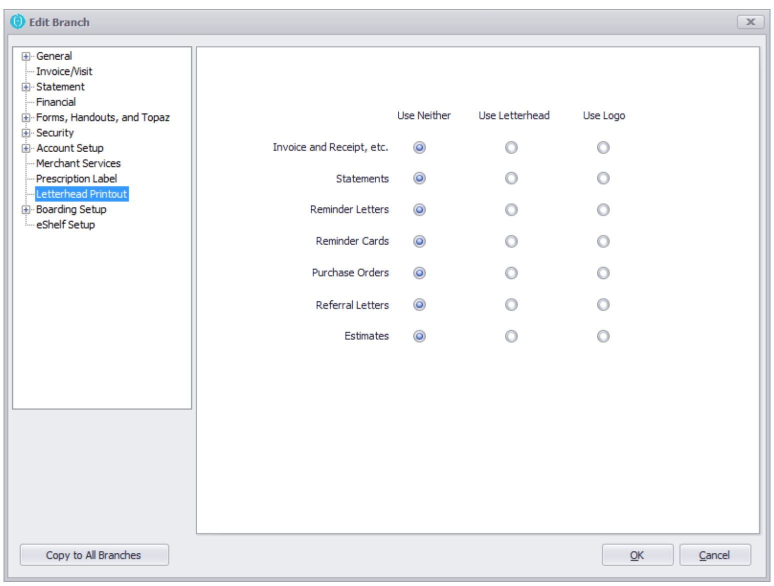
- Invoice and Receipt, etc.
- Statements

  - Reminder Letters
  - Reminder Cards
  - Purchase Orders
  - Referral Letters
  - Estimates

The options for each print job are as follows:

  - Use Neither – If the radio button is selected in this column, IntraVet applies the default header using information entered in the Name, Address, Phone and Tax section at the beginning of this chapter.
  - Use Letterhead – If the radio button is selected in this column, IntraVet does not print anything and assumes preprinted letterhead stationery has been loaded into the printer's paper tray.
  - Use Logo – If the radio button is selected in this column, IntraVet prints the logo that is saved in the Logo and Background setup.
  - Different headers or the same header may be used for different print jobs.

- Click Copy to All Branches if all branches use the same print settings.
- Click OK.



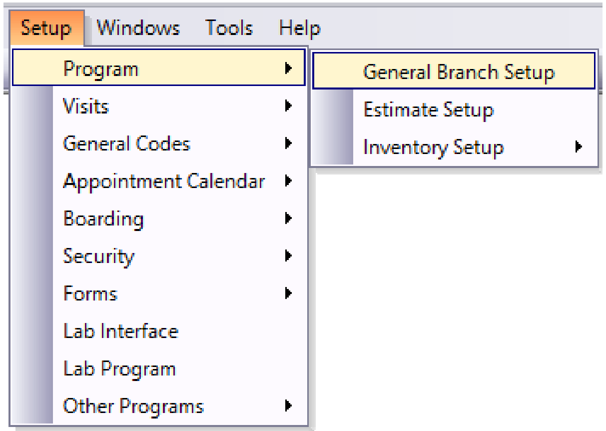
Boarding Setup

Boarding Setup

This section allows defaults to quickly, easily and consistently process a boarder's check-in, check-out, invoicing and payment.

If there are multiple branches, create an entry for each branch before selecting the defaults.

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.

Select Boarding Setup.

If you have multiple branches, either apply the defaults to all branch locations or establish different defaults for specific locations. Determine the easiest and fastest way to set up your multiple branches.

For example, you may have six branches, but their defaults are different. Perhaps two branches have ABC boarding defaults; three branches have LMN defaults, and one branch has XYZ defaults. Depending on the number of boarding differences between the branches, instead of opening the LMN and XYZ branches separately, it might be easiest to open any branch, set the defaults and select Copy to All Branches and OK to save. Then, open a branch that is different; set its defaults and choose OK, but DO NOT select Copy to All Branches again.

Some key options that you should consider when setting up boarding are:

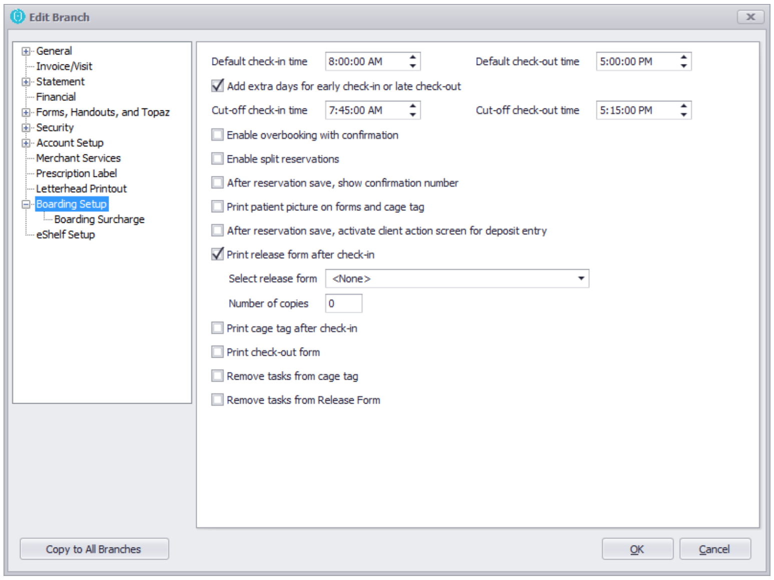
- Do you want to charge extra for early or late check-in/-out times?
- Do you want to allow overbooking or split reservations?
- Do you want a boarding charge to be sent automatically to the invoice?

- Default [check-in, check-out] time – Default times appear on all new reservations but can be edited as needed.
- Add extra days for early check-in or late check-out – Extra days are determined according to the time listed in the cut-off time field. Although they take up an extra cage (before or after reservation dates), the reservation check-in and check-out dates will remain the dates listed. When checked, this activates the cut-off check-in and check-out time. Use either the up- or down-arrow to select a time, or enter your choice.
- Cut-off [check-in, check-out] time – Any check-in time before the check-in cut-off time charges an extra day. Check-out times after the check-out cut-off time charges an extra day. Use either the up- or down-arrow to select a time, or enter your choice.
- Enable overbooking with confirmation – You may know historically how many cancellations or no-shows you will have, so more cages can be reserved than are actually

available. If checked, it is advised that no cages are available and asked if an overbooking is wanted. If overbooked, the reservation window shows a negative number in red for that cage type availability.

- Enable split reservations – Use this option when the requested cage type is not available for each day of the reservation. The boarder can be relocated to other cages for part of the stay. There will be a prompt to split the reservation since that cage is not available for the duration of the stay.
    - It is recommended that you enter cage types from largest to smallest.
- After reservation save, show confirmation number – If checked, a unique number for that reservation is displayed. The confirmation number shows up on several boarding reports and on the Existing Reservation Window, whether or not they have this option checked. We recommend providing the client with a confirmation number so there is less chance of an error occurring at check-in, and to provide a quick method to locate the boarder in the system.
- Print patient picture on forms and cage tag – Including a boarder (patient) photo is a beneficial safety feature to ensure that the correct boarder is removed from and returned to its cage or moved to a different cage type and accurately recorded on daily cage check log books.
- After saving the reservation, activate client action screen for deposit entry – For a quick, smooth workflow, access the deposit entry screen without leaving the reservation form. The Client Account Management window opens, so you can add a deposit or check client/patient information after a reservation is saved.
- Print release form after check-in – Some practices provide the check-in information to the client for reference, and to store in the boarder's hardcopy file, if one is used. If this box is checked it activates the option to Select a release form and the number of copies.
- Select release form – A release form includes: Client/Patient information, check-in/-out dates and times, cage number, instructions, services, patient notes, patient picture (if the box above is checked to print patient picture on forms) a boarding estimate, a services estimate, standard text and total estimate amount. Most facilities use multiple release forms. To select the form, use the down-arrow.
- Number of copies – The default is zero (0) copies. Enter the desired number. Some practices print two copies: one for the client to take home and the other to store in the patient (boarder's) hardcopy file.
- Print cage tag after check-in – Printing the cage tag at check-in saves searching to locate the account later. The tag shows the boarder's name/information, check-in/-out dates, cage type, cage number, instructions, patient notes and the boarder's picture.
- Print check-out form – It is customary to provide the client with the boarder's general information, instructions, services, tasks and activities provided to the boarder and any reminder notices.
- Remove tasks from cage tag – Any tasks entered for a boarding reservation will not print on the cage tag.

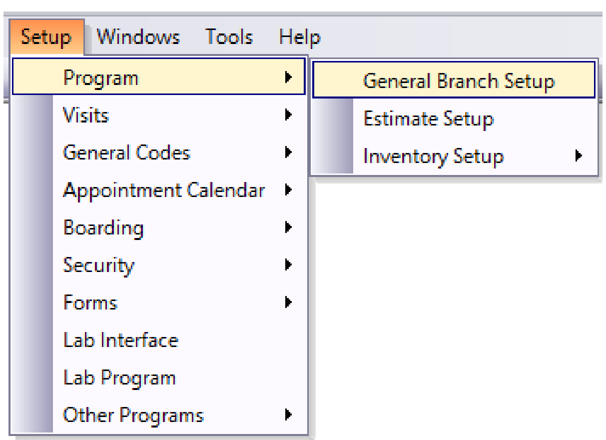
- Remove tasks from Release Form – Any tasks entered for a boarding reservation will not print on the release form.



Boarding Surcharge

Including a surcharge in a reservation fee is typically done when the boarder is staying over a holiday or weekend, for example. Some practices charge a holiday and a weekend surcharge if the holiday falls on a weekend. IntraVet checks the reservation date against the default dates determined in General Branch Setup.

- From the IntraVet Menu Bar, select Setup | Program | General Branch Setup.



- From the Branch List screen, highlight the Branch and select the Edit button at the bottom of the screen, or double-click the Branch.

Select the plus sign (+) in front of Boarding Setup.

Select Boarding Surcharge.

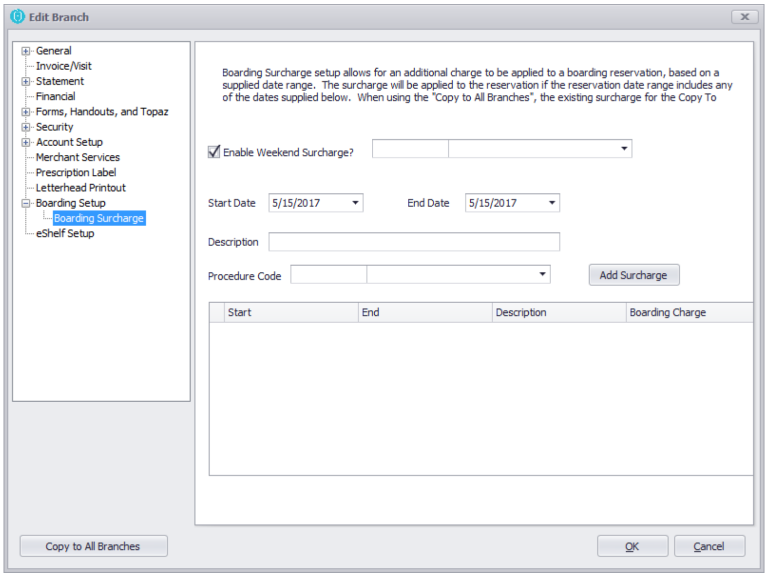
Enable Weekend Surcharge? – When checked, the client will automatically have a surcharge added to the reservation total when the reservation check-in and check-out dates are scheduled on any part of a weekend.

The check also enables a blank entry line where a procedure code or description can be entered to apply as the weekend surcharge. Enter a code or the first few letters of a description to locate the option.

The procedure code can be set up under Setup | General Codes | Procedure Codes.
To set up a new Surcharge, enter the following information and click ADD.

- Start Date – Use the down-arrow to select a beginning date from the calendar, or Enter a date using the format MM/DD/YYYY.
- End Date – Use the down-arrow to select an ending date from the calendar, or enter a date using the format MM/DD/YYYY.

  98 different date ranges can be added as Surcharge codes (Thanksgiving, Christmas, Spring Break, etc.).
- Description – Use a description to identify the Surcharge. The description should clearly identify the holiday or purpose for the date range of the Surcharge.
- Procedure Code – Select a procedure code to charge for the assigned date range. The procedure code can be set up under Setup | General Codes | Procedure Codes.
- To edit or remove the code and description after it is in the grid, right-select the item and select either Edit or Delete.
- Once a description is entered and a procedure code is selected you can click the Add Surcharge button to allow for an additional charge to be applied to a boarding reservation.
- If there is more than one branch, the surcharges can be saved to all the branches. Click Copy to All Branches in the lower left corner.
- When all the surcharge additions have been created, click OK.

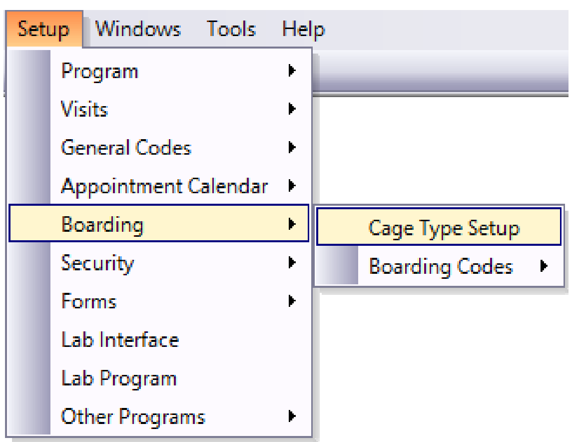


Cage Type Setup

Cage codes and descriptions must be set up as well as codes and descriptions for cages that will accommodate more than one patient prior to saving reservations. These codes and descriptions are necessary to make a reservation.

How to set up Cage Types

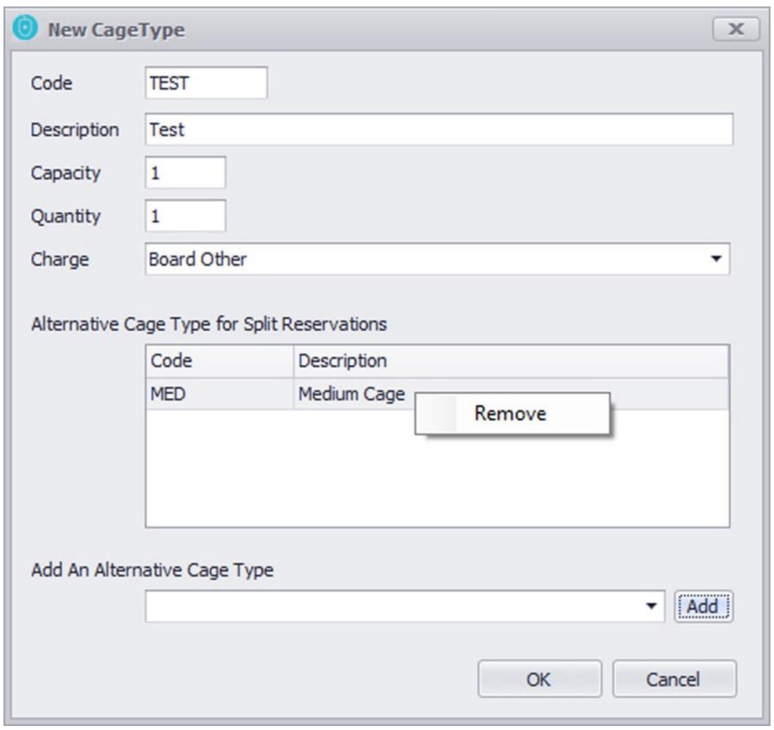
- **From the IntraVet Menu Bar, select Setup | Boarding | Cage Type Setup.**



- **Click New to create new Cage Type codes and descriptions.**
- **After the coding system has been determined, enter the Code. If adding to existing codes, it is best to follow the coding convention already established.**
- **Add a short Description for the code.**
- **Capacity – Determine how many patients the cage can accommodate together.**
- **Quantity – Determine how many cages of that type are available.**

- Charge – If a charge code is assigned to a cage type, it defaults to that charge code when creating a reservation for that cage type. However, the charge code can always be changed during the reservation. This code can be set up under Setup | General Codes | Procedure Codes.
- Add an Alternative cage type for split reservations – Use the blank entry line at the bottom of the window to locate a Cage Type Code to be used as an alternative cage type for the Cage Type that is being added. (Multiple cage types will need to be set up first and then, go back through them to add this option. *Also*, this section needs to be filled out only *if* there will be Split Reservations enabled in the Boarding Setup under General Branch Setup).

  Type the first few characters into the field. While the mouse cursor is inside a field, select Enter on the keyboard to move the selection into the grid.
- If the wrong cage type is chosen or needs to be changed, right-click the cage type and select Remove.



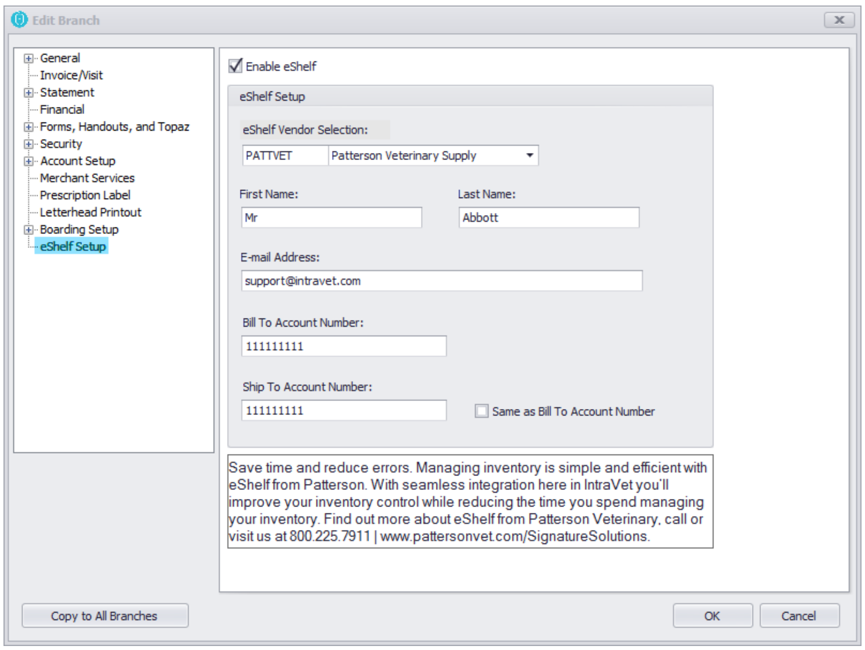
- Click OK when complete.
- Click the New button at the bottom of the window to add another Cage Type code and description.
- To revise either the Code or Description of an existing Cage Type code, select to highlight, and then click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a code/description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate).

NOTE: If a cage type is inactivated it deletes ALL reservations assigned to that cage type.

eShelf

IntraVet includes an option for eShelf, an inventory ordering integration.

- To enable this option, go to Setup | Program | General Branch Setup, select your branch and click the Edit button. Select eShelf Setup to display the eShelf configuration window.



- To enable eShelf and the settings options, select the checkbox Enable eShelf. After this box is checked, enter your eShelf options:

  a) eShelf Vendor Selection: Select your Patterson Veterinary Vendor Code.
  b) First Name: First Name of the contact person that will answer any questions regarding the purchase order.
  c) Last Name: Last Name of the contact person that will answer any questions regarding the purchase order.

  d) E-mail Address: Email Address the purchase order receipts will be sent to.

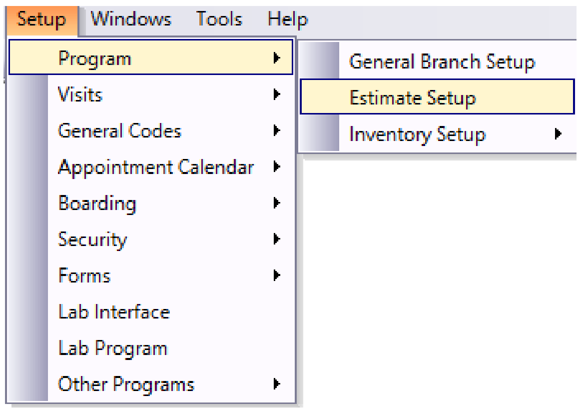
  e) Bill To Account Number: The Patterson Veterinary Account number the purchase order will be billed to.
  f) Ship To Account Number: The Patterson Veterinary Account Number the purchase order will be shipped to. If this number is the same as the Bill To Account Number, you can check the box for Same as Bill To Account Number.
  g) Click OK to save your changes.

h) (Refer to the Inventory section on how to use eShelf.)

Estimate Setup

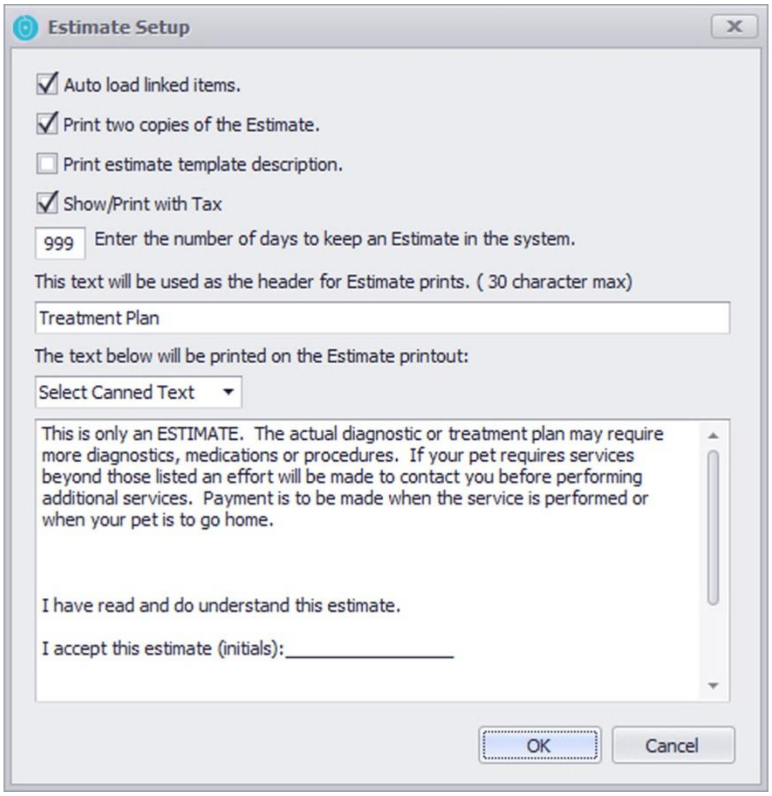
Estimate Setup

- From the IntraVet Menu Bar, select Setup | Program | Estimate Setup.



The four checkboxes enable automatic actions that will be applied when a Visit Estimate Template is loaded into a visit.

- Select or deselect the options that best suit the branch. For example, Auto load linked items will save time because there will be no need to manually load items that are already linked.
- Select the checkbox if you want to print 2 copies of the Estimate.
- Select the checkbox if you want to print the description of the Estimate Template.
- Select the checkbox if you want to Show or Print Tax on the patient's Estimate.
- Specify an Estimate amount of days before it is removed from that patient's account.
- Enter the preferred estimate header such as "Treatment Plan" or "Estimation of Charges", etc. (There is a 30-character limit. Character count includes letters, numbers, spaces and punctuation.)



- **Enter text that will be printed on the bottom of all estimates. This message can include treatment disclaimer, treatment authorization, payment agreement, etc.**
- **Canned text can be used to insert pre-configured text. Click Select Canned Text. Select from the available options.**
- **Click OK.**

General Codes Setup

Establishing a uniform code system is important for the efficient operation of IntraVet. Codes make data entry easy and accurate. All codes in the IntraVet software are user-definable and may be alpha and/or numeric. Choose numeric codes, alpha codes or create alpha numeric combinations. IntraVet has a limit of 8 characters per code and 40 characters for code description.

General Codes

Establish a code system for your practice using the following steps.

Client Setup

Client Classification Codes – Create, Edit or Inactivate

Client classification codes are used to define the financial status of a client. These classifications may be used to designate a status of "collections," "cash only," "no checks," etc.

After a classification code is defined and assigned to a client, certain classification codes may be included or excluded while running accounts receivable reports and statements. Classification codes can also be used in Recall Generator as a search criterion. Refer to the Communications chapter for information about Recall Generator.

- From the IntraVet Menu Bar, select Setup | General Codes | Client | Classification.

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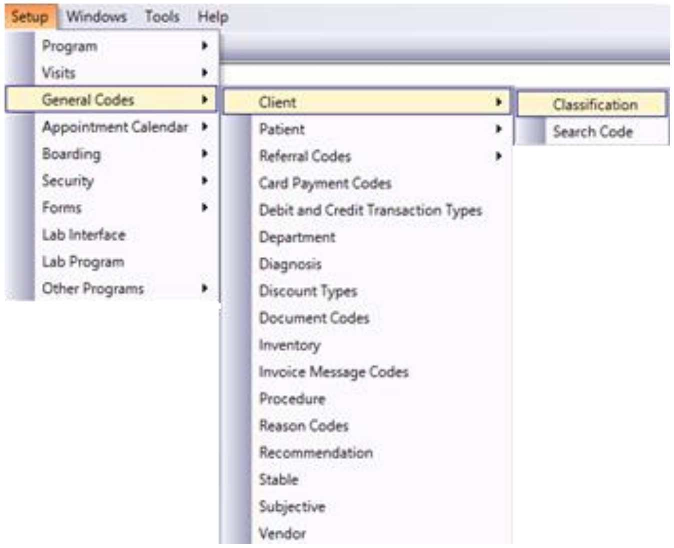
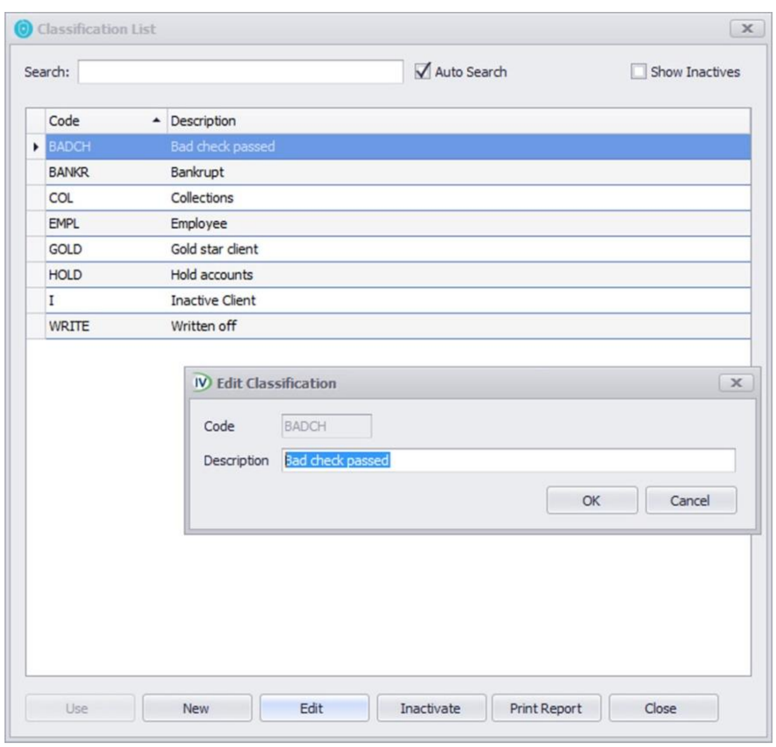


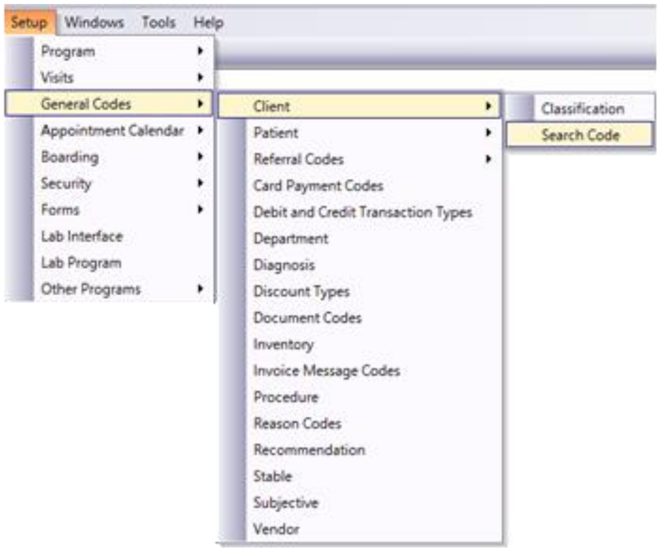
- To create a new code, click New at the bottom of the Classification List screen.
- Enter a Code.
- Enter a Description.
- Click OK.
- To revise the Description of an existing Classification code, highlight, and select Edit at the bottom of the screen.
- When you are finished, click OK.
- To inactivate a Code/Description, highlight the code and select Inactivate. (A second chance warning will appear asking to confirm the decision to Inactivate.)



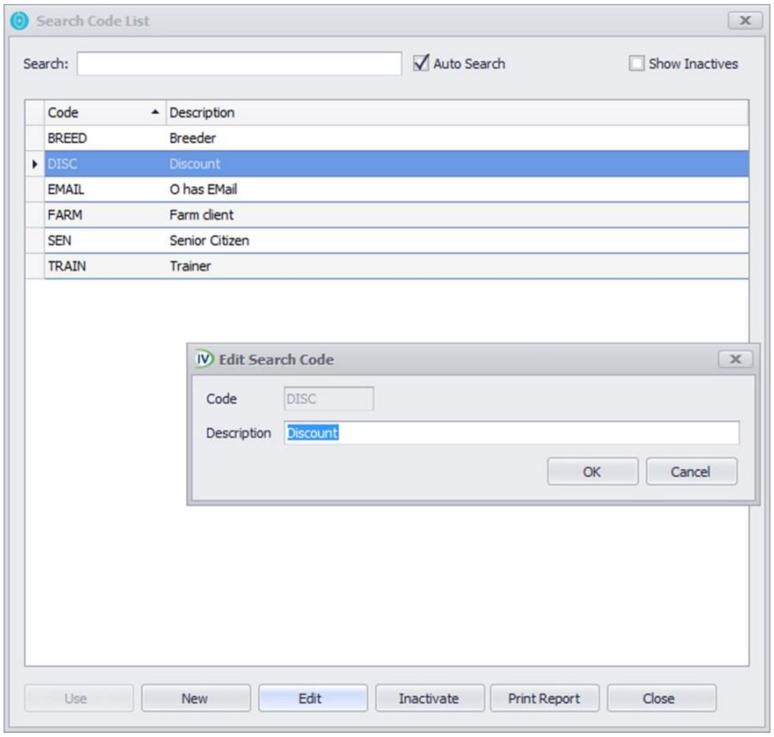
Client Search Codes – Create, Edit or Inactivate

Search codes help to further define clientele. Each client may have up to two search codes. These codes may be used as search criteria in Recall Generator. Some examples include in "Boarding Client," "Grooming Client," "4-H Member," "Puppy Kindergarten," etc. Refer to the Communications chapter for information about Recall Generator.

- From the IntraVet Menu Bar, select Setup | General Codes | Client | Search Code.



- To create a new Search Code, click New at the bottom of the Search Code List screen.
- Enter a Code.
- Enter a Description.
- Click OK.
- To revise the Description of an existing Search Code, click once to highlight the desired code and click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight and select Inactivate. (A second chance warning will appear asking to confirm the decision to Inactivate.)

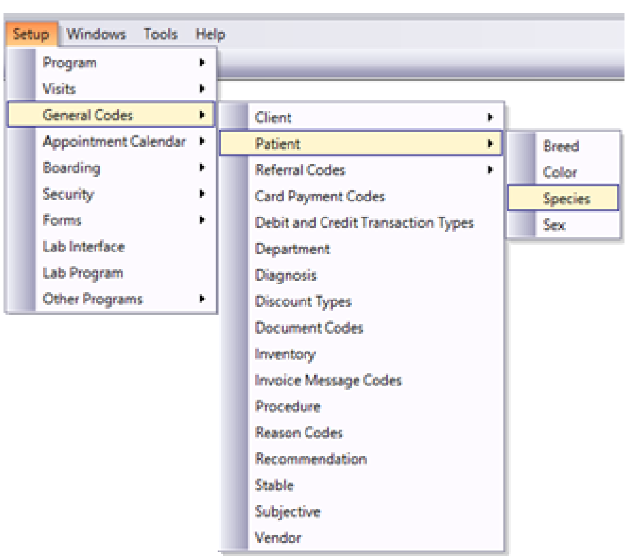


Patient Setup

Patient Species Codes – Create, Edit or Inactivate

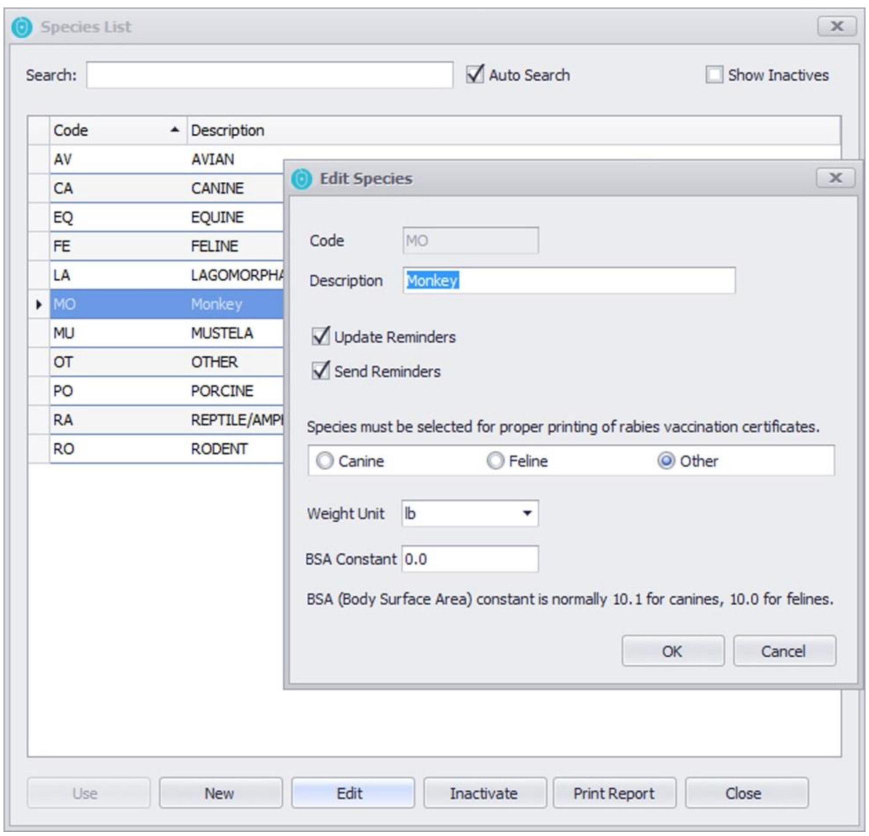
Species codes should be created for every species the practice will be treating. Create a species of "other" for that unusual patient. Species codes are a two-character code that is unique for each species. Species codes allow for selecting a specific Weight Unit for each species so that weights may be entered by pounds, ounces, pounds and ounces, kilograms or grams. Species codes can also be used in Recall Generator as a search criterion. Refer to the Communications chapter for information about Recall Generator.

- From the IntraVet Menu Bar, select Setup | General Codes | Patient | Species.



- To create a new Species code, click New at the bottom of the Species List screen.

- Enter a Code.
- Enter a Description.
- Update Reminders and Send reminders are checked by default. Uncheck either to not update and/or send reminders.
- Click in a radio option to choose a species if a rabies vaccination certificate is needed.
- Select the down-arrow to select a Weight Unit.
- Enter the Body Surface Area (BSA). (optional)
- Click OK.
- To revise the Description of an existing Species Code, click once to highlight the desired code, and then click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, click once to highlight the desired code, and then click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)

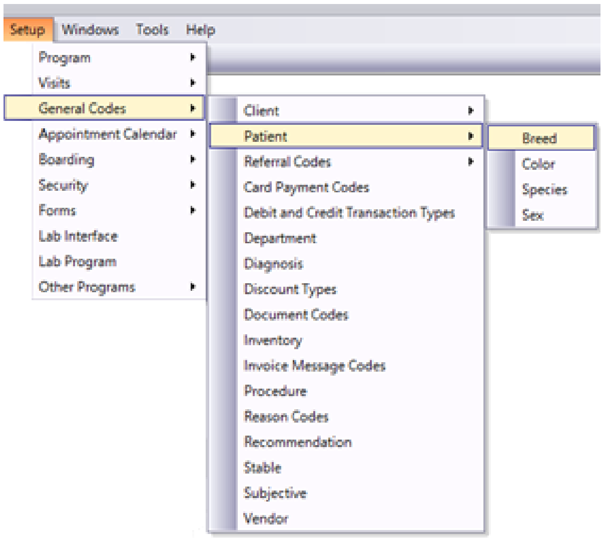


Patient Breed Codes – Create, Edit or Inactivate

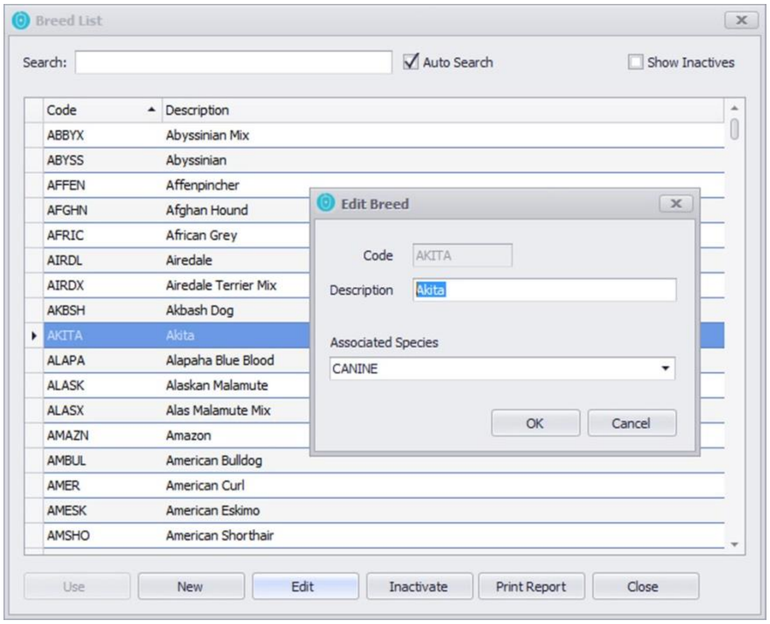
Breed codes help make consistent entries and allow searches to find all patients of a certain breed. Breed codes can be created for purebred breeds or combination/designer breeds. The breed prints on patient history, patient check-in and invoices. Breed codes can be used in Recall

Generator as a search criterion. Refer to the chapter Communications for information about Recall Generator.

- From the IntraVet Menu Bar, select Setup | General Codes | Patient | Breed.



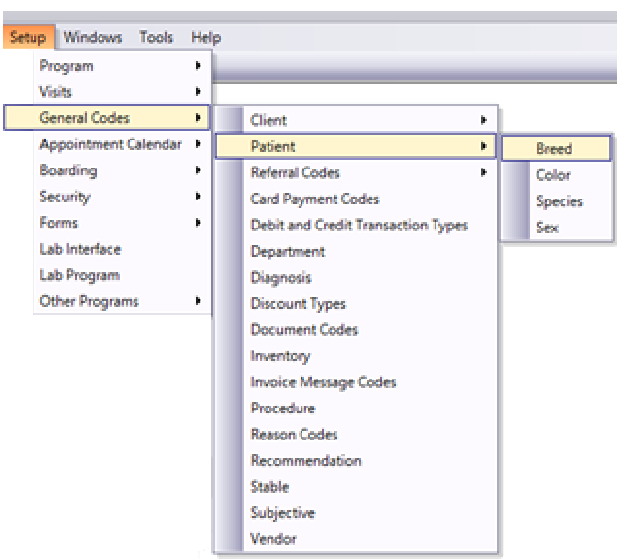
- To create a new Breed code, click New at the bottom of the Breed List screen.
- Enter a Code.
- Enter a Description.
- Select an Associated Species from the drop-down list.
- Click OK.
- To revise the Description of an existing Breed Code, highlight the desired code and click Edit at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click Inactivate at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)



Patient Color Codes – Create, Edit or Inactivate

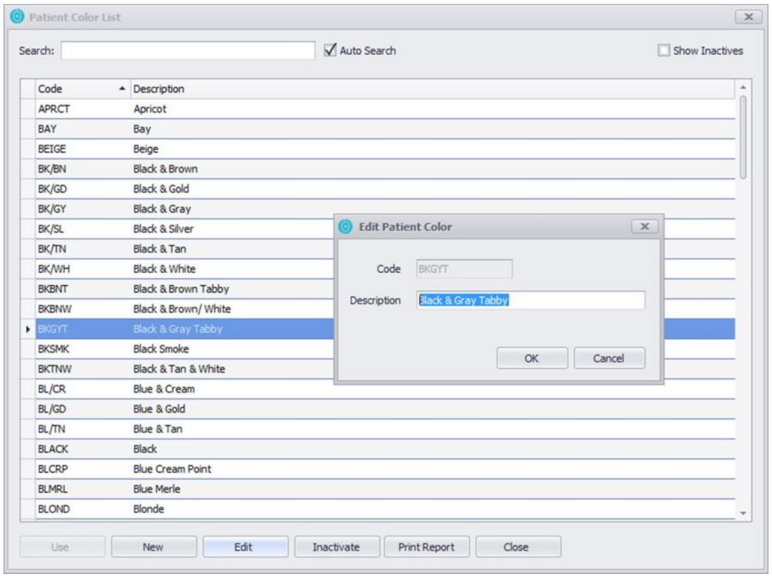
Color codes are used to further define a patient's identification. It is recommended to add additional color markings for animals that are frequently treated. Color codes are also used to indicate markings on equine patients. Color codes can be used in Recall Generator as a search criterion. Refer to the chapter Communications for information about Recall Generator.

- From the IntraVet Menu Bar, select Setup | General Codes | Patient | Color.



- To create a new Color code, click New at the bottom of the Patient Color List screen.
- Enter a Code.
- Enter a Description.
- Click OK.
- To revise the Description of an existing Color Code, highlight the desired code and click Edit at the bottom of the screen.

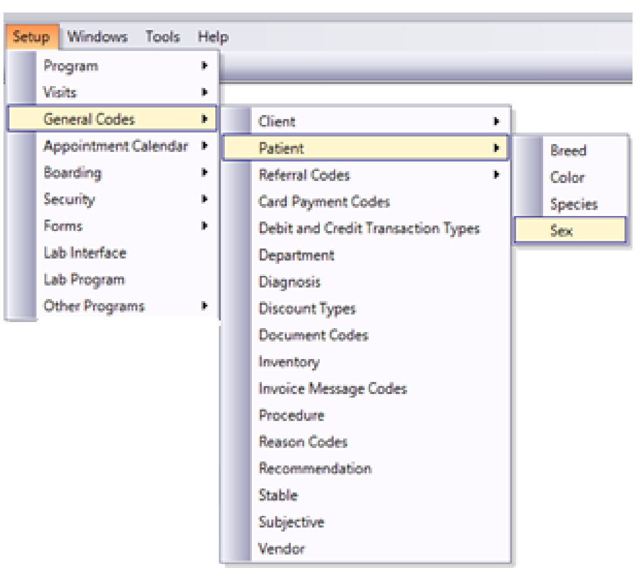
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click Inactivate at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)



Patient Sex Codes – Create or Edit

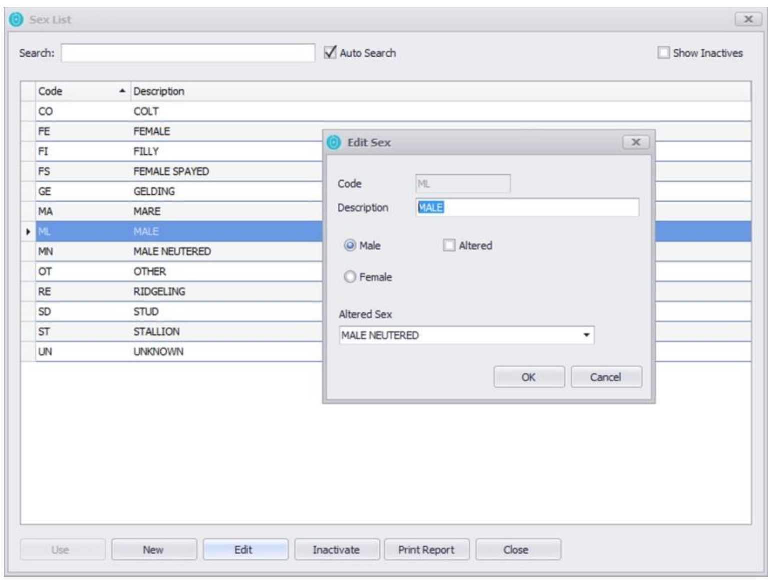
Sex codes can be created for any gender description the practice treats. The altered sex can be defined and the adult sex for each code that is created. This allows the program to change the sex of a patient when a code is invoiced that prompts a change in sex. Sex codes can also be used in Recall Generator as a search criterion. Refer to the chapter Communications for information about Recall Generator.

- From the IntraVet Menu Bar, select Setup | General Codes | Patient | Sex.



- To create a new Sex code, click New at the bottom of the Sex List screen.

- Enter a Code.
- Enter a Description.
- Click the appropriate radio button for the patient's sex. If checked, the altered box does not allow for an alternative sex to be selected below – that code is already altered. For example, a Female Spayed code would be checked as Altered; a Female code would be selected as female and have an altered sex of Female Spayed.
- Click in the Altered Sex blank entry lines and choose the desired Code/Description or use the down-arrow.
- Click OK.
- To revise the Description of an existing Sex Code, click once to highlight the desired code and, and then click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.



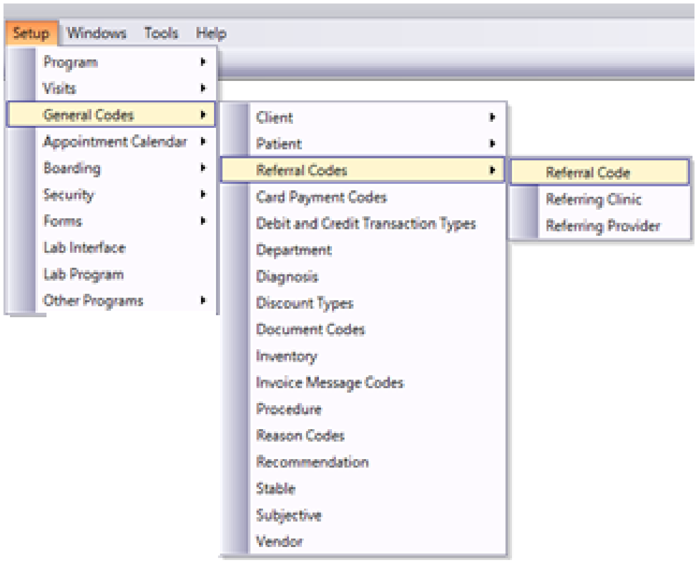
Referral Codes

Referral Codes – Create, Edit or Inactivate

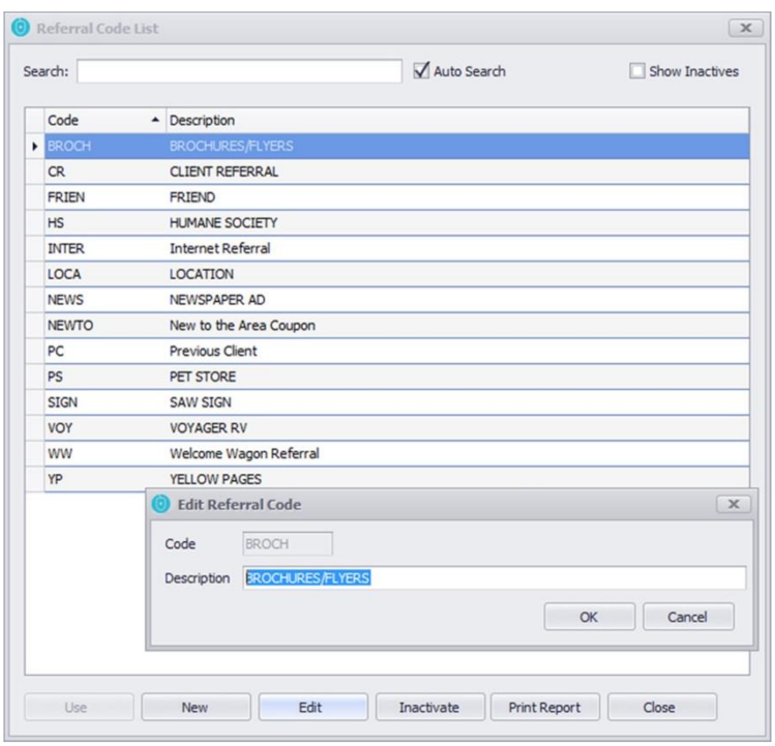
Referral codes can be used to track the effectiveness of the practice's public relations efforts. These codes are used to link each client with a code that indicates how he/she found out about the practice. Some commonly entered codes are Website, Newspaper and Yellow Pages. If other means of advertising are used for the practice, enter these as referral codes.

Periodically run the Client Referral Report to monitor the number of clients for each referral code and the year-to-date total sales for each referral code. (This report pulls the date from when the client was entered into the system. It does not pull from when the referral was added to the Client.)

- From the IntraVet Menu Bar, select Setup | General Codes | Referral Codes | Referral Code.



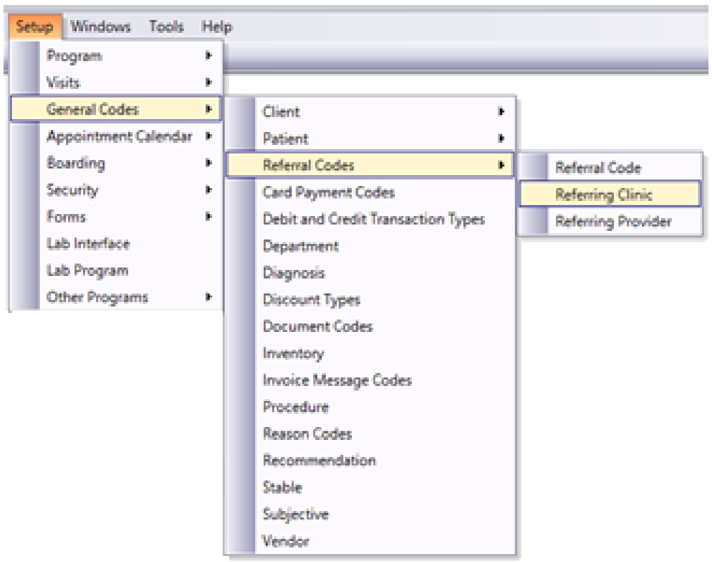
- To create a new Referral code, click New at the bottom of the Referral Code List screen.
- Enter a Code.
- Enter a Description.
- Click OK.
- To revise the Description of an existing Referral Code, highlight the code and click Edit at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)



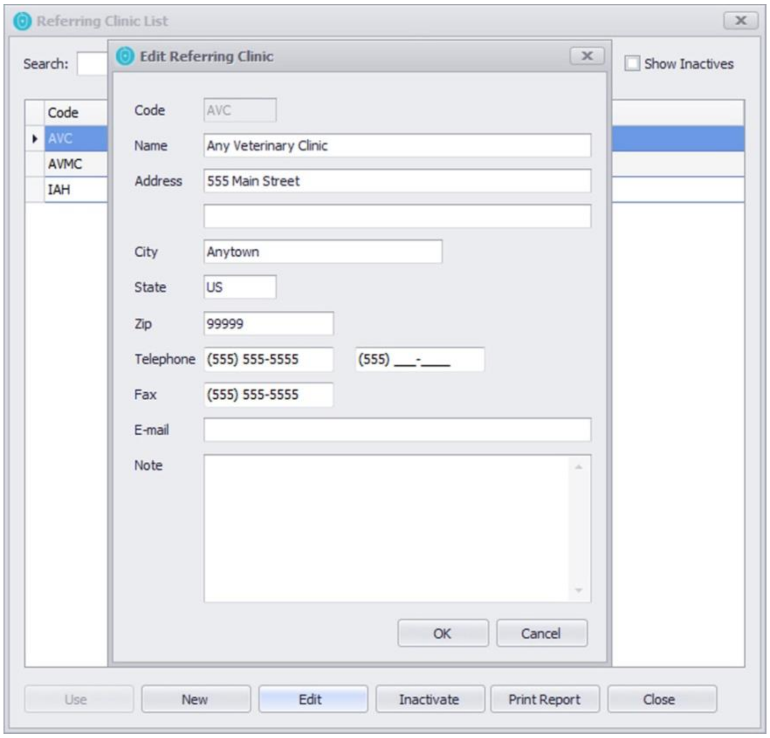
Referring Clinic Codes – Create, Edit or Inactivate

Many practices like to send courtesy thank you letters to other practices when they refer a patient to them. Setting up a separate code for each referring practice allows for a quick mail merge onto a master letter.

- **From the IntraVet Menu Bar, select Setup | General Codes | Referral Code | Referring Practice.**



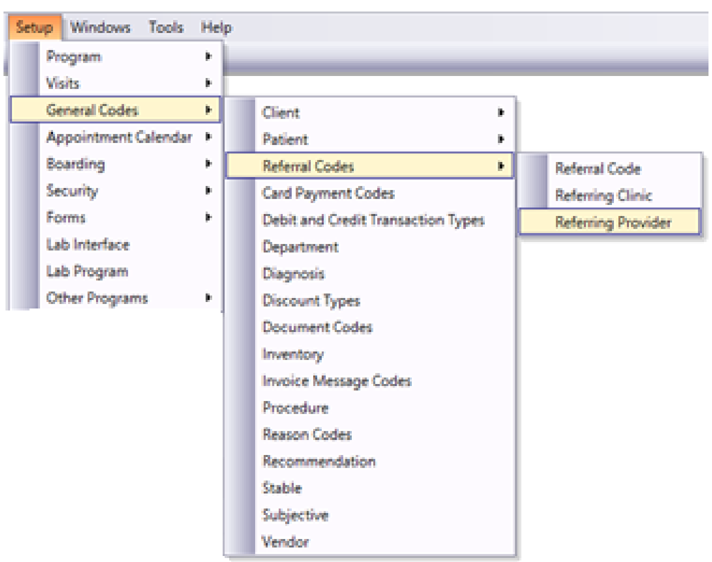
- **To create a new Referring Practice code, click New at the bottom of the Referring Practice List screen.**
- **Enter a Code.**
- **Complete the Name and Address information.**
- **Click OK.**
- **To revise any information of an existing Referring Practice Code, except the code itself, click once to highlight, and then click the Edit button at the bottom of the screen.**
- **Make the necessary changes and click OK.**
- **To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)**



Referring Provider Codes – Create, Edit or Inactivate

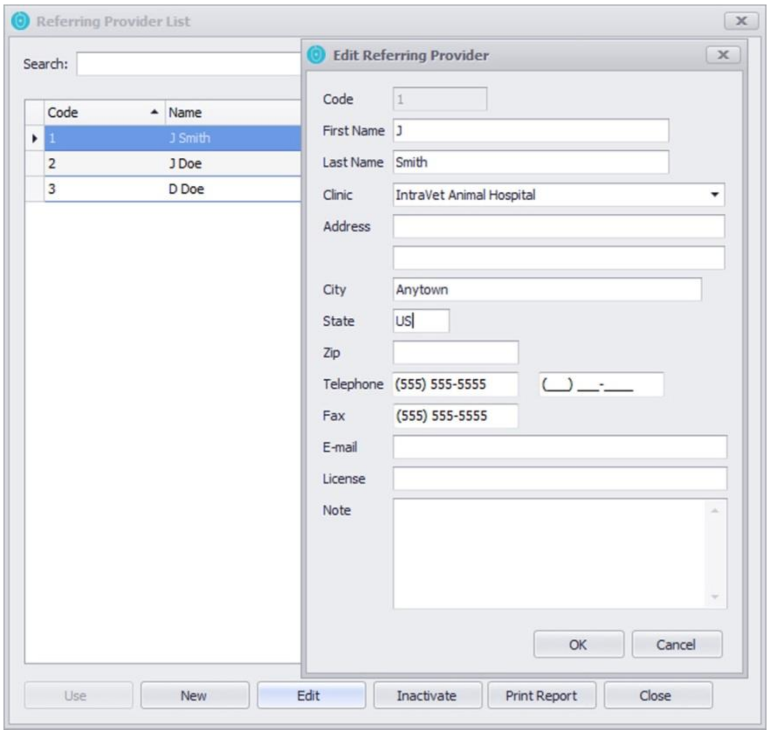
Many practices like to send courtesy thank you letters to other providers when they refer a patient to them. Setting up a separate code for each referring provider allows for a quick mail merge onto a master letter.

- From the IntraVet Menu Bar, select Setup | General Codes | Referral Code | Referring Provider.

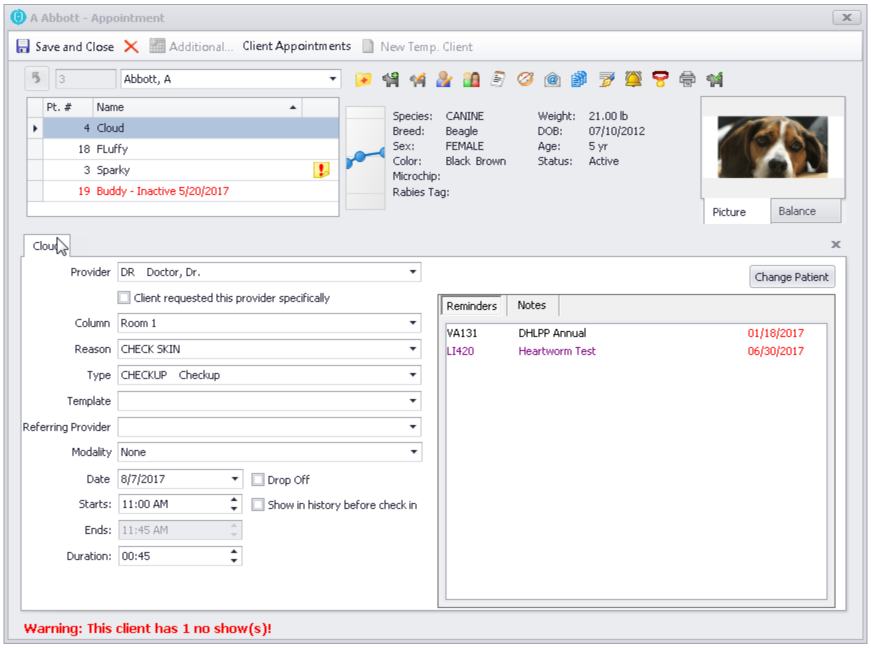


- To create a new Referring Provider code, click New at the bottom of the Referring Provider List screen.
- Enter a Code.
- Complete the Name and Address information.

- Click OK.
- To revise information of an existing Referral Provider Code, click once to highlight, and then click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)



- Once the Referring Provider has been created, you will link this provider to a patient visit and/or Appointment.



Create a Referral Letter with Merge Fields

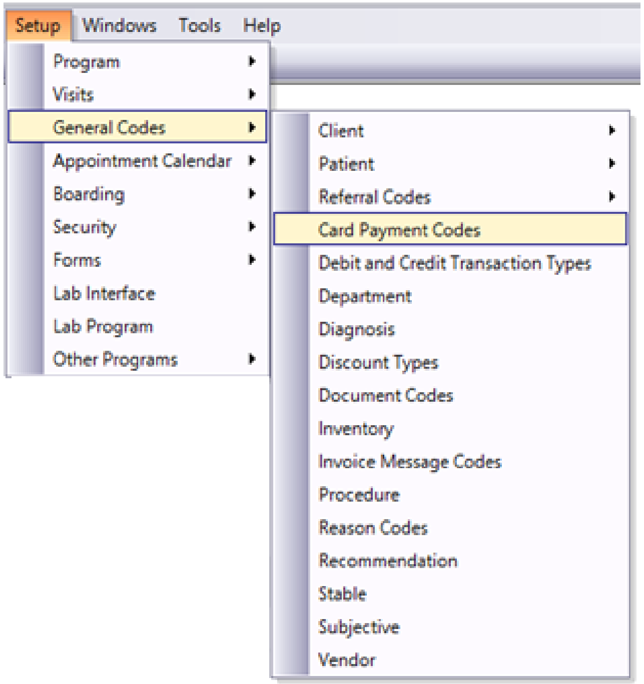
- Open the Client Account.
- Open the Patient's Medical History.
- Right-click in the Visits and select New Referral Letter.

Card Payment Codes

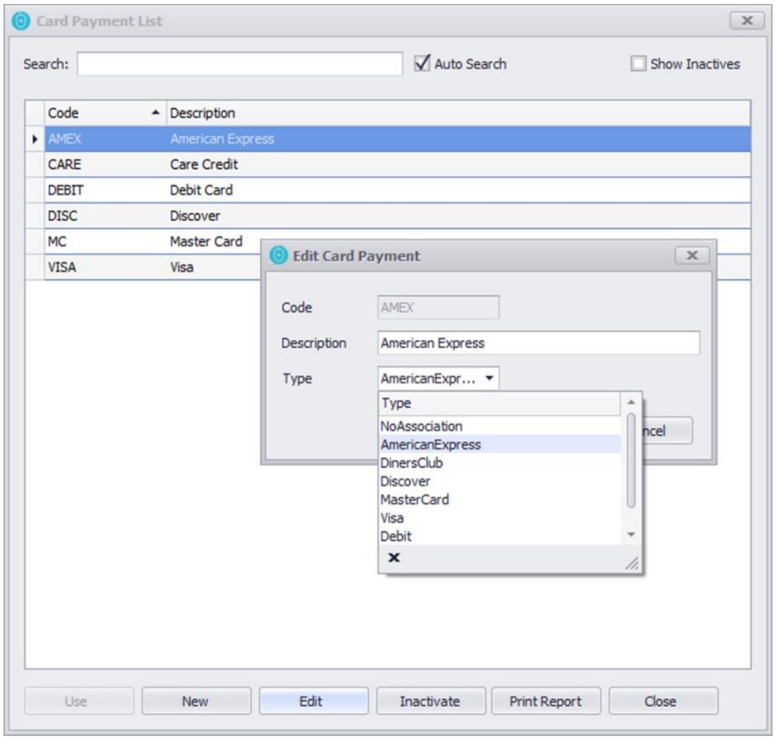
Card Payment Codes are used to keep track of different forms of payment other than cash or check. The purpose of these codes is to define payment types that will be entered on the client's transaction screen. The End-of-Day Transaction Report allows for printing totals by card payment type.

Card Payment Codes – Create, Edit or Inactivate

- From the IntraVet Menu Bar, select Setup | General Codes | Card Payment Codes.



- To create a new Card Payment code, click New at the bottom of the Card Payment List screen.
- Enter a Code.
- Enter a Description.
- To select the card type, click the down-arrow.
- Click OK.
- To revise either Description or Type of an existing Card Payment Code, click once to highlight, and then, click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)



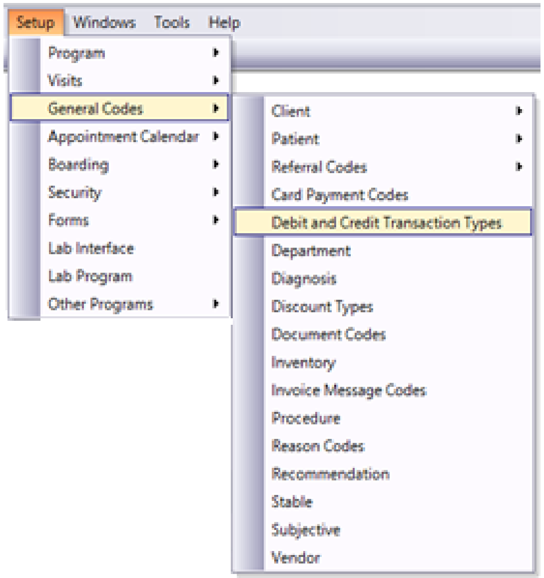
Debit and Credit Card Transaction Types

Debit and Credit Transaction Type Codes are used for adjusting account balances that do not affect services or payments.

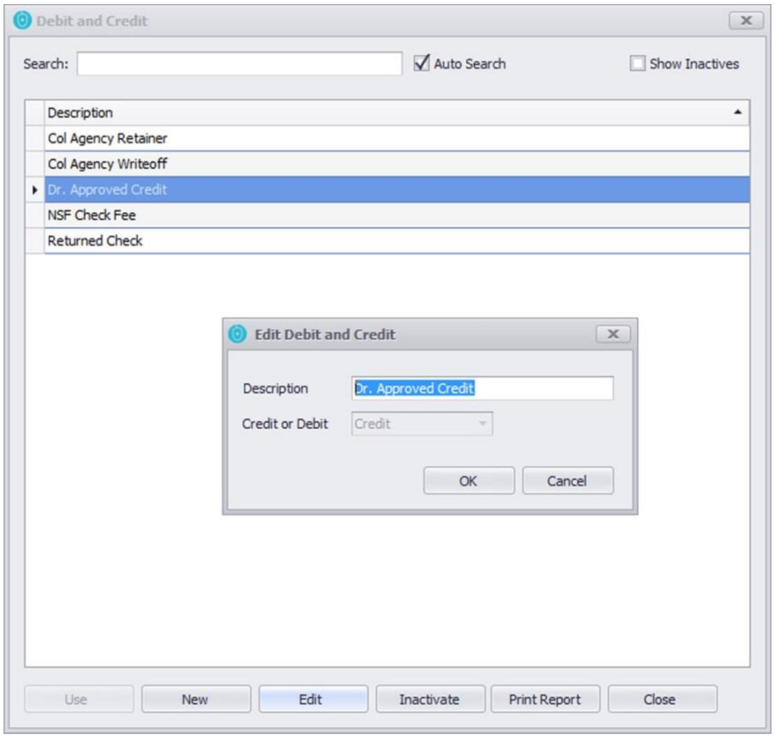
> **A debit transaction increases a client’s balance due and affects the account like a charge. Use debits for adjustments such as returned check fees.**
>
> **A credit transaction decreases the client’s balance and affects the account like a payment. Use credits for adjustments such as balance write-off.**
>
> **These codes can be defined for any specific adjustments that are frequently used.**

Debit and Credit Card Transaction Types – Create, Edit or Inactivate

From the IntraVet Menu Bar, select Setup | General Codes | Debit and Credit Transaction Types.



- To create a new Transaction Type, click New at the bottom of the Debit and Credit screen.
- Enter a Description for the new transaction type.
- Debit or Credit – Use the down-arrow or click in the blank entry line to choose either Debit or Credit.
- Click OK.
- To revise the Description of an existing Debit or Credit Code, click once to highlight, and then click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)

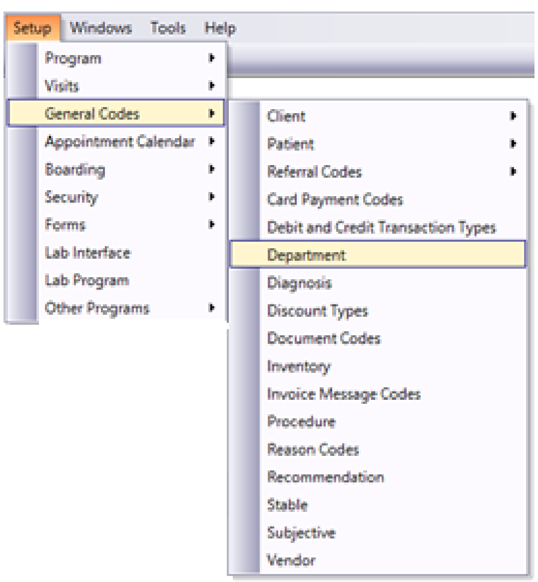


Department Codes

Department codes are mandatory for every Procedure and Inventory code. Productivity and Inventory reports can be run by department or all departments. Running the report by department gives the practice better information for making business decisions.

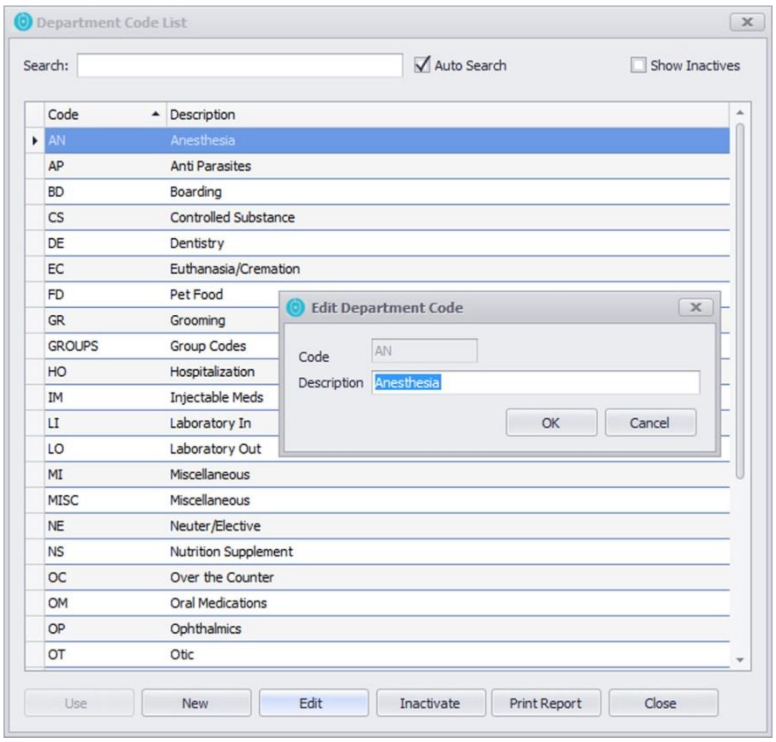
Department Codes – Create, Edit or Inactivate

- From the IntraVet Menu Bar, select Setup | General Codes | Department.



- To create a new Department code, click New at the bottom of the Department Code List screen.

- Enter a Code.
- Enter a Description.
- Click OK.
- To revise the Description of an existing Department Code, click once to highlight, and then click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)

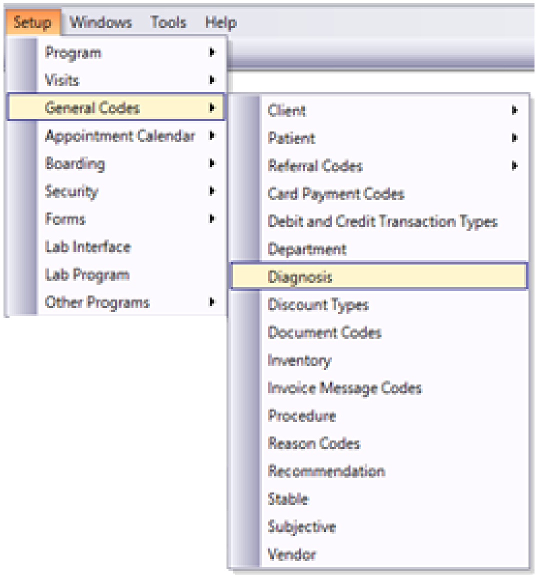


Diagnosis Code Setup

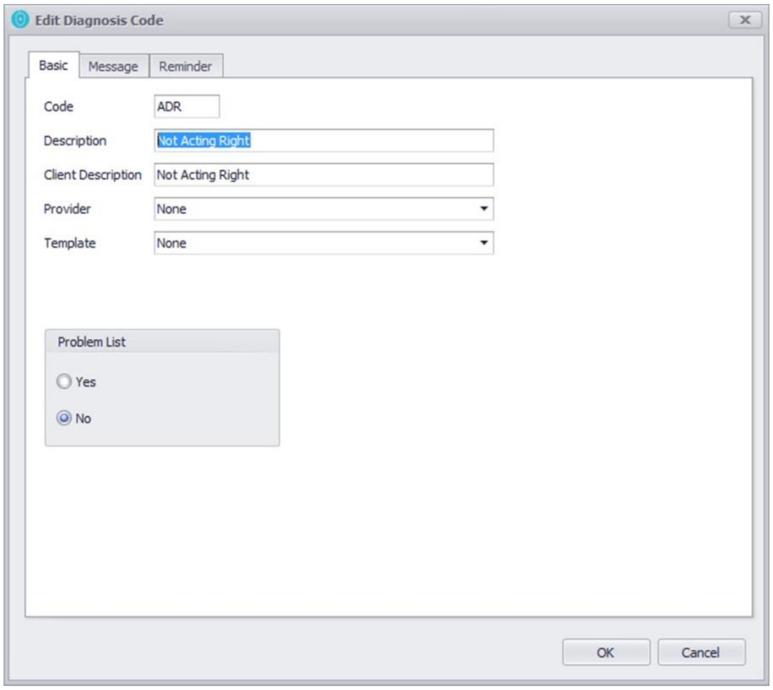
Diagnosis Codes allow for entering a diagnosis in an invoice. Patient history or visit allows you to search for patients later that have had that diagnosis.

Diagnosis Codes – Basic Tab

- From the IntraVet Menu Bar, select Setup | General Codes | Diagnosis.



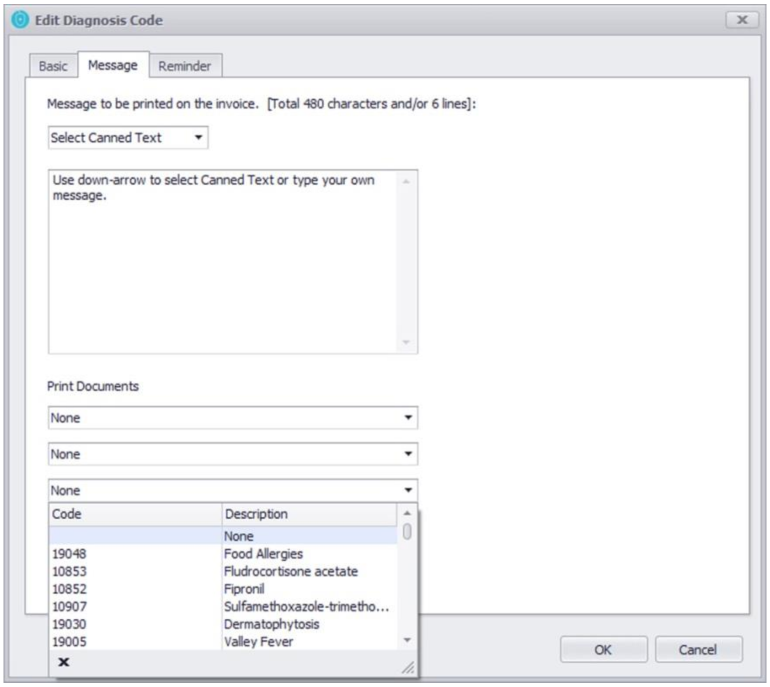
- To create a new Diagnosis code, click New at the bottom of the Diagnosis Code List screen (under the Basic tab).
- Enter a Code.
- Enter a Description.
- Enter a Client Description. Use terminology that a client will better understand. For example, the Description might be "Dental Prophy," but the Client Description would be "Dental Cleaning."
- Choose a Provider from the drop-down list (optional).
- Select a Template from the drop-down list (optional).
- To add to the Problem List automatically when this diagnosis is assigned in a Visit, click Yes, otherwise click No.
- Click OK.
- To revise information for an existing Diagnosis Code, highlight the desired code and click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)



Diagnosis Code – Message Tab

Messages on an invoice can help educate clients. Procedures often have side effects or precautions that can be printed on the invoice to help reinforce the information given to clients in the exam room.

- **Enter a message to be printed on the invoice (total 480 characters and/or 6 lines of text) and/or use Select Canned Text – prints on the invoice when this diagnosis code is entered on an invoice.**
- **Print Documents – If LifeLearn Client SA8 Handouts were purchased, some documents automatically attach when the LifeLearn installation CD is run. Any documents that have been created as client handouts (limit is 3 documents) may also be attached.**
- **To revise the Description or Message of an existing Diagnosis Code, click once to highlight, and then click the Edit button at the bottom of the screen.**
- **Make the necessary changes and click OK.**
- **To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.) See both graphics below.**



Diagnosis Code – Reminders Tab

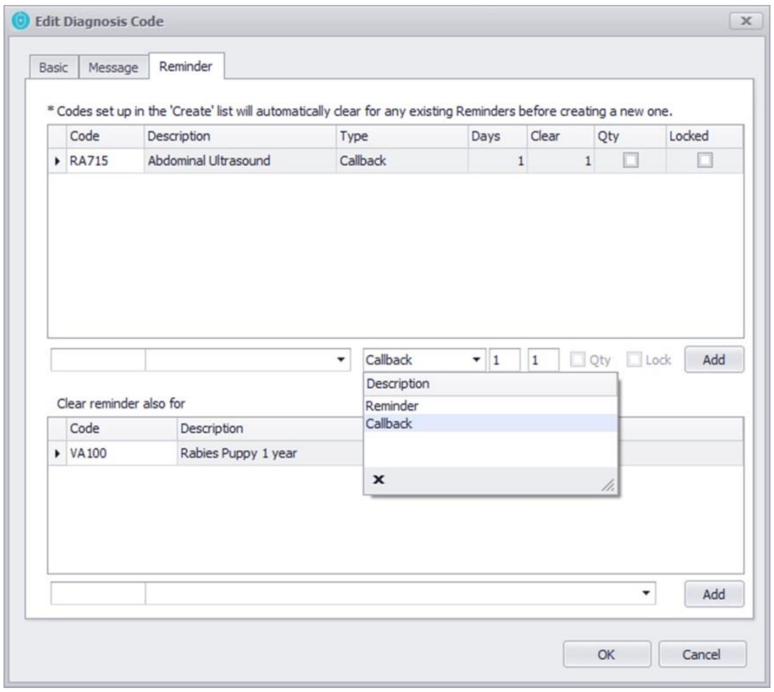
Reminder setup is important for sending reminders at regular intervals. A reminder for a diagnosis code is created like a reminder for procedure and inventory codes. A reminder can be set up as a Reminder or a Callback reminder that creates a reminder but does not clear any previous reminders.

- Select the down-arrow in the Description field and select the code/description for the reminder.
- Select the down-arrow next to Reminder and choose Reminder or Callback for this reminder.
- Enter the number of days in which the reminder will generate a due date.
- If Callback is selected, set the number of days in which it will clear.
- Click Add to set the reminder. Multiple manual reminders or callbacks can be set.
- Check the Qty box if this is a reminder in which the date needs to change based on the quantity of the code entered. This feature is used mostly with inventory items such as Heartworm or Flea & Tick preventative. If 30 is entered and Qty is checked, the reminder will be created 30 days later for every item sold, in 60 days if two are sold, in 90 days if three are sold, etc.

Clear reminder also for – When a code is selected, it will clear due reminders for the code entered below.

- Click Add. An unlimited number of related codes may be added to clear when this code is entered.
- Click OK.

- To revise either a Code or Description or Reminder Type and Due Date of an existing Code / Description / Reminder, highlight the desired code and click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)
- Click OK.

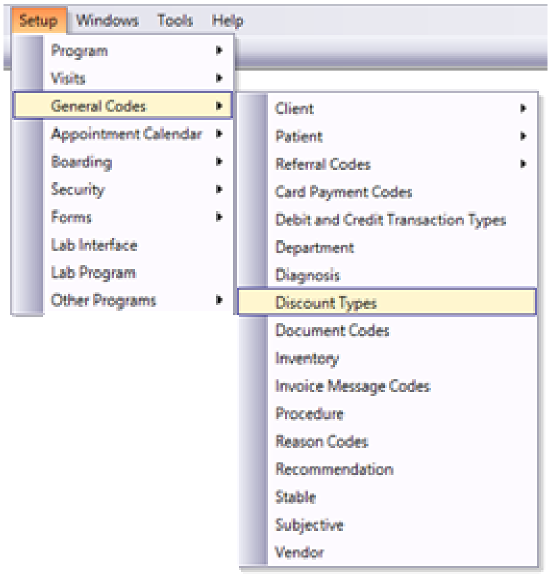


Discount Types Codes

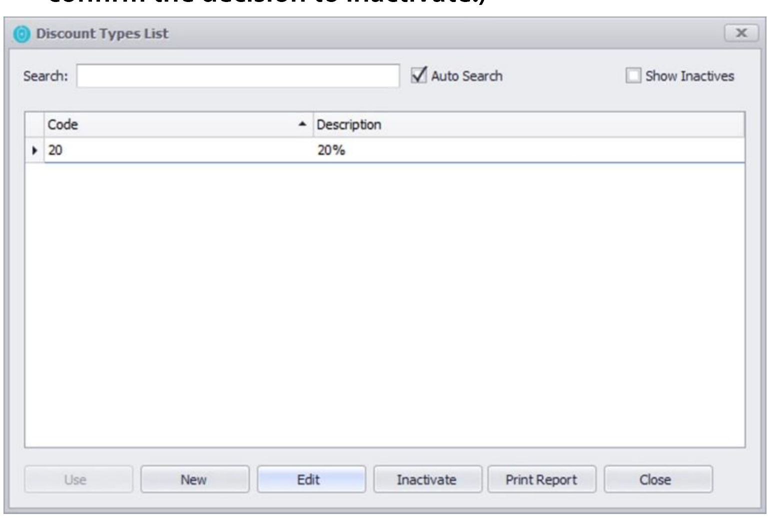
Discount types can be used to track discounts given to your clients.

Discount Types – Create, Edit or Inactivate

- From the IntraVet Menu Bar, select Setup | General Codes | Discount Types.



- To create a new Discount Type, click New at the bottom of the Discount Type List screen.
- Enter a Code.
- Enter a Description.
- Choose one of the following:
  - Use Amount – will apply a dollar amount discount.
  - Use Percent – will apply a percentage amount discount.
- Enter the amount or percent of the discount.
- Click OK.
- To revise a Discount Type, double-click the code/description in the Discount Type screen, or click once to highlight and click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)



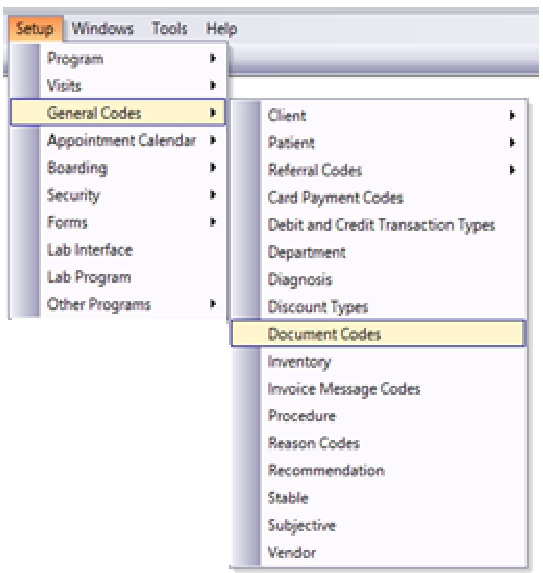
Document Codes

Document Codes are used with client handouts, health certificates, euthanasia forms and authorization forms. This includes LifeLearn Handouts that are purchased and installed as a supplement to IntraVet for educating clients about conditions, diseases, and homecare instruction. The printouts/handouts include small animal, large animal and pharmacy. The documents are usually used for paperwork that would be filled out manually (not on the computer) and either filed or given to the client.

Documents can be created inside IntraVet by using the word processing module. Once a code/description has been created, locate the file and attach to this code/description. To access a document on an account, click the Documents button on the Client Account window.

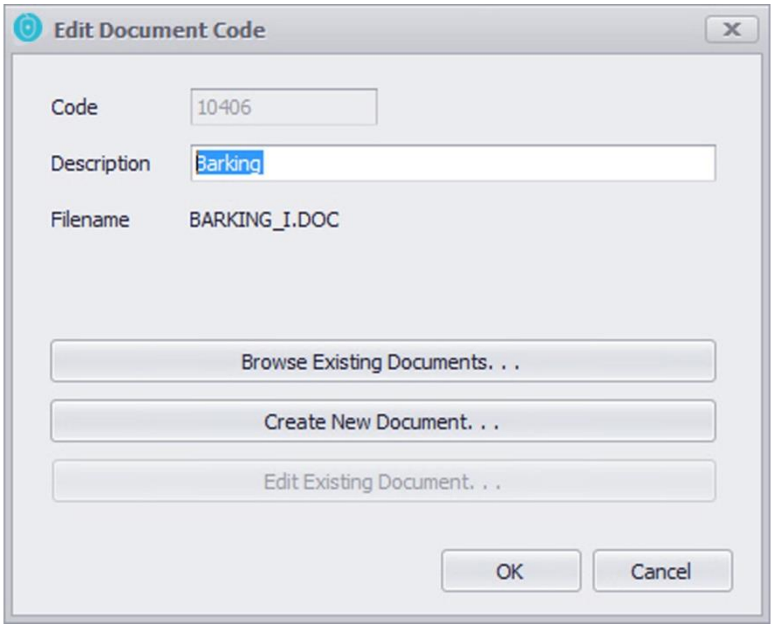
Document Codes – Create, Edit or Inactivate

- From the IntraVet Menu Bar, select Setup | General Codes | Document Codes.



- To create a new Document code, click New at the bottom of the Document Code List screen.
- Enter a Code and Description.
- If documents have already been created and saved on the local drive, select Browse Existing Documents… and navigate to its location and select it to load it.
- New documents can also be created from within IntraVet by clicking on Create New Document… and typing in the information. Save the document and name it accordingly from within the File menu of the word processing screen.
- If a document is already created but it needs revision, select the document name; then select the Edit button at the bottom of the Document Code List screen to open the file and make changes.
- Click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)

- Click OK.



LifeLearn

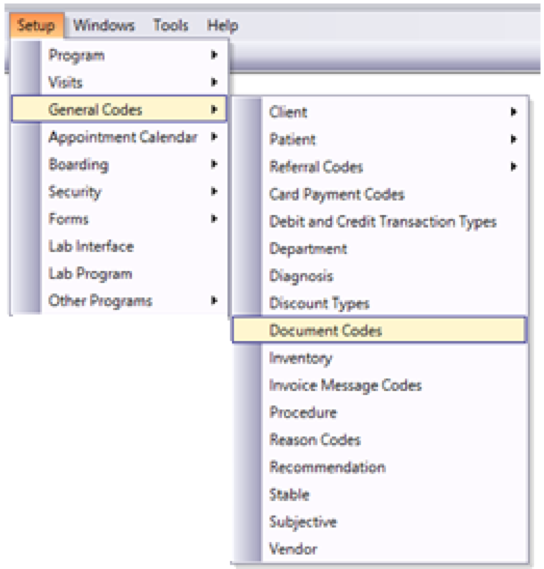
LifeLearn, a companion software package that can be added to IntraVet, provides numerous client education printouts/handouts about conditions, diseases, and homecare instruction. The printouts/handouts include small animal, large animal and pharmacy.

During a LifeLearn installation, the printouts/handouts are automatically linked to some diagnosis codes. LifeLearn printouts/handouts can also be manually linked to inventory and procedure codes.

Manually Link a LifeLearn Printout/Handout

When a LifeLearn printout/handout is linked to an IntraVet code, an automatic prompt appears to print the instruction sheet when invoicing the client.

- From the IntraVet Menu Bar, select Setup | General Codes | Document Codes.

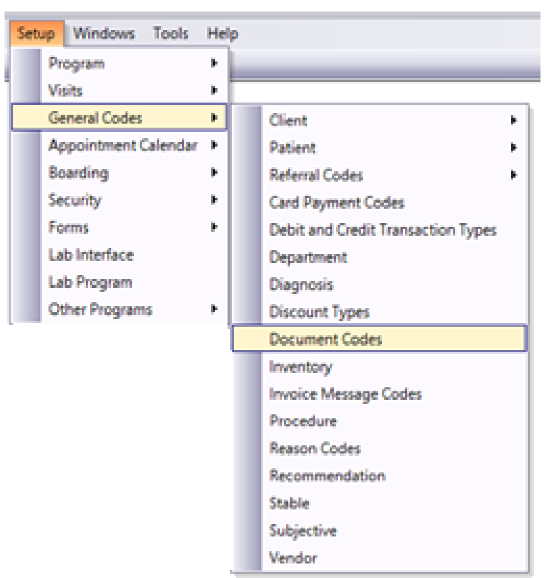


The window opens by default to the Document Code List.

- Locate the Code/Description by scrolling to your selection, and double-click on it to open. The Edit Document Code screen appears. Select Browse Existing Documents to find the LifeLearn document you want to attach to the document code.
- When you have completed, click Save.
- Click OK.

Edit a LifeLearn Printout/Handout

- From the IntraVet Menu Bar, select Setup | General Codes | Document Codes.



- Locate the Code/Description by typing an IntraVet Code or Description into the blank entry line at the top of the window. You can also scroll to your selection, and double-select it to open the Edit Document window.
- Click Edit Existing Documents to go directly to a document.

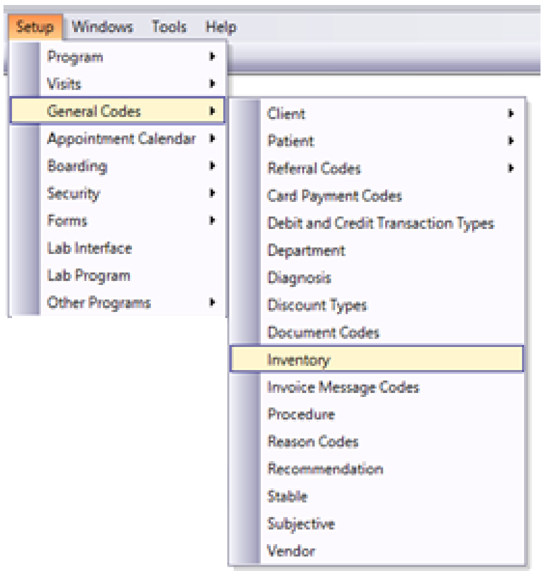
- Make your changes and save the document with the same name or a new name.
- Click OK.

Inventory Code Setup

Inventory codes are used for invoicing, documenting a history of prescribed medications, and tracking inventory usage. Create an inventory code for each item that you sell and any items for which you wish to track the usage.

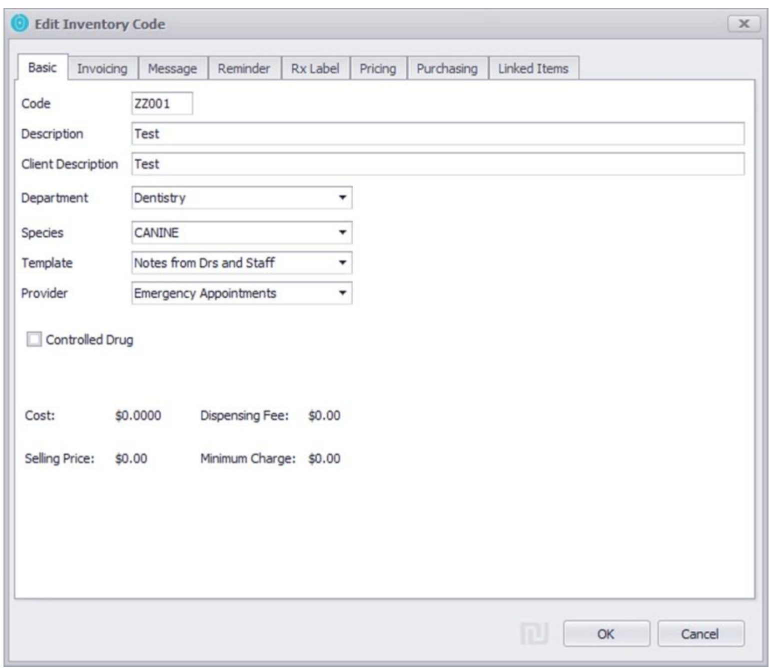
Inventory Codes – Basic

- From the IntraVet Menu Bar, select Setup | General Codes | Inventory.



- To create a new Inventory code, click New at the bottom of the Inventory Code List screen. The Inventory Code window opens the Basic tab by default.
- Enter a Code.
- Enter a Description. This description should be the terminology used in your practice.
- Client Description – The first description automatically fills in the Client Description; however, you can change the description to read differently so that it better explains the charges to your clients. For example, the Description is “Torbugesic Injection”; Client Description – “Pain Injection.” Your employees will invoice the code as Torbugesic Injection, but Pain Injection prints on the client’s invoice.
- Department – Every inventory code must be assigned to a department. This helps determine where the information for this code prints on departmental productivity reports and departmental listings.
- Species – Click to assign a specific species to your code. A message will appear if this code is invoiced under a different species. It will not prevent you from using the code on the wrong species. (This is not a required field.)
- Template – Each inventory code can be associated with a template for text so that you can make consistent medical note entries. If you have a template defined that pertains to this inventory item, enter the template code here. (This is not a required field.)

- Provider – To set this inventory code to be credited to a particular provider, enter the doctor's code. This is particularly helpful if there are lab, grooming, or technical procedures that should not report on the attending veterinarian's productivity. (This is not a required field.)
- Controlled Drug – Check this box if the item is a controlled substance. This will allow for proper documentation to the controlled substance log.
- Before saving your data, select the Pricing tab to complete the inventory setup.
- Click OK.
- To revise an Inventory Code, double-click the code/description in the Inventory Code List screen, or click once to highlight and click the Edit button at the bottom of the screen.
- Select the appropriate tab.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)



Inventory Code – Invoicing Options

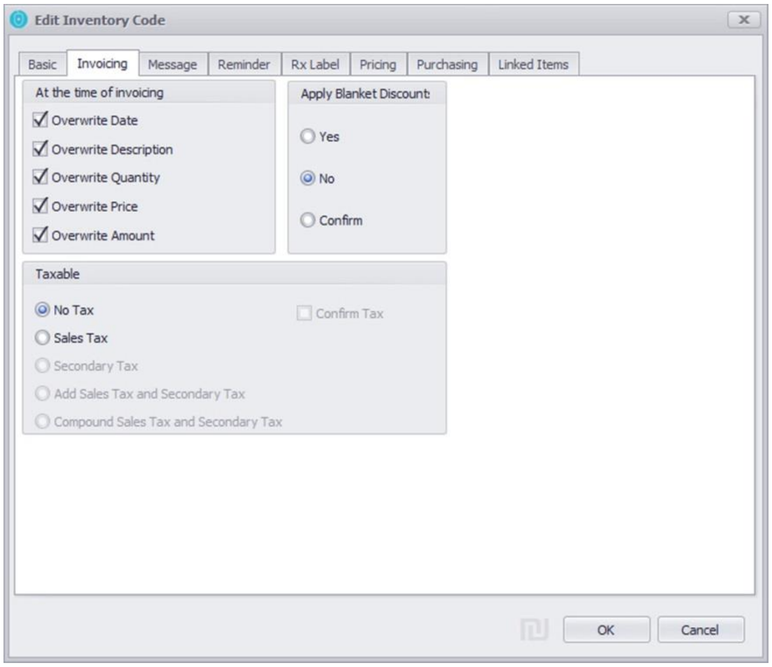
At the time of invoicing, you can overwrite data. By default, all items are checked to be able to be overwritten. Uncheck any item that you do *not* want overwritten for a particular inventory code.

- Select the Invoicing tab.

At the time of invoicing:

- Overwrite Date – Allows users to change the date on the Invoice line. This is helpful if you have a patient that has been treated over a period of time. The line items will be entered into history using the date entered on the invoice. However, the accounting date for the entire invoice will be the date on which it is permanently saved.

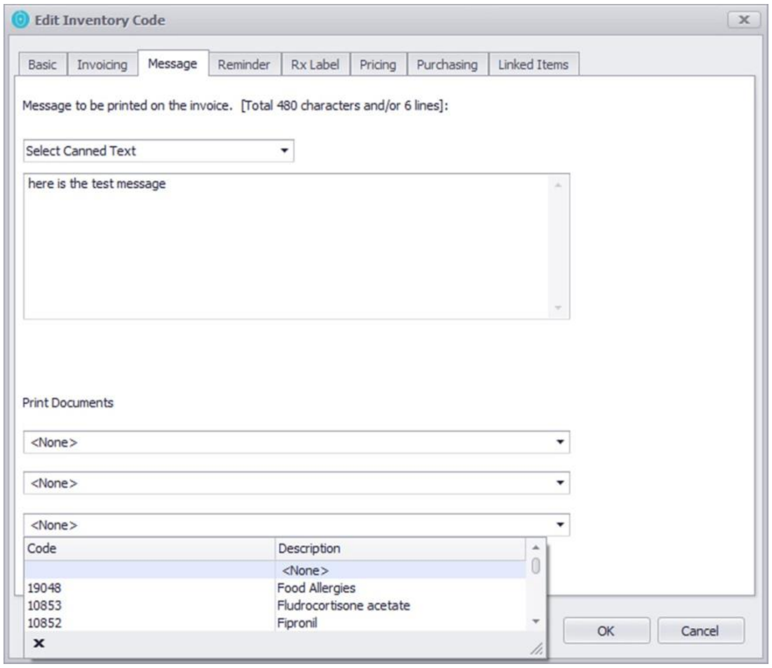
- Overwrite Description – Allows users to change the wording of the description on the invoice and in the patient history for this procedure code. This does not change the description for this code for future use.
- Overwrite Quantity – Allows users to change the quantity being charged.
- Overwrite Price – Allows users to change the unit price for this inventory item at the time of invoicing. If unchecked, the price cannot be changed and will remain the price set in Inventory Code Setup.
- Overwrite Amount – Allows users to change the total amount for the invoice line. If unchecked, the amount will remain the total of the quantity times the unit price.
- Apply Blanket Discount – There are three selections for Discounts (Percentage). Check one.
  - Yes – allows a discount on this inventory item.
  - No – (default) not allowed on this inventory item.
  - Confirm – select at the time of invoicing if the code will be discounted.
- Taxable
  - No Tax – (default) non-taxable inventory item.
  - Sales Tax – charges the primary tax percent for this inventory item. (Tax rates are set up in Setup | Program | General Branch Setup.)
  - Secondary Tax – charges the Secondary Tax percent for this inventory item. (Tax rates are set up in Setup | Program | General Branch Setup.)
  - Add Sales Tax and Secondary Tax – this will add the Sales Tax and the Secondary Tax percentages together and charge them as one total amount.
  - Compound Sales Tax and Secondary Tax – this will apply the Sales Tax first and then taking the total, apply the Secondary Tax to that amount.
- Click OK.
- To revise your selections after the window is saved and closed, reopen the window using instructions given above.
- Select the Invoicing tab.
- Make the desired changes and click OK.



Inventory Code – Message Options

Messages on the invoice can help educate your clients. Entering a message to accompany an inventory product can keep your clients informed of possible side effects and dangers as well as application instructions or ways to administer the product.

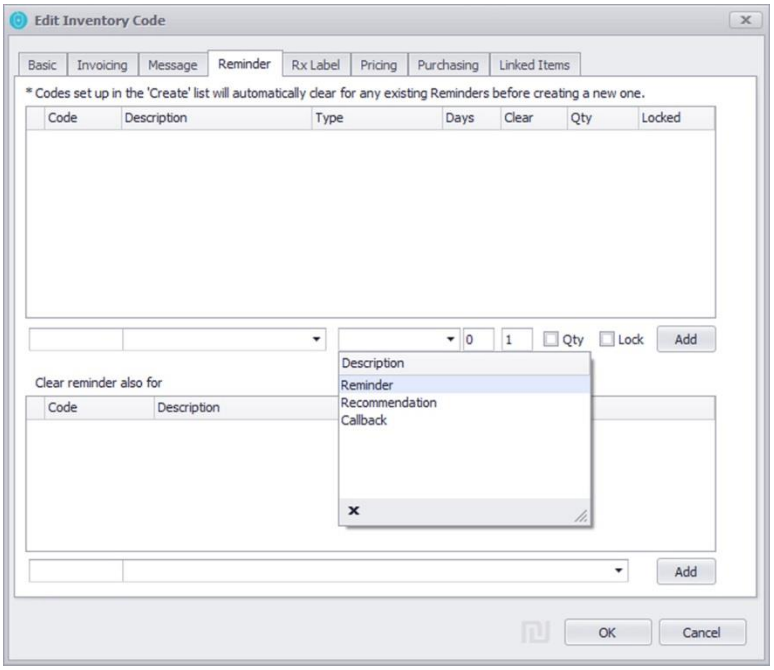
- Click the Message tab.
- Message to be printed on the invoice (total 480 characters and/or 6 lines) – Create a message for the client and/or use Select Canned Text. When this code is on the invoice, the message automatically prints at the bottom of the invoice.
- Print Documents – If you purchased the LifeLearn Client Handouts modules, some documents automatically attach when the LifeLearn installation CD plays. You may also attach any documents that you have created as client handouts. You can print a total of three handouts to send home with your client. Use the down-arrow at the end of each blank field and double-click on the handout to enter it into the blank field.
- Click OK.
- To revise a Message of an existing Inventory Code, double-click the code/description in the Inventory Code List screen, highlight the desired code and click the Edit button at the bottom of the screen.
- Make the desired changes and click OK.
- To remove a Message, double-click the code/description and then select the Message tab. Highlight the message text and press the Delete key on the keyboard.
- Click OK.



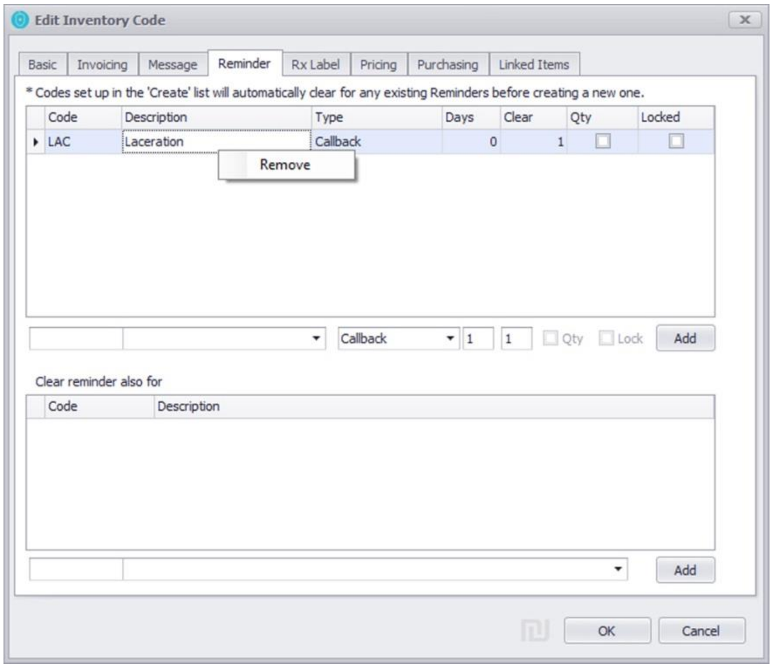
Inventory Code – Reminder Options

Reminder setup is important for sending reminders at regular intervals. Create reminders for inventory items that should be refilled or purchased regularly by the client. A reminder can be set up as a Reminder, Callback, or Manual reminder that creates a reminder but does not clear any previous reminders.

- Click the Reminder tab.
- You can also select the down-arrow next to the center blank field and locate the item; then, double-click on the item to move it into the blank field.
- Type a Code into the left-most section of the blank entry line in the center of the window for the inventory item you wish to create a reminder for when this code is invoiced.
- Select the down-arrow next to the Reminder and choose Reminder or Callback. Recommendation will not show if a code has been selected.

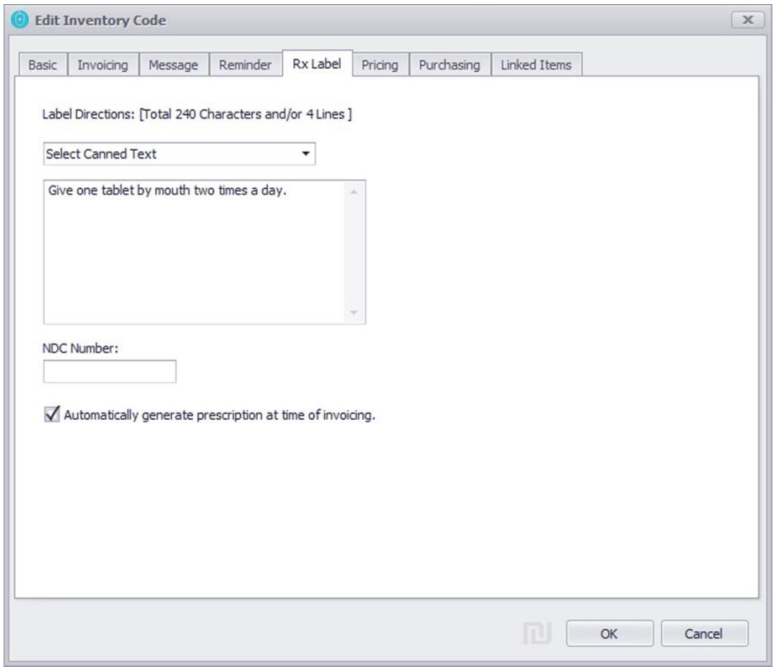


- Set the number of days in which the reminder will generate a due date.
- If you choose Callback, set the number of days in which it will expire.
- Check the Qty box if this is a reminder in which the date needs to change based on the quantity of the code entered. This feature is used mostly with inventory items such as Heartworm or Flea & Tick preventative. If you enter 30 and check Qty, the reminder will be created 30 days later for every item sold, in 60 days if you sell two, in 90 days if you sell three, etc. There can only be one reminder on a code. Multiple reminders or callbacks can be set manually.
- Check the Lock option if you want to make changes to the reminder setup without affecting what was invoiced in the past when running the History and Recall Correction Utility.
- Clear reminder also for – Discontinue reminders for the type code(s) description(s) entered in these fields. You may add an unlimited number of related codes to be cleared when this code is entered.
- Click OK.
- To revise the Reminder setup of an existing Inventory Code, double-click the code/description in the Inventory Code List screen, or highlight and click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To remove a Code/Description/Reminder, scroll the list, highlight the Code/Description, right-click and select Remove.
- Click OK.



Inventory Code – Rx Label Options

- Click the Rx Label tab.
- Enter up to 4 lines of text and/or use Select Canned Text (usually directions) to print on the prescription label. This is the default text that automatically prints and is editable from Medical History or Invoicing. Be sure to leave the name of the product as one of the lines in the label directions; removing the name eliminates it from the Rx label at the time of printing.
- Enter the National Drug Code Number, if needed.
- Check the box to have IntraVet automatically generate a label any time this code is used in Medical History and Invoicing.
- Click OK.



- To revise an existing Rx label, go to the Inventory Code List (previous screen). Scroll to locate the desired code. Highlight the code and choose Edit at the bottom of the screen.
- Make the necessary changes and click OK.
- To remove an inventory code's Rx label instructions or to stop it from prompting for a label, delete the label instructions and/or uncheck the box to generate an Rx label.
- Click OK.

Inventory – Price Update: Pricing Information

Pricing Information allows you to adjust the selling price of this inventory code by single units and quantity as well as automatically adjusting markup percentages.

- Sell Price – Enter selling price per unit for the item.
- Dispensing Fee – Enter the dispensing fee for the item. This amount can be added to whatever the per unit or pill price adds up to in order to defray the cost of dispensing (the label, pill count, etc.).
- Minimum Charge – Enter the minimum charge for the item. Set a minimum so that this code will not be invoiced for less than a certain amount, no matter how many are sold. This can be applied alone or in conjunction with the dispensing fee.
- Current Markup % – Calculates the current markup between the cost and the base selling price. It changes when the cost or price changes to accurately show your current markup.
    a. New
    b. Existing
- Keep Markup % – when checked, if cost changes, markup % automatically adjusts. Why is Markup Disabled? This option (Keep Markup) can be disabled if you have

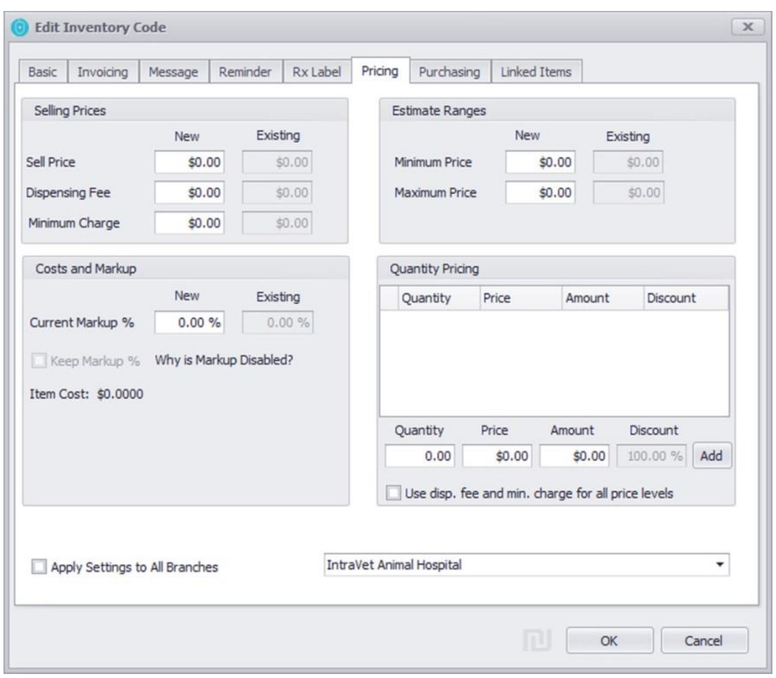
multiple branches or warehouses and do not have a one-to-one relationship between them.

a. If there are multiple warehouses for one branch, they each could have different costs for the same code. This means the markups would be different for each warehouse. There will still be a prompt when costs change; IntraVet cannot assume what markup to apply.

- Item Cost – The base cost of the code as you sell or use it (by pill, CC, can).
- Estimate Ranges Minimum and Maximum Price – If you often create estimates from scratch rather than using pre-defined estimate templates, you can specify a default price range for a code. If defined, whenever the code is used in an estimate, Minimum Price and Maximum Price ranges appear.
- Quantity Pricing – Instead of having multiple codes for an item because you give price breaks for buying more, use quantity pricing to set the price breaks on the same code. You can define up to 3 quantity price break levels. If a bottle of 100 is sold, make the price per pill 20 cents instead of 24 cents, for example.
- Use disp. fee and min. charge for all price levels – Check if you would like the same dispensing fee and minimums to apply to your quantity pricing levels.

a. Many of these individual pricing choices (dispensing fees, minimums, keep markup) can be mass changed by department or for all inventory codes in the Utilities section of IntraVet. If most codes in a certain department should be set up the same, use these utilities to quickly change all of them. Then, go back and adjust the exceptions one by one.

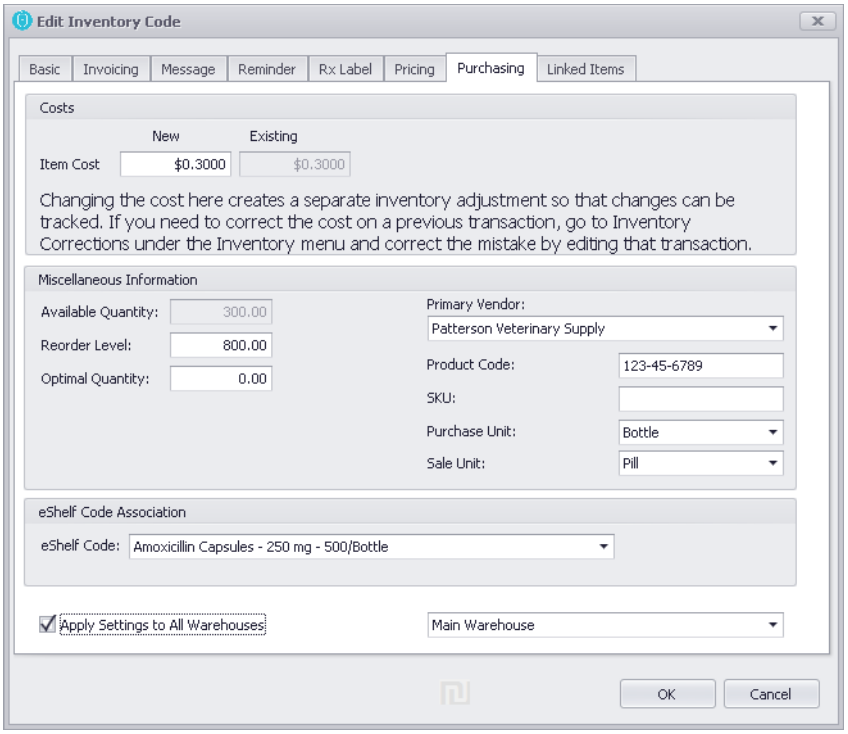
- Apply Settings to All Branches – If checked, this will apply all the settings to all branches. Or click the down-arrow to select the branch to be updated.



Inventory – Purchasing Information

Purchasing Information extends inventory control to overall purchases for your practice to keep a record of your cost, vendor and product data.

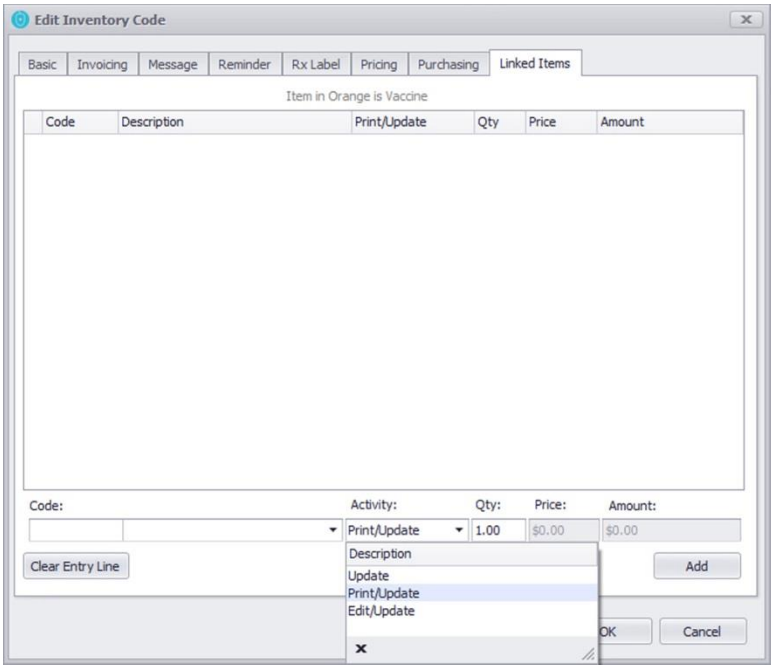
- **Item Cost – Cost can be manually entered, or it is automatically updated when inventory is received.**
- **Available Quantity – This is the amount on-hand.**
- **Reorder Level – Set this number as a guideline to assist you in when to reorder. When stock goes below this level, the item appears on the Inventory Reorder Report and loads into Purchase Orders.**
- **Optimal Quantity – Enter the minimum number of this inventory item that you want to keep on-hand.**
- **Primary Vendor – To assist you in creating Purchase Orders, select a vendor that you have purchased this item from.**
- **Product Code – To assist with future ordering, enter the product code from the vendor.**
- **SKU – Enter the manufacturer's number for reference.**
- **Purchase Unit – Select the unit in which you purchase the item. This will appear as the unit type you order by when receiving inventory.**
- **Sale Unit – Select the unit in which you sell the item. This will appear as the unit type you sell by when receiving inventory.**
- **eShelf Code Association – You can associate your Inventory Codes with eShelf under the Purchasing Tab. At the bottom of this screen you can select the eShelf code that is associated with this Inventory code.**
- **Click Apply Settings to All Warehouses if needed or select the appropriate warehouse using the drop-down.**
- **Click OK to save your information and return to the Inventory Code Setup window.**



Inventory – Linked Items

Procedure codes or other inventory codes can be linked to an inventory code to create groups. When an inventory item is linked, it depletes from the inventory numbers once that code is invoiced.

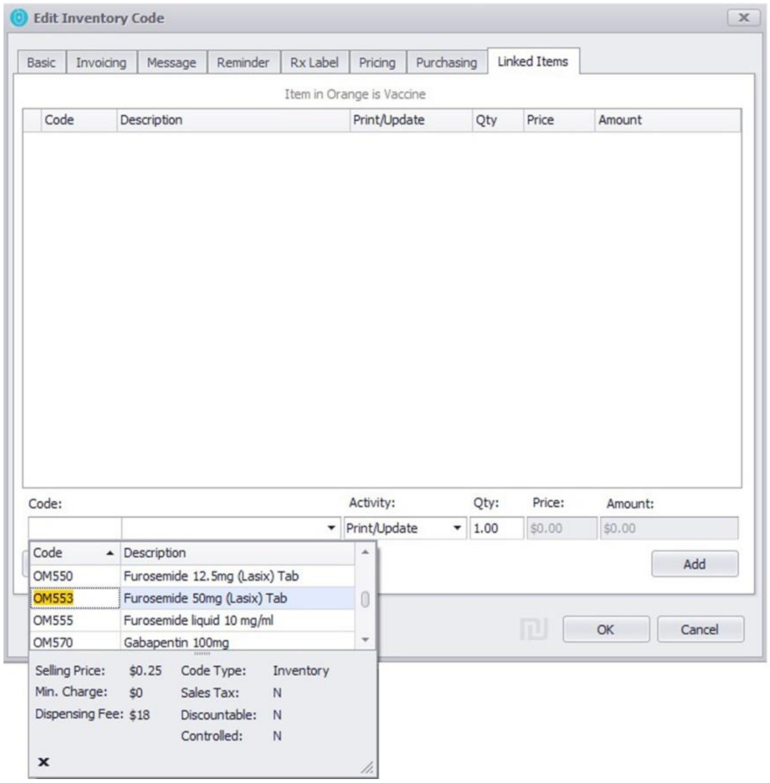
- **Click the Linked Items tab.**
- **In the blank field at the bottom of the window, enter an item you want to link to this code. You can enter the first few letters of the item to quickly go to that alphabetical listing. Double-click on the code or description to move the code into the blank line. If an incorrect item is chosen, select Clear Entry Line to remove it from the field.**
- **Click the down-arrow for Print/Update and choose one of the following:**
  - **Update – depletes inventory but does not show on the invoice/visit.**
  - **Print/Update – prints on the invoice and depletes inventory.**
  - **Edit/Update – allows the item to be edited (such as quantity, etc.) while invoicing and depletes inventory but does not print out.**

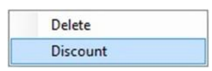


- Quantity (Qty) – This is a default quantity of a linked item.
- Price and Amount – The price (cost of an individual unit) and amount (qty x price) of the item will appear in the next fields as a reference (the selling price of the linked code is defaulted and can only be changed at the time of invoice if the linked item is set to Edit/Update, Print/Update, or if you set the linked item up as discounted within the linking).
- Click Add to move your selection into the upper grid.
- Add additional codes to link as necessary.
- Click OK.

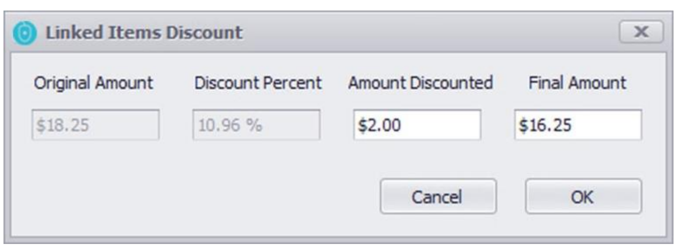
To edit or make changes to the Linked Items

- Double-click the code/description in the Inventory Code List screen, or highlight the code and click the Edit button at the bottom of the screen.
- Select the Linked Items tab.
- To add another item to the linked list, type a partial code or description into the blank entry line under the grid, or double-click in the line and scroll to your selection. Then, click Add to move it into the blank line.

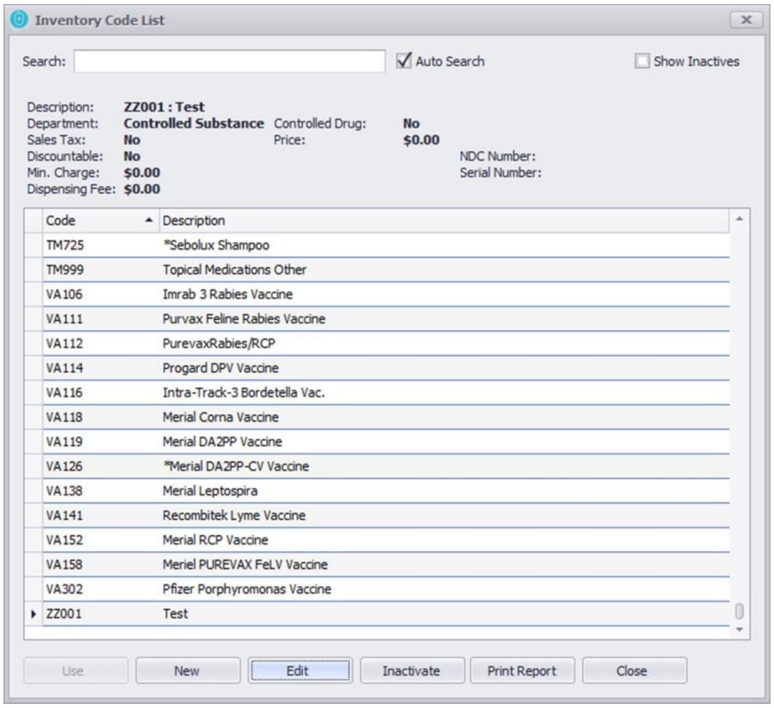


- Repeat steps above.
- Right-click on the item, select Discount. 

Enter the amount you want to discount the item. IntraVet fills in the rest of the data.
- When you are finished, click OK to save your data, or click Cancel to not make a discount change.



- If you want to remove an item, right-click on any line and choose Delete.
- When you are done adding and deleting items, click OK.
- To inactivate an inventory code, locate it. Select it and click the Inactivate button.

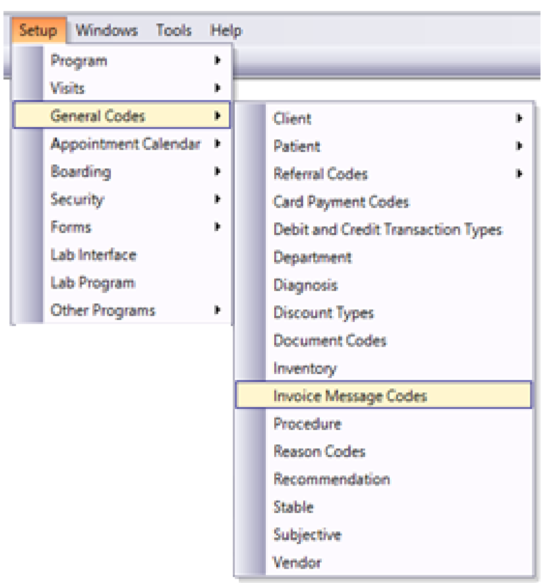


Invoice Message Codes

Invoice Message codes are used to attach additional messages to printed invoices. These messages could be used for seasonal messages or marketing, for example. When creating an invoice message code, you have the option to edit the message at the time of invoicing.

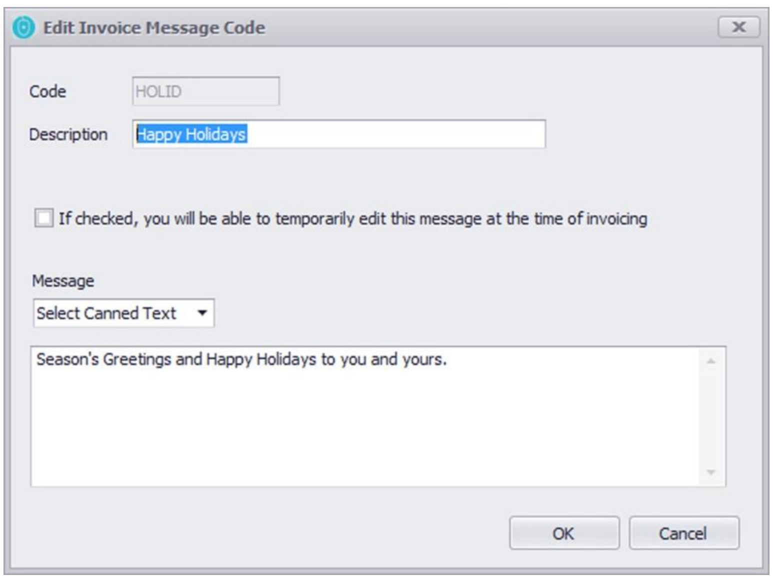
Message Codes – Create, Edit or Delete Invoice

- From the IntraVet Menu Bar, select Setup | General Codes | Invoice Message Codes.



- To create a new Invoice Message code, click New at the bottom of the Invoice Message Code List screen.
- Enter a Code.

- Enter a Description.
- Enter a message and/or use Select Canned Text . Messages can contain up to 870 characters (including spaces and punctuation).
- By placing a check mark in the box, you can edit the message temporarily at the time of invoicing. (Changes made will not change the invoice message code default but are intended to give you the ability to “customize” the messages on an individual basis for your clients.)
- Click OK.
- To revise a Description or Message of an existing Invoice Message code, reopen the window if it has already been saved and closed. Select Edit or double-click on the code/description.
- Make the changes and click OK.



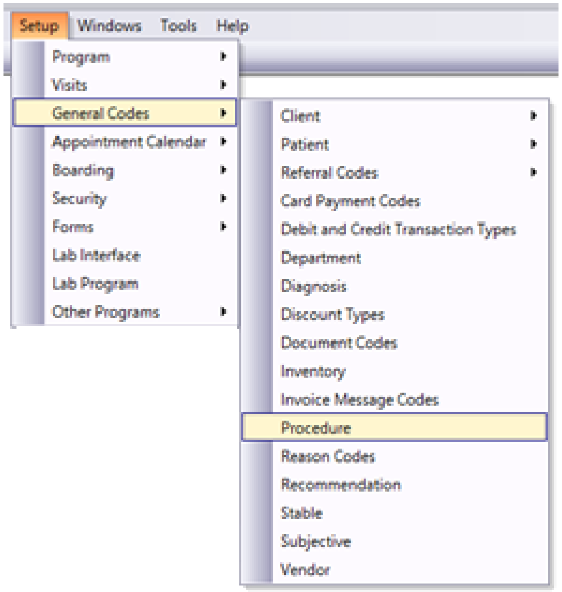
Procedure Code Setup

Procedure codes are used for the services your practice provides. Some examples include:

- Office calls (Professional Fees)
- Lab work
- Surgeries
- Vaccinations

Procedure Codes – Basic Tab

- From the IntraVet Menu Bar, select Setup | General Codes | Procedure.



- To create a new Procedure code, select New at the bottom of the Procedure Code List screen.
- Enter a Code.
- Enter a Description. This description should be the terminology used in your practice.
- Enter a Client Description. The description field automatically fills in the Client Description.

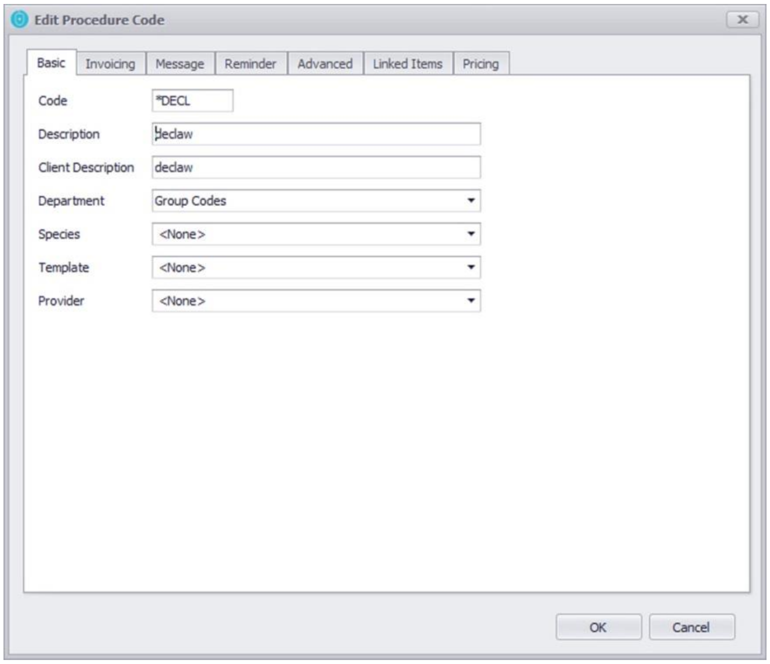
  It can be manually changed so that it better explains the charges to your clients. E.g., Description – "Dental Prophy"; Client Description – "Dental Cleaning."
- Select the down-arrow or click inside the blank entry line, and scroll to your choice to select a Department.

  Every procedure code must be assigned to a department. This helps determine where the information for this code prints on departmental productivity reports and departmental listings.
- Select the down-arrow or click inside the blank entry line, and scroll to your choice to select a Species. Assign a specific species to your code.

  A message appears if this code is invoiced under a different species. It will not prevent you from using the code on the wrong species. (This is not a required field.)
- Select the down-arrow or click inside the blank entry line, and scroll to your choice to select a Template.

  Each procedure code can be associated with a template and canned text so that medical note entries will be consistent. Refer to the General Branch Setup chapter for information about Canned Text. (This is not a required field.)
- Enter the Provider code, or select the down-arrow, or click inside the blank entry line and scroll to your choice to select a Provider.

  This sets this procedure code to be credited to a particular provider. This is particularly helpful if there are lab, grooming, or technical procedures that should not report on the attending veterinarian's productivity. Be sure the Providers have been set up under Operator Setup. (This is not a required field.)



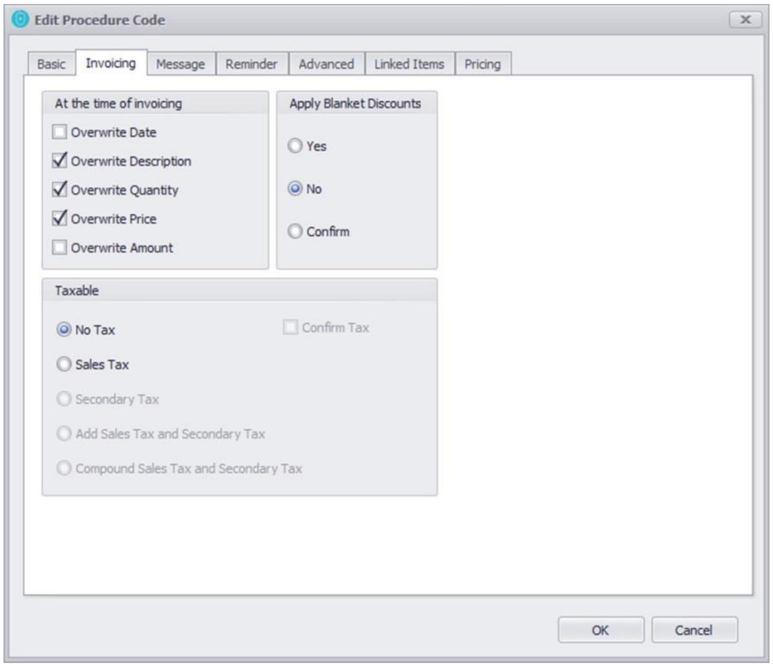
- To revise information in the Basic tab, reopen the window if it has been saved and closed.
- To revise the Description of an existing Procedure code, highlight the desired code and click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)

Procedure Codes – Invoicing Options

At the time of invoicing, you can overwrite the following data. By default, all items are checked to be overwritten. Uncheck any item that you do *not* want overwritten for a particular procedure code.

- Select the Invoicing tab.
- Overwrite Date – Allows users to change the date on the invoice line. This is helpful if you have a patient that has been treated over a period of time. The line items will be entered into history using the date entered on the invoice. However, the accounting date for the entire invoice will be the date on which it is permanently saved.
- Overwrite Description – Allows users to change the wording of the description on the invoice and in the patient history for this procedure code. This does not change the description for this code for future use.
- Overwrite Quantity – Allows users to change the quantity being charged.

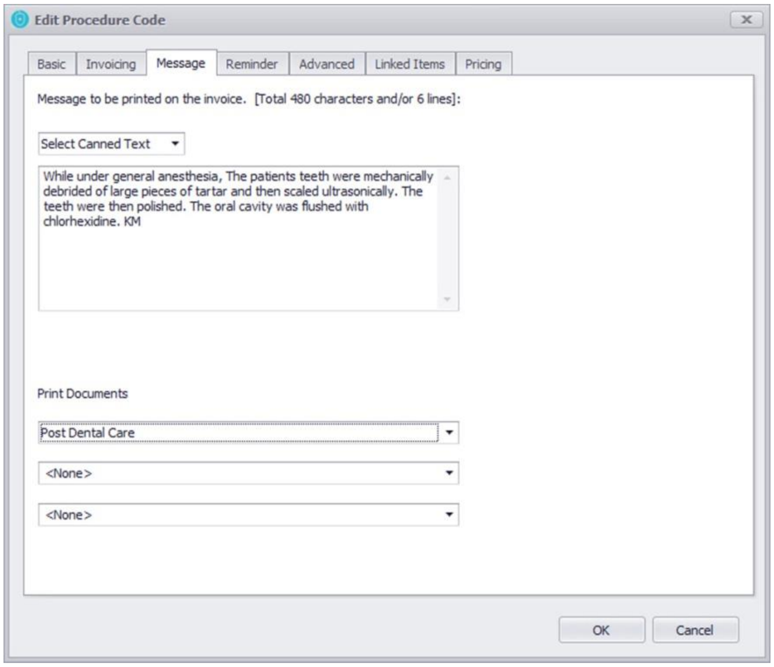
- Overwrite Price – Allows users to change the price for this procedure at the time of invoicing. If unchecked, the price cannot be changed and will remain the price set in procedure code setup.
- Overwrite Amount – Allows users to change the total amount for the invoice line. If unchecked, the amount will remain the total of the quantity times the unit price.
- Apply Blanket Discount – There are three selections for Discounts (Percentage). Check one.
    a. Yes – allows a discount on this inventory item.
    b. No – (default) not allowed on this inventory item.
    c. Confirm – select at the time of invoicing if the code will be discounted.
- Taxable
    a. No Tax – (default) non-taxable inventory item.
    b. Sales Tax – charges the primary tax percent for this inventory item. (Tax rates are set up in Setup | Program | General Branch Setup.)
    c. Secondary Tax – charges the Secondary Tax percent for this inventory item. (Tax rates are set up in Setup | Program | General Branch Setup.)
    d. Add Sales Tax and Secondary Tax – this will add the Sales Tax and the Secondary Tax percentages together and charge them as one total amount.
    e. Compound Sales Tax and Secondary Tax – this will apply the Sales Tax first and then taking the total, apply the Secondary Tax to that amount.
- Click OK.
    a. If there is a secondary tax set up, there will be additional options for setting secondary taxes. [Refer to the General Branch Setup chapter.]
- To revise your selections after the window is saved and closed, reopen the window using instructions given above.
- Select the Invoicing tab.
- Make the desired changes and click OK.



Procedure Codes – Message Tab

Messages on the invoice can help you to educate your clients. Procedures often have side effects or precautions that can be printed on the invoice to help reinforce the information you give your clients in the exam room.

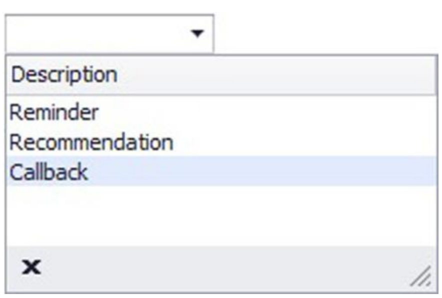
- Select the Message tab.
- To create a new Procedure Message, begin typing the new message into the blank Message field and/or use Select Canned Text.
- To change an existing message, highlight the code/description that contains the message to be changed. Click Edit. Click the Message tab and revise the message. Click OK.
- Print Documents – If you purchased the LifeLearn Client Handouts or have created your own documents, at the time of invoicing, you can print a total of three handouts to send home with your client. Select the down-arrow next to each blank line to make a selection, or type the first few letters of the handout in the blank next to the arrow.
- Click OK.
- To revise a Message of an existing Procedure Code, double-click the code/description in the Procedure Code List screen, or highlight and click the Edit button at the bottom of the screen.
- To remove a Message, double-click the code/description and then select the Message tab. Highlight the message text and press the Delete key on the keyboard.
- Click OK.



Procedure Codes – Reminder Setup

Reminder setup is important for sending reminders at regular intervals. Create reminders for vaccinations, lab work, dental procedures, and other procedures regularly performed. A reminder can be set up as a reminder, a callback, or a manual reminder that creates a reminder but does not clear any previous reminders.

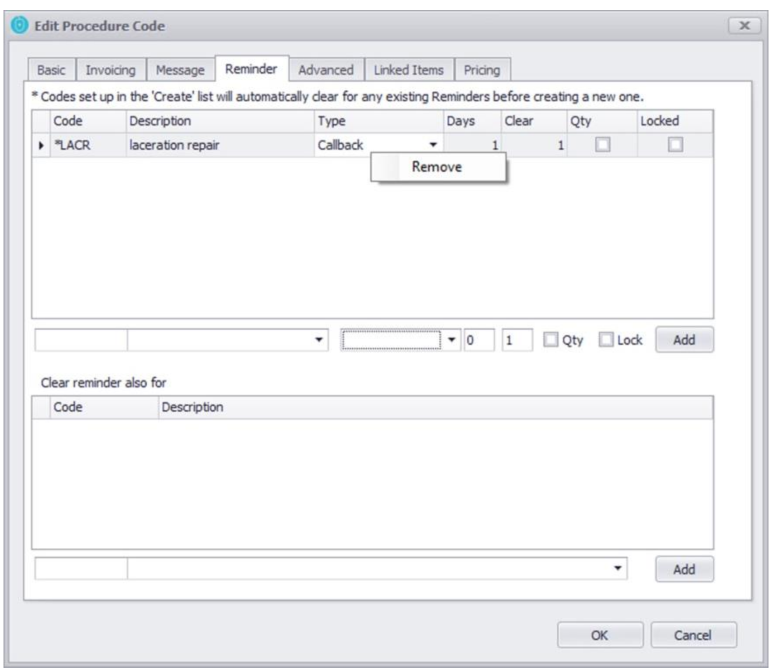
- Select the Reminder tab.
- In the blank entry line in the center of the window, enter a code for the procedure you wish to create a reminder for when this code is invoiced, or type the first few letters of the reminder's name into the blank next to the down-arrow; scroll to your choice and double-click on the name.
- Select the down-arrow next to the Description and choose Reminder, Recommendation or Callback for this reminder. You can have only one reminder on a code; you can set multiple callbacks.



- In the next field to the right, set the number of days in which the reminder will generate a due date.
- If you choose Callback, set the number of days in which it will expire.
- Check the Qty box if this is a reminder in which the date needs to change based on the quantity of the code entered. This feature is used mostly with inventory items such as

Heartworm or Flea & Tick preventative. If you enter 30 and check Qty, the reminder will be created 30 days later for every item sold, in 60 days if you sell two, in 90 days if you sell three, etc.

- Check the Lock option if you want to make changes to the reminder setup without affecting what was invoiced in the past when running the History and Recall Correction Utility.
- Press Enter to move your selection into the grid.
- Clears reminders also for – Type a code description into the field or use the down-arrow to make your selection.
- Click Add to move your selection into the grid. You may add an unlimited number of related codes to clear when this code is entered.
- Click OK.
- To revise a Reminder of an existing Procedure Code, scroll the list and double-click on the Code/Description to open the Edit Procedure Code screen. Click the Reminder tab. Another option is to highlight the desired item and click Edit.
- Make the necessary changes and click OK.
- To remove a Code/Description/Reminder, locate it, or right-click on the Reminder Code and choose Remove. (A second chance warning will appear asking to confirm the decision to Remove.)
- Click OK.



Procedure Codes – Advanced Setup

When the Advanced tab is selected it causes the code to make changes to other files when it is entered on a permanently saved patient invoice.

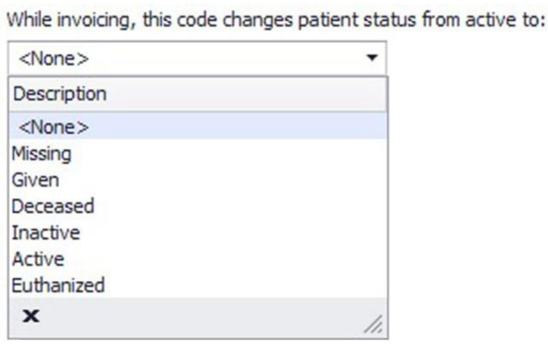
- Select the Advanced tab.

- This code is (Choose one):
    - Vaccination – If marked, the code will be counted on various vaccination and procedure reports. It will show in the current vaccination certificate.
    - Rabies Vaccination – If marked, the code will be counted on various vaccination and procedure reports. It will show in the current vaccination certificate. It also allows you to reprint the rabies certificate if needed.
    - Neither – This lists the codes as a procedure code, not listed on any vaccination reports, but other procedure reports.

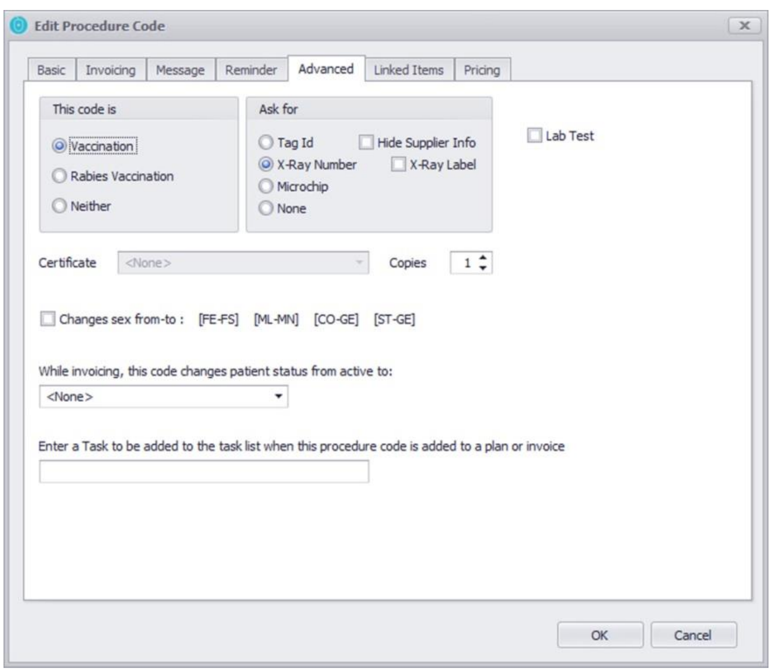
      Hide Supplier Info – When either of the vaccinations above has been selected you have the option to hide the supplier's information.
- Ask For (Choose one):
    - Tag ID – when this procedure code is entered into an invoice, a prompt asks for a Tag ID (rabies tag number) to be recorded to the patient information and printed on the Rabies Certificate (if set up).
    - X-Ray Number – when this procedure code is entered into an invoice, a prompt asks for an X-Ray Number. If this option is selected, you also have the option to print an X-Ray Label.
    - Microchip – when this procedure code is entered into an invoice, a prompt asks for a Microchip number to be recorded to the patient information.
    - None – (default) should be marked for all codes that do require any of the advanced functions listed above.
- Lab Test – Check this box if this code is for a lab test. This generates a lab request when invoiced to track requests and attach imported lab results.
- Certificate – If necessary, select the down-arrow to choose (from the list available) a rabies certificate to print. Form 51 is the AVMA standard recommendation. If you need more than one copy, change the number in the Copies field.

- Changes sex from-to – Select this checkbox if this is a code that would require a change of sex. IntraVet automatically changes the sex of the animal when the invoice is permanently saved. Typically used for spay and neuter surgery procedure codes, etc. (See Patient Setup "Create or Edit Patient Species Codes" at the beginning of this chapter.)
- While invoicing, this code changes patient status from active to – If this code needs to change a patient's status to anything other than active, select the down-arrow or double-click in the blank line and choose the patient's new status. This status change

occurs when the invoice is permanently saved. This is typically used for euthanasia and cremation procedure codes, etc.



- Enter a Task to be added to the task list when this procedure code is added to a plan or invoice – The task will automatically be attached to the patient in the Control Center when this Procedure Code is added to the patient's visit plan or invoice. See the Control Center chapter.
- Click OK.
- To revise the information, reopen the setup window if it has already been saved and closed. Select the Advanced tab.
- Edit items by using the steps above.
- Click OK.



Procedure Codes – Linked Items

Procedure codes or other inventory codes can be linked to an inventory code to create groups. When an inventory item is linked, it depletes from the inventory numbers once that code is invoiced.

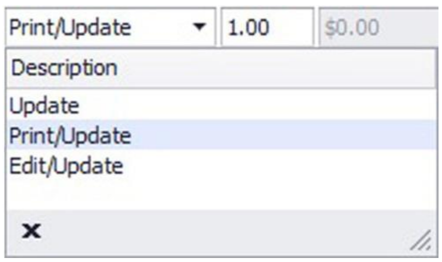
- Click the Linked Items tab.

- In the blank field at the bottom of the window, enter an item you want to link to this code. You can enter the first few letters of the item to quickly go to that alphabetical listing. Double-click on the code or description to move the code into the blank line. If an incorrect item is chosen, select Clear Entry Line to remove it from the field.
- Click the down-arrow for Print/Update and choose one of the following:

  a. Update – depletes inventory but does not show on the invoice/visit.

  b. Print/Update – prints on the invoice and depletes inventory.

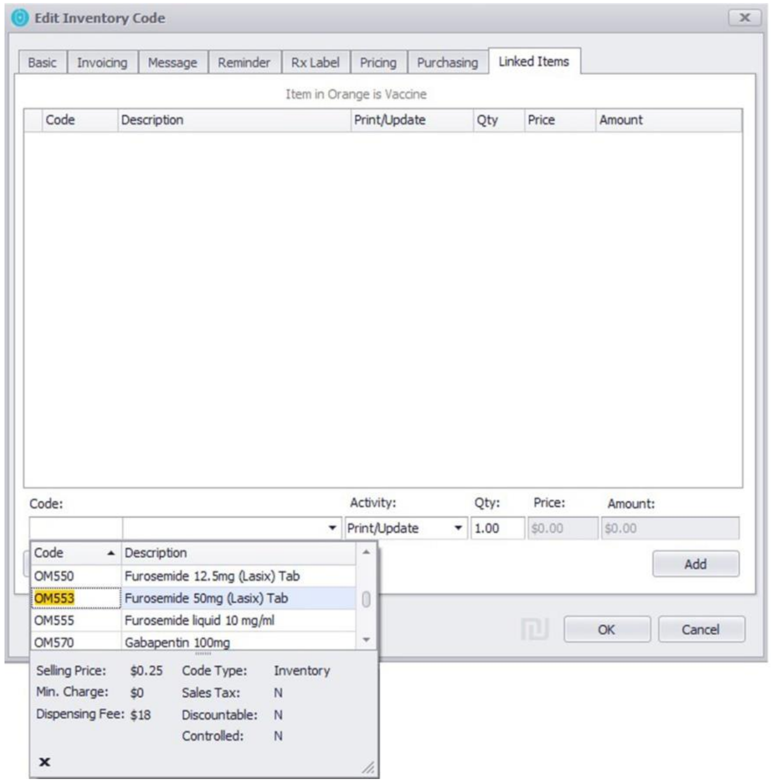
  c. Edit/Update – allows the item to be edited (such as quantity, etc.) while invoicing and depletes inventory but does not print out.



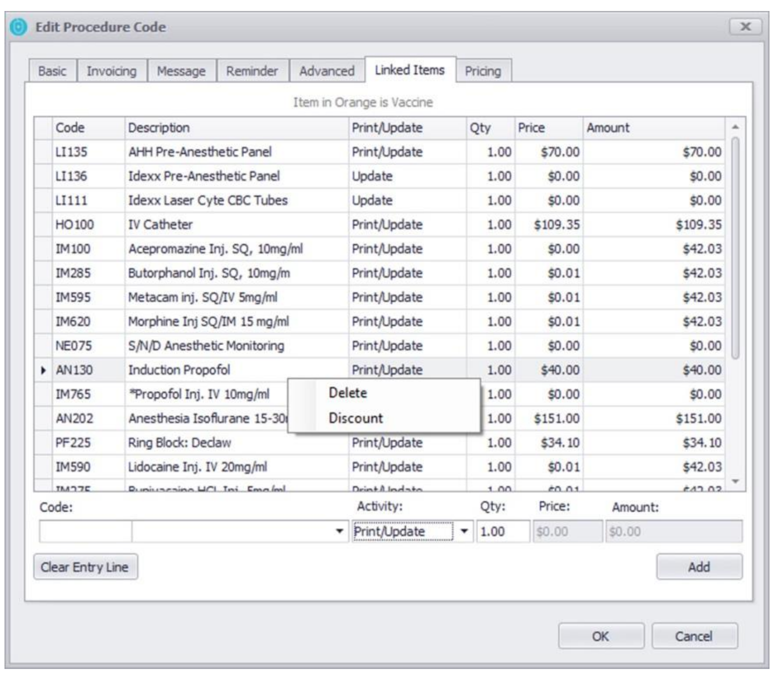
- Quantity (Qty) – This lists if a default quantity of a linked item should be used.
- Price and Amount – The price (cost of an individual unit) and amount (qty x price) of the item will appear in the next fields as a reference (the selling price of the linked code is defaulted and can only be changed at the time of invoice if the linked item is set to Edit/Update, Print/Update, or if you set the linked item up as discounted within the linking).
- Click Add to move your selection into the upper grid.
- Add additional codes to link as necessary by repeating the steps above.
- Click OK.

To edit or make changes to the Linked Items

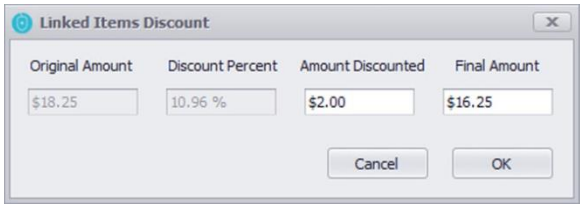
- Double-click the code/description in the Inventory Code List screen, or click once to highlight the code and click the Edit button at the bottom of the screen.
- Select the Linked Items tab.
- To add another item to the linked list, type a partial code or description into the blank entry line under the grid, or double-click in the line and scroll to your selection. Then, click Add to move it into the blank line.



- Repeat steps above.
- Right-click on the item, select Discount. Enter the amount you want to discount the item. IntraVet fills in the rest of the data.
- When you are finished, click OK to save your data, or click Cancel to not make a discount change.



- Enter either the discount percentage or the amount you want to discount the item. IntraVet fills in the rest of the data.



- When you are finished, click OK to save your data, or click Cancel to not make a discount change.
- You can click the OK button and close the window if you are only adding to the list and/or setting up discounts.
- However, if you also want to delete a linked item, do not click OK yet. Right-click on any line and choose Delete.
- When you are done adding and deleting items, click OK.

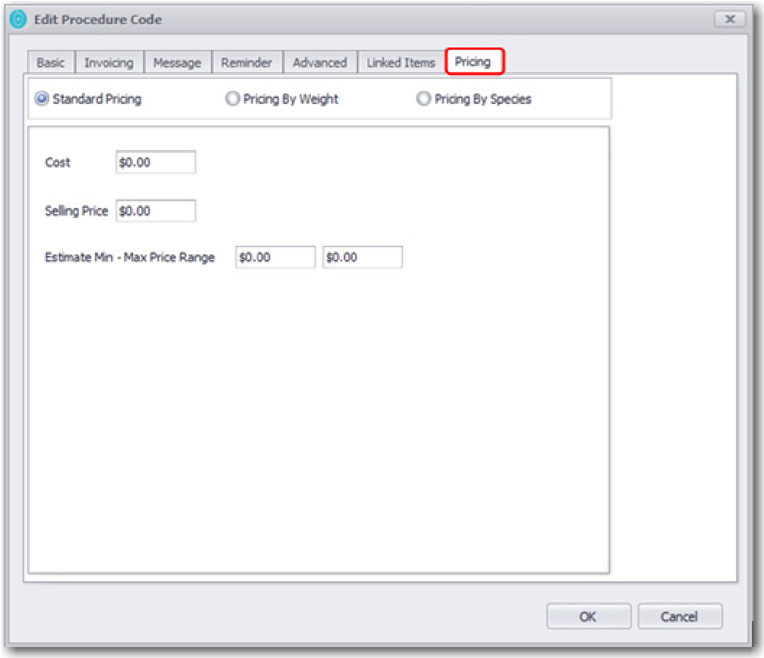
Procedure Code – Pricing Options

Pricing can only be set as one of the three options: Standard Pricing, Pricing by Weight, or Pricing by Species.

- Click the Pricing tab.

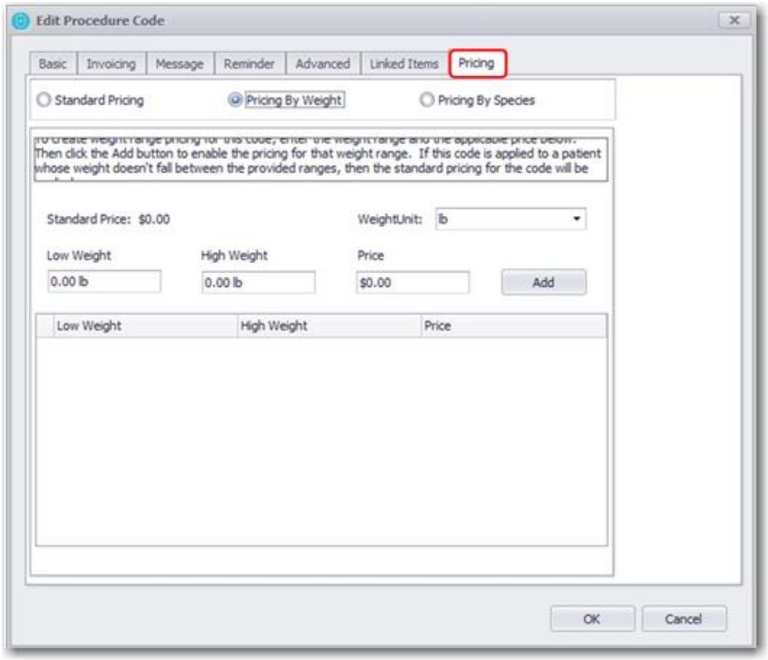
For Standard Pricing:

- Select the Standard Pricing radio button to charge standard prices.
- Enter a Cost for this procedure. (optional) Although procedures are usually not things that you buy, you can enter a cost for the procedure code. This is intended for procedures such as laboratory and disposal that are purchased services with associated costs. For those procedures that have a cost defined, productivity reports print productivity, cost and net.
- Enter a Selling Price. Enter the price that you normally charge for this procedure. Price can be set to allow overwrite from the Invoicing tab in Procedure Code Setup. See "Invoicing Options".
- Enter a price range to use as a default in estimates. (This is not a required field.)



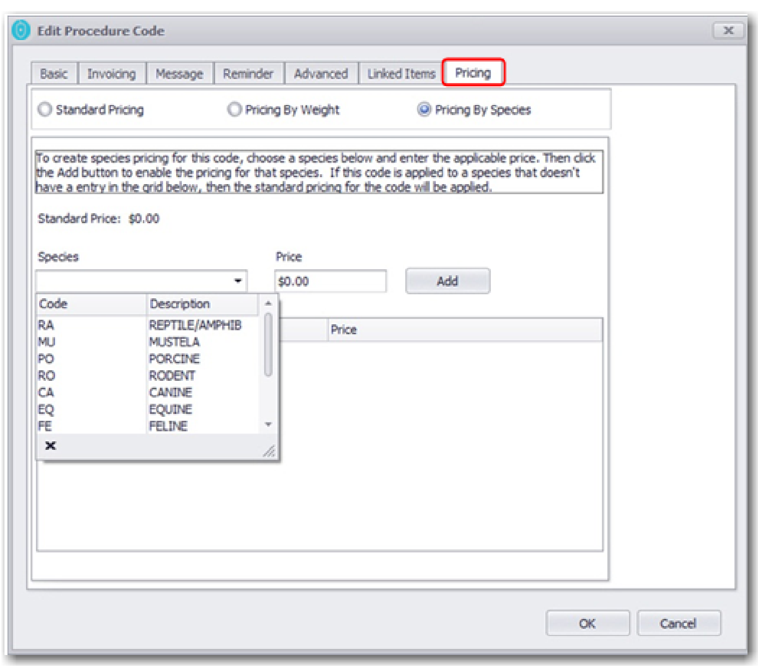
For Pricing By Weight:

- Click in the Pricing By Weight radio button to charge by the patient's weight.
- Use the down-arrow to select the Weight Unit, or double-click anywhere inside the entry line.
- Set the Low and High Weight range.
- Enter the price for that weight range and click Add to display your weight ranges and associated prices in grid.
- Repeat the steps above to add additional weight ranges until all weight categories are satisfactorily defined. (Choosing a different weight unit after a weight range has been defined will convert existing ranges to the new weight unit.) If this code is applied to a patient whose weight does not fall within a weight range you defined, the Standard Pricing for this code is applied.



For Pricing By Species:

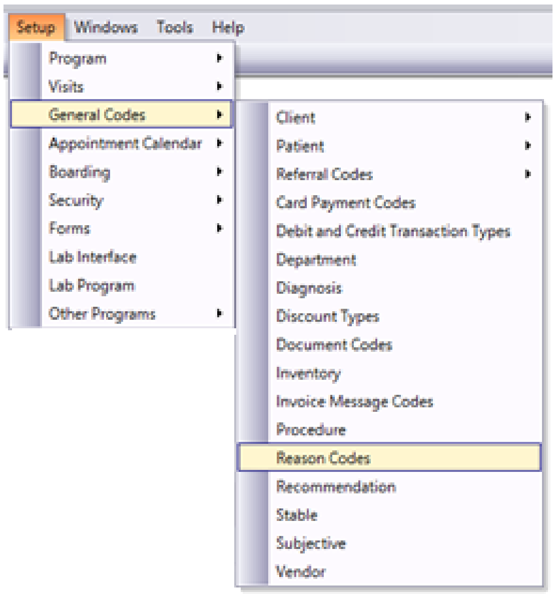
- **Click in the Pricing By Species radio button to charge by the patient's species.**
- **Use the down-arrow to select the Species, or double-click anywhere inside the entry line.**
- **Enter the price and click Add to display your species-defined prices in the grid. If this code is applied to a patient whose species is not displayed in the grid, the Standard Pricing for this code is applied.**
- **When complete, click OK to save.**



Reason Codes

Reason Codes are chosen when creating a new appointment and provide a brief description of the purpose of the patient's visit.

- From the IntraVet Menu Bar, select Setup | General Codes | Reason Codes.



To create a new Reason Code:

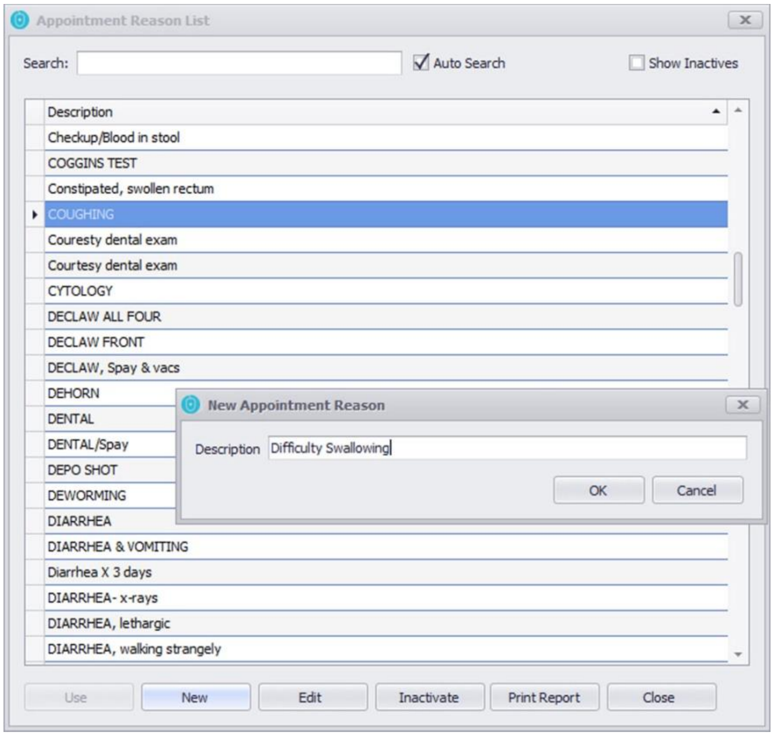
- Click New.
- Enter a Description.
- Click OK.

To edit a Reason Code:

- Click Edit.
- Update the Description.
- Click OK.

To inactivate a Reason Code:

- Click Inactivate.

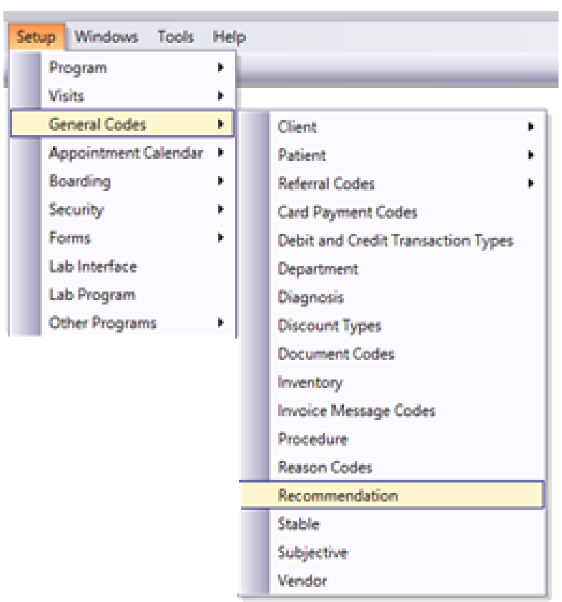


Recommendation

You can keep track of those clients who follow your instructions, e.g., schedules a dental exam within 60 days after you recommend one to them. When the client does not schedule an appointment, "No Compliance" prints on reports.

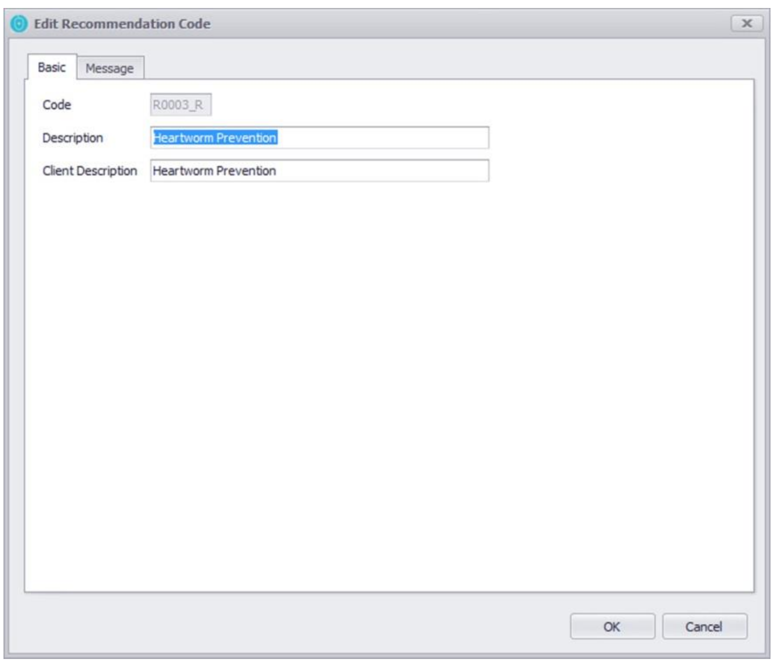
Recommendation Code – Basic Tab

- **From the IntraVet Menu Bar, select Setup | General Codes | Recommendation.**



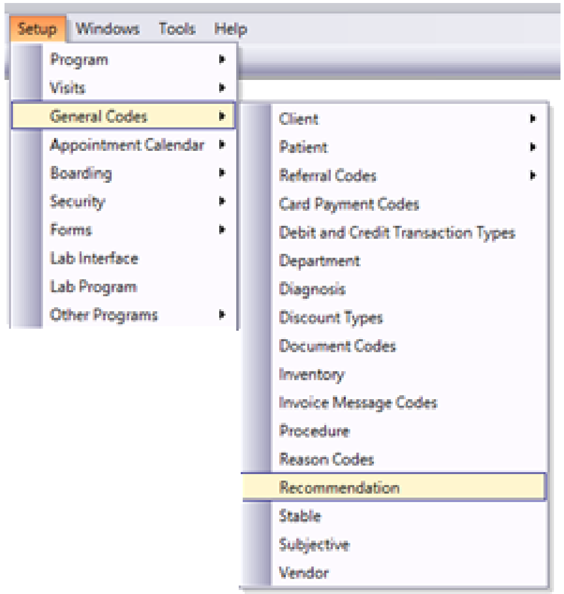
- **To create a new Recommendation code, select New at the bottom of the Recommendation Code List screen.**

- Click the Basic tab.
- Enter a Code.
- Enter a Description. The Description is the terminology you typically use in your practice.
- Enter a Client Description. Use terminology that a client will better understand. For example, the Description might be “Dental Prophy,” but the Client Description would be “Dental Cleaning.”
- Click OK.
- To revise a Description or Client Description of an existing Recommendation code, click once to highlight, and then click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Code/Description, highlight the desired code and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)

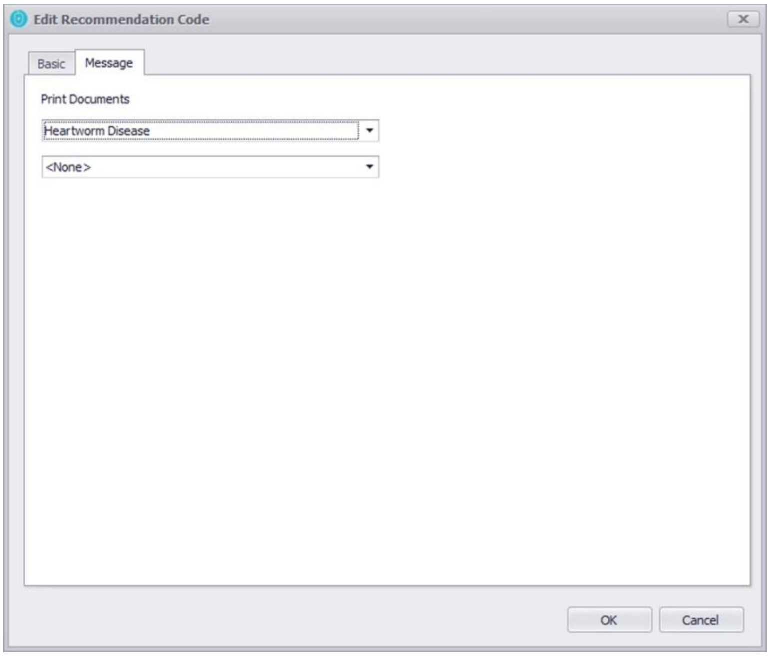


Recommendation Code – Message Tab

- From the IntraVet Menu Bar, select Setup | General Codes | Recommendation.



- **Highlight the Recommendation Code that requires a message. Select Edit at the bottom of the Recommendation Code List screen.**
- **Select the Message tab.**
- **Click the down-arrow next to each Print Documents field to select a maximum of two handouts to send home with the client.**
- **Click OK.**
- **To revise your choices after the window has been closed, repeat steps above.**
- **Click OK.**
- **To inactivate a Recommendation Code and its associated message code, highlight it in the Recommendation Code List screen and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.) You will receive a pop-up that alerts you that the process could take some time.**

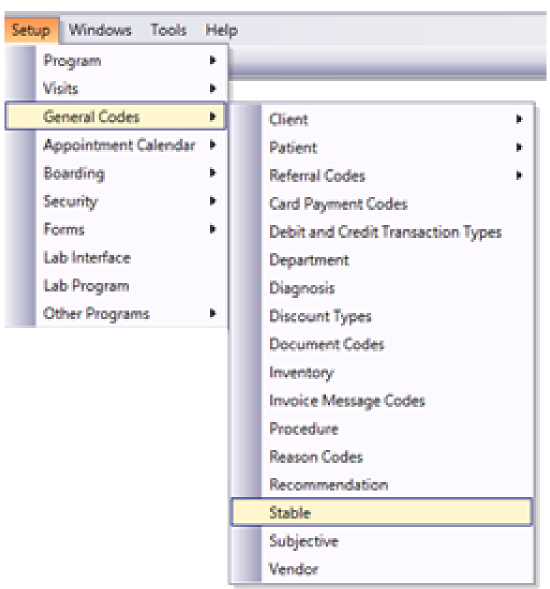


Stable

Stable codes can be assigned when equine specific features are enabled in General Branch Setup. You can search for all horses at a particular stable through Recall Generator. Refer to the chapter Communications for information about Recall Generator.

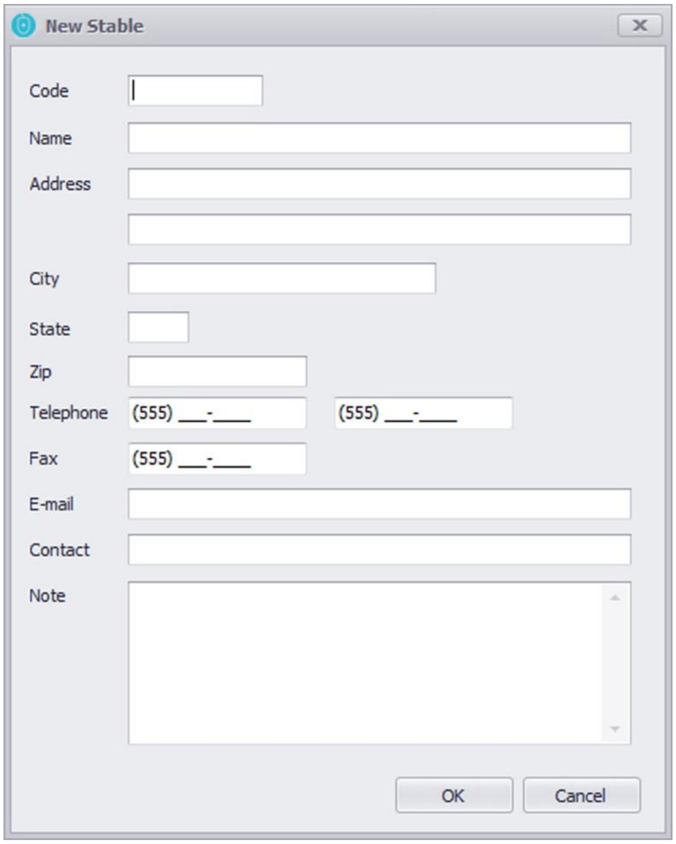
Stable Codes – Create, Edit or Delete

- **From the IntraVet Menu Bar, select Setup | General Codes | Stable.**



- **To create a new Stable code, select New at the bottom of the Stable Code List screen.**
- **Fill in the empty fields. (All fields are optional.)**
- **Click OK.**

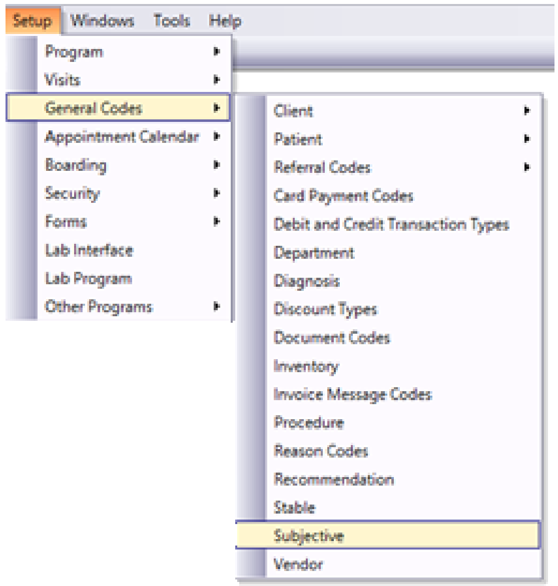
- To revise a Description or Stable information after the window has been closed, highlight the Stable Code in the Stable List screen. Click Edit at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Stable Code, highlight it in the Stable List screen and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)



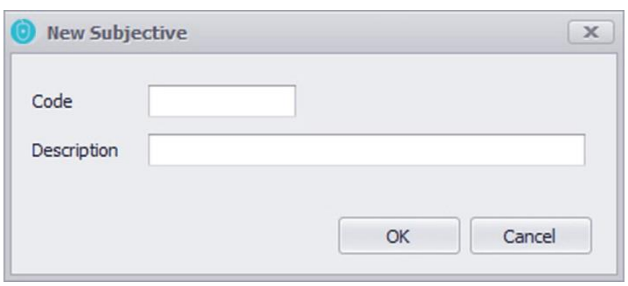
SOAP – Subjective

Subjective Codes – Create, Edit or Delete

- From the IntraVet Menu Bar, select Setup | General Codes | Subjective.



- To create a new Subjective code, select New at the bottom of the Subjective List screen.
- Enter a Code.
- Enter a Description. The Description is the terminology you typically use in your practice.
- Click OK.

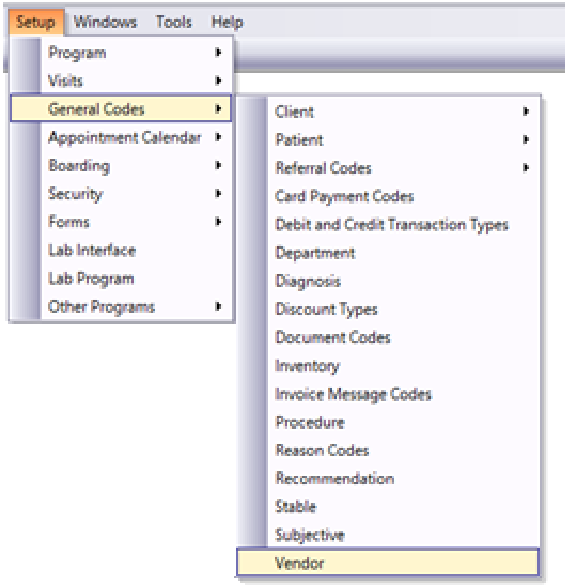


- To revise a Subjective Code, double-click the code/description in the Subjective List screen, or click once to highlight and click the Edit button at the bottom of the screen.
- Make the necessary changes and click OK.
- To inactivate a Subjective Code, highlight it in the Subjective List screen and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)

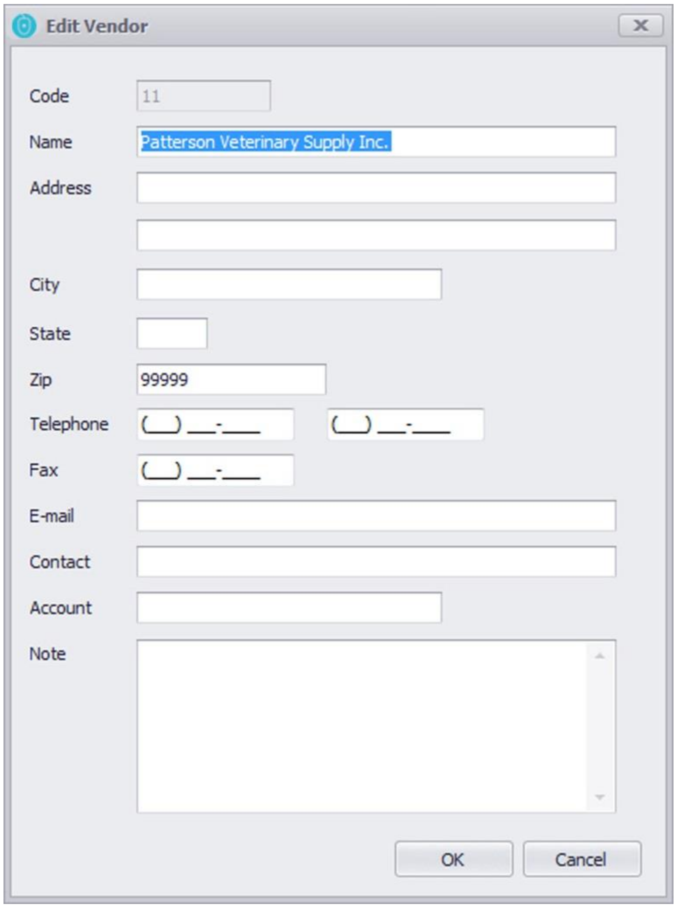
Vendor

Vendor codes should be set up for every vendor from whom you purchase products. Vendor codes are used to receive inventory, track purchase history by vendor and run reorder reports by vendor. Purchase Orders can also be created by vendor. All inventory received through IntraVet must have a vendor associated.

- From the IntraVet Menu Bar, select Setup | General Codes | Vendor.



- **To create a new Vendor code, click the New button at the bottom of the Vendor List screen.**
- **Enter the new code into the blank Code field.**
- **Fill in the empty fields. (All fields are optional except for Name and Zip.)**
- **To revise a Vendor Code, double-click the code/description in the Vendor List screen, or click once to highlight and click the Edit button at the bottom of the screen.**
- **Make the necessary changes and click OK.**



- **To inactivate a Vendor highlight it in the Vendor List screen and click the Inactivate button at the bottom of the screen. (A second chance warning will appear asking to confirm the decision to Inactivate.)**

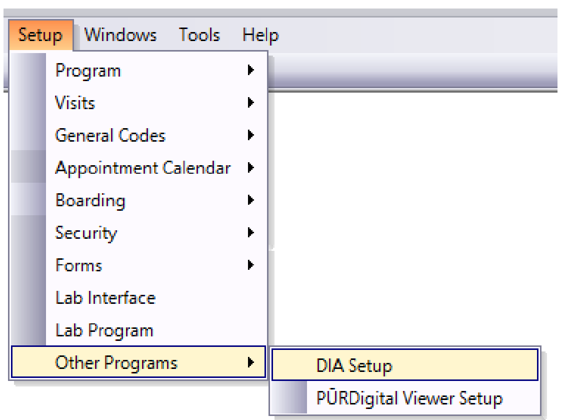
Other Programs Setup

DIA

DIA is a client education program that is integrated into IntraVet. Once you install DIA, you can access its files from IntraVet.

Settings

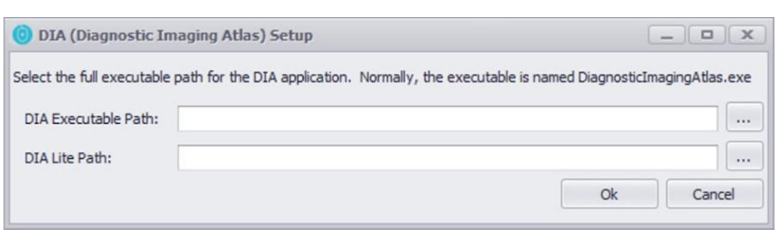
- **From the IntraVet Menu Bar, select Setup | Other Programs | DIA Setup.**



- **If you have the full DIA program, enter the path or use the … ellipsis button and navigate to the location where DIA is stored, and select to enter that path in the DIA Executable Path field.**

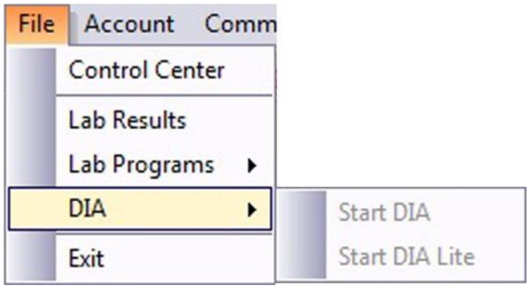
- **If you have the DIA Lite program, enter the path or use the … ellipsis button and navigate to the location where DIA is stored, and select to enter that path in the DIA Lite Path field.**

- **Click OK.**



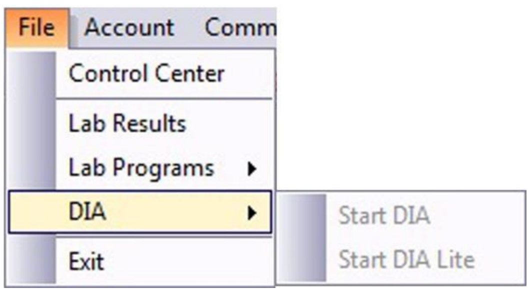
Start DIA

- From the IntraVet Menu Bar, select File | DIA | Start DIA.



Start DIA Lite

- From the IntraVet Menu Bar, select File | DIA | Start DIA Lite.

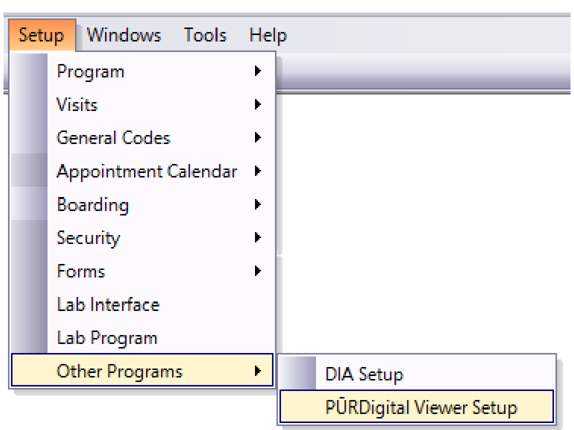


PURDigital Viewer Setup

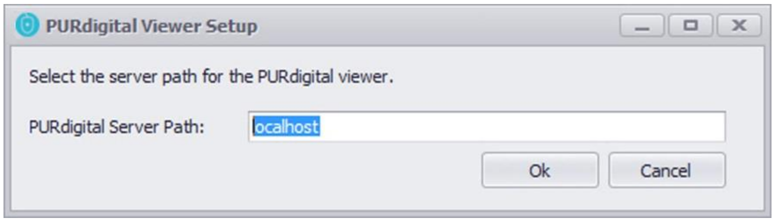
The PURDigital Viewer allows you to view Dicom images (digital x-rays, etc.) that are stored on your PACS server.

PACS (Picture Archiving and Communications System) is a combination of hardware and software dedicated to storage, retrieval, distribution and presentation of images.

- From the IntraVet Menu Bar, select Setup | Other Programs | PURDigital Viewer Setup.



- Enter the server name to connect to the PURDigital Viewer.
- Click OK.



General Security & Auditing Setup

IntraVet offers a wide range of security settings so that you can make your program as open or as secure as you would like. There are two main areas of security setup: General Branch Setup and Security Setup. General Branch Setup provides security auditing features. Security Setup includes: Security Templates, User Setup and Job Setup.

- Security Templates – set up the position held and their access level.
    - Doctor
    - Hygienist
    - Receptionist
    - Etc.
- User Setup – set up each user that will access the system. The user setup is required to have both a user name and password and must be set up prior to enabling the General Branch Setup | Security.
    - C Smith, DVM
    - Technician
    - M Adams
    - Security Administrator
    - Emergency
    - Etc.
- Job Setup – set up the job description. This is only required if you are going to use the Time Clock and should be set up first.
    - Holiday
    - Kennel

- Overtime
- Etc.

Passwords control who has access to open a window or perform a certain function. Auditing records who makes certain changes.

Security Setup

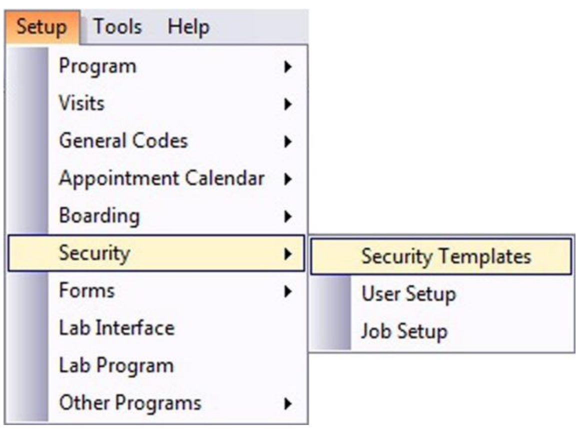
Setting up users and passwords will help protect the integrity of your data by allowing only certain individuals access to specific areas of the program.

Security Template

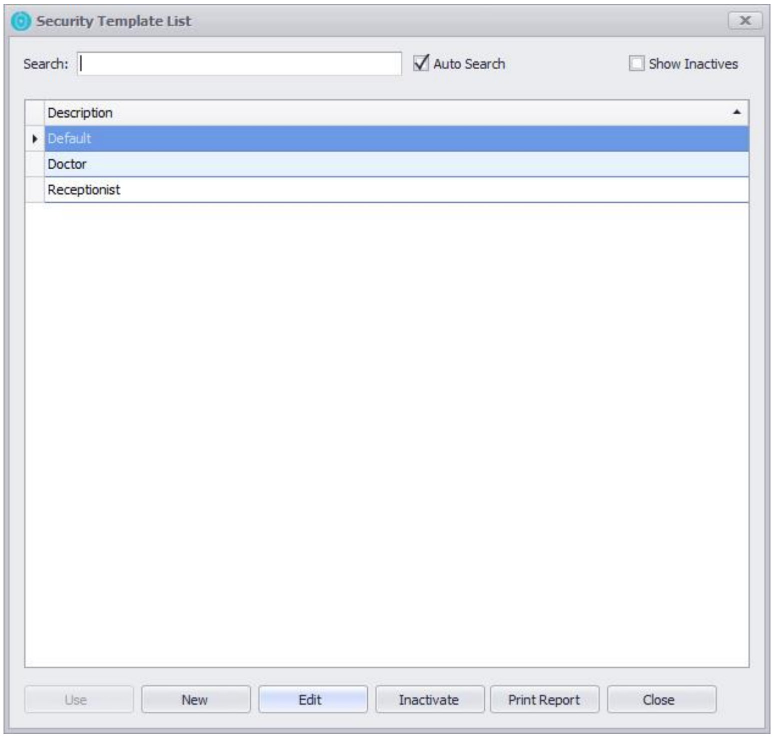
The access levels are used to protect certain functions within IntraVet. These levels may be assigned to each Operator to quickly associate certain functions with a certain job type – all kennel staff, for example. You can set up as many roles as your practice needs, but some common roles include Owner (with access to everything), Practice Manager, Doctor, Technician, Inventory Manager and Receptionist.

How to Set Up Security Templates

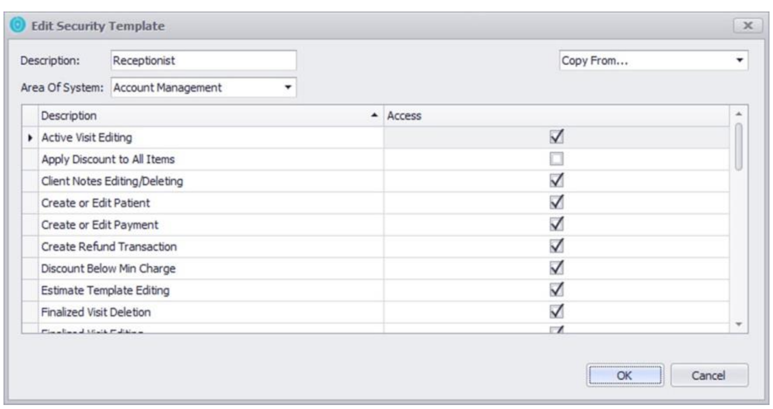
- From the IntraVet Menu Bar, select Setup | Security | Security Templates.



- Highlight a Description or Enter the Search field.
- Click New.
- To Edit roles, select the Description to highlight; then select the Edit button.



- Enter a Description of the users' position.
- Select the Area of System to be accessed. To do this, use the down-arrow. Check all access levels that pertain. Select as many areas as pertain to the chosen position and repeat with the access levels.
- If this position uses the same areas of the system as another position, you can copy the areas of access. To do this, click the Copy From down-arrow and select the matching position.
- To remove Access, uncheck.



Assign Access Levels

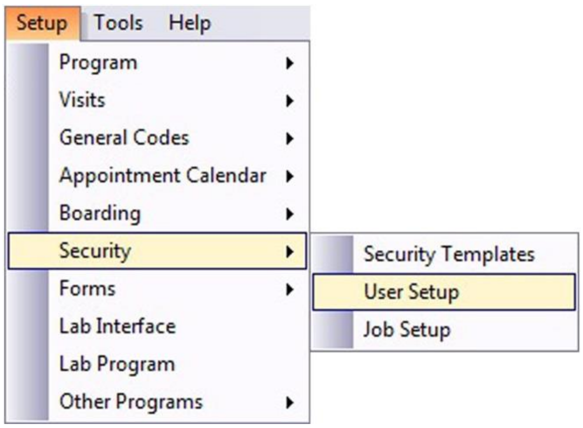
Within the Edit User Screen click the Security button at the bottom. From the Edit Security Template you can choose the area of system to check the boxes to grant access to those areas of the system.

User Setup

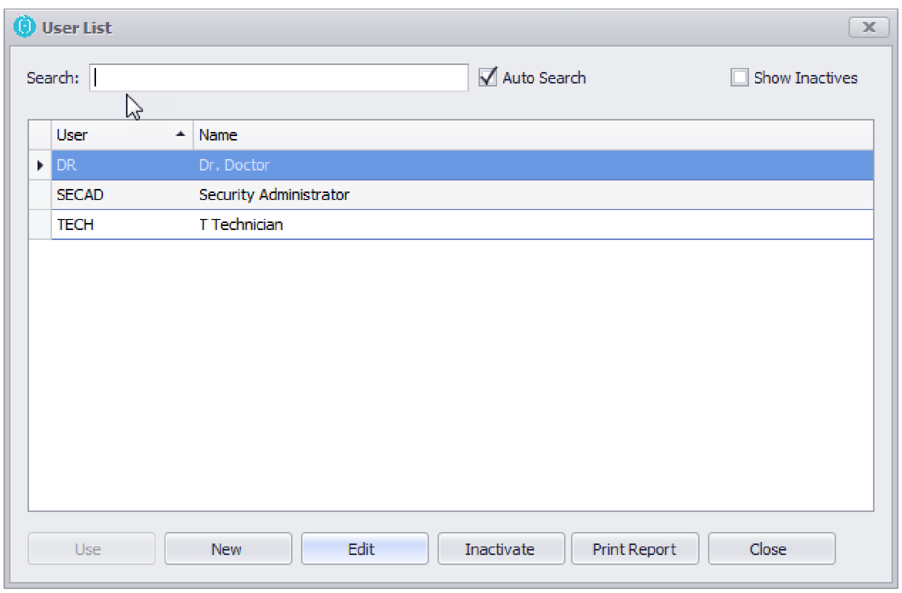
They must have an ID, a first and last name, and they require a password and Job Description if username and password (required for Time Clock) is set up under General Branch Setup | Security for the branch.

How to enter Operator IDs

- **From the IntraVet Menu Bar, select Setup | Security | User Setup.**



- **Click New or Edit.**
- **To inactivate an operator, click once on the name to highlight. Click Inactivate.**



- **Enter the User ID.**
- **Enter a Password. You may need a minimum number of characters if you have set up a minimum in General Branch Setup | Security.**
- **Use the down-arrow to select a Job Description.**
- **Check the Provider box (bottom left) if the ID is for a provider.**

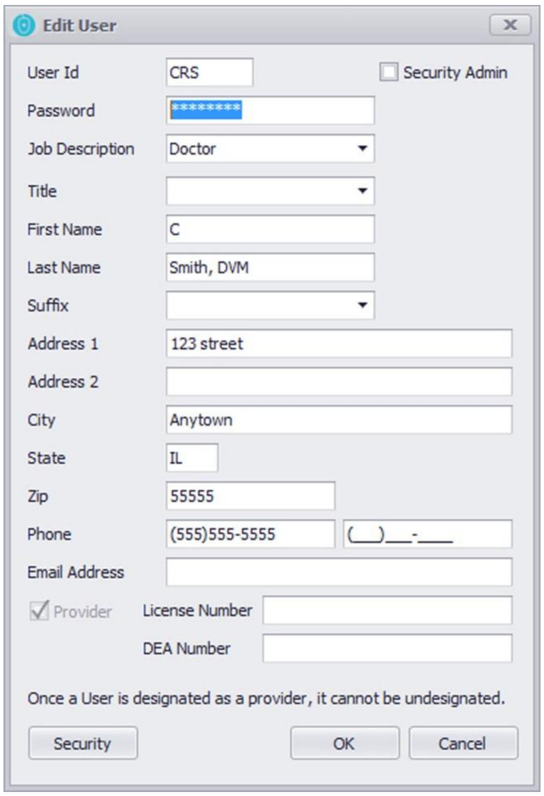
Providers are generally doctors but could be anyone else who provides services at your practice. Operators must be denoted as providers to be chosen in the invoice or listed

on the appointment calendar. Once a User is designated as a provider, it cannot be undesignated.

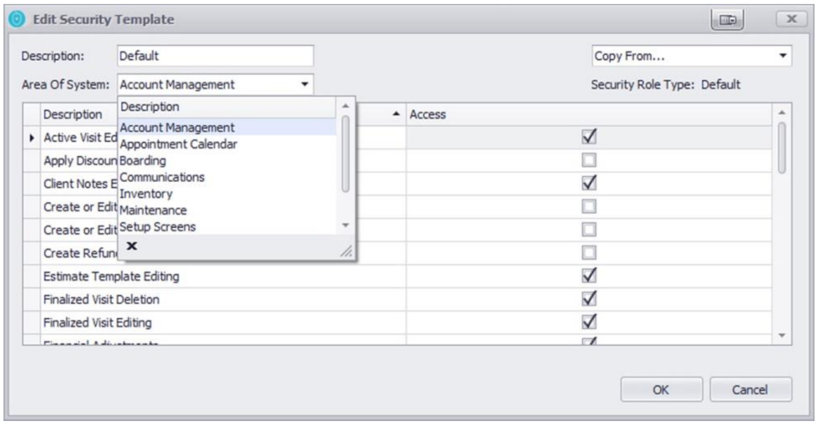
- Enter a License number of a provider (bottom right).
- Enter the DEA number for a provider.
- Add additional information as needed.
- Click OK.

If further security needs to be set up for a particular user:

- Click Security.



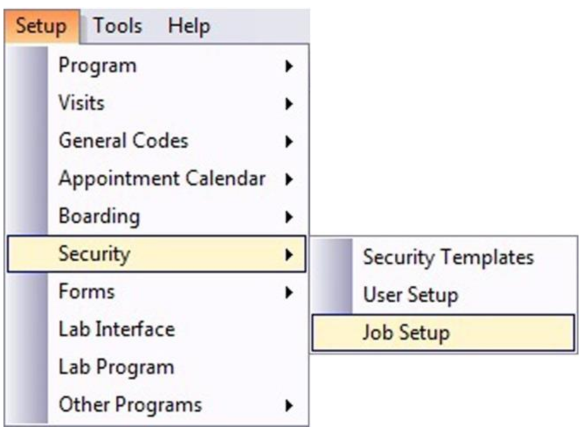
- Select the Area of System the User will access.
- Check the activities they will be allowed to Access.
- Repeat for each Area of System.
- Click OK.
- Click OK again.
- Click Close.



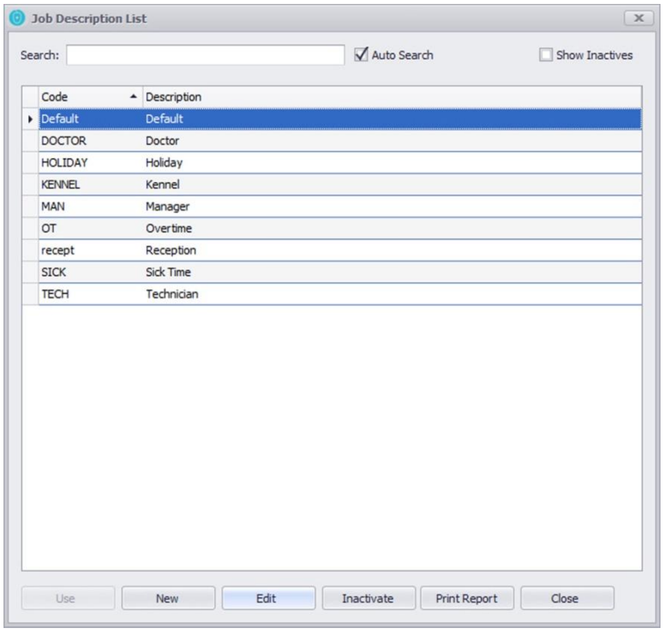
Job Setup

A Job is the duty the employee is performing within your practice. This is required for Time Clock use and can be assigned to the employees through the User Setup.

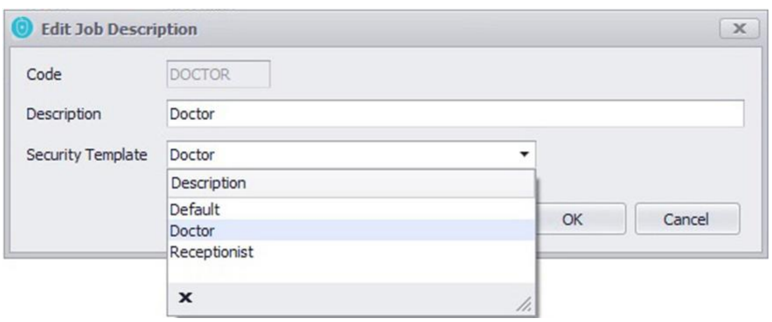
- **From the IntraVet Menu Bar, select Setup | Security | Job Setup.**



- **All Job Descriptions for your practice that you can password protect are listed.**
- **Select one and click Edit.**



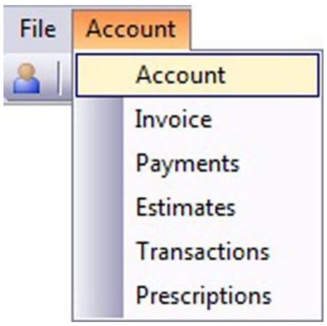
- **Click the down-arrow to select the Security Template you want to apply to this job description.**
- **Click OK.**
- **Click Close.**



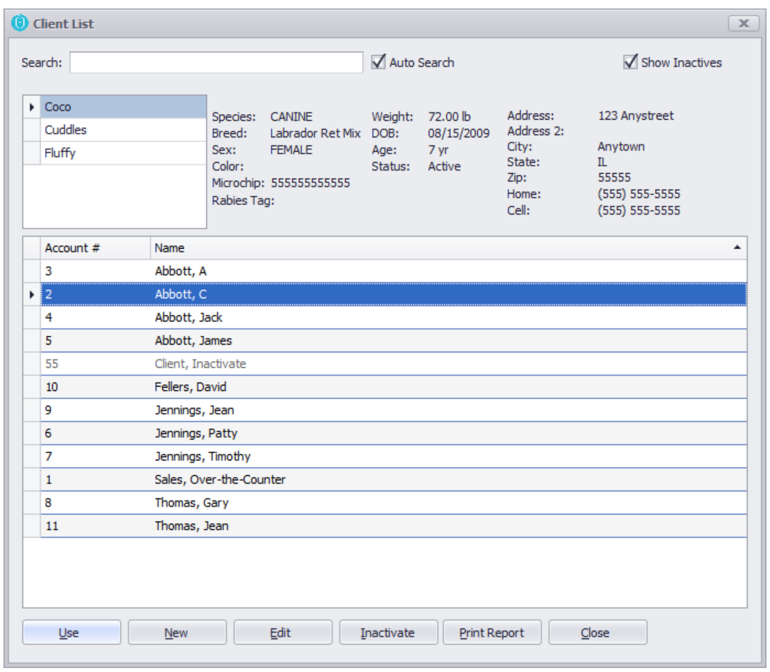
- **After setting up the above information, go to Setup | Program |General Branch Setup and under Security you will want to set up the security options for each area.**

Client Account Management

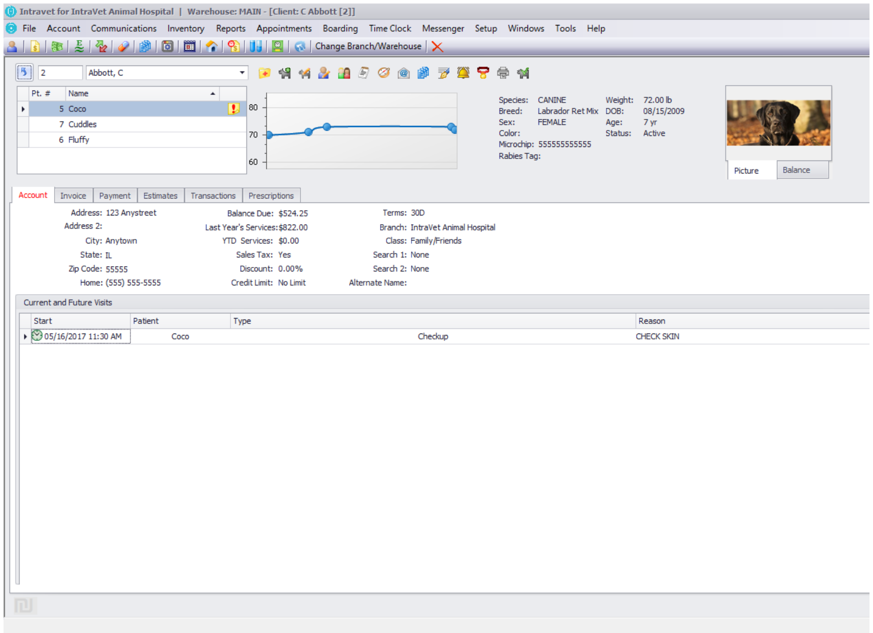
- From the IntraVet Menu Bar, select Account | Account, or select the Open Account icon.



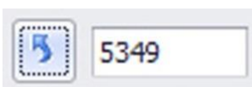
- From the Client List screen, highlight the client account name and click Use.



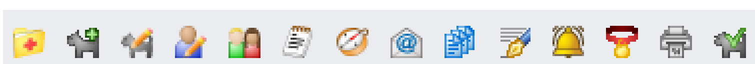
There are picture icons that guide you to certain areas within the Client Account Management screen. The client's account number and name are listed at the top of this screen. The client's patient(s) are listed on the left near the top. Select a patient's name to receive additional patient information.



The blue arrow in the top left corner returns you back to the client list where you can then select a different client.



In the Client Account Management screen there are picture icons that can be selected to easily move through the different areas of the client and patient information.



 Medical History

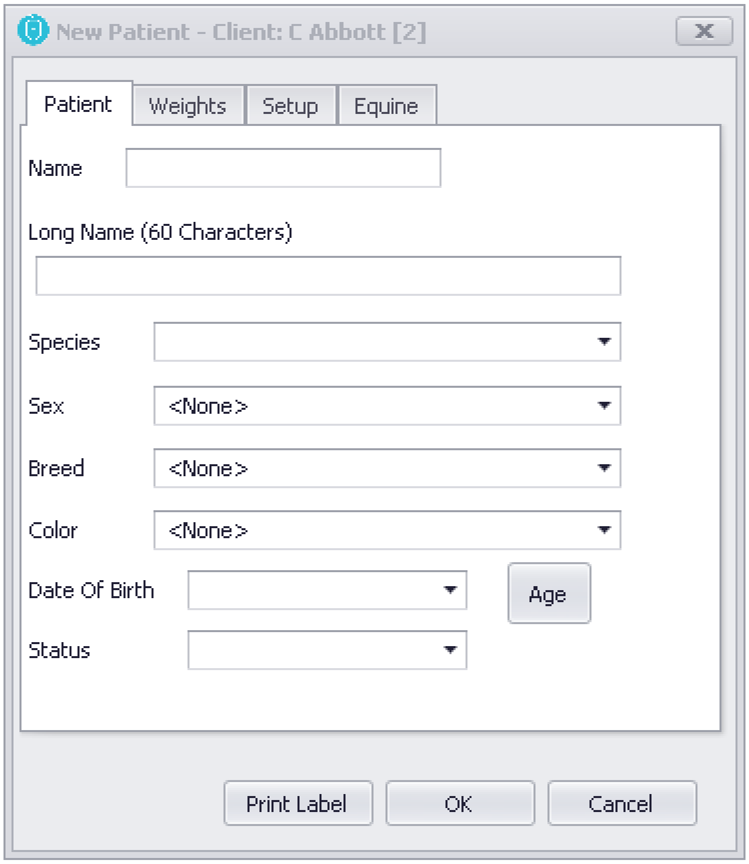
The Medical History icon takes you to information regarding the patient's medical history. You can print or email the patient's medical history when needed.

 Add Patient

The Add Patient icon brings up the new patient screen, where all the patient information can be added, as well as weights, and setup options.

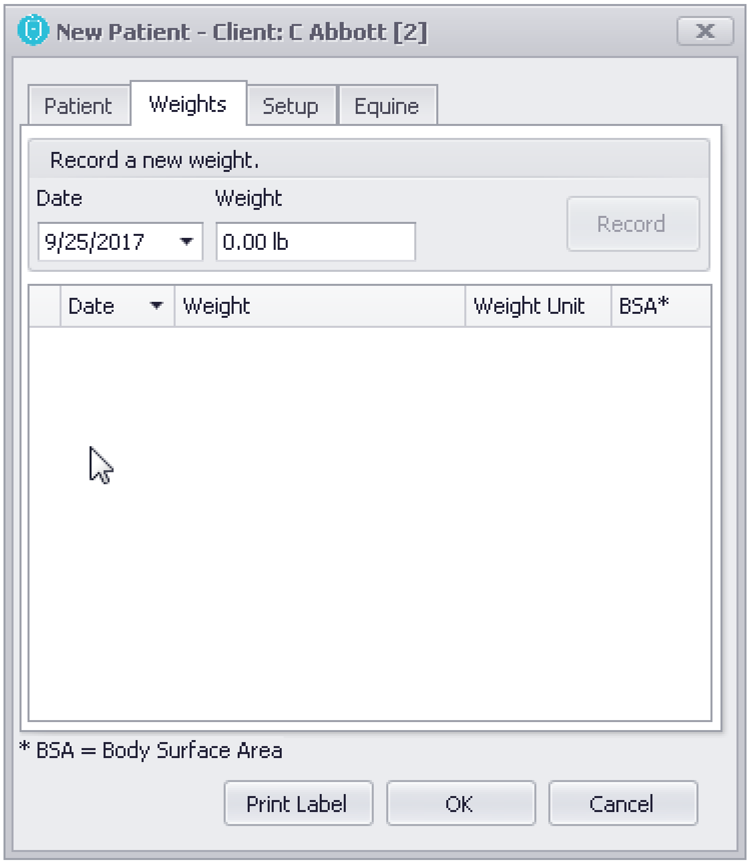
Patient

The Patient tab is where the general information about the pet is kept such as Name, new Long Name, Species, Sex, Breed, Color, Date of Birth, and Status.



Weights

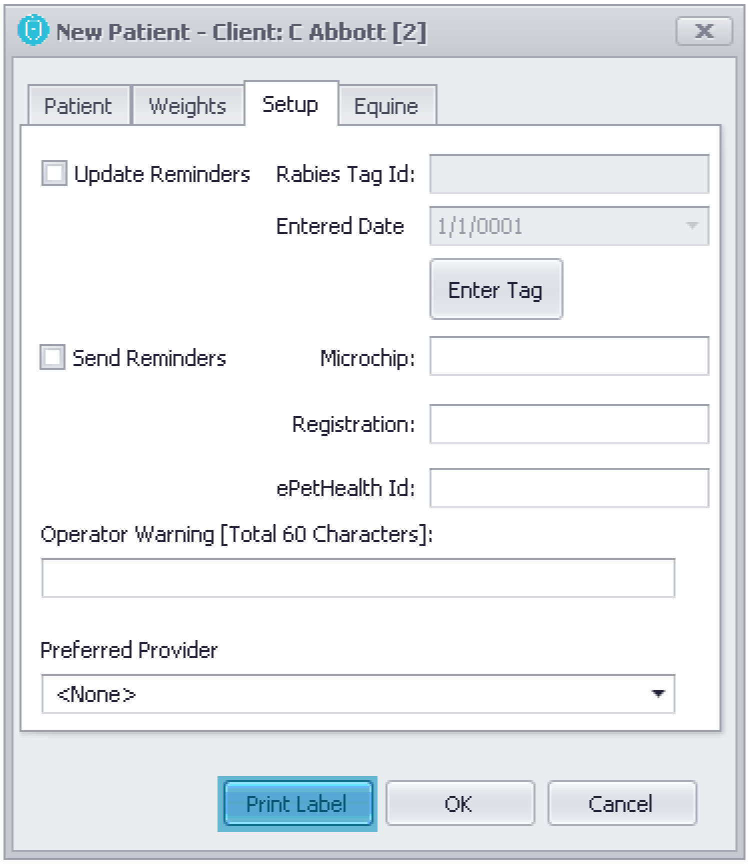
The Weights tab lists all the weights recorded for the patient. There is also the capability to add, edit, and delete weights. Weights can be backdated from this window. Body Surface Area is also displayed.



Setup

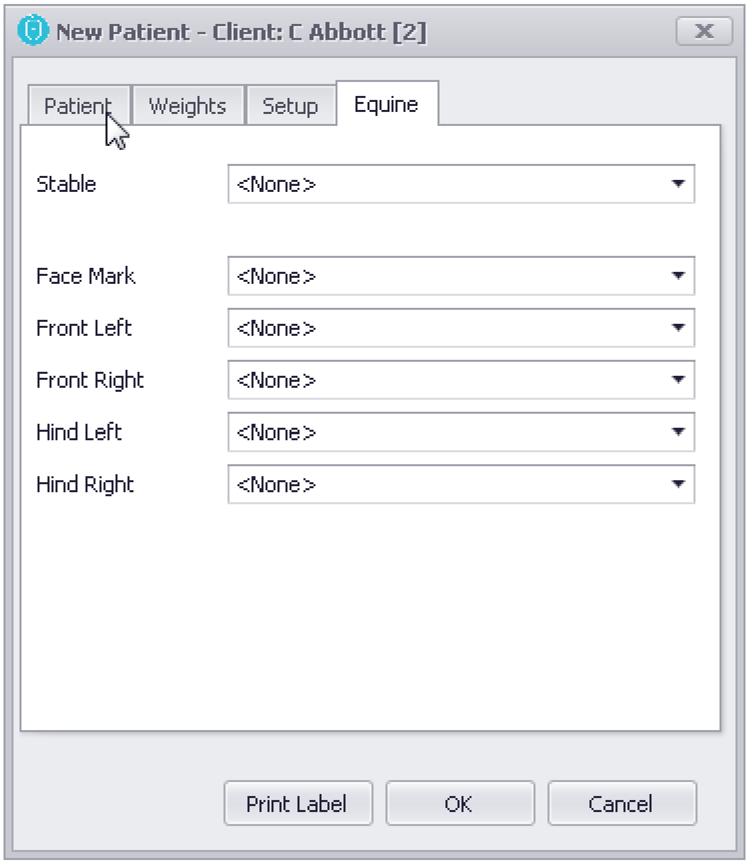
The Setup tab houses features such as patient operator warning, preferred provider, tag ID, microchip, reminder options, and ePetHealth ID.

"Print Label," located at the bottom of the screen, prints the default patient information label.



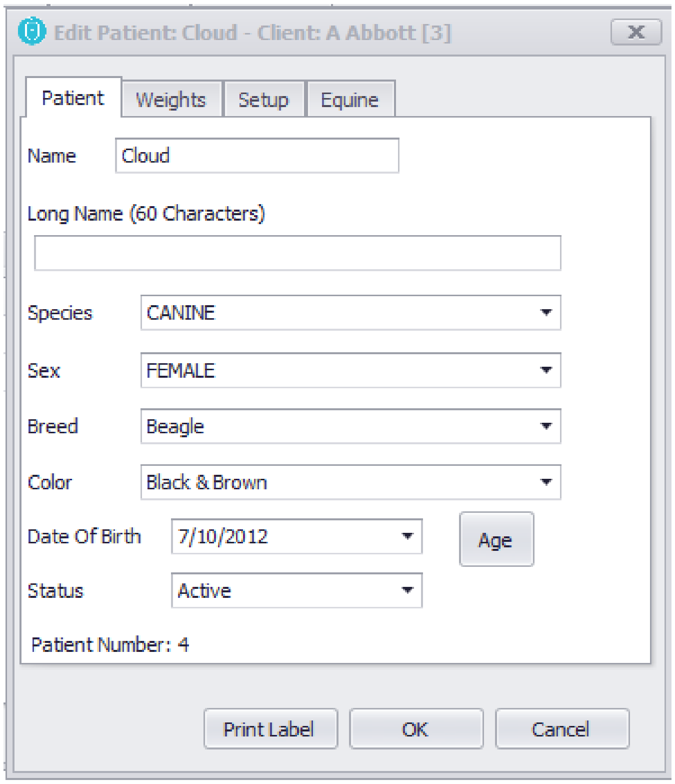
Equine

The Equine tab is where the general information regarding a horse is contained. It holds such details as where the animal is boarded, its color(s) and markings.



Edit Patient

The Edit Patient icon takes you to a screen that allows the selected patient's data to be updated. Open the edit patient window to change a patient's name or other information.



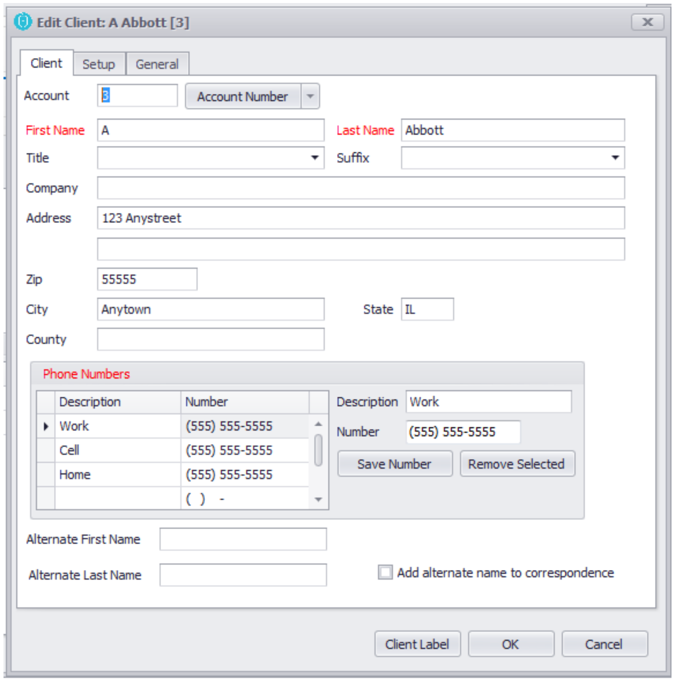
Edit Client

Edit Client allows you to edit or update the client information, as well as their setup, and general options.

Client

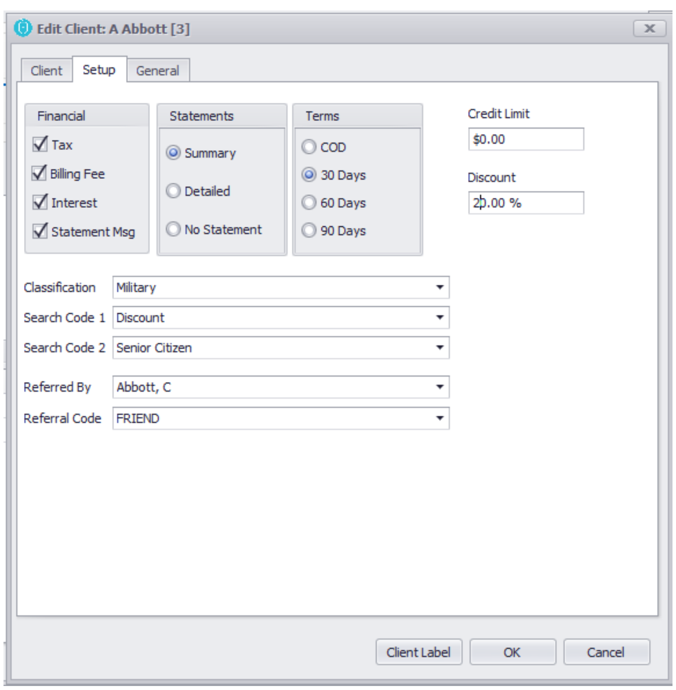
The Client tab has general information such as name, address, phone numbers, and alternate contact information.

- **There is the option to set up unlimited phone numbers, each with their own description.**



Setup

The Setup tab features Financial, Statements, Terms, Credit Limit, Discount, Search codes, Classification, and Referral information.

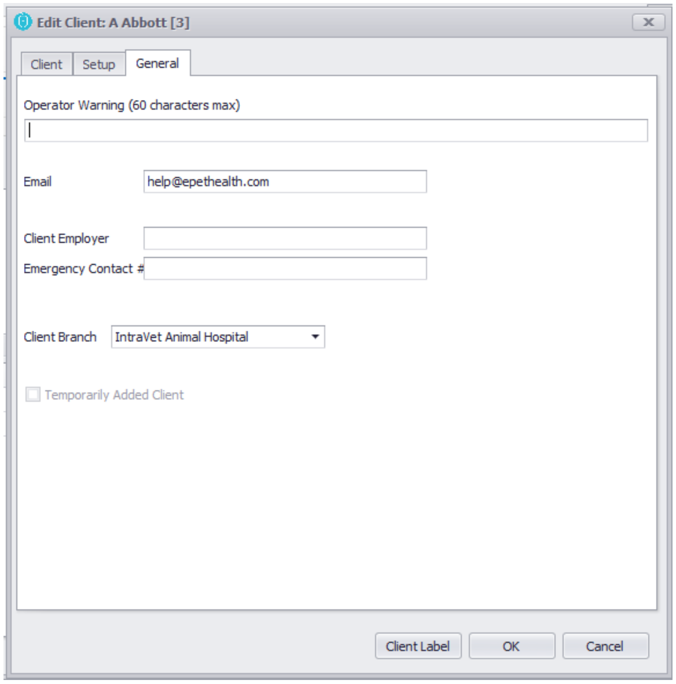


General

The General tab houses the operator warning, email, branch and other custom information depending on the Branch settings.

- **The client's Branch association can be changed by using the Client Branch drop-down and selecting the appropriate branch.**

The Client Label, located at the bottom of the screen, prints the default client information label.

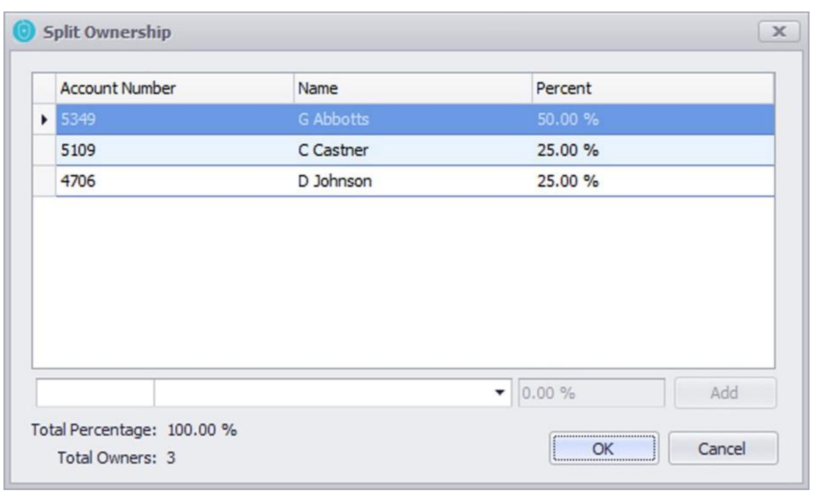


Split Ownership

Split Ownership allows multiple client accounts to share financial responsibility for the same patient. There is the capability to determine the percentage for which each account is responsible.

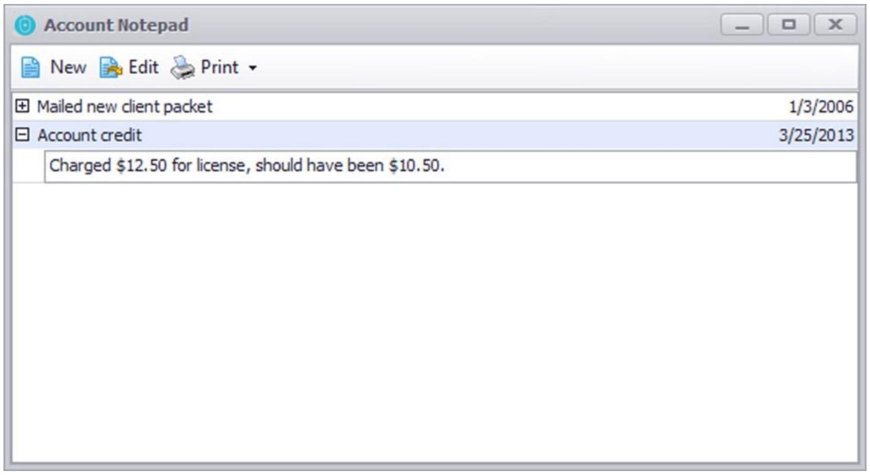
Once a client account is selected, and a percentage for that client entered, click the Add button. Repeat until all responsible parties have been added to the list with a corresponding percentage. Added percentages must total 100% to be saved. To edit or remove a line, right-click and select Edit Line or Delete Line. The OK button saves the data entered and enables the split ownership feature.

Medical History is stored under the account that split ownership is created under. Financial responsibility is recorded under transactions for each owner.



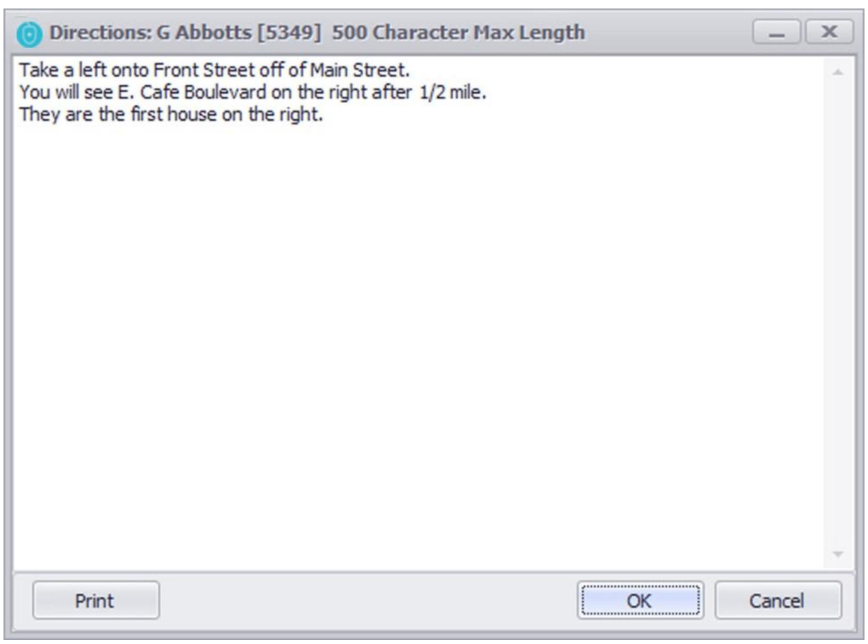
Account Notepad

Account Notepad allows you to add any notes that are special to that account. New notes can be added; previously saved ones can be edited. Notes can also be deleted as well as printed.



Direction

Direction is a window specifically for directions to a client's home or barn. An example would be for a practice that does house calls for their clients.



Email

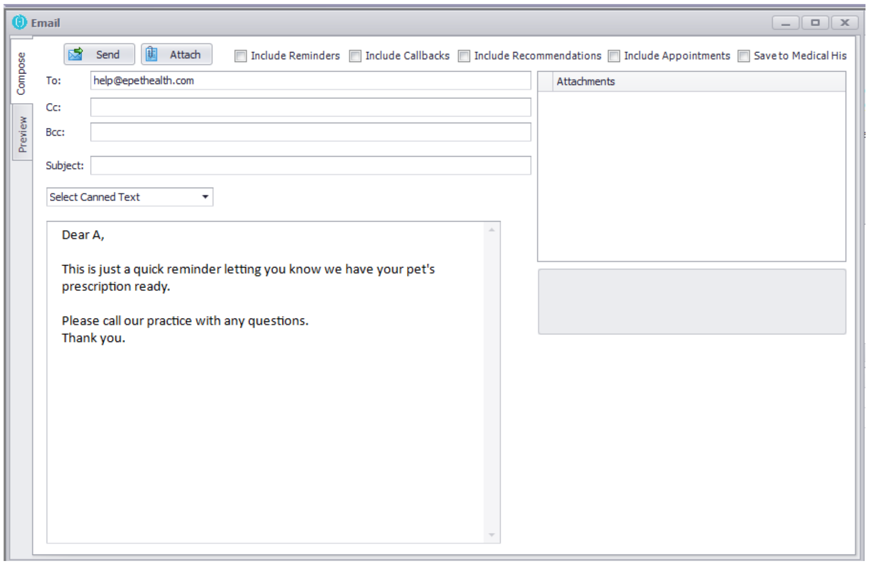
This allows an email to be sent to a client directly from IntraVet.

Compose Tab

Attachments can be added. Reminders, callbacks, recommendations and appointments can be automatically included within the email by checking the appropriate checkboxes.

You also have the option to save the email along with any attachments to the Patient's Medical History by checking the box Save to Medical His.

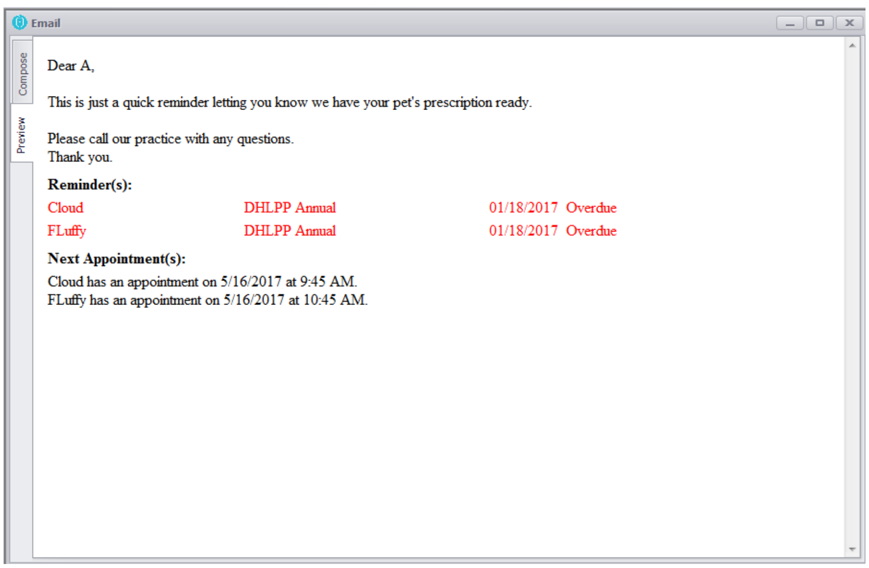
Within the email, Medical Notes Canned Text can be used or the email can be typed by hand.



Within the email, Medical Notes Canned Text can be used or the email can be typed by hand.

Preview Tab

The Preview tab allows the email to be previewed as it will appear to the recipient.



Documents

The Documents icon allows you to choose items to be printed for the client by selecting a Client, Patient, Provider, type of document and then the document itself.

Types include:

- Documents
- Labels
- Patient Certificate

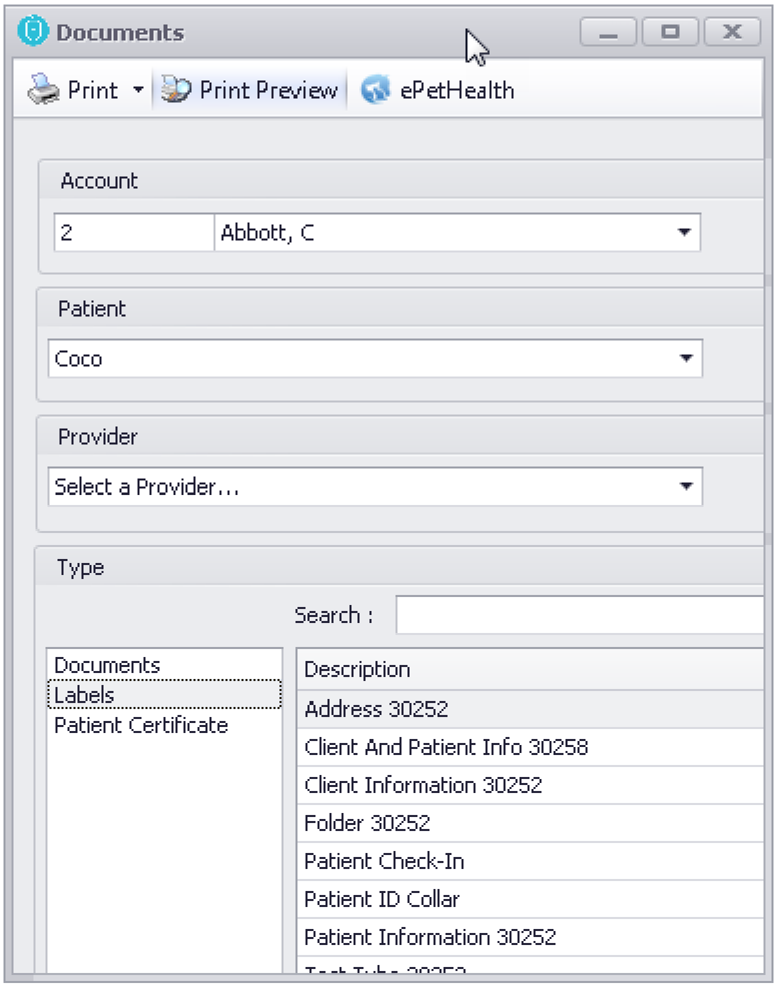
When a type is selected, the list of available documents of that type display for selection.

If you are logged into ePetHealth and click the ePetHealth button within the Documents Window, the ePetHealth Client Education Articles page will open in your web browser.

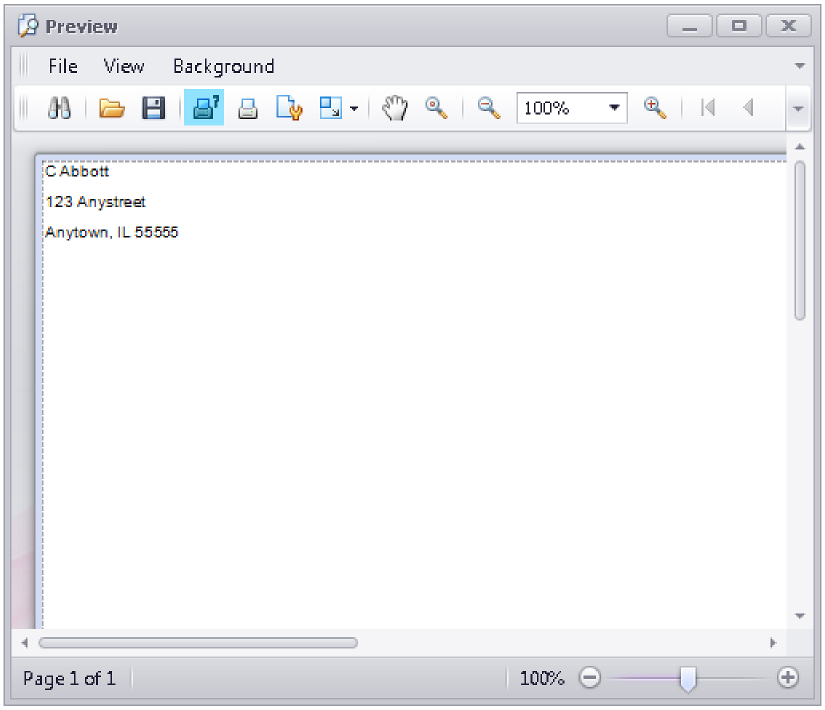
Print Multiple Copies of the Same Document

Sometimes more than one copy of a document or label is needed.

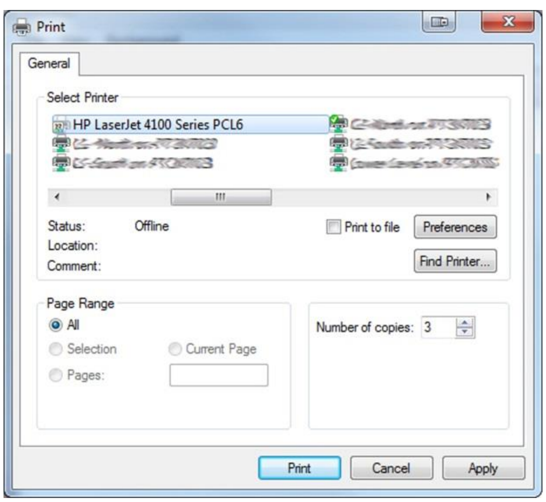
- To print multiple copies: From the Control Center, right-click on the client/patient line and go to Print | Document (or what it is you want printed).
- Select Print Preview Print Preview.



- Select the printer icon with the question mark.

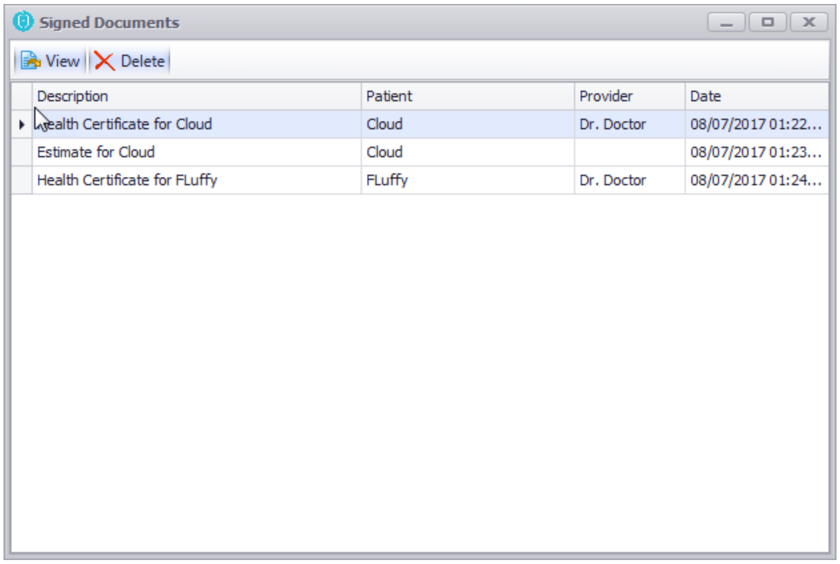


- Choose the printer where you would like the document to print.
- Enter the Number of copies.
- Click Print.



Signed Documents

This window houses all signed documents for this account. For example, you can use the Topaz Signature pad to sign for Credit Card Receipts, Estimates, Invoices, Boarding Release Form and the Health and Rabies Certificates.



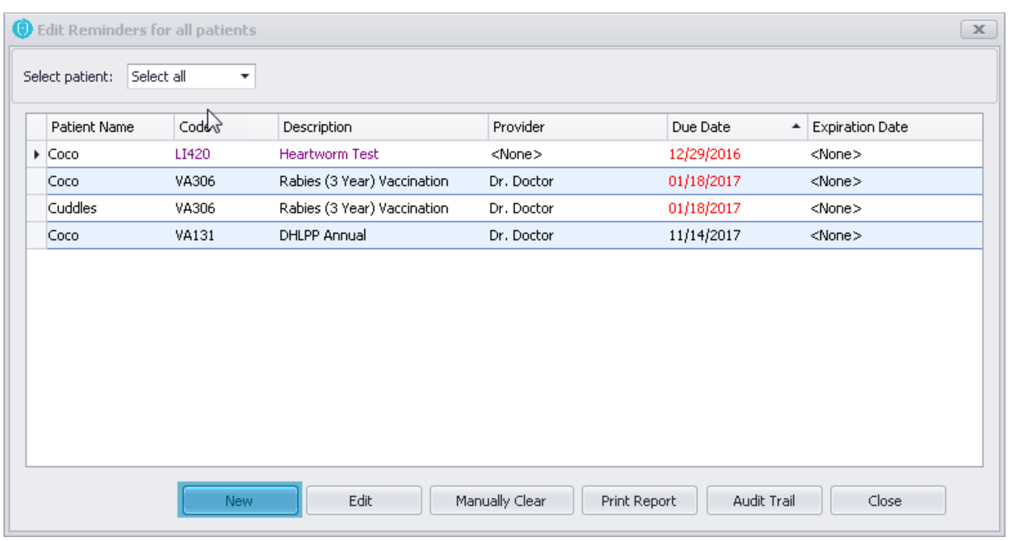
Reminders/Recommendations

This window houses all the reminders, recommendations, and callbacks for the selected patient. Reminders show in black, overdue reminders show in red, recommendations show in purple, and callbacks show in blue. This will help differentiate between the different types of items within this window.

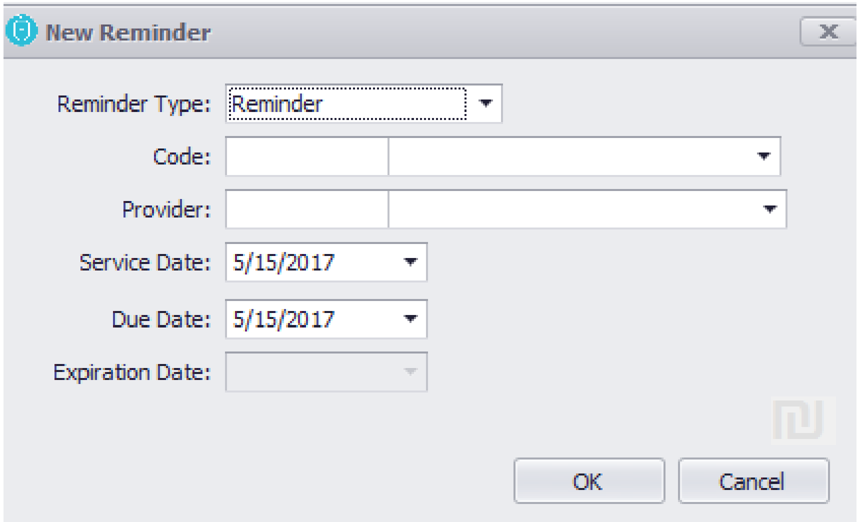
This window includes the following options:

- New

New allows the creation of a new reminder, recommendation, or callback.

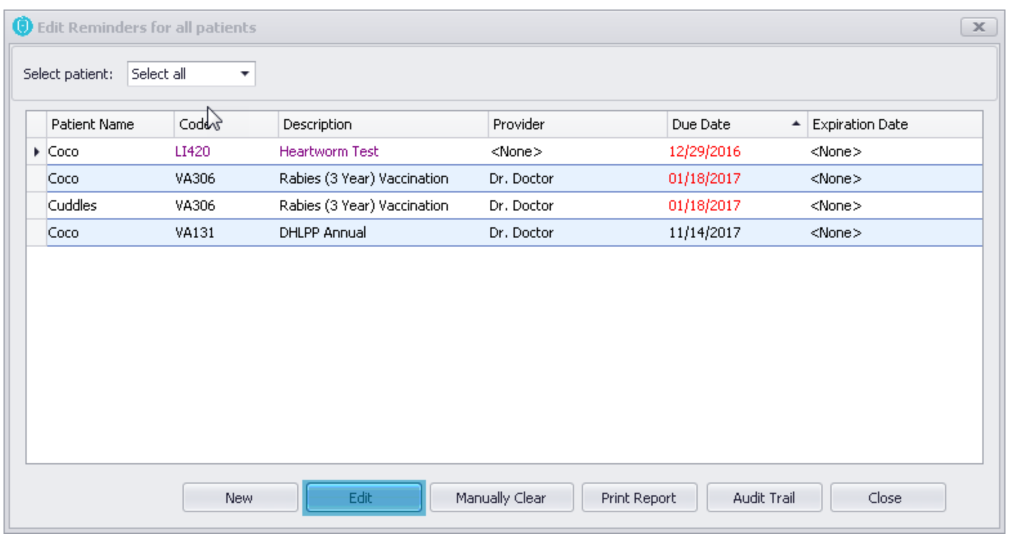


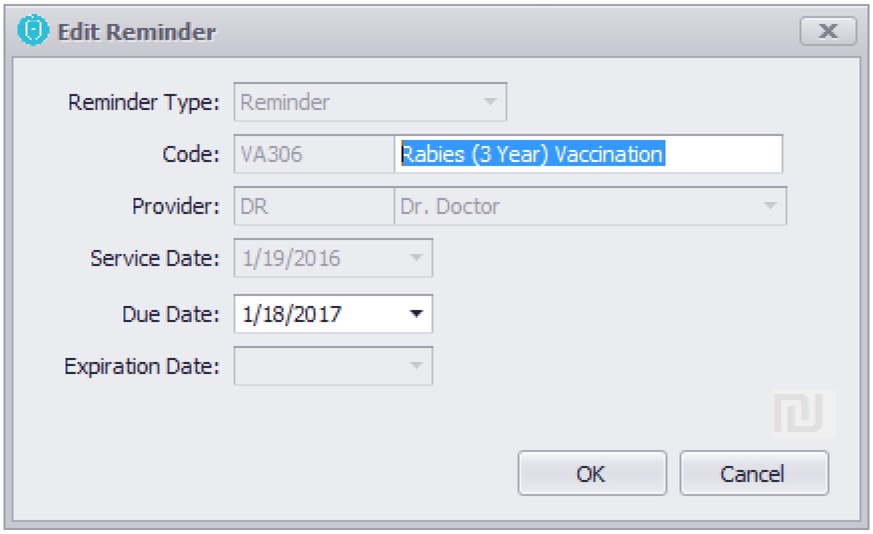
Select the reminder type, the code, the provider, service date and the due date. Click OK to save the information.



- **Edit**

Edit allows the selected reminder, recommendation, or callback code to be edited. The code description and the due date can be changed.



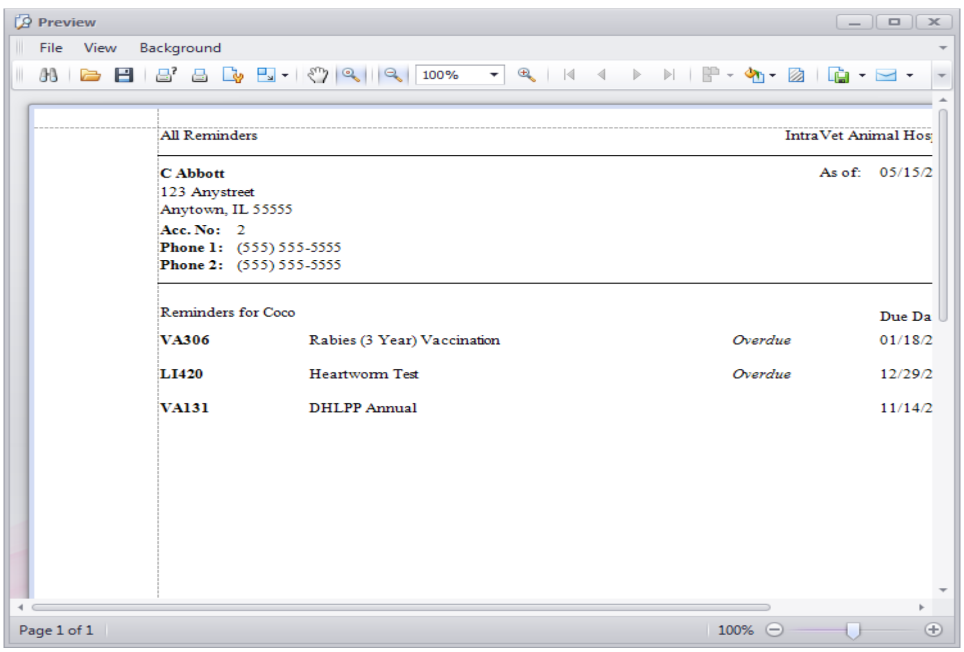


- **Manually Clear**

Select the code to Manually Clear the reminder. Once the reminder is cleared, you will have the option to Undo Manually Clear.

- **Print Report**

Print Report will print a report of the reminders, recommendations, and callbacks for the selected patient.

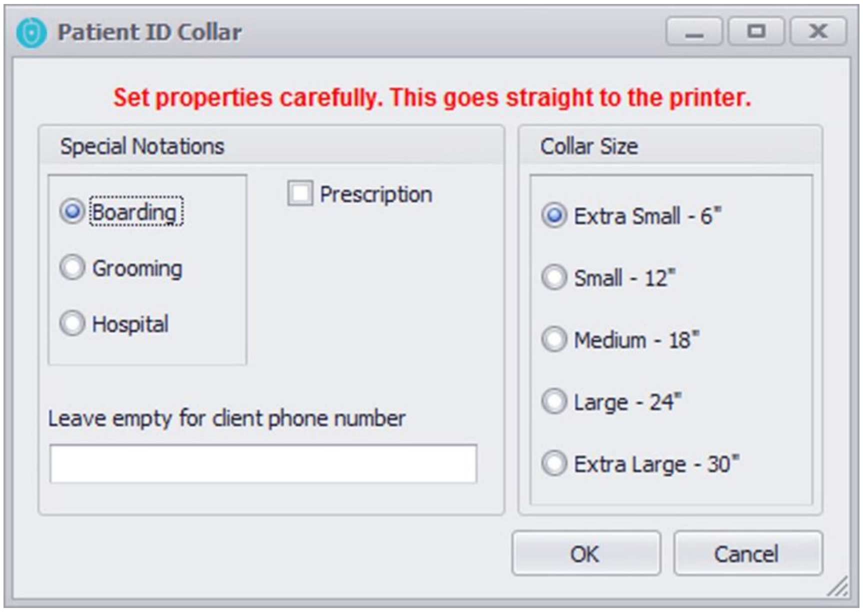


- **Audit Trail**

The Audit Trail prints a list of all the reminders the selected patient has ever had. It details out what code generated the reminder, the provider attached to the code, the date it was created, the reminder due, if it was cleared, the number of recalls it had in a reminder search, if it was a manually created reminder, and the date it is due.

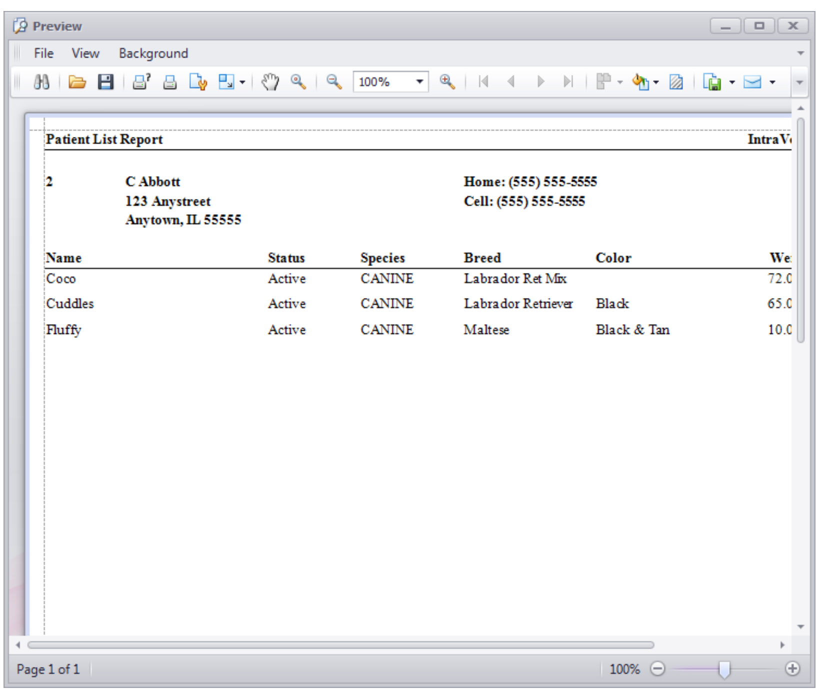
Print ID Collar

The Print ID Collar icon provides the option to print Pet Detect ID collars. It allows for several collar sizes as well as special notations.



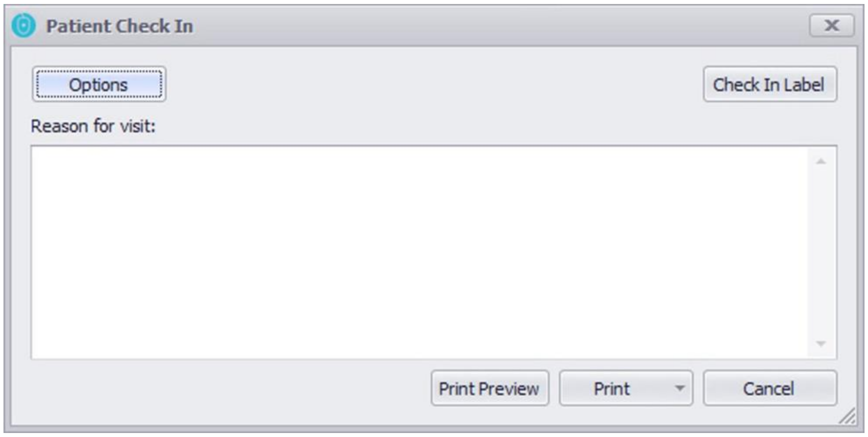
Print Patient List

The Print Patient List icon prints a list of patients for the client, and will note if they have a patient operator warning.

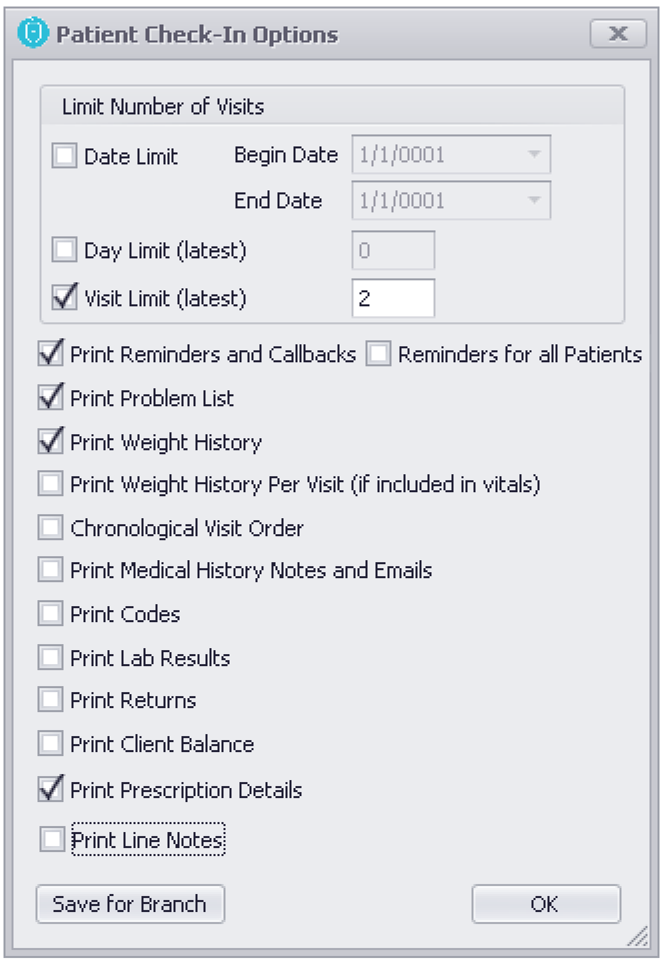


Patient Check-In

The Patient Check-In icon allows a patient check-in report and label to be printed.



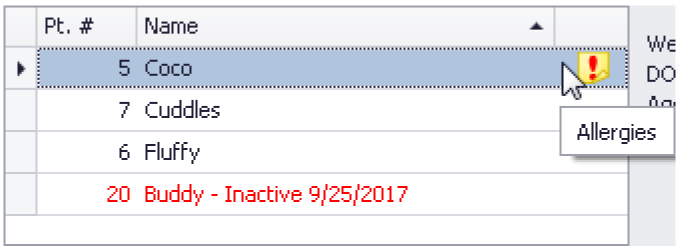
Click the Options button which allows for determining the number of visits and selection of what is to be printed.



Client Account Management Screen

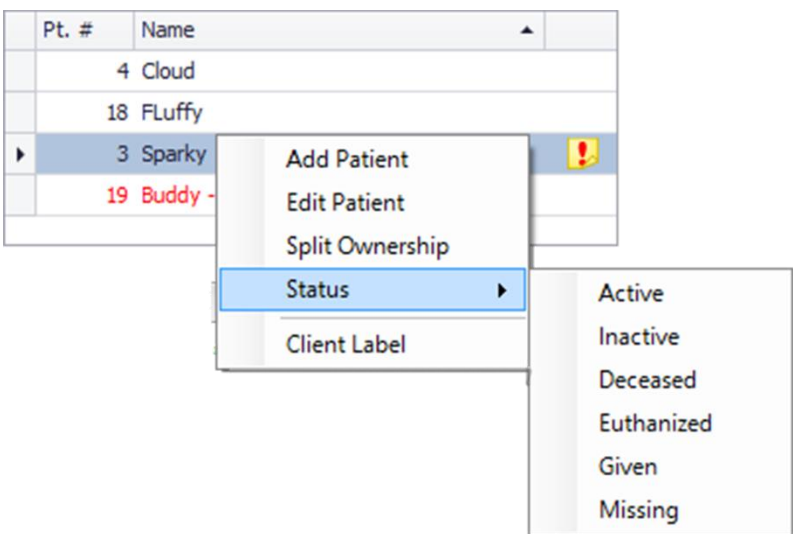
The box on the upper left side of the Client Account Management Screen holds that client's list of patients. This list holds both active and inactive patients. Black means active and red inactive. Inactive patients will display at the bottom of this list.

If the patient has an operator warning a red exclamation point will show on the right side, in this box. Hold the mouse over the red exclamation point and the warning will appear.



Right-click in the patient list to choose between the following options:

- Add Patient
- Edit Patient
- Split Ownership
- Status
- Client Label

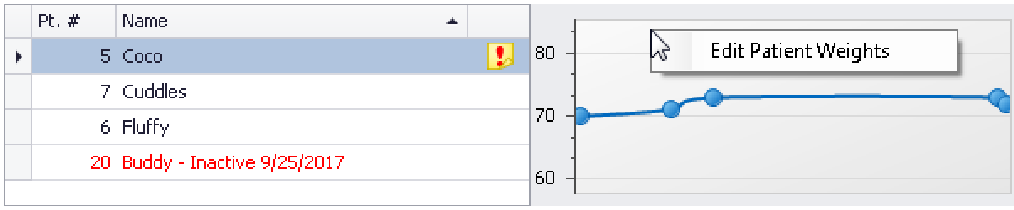


Patient General Overview

When a patient is selected, the weight chart and a general overview are provided of the patient's information to the right of the patient list. Items such as the species, breed, sex, color, microchip #, rabies tag #, weight, date of birth, status, patient's picture (if one is uploaded for that patient) and the client account balance will appear.

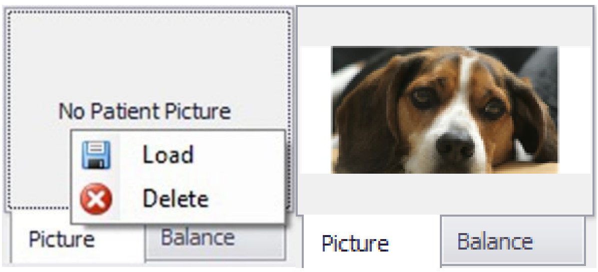
Patient Weight

To edit the patient's weight from the general Client Account Management screen, right-click in the weight graph and then choose Edit Patient Weights. This window allows you to edit an existing weight, add a new weight, or even backdate a weight entry.



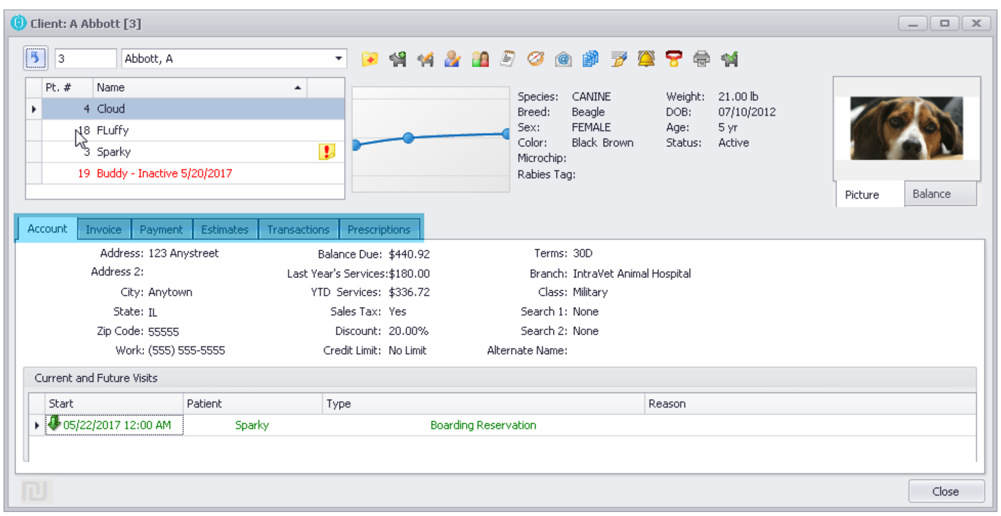
Patient Photo

A patient's photo can easily be uploaded. Right-click in the picture pane and choose Load. This will allow you to browse your machine to locate a patient photo, and upload directly from there.



The bottom portion of the Client Account Management screen is separated into 6 tabs:

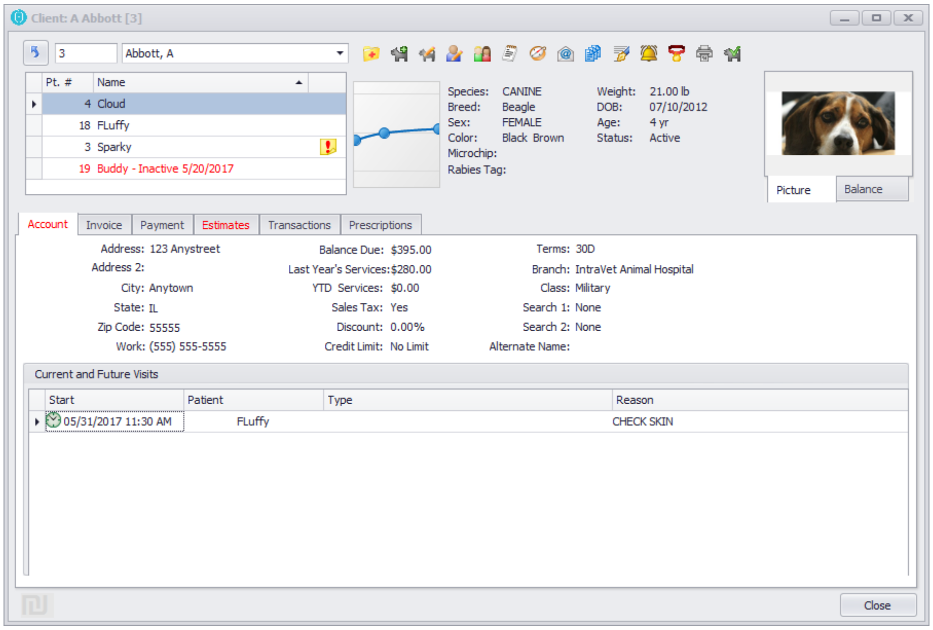
- Account
- Payment
- Transactions
- Invoice
- Estimates
- Prescriptions



Access Tabs

Account

When selected, the Account tab shows the client's current account balance as well as any current and future visits and boarding reservations.



Invoice

The Invoice tab is what you use to invoice clients if you do not want to create a visit (for example, if the client is just coming in to purchase food). In this instance you would not need all the additional features the visit offers (see Visits/Invoices).

The date listed on the top left-hand side is the invoice date. This can be backdated if needed.

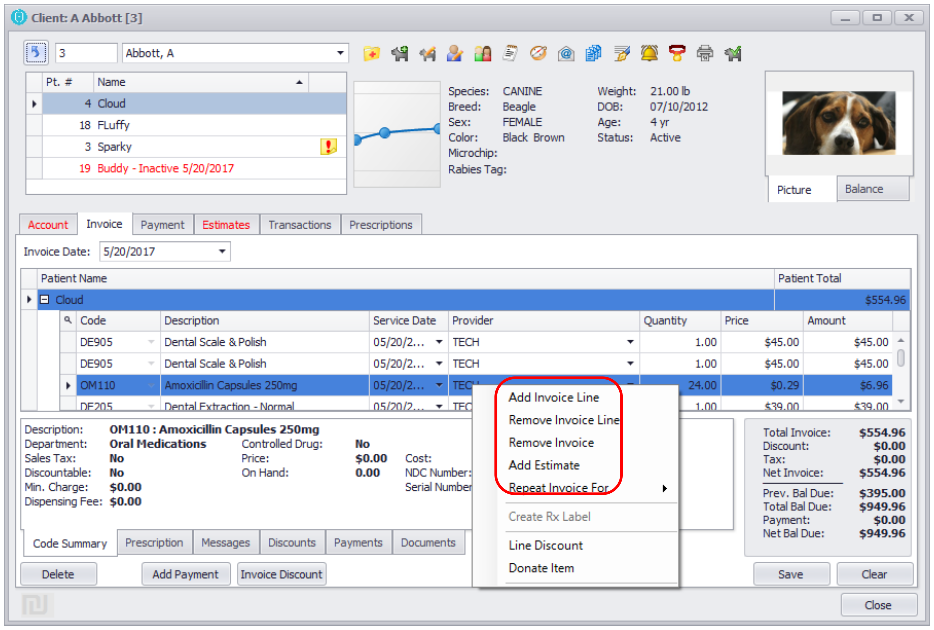
When in the invoice screen, make sure the correct patient is selected in the patients list at the top left of the client's account screen. Patients can be added and changed from inside the invoice screen, as needed. Multiple patients can be invoiced on one invoice.

Right-click and choose from the following options:

- Add Invoice Line – to add a new procedure, inventory, or diagnosis code to the invoice.
- Remove Invoice Line – to delete the selected line item.
- Remove Invoice – to delete the entire invoice for that client.
- Add Estimate – brings up the estimate tab and allows you to add a saved estimate or estimate template to the invoice.
- Add Line Note – to add a line note to the invoice item (option is only available if it was checked in the General Branch Setup).

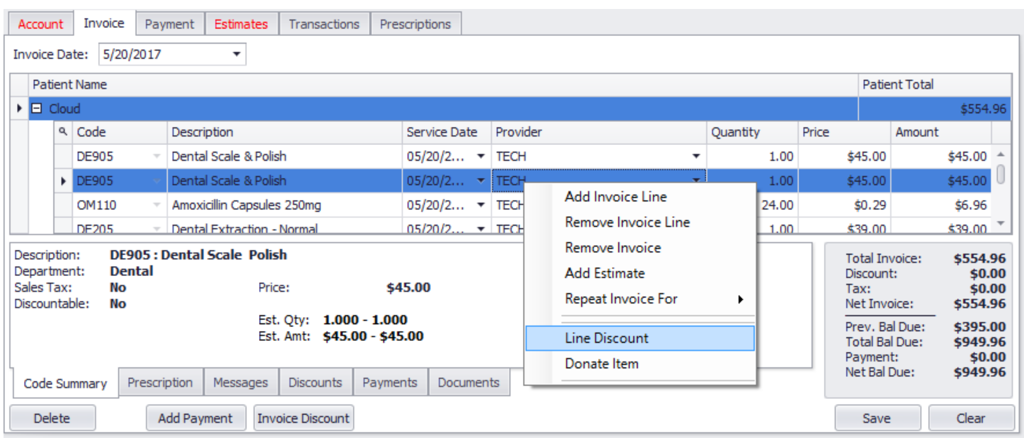
There is drag and drop capability.

- Press the left mouse button down over the code (do not release the click (mouse)).
- Drag to the desired location.
- Release the click (mouse). This will move that item into the desired location.



Line Discount

Click the Line Discount option – It allows a discount to be applied to the selected line item within the invoice. You can set up Discount Type Codes to be applied to invoices. These Discount Type Codes are traceable to see how often they are used and how much money was discounted by type.



The basic code information is supplied within the apply discount window. Select a discount type if desired. These can be set up in Setup | General Codes | Discount Types.

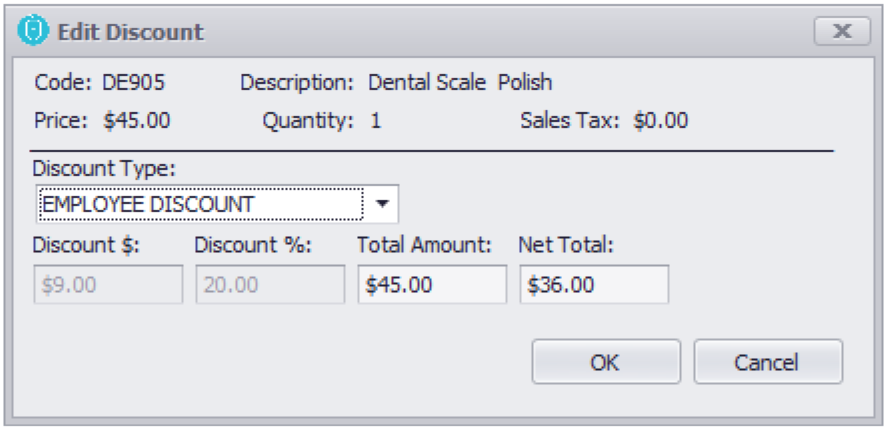
To Manually Discount:

- Choose whether to apply a discount by:
  - Dollar Amount, or
  - Percentage.

  After a discount amount is selected, the total amount and the net total will show. The total amount is the original price of the item and the net total is the total amount minus the discount amount. This is what the client is charged for the discounted item.
- Click OK to apply the discount to the line item.

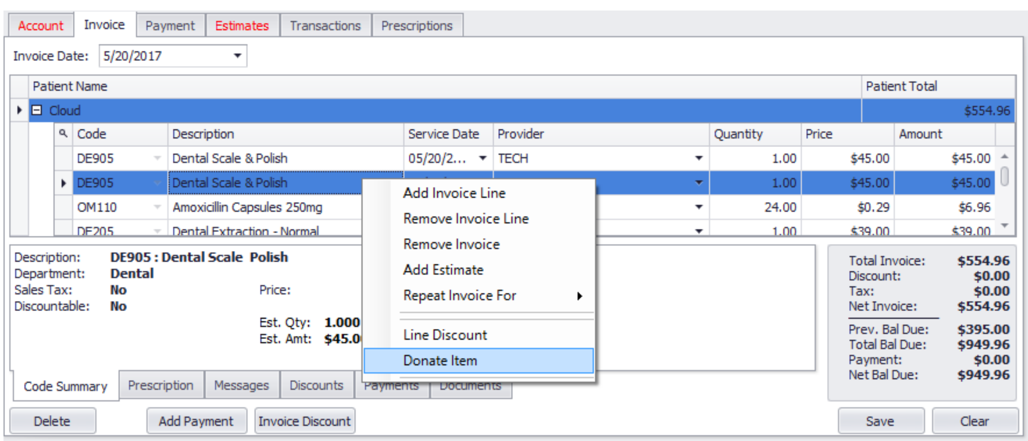
To use a Discount Type Code:

- Select the discount type code. It automatically applies that discount to the invoice. It keeps track of the discounted items in the discounts tab, at the bottom of the invoice tab.

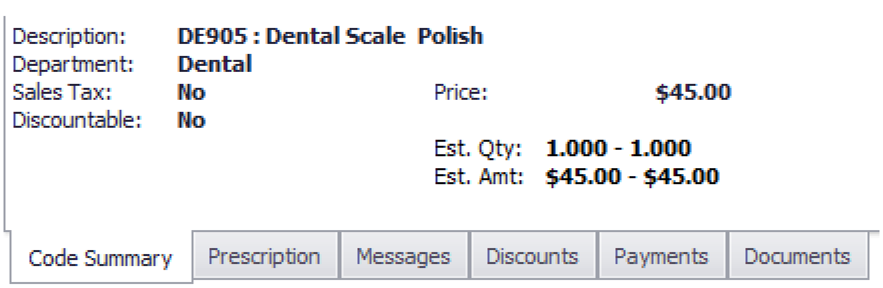


Donate Item

Items can be selected for donation. To donate, right-click on the line item and select Donate Item. It applies a 100% discount to the item and keeps track of these items in the discounts tab at the bottom of the invoice tab. These items are also being tracked within the Discounts Accounting report.

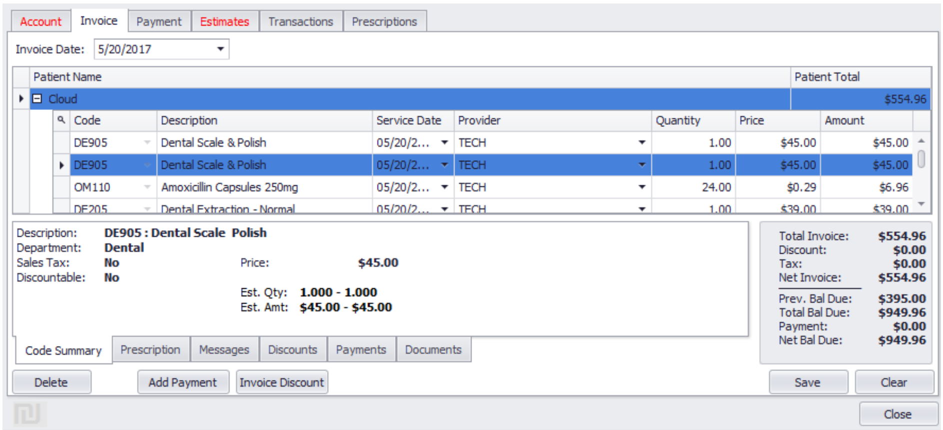


The Invoice tab has 6 additional tabs at the bottom of the screen which allow you to view and edit specifics to the current invoice for the client.



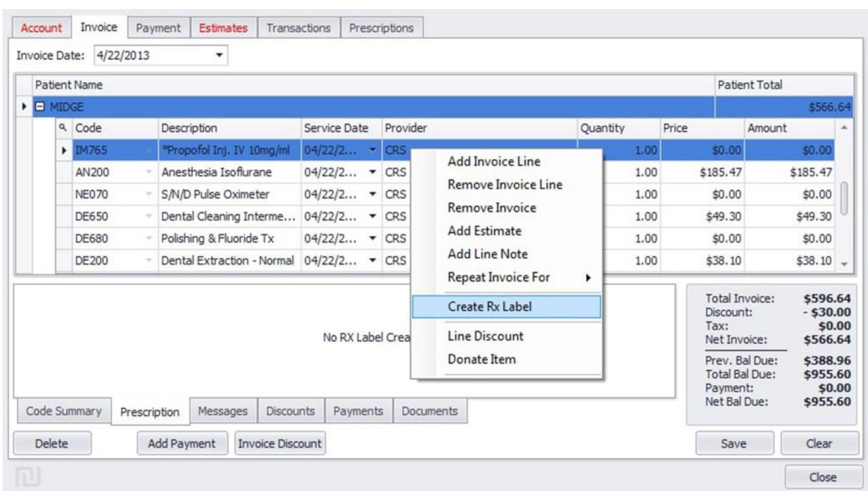
Code Summary

Code Summary provides the summary of the code that is selected within the invoice.



Prescription

The Prescription tab shows the prescription label information for the selected invoice item (if the line item selected is set up to create a prescription label). This is also where any changes to the prescription label information would be made. To create an Rx Label, right-click on the line item and select Create Rx Label.



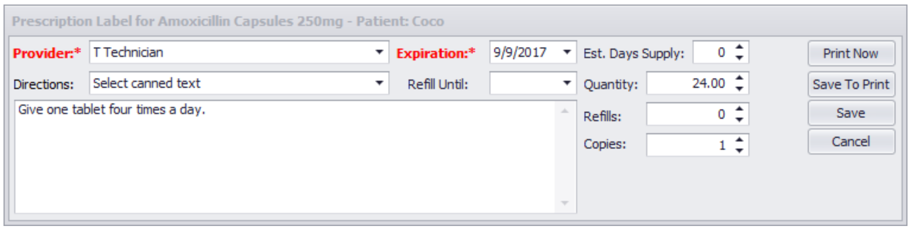
The Provider must be selected as well as the Expiration date. Additional information included:

- **Directions**
- **Refill Until**
- **Est. Days Supply**
- **Quantity**
- **Refills**
- **Copies**

There are options to:

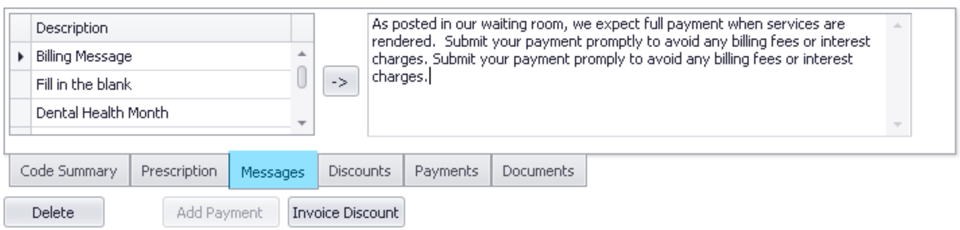
- **Print Now – this prints the label immediately.**

- Save To Print – prints the label when the invoice is permanently saved and printed.
- Save – will not print a label at all, but it will save the label information to the patient's medical history.
- Cancel – closes without saving.



Messages

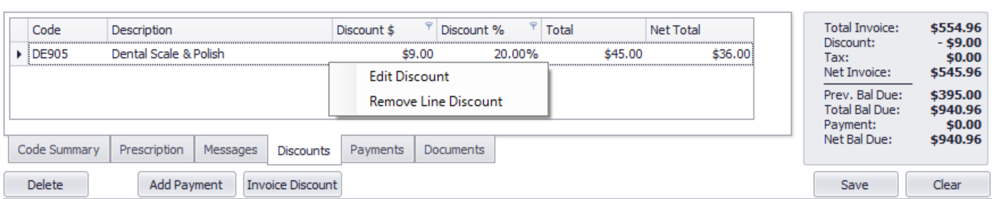
This tab allows a message, or multiple messages, to be added to the invoice. Invoice message codes that have been set up in your system can be added and edited or a freeform message may be typed.



Discounts

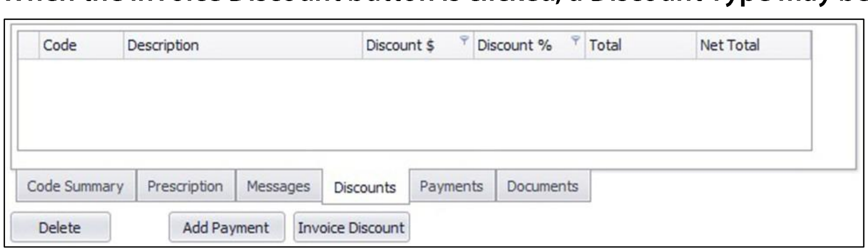
The Discounts tab shows the discounts and donations applied to the invoice.

Right-click allows the applied discounts to be edited and/or removed.



Invoice Discount

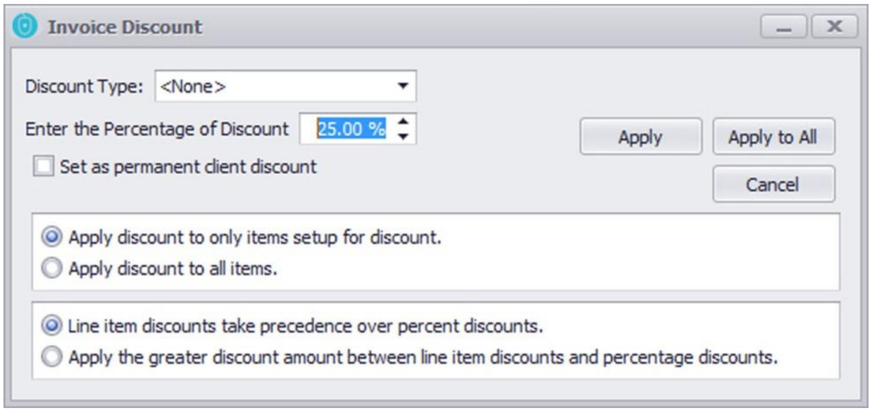
When the Invoice Discount button is clicked, a Discount Type may be determined.



If a discount percentage is established, it may be Set as a permanent client discount if the box is checked. The discount may be applied to this invoice only or all current invoices for this client. Other choices include:

- Apply discount to only items set up for discount.
- Apply discount to all items.

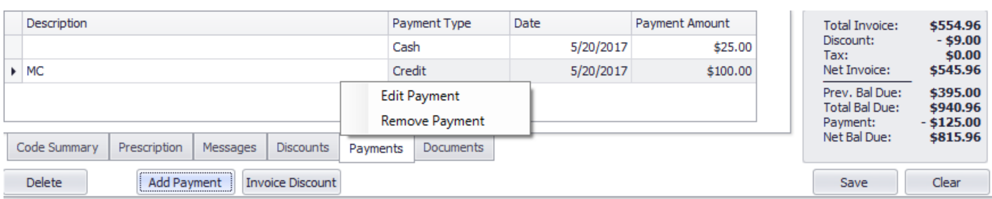
- **Line item discounts take precedence over percent discounts.**
- **Apply the greater discount amount between line item discounts and percentage discounts.**



Payments

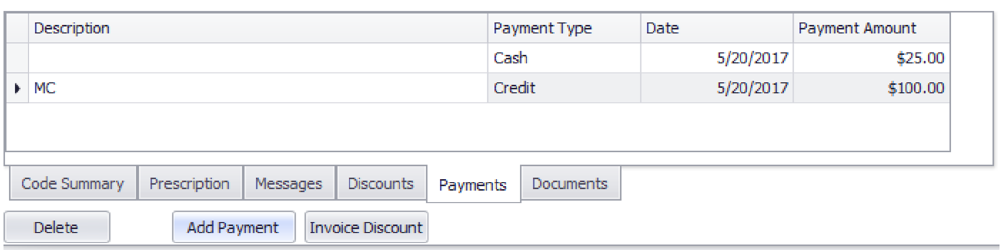
The Payments tab shows the applied payments within the open invoice.

Right-click allows the payment to be edited or removed.



Add Payment

The Add Payment button allows a payment to be added to the invoice.



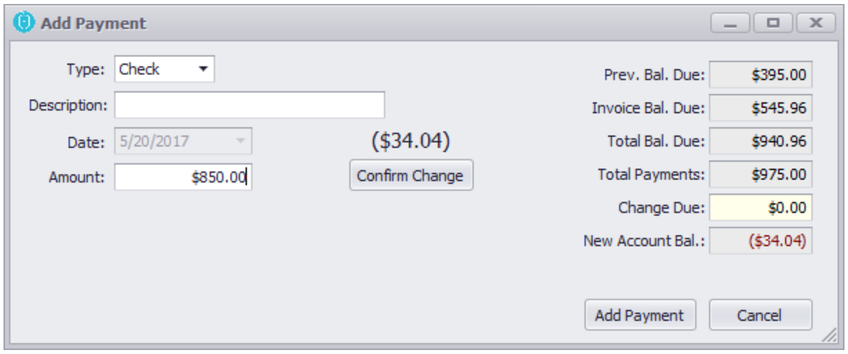
There is a branch drop-down to assign the payment to a specific branch (if there is more than one branch set up).

It has a description, type, and amount fields that can be filled in with the appropriate information.

Click the Add Payment button to apply multiple payment types within this window as well as multiple entries for the same payment type, such as two separate card payments.

The Confirm Change button implies that the customer wants change back. If the Confirm Change button is not clicked, the customer will get a credit on their account for the amount of the change.

Processing Card Payments is preceded by a screenshot:

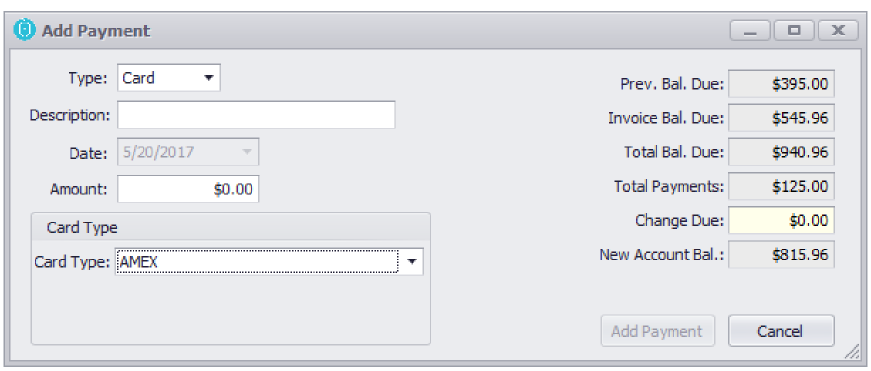


Processing Card Payments

IntraVet integrates with X-Charge, an OpenEdge product, which allows offices to process credit cards.

To accept a credit card payment *using X-Charge*, use the following instructions. These instructions are used with a card that is swiped or a card that is dipped. A dipped card refers to a card that is processed using the chip instead of the magnetic strip.

- Change the payment Type to Card.
- Enter a dollar amount.
- Set the Card Type by clicking on either Credit or Debit.
- Select the drop-down arrow next to Card Type to display card names. Double-click on a card name.
- Click Add Payment.
- Select either Print / Save or Save.
- Swipe the card.
- Payment should process automatically after swiping.



To add a keyed card payment:

- Change the payment Type to Card.
- Enter a dollar amount.
- Set the Card Type by clicking on either Credit or Debit.
- Select the drop-down arrow next to Card Type to display card names. Double-click on a card name.
- Click Add Payment.
- Select either Print / Save or Save.
- Manually key in the card number and other required fields.

- Click Process.

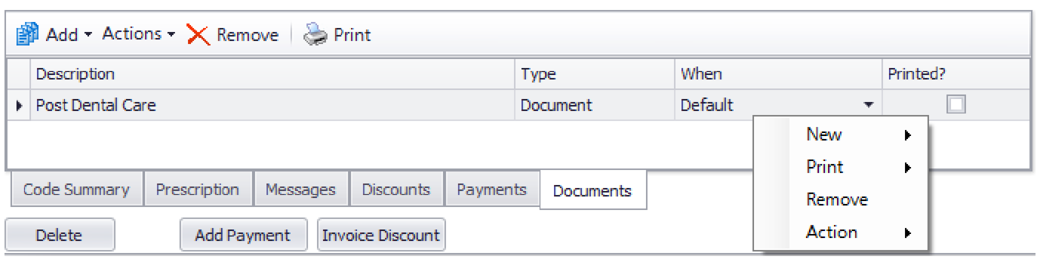
To accept a credit card payment *using another card processor,* use the following instructions.

- Change the payment Type to Card.
- Enter a dollar amount.
- Set the Card Type by clicking Non-Merchant.
- Select the drop-down arrow next to Card Type to display card names. Double-click on a card name.
- Click Add Payment.
- Click Yes on the “Continue?” prompt.
- Select either Print / Save or Save.

Documents

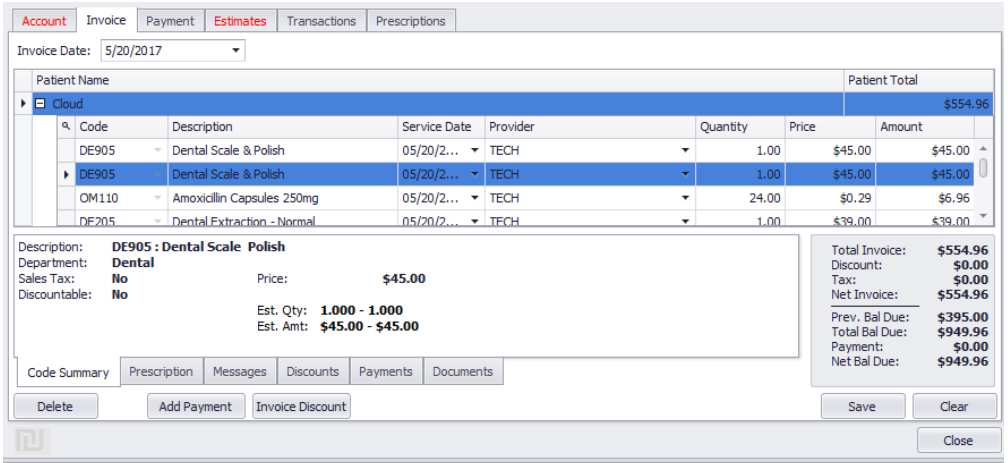
The Documents tab shows the documents set up to print when certain codes are added to the invoice.

- Check to indicate the document has already been printed.
- Right-click to add a new document, label, certificate, routing sheet or Check-In Report to print with the invoice (if it is not attached to a code).
- Right-click and select Print to print the document now or Action to set it to print automatically at check-in or check-out.
- Right-click and select Remove to remove a document from the list.



Delete

When the Delete button is selected, it will delete the selected line item in the invoice. There will be no confirmation or warning.



Payment

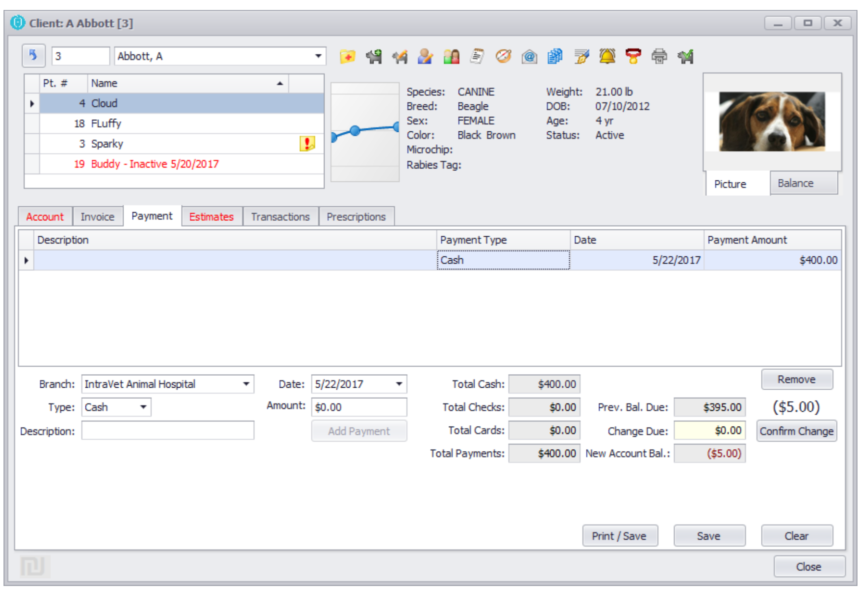
The Payment tab on the Client Account Management screen applies a customer's payment to their current account balance.

- **The branch assignment, description, type, date, and amount can all be edited.**
- **Multiple types of payments can be added to one overall payment and multiple payments of the same type can be added.**

The Confirm Change button implies that the customer wants change back. If the Confirm Change button is not clicked, the customer will get a credit on their account for the amount of the change.

If the Remove button is clicked it will remove the highlighted payment. There will be no confirmation or warning.

If the Clear button is clicked it will remove all payments. There will be no confirmation or warning.



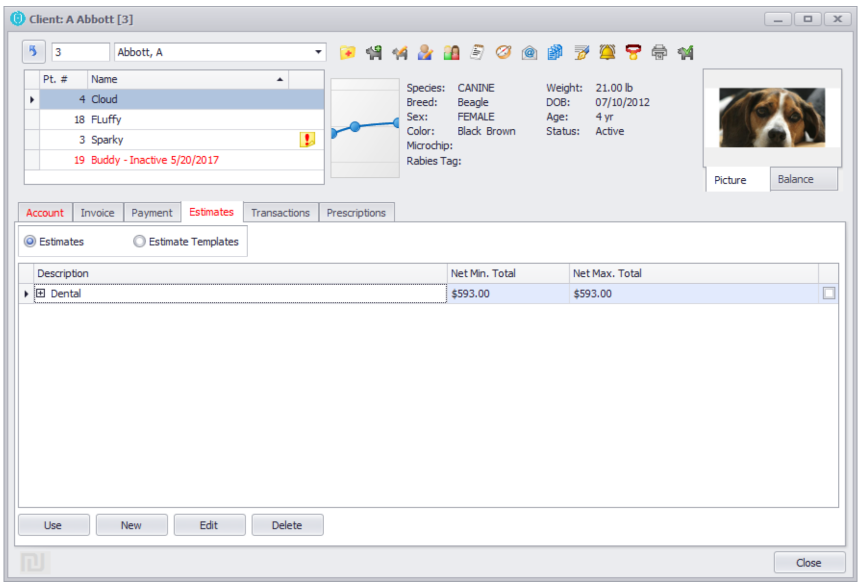
Estimates

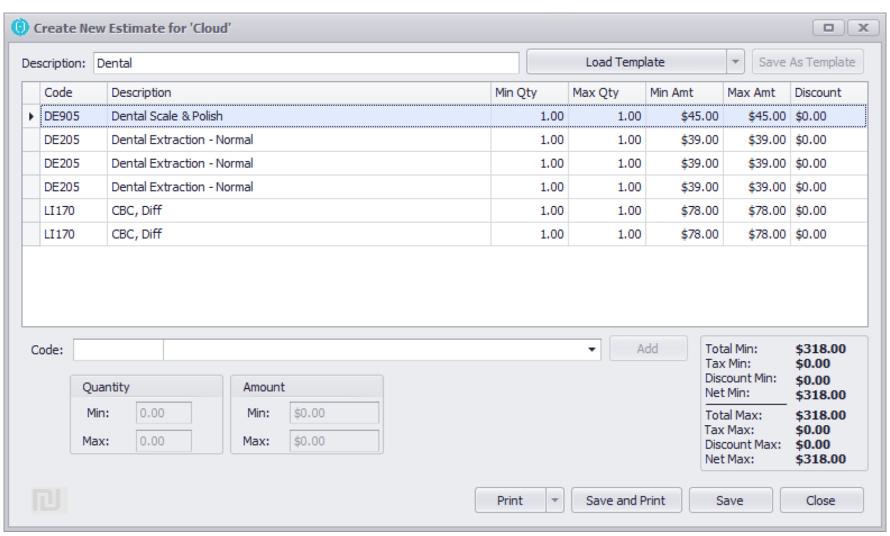
The Estimates tab allows a look at previously saved estimates for a patient. From there a new estimate can be created either from scratch or by using an estimate template. Estimate templates can also be created within this window.

The estimates tab shows red when the patient has a saved estimate.

There are two options to choose from, at the top of the estimates tab.

- Estimates – Shows the previously saved estimates for that patient.
- Estimate Templates – Shows the list of estimate templates that have been created. These can be selected and edited for the current patient's needs.



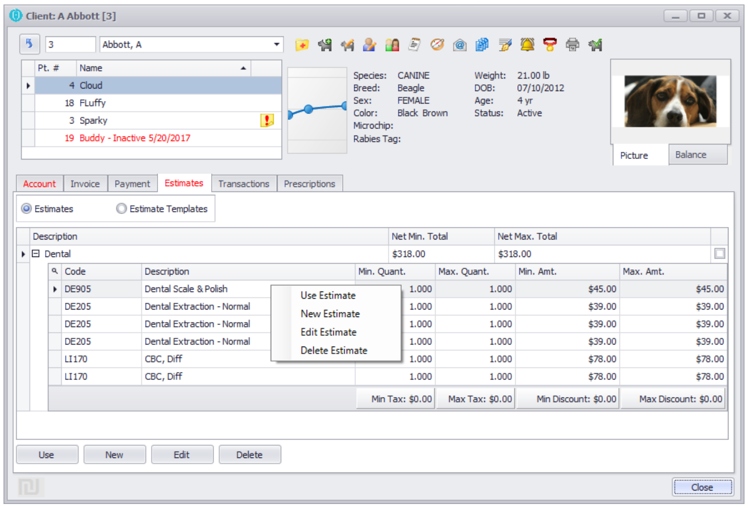


Note: Items on the Estimate can be reordered by dragging the item and dropping it in the desired location.

There are 4 options to choose from at the bottom of the estimates tab. These options are also available by right-clicking in the estimates screen.

- Click Use (Estimate) to load the selected estimate or estimate template into the invoice screen.

- Click New (Estimate) to create a new estimate for the selected patient.
- Click Edit (Estimate) to edit the selected estimate or estimate template that had previously been saved.
- Click Delete (Estimate) to permanently remove the selected estimate for the patient or estimate template from the system.



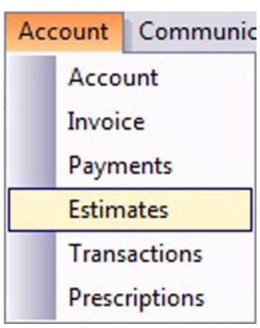
Estimate Discount

An Estimate Discount allows you to apply discounts to line items within estimates.

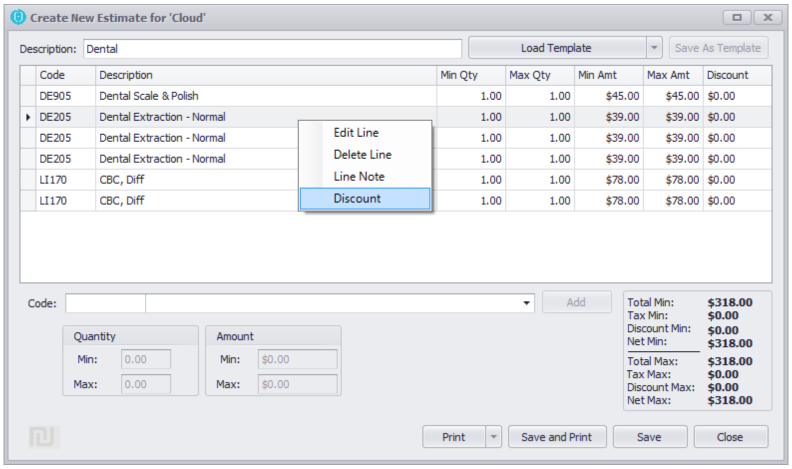
Discounts given to clients are tracked within the system to provide you with accurate reporting. Your practice has total control over how discounts are applied to clients.

To apply an Estimate Discount:

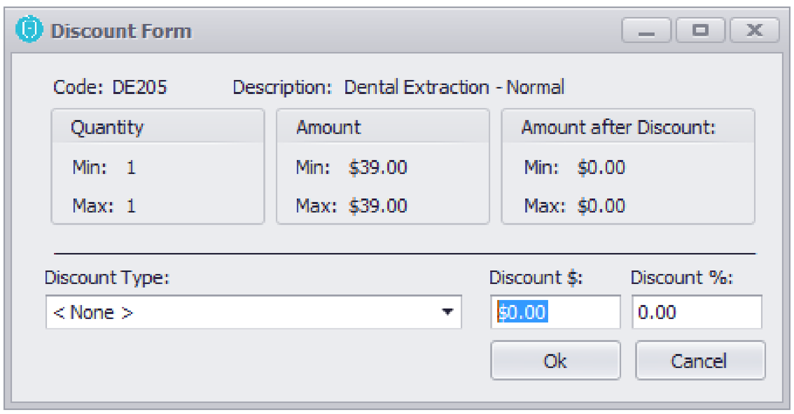
- Go to Account | Estimates.



- Select a client.
- Click the Estimates tab.
- Right-click in the Description area and choose New Estimate.
- Add the code and description.
- Right-click on the estimate line item for which you would like to apply a discount.
- Select Discount.

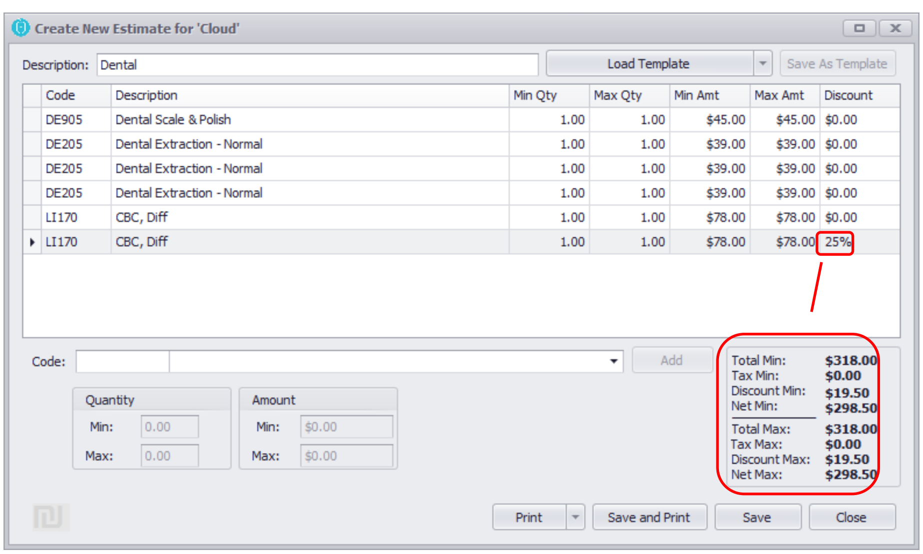


A Discount Form window will appear.



The screen lists the selected Code, the code Description, Quantity, Amount, and the Amount after Discount. You can choose a Discount Type, add a Discount $ (flat discount amount), or add a Discount %. Only one of these options can be selected per line item.

There is a discount column that lists the discount applied to the line item.



At the bottom right side of the Estimate screen you can find the following information:

- Total Min, Discount Min and Net Min
  (Total Min – Discount Min = Net Min)
- Total Max, Discount Max, and Net Max
  (Total Max – Discount Max = Net Max)

To edit a discount, right-click on the Code and click Discount. The current discount will be listed in the Discount Form (see above). It can be edited as needed.

Line item discounts can also be applied to Estimate Templates. When you are on the Estimate tab:

- Select Estimate Templates at the top portion of the window.
- Select an existing Estimate Template and click Edit.

You can follow the same steps listed above and apply a line item discount to the Estimate Template. Be sure to:

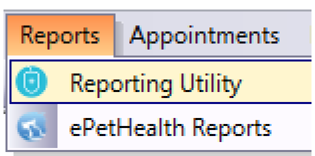
- Click Save to save your changes into the template.

Discounts are not applied to an item until the invoice is saved within the system.

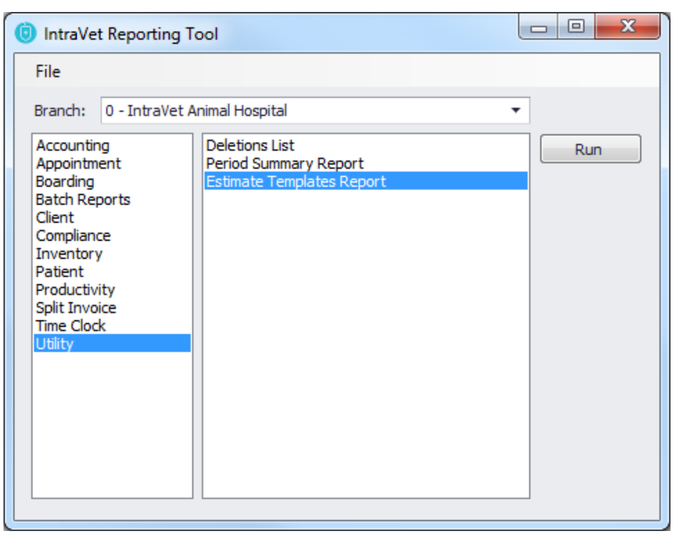
A discount cannot bring the code below a zero-selling price.

To view discounts for line items within an Estimate Template to which discounts have been applied, run the Estimate Templates Report. To do this:

- Go to Reports | Reporting Utility.



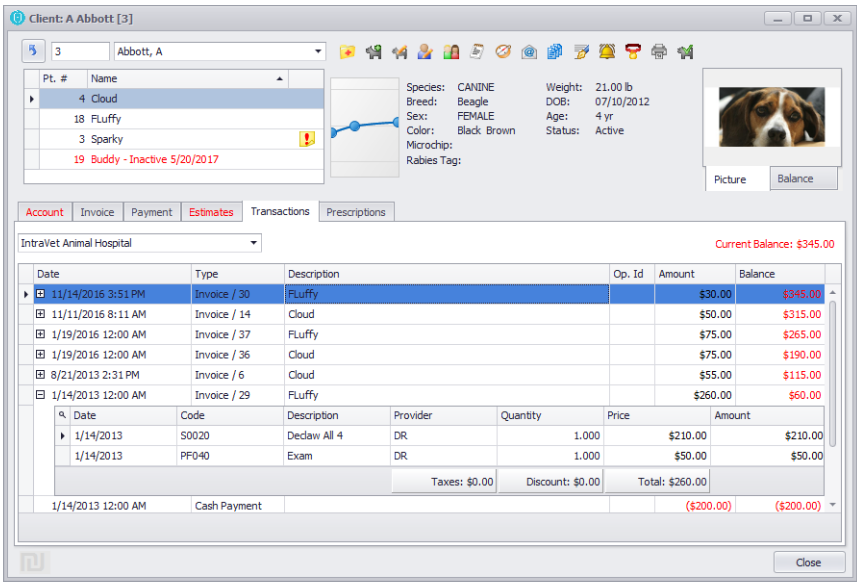
- Select Utility | Estimate Templates Report.
- Click Run.



- Select Display, Print or Cancel.
- You can choose to Print Details.

Transactions

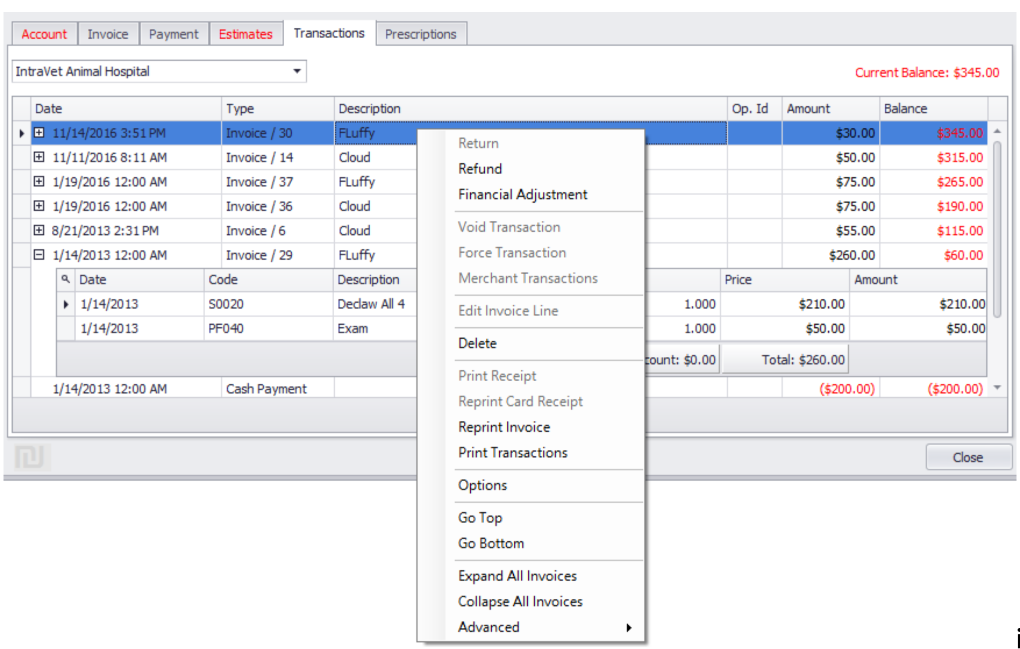
The Transactions tab allows all the client's financial transactions to be viewed.



If you have multiple branches set up, you can switch branches easily from within the transactions screen.

At the top of the transaction tab it lists the current balance for the client.

To view the menu, right-click in the transaction screen.



image

- Return
- Refund
- Financial Adjustment
- Void Transaction
- Force Transaction
- Merchant Transactions
- Edit Invoice Line
- Delete
- Print Receipt
- Reprint Card Receipt
- Reprint Invoice
- Print Transactions
  - Options
  - Print
  - Display
- Options
- Go Top
- Go Bottom
- Expand All Invoices
- Collapse All Invoices
- Advanced
  - Split Invoice
    - Used to manually split a percentage of an invoice's total dollar amount to another client account after it has already been permanently saved.
  - Financial Transaction Transfer
    - Allows the transfer of financial transactions to other Clients and\or Patients after they have already been permanently saved.

Prescriptions

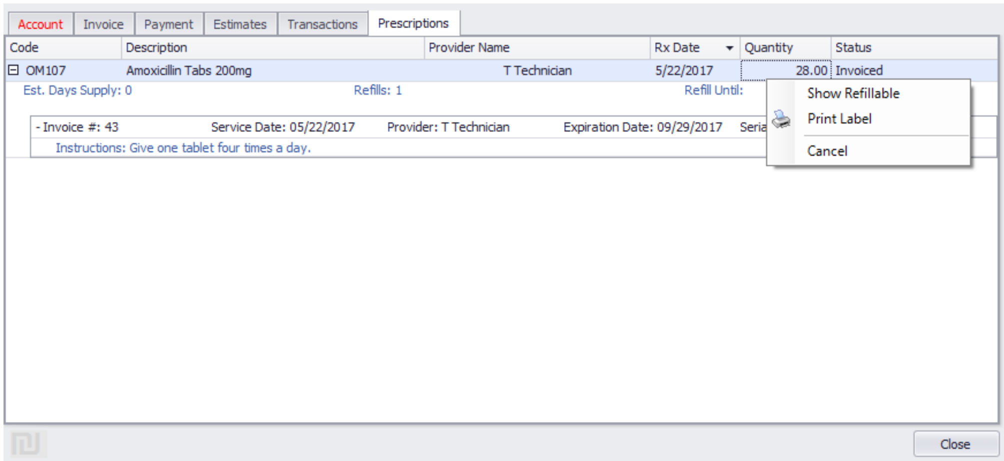
The Prescriptions tab lists all the prescriptions that the selected patient has been prescribed at a quick glance right from the Client Account Management screen.

Right-click on a selected prescription and select from the following options:

- Show Refillable (if a refill is available for the prescription)

- The refill option will automatically place this item in the invoice for the patient.

- **Print Label**
- **Cancel**



The Appointment Calendar

IntraVet keeps customized calendars for each provider in the system. You can set all providers up in the same calendar or set up different calendars for specialists and technicians depending on how you want to view and manage them. There is no limit to how many groups you can set up or how many providers that you put in each group. You will want to set them up in a way that you can see and use them efficiently at your practice.

Appointment Calendar Setup

Type Codes

Before setting up your groups and deciding which providers go where, decide on your block and reserve types. When you go into each provider's setup, you will want to set aside time for things like lunch, surgery, emergency appointments, catch-up time and staff meetings. Block and Reserve types let you quickly assign reasons and times for providers to be unavailable. Appointment types let you assign a default, color coded time to frequent appointment types as a guide and visual cue for the staff.

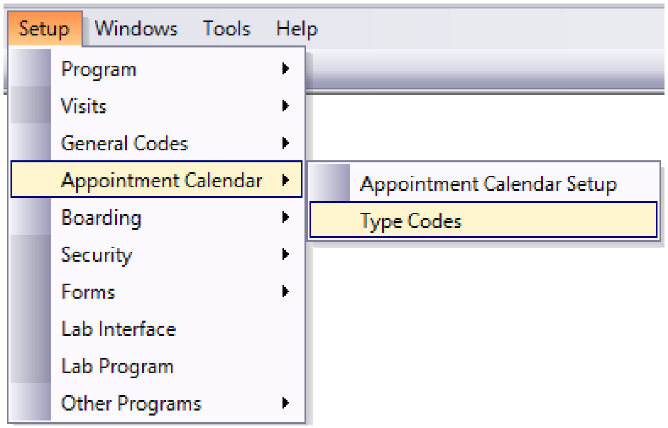
Appointment Types: Use when making individual appointments for patients. Color codes and time lengths can be assigned to each appointment type. For example, allot 40 minutes to new patient appointments or sick patients, but allot 15 minutes to suture removal types.

Block Types: Use block types/blocking for times that the provider is not available. IntraVet restricts users from making appointments in these slots. However, you can grant access to certain users to unblock these slots as needed.

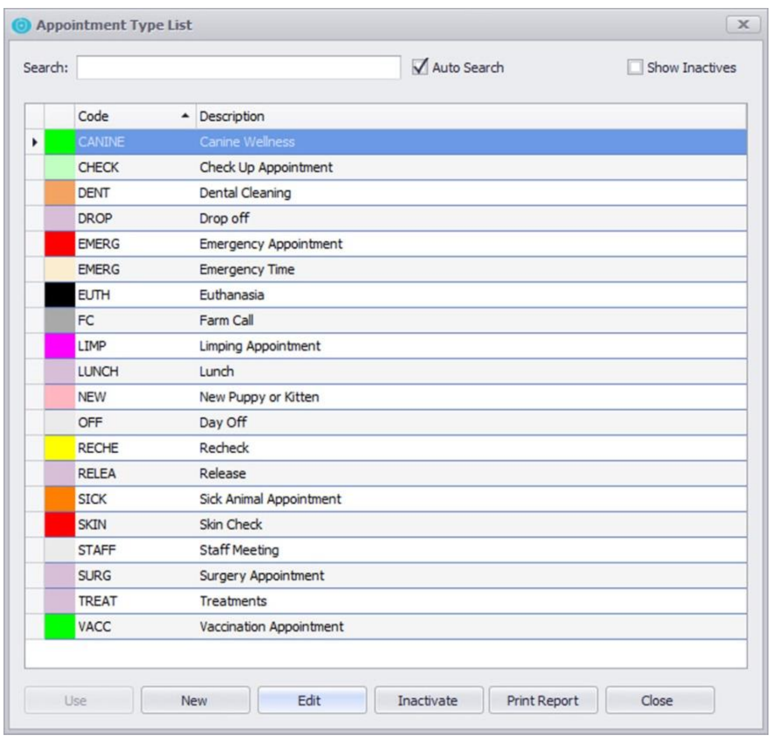
Reserve Types: Use these to indicate that a provider is available but that the time is dedicated for a certain purpose, for example, emergency appointments or surgery. Appointments can be made in these slots.

How to Set Up Type Codes

- From the IntraVet Menu Bar, select Setup | Appointment Calendar | Type Codes.



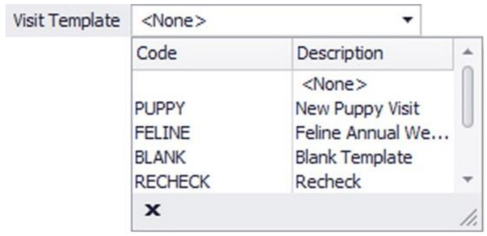
- There are default Type Codes for reference on the left. Double-click on an existing code to edit it. To add a new type Code, click the New button at the bottom. Enter a Code and Description. Codes have a maximum of 8 characters, descriptions 40 characters.



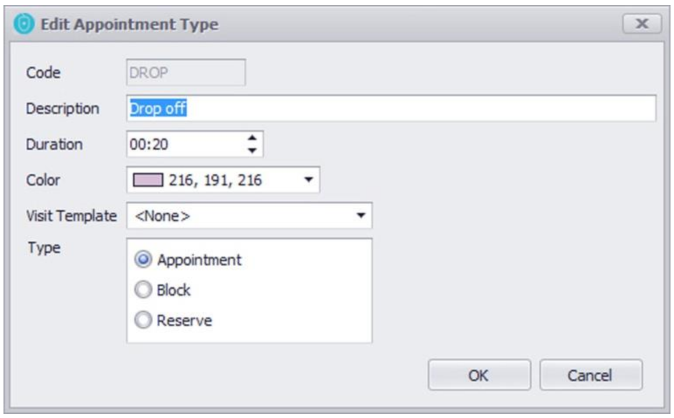
- Select a color (available only for Appointment Types. Reserves are gold and Blocks are gray).

- Choose a default amount of time (Duration), if applicable. If you usually block out an hour for lunch, it saves time to associate 60 minutes to the lunch block Enter Setup. Choose default time periods for any kind of type.

- Choose a Visit Template to automatically load when an appointment of this type is made. These are pre-defined treatment packages. They can make invoicing more efficient, and you can forecast staff time and income based on which templates are used in future appointments. (Refer to the chapter Visits and Invoicing.)



- Indicate whether the type is for Appointment, Block, or Reserve.
- Click OK.



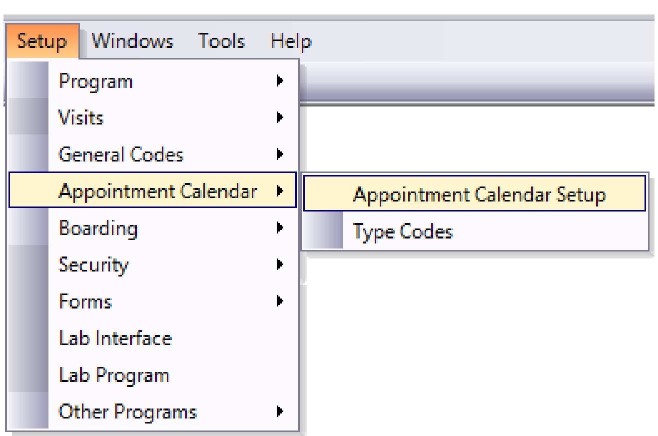
Appointment Group Setup

After setting up type codes, providers and templates, you can easily put together groups/calendars for your practice. Each group is a separate calendar and a separate window. Keep this in mind when deciding if you should have separate groups for Surgery, Grooming, or other departments of your practice. Even if you have separate groups, all appointments made for the same branch appear together in the Control Center where you view the day's activity and track patient progress.

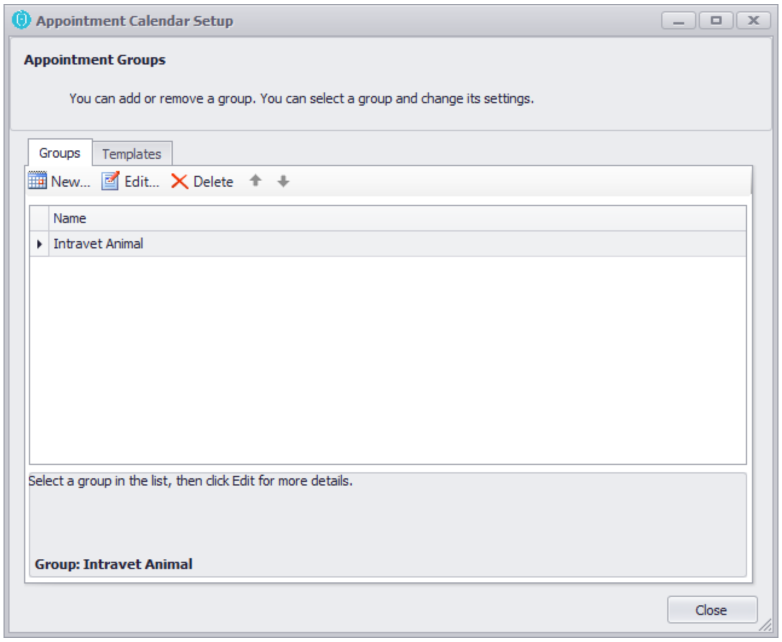
How to Set Up Appointment Groups/Calendars

- From the IntraVet Menu Bar, select Setup | Appointment Calendar | Appointment Calendar Setup.

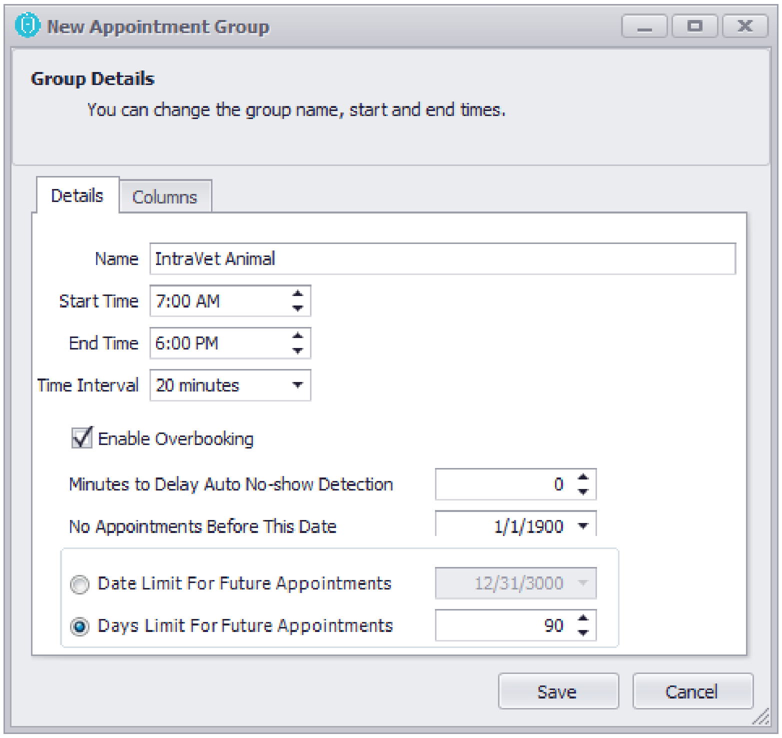
  Create users and providers before completing the group calendar setup so that everyone is in the database. (See chapters Security and Auditing for details.)



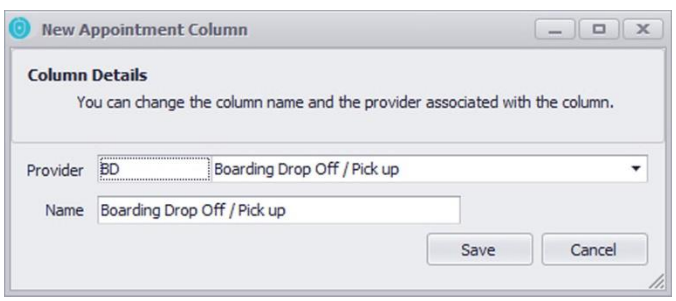
- Click the Groups tab.



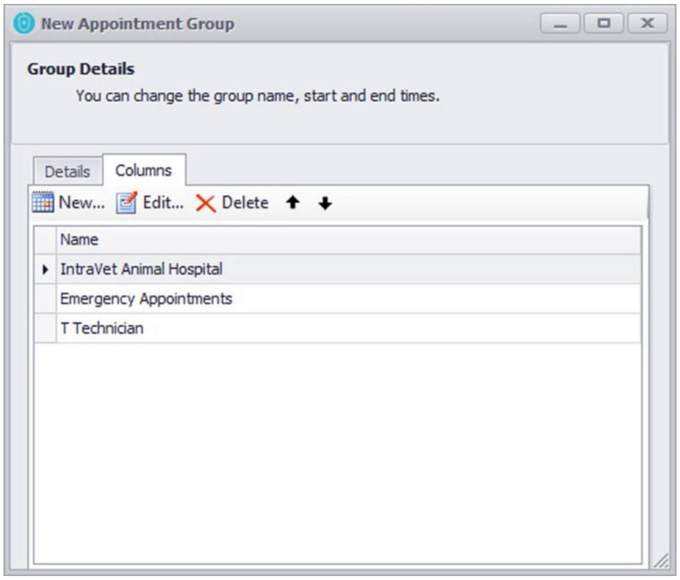
- Select New to create a new appointment group, or double-click on an existing Group to edit.
- Enter or edit the Group Name (for example: Branch names, if you have multiple locations, Grooming, Surgery, and Regular Appointments).
- Select a Start Time and End Time for hours you are scheduling appointments. (Drop-offs appear in a separate section with no time assigned, so you do not have to allow for them.)
- Choose a default Time Interval (5, 10, 15, 20, 30 and 60): This feature affects only the display. Choose an hour to see an entire day, or choose smaller intervals to see more detail for each hour. The interval prevents you from making appointments for other time intervals. You can change intervals without affecting your previously booked appointments.
- Select Enable Overbooking to allow multiple appointments to be booked in the same time slot.
- Set the number of Minutes to Delay Auto No-show Detection.
- Enter a date for No Appointments Before This Date.
- Enter a Date Limit for Future Appointments.
- Enter the number of Days Limit for Future Appointments.
- Click Save.



- Click the Columns tab to add providers or columns to your calendar.
- Click New to add a new provider or column, or double-click to edit an existing column.



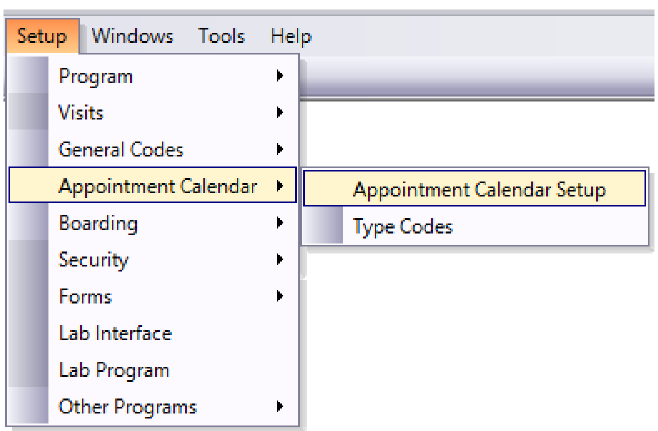
- You can use the up- and down-arrows to change the order that your columns appear.
- Enter a provider/user and change the display name to something else if desired.
- Select a different background color for this column, e.g., yellow for doctors, green for technicians, and utility columns like Rx refill requests blue.
- Click Save. Click Save again.
- Click Close.



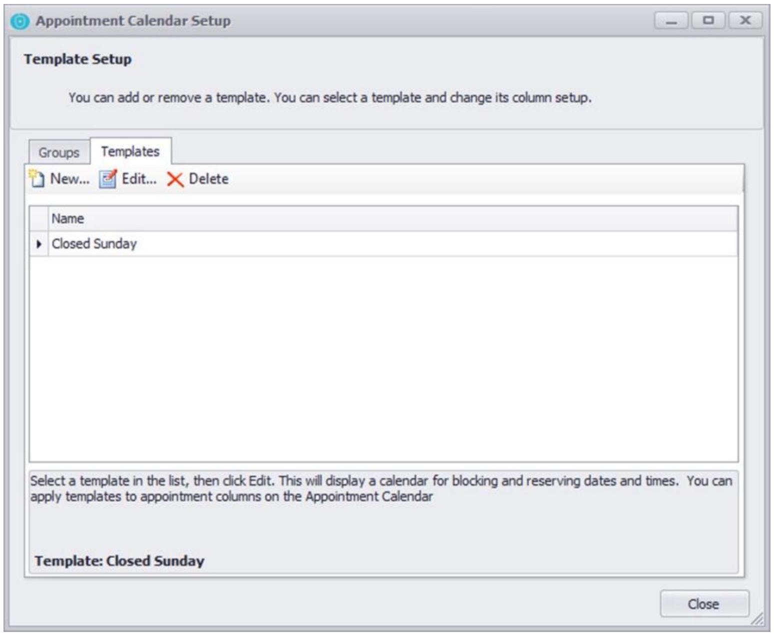
- You can use the up- and down-arrows to change the order of appointment calendar groups (individual calendars).

To Apply Templates

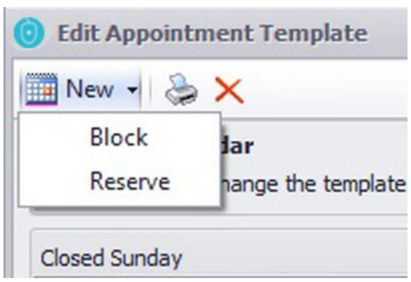
- From the IntraVet Menu Bar, select Setup | Appointment Calendar | Appointment Calendar Setup.



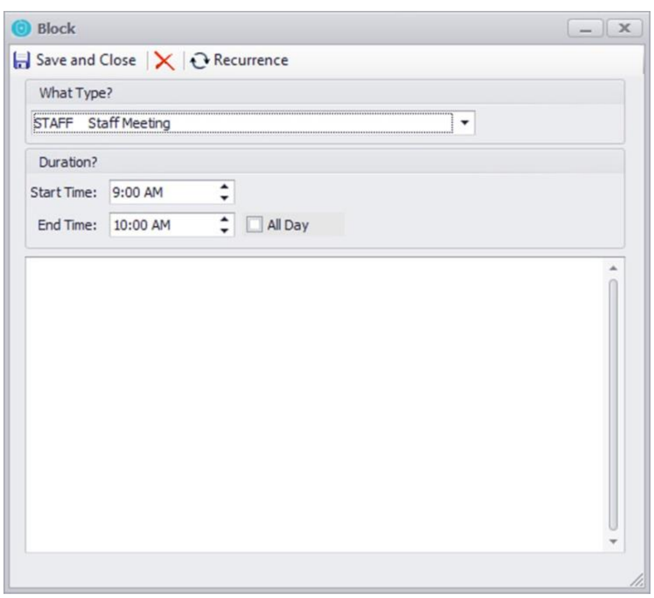
- By default, the window opens the Groups tab.
- Click the Templates tab.
- Choose the template you want to apply. Click Edit.



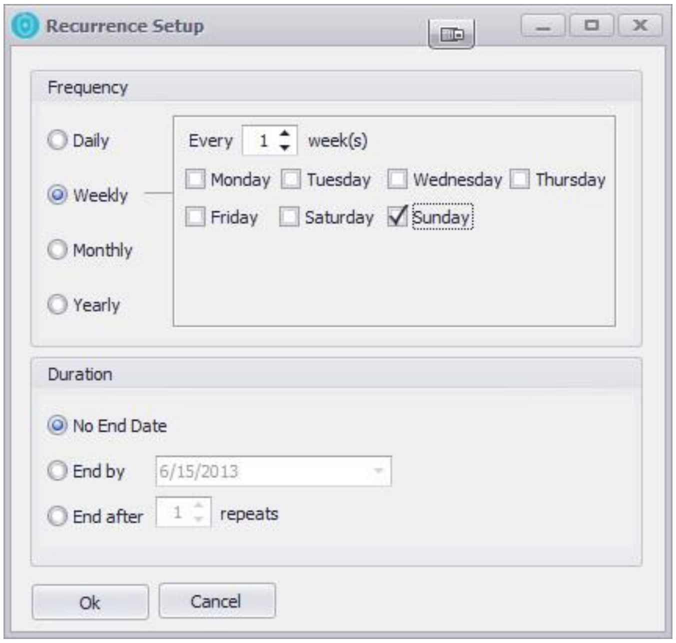
- Click New | Block or Reserve or right-click in a column and choose Block or Reserve.



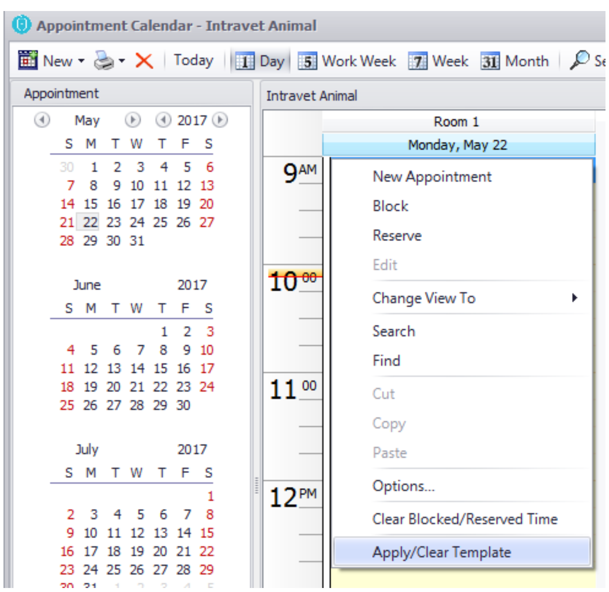
- Choose the Start Time and End Time.
- Set Recurrence, if needed.



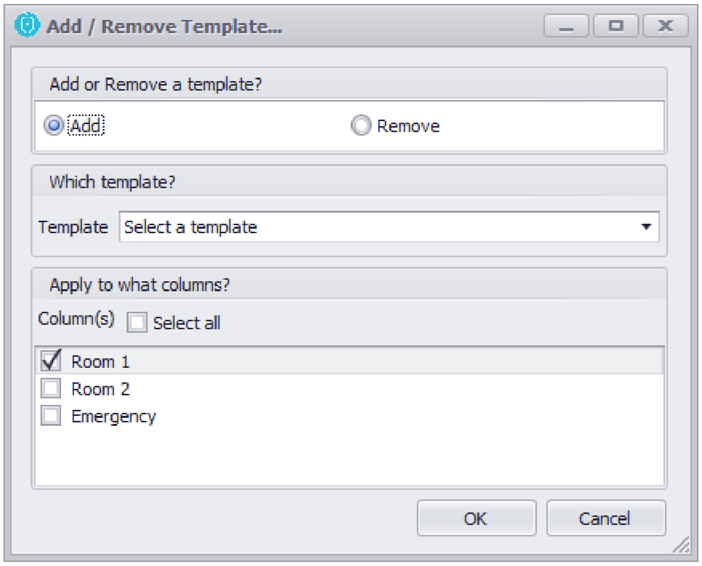
- In the Recurrence Setup screen, select the Frequency, days involved and Duration.
- Click OK.



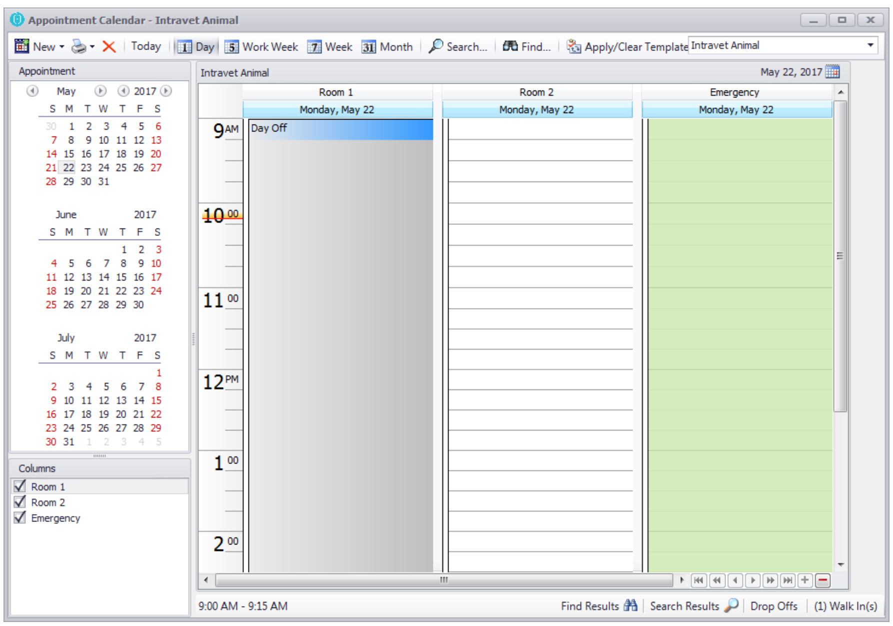
- Click Save and Close.
- Click Save.
- On the Appointment Calendar, go to the day of the week involved, right-click on an appointment line and select Apply/Clear Template.



- Click the Add radio button.
- Select a Template.
- Click Select all or select individual columns.
- Click OK.



- You can then individually edit each column in the group.



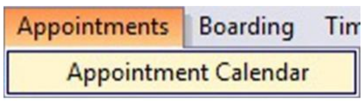
Changes to the Appointment Calendar Setup may be made at any time while in use by others. You can block, reserve and add columns without affecting existing appointments; however, associated appointments are lost when columns or groups are deleted.

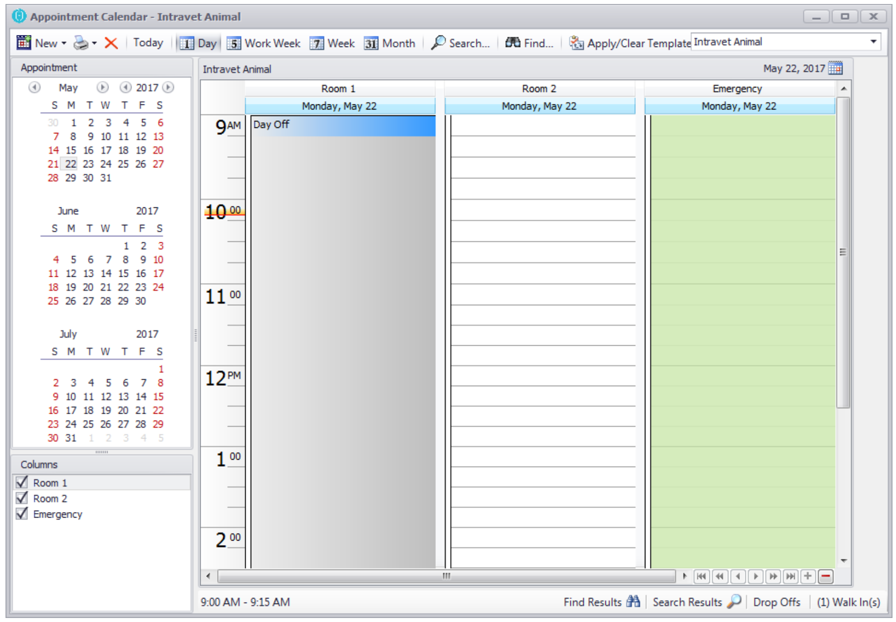
Calendar

The appointment calendar is used daily to view and make appointments and drop-offs, confirm upcoming appointments and associate visits or services with them.

Viewing the Calendar

There are a couple of options for viewing the calendar. Open the calendar by clicking the Appointment Calendar icon in the IntraVet Toolbar or selecting Appointments | Appointment Calendar from the Menu Bar.



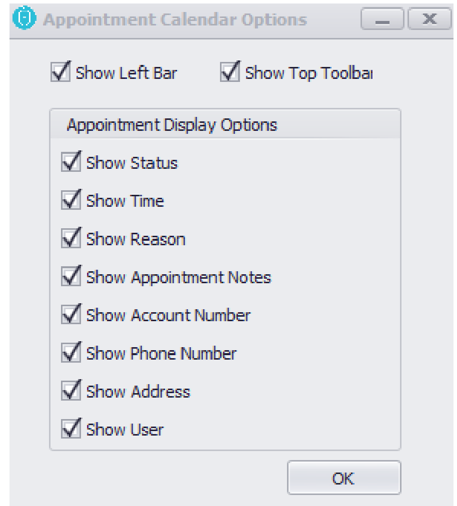


Viewing Options

- Group: The calendar that is associated with your branch appears. You can change the group or calendar by clicking the drop-down menu in the upper right.
- Time Period: Use the calendar arrows on the upper left side to switch months or years. Click the Day, Work Week, Week, or Month buttons to quickly change your time period view. You can also highlight days on the monthly calendars to select specific days.
- You can select the Work Week button in the middle toolbar to view weekly appointments.
- Columns: The number of columns and which columns appear in the group are determined in the group setup. However, you can scroll to see more or change the number you see by:
    - Checking or unchecking the column boxes in the lower left.
    - Click the "+" or "–" in the lower right portion of the window to increase or decrease the columns shown.
    - General: You can change the look of the calendar by hiding or showing two features: the left panel and the Toolbar. Right-click in the appointment calendar, choose Options and check or uncheck the desired feature.

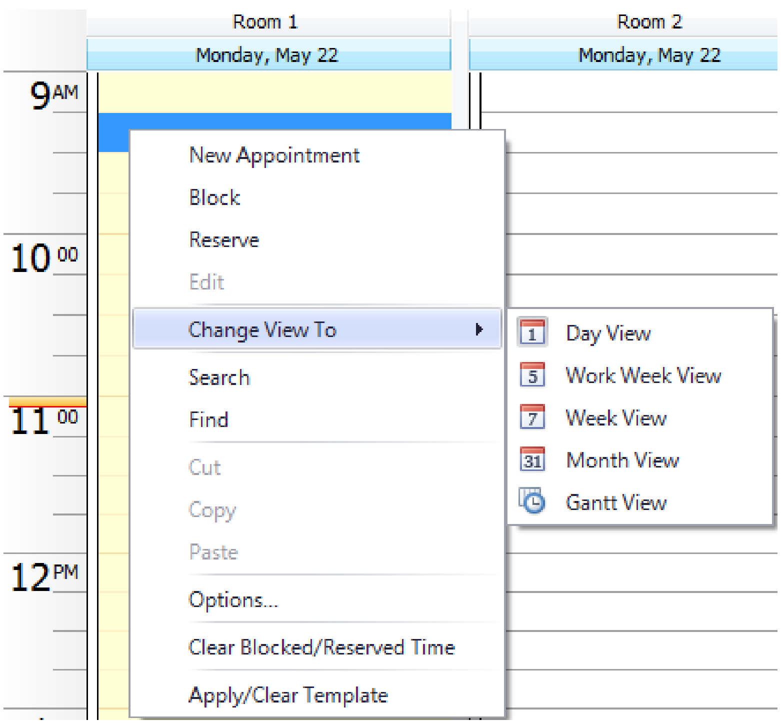
If Show Left Bar is deselected, it will remove the Calendar from view.

Appointment Display Options:



Show Status – Display the patient status.
Show Time – Display Time.
Show Reason – Display the reason for the appointment.
Show Appointment Notes – Display the notes for this appointment.
Show Account Number – Display the patient account number.
Show Phone Number – Display the client's phone number.
Show Address – Display the address for the client.
Show User – Display the user who made the appointment.

If Show Top Toolbar is deselected, you can still change the monthly/daily view from the right-click menu within the calendar by selecting Change View To.



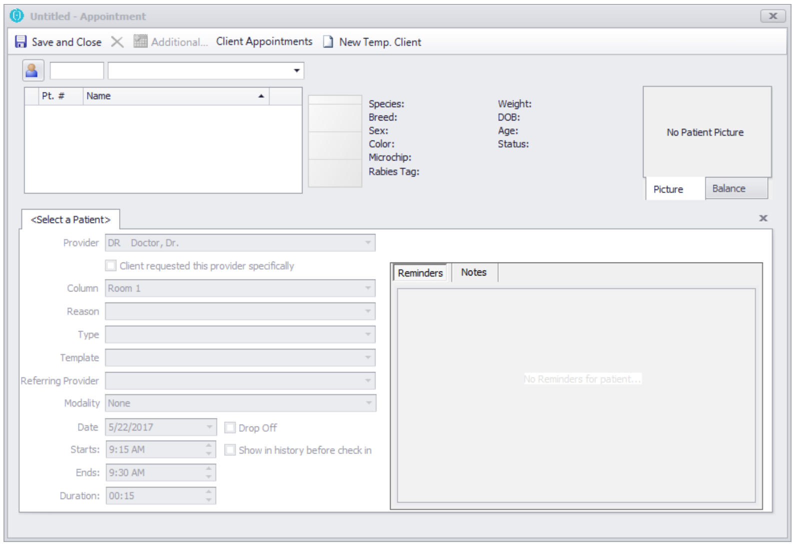
How to Make Appointments

- Double-click on the slot where you want to make the new appointment or right-click on the slot and choose New Appointment.

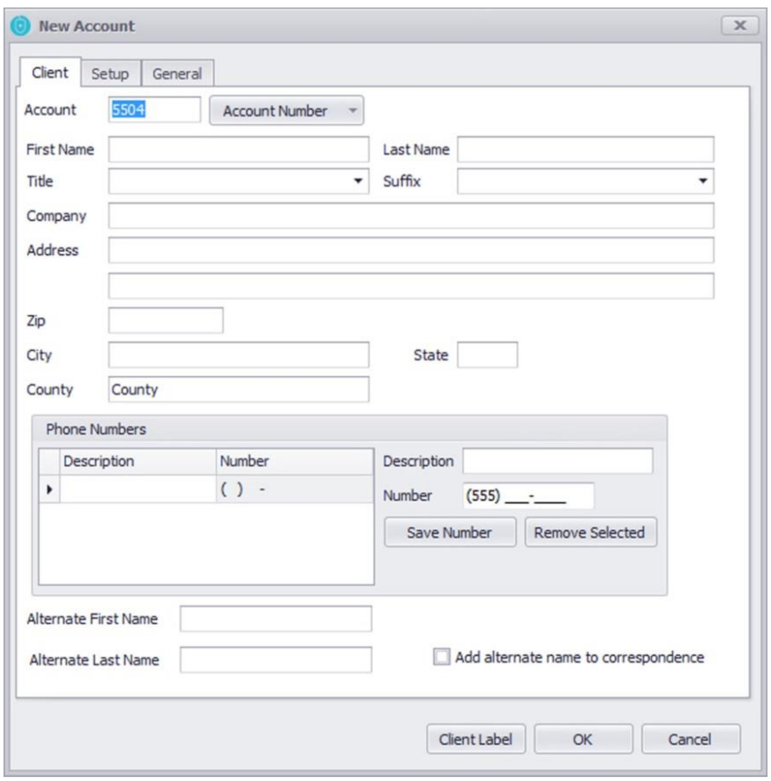
  The New Appointment window appears. It defaults to the column/provider that you selected.

  Choose your Client and Patient. If one or both is not yet in the system:

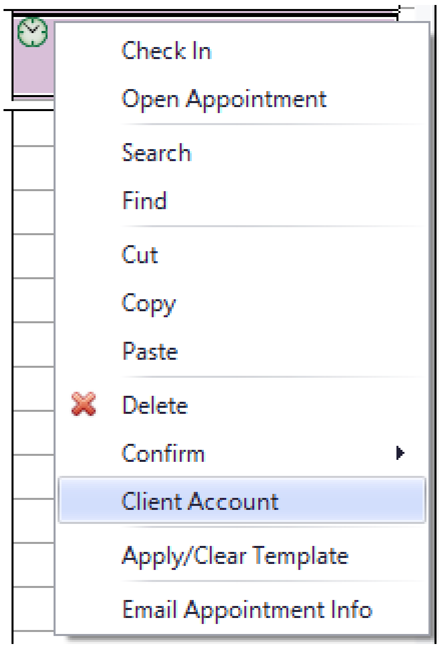
- Click the Open Account icon on the upper left of the Appointment screen.



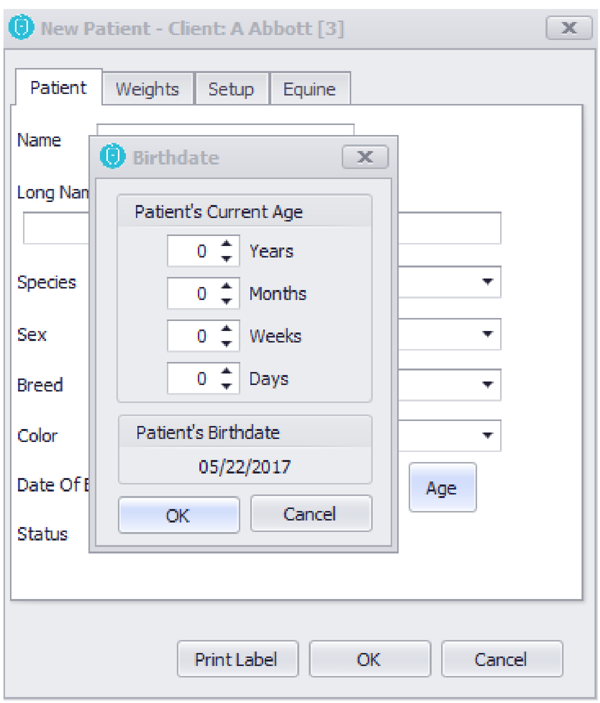
- For new clients, click the New button at the bottom of the Client List screen. New Account screen will appear. Enter First Name, Last Name, Address and Phone Number. Click OK.



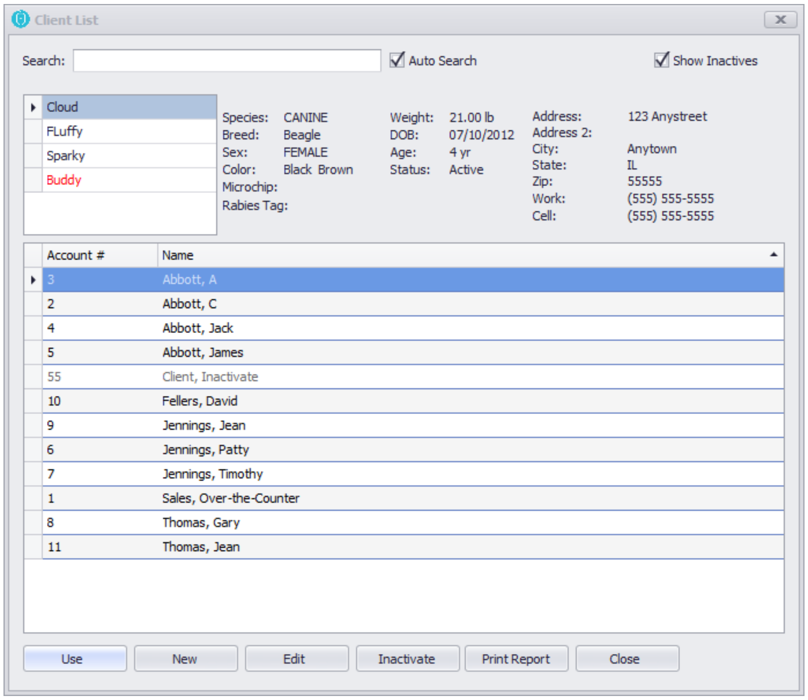
- For new patients, click the Add Patient icon . Enter Patient Name and Species. The other fields and options can be completed when they arrive for their appointment.
- To change a client or patient's name after the appointment is made, or to change any client/patient information, right-click on the appointment. Then select Client Account.



- **If the patient's age is not known at the time the account is set up, IntraVet provides a screen to choose a generic age such as 3 months or 1 year, then, converts your selection to real age. Select Age and the Birthdate screen will appear. Enter information and click OK.**



- **If the patient is already in the system but is inactive, open an appointment time slot. There are two blank fields at the top of the window for Client information. Click the Open Account icon on the upper left of the Appointment screen. The Client List screen will appear. Check the box Show Inactives.**



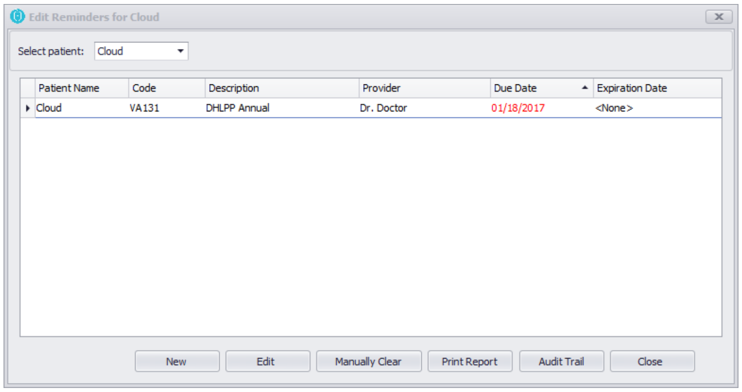
- Scroll to find the client/patient, highlight and click Use or Edit. Or you can double-select the client name.

  A warning pop-up will appear if the patient is inactive or has other warnings recorded in the file.

- Click OK to continue.
- Edit the Provider and Column, if needed. Check the Provider requested box if the client wants to see only this provider. (A lock symbol appears on the appointment display when checked.)
- Enter a Reason (optional).
- Choose a Type (optional). Types can be assigned a color and default time in setup.
- Select a Template (optional). If you have visit templates (default treatment plans for common visits), you can associate it with a type. When the patient is checked in, this treatment plan is already there to be confirmed and edited. Associating visit templates to types/appointments is useful for forecasting revenue and staff time.
- Change the dates/times as needed. The time needed defaults to either the interval selected for your group in setup or the time associated with the appointment type, if you have entered one.
- Check the Drop-off box if this is a drop-off with no particular time associated. Drop-offs appear as a separate list on the bottom of the appointment calendar for that day. They can be dragged to a particular slot as you accommodate them.
- Enter notes. The white area is for typing general notes about the appointment, if needed. These appear on the appointment and in the Control Center.

A place for operator warnings and reminders for the patient (Reminders/Recommendations) is located below general notes.

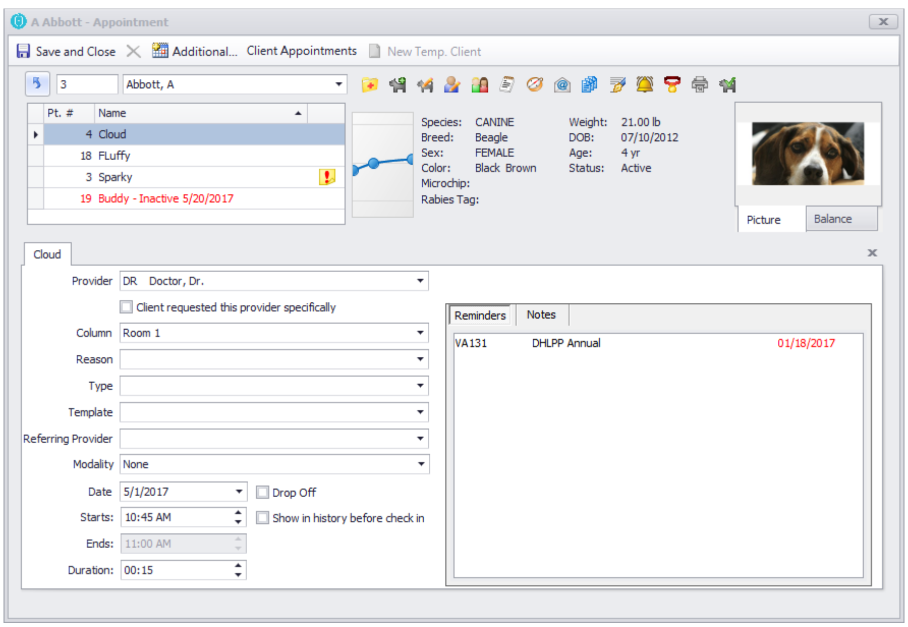
- Click Save and Close in the top left of the window. If you receive a message that your appointment conflicts with another, you will need to edit your date/times.



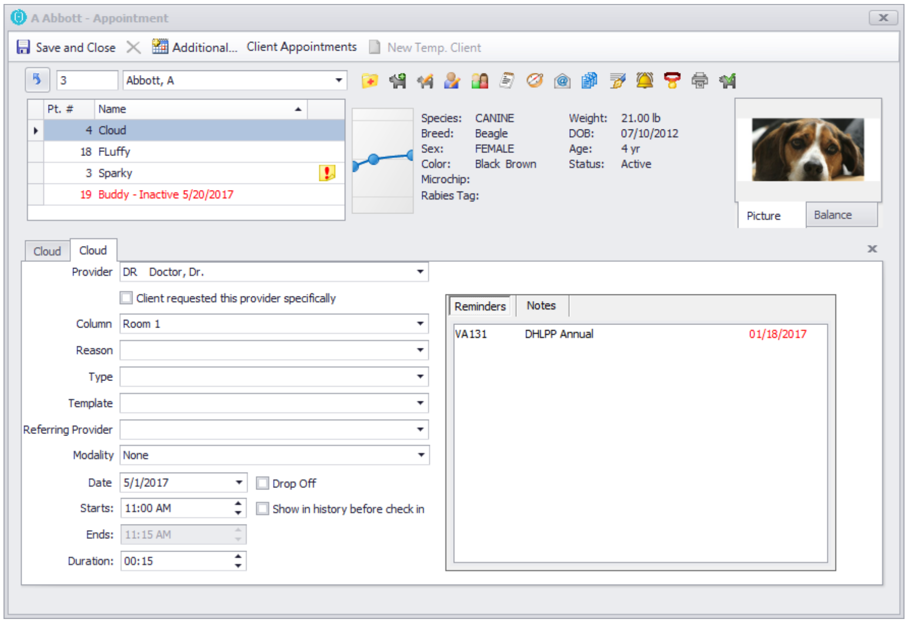
- Two people can open and schedule an appointment at the same time. The first to save their appointment gets the appointment.

How to Make Multiple Appointments for the Same Client

- Click the Additional link at the top of the Appointment window.
- Use the steps above to enter information for the next appointment.

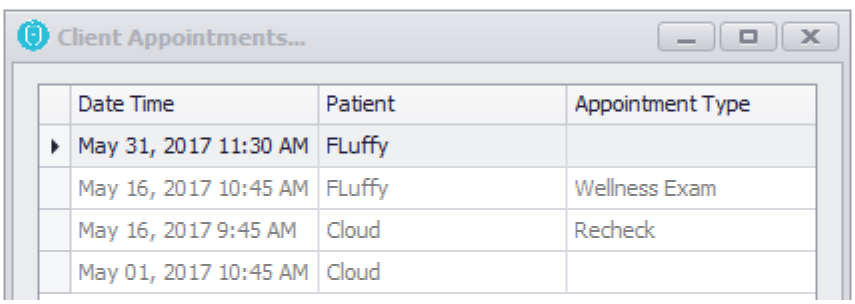


A new tab for the additional appointment appears. This additional appointment can be for the same patient or for a different patient.



The time for the next appointment defaults to the next slot after the first appointment. The rest of the information defaults to the same as the first appointment made for the client. It can all be edited.

- You can see a list of all this client's scheduled appointments by clicking on Client Appointments in the Menu Bar. Close this window.



- Click Save and Close to save all together.

  After saving an appointment, you can change its start and end times by dragging the top edge up or the bottom edge down.

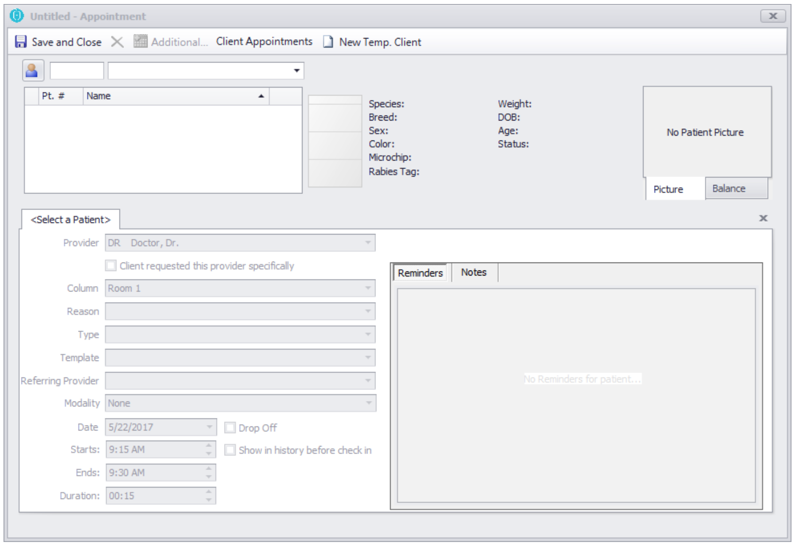
How to Make a Walk-in Emergency Appointment

A walk-in can be processed directly through the appointment calendar. Only a minimal amount of information needs to be gathered during check-in so that the patient can be seen immediately.

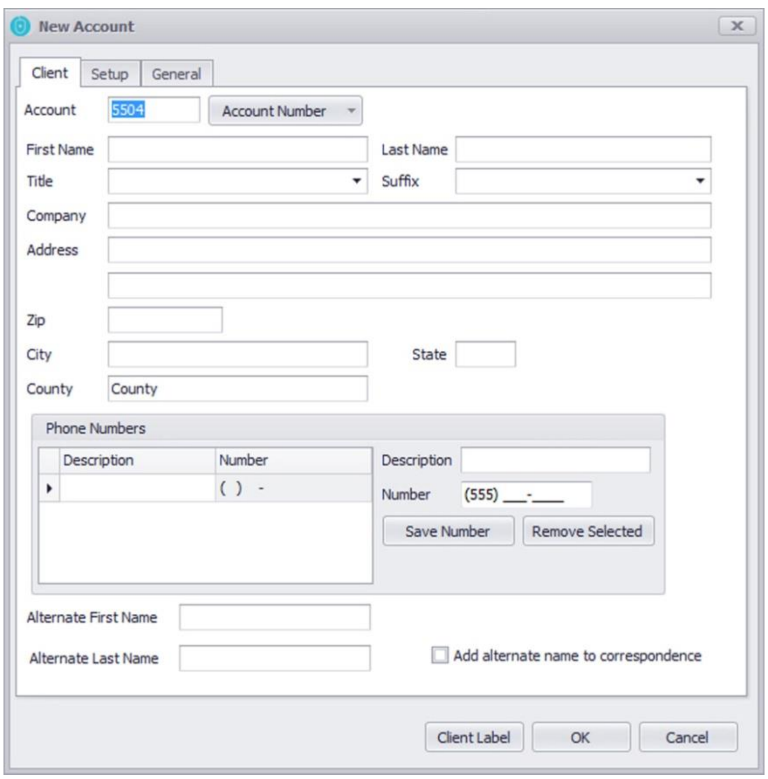
New Client and Patient

- Double-click on the slot where you want to make the new appointment or right-click on the slot and choose New Appointment.
- The New Appointment window appears. It defaults to the column/provider that you selected.
  a. Choose your Client and Patient. If one or both is not yet in the system:

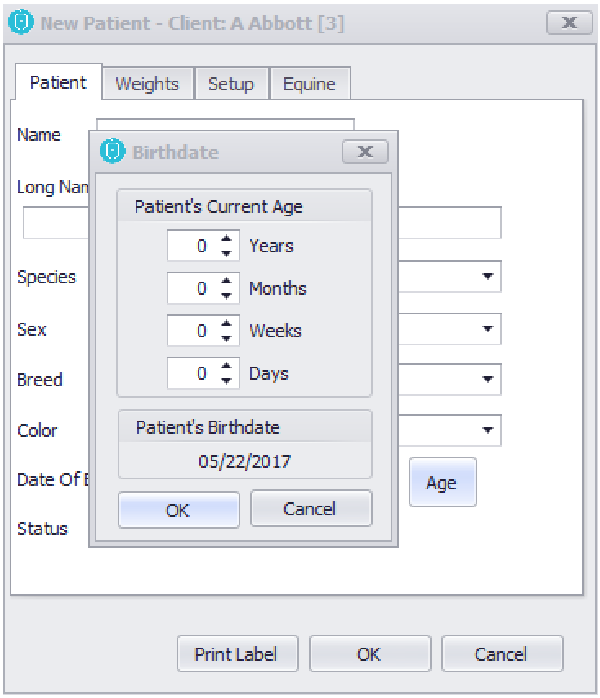
- Click the Open Account icon on the upper left of the Appointment screen for the client list to appear.



- For new clients, click the New button at the bottom of the Client List screen. New Account screen will appear. Enter First Name, Last Name, Address and Phone Number. Click OK.



- For new patients, click the Add Patient icon . Enter Patient Name and Species. The other fields and options can be completed after the emergency has been resolved.
- If the patient's age is not known at the time the account is set up, IntraVet provides a screen to choose a generic age such as 3 months or 1 year, then, converts your selection to real age. Select Age and the Birthdate screen will appear. Enter information and click OK.



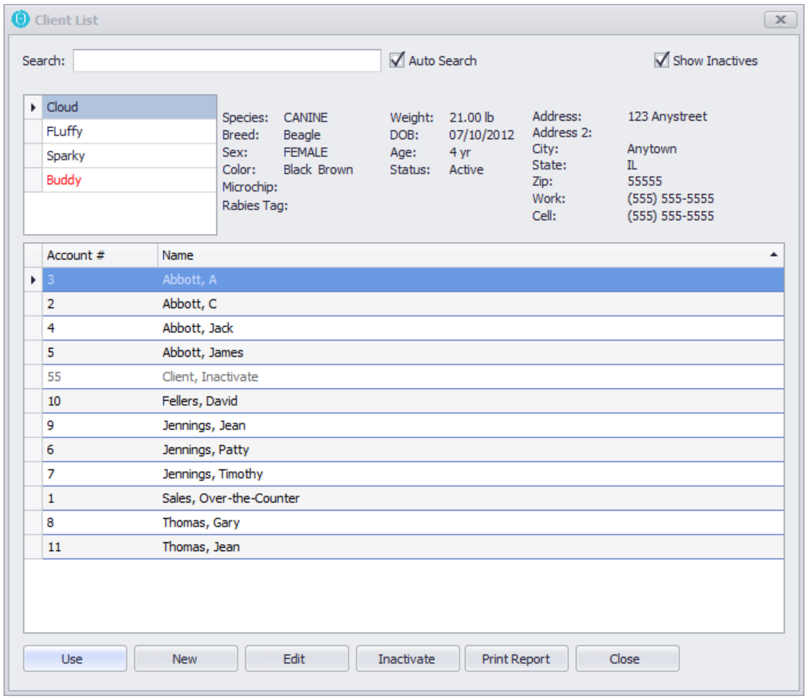
Established Client and Patient

- If the patient is already in the system, open an appointment time slot. There are two blank fields at the top of the window for Client information. Click the Open Account icon on the upper left of the Appointment screen. The Client List screen will appear.

To Search, type the client's last name, first name or account number and press Enter on your keyboard, or scroll to find the client/patient. (The system defaults to search by name. If you want to search by account number, click the column header named Account #.) Highlight and click Use or Edit. Or you can double-click on the client name.

The Auto Search option allows you to go to the first account that fits the search criteria that was entered without having to hit the tab key.

When checked, the Show Inactives shows inactive clients and allows you to search for them and reactivate their account. Inactive clients will show up in gray in the Client List.



The Inactivate option allows you to inactivate a client. If a client is inactivated it automatically inactivates the patients associated with that client. Once the client has been inactivated the button changes to Activate. This allows you to reactivate a client. Once a client is inactive they will not show up on the Client List unless you check the Show Inactives box.

Established Client and New Patient

- Follow steps for "Established Client and Patient" above. Select Add Patient icon . Enter Patient Name and Species. The other fields and options can be completed after the emergency has been resolved. The patient is ready to be seen.

  Other information can be entered while the patient is in the exam room or at time of invoicing.

  A walk-in emergency will be time-stamped with the current time when you begin the check-in process.

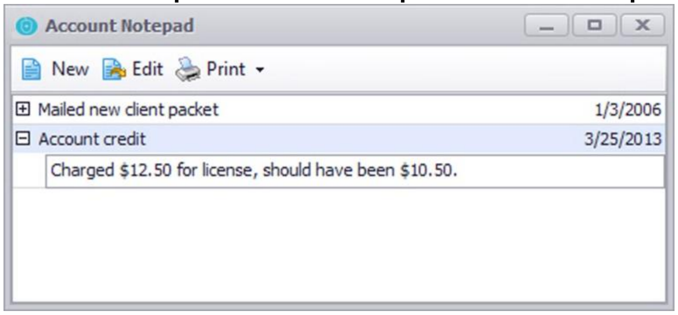
  If it is necessary to hospitalize the patient, you can change the patient's status to Hospitalize either directly from scheduled status or after check-in is complete.

Account Notepad

Making an Account Notepad Entry

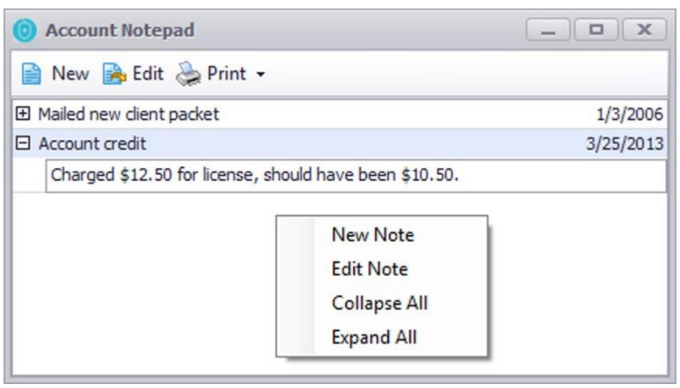
Account Notepad  allows users to add any notes special to that account. New notes can be added; previously saved ones can be edited. Notes can also be deleted as well as printed. Often

Account Notepad is used to keep collection attempts notes and special events with the client.

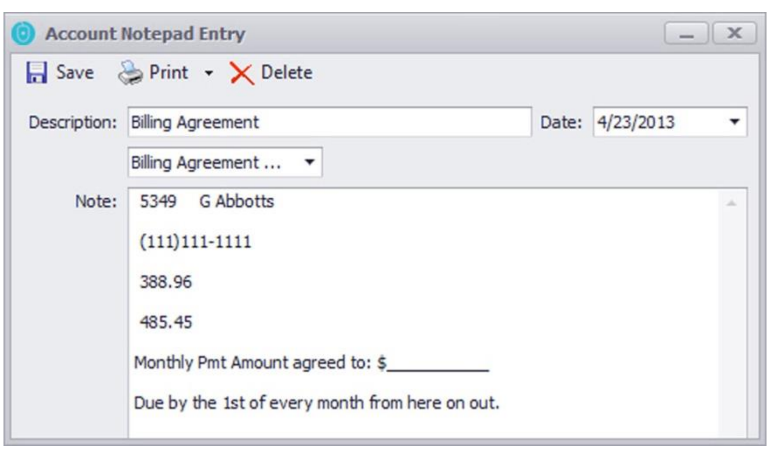


To access the client's account:

- From the IntraVet Toolbar, select the Open Account icon. The Client List screen will appear.
- Scroll to locate the client. Highlight the client and click Use or double-click the entry to open.
- To create a new note, either select the New hot link in the Menu Bar, or right-click in the Notepad pane and select New Note.



- Enter a description and a date.
- Enter your own note and/or Select Canned Text.



- Click Save to make the notes part of the client account.
- From the Appointment Calendar, right-click in the appointment and select Client Account; then, select Account Notepad.

How to Move an Appointment

Method 1: Double-click on the appointment to edit the dates/times directly.

Method 2: Select the appointment and drag it to a different date and/or time slot.

Method 3: Right-click on the appointment and select Cut; left-click on the desired date and time slot; then, right-click and select Paste. (If you forget to left-click on the location where you want to move the appointment before you try to move it, Paste is deactivated when you right-click. You cannot then left-select the new slot and move the appointment. You must start over: right-click/Cut, left-click on new slot, right-click/Paste.)

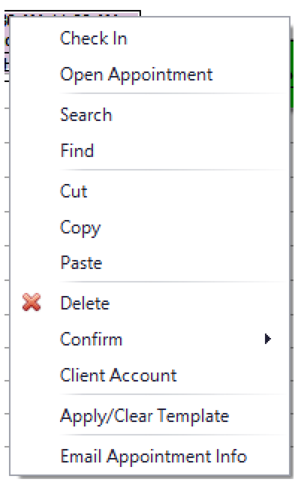
How to Delete an Appointment

- Right-click on the appointment to be deleted.
- Select Delete from the menu.
- Confirm the deletion by clicking Yes.

Not all users have access to delete appointments. This depends on the user/security setup.

How to Edit an Appointment

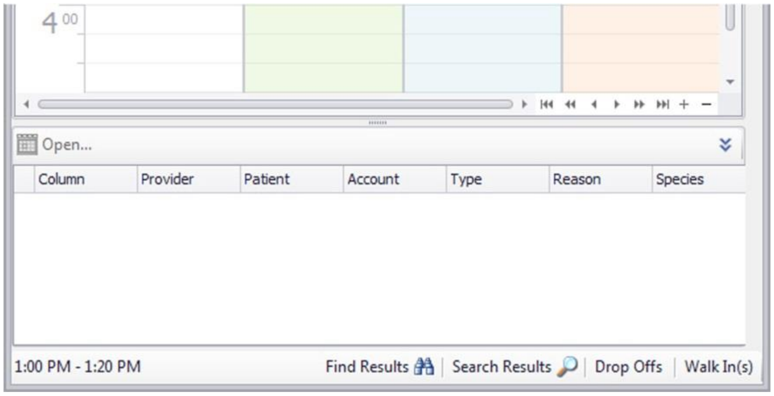
- Double-click on the appointment or right-click and select Open Appointment.
- Make necessary changes.
- Click Save and Close.



Drop Off List

If the Drop Off checkmark is checked when an appointment is made, no specific time is assigned to it. Instead it appears on a separate drop-off list.

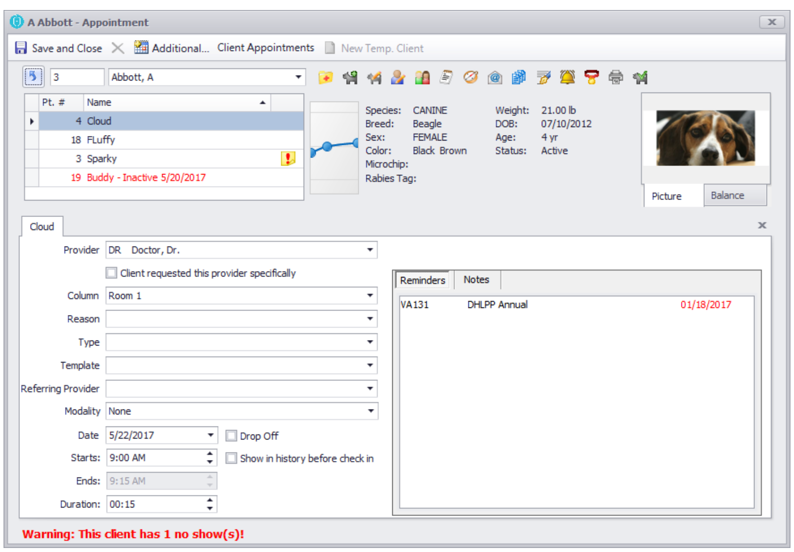
- Click the Drop Offs tab on the bottom right to view the Drop Off list. It includes the species of each patient, reason and a count of drop-offs for the day.

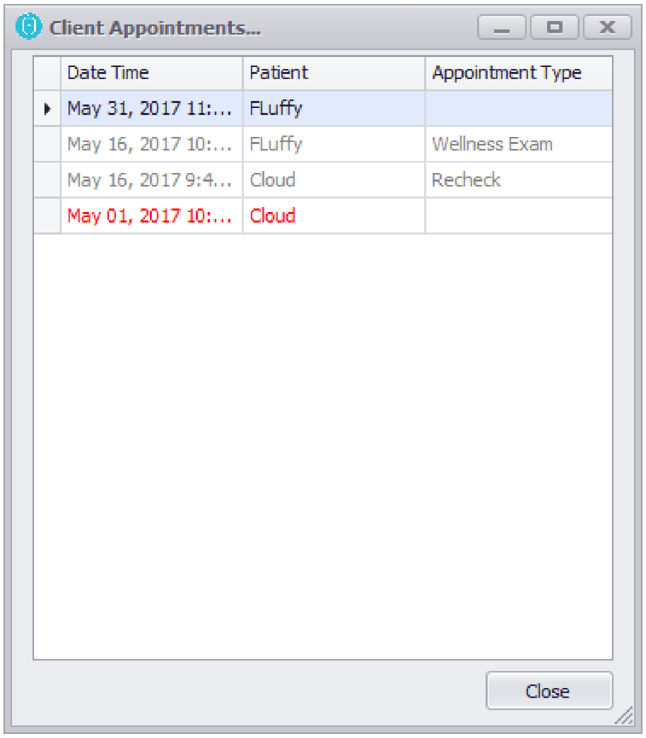


- To close the list, select the double down-arrows at the top right corner of the Drop Off list. Notice that there will be a number in parentheses indicating how many drop-offs there are for that day.

Client Appointment History/No-Shows

- If a client has no-shows, an alert will appear. When you right-click in an open slot in the appointment calendar, select New Appointment, select the client, the alert appears in red in the lower left portion of the window.
- Click the Client Appointments button in the upper left corner of the window to see a history and summary of all an individual client's appointments and appointment types. The no-shows will appear in red.





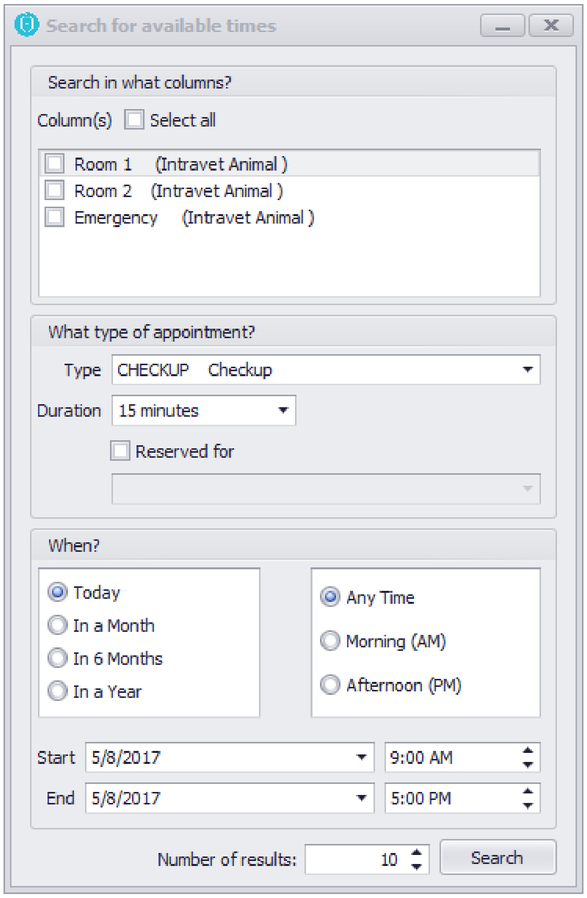
Searching for Appointments

You can search for available appointments to find a slot that suits your client's requests, and you can search for an existing appointment by client to confirm a time.

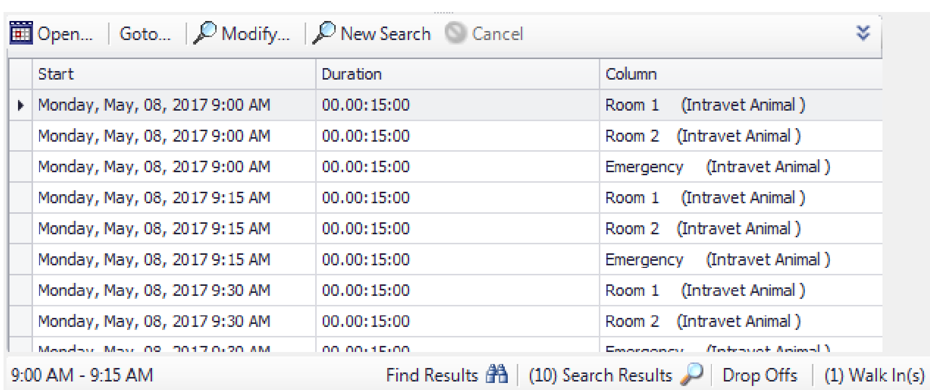
How to Search Available Appointment Slots

- Click Search in the top center of the calendar or right-click in the calendar and select Search. 

- Check only the columns/providers you want or check the Select All box.
- Choose a Type if you want to make sure that the slots you find are available for the necessary duration associated with that type. Duration can also be selected if there are no times associated with appointment types.
- Check Reserved for and pick a Reserve code only if you want to restrict your search to slots that are reserved for a particular activity (Surgery, Sick Patients, etc.).
- Indicate a preference of time span to search with: Today, Month, 6 Month buttons or by date. Leave open to search with no end time/date. This will lengthen your search time.
- If a client prefers morning or afternoon, choose the time desired (AM or PM).
- Number of results defaults to 10, but you can change it.
- Click Search.



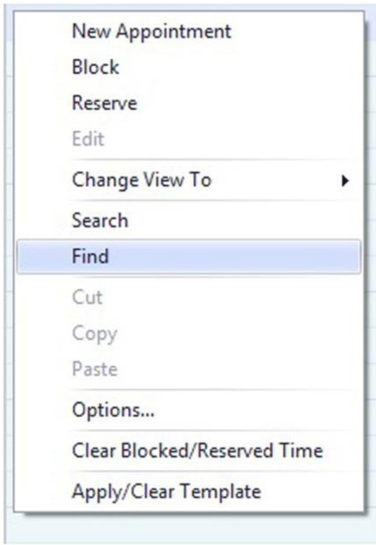
- **The results are displayed. You can select the column headings to sort by each.**



- **Click Open to select the highlighted slot and make the appointment or Goto… to view the slot.**
- **Click New Search to enter different parameters. Your results remain until you close the calendar or do a new search and can be accessed by clicking Search Results in the lower right corner of the appointment calendar window.**
- **Click Modify to alter the existing search based on the previous criteria entered.**
- **To close the list, select the double down-arrows at the top right corner of the Search Results.**

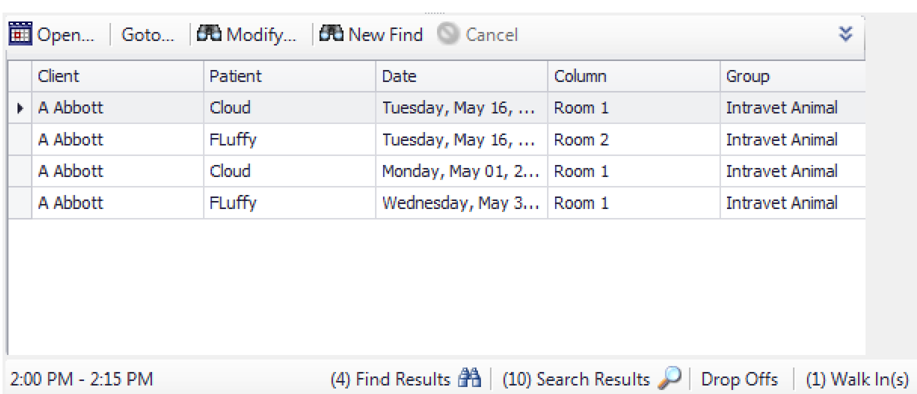
How to Find Existing Appointments

- **Click the Find button Find... in the top center of the calendar, or right-click and select Find.**



- **Enter the client.**
- **Check Include past appointments if desired.**
- **Click Find.**

- **The results display for current, future and past.**



- **Sort by clicking on the column headings.**
- **Click Open to select the highlighted slot and edit the appointment or Goto… to view the slot.**

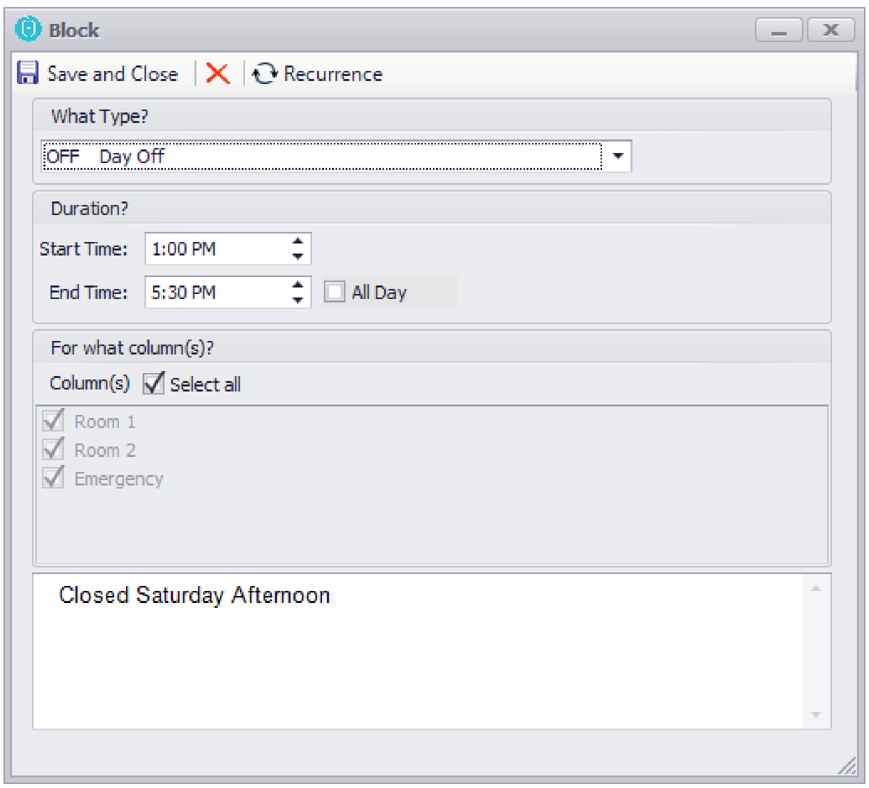
- Click New Find to enter different parameters. Your results remain until you close the calendar or do a new search.
- Click Modify to revise the existing search based on the previous criteria entered.
- To close the list, select the two down-arrows at the top right corner of the Find Results window.

Accessing ePetHealth

If you are logged into ePetHealth and select the ePetHealth button within the Appointment Calendar, the ePetHealth Appointment Reminder Setup page will open in your web browser.

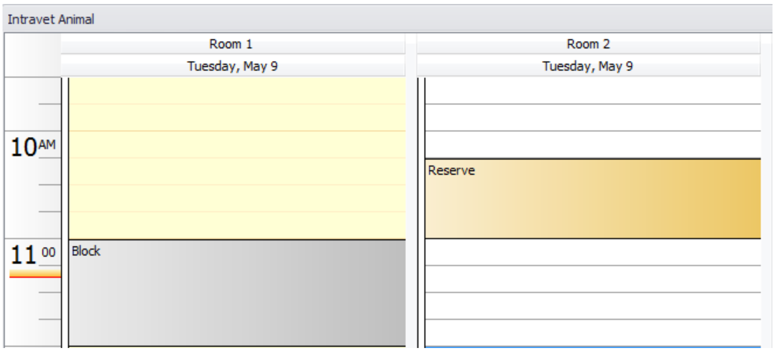
Block and Reserve Slots

Appointment slots can be blocked (made unavailable) or reserved (dedicated to a specific type of appointment). Templates (default schedules) can be set up for each doctor in the Setup, but changes can also be made to each individual day. Both Blocked and Reserved slots can include a Type or reason that they have been blocked/reserved. Notes can be made as well.



How to Add Blocks and Reserves

- To add a Block, highlight a time frame in the calendar (e.g., 9AM–10AM), right-click on it and select Block.
- To add a Reserve, highlight a time frame in the calendar (e.g., 8AM–9AM), right-click on it and select Reserve.



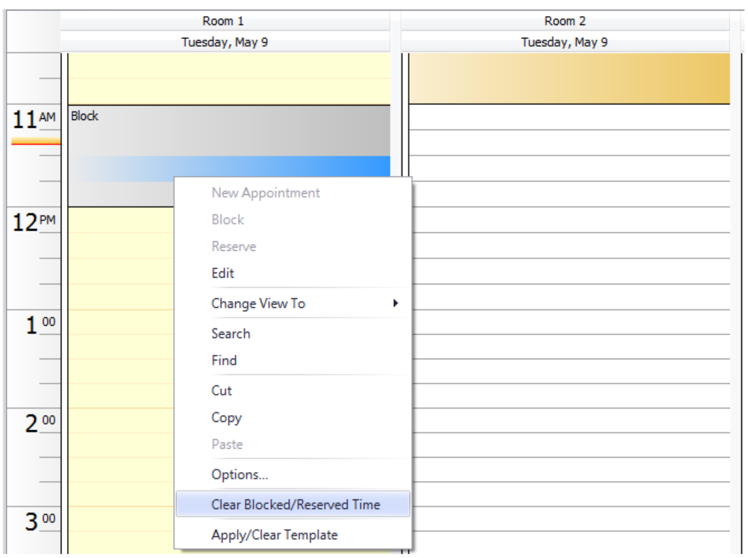
- Indicate the dates/times (choose Recurrence if it repeats). Remember that default schedules can be set in the Appointment Calendar Setup.
- Choose a type code and enter notes, if desired. If you have a duration associated with this Enter the Type Code setup, the duration changes accordingly.
- Select the Start and End time periods or All Day, if applicable.

  In the calendar, you can also use your mouse and drag to expand or shorten existing blocked/reserved timeslots.

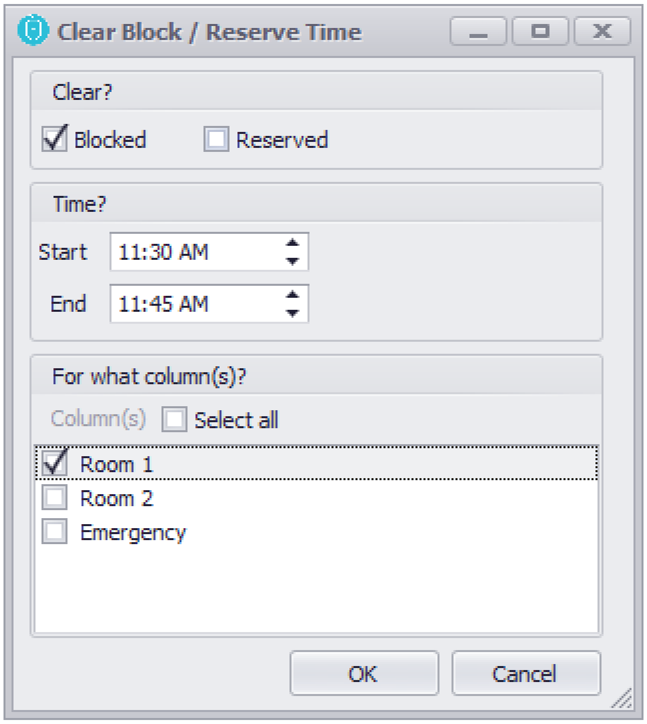
How to Insert an Opening in a Block

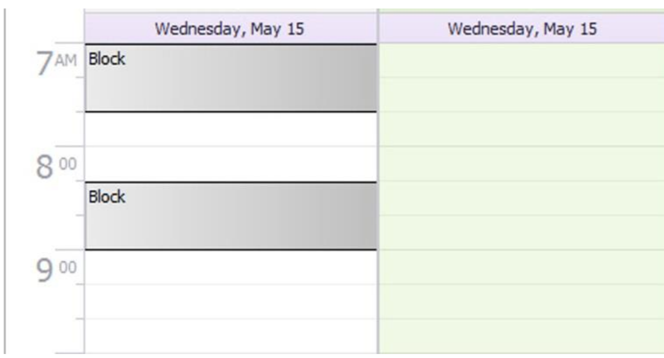
- Right-click inside the time you want to unblock. Select Clear Blocked/Reserved Time.

The image shows an example of T Webb with a Block from 7AM to 9AM.



- Click in Blocked to clear a Blocked time, or click in Reserved to clear a Reserved time.
- Select the time you want cleared.
- Select which columns to clear.
- Click OK.





How to Clear or Delete a Block or Reserve

- Follow the steps above in *How to Insert an Opening in a Block*.
- In the steps above, include the entire blocked/reserved times.

Print the Appointment Calendar

You can print the calendar in four formats:

Provider/Column – for each provider, separated out for only that provider's schedule.

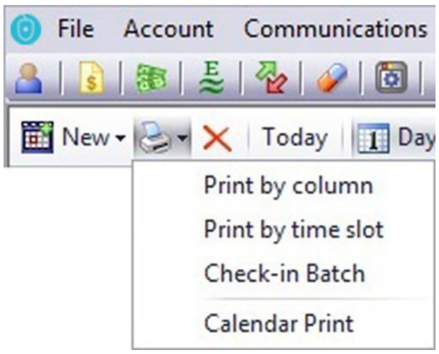
Time slot – to see everything happening (all providers together) organized by time of day.

Check-in Batch – mass print check-in reports (summaries of a patient's recent history, reminders, reason for current visit, etc.)

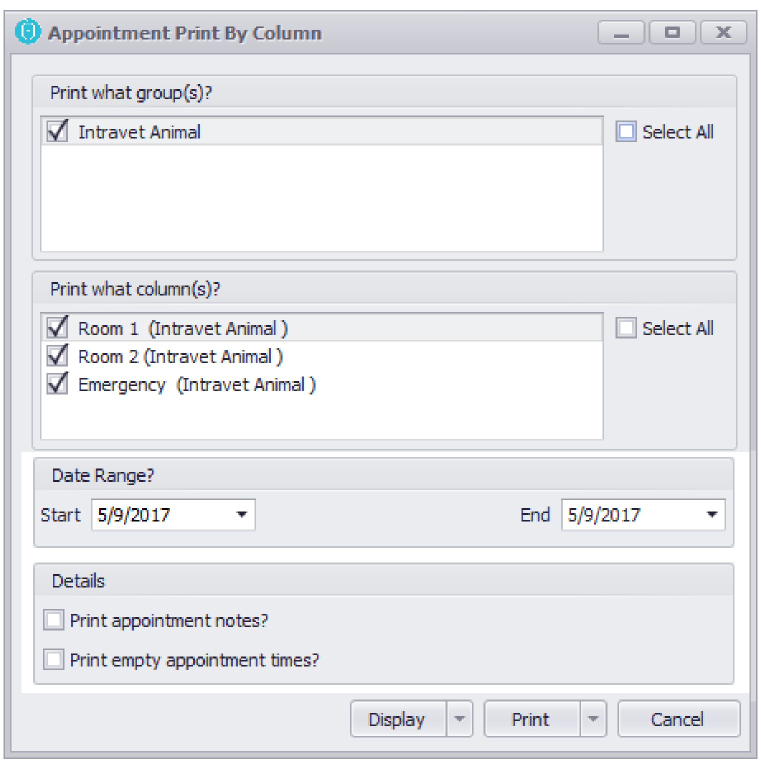
Calendar Print – select the print options as well as the style of calendar.

Column Print

- Click the Printer icon in the upper left of the Appointment Calendar window and choose Print by column.



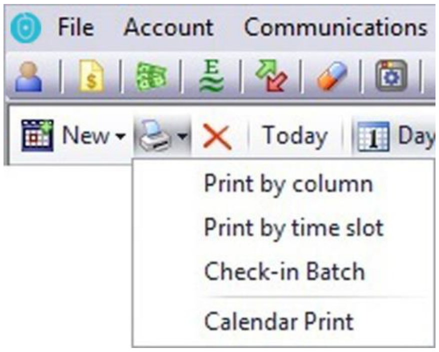
- Print what groups? – Place a checkmark in the box next to the groups to be printed. If all groups are to be printed, check the box to the right, Select All.
- Print what columns? – Place a checkmark in the box next to the columns to be printed. If all columns are to be printed, check the box to the right, Select All.
- Date Range? – Use the down-arrow to select the Start and End dates.
- Details – Check the box if you want to:
  - Print appointment notes?
  - Print empty appointment times?
- Click Display or Print.



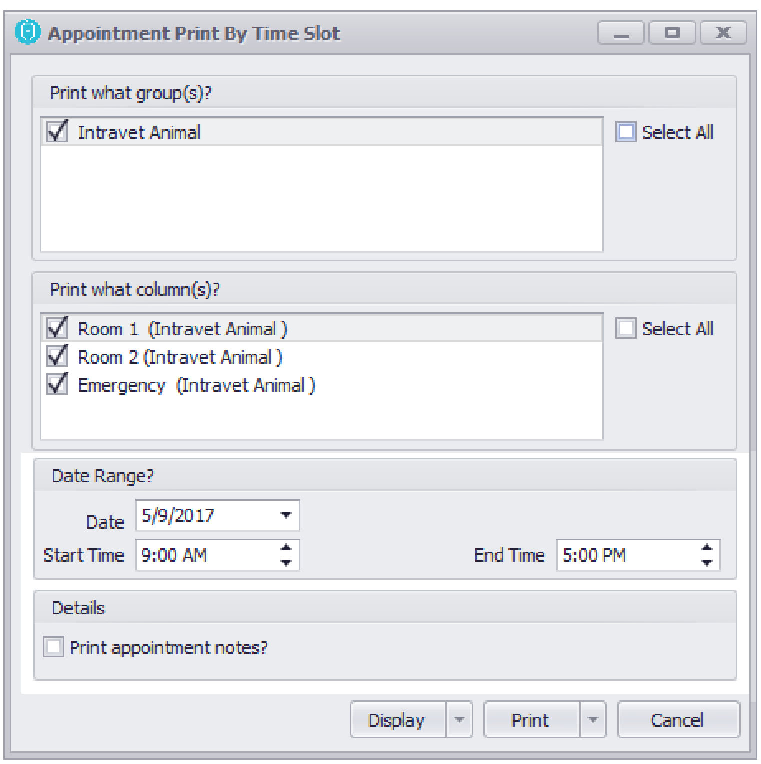
Time Slot Print

A certain time slot can be selected for print. Sometimes only particular hours are needed where an entire column is not.

- Click the Printer icon in the upper left of the Appointment Calendar window and choose Print by time slot.



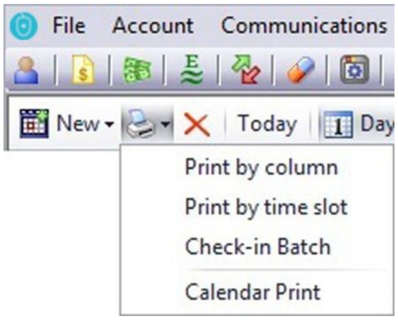
- Print what groups? – Place a checkmark in the box next to the groups to be printed. If all groups are to be printed, check the box to the right, Select All.
- Print what columns? – Place a checkmark in the box next to the columns to be printed. If all columns are to be printed, check the box to the right, Select All.
- Date Range? – Use the down-arrow to select the Date. Use the down-arrow to select the Start Time and End Time.
- Details – Check the box if you want to Print appointment notes?
- Click Display or Print.



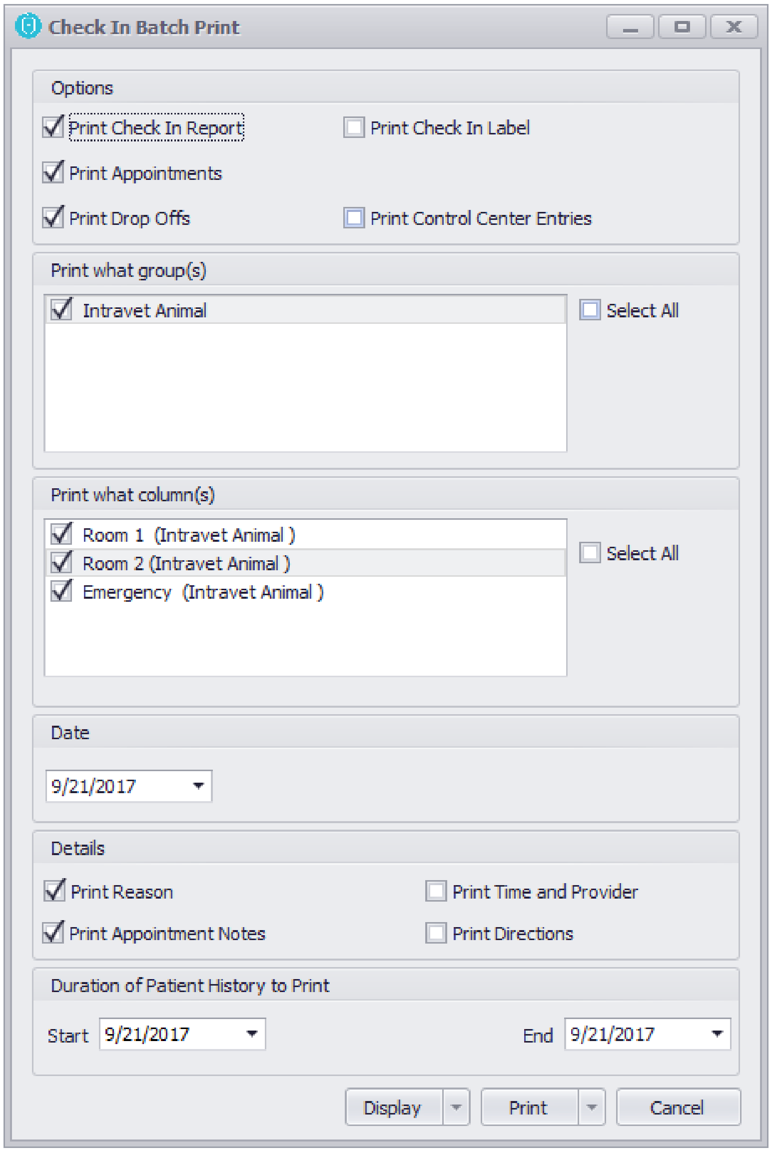
Check-in Batch Print

You can mass print check-in reports (summaries of a patient's recent history, reminders, reason for current visit, etc.) and/or check-in labels from the appointment calendar. Check-in labels are on prescription-size labels and contain general client/patient information and reminders.

- Click the Printer icon in the upper left of the appointment calendar and choose Check-in Batch.



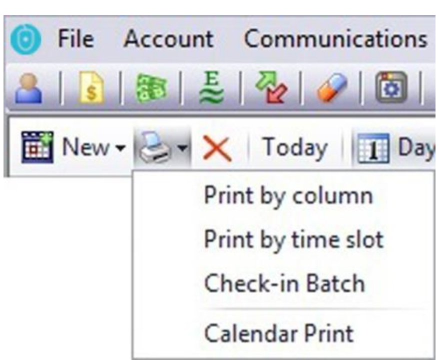
- Select from the following Options to include:
  - Print Check In Report
  - Print Check In Label
  - Print Appointments
  - Print Drop Offs
  - Print Control Center Entries
- Print what groups? – Place a checkmark in the box next to the groups to be printed. If all groups are to be printed, check the box to the right, Select All.
- Print what columns? – Place a checkmark in the box next to the columns to be printed. If all columns are to be printed, check the box to the right, Select All.
- Date – Use the down-arrow to select the Date to print them.
- Details – Check the box if you want to:
  - Print Reason
  - Print Time and Provider
  - Print Appointment Notes
  - Print Directions
- Duration of Patient History to Print – Start and End date range for history if printing check-in reports, or leave blank to print history based on check-in options for your branch.
- Click Display or Print.



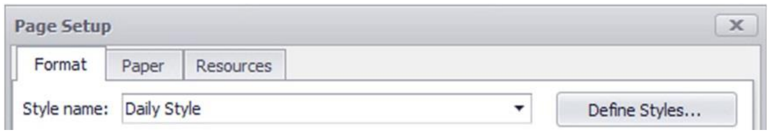
Calendar Print

You can select the print options as well as the style of calendar print.

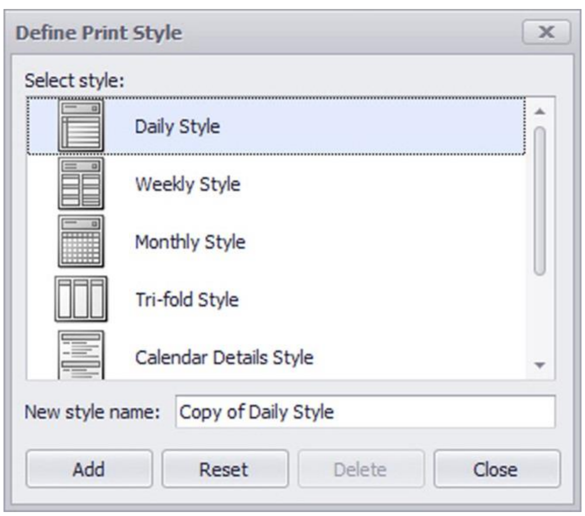
- **Click the Printer icon in the upper left of the appointment calendar and choose Calendar Print.**



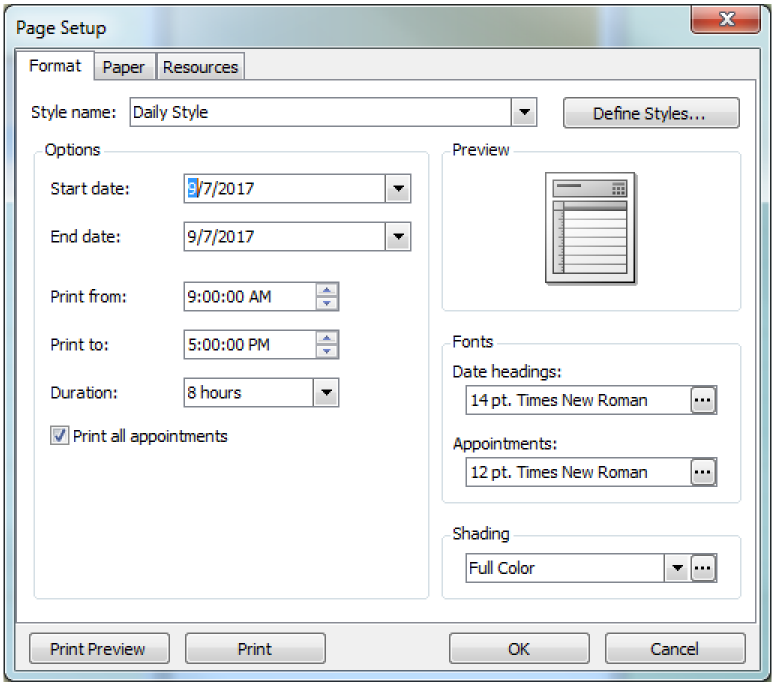
- **The Format tab opens by default. To create a new style select Define Styles…**



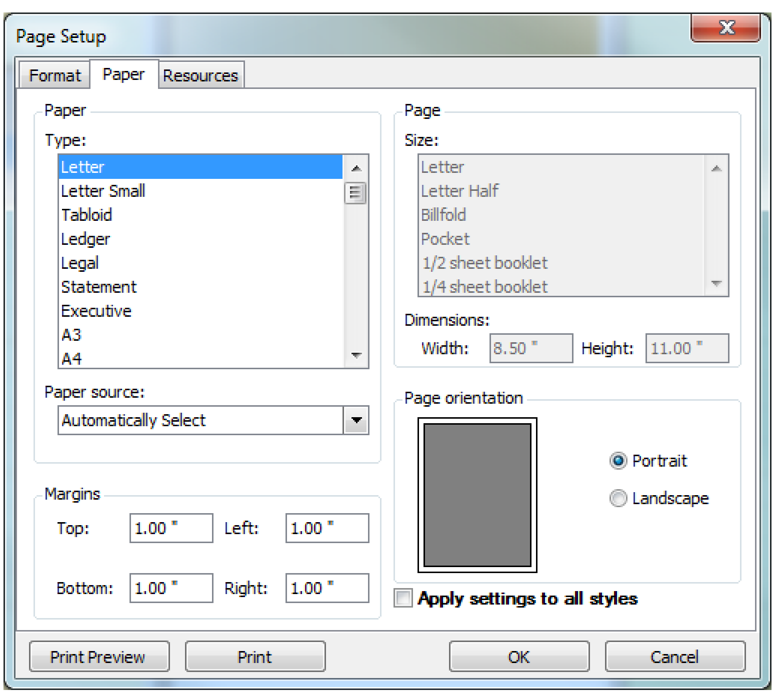
- Select from the following styles:
  - Daily Style
  - Weekly Style
  - Monthly Style
  - Tri-fold Style
  - Calendar Details Style
  - Memo Style
- Enter a New Style Name.
- Click Add or Reset. Click Close if you want to close the window without creating a new style.



- Under Options:
  - Use the down-arrow to select the Start Date and the End Date.
  - Use the down-arrow to select the Print from time and the Print to time.
  - Use the down-arrow to select the Duration.
  - Uncheck Print all appointments if you only want selected appointments printed.
- Fonts can be changed for the Date Headings and Appointments.
- Shading can be changed from Full Color to Grayscale or Black and White.
- Click Print Preview to see what your document will look like before you print. Click Print.



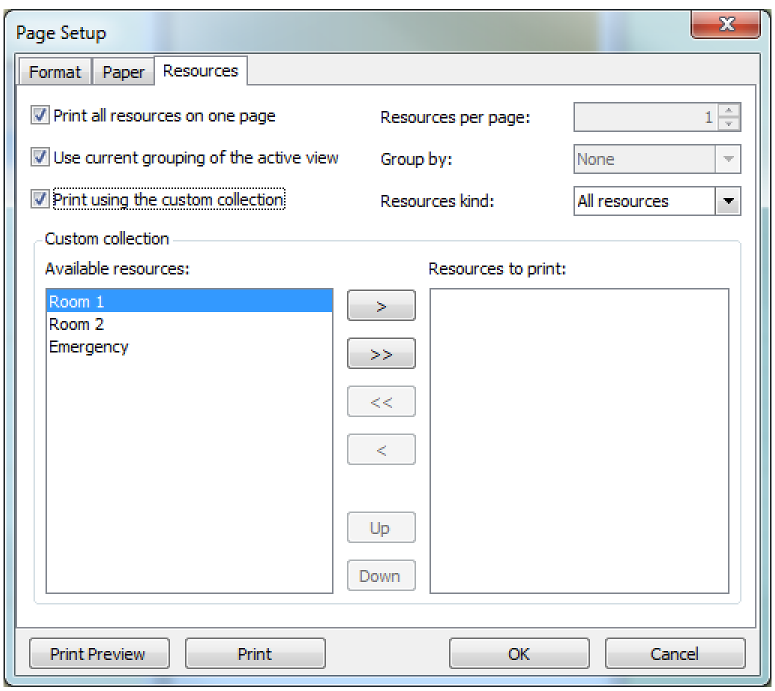
- Click the Paper tab.
- Under the Paper section, scroll to select the type you will use.
- Select your Paper Source.
- Fill in the Margins for Top, Bottom, Left and Right.
- On the right, select the Page orientation, Portrait or Landscape.
- Check the box to Apply settings to all styles, if desired.
- Click Print Preview to see what your document will look like before you print. Click Print.



- Click the Resources tab.
- Check if you want to Print all resources on one page. If unchecked, it will activate the Resources per page, to be filled in with a number.
- Check if you want to Use current grouping of the active view. If unchecked, it will activate the Group by down-arrow. The choices are None, Date and Resources.
- Check if you want to Print using the custom collection. If unchecked, it will activate the Resources kind down-arrow. The choices are All resources, Visible resources and OnScreen resources.

  If Print using the custom collection is checked it activates the Custom collection. The Available resources are listed in the left pane. To move them to the right pane (Resources to print), highlight and click the single right-arrow to move them one at a time. Click the double right-arrow to move them all at once. To move resources from the right pane to the left, highlight and click the single left-arrow to move one at a time. Click the double left-arrow to move them all at once.

  Resources in the right pane can be moved Up or Down in the list. Highlight the resource and click either Up or Down.
- Click Print Preview to see what your document will look like before you print. Click Print.

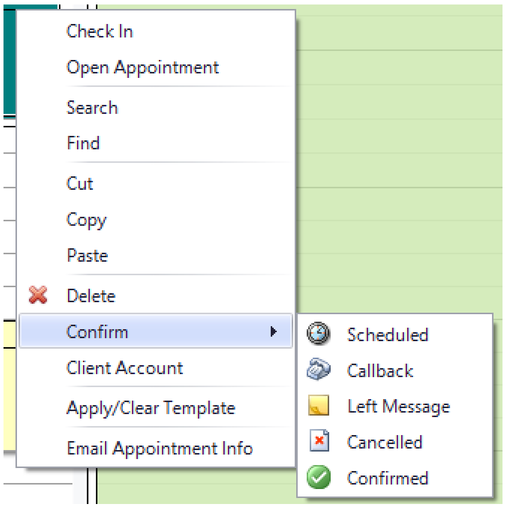


Confirming Appointments

Many practices routinely call to confirm appointments scheduled for the next day. After calling the client, you can indicate the confirmed status of an appointment.

- Right-click on the appointment in the calendar.
- Choose Confirm and then one of the following options:
  - Scheduled (clock)

- Callback (phone)
- Left Message (yellow sticky note)
- Cancelled (red X)
- Confirmed (green checkmark)



A symbol for the confirmed status (or whatever status was selected) now appears in the left of the appointment display.

These confirmed icons also appear in the Control Center (optional).

Moving Appointments

Cut/Copy and Paste appointments or blocks anywhere in the Calendar. Right-click on an appointment and select Cut or Copy. Select the new time slot, right-click and select Paste.

Inventory

Create purchase orders and process them, or receive in the inventory as it comes through the door. IntraVet has a flexible inventory management system: The more you put into it, the more information and automation you get out of it.

Inventory Setup

There are warehouses (if you have multiple branches or inventory locations), Vendor Codes, Unit Type Codes and Individual Code setups for your inventory items to put in place before fully utilizing the inventory module.

Warehouses

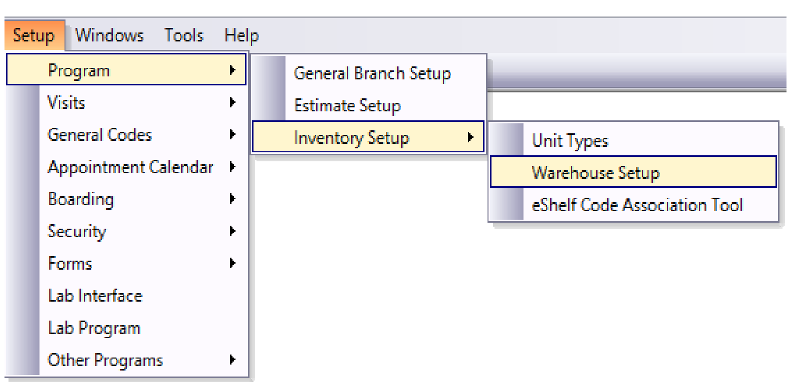
If you have separate physical branches for your practice, a main distribution center, a pharmacy or a storage area for which you want to be able to separately track inventory, you can set up separate warehouses. For the same code, you can then track different quantities on-hand, reorder levels, markup percentages and costs.

To keep each warehouse's information accurate, users need to pick the correct warehouse to both receive/return goods into and take goods out of, by invoicing or in-house use.

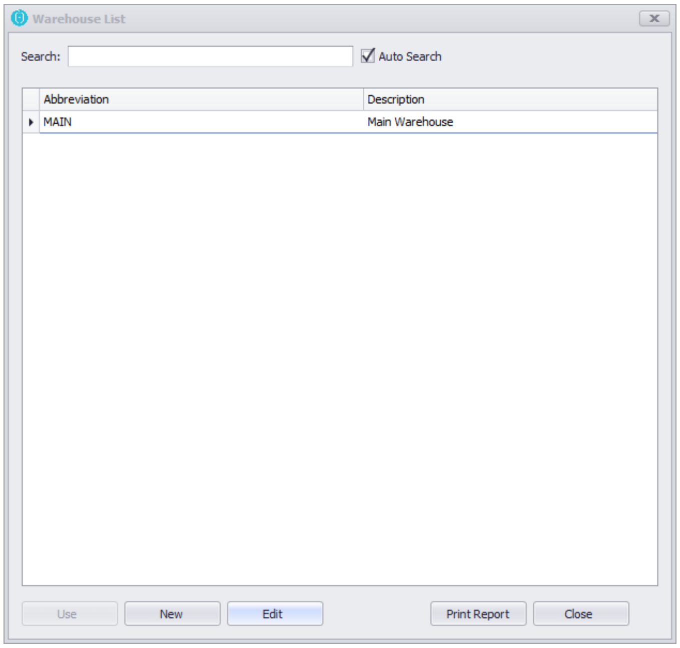
If you would like separate prices per branch and would like IntraVet to help maintain a certain markup percentage as costs increase, you must have a one-to-one branch/warehouse setup.

Set up a Warehouse

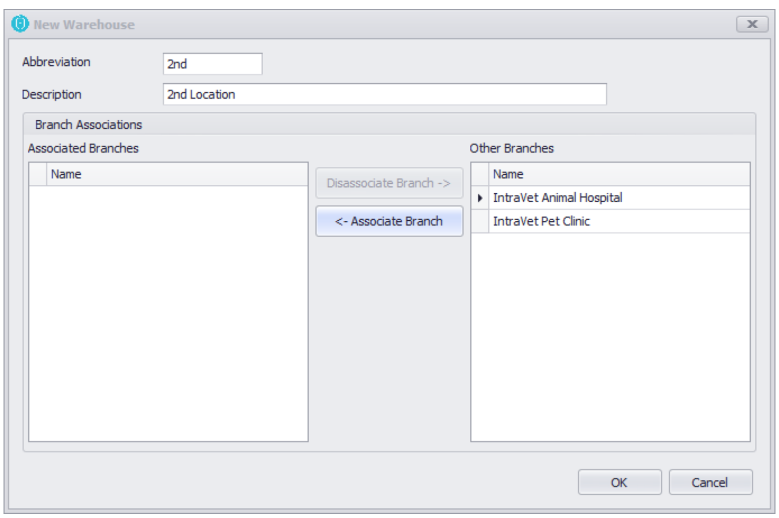
- From the IntraVet Menu Bar, select Setup | Program | Inventory Setup | Warehouse Setup.



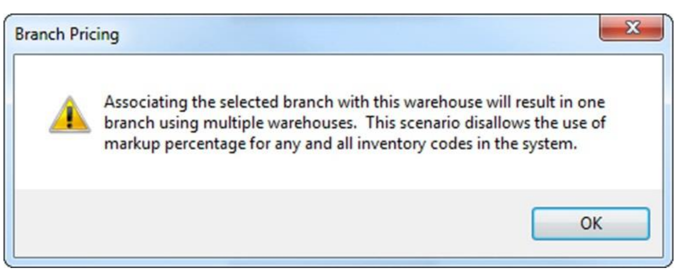
- On the Warehouse List screen click New.



- Enter an Abbreviation of up to 8 characters and a Description for the warehouse. The abbreviation remains for reference when you are logged in.
- To associate a branch, select the desired branch name. Highlight and then click Associate Branch. This will move the branch to the left pane.



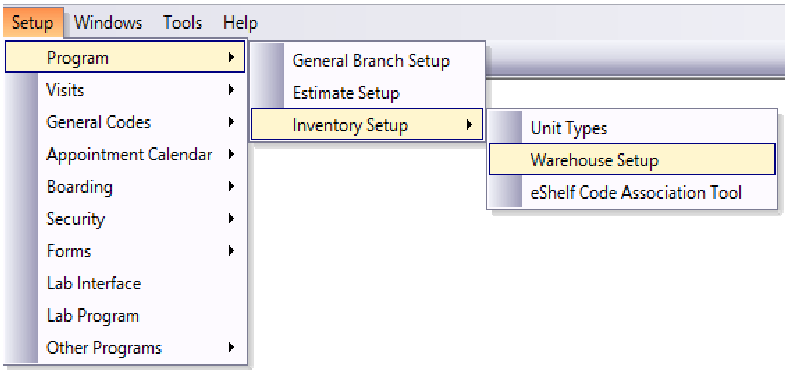
If you decide to associate this location with a branch that is also associated with another branch, the following Branch Pricing screen appears:



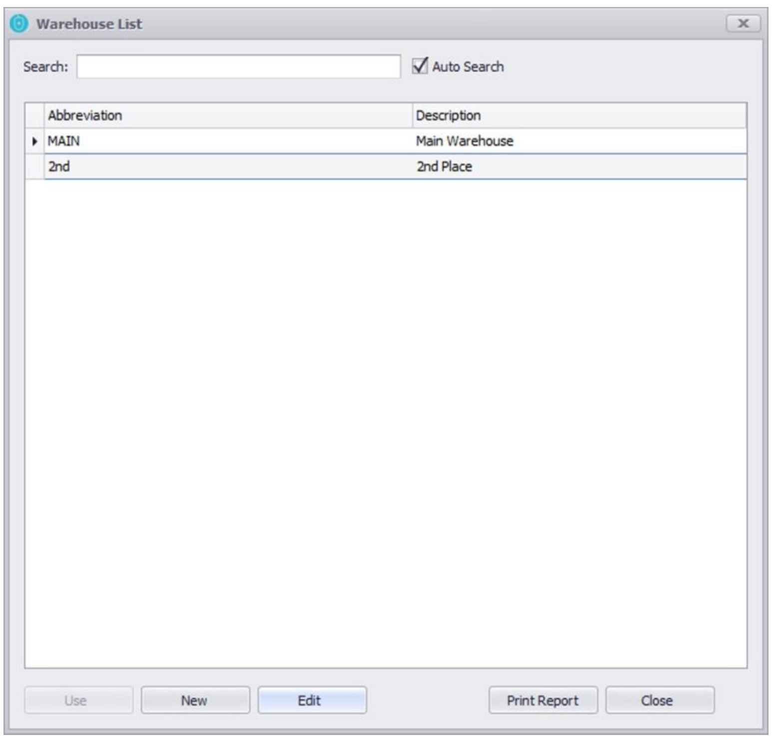
- When complete, click OK.

Modify a Warehouse

- **From the IntraVet Menu Bar, select Setup | Program | Inventory Setup | Warehouse Setup.**

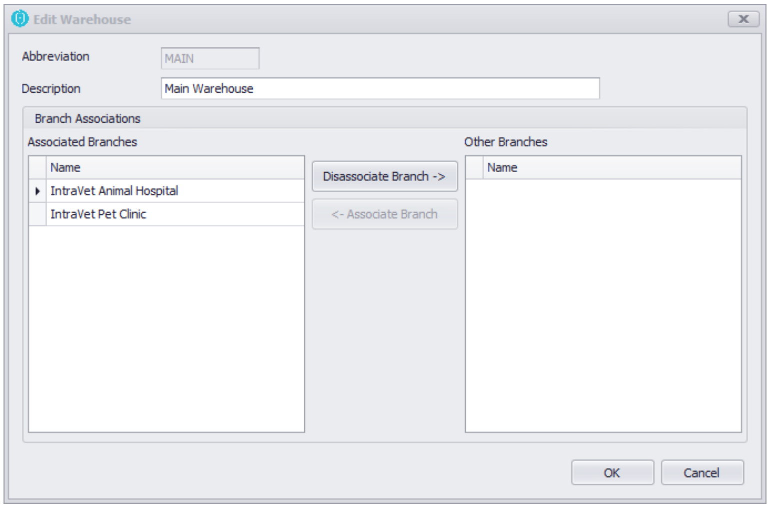


- **On the Warehouse List screen click Edit.**



- **Here you can edit the description of the warehouse but the abbreviation cannot be changed.**
- **If you want to Disassociate or Associate a branch, select it and then select the appropriate button.**

  Branches that are associated with this warehouse are listed on the left. Those disassociated are listed on the right.
- **Click OK.**

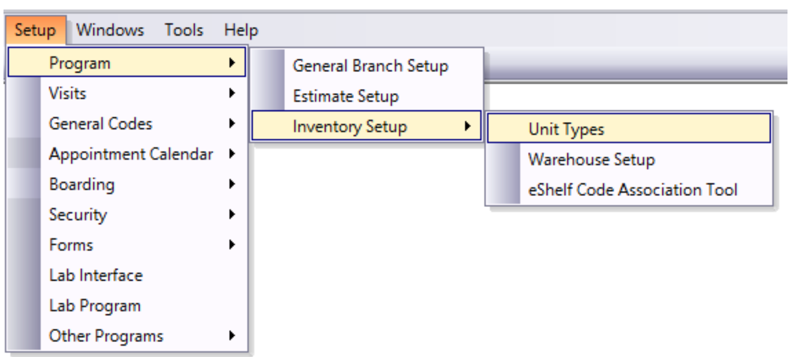


Unit Type Codes

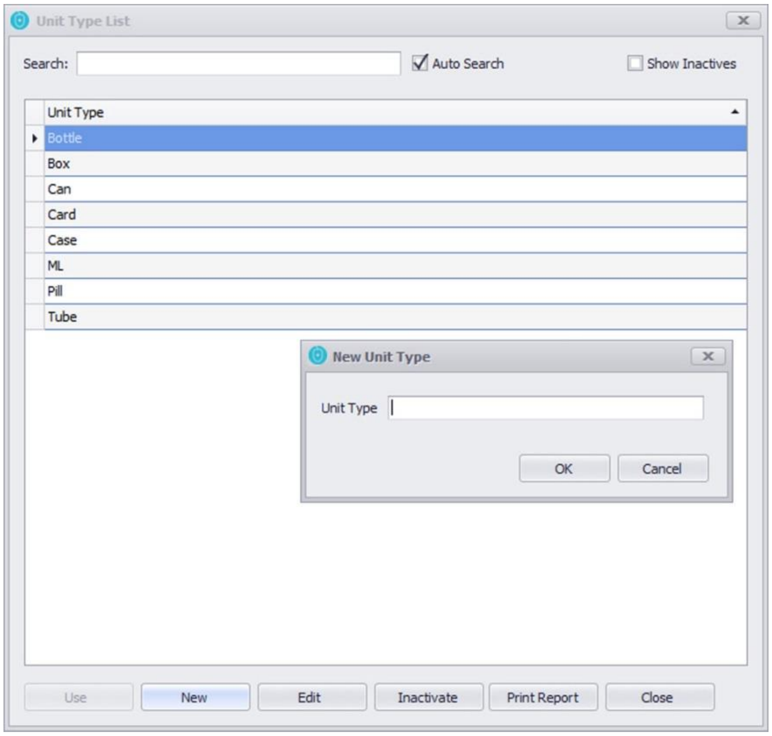
When you are receiving inventory, it is helpful to indicate how an item is packaged/sold by the vendor (bottles) versus how the practice sells or uses it (pills). As you receive each individual item, you can describe the unit as purchased (case for foods) and as sold by you to your clients (can). This association is remembered when you pull up the item for each subsequent order.

How to Add Unit Type Codes

- From the IntraVet Menu Bar, select Setup | Program | Inventory Setup | Unit Types.

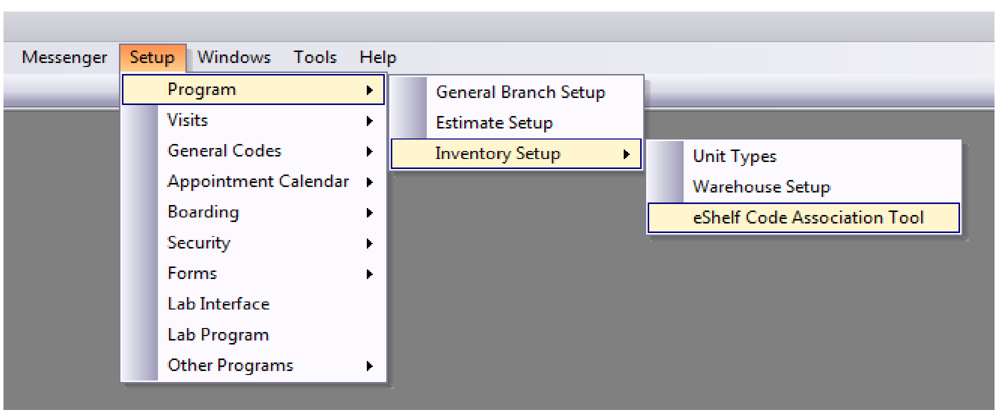


- Click New to add additional unit types or Edit to make changes to an existing unit type.
- You can also select Inactivate if you no longer want to use a particular unit type for your inventory.



eShelf Code Association Tool

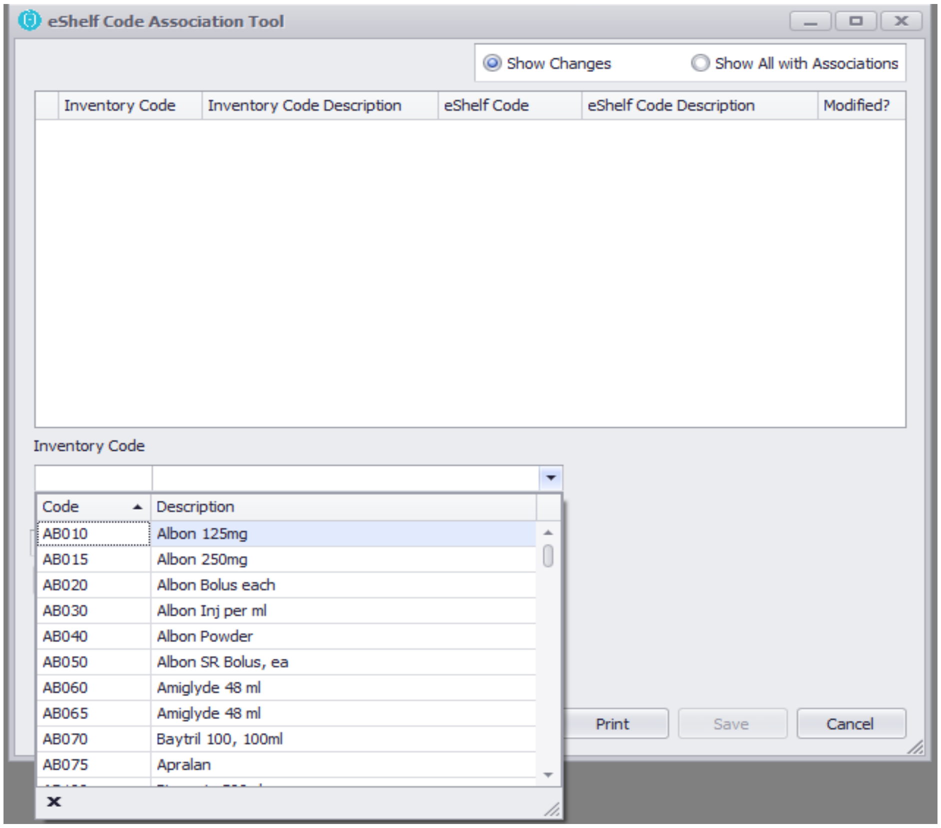
After you have enabled eShelf under Setup | General Branch Setup, you will need to set up your eShelf code association. To associate your code in mass, go to Setup | Program | Inventory Setup | eShelf Code Association Tool.



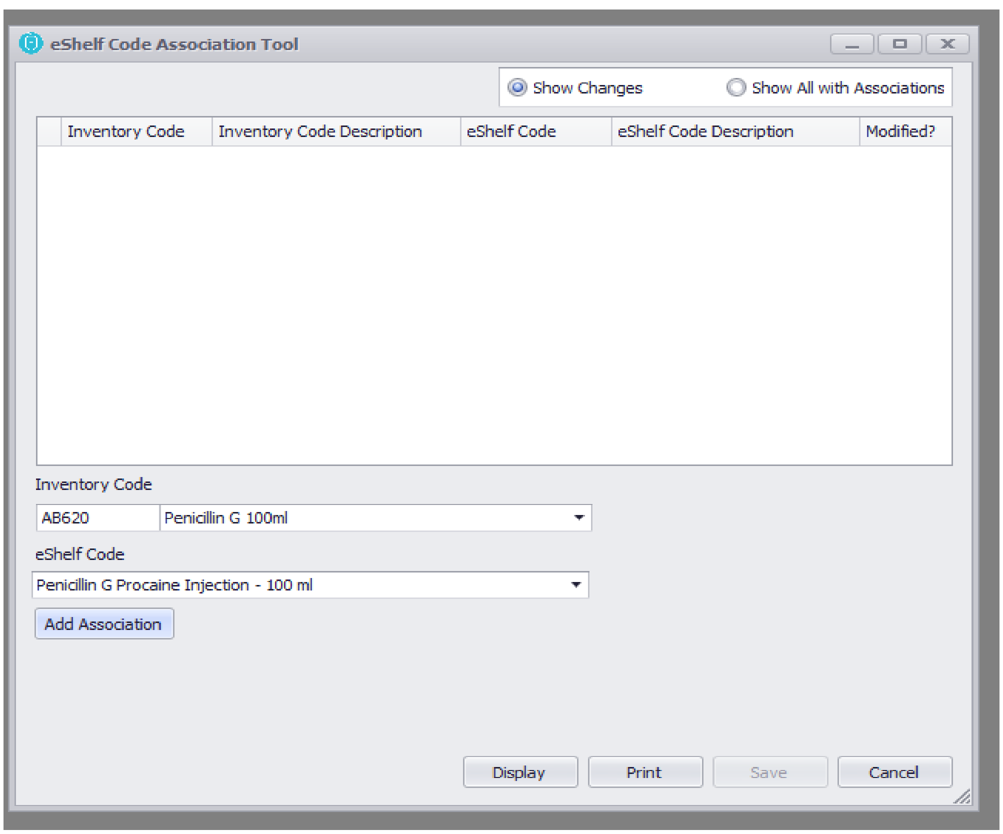
At the top of the screen you have two filter options:

- Show All with Associations, allows you to view all Codes with eShelf associations.
- Show Changes allows you to see only the changes you are making at this time.

Select the IntraVet Inventory Code from the drop-down menu at the bottom of the screen and associate it with an eShelf Code.



Click Add Association to add it to the box above.



Once you have the codes associated with eShelf, click Save to update your changes.

You can also associate your codes through Setup | General Codes | Inventory.

Select the code you want to associate with eShelf and click Edit.
Under the Purchasing tab, at the bottom of this screen you will find eShelf Code Association. Select the eShelf code you want to associate with this Inventory Code.

Click OK to save your changes.

Vendor Codes

A vendor code must be set up for each vendor that supplies your practices. When doing receipt and purchase orders, vendor information entered in vendor code setup shows for your reference. See General Codes | Vendor to set up vendor codes.

Inventory Update

If you do not want to create purchase orders and then process them, you can opt to enter inventory into IntraVet as it arrives. However, you lose the ability to automatically track what is on order. As long as the re-order and optimal quantity is set up, an item can always be pulled into a PO. PO information for an item is not available until POs are used. You can use the Reorder Report (a list of all items below reorder level) to determine what needs to be ordered.

How to Receive Inventory (without a Purchase Order)

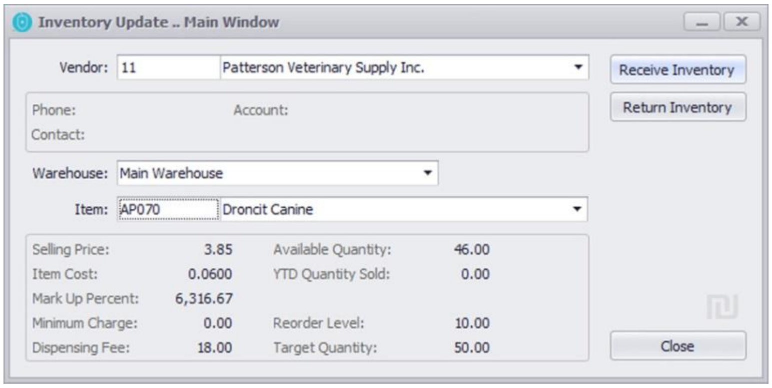
- From the IntraVet Menu Bar, select Inventory | Inventory Update.

To select the Vendor, use the down-arrow or Enter the blank field. Then scroll to find the vendor and double-click to select.

Verify the correct warehouse is displayed. To change the warehouse, use the down-arrow.

Type either the Code or Inventory item name into the blank field, or use the down-arrow and scroll to your selection.

Click Receive Inventory.



- Units – Number of units purchased from the vendor (bottles, cases, etc.). If the unit types have already been defined for this code it defaults to those descriptions.
- No. Per Unit – Number of items in the unit purchased. If 1 case of dog food was purchased that has 24 cans, enter in 1 unit and the no. per unit would be 24.
- QTY (as Sold) – This number automatically calculates. Units (as purchased) x # No. per Unit. 3 (Units as purchased) x 150 (Per Unit) = 450 Qty for the practice to sell or use.
- Last Qty – Shows the last quantity that was received.
- New QoH – Lists the New Quantity on-hand.
- Unit Cost – Enter the Cost as purchased from the vendor (by the bottle or case).
- Total Cost – This amount calculates automatically as Units (as purchased) x Unit Cost.
- Date – Defaults to the current date but may be changed to a previous date.
- Product Code and Description (optional). Enter the vendor's product information.
- Note (optional).
- Expiration Date – If you have denoted this code as perishable, you must choose an expiration date. Prescription labels sold from this shipment default to this date.
- Manufacturer Number – Enter the shipment's manufacturer number, if needed.
- Sale/Free – Check this box if you want this item treated as an exception. If this box is checked, the cost of this item is ignored when calculating average costs for this product, and you will not be prompted to update the price based on this cost change.
- Inventory history for this one item is listed in the grid below, most recent first. Scroll down to see more.

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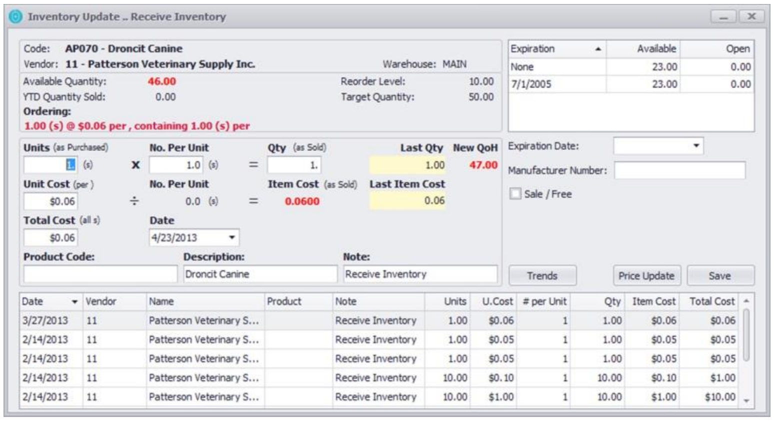
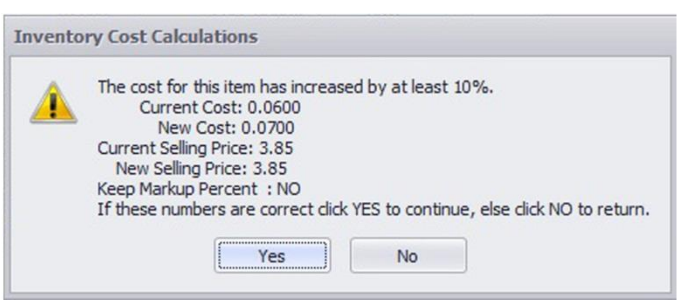


- Trends – Click this button to see statistics on how much of this product has been purchased and sold for the current and past month and year. Turnover ratios (Purchased/Sold) and Average sold per week are also calculated for your reference.
- Price Update – Gives access to information on the Purchasing tab.

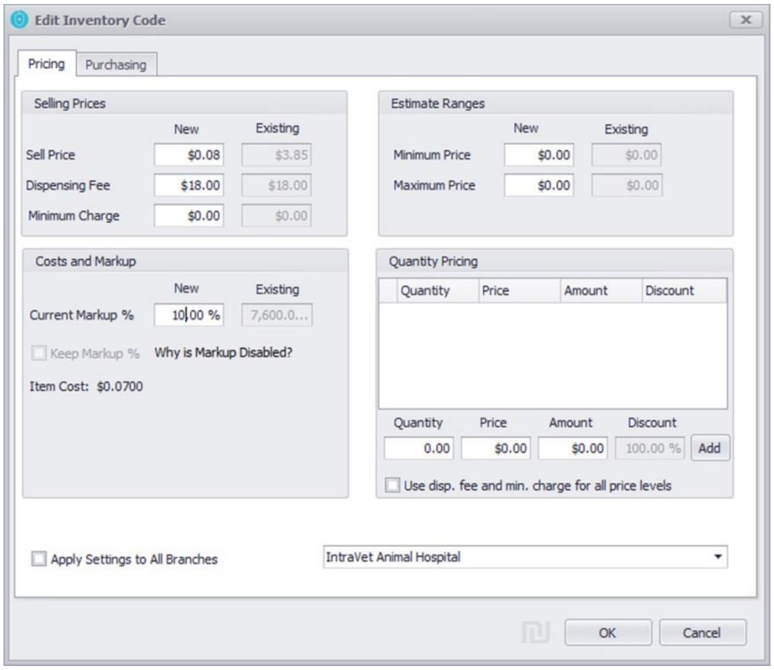
- When all of the data is entered, click Save.
- If the cost has changed, a notification appears and you can choose to update the price. Click Yes to change the pricing or No to leave it as is.

If you choose No, the Inventory Cost Calculations window displays current and new cost information.



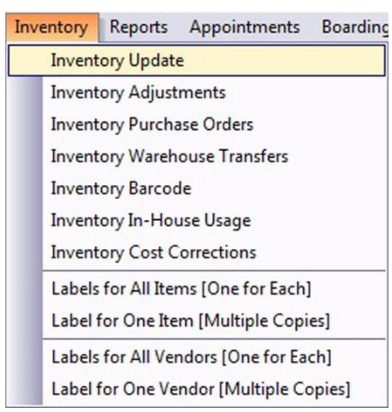
If you choose Yes, the Edit Inventory Code window displays with Pricing Information and Purchasing Information.

- **Adjust Selling Price and/or Current Markup %. If you have the code set to Keep Markup %, your suggested price is already calculated and you just need to confirm.**

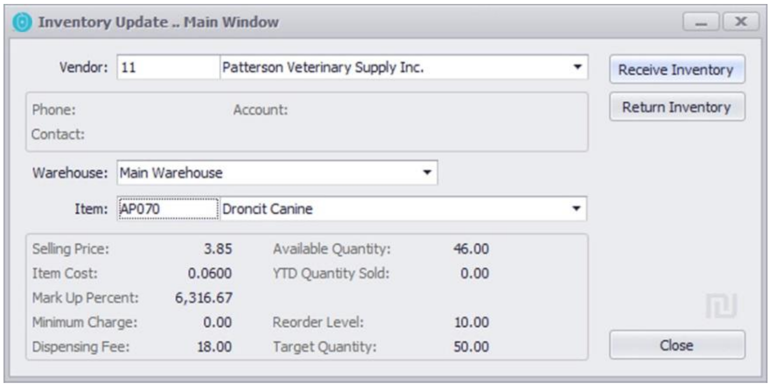


How to Return Inventory to the Vendor

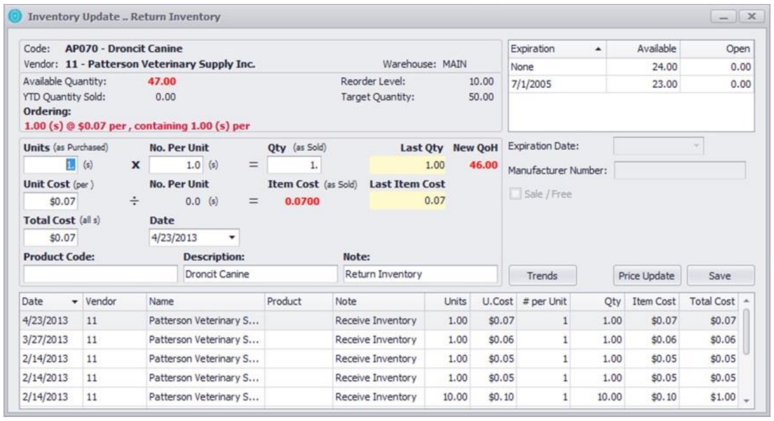
- **From the IntraVet Menu Bar, select Inventory | Inventory Update.**



- **To select the Vendor, use the down-arrow or Enter the blank field. Then scroll to find the vendor and double-click to select.**
- **Verify the correct warehouse is displayed. To change the warehouse, use the down-arrow.**
- **Type either the Code or Inventory item name into the blank field, or use the down-arrow and scroll to your selection.**
- **Click Return Inventory.**



- **Units – Number of units purchased from the vendor (bottles, cases, etc.). If the unit types have already been defined for this code it defaults to those descriptions.**
- **No. Per Unit – Number of items in the unit purchased. If 1 case of dog food was purchased that has 24 cans, enter in 1 unit and the no. per unit would be 24.**
- **QTY (as Sold) – This number automatically calculates. Units (as purchased) x # No. per Unit. 3 (Units as purchased) x 150 (Per Unit) = 450 Qty for the practice to sell or use.**
- **Last Qty – Shows the last quantity that was received.**
- **New QoH – Lists the New Quantity on-hand.**
- **Unit Cost – Enter the Cost as purchased from the vendor (by the bottle or case).**
- **Total Cost – This amount calculates automatically as Units (as purchased) x Unit Cost.**
- **Date – Defaults to the current date but may be changed to a previous date.**
- **Product Code and Description (optional). Enter the vendor's product information.**
- **Note (optional).**
- **Expiration Date – If you have denoted this code as perishable, you must choose an expiration date. Prescription labels sold from this shipment default to this date.**
- **Manufacturer Number – Enter the shipment's manufacturer number, if needed.**
- **Sale/Free – Check this box if you want this item treated as an exception. If this box is checked, the cost of this item is ignored when calculating average costs for this product, and you will not be prompted to update the price based on this cost change.**
- **Inventory history for this one item is listed in the grid below, most recent first. Scroll down to see more.**

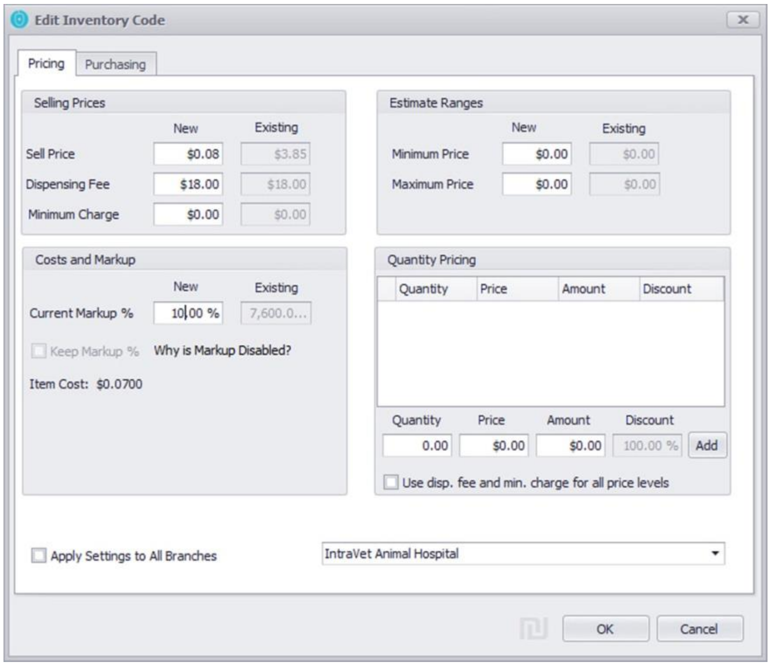


- **Trends – Click this button to see statistics on how much of this product has been purchased and sold for the current and past month and year. Turnover ratios (Purchased/Sold) and Average sold per week are also calculated for your reference.**
- **Price Update – Gives access to information on the Purchasing tab.**

- **When all the data is entered, click Save.**
- **If the cost has changed, a notification appears and you can choose to update the price. Click Yes to change the pricing or No to leave it as is.**

If you choose Yes, the Edit Inventory Code window displays with Pricing Information and Purchasing Information .

- **Adjust Selling Price and/or Current Markup %. If you have the code set to Keep Markup %, your suggested price is already calculated and you just need to confirm.**



Inventory Adjustment

In general, you should rarely have to adjust items because there are other tools in place to accurately receive and deplete your stock as needed. Inventory adjustments allow you to do three things:

- Deplete inventory, in case a portion is unusable,
- Enter an amount after doing a physical inventory count, and
- Control lot management (the allocation of a quantity to a specific expiration date).

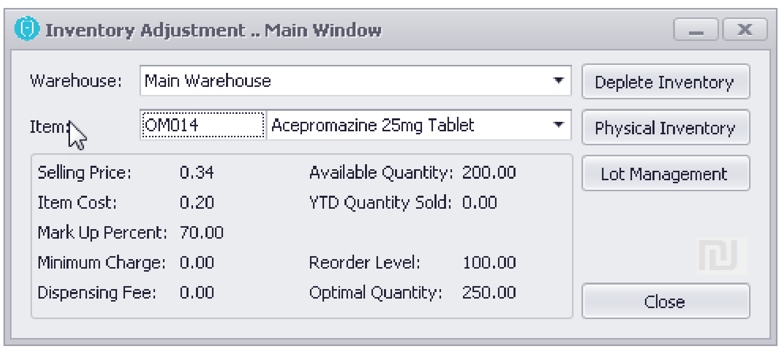
Deplete Inventory

Reduce the inventory item by whatever number you deplete. For example, if you drop an item or an item has expired you can deplete the quantity on hand. The number that you deplete by is always as used or sold by the practice. In-house use or returns to the vendor may be a more accurate way to deplete your stock. Invoicing items out to clients automatically depletes the quantity on-hand.

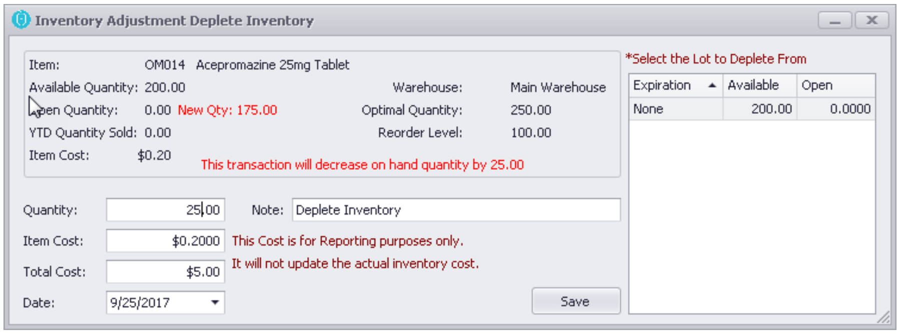
How to Deplete Inventory for a Code

- From the IntraVet Menu Bar, select Inventory | Inventory Adjustments.

- Double-click or type the first few letters of the item into the blank entry line. Locate the item and double-click on it to move it to the line.
- Select the appropriate Warehouse.
- Click Deplete Inventory and the Inventory Adjustment Deplete Inventory window appears.



- Enter the amount to reduce inventory by in the Quantity field. (This is the number of pills/cans used.) The value of the inventory depleted is based on either the Item Cost or Total Cost and the Quantity entered. The new quantity on-hand displays in red.
- In Note enter a brief explanation why the inventory is adjusted, if desired.
- You can change the Date by clicking the down-arrow and making a selection from the calendar.
- The right pane displays information regarding the code's lots: Expiration dates, current Available quantity and quantity outstanding in pending charges (Open). A lot is a group of items that share the same vendor and expiration date (usually all received the same date).
- Click Save.



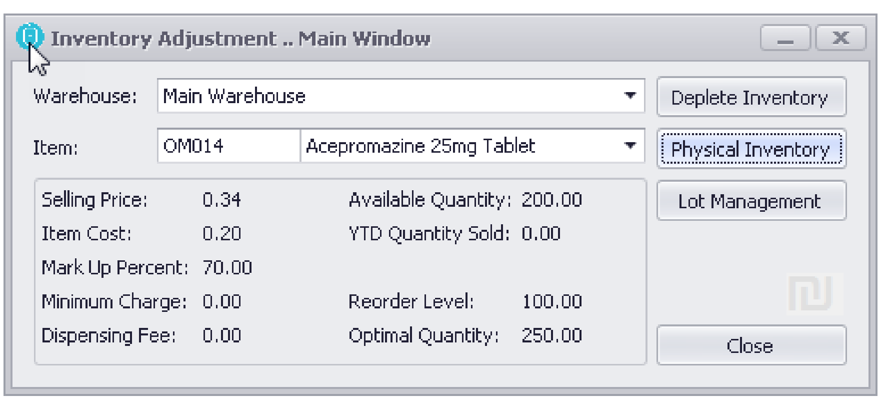
Physical Inventory

This area is used when updating your inventory to what you currently have in your practice at the time you enter this quantity. This amount is the physical count of your items including items used for in house and items on temporarily saved invoices (Work in Progress). When you do an inventory adjustment, it allows you to make a change and uses that information going forward.

How to Create a Physical Inventory Adjustment (Reset)

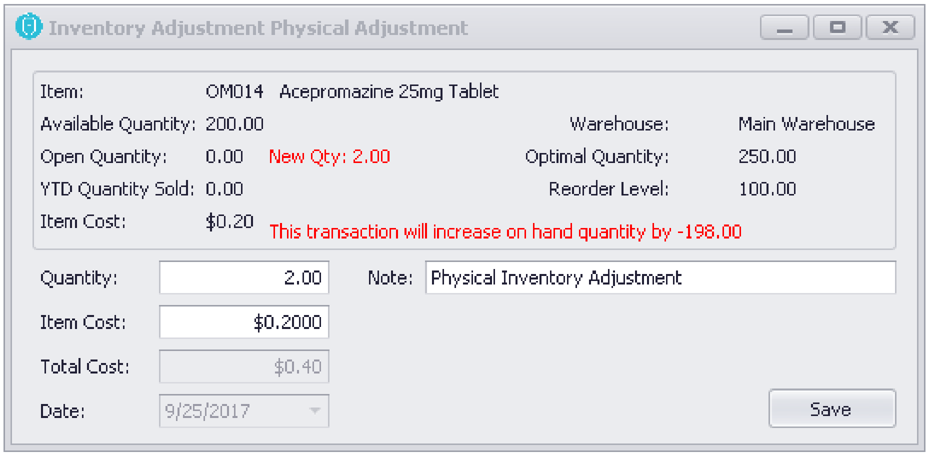
- **From the IntraVet Menu Bar, select Inventory | Inventory Adjustments.**

- **Double-click, or type the first few letters of the item into the blank entry line. Locate the item and double-click on it to move it to the line.**
- **Select the appropriate Warehouse.**
- **Click Physical Inventory and the Inventory Adjustment Physical Adjustment window displays.**



- **Enter in the current quantity on-hand (the number of pills/cans available to sell or use) in the Quantity field. The new Quantity displays in red.**

- Enter the Item Cost. The cost is the cost per pill/can as you use or sell it.
- Add a Note, if desired.
- Click Save.



Inventory Lot Management

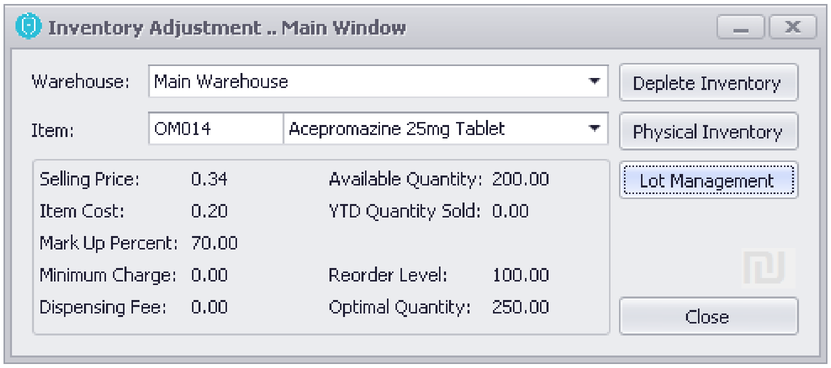
A lot is a collection of the same item or code with the same expiration date. Generally, a lot is created when purchased at the same time from the same vendor. You can track expiration dates so that you know which perishable items have a certain expiration date.

IntraVet gathers expiration dates from you when you receive inventory and assumes that you want to sell the older lots first (the ones with closer expiration dates). You can directly manage and edit existing lots and their expiration dates, if needed.

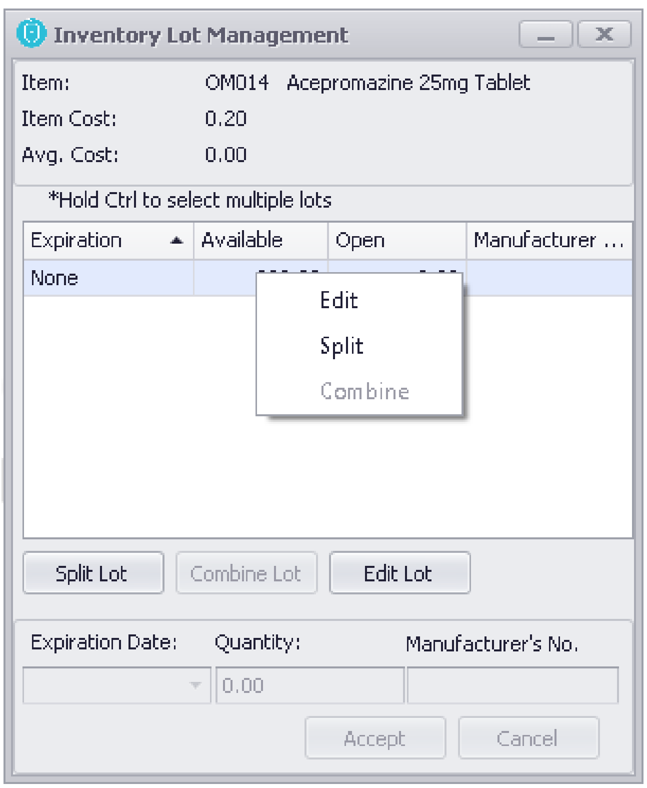
How to Edit Lots (Expiration Dates)

- From the IntraVet Menu Bar, select Inventory | Inventory Adjustments.

- Double-click, or type the first few letters of the item into the Item blank entry line. Locate the item and double-click on it to move it to the line.
- Select the appropriate Warehouse.
- Click Lot Management and the Inventory Lot Management window displays. Each lot shows as a separate line with its own Expiration date, Available quantity, Open invoice quantity and the Manufacturer.



- Click Edit (or right-click and choose Edit) to edit the expiration date of a lot. Use the down-arrow to the right of the expiration date at the bottom of the window to select a new expiration date.
- Click Split Lot (or right-click and choose Split) on a lot to separate it into multiple lots.
- You can also select Combine Lot to merge one lot with another lot. The active lot turns red until you right-click and choose Combine again on another lot.
- Click Accept or Cancel.



Purchase Orders

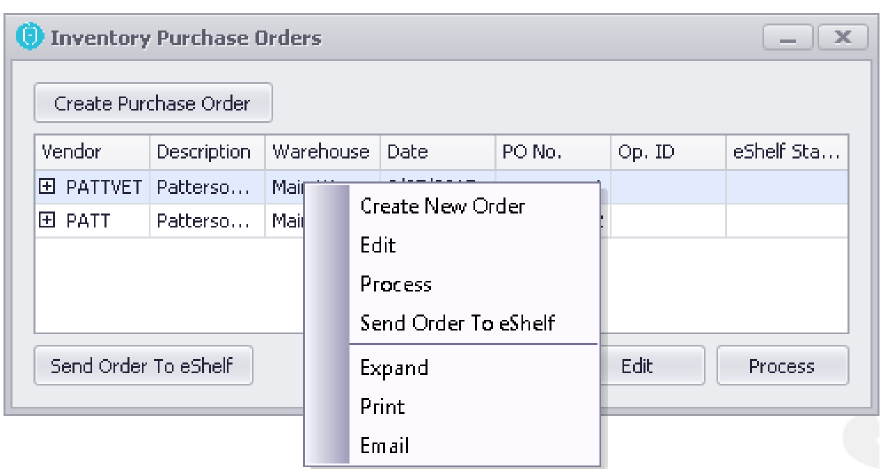
Purchase orders are a way to order items that have fallen below the reorder level from the chosen Vendor. You can quickly create a purchase order to print, email or fax to your Vendor. You do not have to use purchase orders to receive inventory.

The Purchase Order Window

Purchase orders in progress display here. These are purchase orders that have one or more items still outstanding.

- From the IntraVet Menu Bar, select Inventory | Inventory Purchase Orders.

- Purchase orders in progress display here. These are purchase orders that have one or more items still outstanding.
- From the Inventory Purchase Orders window, you can right-click on an existing PO and choose to do the following actions:
    a. Create New Order – Create a new Purchase Order.
    b. Edit – Select to change or add items on an existing Purchase Order.
    c. Process – Process a Purchase Order to indicate items have actually been received (all at once or each code one-by-one as necessary).
    d. Expand – View individual line items on a Purchase Order.
    e. Print – Print an individual Purchase Order.
    f. Email – Email the Purchase Order to the vendor email address on record (in Vendor Code Setup). You must have your practice's email information entered in the branch email setup.



How to Create a Purchase Order

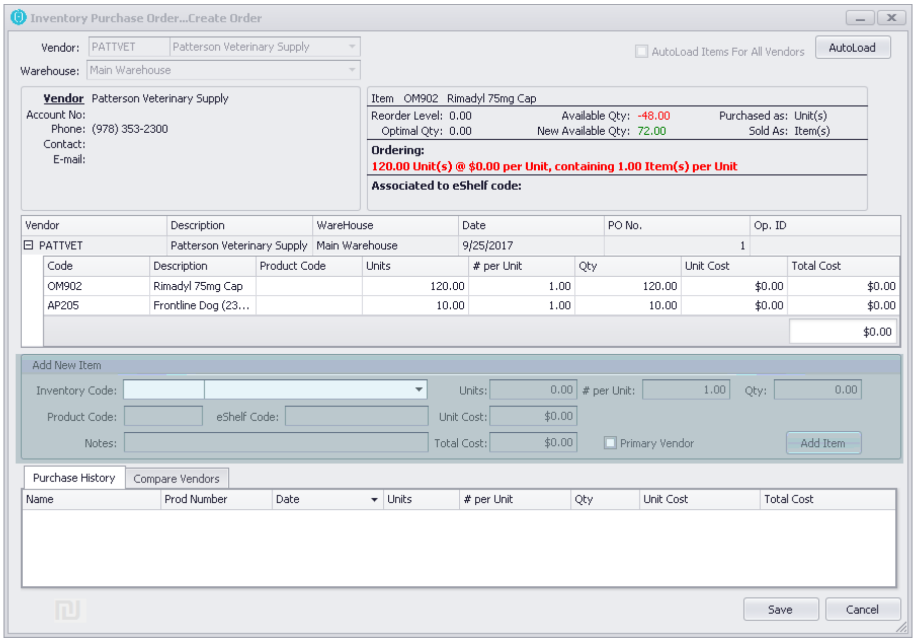
- Select the Create Purchase Order button in the Inventory Purchase Orders window.

- Select your vendor by clicking the down-arrow to the right of the blank field at the top of the window. Your vendors are defaulted or prompted for each code.

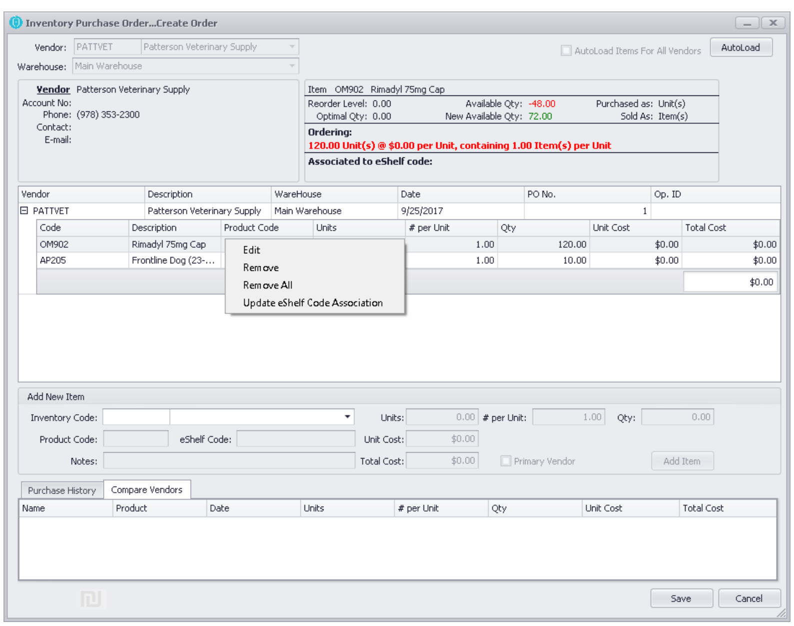
  When a Vendor is selected, AutoLoad (optional) pulls all items for the vendor that are below the reorder level as well as all items that are below the reorder level with no Vendor attached.

  - AutoLoad – IntraVet uses the primary vendor for a code if there is one, or the last vendor if there is no primary vendor set up. When there is neither a primary code nor a last vendor, you are prompted to select one.
  - All codes below reorder level load if you checked AutoLoad Items for All Vendors.
- You can enter other codes that you want to add to the PO. Click the down-arrow or Enter the code/description line midway down the window labeled Inventory Code.
- Press Enter when the correct one has been selected. The description field grays out, and the fields that request further information activate.
  - Product Code – Optional (the vendor's number for the item).
  - Units – Enter the number of Units as you purchase them from the vendor, e.g., 10 (bottles).
  - # per Unit – Enter the number in each unit as the practice sells or uses them, e.g., 150 (pills). Leave it at 1 if it is something like bags of dog food that are sold to the clients in the same unit as is purchased from the vendor.
  - Qty (Quantity) – The quantity as the practice uses/sells it (number of pills, MLs, etc.). It is calculated automatically (Units x # per Unit = Qty).
  - Unit Cost – Enter if known (sometimes you do not know until the items are received). The Unit Cost is how much the vendor charges per Unit as the vendor sells it. IntraVet calculates your cost per unit for you based on the # per Unit that you enter.
  - The Total Cost is calculated as the Units x Unit Cost.

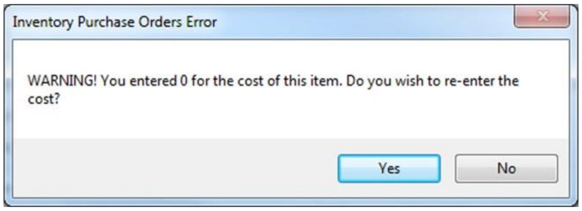
If your mouse has a scroll wheel, use the wheel to increase or decrease a price/qty when the cursor is placed in a field.



- Enter a Note, if desired.
- Check the Primary Vendor box (optional). This will associate the code to the vendor for more automated loading of POs and for your reorder report.
- Click the Add Item button to move the line into the grid.
- The screen will open to the Purchase History tab by default. Click the Compare Vendors tab if you wish to see a quick pricing comparison of what each vendor last charged you for the code.
- If you need to Edit or Remove a line item, right-click and select. You can also choose to Remove All and begin again.

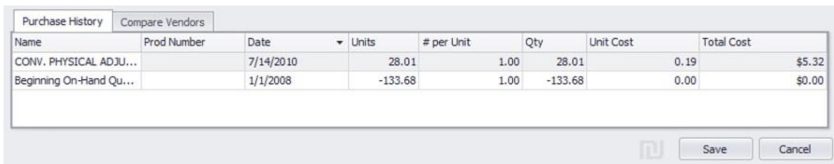


A prompt asks for a cost to be entered if one was not supplied, but you can continue without entering it.

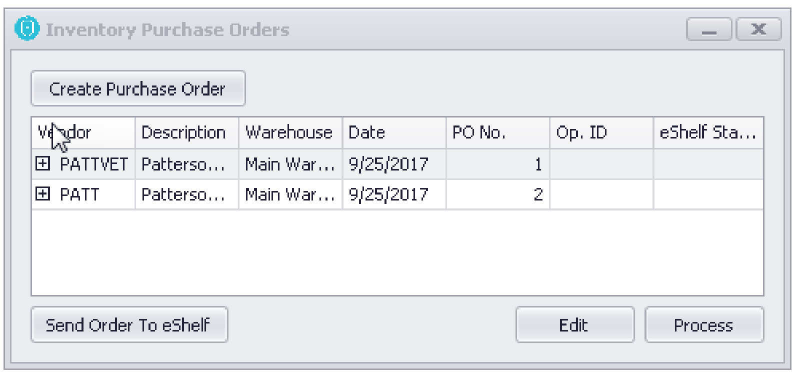


If you already have the same code on order in a different PO, you will also be notified, but choose to continue.

- Click Save.



You now see your new PO in the Inventory Purchase Orders window.

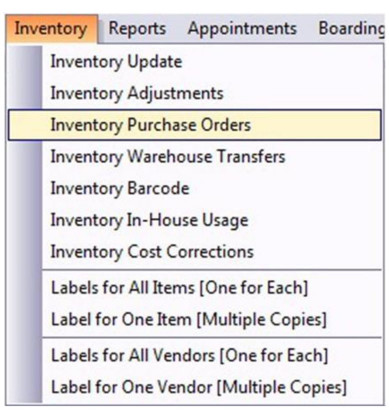


Process Purchase Orders

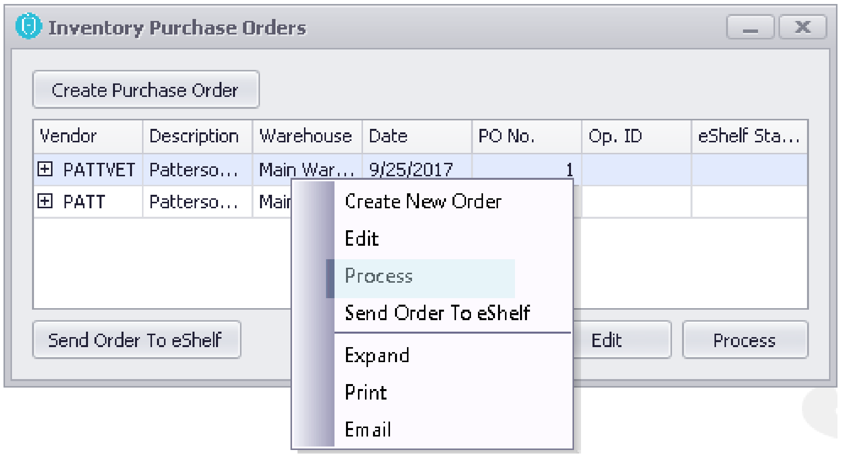
When you receive items in your purchase order, you can process them to show they are now on the shelf and available for use. All items in a PO can be processed at once (if you have received everything as ordered), or you can partially process the PO if only some items have arrived. The entire PO remains in the Purchase Order window until all items have been fully received.

How to Process a PO

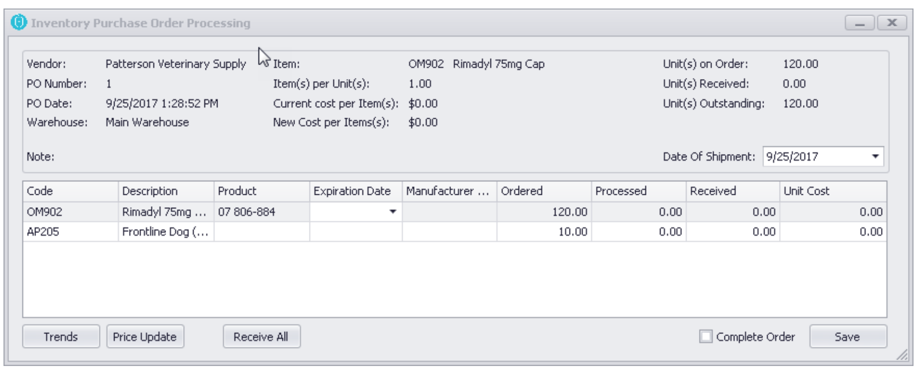
- From the IntraVet Menu Bar, select Inventory | Inventory Purchase Orders.



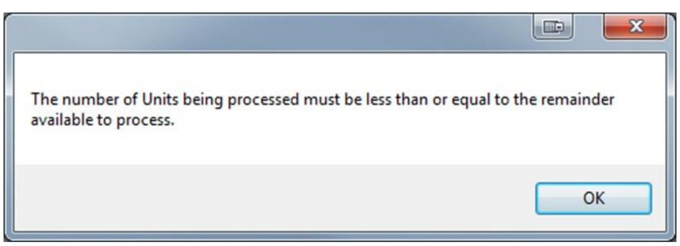
- Right-click on the PO and choose Process.



- Enter Product number (optional).
- Enter an expiration date, if needed.
- Type the manufacturer number (optional).
- If all items (or most) are received, click the Receive All button at the bottom of the screen. This changes the Received amount to match the Ordered amount on all codes. You can still change individual line items if needed before saving.
- To change Received one code at a time on the PO, type the number received in the Received column.

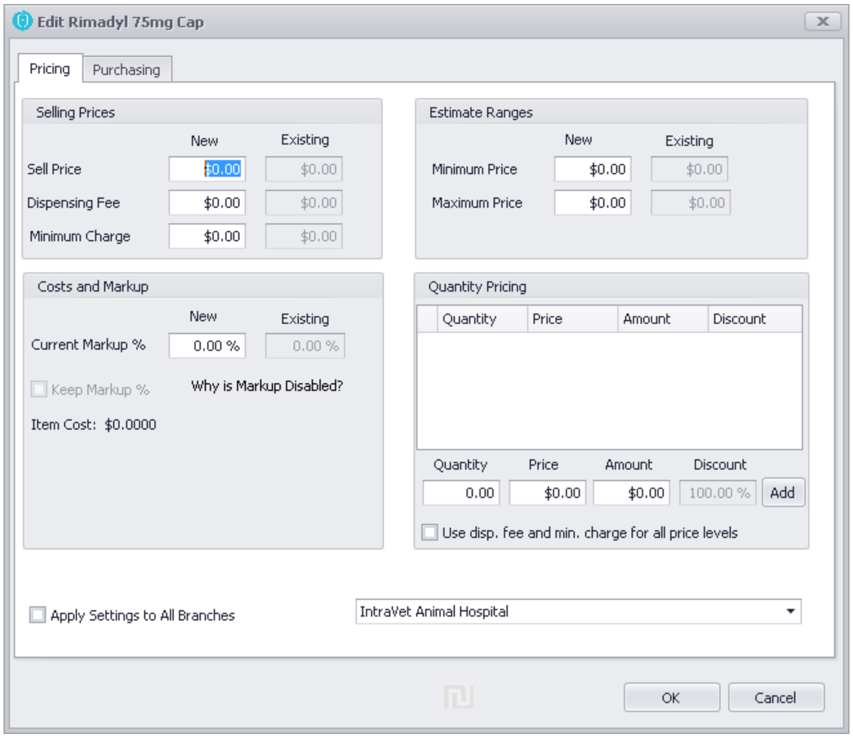


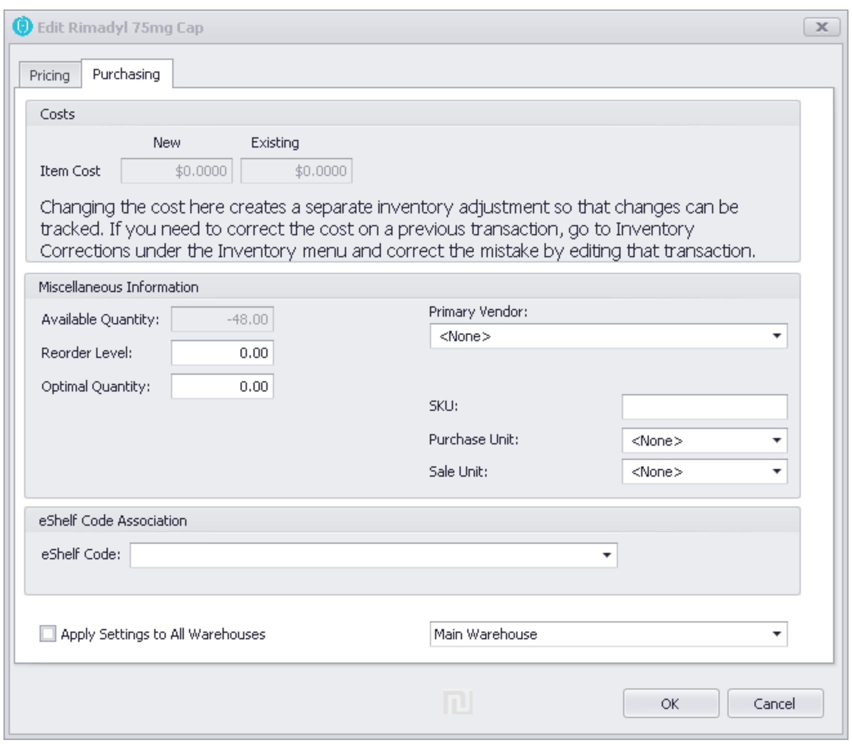
You cannot receive more than the quantity originally ordered. Edit the PO if you need to change the quantity ordered.



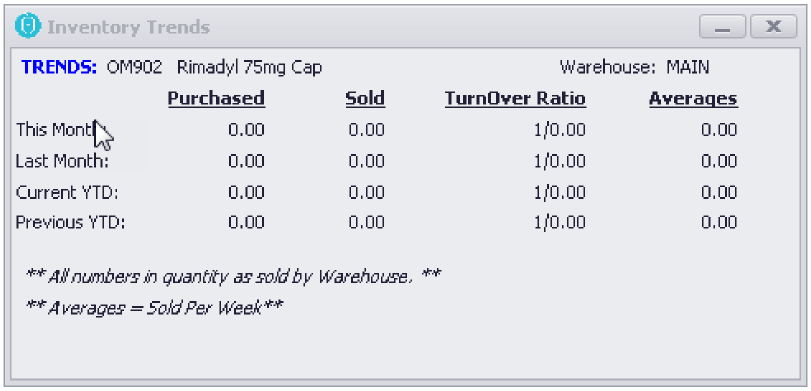
- If the cost has changed, you can choose to update the price. Click the Price Update button. The Edit window for the highlighted item appears with Pricing and Purchasing.
- View the New and Existing cost/price data. If you have the code set to Keep Markup %, your suggested price is already calculated and you just need to confirm it.

- You can overwrite the price or type a new markup percent in the current Markup % field to change the price.
- Click OK.





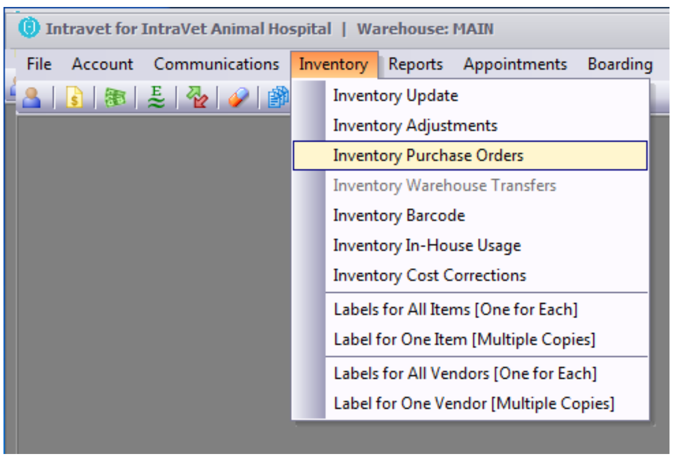
- Click Save when you have finished updating. The PO no longer appears in the Purchase Order window if all items have been received. You can search the PO Report (IntraVet pull-down menu – Reports/Inventory Reports) for historical PO information.



Ordering through eShelf – Patterson Veterinary Supply

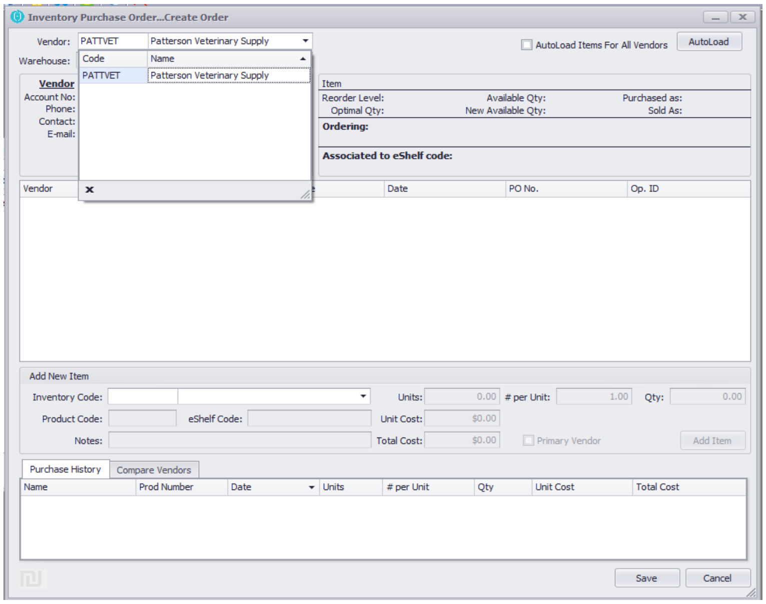
After you have completed the codes setup, you can start ordering.

- Go to Inventory | Purchase Orders and select Create Purchase Order.

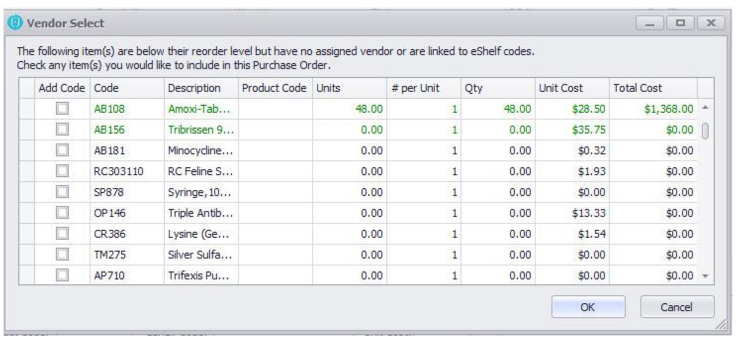


- To order from eShelf, you will need to select your Patterson Vendor.

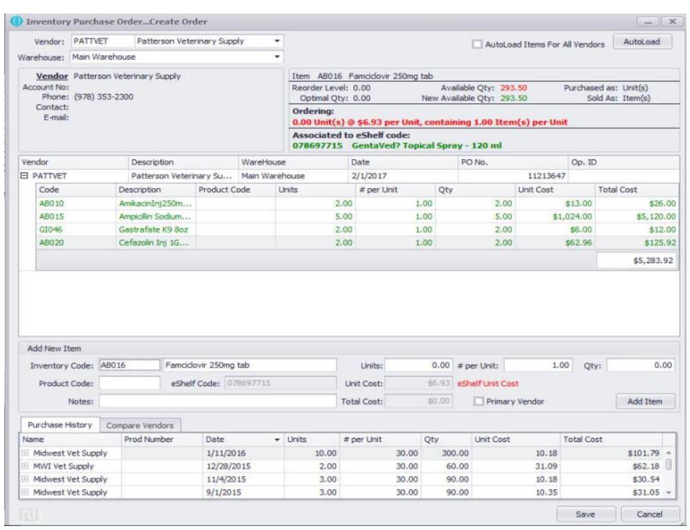
- You can select the Auto Load button at the top of the screen to automatically load any items below the reorder level.



- Here you can select the items you want to order from eShelf by checking the box next to the items in green and clicking OK.



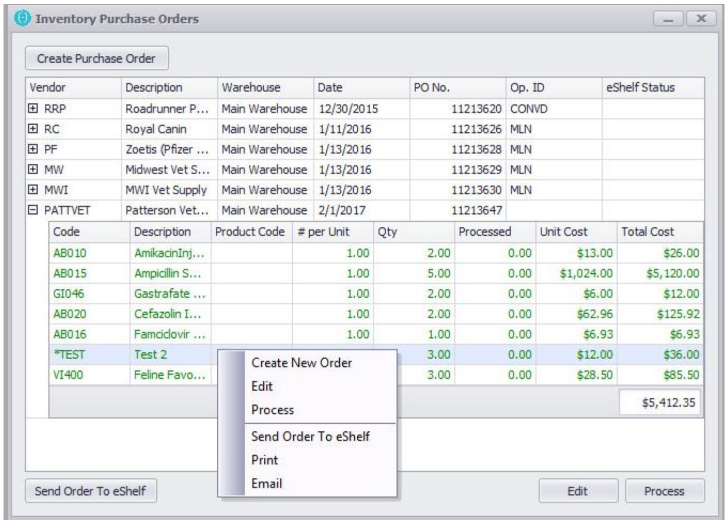
- Now you can see the items within the purchase order screen. eShelf items are showing in green. The unit Cost that you see in this screen is the eShelf pricing.



- If you see any items in black they are not associated with eShelf. You do have the option to right mouse click and select Update eShelf Code Association to associate this code with an eShelf code.

- Once you have entered all your codes for this order, click Save and it will populate in the Purchase Order list.

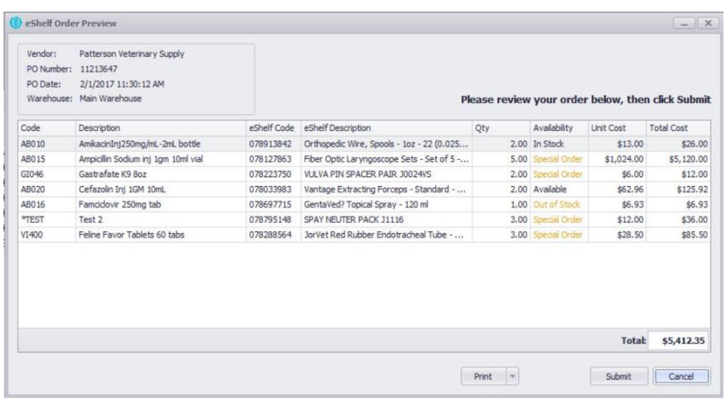
- Now you can send your items to eShelf by clicking the Send Order to eShelf button or by right mouse clicking on the order and selecting Send Order to eShelf.



- Once you click Send Order to eShelf you will see the eShelf Order Preview screen; this allows you to review your order.

- You will notice an Availability column; this will let you know if the item is Out of Stock, Special Order or Back Ordered.

- Click Submit to submit your order.



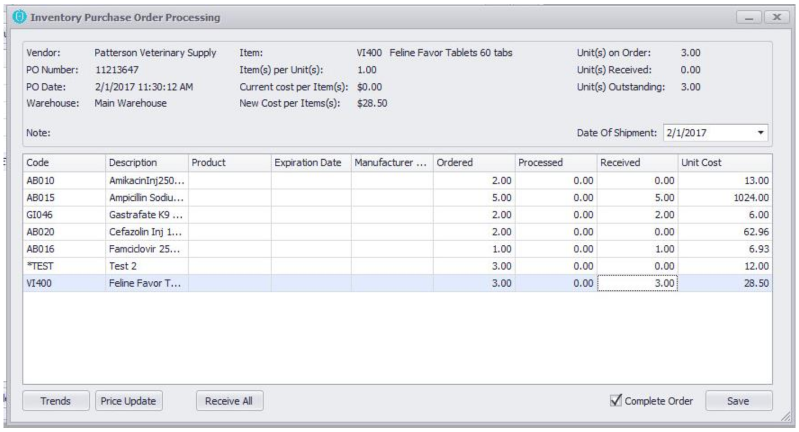
Receiving Your eShelf Order

- Once you have received your order from eShelf, go to Inventory | Purchase Orders.

- Right-select the Purchase order and Process.

- Enter the amount received and you also have the option to change the Unit Cost.

- If order is complete, check the box to Complete Order and click Save.



- This will remove it from the purchase order list since it is now completed.

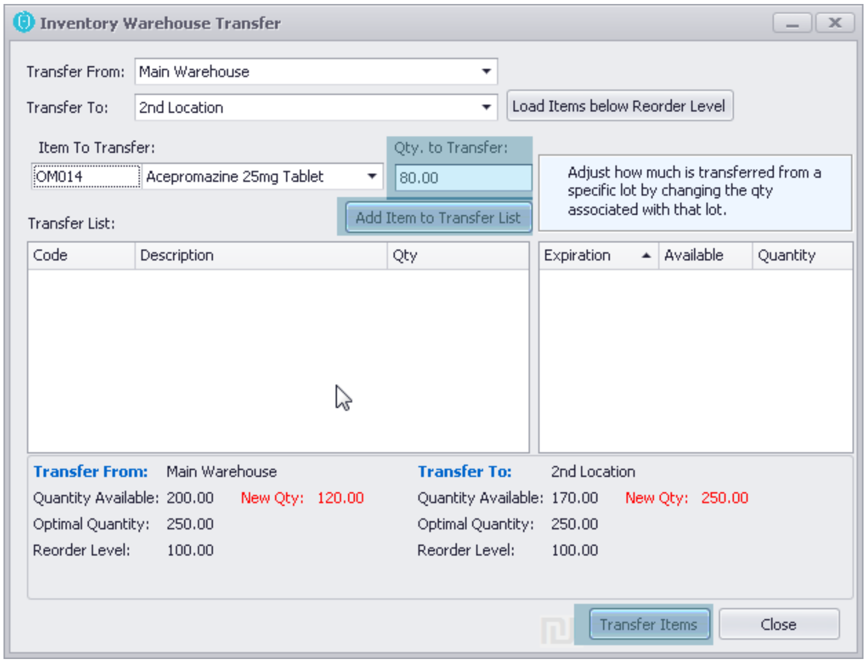
Inventory Warehouse Transfers

If you have more than one warehouse set up, use this utility to move inventory between warehouse locations. There is a transfer report available to view previous transfers, if needed.

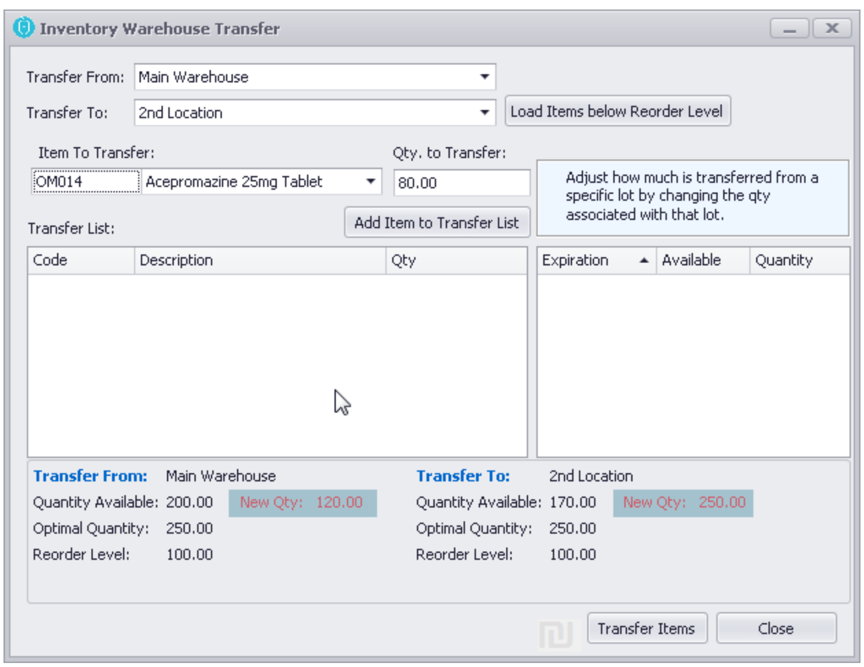
How to Transfer Inventory to Another Warehouse

- From the IntraVet Menu Bar, select Inventory | Inventory Warehouse Transfers.

- Enter the Warehouse you want to Transfer From.
- Enter the Warehouse you want to Transfer To.
- Double-click in the Item to Transfer field, or type the code or description in the field for the item(s) you wish to transfer.
- Double-click or press Enter on the keyboard to confirm your selection.
- Enter the quantity to be transferred. The number on the Transfer From side will decrease by the amount to be transferred on the Transfer To side.



- Click the Add Item to Transfer List button to add.
- There is also an option to Load Items below Reorder Level.
- When you have finished adding the items to be transferred, click Save.
- The new on-hand quantities are shown in red for both warehouses below as each line item in the grid is highlighted. The expiration dates (if applicable) are shown for reference on the right.



- Click Transfer Items.

Inventory Barcode

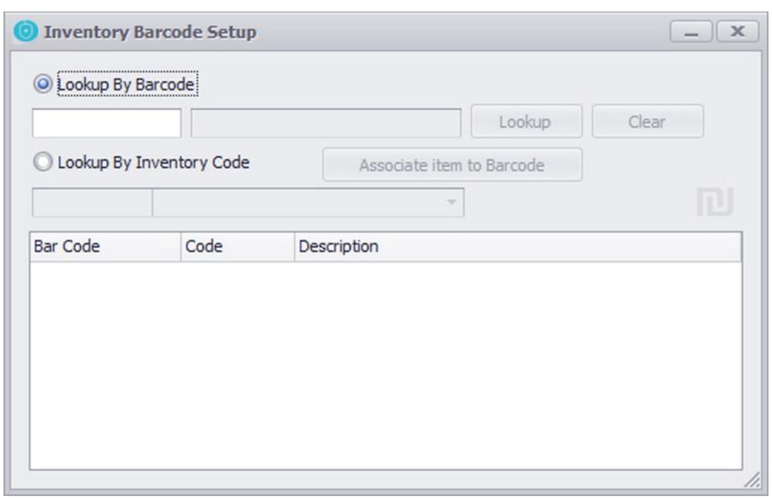
If you have a bar code scanner, you can associate codes to barcodes which can then be used during inventory processing and invoicing.

- From the IntraVet Menu Bar, select Inventory | Inventory Barcode.

- Click the Lookup By Barcode radio button.
- Enter the SKU number located under the barcode.
- Click Lookup.

You can also search by Inventory Code:

- Click the Lookup By Inventory Code radio button.
- Enter the code and description.
- Click the Associate item to Barcode button.



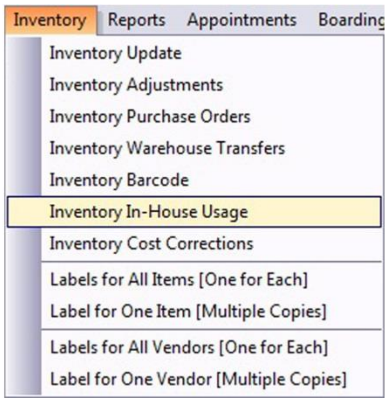
Inventory In-House Use

This allows for items such as cotton balls, syringes, things used during surgery that you don't necessary want to charge the client for but track the Inventory on Hand. Unlike an inventory adjustment, multiple items can be depleted at one time noting why the item was depleted. You can create templates for weekly/monthly depletions for those items that are depleted on a regular basis. Once a template is loaded, additions or adjustments can always be made. In-house use adjustments show as a separate type of depletion in your reports so that you can accurately track your in-house use.

How to Deplete Inventory for In-House Usage

Deplete using a template:

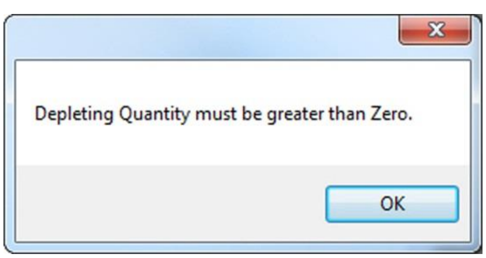
- From the IntraVet Menu Bar, select Inventory | Inventory In-House Usage.



- Select the appropriate Warehouse if you have more than one.
- Click Load Template to choose a previously saved template, if desired.
- If you have loaded an incorrect template, click Cancel.
- Click the down-arrow, scroll and select or type the first few letters of the code/description into the blank entry line in the lower portion of the window, and select the item.
- If you have selected an incorrect item, click Clear Line. Repeat the step above.
- Use the blank field to the right to add notes; enter the amount in the Quantity field at the far right. Click Done or press Enter to move the item into the grid.

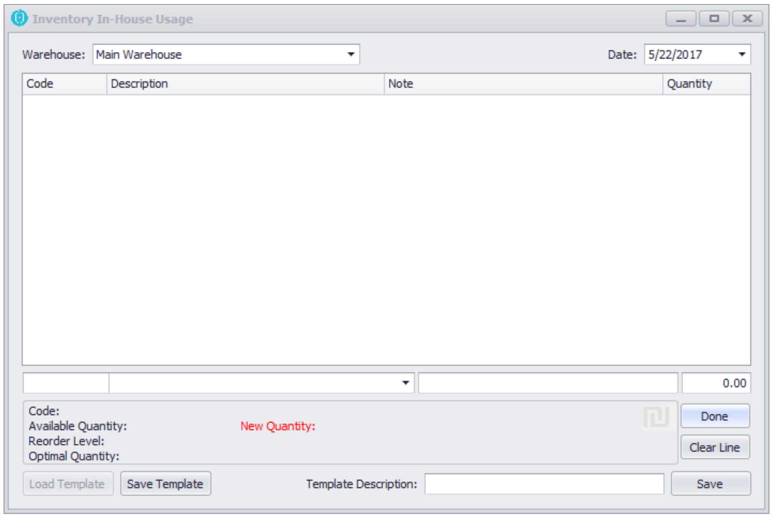
  If your mouse has a scroll wheel, roll it up or down while the mouse cursor is inside the Quantity field to increase or decrease the number.
- If the incorrect quantity was typed in, right-click and select Edit or double-select the line in the grid to reopen.
- Click Done to accept the change.

  If you did not enter a quantity, the following message will appear.



- To add other items, repeat the steps above.
- Right-click on any line item to edit or delete it. You can also jump to the top or bottom of your inventory list.

- If you would like to save the entries as a template to load and deplete again, give the template a name in the Template Description field and click Save Template.
- Click Save to deplete and record the depletions as in-house usage in all inventory reports.



Deplete in-house inventory without a template:

- Select the appropriate Warehouse if you have more than one.
- Click the down-arrow, scroll and select or type the first few letters of the code/description into the blank entry line in the lower portion of the window, and select the item.
- If you have selected an incorrect item, click Clear Line. Repeat the step above.
- Use the blank field to the right to add notes; enter the amount in the Quantity field at the far right. Click Done or press Enter to move the item into the grid.

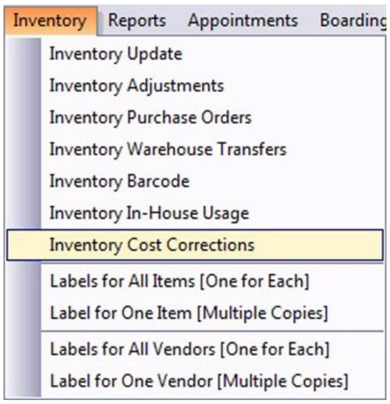
  If your mouse has a scroll wheel, roll it up or down while the mouse cursor is inside the Quantity field to increase or decrease the number.
- If the incorrect quantity was typed in, right-click and select Edit or double-click on the line in the grid to reopen.
- Click Done to accept the change.
- To add other items, repeat the steps above.
- Right-click on any line item to edit or delete it. You can also jump to the top or bottom of your inventory list.
- Click Save to deplete and record the depletions as in-house usage in all inventory reports.

Inventory Cost Corrections

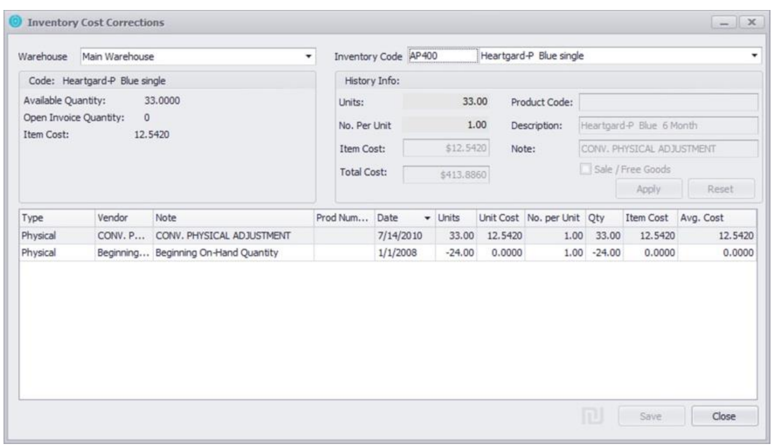
If your cost or quantity on-hand is incorrect, it may be because of a typo or mistake in a past inventory transaction (receive, return). You can locate and edit past transactions when necessary in Inventory Cost Corrections. When you make a change, IntraVet recalculates the average cost and quantity on-hand accordingly so that all reports that look at costs in previous periods are updated.

How to Make an Inventory Correction

- From the IntraVet Menu Bar, select Inventory | Inventory Cost Corrections.

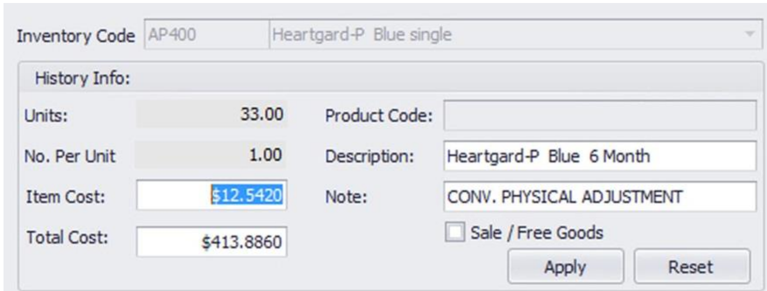


- Enter the Warehouse (if you have more than one).
- Click the down-arrow and double-click on, or type the first few letters of an item name in the blank entry line in the upper portion of the window to locate the item; double-click to place the item in the entry line and the grid below.
- Click Enter. The past transactions for your code/warehouse appear in the grid.

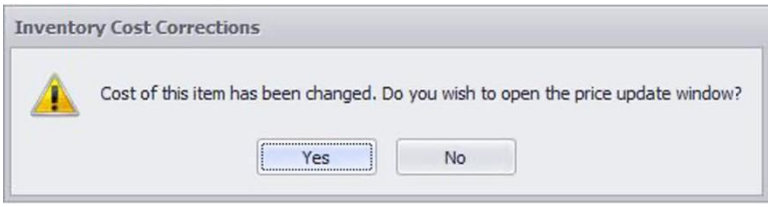


- Double-click on the line item to populate the blank fields in the upper portion of the window.
- The Description or Note can be changed. You can check the Sale/Free Goods box.
- Click Apply (or press Enter on your keyboard) when all changes to the entry have been made – or click Reset to cancel and choose a different code.

After you change information on an entry, the quantity on-hand and average cost for that item is recalculated.



- IntraVet asks you to confirm that you want to update this item.

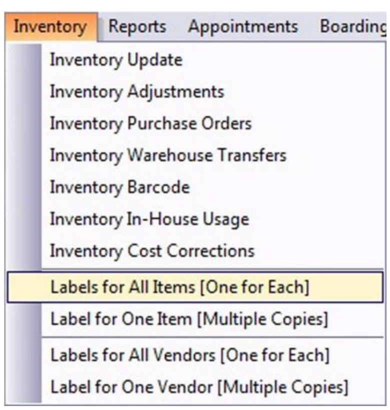


- If you choose Yes, this makes the necessary changes in the Inventory Price Update window.
- Click No to return to the Inventory Corrections window.
- Click Save to save changes when you are finished making corrections to your inventory.

Labels

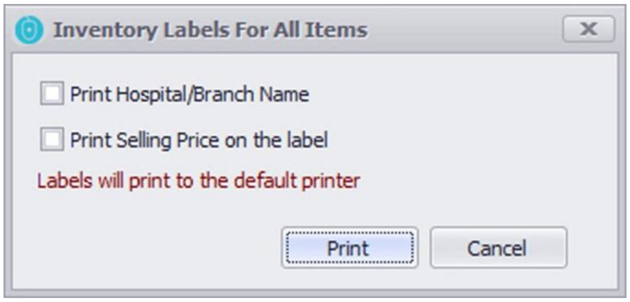
Print Labels for All Items [One for Each]

- From the IntraVet Menu Bar, select Inventory | Labels for All Items [One for Each]



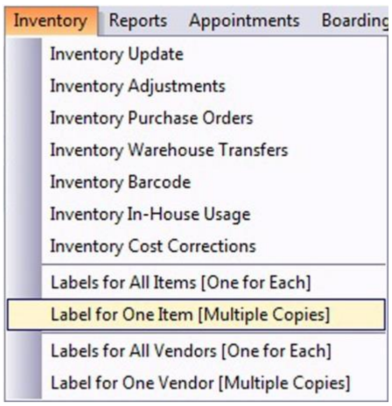
- Check the appropriate box:
  - Print Hospital/Branch Name
  - Print Selling Price on the label
- Click Print.

Labels will print to the default printer.

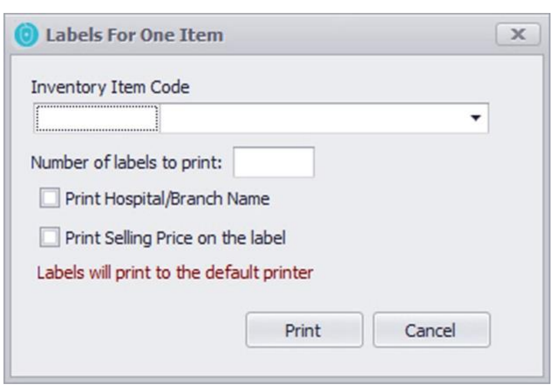


Print Label for One Item [Multiple Copies]

- **From the IntraVet Menu Bar, select Inventory | Label for One Item [Multiple Copies].**



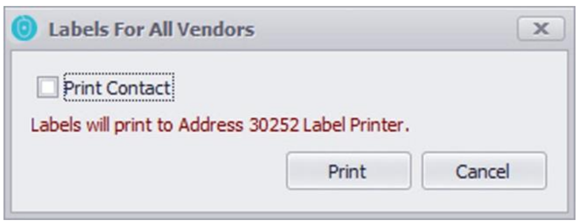
- **Click the down-arrow, scroll and select or type the first few letters of the code/description into the blank entry line in the lower portion of the window, and select the item.**
- **Enter the number of labels to print.**
- **Check the appropriate box:**
    - **Print Hospital/Branch Name**
    - **Print Selling Price on the label**
- **Click Print.**



Print Labels for All Vendors [One for Each]

- **From the IntraVet Menu Bar, select Inventory | Labels for All Vendors [One for Each].**

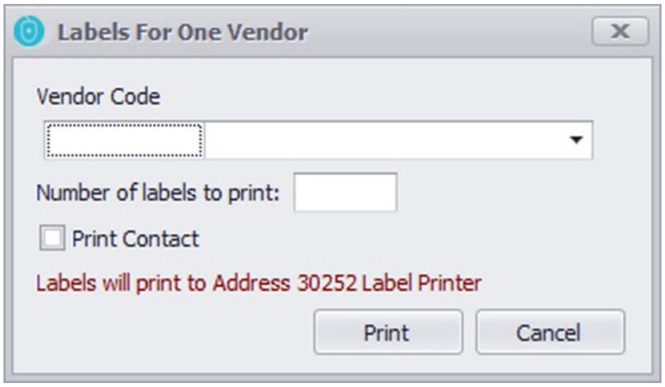
- If you would like the Contact printed, check Print Contact.
- Click Print.



Print Label for One Vendor [Multiple Copies]

- From the IntraVet Menu Bar, select Inventory | Label for One Vendor [Multiple Copies].

- Click the down-arrow, scroll and select or type the first few letters of the code/description into the blank entry line in the lower portion of the window, and select the item.
- Enter the number of labels to print.
- If you would like the Contact printed, check Print Contact.
- Click Print.


Labels For One Vendor
Vendor Code
Number of labels to print:
Print Contact
Labels will print to Address 30252 Label Printer
Print
Cancel

Control Center

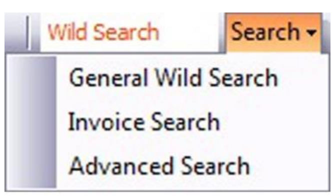
Wild Search and Advanced Search

Many of the workflow and tracking features will require you to locate a client or patient. There will be times when you need to search by breed, species, or invoice, for example. This type of search is quickly handled by Wild Search and Advanced Search.

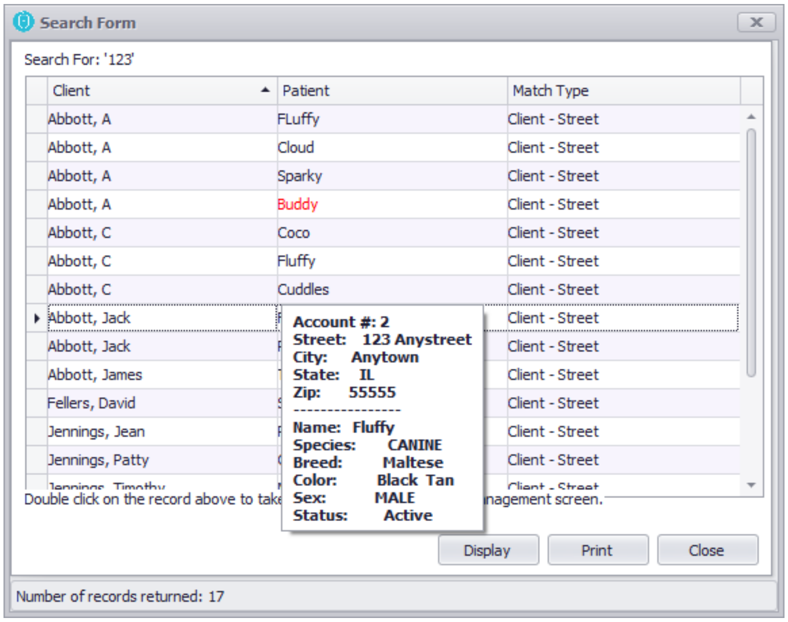
General Wild Search

Use Wild Search on the IntraVet Toolbar for specific client or patient information searches.

- Click in the Wild Search field. Enter a tag ID, phone number, email address, street name or the first few letters of a client name.
- Press Enter or click Search and select General Wild Search.



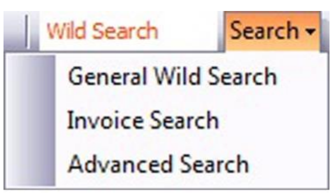
- A list of possible matches appears. It displays the client name with the patient name, and type of match. For example, if you type “5678,” you may get a matching Tag ID for a patient and a matching street number for a client’s address.
- The number of matches displays at the bottom of the window.
- As you hover or roll your mouse over each client or patient in the list, additional client/patient information pops up.



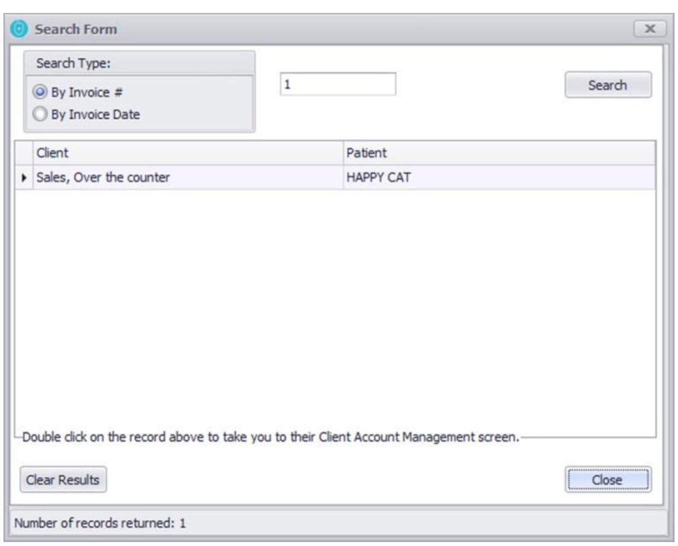
- Double-click a client to open the Client Account window. Your result window remains open in case you need to refer back to it.
- To print the search results, click Print.

Invoice Search

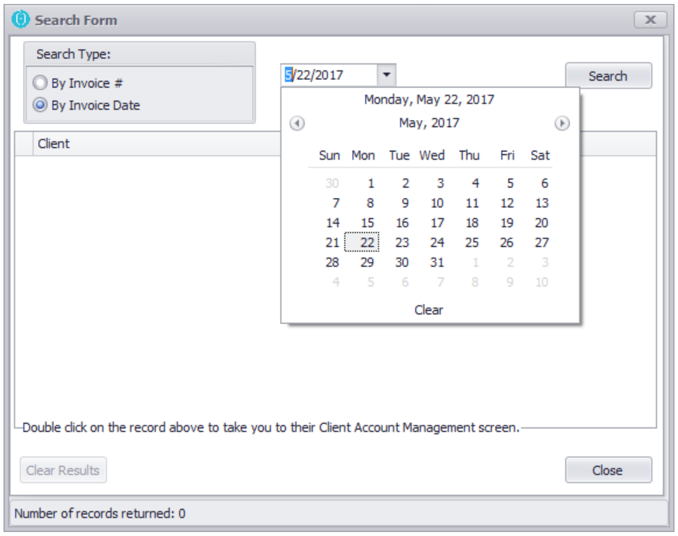
- Select Search in the top right of the IntraVet Toolbar and select Invoice Search.



- A window opens where you can enter an invoice number.



Search by
Invoice Number



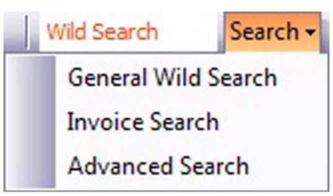
Search by
Invoice Date

- Enter a date or select a date from the pull-down calendar.
- Click Search.
- Double-click on a client to open the Client Account window.

Advanced Search

Sometimes you need to use multiple criteria to find an account, e.g., a chocolate lab named Bear or a sable ferret that was brought into the practice within the last month. This search can also be done quickly from the Advanced Search link on the IntraVet main screen Toolbar.

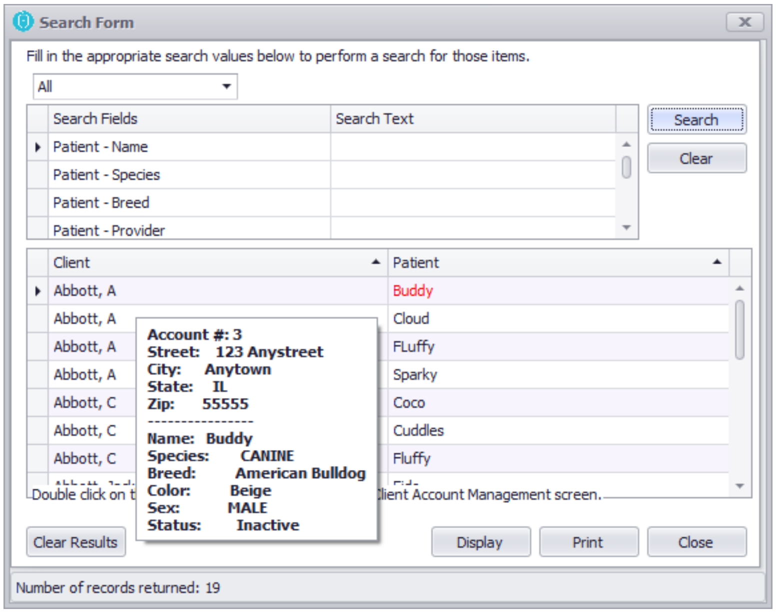
- Click Search in the top right of the IntraVet Toolbar and select Advanced Search.



- Enter as many criteria as desired to narrow your search. You can enter patient and client parameters as well as last visit date.
- Click to the right of the criteria to enter the search information.
- Click Search to begin the search.

A list of matching clients/patients appears. Hover or roll your mouse pointer over an item; additional information pops up.

- Double-click on a client to open the Client Account window. Your result window remains open in case you need to refer back to it.



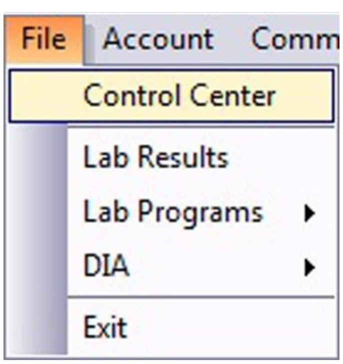
Control Center – Main

Control Center Setup & Customization

The Control Center, also known as the white board, is the hub of communication in IntraVet. It allows you to get to many different places within the software from one central location. It provides an overview of what is going on in the practice for that day.

The top of the screen has three different tabs that switch from different places within the Control Center. This simplifies access to other areas of the software. When you enter the Control Center it always defaults to the Control Center tab.

- **Select the Control Center icon in the IntraVet Toolbar to open the Control Center or select File | Control Center.**



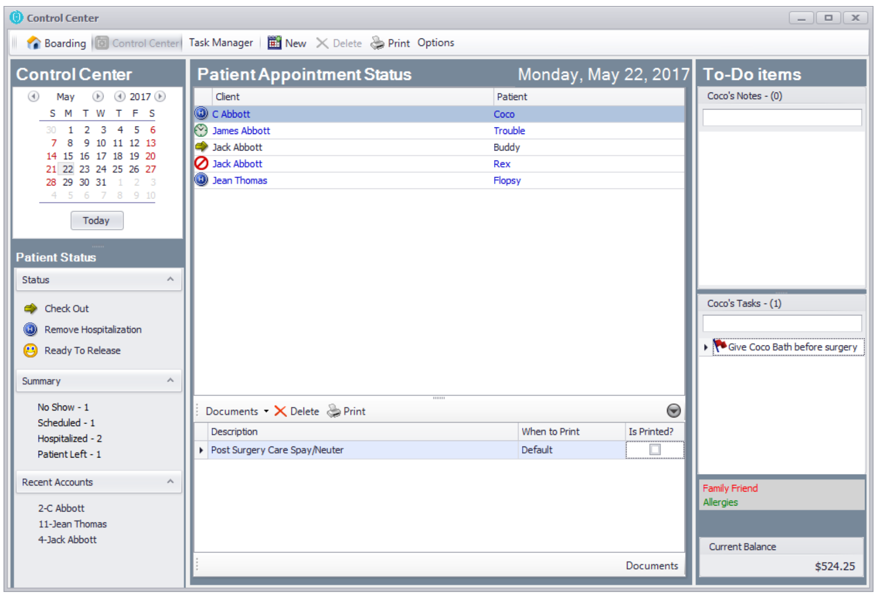
The screen will open to the main Control Center tab.

To adjust the length of a section, hold the mouse button down on the four dots between and pull the bar up or push it down to obtain more viewing space in the column. For example, to see more of the Patient Status options, pull its bar over the top of the calendar.

An entry is made in the Control Center for each patient that has activity for the day: usually an appointment, treatment in hospital or a drop-off.

The main sections of the Control Center include:

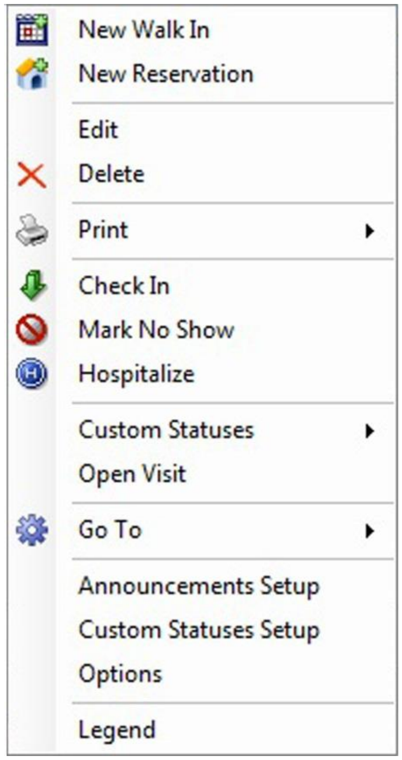
- Visit line entries for each patient/client
- Status bar/changes
- Summary of daily activity
- Notes for each visit
- Tasks for each visit
- Documents for each visit
- Current Balance



Control Center Settings

You can customize your Control Center by defining several settings. The Control Center options can be set up to reflect what the user of that computer would like to see. Example: If your computer in your groom room only needs to see what pets are coming in for Grooming, they can set up the options to only reflect the Grooming appointments.

- With Control Center open, right-click in the central portion of the white pane and select Options.

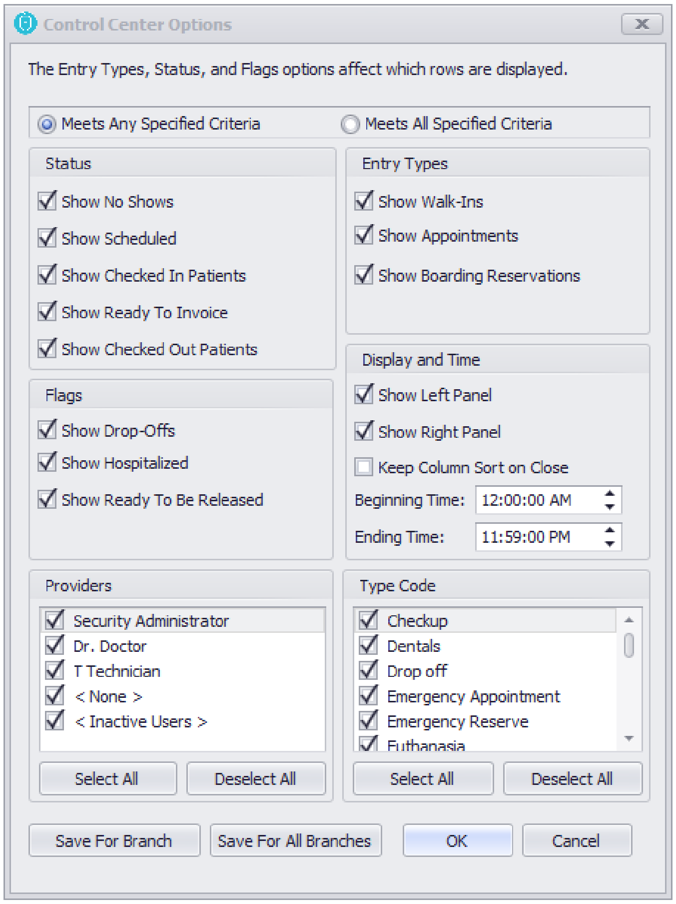


- A window opens to the Control Center Options.

  The Entry Types, Status and Flags options affect which rows are displayed.
- Select or deselect options to define how you want Control Center to appear.
  - If meets ALL specified criteria is selected, the patient appointment has to match exactly all options that are selected.
  - If meets ANY specified criteria is selected, regardless of what options are selected the patient appointment should appear on the Control Center.
- There are two Save options. Save for Branch saves the options you selected as defaults for just that branch. If you have other facilities and you want them to have the same setup, click Save for All Branches.

  To apply the selected options for that patient and that particular viewing, click OK. Once the Medical History screen is closed and re-opened, the default options will re-apply themselves.

  *If you open your Control Center and you do not see a patient on there that should be, you will want to look at the Control Center options you have selected. If you can't get the appointment to show on your Control Center, try checking all boxes including the Select All boxes at the bottom of the Options screen, as well as meets ANY specified criteria and click OK.



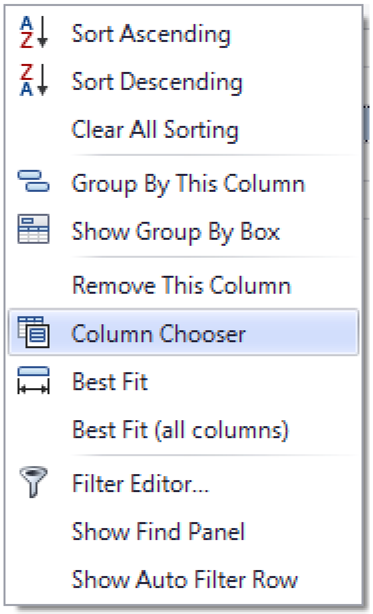
Changing the Columns on the Control Center

The columns displayed by default are Patient and Client. You can drag and drop the column headers to change the order that this information appears, or you can remove or add other columns of information.

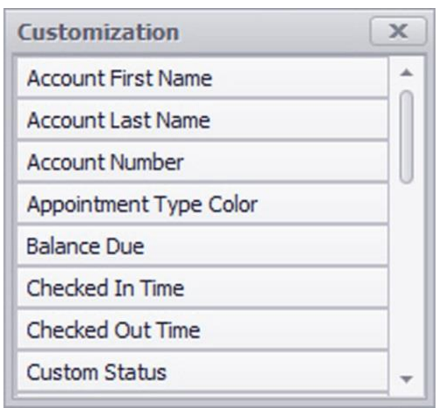
Control Center Column Chooser

To change the information that appears for each visit line entry:

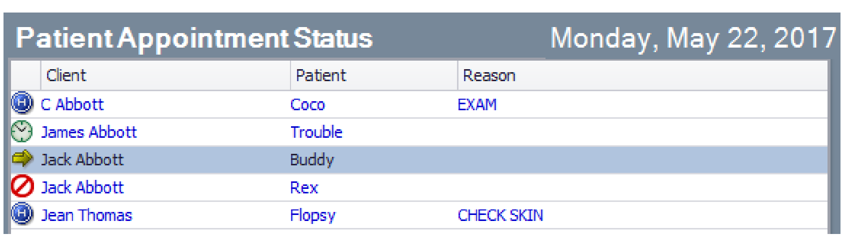
- **Right-click in the column heading area and select Column Chooser.**



- The Column Chooser box appears. Scroll through to see the available selections.

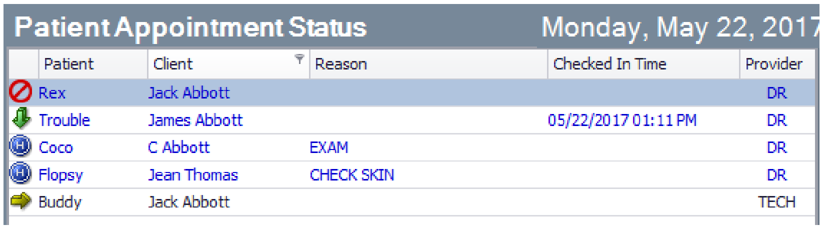


- To add a column to the display, select and drag the column title to the column headings and drop it there. You may need to right-click on the column heading area and choose Best Fit to see your new column.



- To remove an existing column, drag the column heading back down to the Column Chooser box and release it.
- You can re-arrange the columns you have placed by dragging and dropping them into the positions you prefer. You can also adjust the width of each column.

In the example image below of a modified Control Center, columns are removed, added and re-arranged.

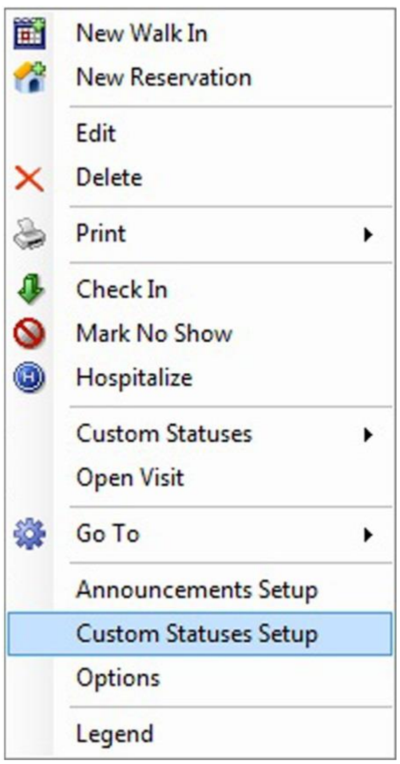


Custom Column/Status

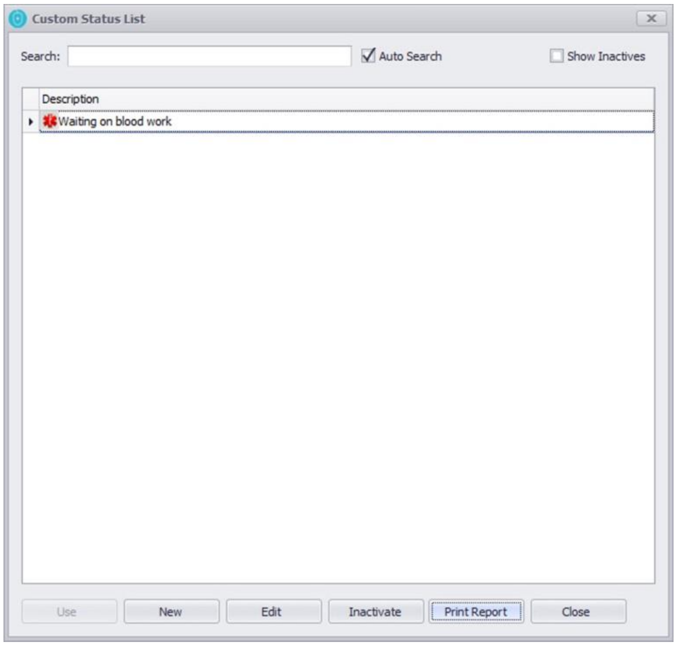
If there is something that you want to track about a visit that cannot be done through adding other columns, you may want to create a custom status set. You can designate a column for this and then define as many different statuses for it as needed, each with its own custom icon.

To add a custom column/status set:

- First, add the Custom Status column to the Control Center with the Column Chooser. (Refer to the previous instructions for Column Chooser.)
- Right-click in the Control Center main window and choose Custom Statuses Setup.

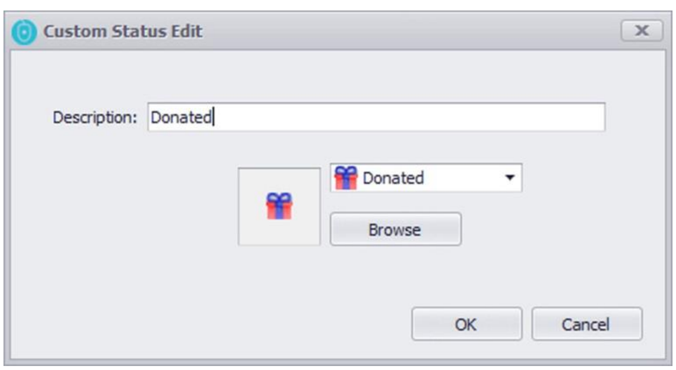


- The Custom Status List screen will appear.
- Click New to create a new custom status.

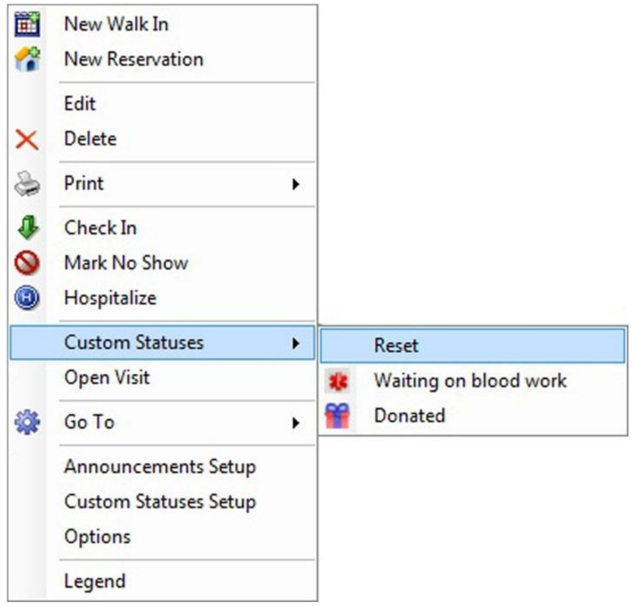


- Add a Description.
- Click the down-arrow to select a pre-defined default icon, or
- Click Browse to locate an icon of your own design or preference.

  Image files must be 16x16 pixels and saved as either a *.bmp* or *.icon* file type.
- Click OK.
- Click Close.



- Add more statuses and associated icons.
- To change a Custom Status on a visit, right-click on it and go to Custom Statuses and select the corresponding icon/description.
- To remove a Custom Status from the visit line, right-click on it and select Custom Statuses | Reset.

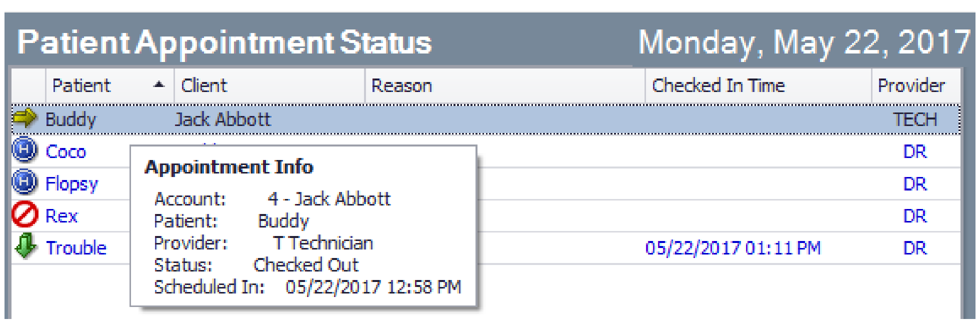


Viewing and Sorting the Patient Appointment Status

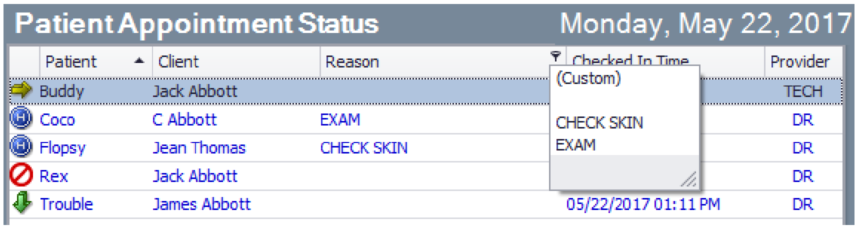
The Control Center defaults to Patient order, but you can select the heading of any column to sort it by that column. If you click a column heading the sort changes to descending or ascending order.

Regardless of the sort order, the entry that is scheduled closest to the current time is highlighted as a reference point.

As you hover the mouse pointer over each entry, additional information about the client, patient and appointment appears in a Tooltip box.



- Each column in the Control Center can be filtered. For instance, to see only entries with the Reason of Limping, hover your mouse pointer over the Reason column header and select the filter button in the upper right corner (looks like a push pin).
- Then, select a choice (Limping) from the list. Entries not matching the selected filter will disappear from view.
- Select the filter button again and select All so that all entries/types display. You can also close out of and then reopen the Control Center to view all entries again.



Patient Status

Patient Status includes two subsections: Status and Summary.

A patient's current status is tracked from the time the appointment is scheduled until the patient is checked out and an invoice is generated using a 5-icon system.

The center pane shows an icon tagged to each patient:

- No-Show
- Scheduled
- Check Patient In
- Hospitalized
- Ready to Invoice
- Ready to Release
- Check Patient Out

The patient's status determines which of the icons will appear in the Status pane in the left column.

Summary

The Summary section of the Control Center provides a quick count of the number of patients in each of the following categories for the current day:

- No Show – A patient's status becomes No Show a certain amount of time past the scheduled appointment time (you set this interval) or can also be marked as such manually.
- Scheduled – Treatment planned for the day, check-in has not occurred yet.
- Checked In – The patient has arrived.
- Hospitalized – Treatment is still in progress.
- Ready to Invoice – The medical staff has finished treatment and the charges can be processed. Displays only if the Ready to Invoice button is turned on in Setup/Visits/Visit Settings for your practice.
- Patient Left – Patient is checked out and charges have been saved and finalized.

Document List

Documents can be set up as part of a standard visit template under Setup | Visits | Visit Template. (see Visit Templates.)

You can select which documents you want to accompany each patient's medical records, such as a certificate or consent form.

You can add documents to the list or modify documents for individual visits. For example, you can print a current vaccination certificate with every annual canine visit or a consent form when you do a dental.

You can also designate when each document prints.

Assign Documents to a Visit

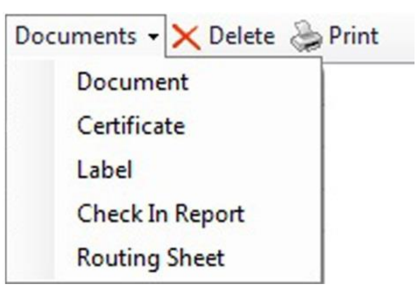
Documents that are important to the animal's care can be attached in the patient's Visit window and can be printed and provided to the client.

To Add a Document to the List

- To view/add documents to the list, highlight the client. Documents for this visit will appear under Documents.

  If documents have already been printed, there will be a checkmark in the column Is Printed? for that document. If they have been scheduled to print it will be designated under When to Print.

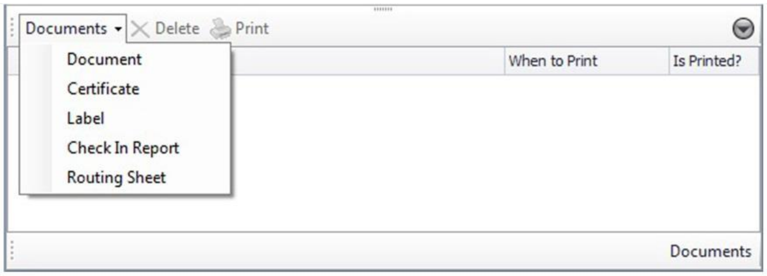
- To add additional documents, click the Documents down-arrow and select Document.



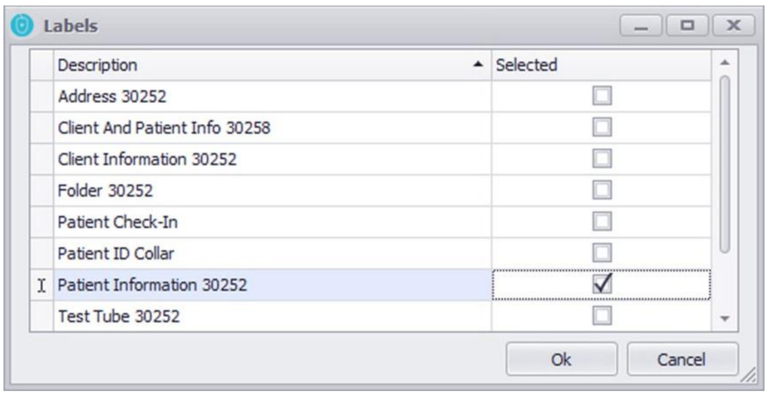
- Choose the type of document you want to add.

There are several document options:

- Document (handout or form you have customized through Document Code Setup or from LifeLearn)
- Certificate (Vaccination, Spay/Neuter, Health)
- Label (Patient, Client or Custom Label)
- Check-In Report (Brief History and Reminder print-out)
- Routing Sheet (travel sheet or circle sheet you have set up)



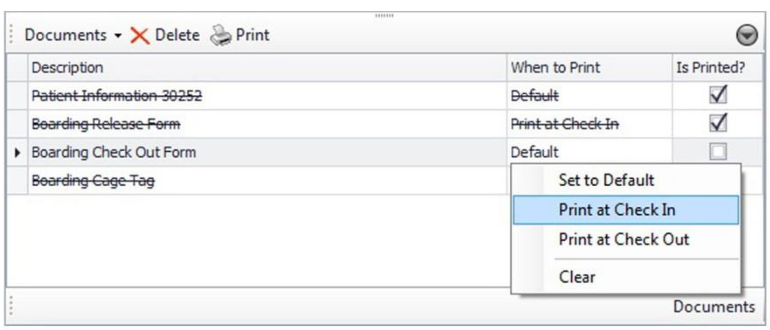
- Click the checkbox to select the specific document(s) (handouts, forms, label, etc.) from the list. Click OK.



To Set the Document Print Time

- Right-click the selected line under When to Print and select your choice.
- Select either Print at Check-In or Print at Check-Out. Clear will remove the document from the list.

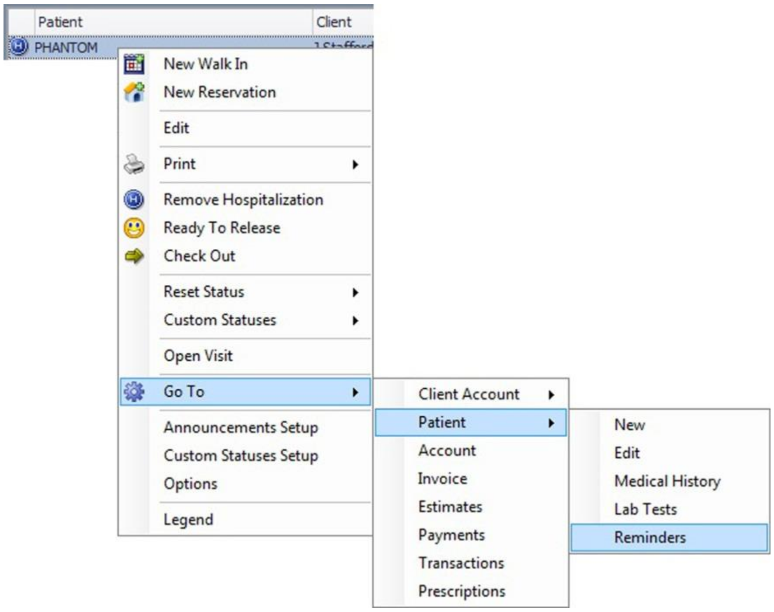
  Once the document has been printed a checkmark is placed in the Is Printed column.



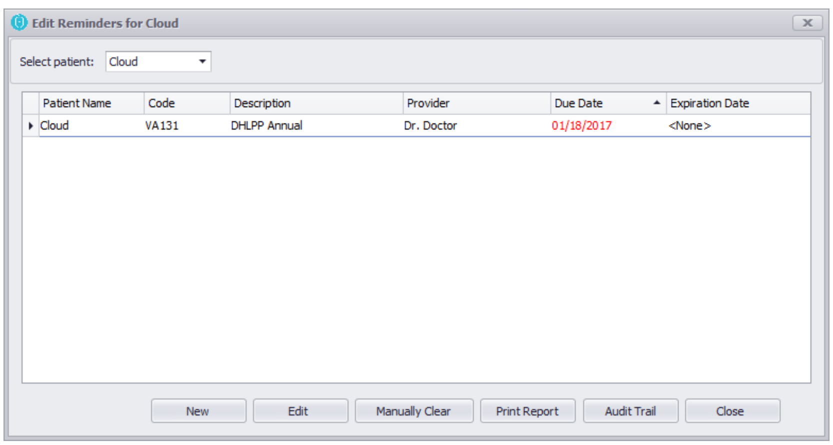
Print Reminder List from the Control Center

Reminders attached to a patient can be printed from the Control Center.

- Right-click client/patient line and select Go To | Patient | Reminders.



- Click Print Report.



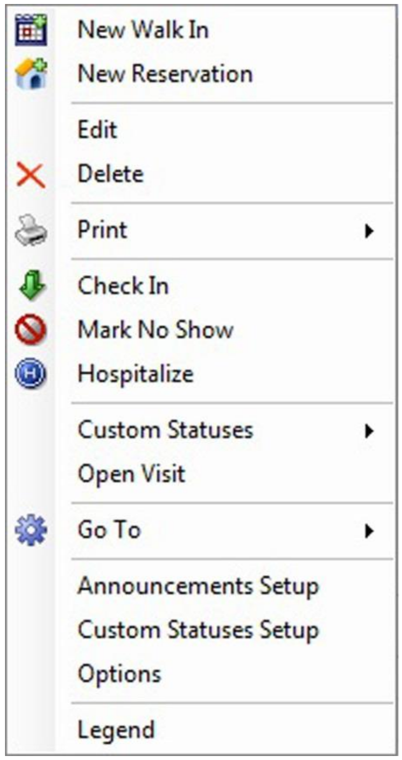
Changing the Patient's Visit Status

Patient status is controlled and displayed in both the center pane and the left panel of the Control Center.

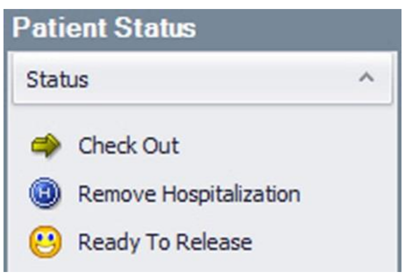
The center pane is where the patient visit displays.

To change the patient's visit status, right-click on the client/patient line and select a new status. Depending on your patient's new status, you have other options. Normally, the status changes as follows:

- The patient status starts out as Scheduled because most line items start as an appointment, drop-off or reservation made in advance.
- When the patient arrives, choose Check In to process the check-in, and change the patient's status at that time.
- Another way to get status options is to right-click on a patient line.



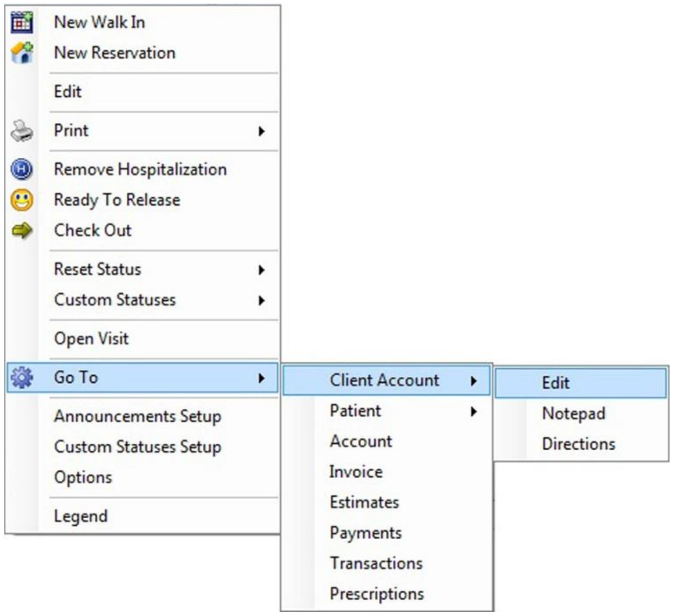
You can also change patient status from the left column. Highlight the client/patient line in the center pane and select the status in the left panel that you wish to assign to the patient.



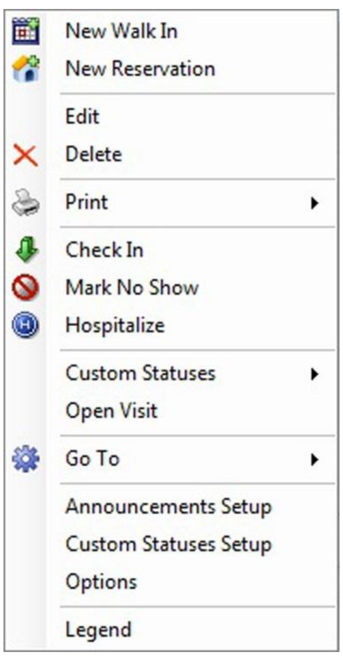
Process the Check-In – Scheduled Appointment

Client and patient information can be edited at the time of check-in.

- To edit the client, right-click on the client/patient line. Select the gear icon, Go To | Client Account | Edit.
- Make the necessary changes and click OK.



To make changes to the Appointment, right-click on the patient line and select Edit. The Client Appointment window opens.



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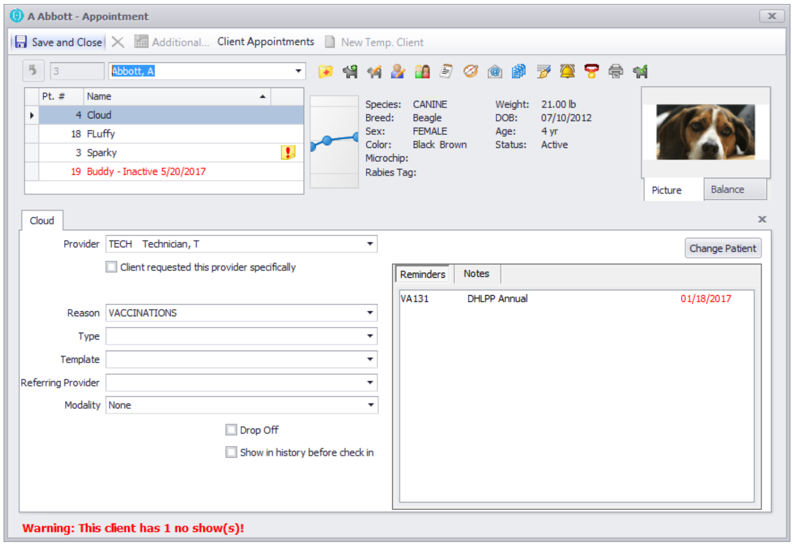
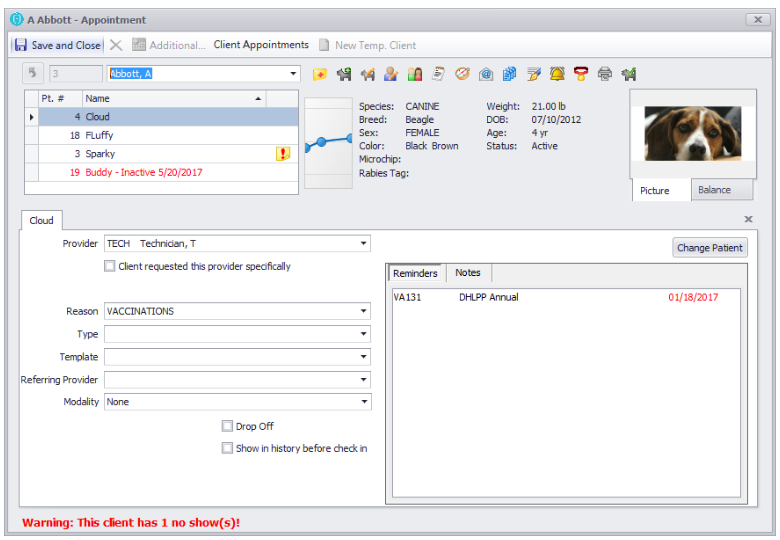
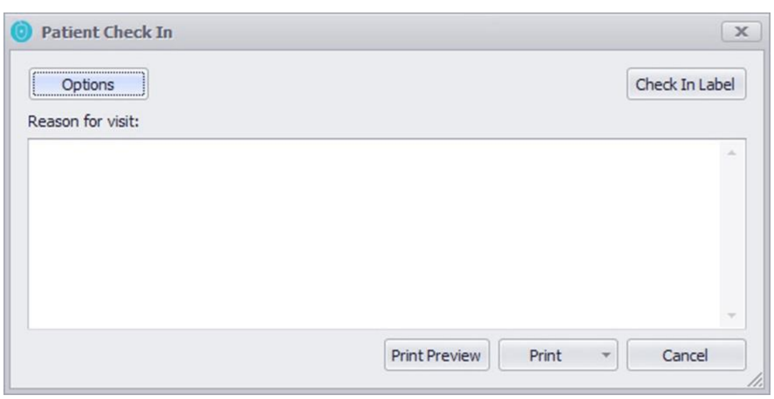


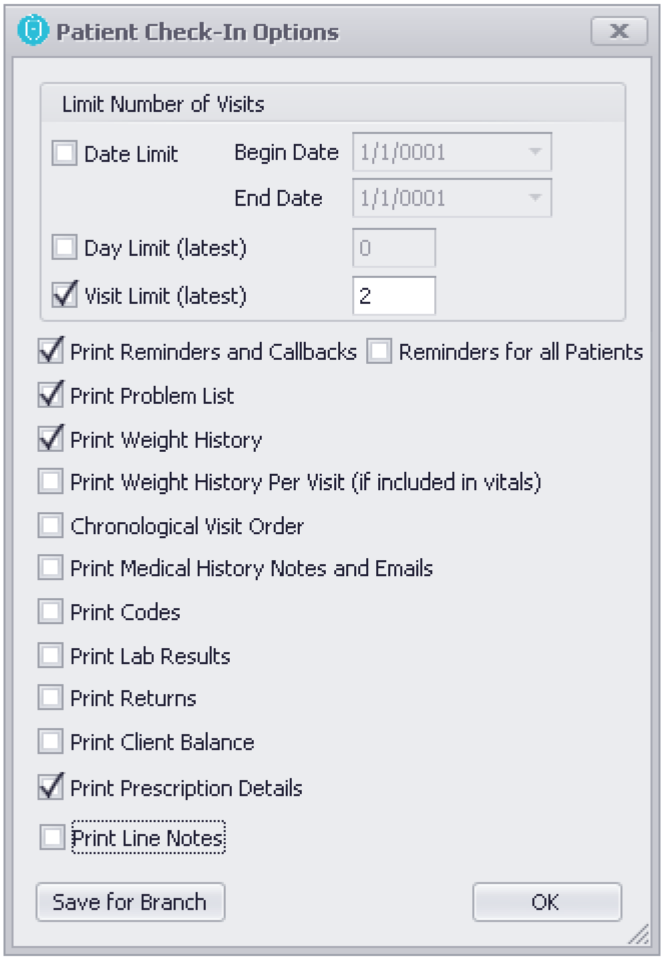
- **Select the Patient Check In icon to add additional visit information or to print a check-in report and/or label.**



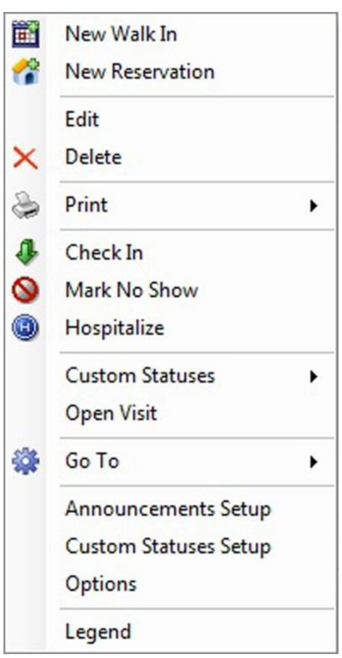
- **Select Options to set up printing options.**



- After the options have been selected, click **OK** to save the options for just this print, or click **Save for Branch** to set these options as the default for your branch.



- **Close Client Appointment window.**
- **Right-click the patient line to select the patient. Then select Check In or choose Check In from Patient Status/Status in the left column.**



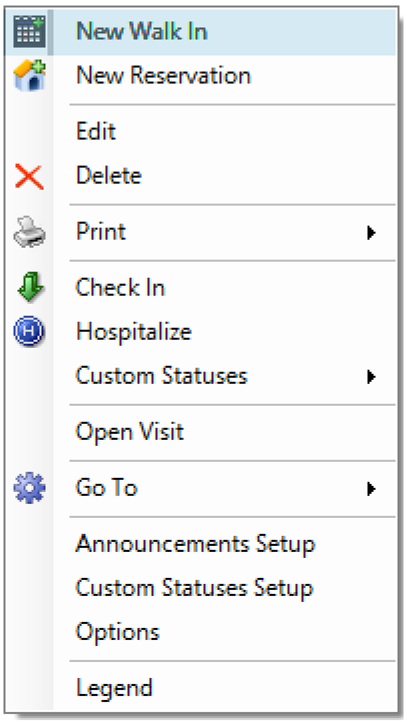
A patient who did not have an appointment but has some charges saved temporarily in an invoice automatically defaults to ready to invoice.

Process the Check-in – Walk-in Emergency

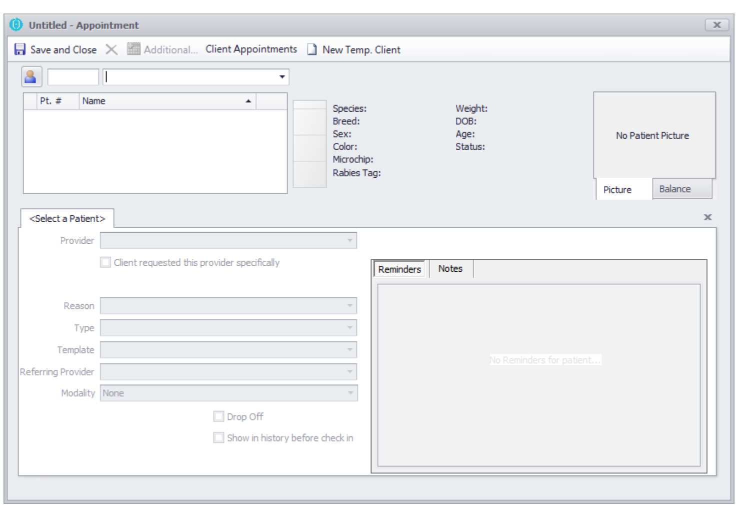
A walk-in can be processed directly through Control Center. Only a minimal amount of information needs to be gathered during check-in so that the patient can be seen immediately.

New Client and Patient

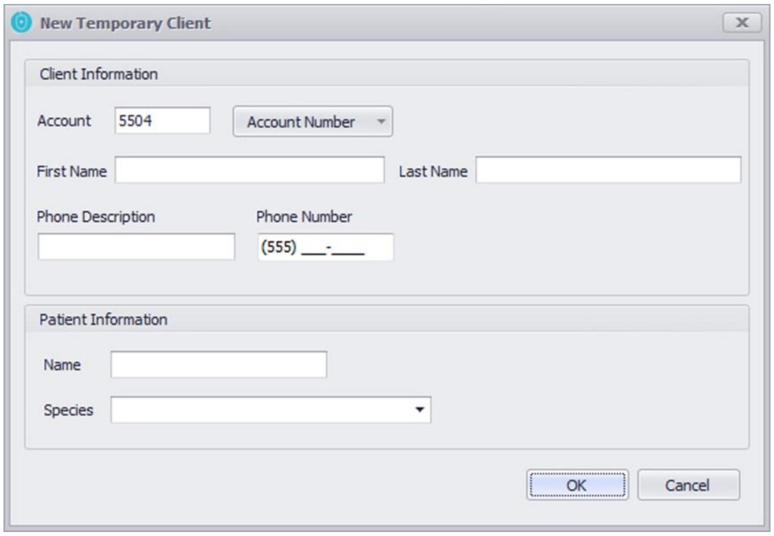
- Open the Control Center. Right-click anywhere in the Patient Appointment Status section (center) of the window.
- Select New Walk In.



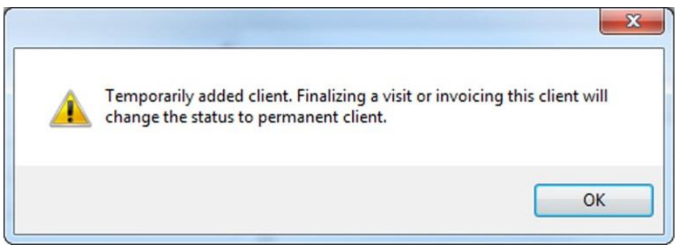
- An Untitled Appointment window will open. Click New Temp Client icon.



- Complete the information and click OK.



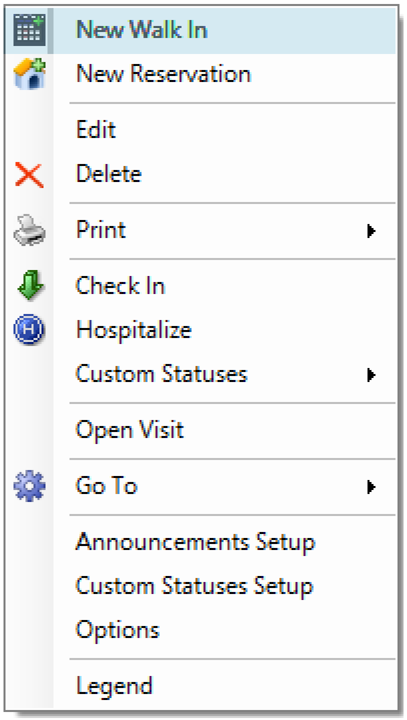
A message will pop up to alert you.



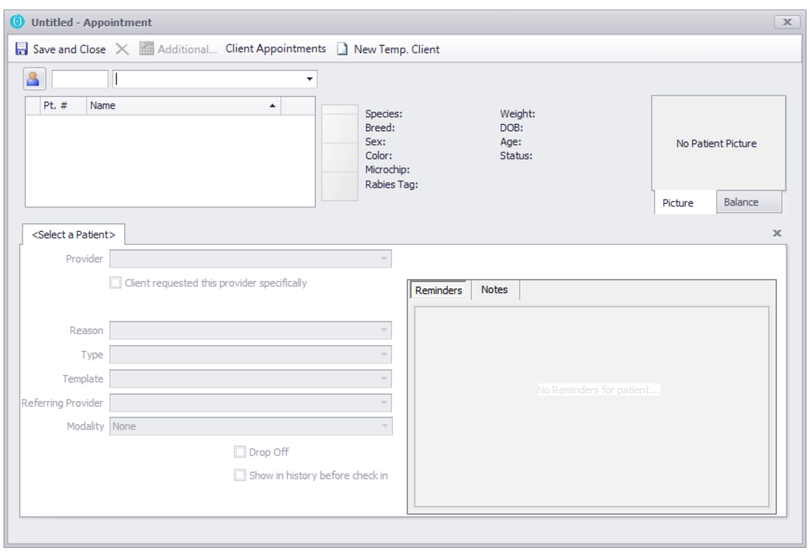
- Click OK.
- Select a Provider.
- Click Save and Close. The patient is ready to be seen.

Established Client and Patient

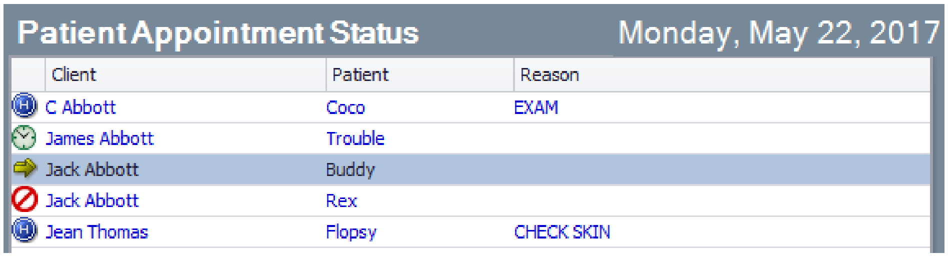
- Open the Control Center. Right-click anywhere in the Patient Appointment Status section (center) of the window.
- Select New Walk In.



- An Untitled Appointment window will open. Click Client icon.

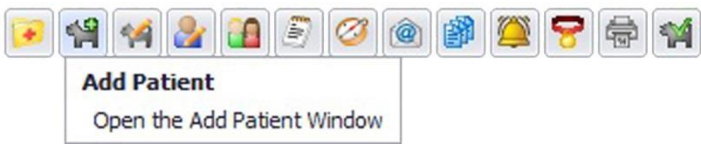


- Enter the first few letters of the client's last name in the Search field and click Enter. Scroll and double-click on the name in the grid to pull the client/patient information into the previous screen.
- The client may have more than one patient. To select, scroll and select the Patient.
- Select a Provider.
- Click Save and Close. The patient is ready to be seen.

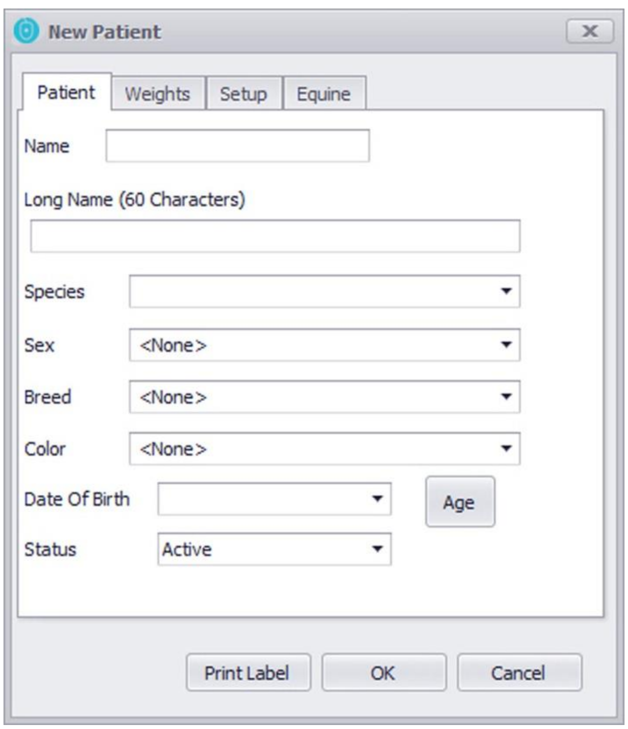


Established Client and New Patient

- **Follow the steps above in Established Client and Patient.**
- **Click the Add Patient icon.**



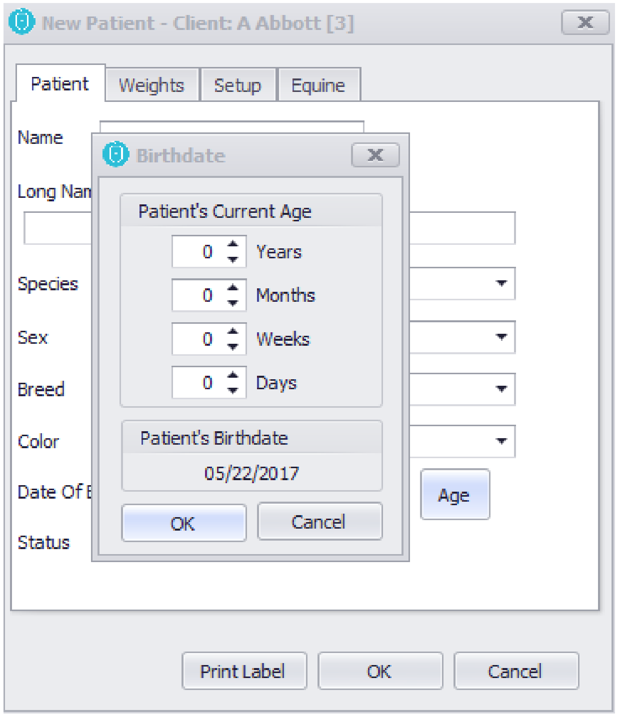
- **Complete the information and click OK. At a minimum, you must enter Name and Species.**



Other information can be entered while the patient is in the exam room or at time of invoicing. Follow the instructions above in the Process the Check-in for a Scheduled Appointment description.

If the age of the animal is unknown, such as a rescued animal, IntraVet provides an age/birth date calculator.

- **Click Age. This window allows the patient's age to be entered as Age as – Years/Months/Weeks/Days. Type a number(s) into any field(s); IntraVet automatically calculates the patient's birth date.**

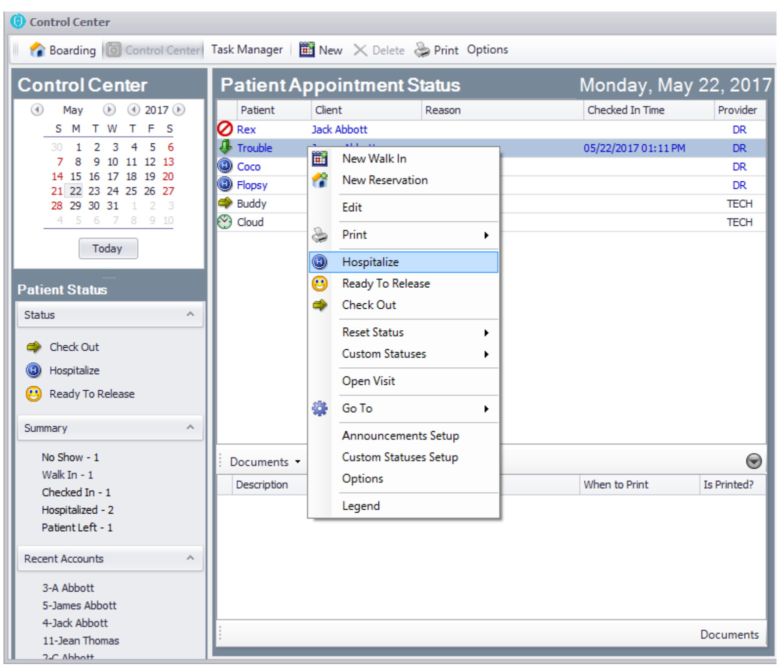


A walk-in emergency will be time-stamped with the current time when you begin the check-in process.

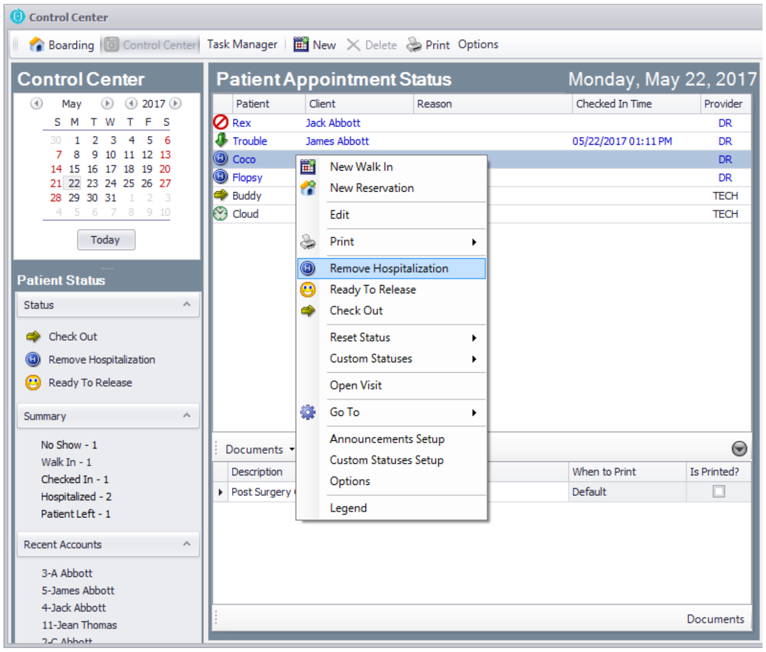
Hospitalization Services

If it is necessary to hospitalize the patient, you can change the patient's status to Hospitalize either directly from scheduled status or after check-in is complete.

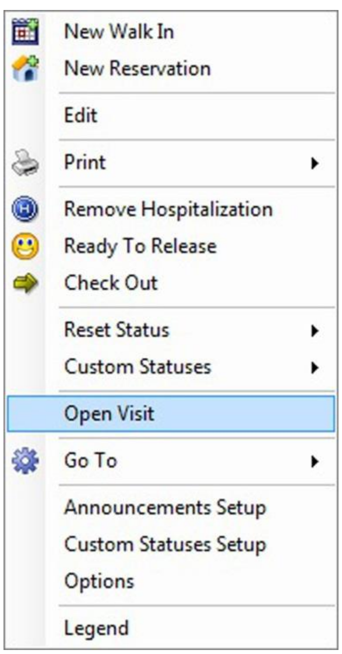
- To change a patient status to Hospitalized either right-click on the client/patient line and select Hospitalize, or select Hospitalize under the Patient Status/Status column.



- To change a patient status to Remove Hospitalization either right-click on the client/patient line and select Remove Hospitalization, or select Remove Hospitalization under the Patient Status/Status column.

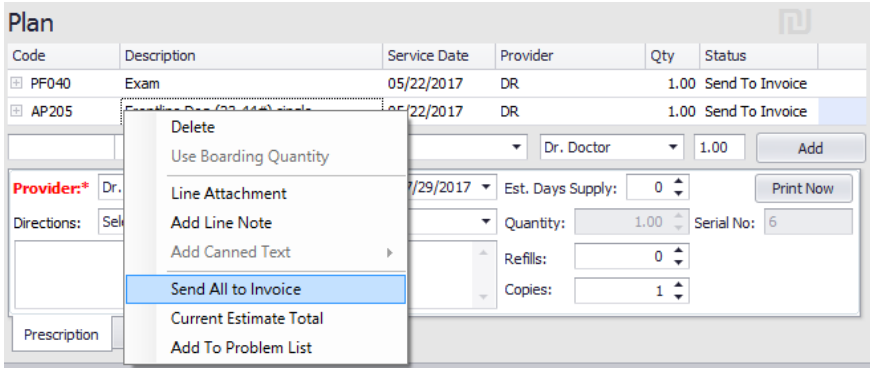


- Double-click on a Client/Patient line to open the Visit window if your Visit Settings are set up accordingly; otherwise, right-click on the client/patient line and select Open Visit.



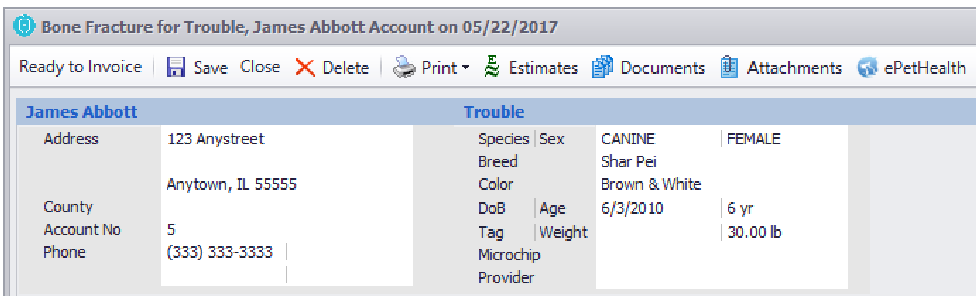
- If services are pre-loaded from the Visit template, right-click and choose Send All to Invoice to quickly confirm all charges.

- Vitals, Body System and other medical notes may be added or removed.



- Every service listed in the Plan must be changed to Send All to Invoice, Deferred, Rejected or Not Done). Options for default are available in Visit Settings under Setup/Visits.

  When the medical staff is done entering services and all services are properly tagged, the Ready to Invoice hot link activates. This indicates to the front staff that the client can be charged out. Ready to Invoice hot link activation is based on Visit Settings.

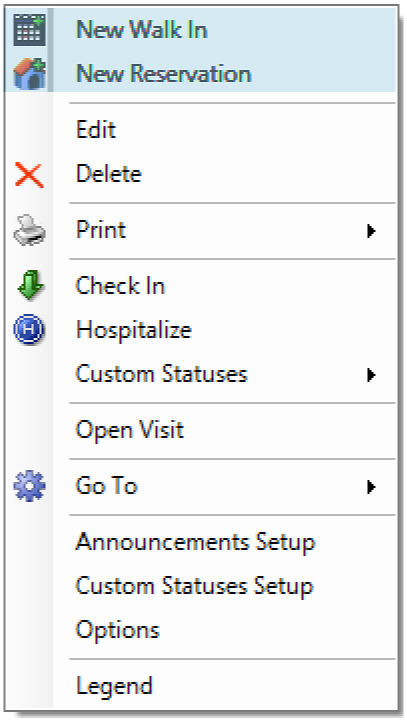


An Invoice can be accessed from the Visit window, from the Control Center or from the client's account. When the related invoice is permanently saved, the Control Center status automatically changes to Checked Out. Refer to the chapter Visits and Invoices for more details.

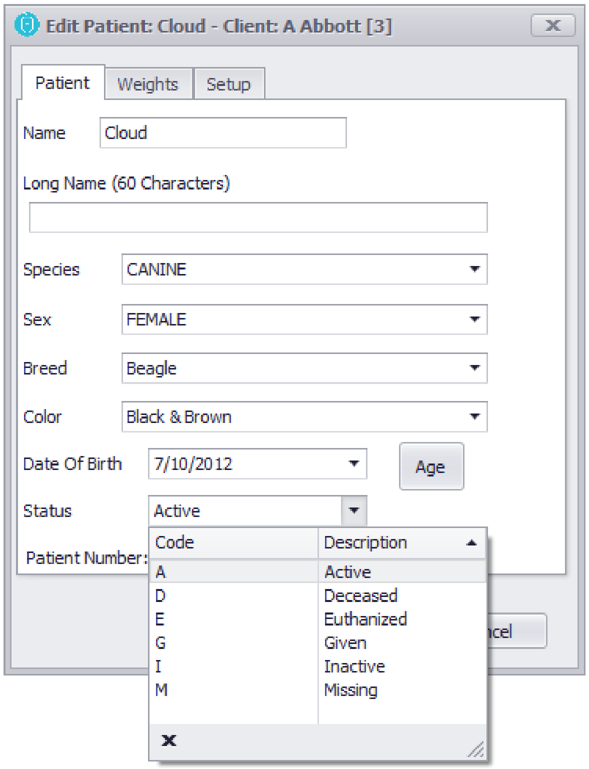
Reactivate a Patient

A patient can be reactivated at the time the appointment is scheduled or at check-in.

- Begin by opening the Control Center if it is not already open. Select the Control Center icon in the menu bar.
- Right-click on the Patient Appointment Status area.
- Select New Walk In or New Reservation.



- **The Untitled – Appointment window will open.**
- **Click the New Client icon. The Client List will appear.**
- **Select the Client. Click Use.**
- **Select the Patient. Click the Edit Patient icon .**
- **Change the Status to Active.**



Notes and Tasks

The right column of the Control Center contains notes, tasks, client/patient operator warnings and current balance.

Notes may also be entered to communicate with other staff members regarding the patient or client.

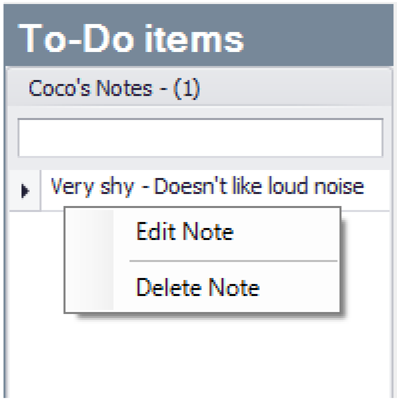
Tasks may be predefined related to the visit (visit template) or added as freeform at any time.

Client and patient operator warnings – They show in red and green font, respectively.

Current Balance shows the current balance of the highlighted client.

How to Enter a Note for a Client/Patient

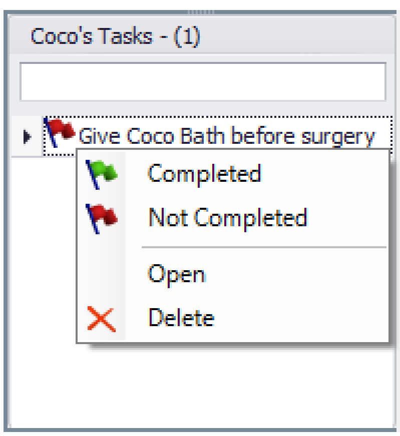
- Highlight the client/patient line. The selected patient's name appears at the top of the Notes and Tasks sections.
- Click in the blank note field and begin typing. Your typed message automatically word wraps. Press the Enter key on your keyboard to move that note to the pane and begin a new note entry.
- To Edit or Delete an existing note, right-click and make a selection.



How to Enter and Manage Tasks

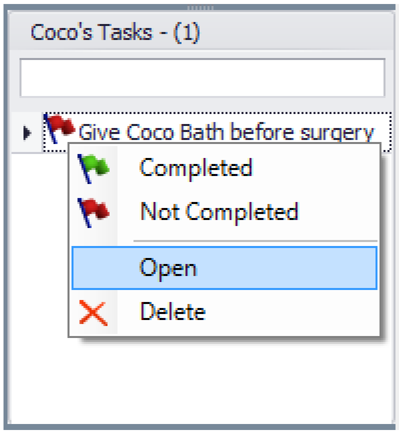
Tasks can be freeform and flexible like notes, or they may be part of a Visit Template and used to assign activities to certain staff members and mark off specific procedures or steps of the treatment as they are done.

- **Highlight the client/patient line. The selected patient's name appears at the top of the Notes and Tasks sections.**
- **Click in the blank task field and begin typing. Press the Enter key on your keyboard to move that task to the pane and begin a new task entry.**
- **To change to Completed, Not Completed, Open or Delete an existing task, right-click and make a selection.**

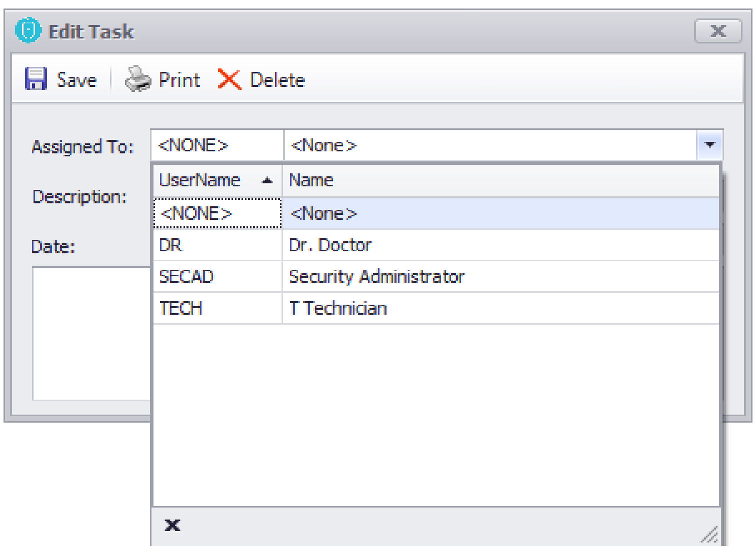


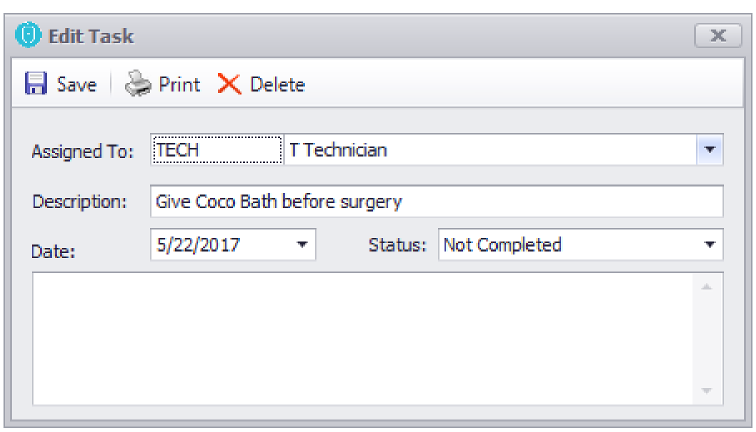
How to Assign and Track Tasks

- **Select the client/patient line to select.**
- **Right-click in the Tasks pane on the line and select Open.**



- In the Edit Task window, click the down-arrow next to Assigned To and assign someone to the task.
- Edit the Description if necessary.
- Select a due Date.
- Select a Status of Completed or Not Completed.
- Use the empty field at the bottom to add a comment regarding the task.





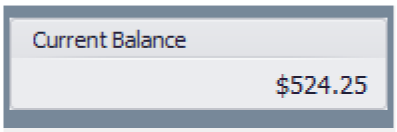
- Click Save.

Client and Patient Operator Warnings

Client and patient operator warnings show in red and green font, respectively.

Current Balance

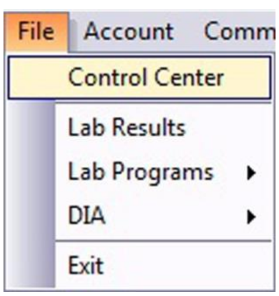
When a client/patient line is highlighted, the client's current, unpaid balance displays in the lower right panel under Current Balance.



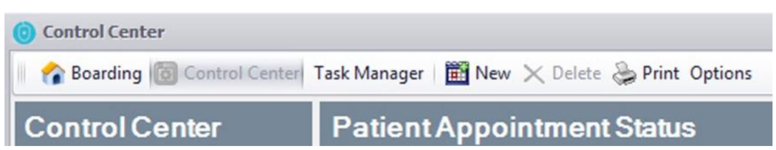
Control Center – Task Manager

In the Task Manager window in the right column, you can view an overall list of all tasks for the practice.

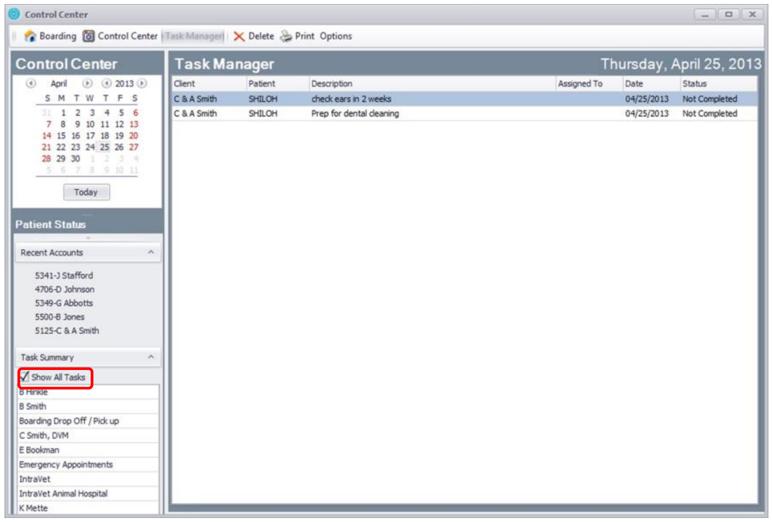
- Select the Control Center icon in the IntraVet toolbar to open the Control Center or select File | Control Center.



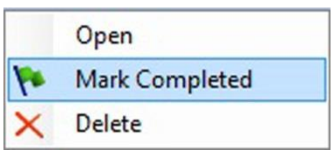
- Select the Task Manager icon. This will bring you to the Task Manager screen.



- When the Task Manager window opens, check Show All Tasks in the left column for a complete list, or double-click on a name to see only that patient's task list.



- Right-click in the window and select Mark Completed to quickly change a task to complete, or double-click a line to open the Task to edit. Edit Task window will open.

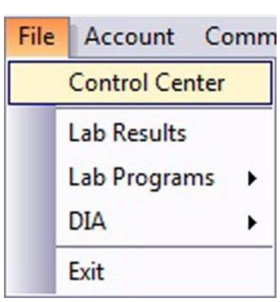


- Click the Control Center icon to switch back to the regular Control Center view.

Boarding Control Center

There is a specific control center that can be used for all Boarding patients.

- Select the Control Center icon in the IntraVet toolbar to open the Control Center or select File | Control Center.

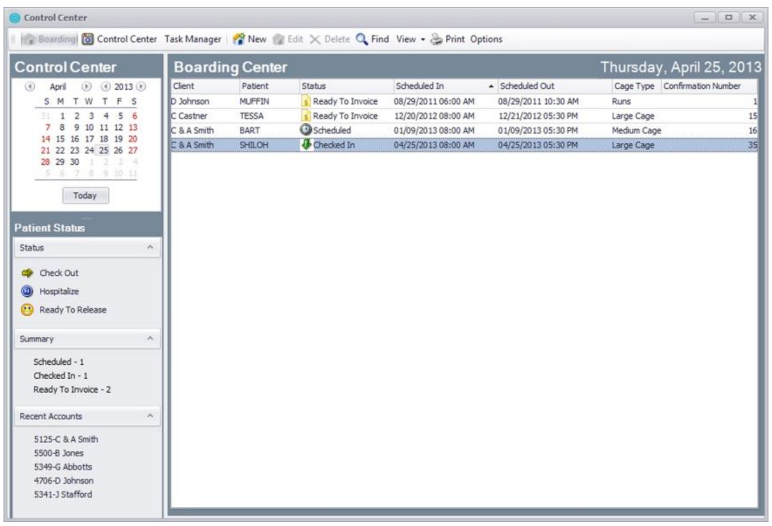


- Select the Boarding button (upper left). This will bring you to the Boarding Center screen.

Boarding Center Statuses

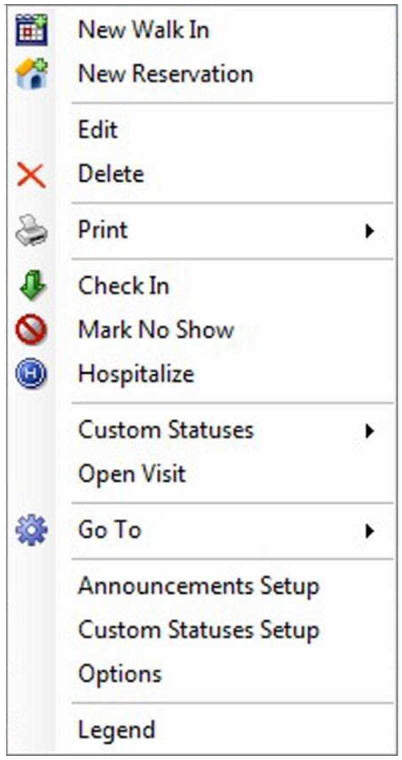
The Boarding Center is the central location for tracking which patients are scheduled to be boarded on a given day and what cage type they require as well as what status they are currently in. The following information is listed:

- Client
- Patient
- Scheduled In – What time the patient checked-in
- Scheduled Out – What time the patient checked-out
- Hospitalized
- Ready to Release
- Cage Type
- Confirmation Number



Boarding Control Center Options

- With Control Center open, right-click in the central portion of the white pane and select Options.



- **A window opens to the Boarding Control Center Options.**

The Entry Types, Status and Flags options affect which rows are displayed.

- **Select or deselect options to define how you want Control Center to appear.**
    - **If meets ALL specified criteria is selected, the patient appointment has to match exactly all options that are selected.**
    - **If meets ANY specified criteria is selected, regardless of what options are selected the patient appointment should appear on the Control Center.**
- There are two **Save** options. **Save for Branch** saves the options you selected as defaults for just that branch. If you have other facilities and you want them to have the same setup, click **Save for All Branches**.

  To apply the selected options for that patient and that particular viewing, click OK. Once the Medical History screen is closed and re-opened, the default options will re-apply themselves.

  ***If you open your Control Center and you do not see a patient on there that should be, you will want to look at the Boarding Control Center options you have selected. If you can't get the appointment to show on your Control Center, try checking all boxes including the Select All boxes at the bottom of the Options screen, as well as meets ANY specified criteria and click OK.**

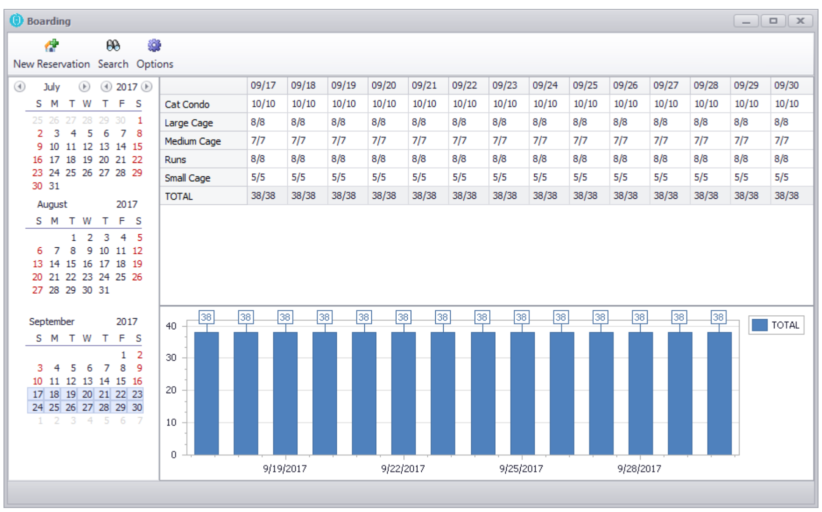
Boarding

To access the Boarding Reservation window, select the Boarding Availability icon  in the top left to schedule a reservation.

Boarding Reservation Grid

The Boarding button takes you to the boarding reservation grid, which shows you what availability you have for specific dates and cage types.

You can also make a New Boarding Reservation from this window.



Boarding Control Center

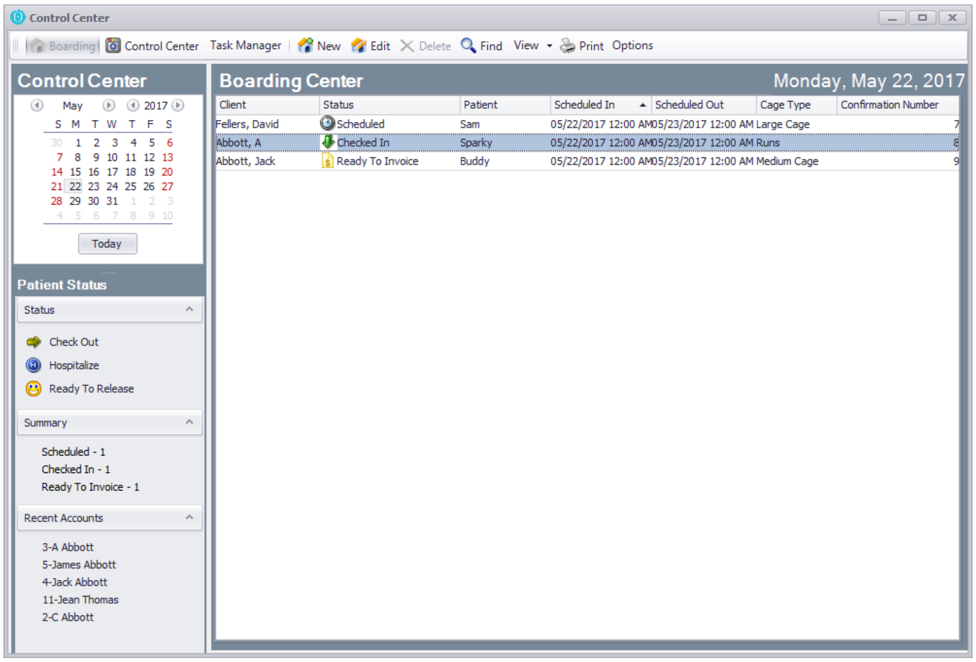
Within the Control Center you have access to the Scheduled Boarding Reservations by clicking the Boarding icon at the top of the screen.

The Boarding Control Center columns include:

- Client
- Status (status classifications are listed in the left column)
- Patient
- Scheduled In (date and time)

- Scheduled Out (date and time)
- Cage Type
- Confirmation Number

The left portion of the window contains a scrollable calendar and the Patient Status classifications.



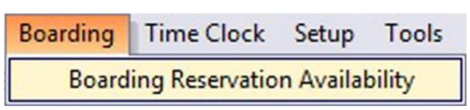
How to Make a Reservation

There are multiple ways to make a Boarding reservation: you can create a new reservation through the Boarding Reservation Grid, the Boarding Control Center or by following the steps below.

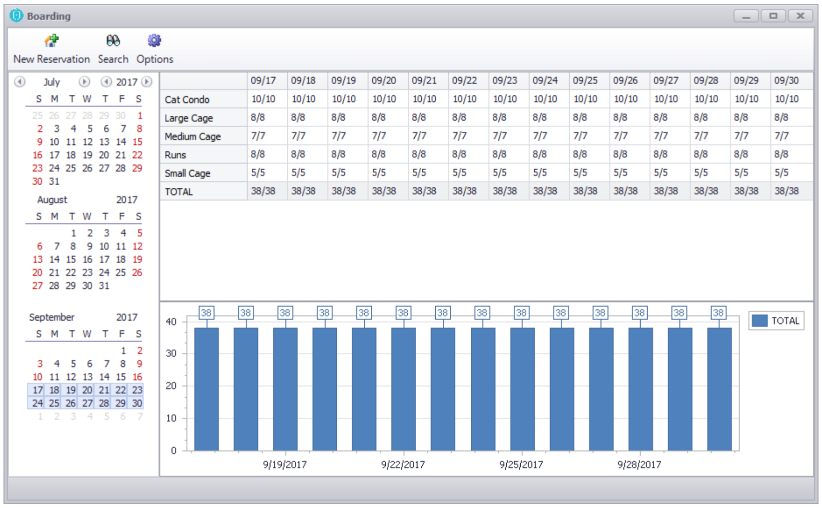
Check cage availability before making a reservation.

NOTE: Before opening the Boarding Availability Calendar, at least one cage type must be defined and set up in General Branch Setup | Boarding and associated with the current branch.

- From the IntraVet Menu Bar, select Boarding | Boarding Reservation Availability.

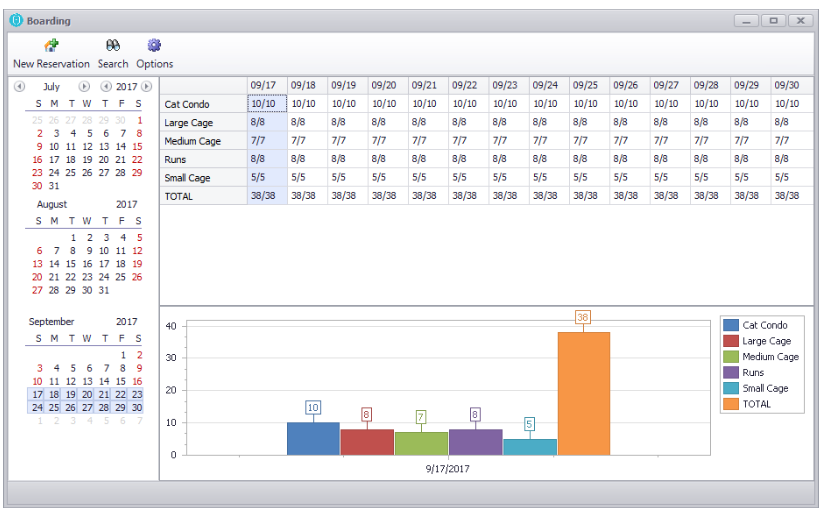


- The Availability grid displays a 14-day span. You can change which 14-day calendar portion displays by clicking on a date in a calendar in the left column.

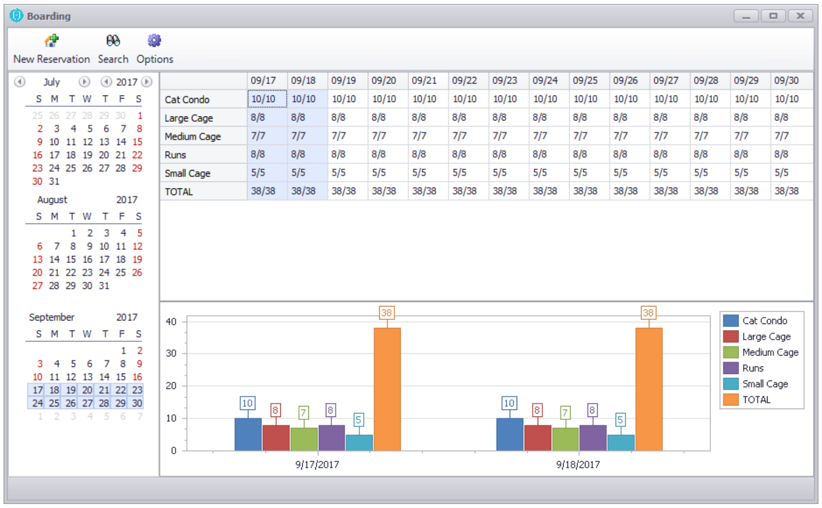


- **Use your Shift or Ctrl key along with your mouse to select and compare availability of more than one cage type.**

  Example: Hold down the Shift key, and with your mouse, click the first date (4/24 on the calendar) next to the cage sizes. The lower panel displays a bar chart of cage availability. If you use the Shift key it will highlight everything between the first and second selection made.

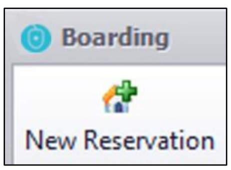


- **Next, hold down the Ctrl key, and with your mouse, click a date next to the small dog cage (4/26) and the medium cat (4/27). Use the Ctrl key to highlight multiple, individual selections.**



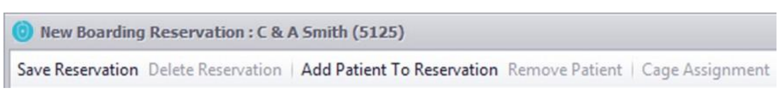
If you have overbooked cages, the bar graph will appear red.

- Select the New Reservation icon/hot link in the Boarding Reservation Availability Menu Bar.

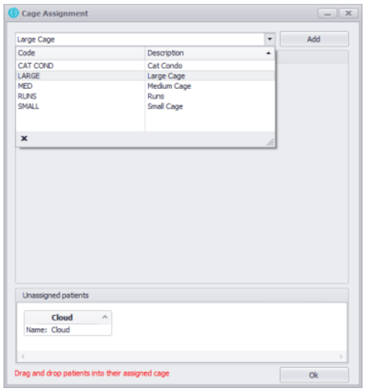


Reservations can also be made from Control Center | Boarding and click the New icon.

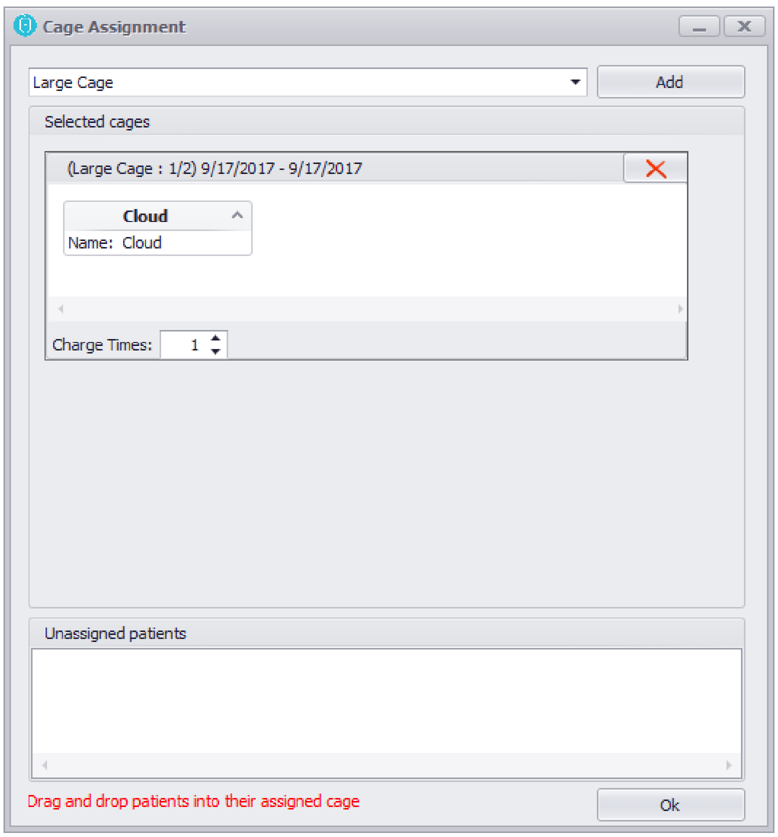
- To locate the client, click the Open Account icon, or type the name in the second blank field to the right. Press the Enter key on your keyboard to bring up your choices. Scroll and select the appropriate name. Click Use.
- Select the correct patient.
- Click Add Patient to Reservation in the New Boarding Reservation Menu Bar to select the patient. This will add the patient information to the Services tab.



- Select the Cage Assignment icon/hot link in the Boarding Menu Bar. This will open the Cage Assignment window.
- Click the down-arrow on the empty field at the top of the screen. Choose the appropriate cage size and type for the patient. Use the scroll bar to see all the choices if necessary. Once it has been selected, click Add to place in the Selected cages panel.



- Once the cage type has been selected, click-drag-and-drop the patient from the Unassigned patients panel to the Selected cages.
- Click OK.



An alert will be received if more than one workstation is accessing the same reservation date and time.

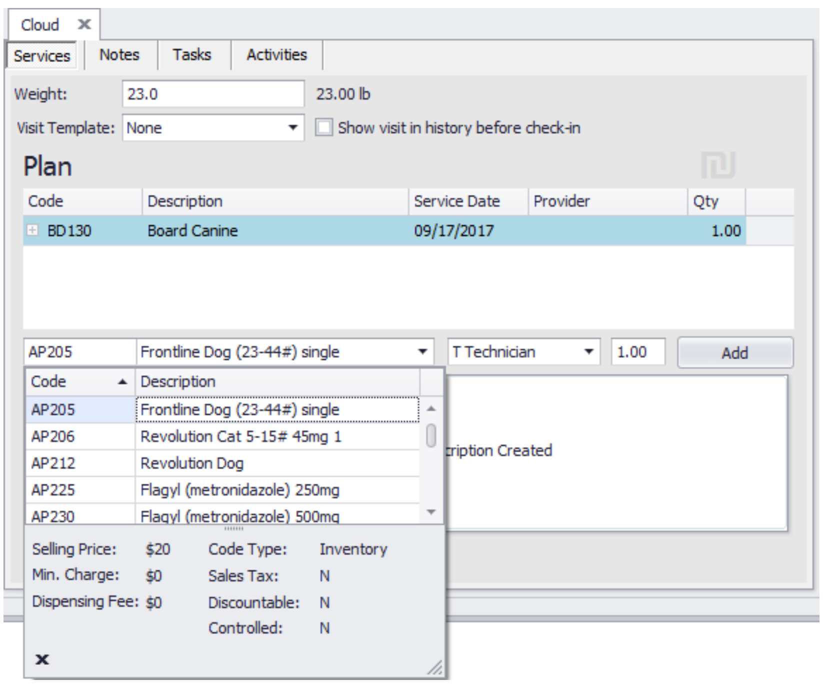
The sections explaining moving a patient to a different cage and split reservations follow this set of instructions.

- Back on the Boarding Reservation screen, click Enable to select the Start and End dates and times.
- When finished, click Set Dates.

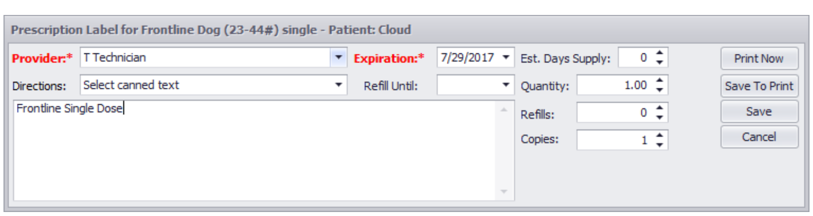
Services Tab

- The Services tab is selected by default.
- Weight – Pulls in from the patient's account. This field can be updated.
- Visit Template – Click the down-arrow if you would like to select a template for this reservation.
- Check Show visit in history before check-in if this applies.
- Use the blank entry line underneath Plan to add treatment plan services. Use the down-arrow or enter the first few letters of the treatment name. Double-click on the name to move it into the entry line.

  Other features, such as Vitals that are associated with a visit, are added through the Visit rather than the reservation. These steps are explained in How to Check in a Boarding Patient later in this chapter.
- With the treatment highlighted (surrounded by a dotted line), click Add to place the item into the grid. To remove an entry, right-click on it and select Delete.



- If the item involved is a prescription, the Prescription Label screen pops up. (See Medical History for detailed information on prescription labels.)

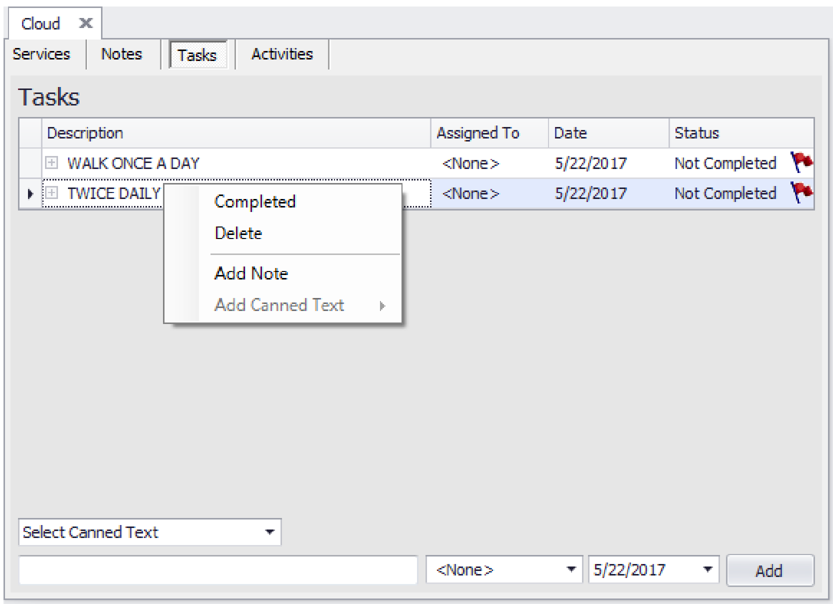


Notes Tab

- Click the Notes tab to enter notes regarding this patient.

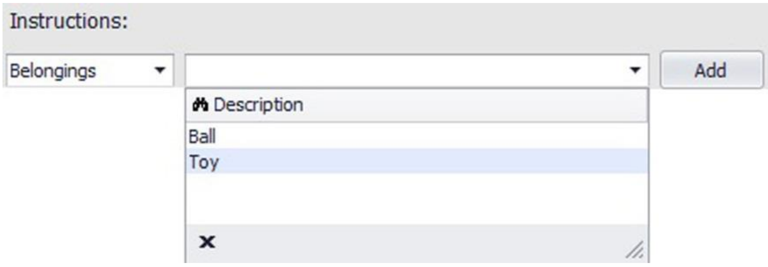
Tasks Tab

- Click the Tasks tab to add any special tasks requested for the patient's stay. They can be selected from the Canned Text. Click the down-arrow, scroll to locate and click once to select.
- Click the Add button to move the selected item to the Tasks list.
- Once the task has been completed, right-click and select completed.
- To remove the task, right-click and select Delete.
- To add a note, right-click and select Add Note.

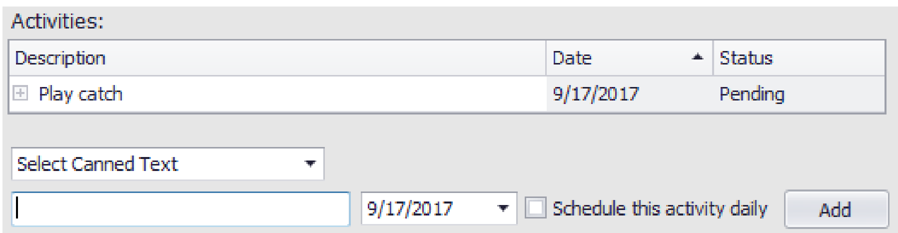


Activities Tab

- Click the Activities tab to make note of belongings brought for the patient, special instructions and extra activities requested (usually paid).
- Enter the Cage No./ID.
- Under Instructions, click the down-arrow and select from the following:
  - Belongings
  - Exercise
  - Feeding
  - Medication
- Select the down-arrow to the right to select the item. Click the Add button to place in the grid.

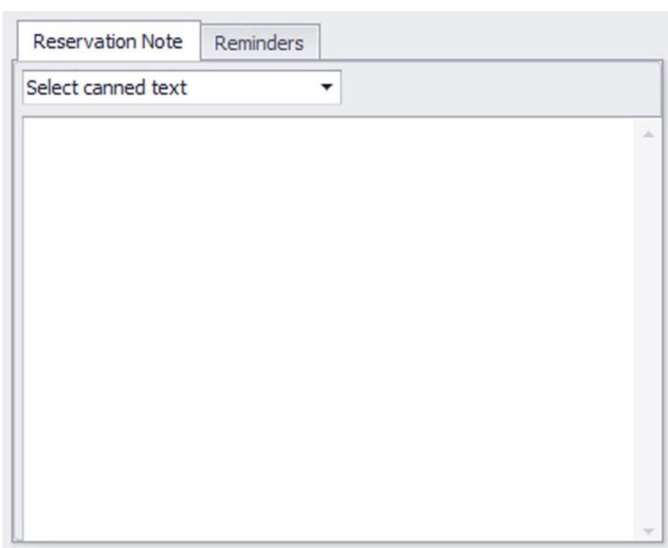


- **Under Activities, Enter the activity requested. They can be selected from the Canned Text. Click the down-arrow, scroll to locate and click once to select.**
- **Select the date desired or check the box Schedule this activity daily.**
- **Click the Add button to place in the grid.**

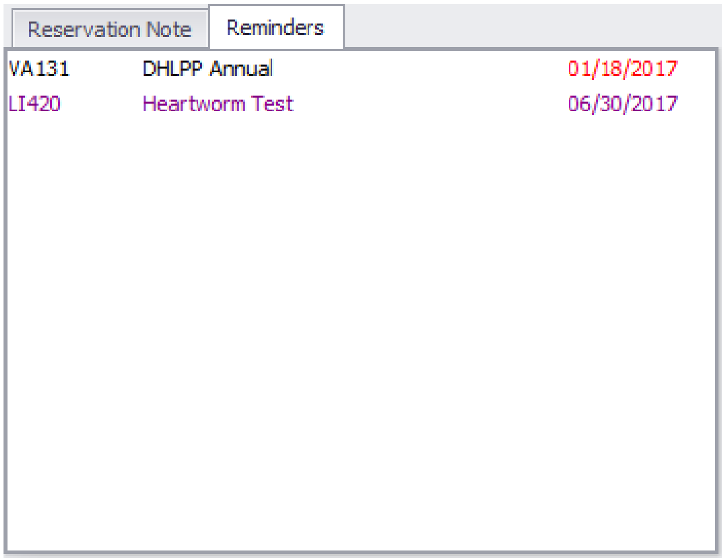


- **Patient Notes may be added to this screen. Type directly into the field to add your notes about this patient.**

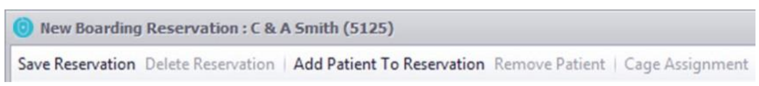
- **The Reservation Note field can be used to record emergency numbers, whether the client is supplying food for the patient(s), or other helpful information.**



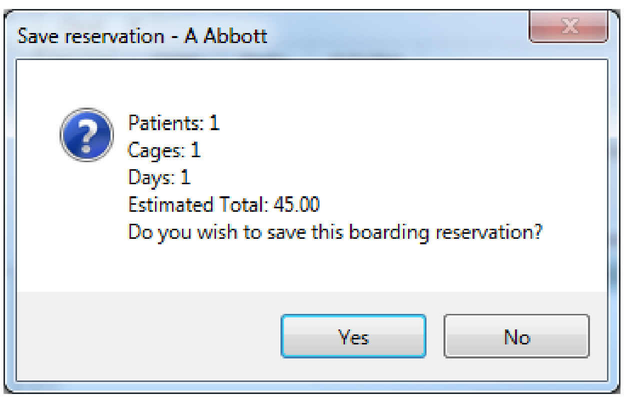
- **Reminders can be accessed through the reservation as well.**



- Click the Save Reservation hot link in the Menu Bar to place the patient into the Boarding grid.



- You will receive a prompt that asks you to confirm the reservation.



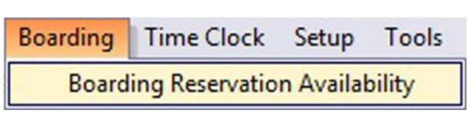
- If you have overbooking, split invoicing or confirmation numbers defined in General Branch Setup | Boarding, you may receive additional prompts.

How to Edit a Reservation

A reservation can be revised. Patients can be moved to the same cage or split into different cages. Cage sizes can be updated as well.

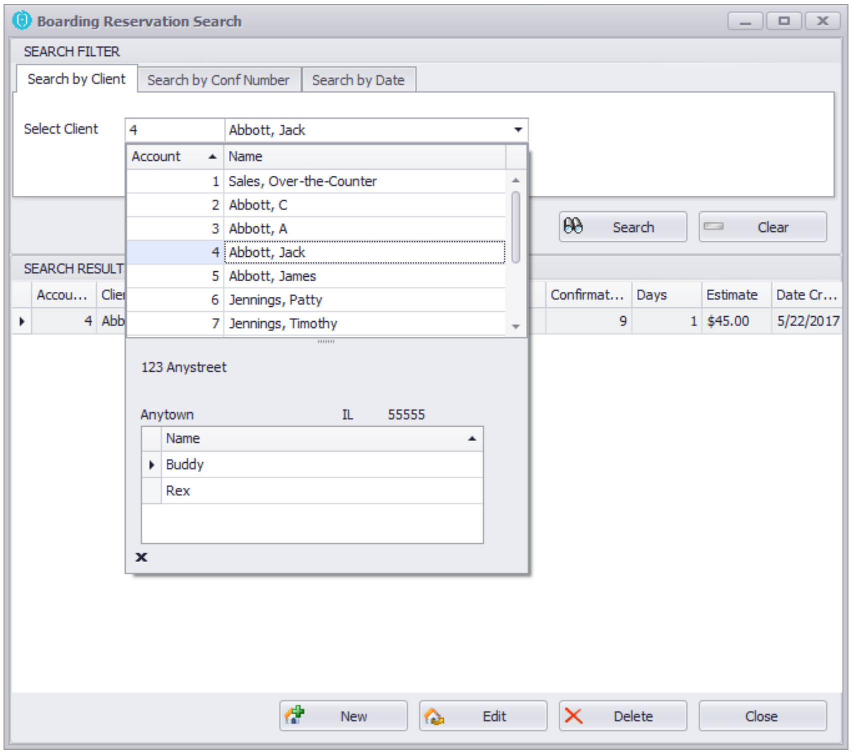
Search by Client

- From the IntraVet Menu Bar, select Boarding | Boarding Reservation Availability.

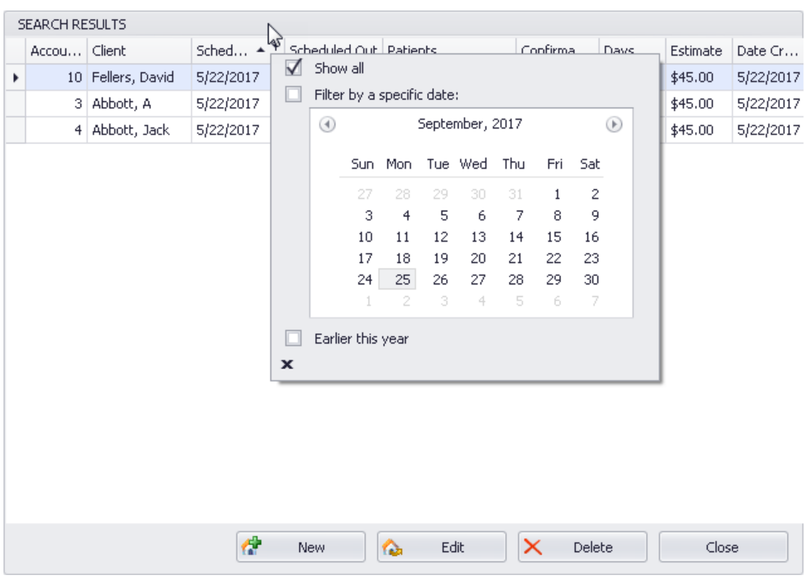


- Click Search.

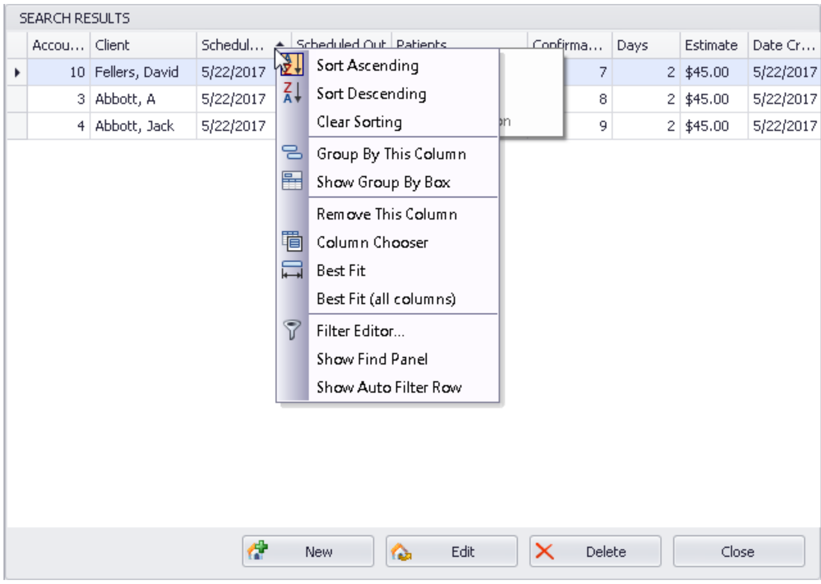
- Under Search by Client, use the down-arrow to scroll through and locate the client/patient.
- Double-click on the client.
- Click Search.
- Double-click on the Account/Name for your client.



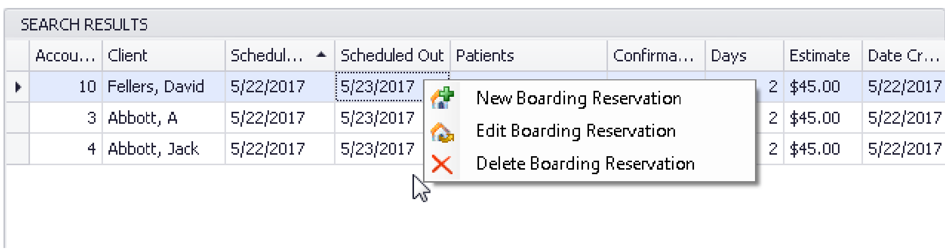
- This brings up the Search Results for that client's patients.
  - To filter, click on the push-pin in the column header to be filtered.



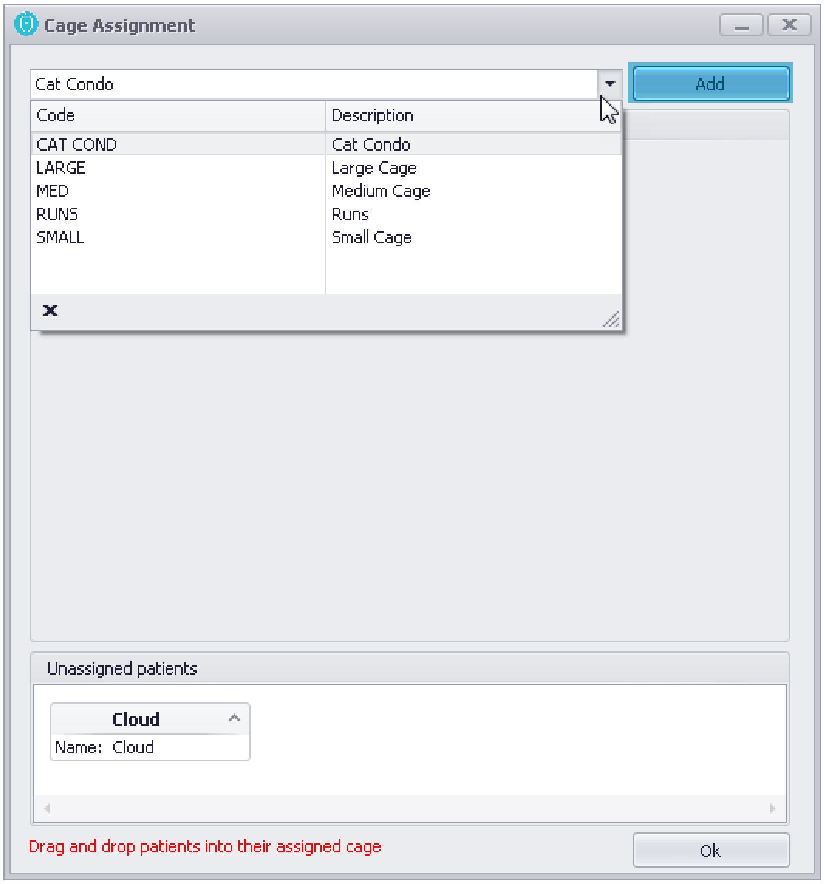
  - To sort, right-click on the column header to be sorted.



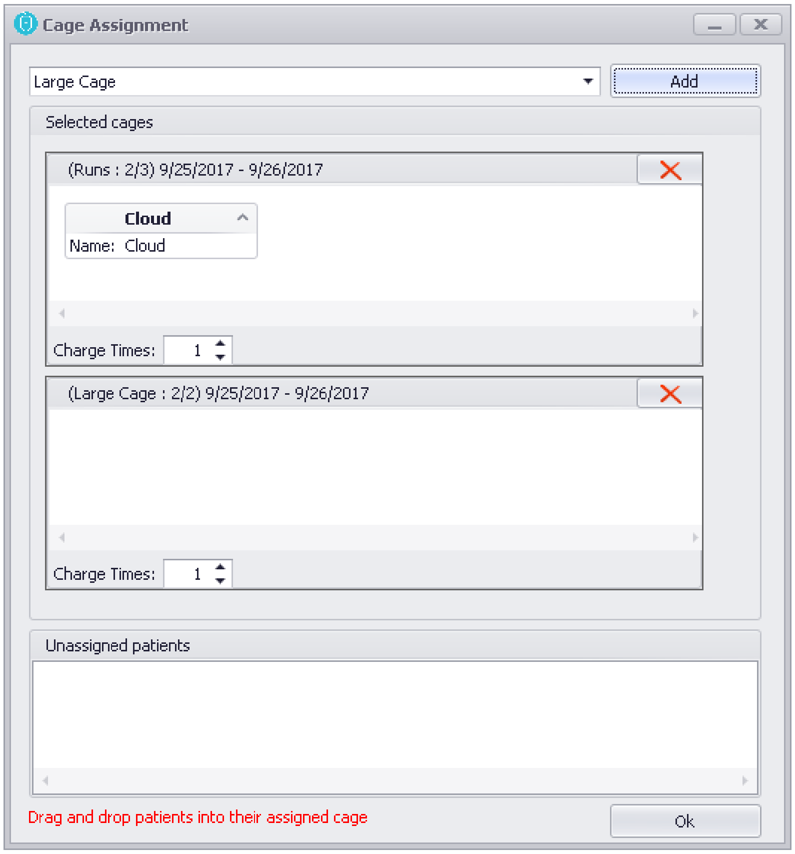
- To create New, Edit or Delete a reservation, right-click on the line associated.
- Select New, Edit or Delete Boarding Reservation. For this example, select Edit.



- Edit Boarding Reservation will open.
- Select Cage Assignment.
- Click the down-arrow on the field at the top of the screen. Choose the appropriate cage size and type, for the patient that is to be moved. Use the scroll bar to see all the choices if necessary.
- Once it has been selected, click Add to place in the selected cages panel.



- **Select the patient that is going to be moved, then drag-and-drop to the new location.**
- **Click OK.**
- **If you need to adjust the cage size on either patient, repeat the steps above.**
- **All cages must have a boarding patient assigned to them to continue. Delete any empty cages by clicking the red X .**
- **Click OK.**



Search by Confirmation Number or Date

To search by Confirmation Number or by Date, follow the instructions for Search by Client except for:

Confirmation Number

- Select the Search by Conf Number tab.
- Enter the Confirmation Number.

Date

- Select the Search by Date tab.
- Enter the Start and End dates using the down-arrow and the calendar provided.

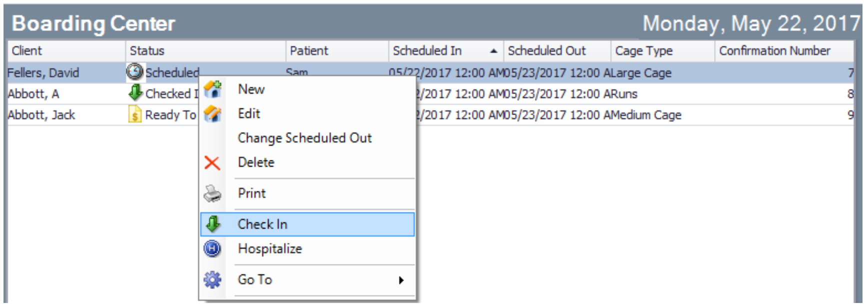
Check In a Boarding Patient

The patient can be checked in via the Boarding or Control Center windows.

If a patient is not checked in because of a no-show or cancellation and the reservation has not been deleted, the cage is unavailable for the duration of the reservation. Delete any no-shows and cancellations to reopen those cages for availability.

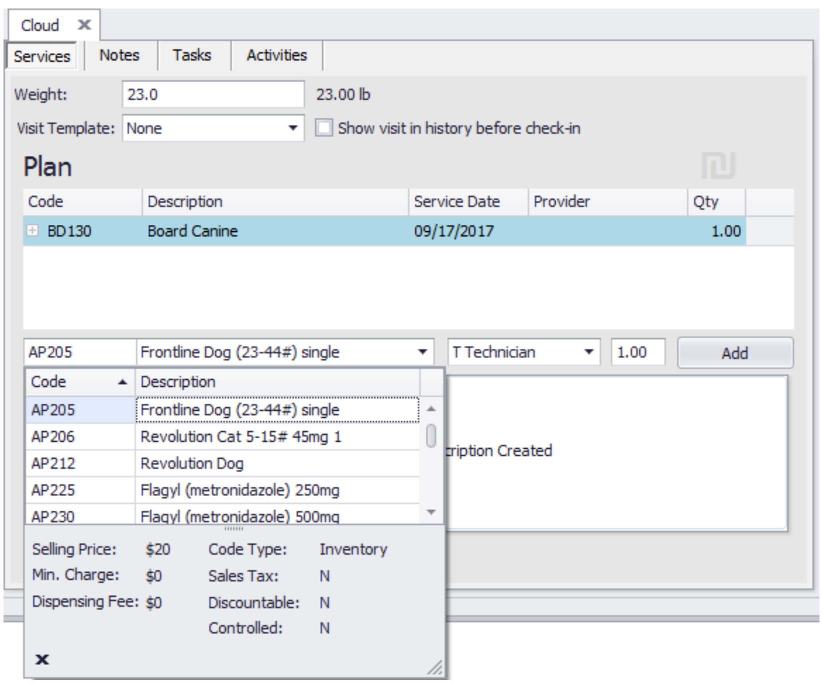
- Open the Control Center by clicking on the Control Center icon in the IntraVet Toolbar.

- Select the Boarding icon located in the Control Center menu bar.
- Right-click on the Client/Patient line for the patient you want to check in. A drop-down will appear; select Check In.



The reservation now displays as Checked In. You can also wait until the Visit form is completed and then check in the patient.

- Now that the reservation has been made and the patient is/is not checked in, complete the Visit form.



- Click the Control Center icon in the Control Center Toolbar to switch back to the Control Center grid.
- Double-click on the Client/Patient line to open the Visit.
- Use the Add/Remove Section options in the left column to add or remove (SOAP) elements for the visit.
- If necessary, add to the treatment Plan by adding services. Type the first few letters of the code/treatment name into a blank field. Once you locate your treatment choice, double-click on it to move it into the blank line.
- With the treatment highlighted (surrounded by a dotted line), press Enter to move through to the end of the entry line. Choose the Provider, if necessary.

- If Tasks was added to the Visit, enter a brief description of services to be provided. The services display under Tasks in the right column of the Control Center grid.
- To add an Estimate, Documents or Attachments, click the respective icon.

Estimates

For Estimates, see Estimates.

Documents

- Select the correct document(s). When you have finished your selection of documents, click OK to save. Click Cancel if you do not want to save.

Attachments

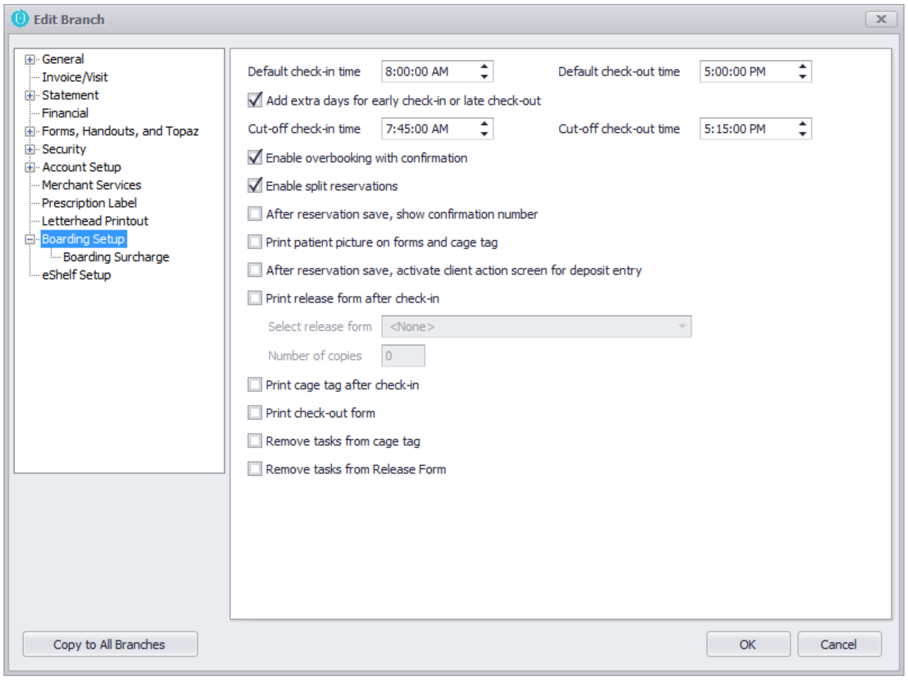
- Browse to the location of your attachment. Select and click Open. This will pull the attachment into the Attachments window. Repeat until you have completed your selection(s).
- Click the X in the upper-right corner to close the attachment window.
- When you have completed the form, click Save to save the Visit.
- Use the right column of the Control Center grid to add any Notes that the staff will need. If you included Tasks on the Reservation form, they display below Notes in the To-Do Items.
- Check in the patient by using the Patient Status/Status column on the left, or right-clicking on the client/patient line and selecting Check Patient In.
- If they are late for their appointment it will display as a No-Show.

ePetHealth

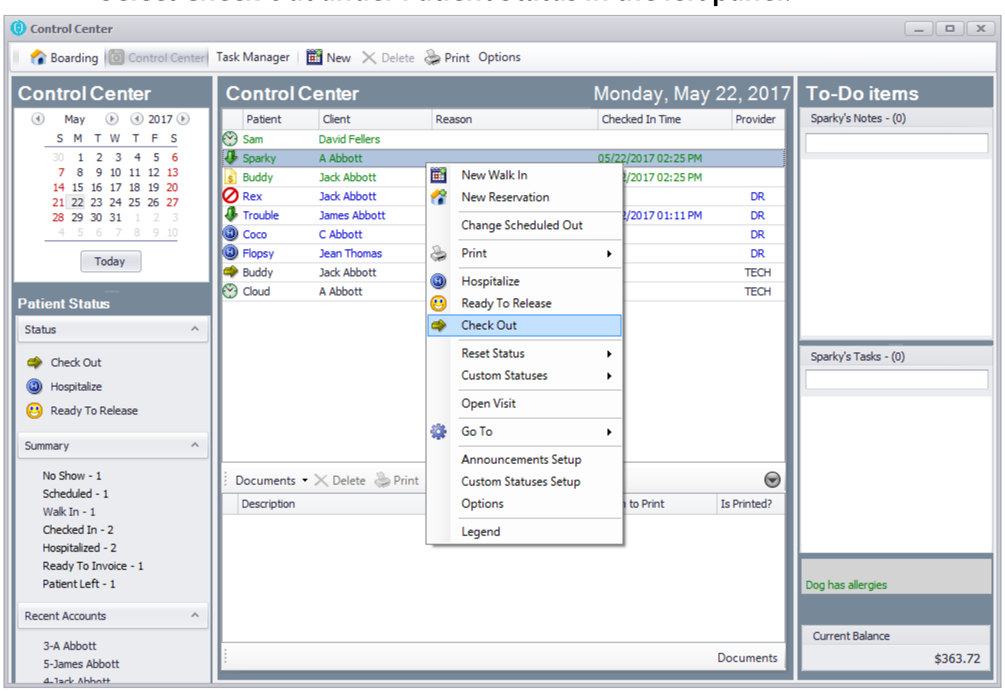
If you are logged into ePetHealth and select the ePetHealth button, the ePetHealth Client Education Articles page will open in your web browser.

Check Out a Reservation

Reservations ready to be checked out are indicated by a gold arrow pointing to the right. To check out a patient works on a reservation basis. Depending on the options chosen in Setup | Program | General Branch Setup | Boarding Setup, Check Out can open a Reservation Check Out window, send Boarding charges to the invoice and print a Check Out form that has patient information, instructions, scheduled activities and an optional patient picture.



- From the IntraVet Menu Bar, select the Control Center icon.
- There are two ways to Check Out a patient.
- Click to highlight the Patient/Client.
  - Right-click on the patient line under Patient Appointment Status (center panel) and select Check Out, or
  - Select Check Out under Patient Status in the left panel.



- When you check out a patient, the Client Account opens on the Invoice tab. This will process the Boarding and service charges.
- The client can now make their payment.

- **Click Save.**

intravet
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Visits and Invoices

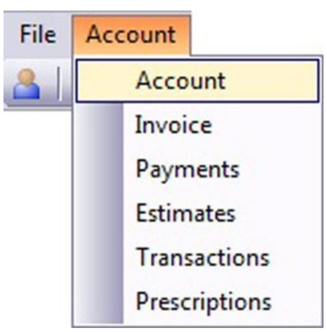
How to Access the Client's Account

There are four ways to access and open a client's account from different areas within IntraVet.

(Keep in mind if you are checking in and checking out a visit, the preferred method is through the Control Center by right mouse clicking and selecting Check In or Check Out.)

Method 1: Open Account

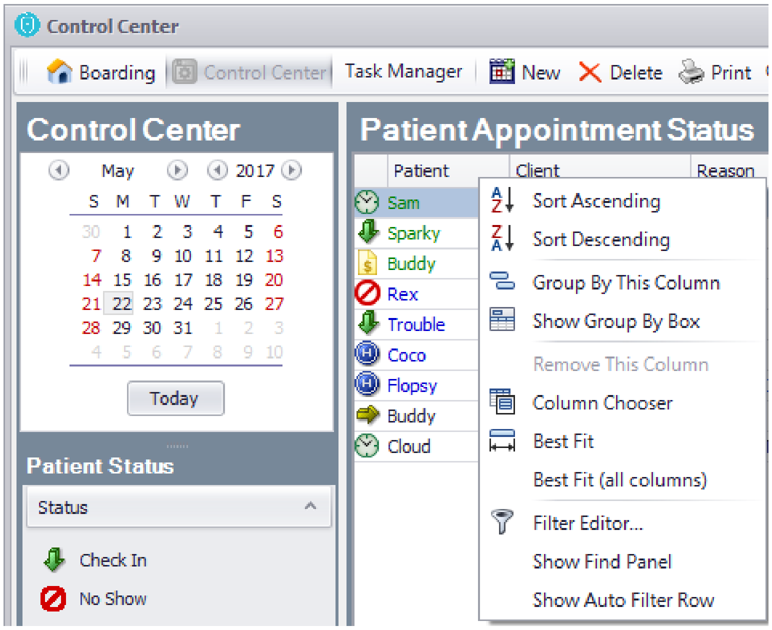
- From the IntraVet Main menu, select the Open Account icon . Or select Account | Account.



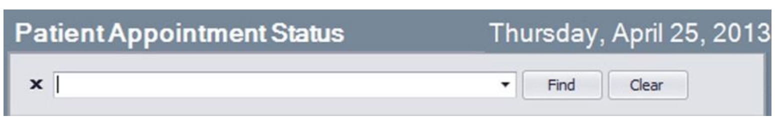
- Make sure the Auto Search is checked.
- In the Search field type the first few letters of the client's last name. That will bring those names up in the names list.
- Select the client you would like to access by either double-clicking on the name or selecting the line, and click Use. The client window will open.

Method 2: Control Center

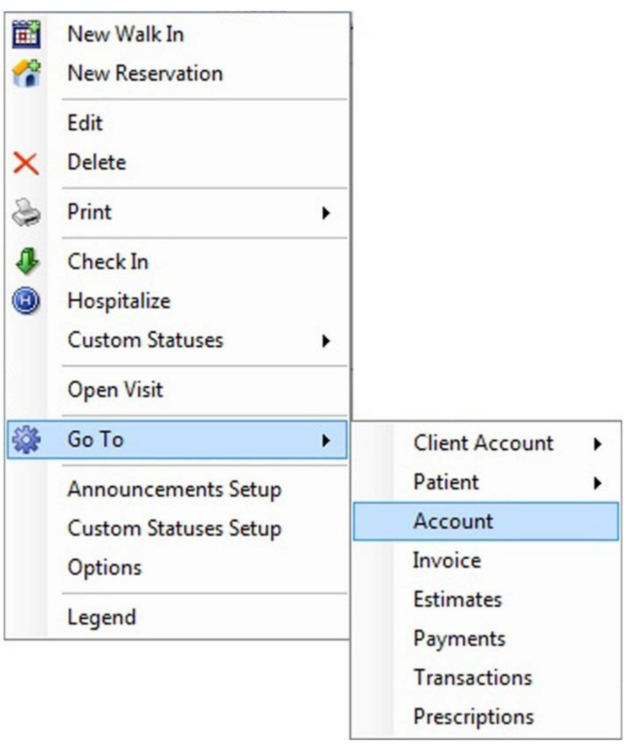
- From the main menu select the Control Center icon . Or select File | Control Center.
- Right-click on either Client or Patient and select Show Find Panel.



Find Panel appears.

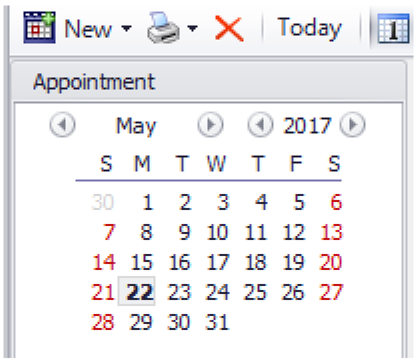


- Type the first few letters of the client's last name in the blank field.
- Click Find. Scroll, if necessary, to locate the client's name.
- If the patient is already listed in the Control Center, right-click on the client/patient line and click Go To | Account. The Client Account will open.

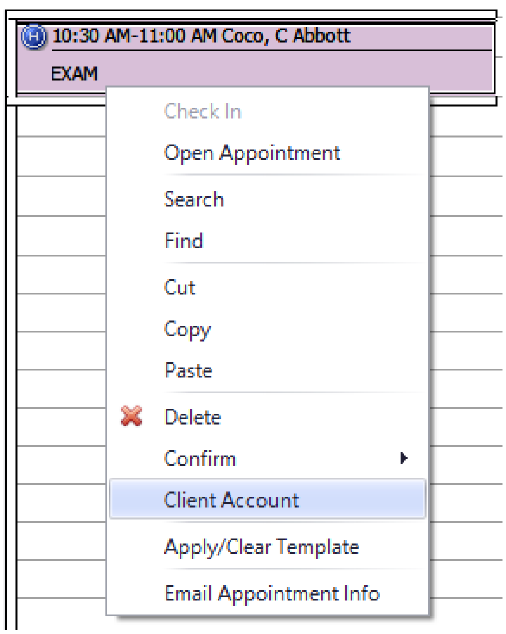


Method 3: Calendar

- From the IntraVet Menu Bar, select Appointments | Appointment Calendar. Or select the IntraVet Appointment Calendar icon. That will bring up the IntraVet Appointment Calendar.
- Use the calendar to locate the date of the client's appointment. Select the forward and backward arrows to select the month and year. Click through the days.



- Right-click on the appointment and select Client Account.



- Client Account will appear.

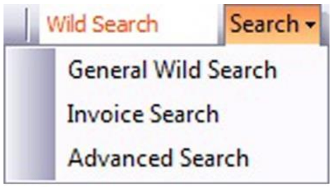
Method 4: Wild Search

Wild Search has three search options:

- General Wild Search
- Invoice Search

- Advanced Search

Refer to the Control Center chapter for a detailed description of each of the three Wild Search query instructions.



Visits

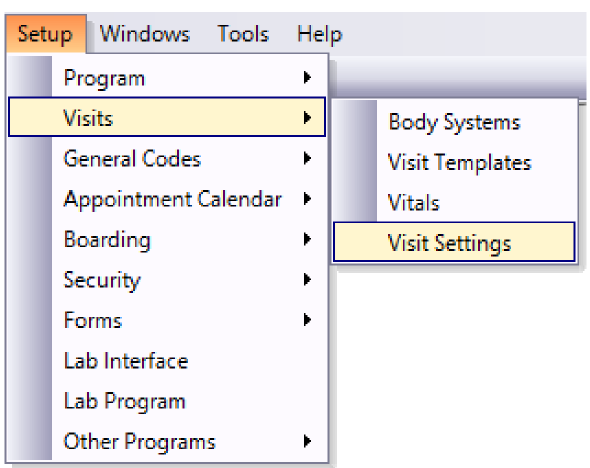
Medical history is stored by a patient visit. Visits include your subjective, objective, assessment, and plan items. They can also include your lab results, forms, and X-rays. The plan section of your visit can be used to start your invoice. Visits may be only one day or can be used for Hospitalized patients.

In medical history, they appear as a summary line that contains provider, visit template or reason and date, but each summary may be expanded for all the details. This provides a quick view of what types of problems or activity the patient has had overall and the ability to drill down to the specifics.

Visit Settings

You can set defaults to control the way a visit opens, what information it displays and pre-invoice options.

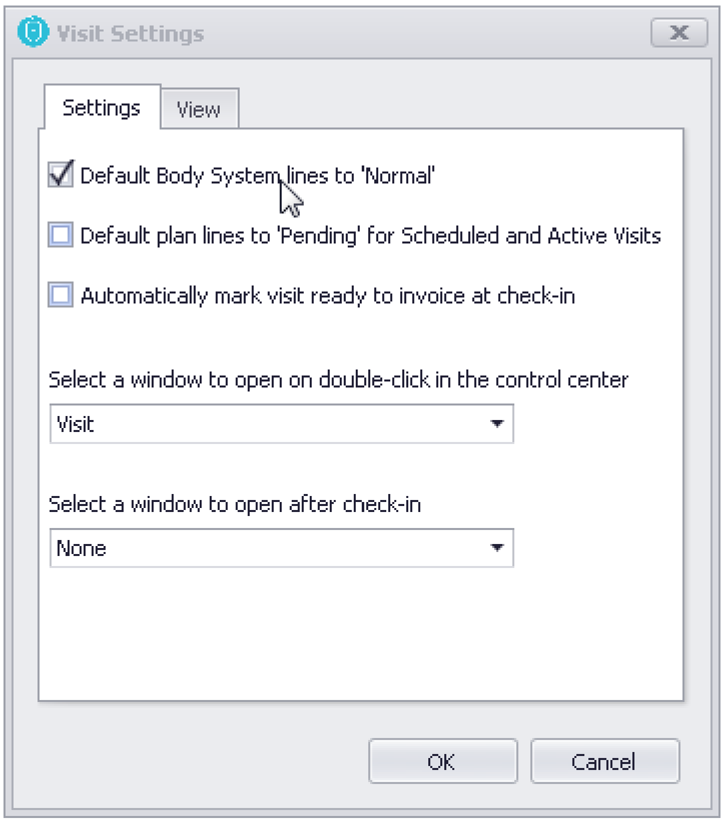
- From the IntraVet Menu Bar, select Setup | Visits | Visit Settings. The Settings tab opens by default.



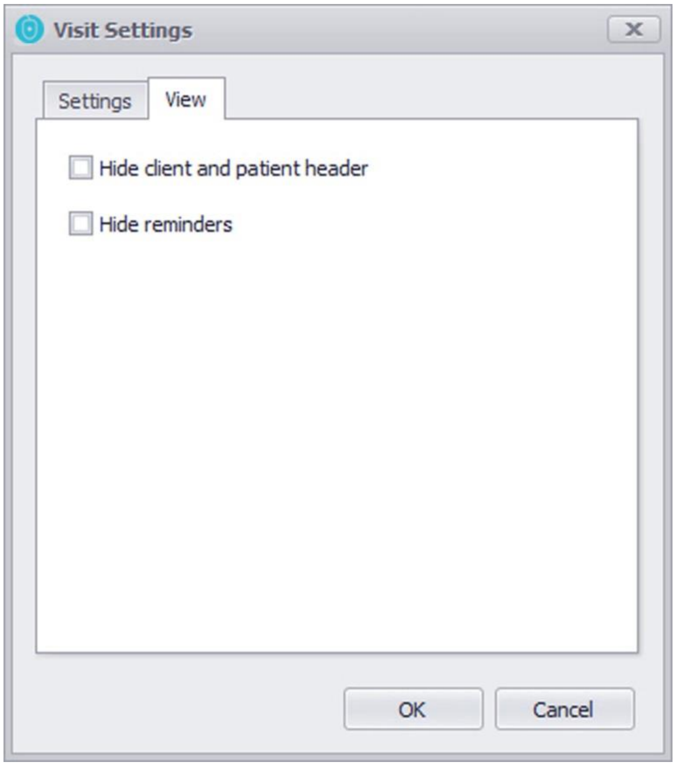
- Click Default Body System lines to 'Normal' which may be more time-efficient than individually changing this setting for each item when the Visit window is open.

- There is more than one invoice-related status that can be set prior to invoicing the client. Click the Default plan lines to 'Pending' for Scheduled and Active Visits checkbox. It is unlikely that a client would reject any item in the patient's treatment plan. When unchecked, the plan line defaults to Send to Invoice.

- Check the Automatically mark visit ready to invoice at check-in checkbox to make it more convenient during the check-out/invoicing process.
  - If this option is checked you no longer have the option to mark the patient as hospitalized. The visit will need to be marked as Scheduled which will then remove anything that has been added to that patient's visit and then you have the option to mark it Hospitalized.
- Click the down-arrow to select which item you want to open when double-clicked.
- You can also select a default window to open once the patient has been checked in. Click the down-arrow to make your selection.
- When complete, click OK.



- Select the View tab.
- Select Hide client and patient header to hide that information when the window opens. If you need to refer to the client/patient information after the window opens, click the + to display the information.
- Click Hide Reminders to hide Reminders by default.
- Click OK.



Visit Templates

A Visit Template is a time-saving way to have customized SOAPs for common visit types already set up prior to a client/patient's appointment. These Visit Templates can be attached to a patient's appointment and/or visit.

Visits and Visit Templates provide the following:

- An unlimited number of customized Visit templates (SOAPs) can be created, one for – Canine annuals, Feline dental cleanings, Surgeries, etc.
- Services, documents (such as client handouts), consent forms and notes associated with that visit type can be added to the template so they load automatically.

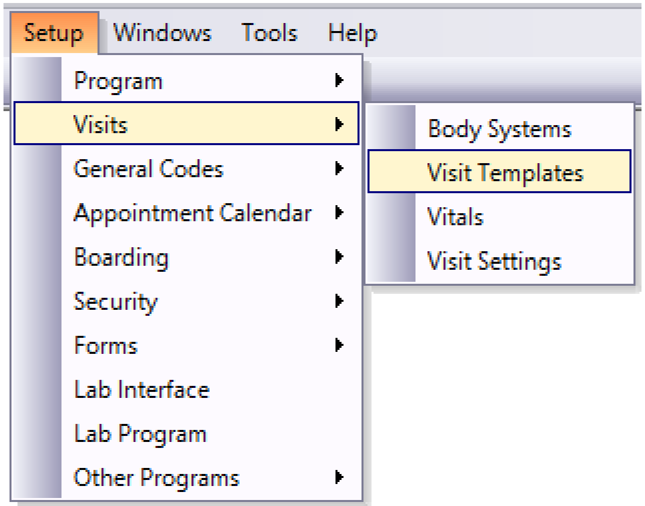
Visit and Estimate codes must be set up before creating templates. Refer to the chapter General Codes Setup.

Visit Template Setup

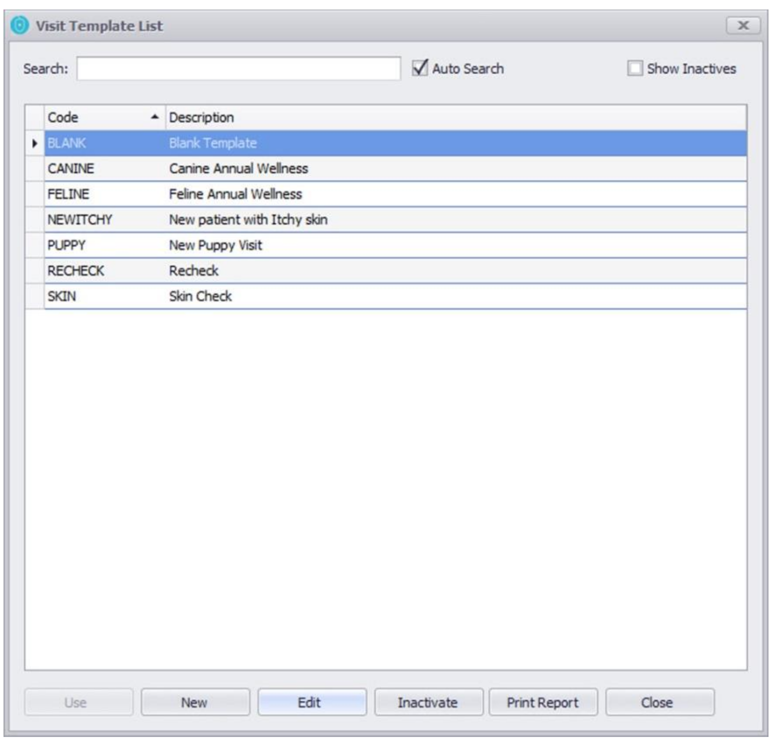
Templates include vitals, abnormalities, and tasks so that you can take advantage of these in the Visit Template setup.

How to Create a Customized Visit Template

- From the IntraVet Menu Bar, select Setup | Visits | Visit Templates.



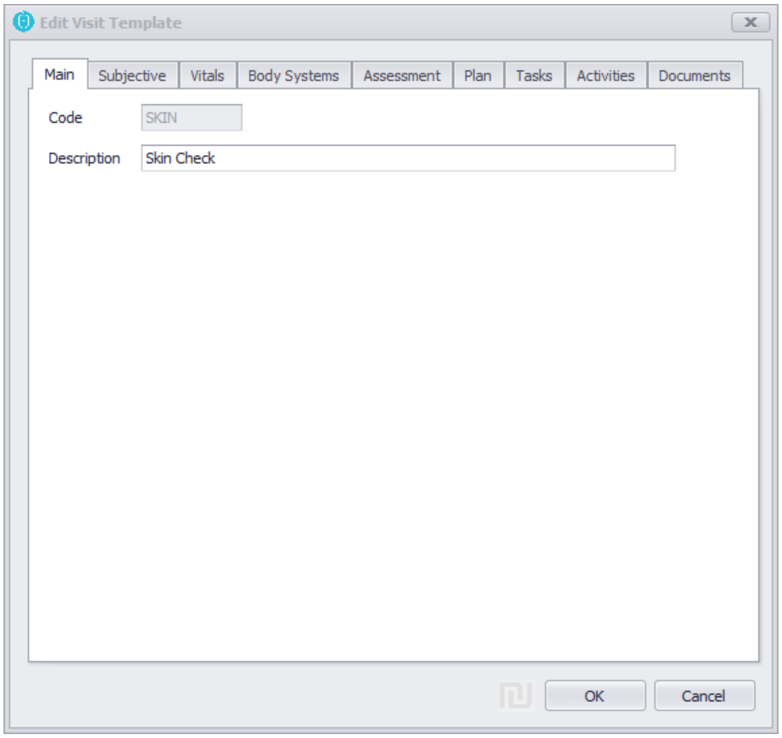
- Visit Template List screen opens.
- Click New to create a new Visit Template or Edit to update. The Inactivate button will inactivate a template.



- Once you have selected a Code/Description, click Edit.
- Open each of the tabs to set up your usual treatment for this particular visit. See Edit Visit Template example below.

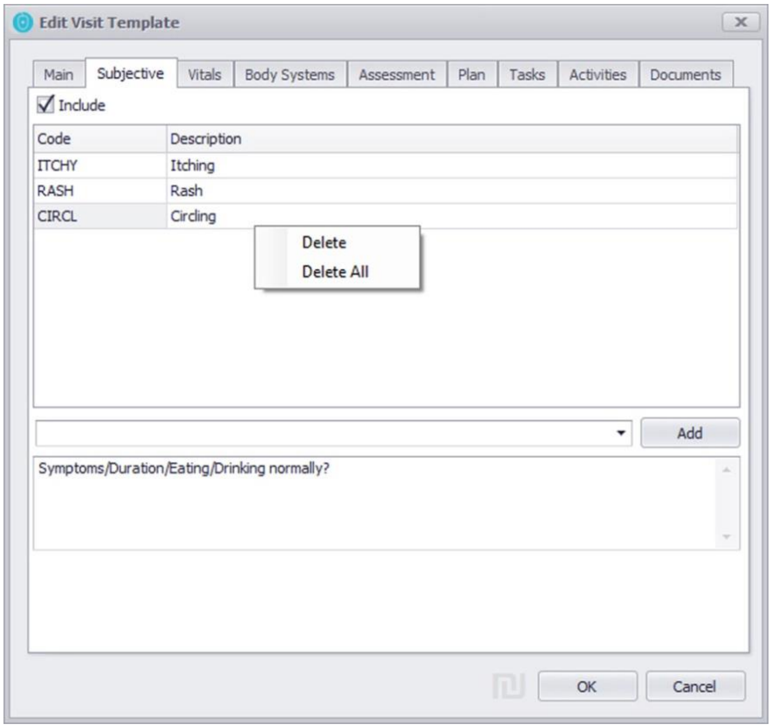
Edit Visit Template Main:

- The Code cannot be changed. The Description may be changed.
- To continue, select another tab. To accept your changes and close, click OK.



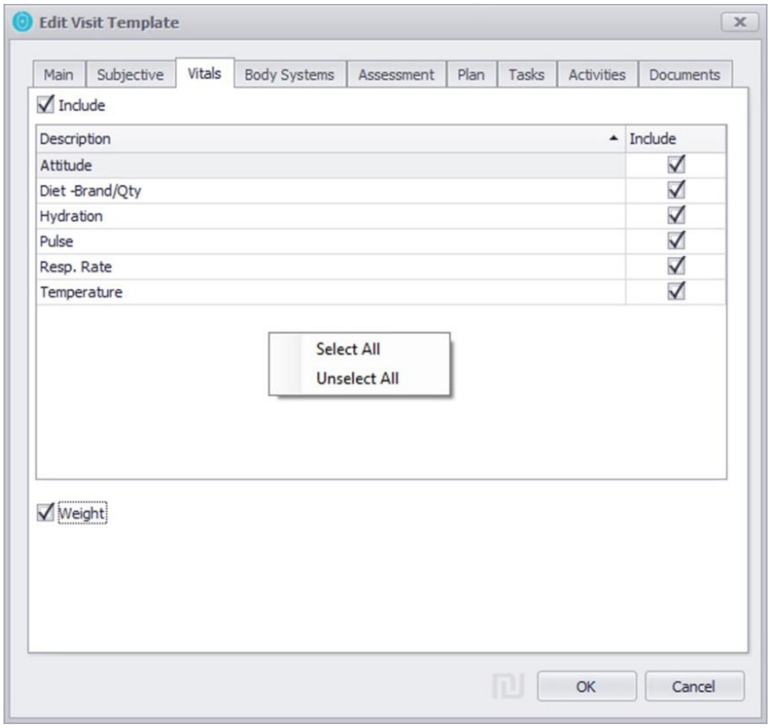
Subjective:

- Click the Subjective tab to enter presenting complaints.
- To enable edits, click the Include box.
- In the middle of the screen, click the drop-down box and scroll to select the desired code/description. Click Add to move it to the code/description grid.
- To remove an item, right-click on the line item and select Delete. Delete All will remove all the codes/descriptions.
- To add notes to your custom template, click in the blank field at the bottom. Enter information pertaining to this template.
- To continue, select another tab. To accept your changes and close, click OK.



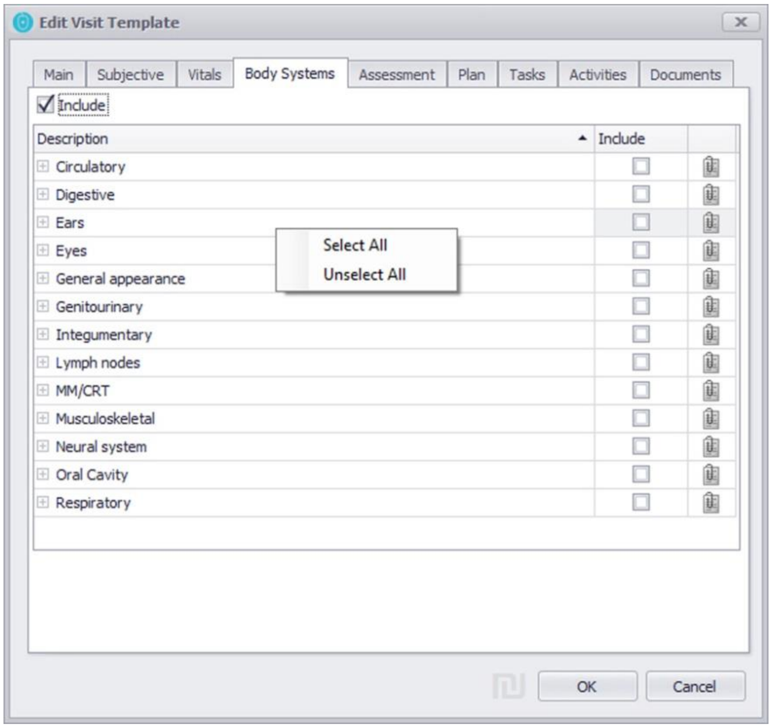
Vitals:

- Click the Vitals tab.
- To enable edits, click the Include box.
- Check each vital you want to include in the template.
- To Select All or Unselect All, right-click in the description field and select.
- Check the Weight box to add this to your Visit Template.
- To continue, select another tab. To accept your changes and close, click OK.



Body Systems: By default, all items are checked.

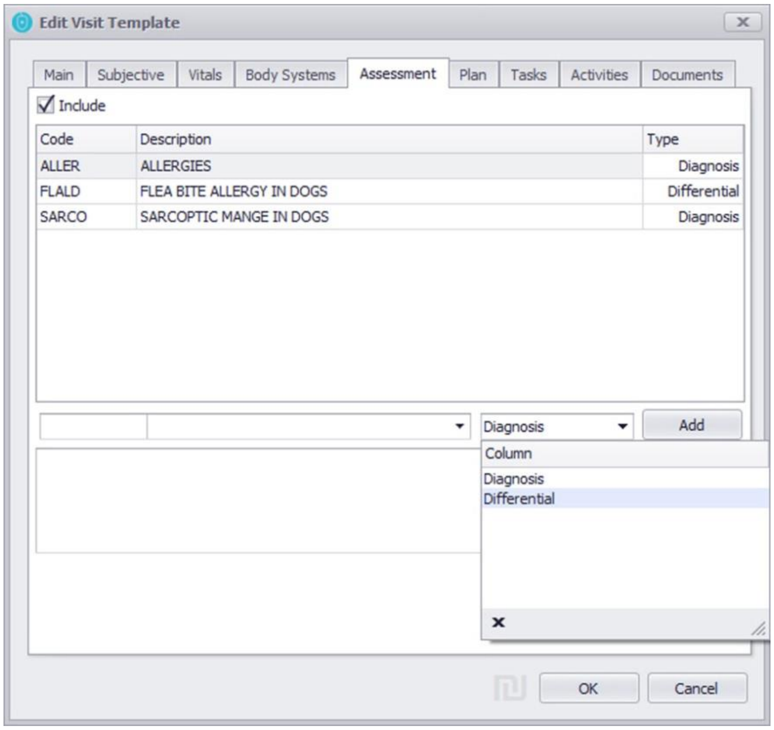
- Click the Body Systems tab.
- To enable edits, click the Include box.
- Uncheck each system you do not want in the template.
- To Select All or Unselect All, right-click in the description field and select.
- To add an attachment, select the icon with the paperclip.
- To continue, select another tab. To accept your changes and close, click OK.



Assessment:

- Click the Assessment tab. (Assessment is optional.)
- To enable edits, click the Include box.
- Click in the Diagnosis field in the lower portion of the window to select the default assessment.
- In the pop-up, select Diagnosis or Differential. This accepts your choice and closes the pop-up. Use the dotted triangle to resize the pop-up.
- Enter a diagnosis code or description by typing the first letter(s) in either the left or center blank field to the left of the default Diagnosis option, or click the down-arrow and select from the pop-up list.

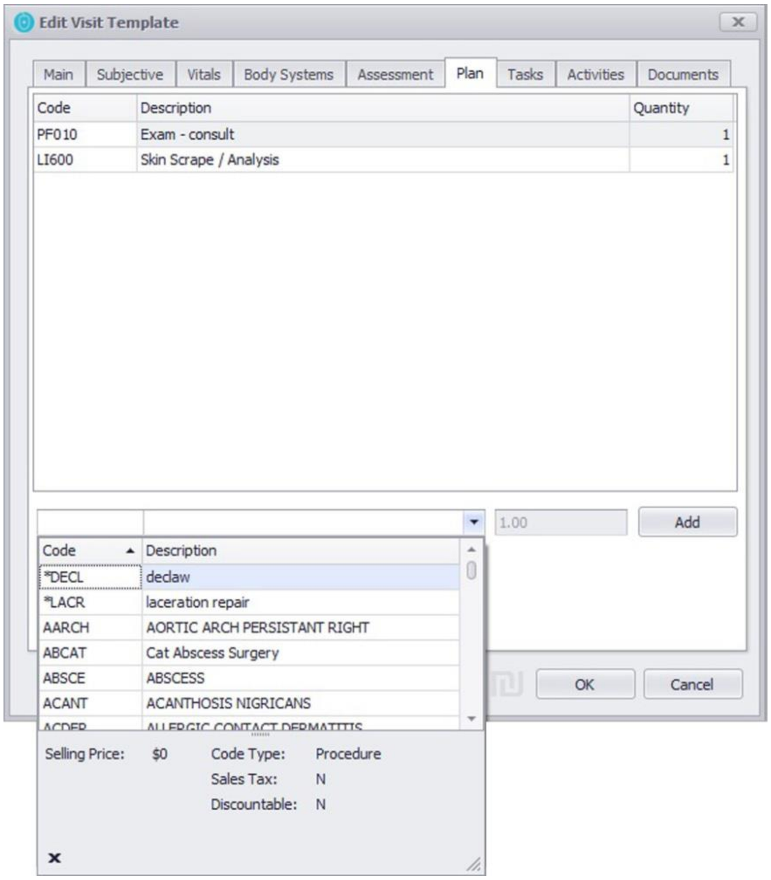
  If the wrong letters were typed in, or you change your mind before the pop-up closes, click in the field again and type new letters. Another option is to use the scroll bar to locate the code/description choice and double-click or press Enter to select. If the pop-up is closed, click in either field and retype the new choice.
- To move the selection into the main pane, click the Add button to the right of the default assessment field.
- To remove an item, right-click on the line item and select Delete. Delete All will remove all the codes/descriptions.
- To add notes to your custom template, click in the blank field at the bottom. Type information pertaining to this template.
- To continue, select another tab. To accept your changes and close, click OK.



Plan: Include the services and inventory you would normally use in a case of this kind.

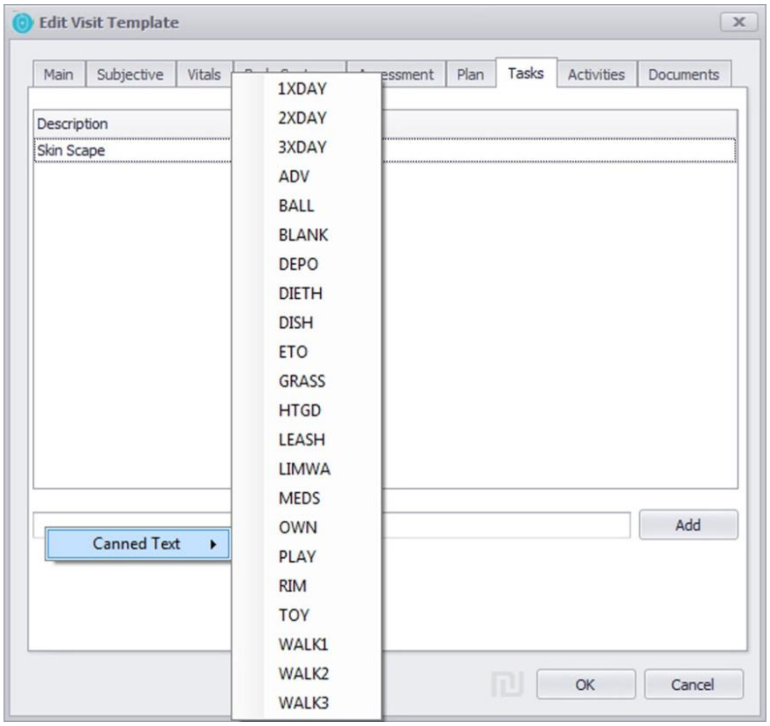
- Click the Plan tab.
- Enter a procedure code or description by typing the first letter(s) in either the left or center blank field at the bottom of the screen, or select the down-arrow and select from the pop-up list.

  If the wrong letters were typed in, or you change your mind before the pop-up closes, click in the field again and type new letters. Another option is to use the scroll bar to locate the code/description choice and double-click or press Enter to select. If the pop-up is closed, click in either field and retype the new choice.
- To move the selection into the main pane, click the Add button to the right of the default assessment field.
- To remove an item, right-click on the line item and select Delete. Delete All will remove all the codes/descriptions.
- To add notes to your custom template, click in the blank field at the bottom. Type information pertaining to this template.
- To continue, select another tab. To accept your changes and close, click OK.



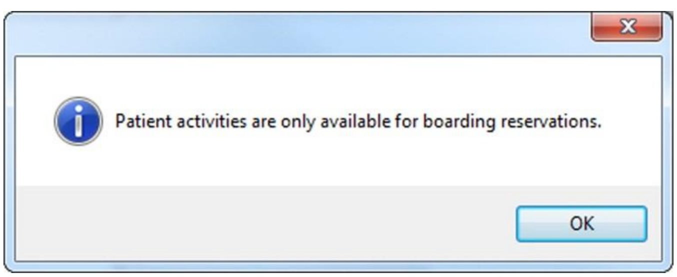
Tasks:

- Click the Tasks tab.
- To select pre-created text, right-click in the blank field to the left of the Add button. Select Canned Text.
- Click once to select the canned text.
- To move the selection into the main pane, click the Add button to the right of the field.
- To remove an item, right-click on the line item and select Delete. Delete All will remove all the descriptions.
- To add notes to your custom template, click in the blank field at the bottom. Type information pertaining to this template.
- To continue, select another tab. To accept your changes and close, click OK.



Activities:

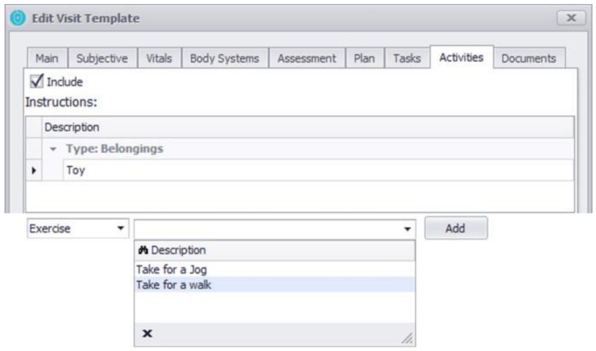
- Click the Activities tab.
- To enable edits, click the Include box.
- Information screenshot appears.
- Click OK.



The Activities tab has three sections:

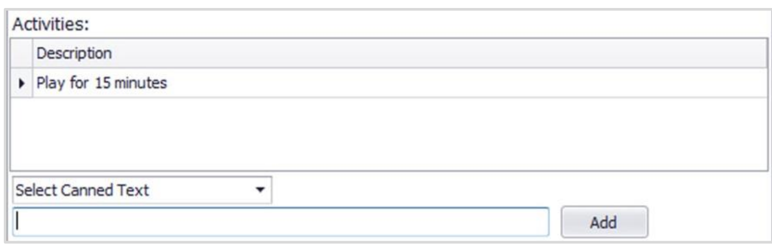
Instructions:

- To add instructions for Boarding click the down-arrow and choose Belongings, Exercise, Feeding or Medication.
- Click the down-arrow next to your selection and choose a description.
  - Freeform text can be added.
- To move the selection into the main pane, click the Add button to the right of the field.
- To remove an item, right-click on the line item and select Delete.



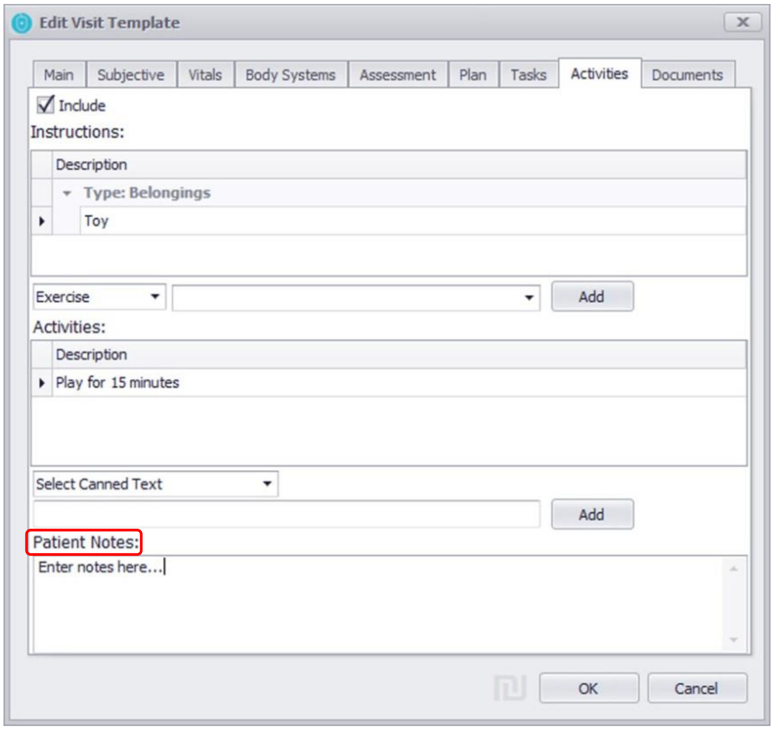
Activities:

- If you have canned text created, click the down-arrow and select or type Activities in the blank field next to the Add button.
  - Freeform text can be added.
- To move the selection into the main pane, click the Add button to the right of the field.
- To remove an item, right-click on the line item and select Delete.



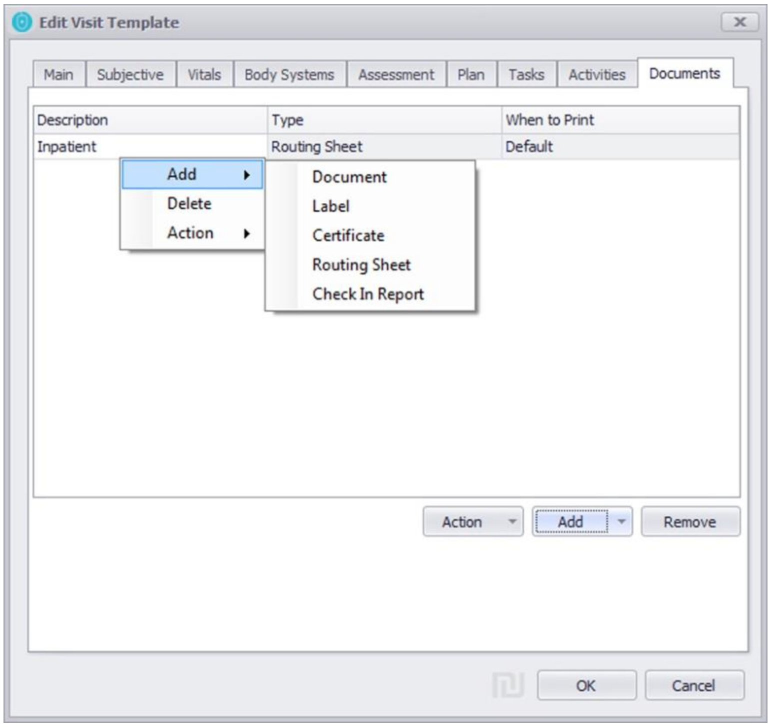
Patient Notes:

- To add notes to your custom template, click in the blank field at the bottom. Type information pertaining to this template.
- To continue, select another tab. To accept your changes and close, click OK.



Documents:

- Click the Documents tab.
- Right-click or click the down-arrow next to Add to add documents you want to print with this type of visit:
  - Document – If selected, will open the Document Code List. Click once to select; then click the Use button to attach.
  - Label – If selected, will open the Label List. Click once to select; then click the Use button to attach.
  - Certificate – If selected, will open Certificates. Check the boxes next to the certificates you would like printed. Click OK.
  - Routing Sheet – If selected, will open the Routing Sheet List. Click once to select; then click the Use button to attach.
  - Check In Report – If selected, will add the Check In Report to the Edit Visit Template.
- Right-click on a line item or click the down-arrow next to Action to set when you want to print:
  - Default
  - Print At Check In
  - Print At Check Out
- To remove a line item, click once to select. Right-click and select Delete or select the Remove button next to Action and Add.
- Click OK.

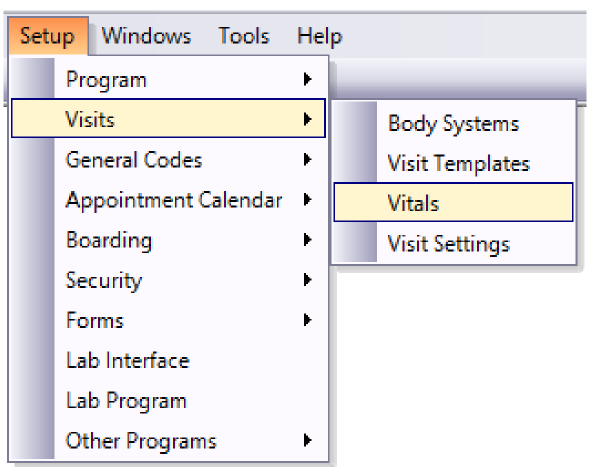


Vitals

Set up Vitals to use in your Visit Templates. You can decide whether to use none, some or all in each visit template that you create. You can enter multiple sets of vitals within the same visit.

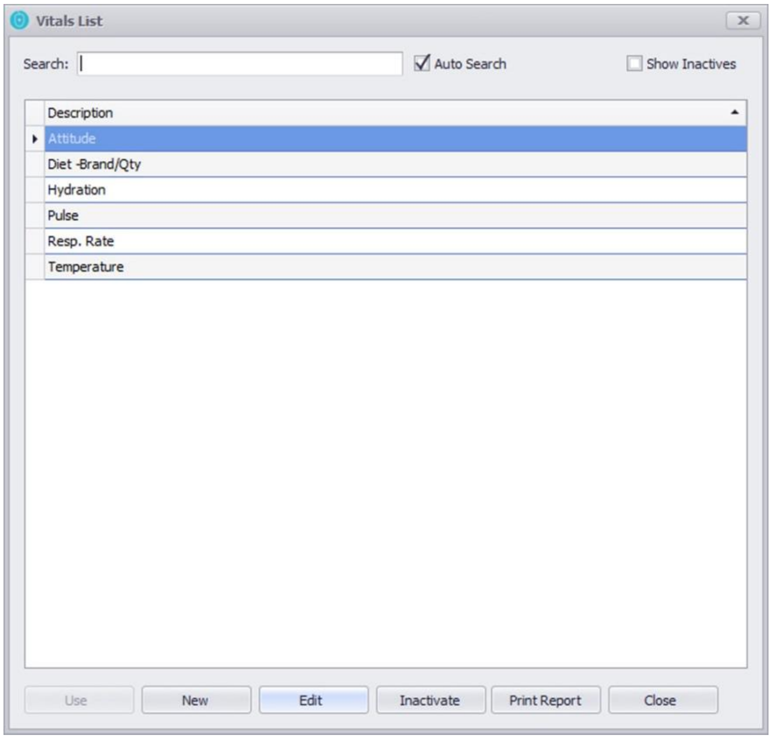
How to Add Vitals

- **From the IntraVet Menu Bar, select Setup | Visits | Vitals.**

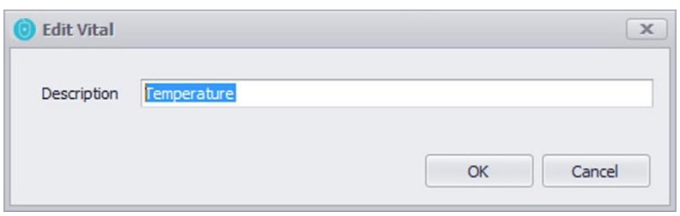


- **The Vitals List screen will appear.**
- **To search, Enter the Search field to locate a Description if the list is long and Auto Search is selected. You can also scroll through the list. To search inactive descriptions, click Show Inactives.**

- Click New to create a new vital description. Click Edit to change a description. Click Inactivate to inactivate a vital.



- Enter a new Vital Description by typing a description into the Description field.



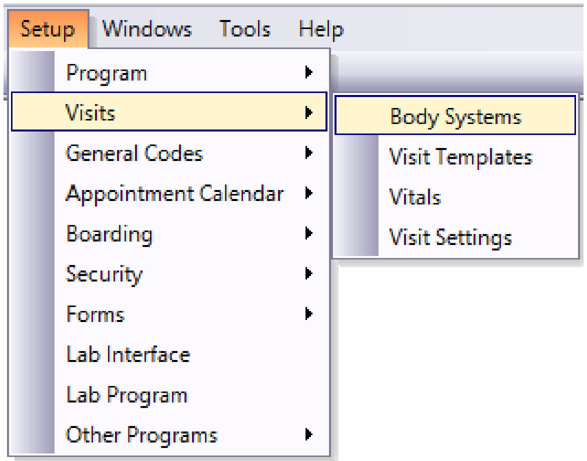
- Click OK.

Body Systems

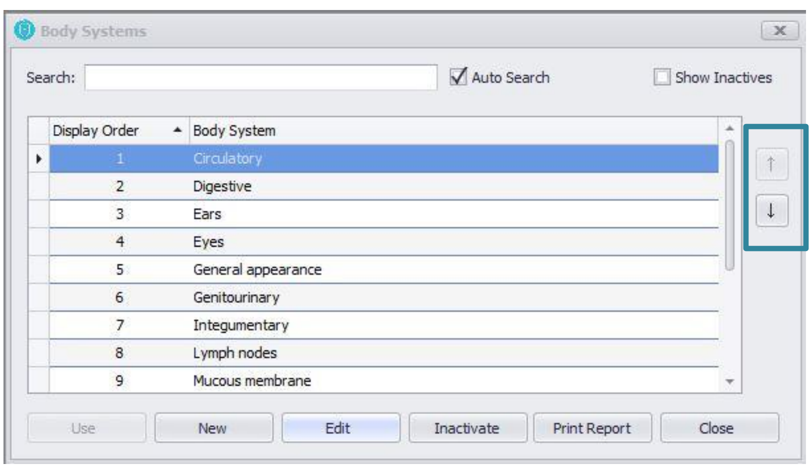
Enter Body Systems (eyes, ears, gastrointestinal, etc.) and set up subcategories, such as Cornea and Iris under "Eyes." You can choose whether or not to use these in each visit template that you create.

How to Create, Edit or Delete Body Systems

- From the IntraVet Menu Bar, select Setup | Visits | Body Systems.

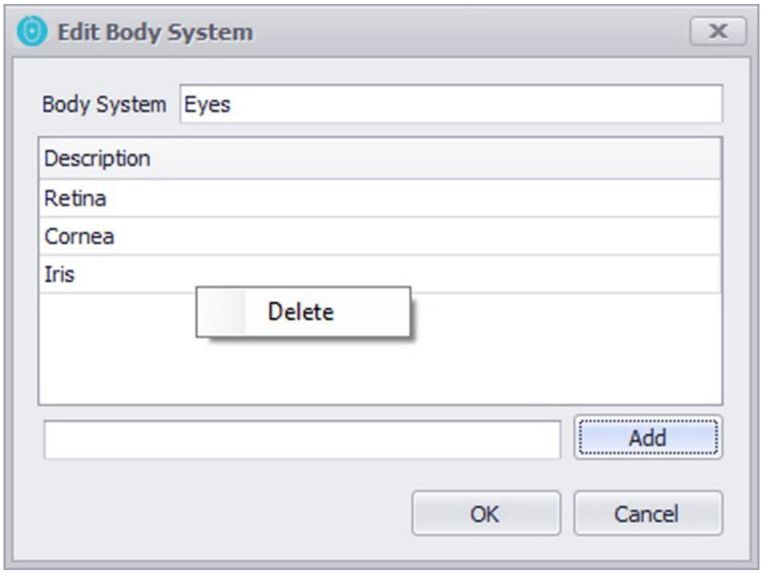


- The Body Systems screen will appear.
- Enter the Search field to locate a Description if the list is long and Auto Search is selected. You can also scroll through the list. To search inactive descriptions, click Show Inactives.
- Click New to create a new vital description.
- Click once on a Body System line item to select. Click Edit to change a description. Click Inactivate to inactivate a body system.



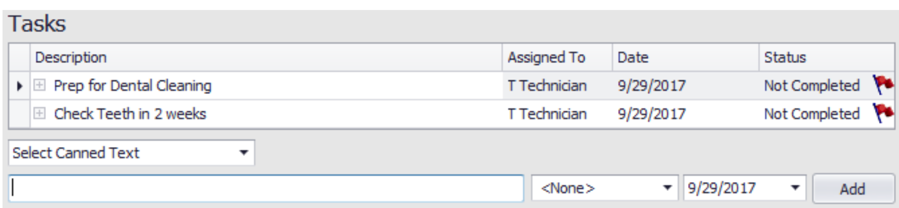
Use the Up and Down arrows to rank the Display Order of Body Systems.

- To add a description to the selected Body System, enter the blank field to the left of the Add button.
- To move the selection into the main pane, click the Add button to the right of the field.
- To remove an item, right-click on the line item and select Delete. There will not be a second warning.
- Click OK.



Tasks

Tasks can be created and associated with visit templates and/or free formed as needed. They can be assigned to particular users and marked as complete to track what needs to be done in an ongoing patient visit. See "How to Enter and Manage Tasks."



Working with Visits

Visit Templates can be added to appointments and/or Control Center entries upon scheduling or editing the appointment. The visits follow the process outlined below.

The appointment, reservation or drop-off is entered in the appointment calendar or Control Center. The type of template should be entered or selected at this time. The visit is then "scheduled." Services and notes can be added without checking in the patient.

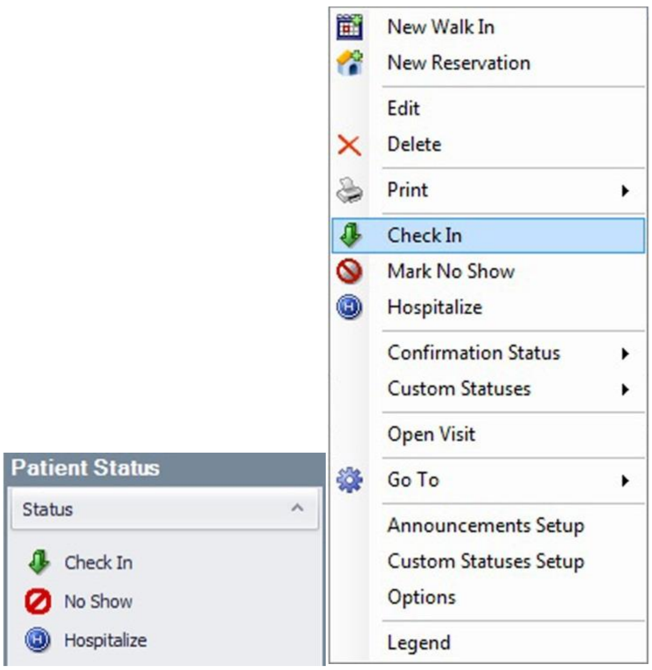
Refer to the Control Center chapter, Process the Check-in – Walk-in Emergency for additional information about checking in a walk-in emergency or a patient whose status is inactive.

Patient Visit Overview

When the patient arrives, begin the check-in process from the Control Center window.

- Double-click on a client/patient line to open the visit (if your default setting is set up this way). Review if you need to change client or patient information. This must be done from the Client Account screen. See Edit Client/Edit Patient.
- Review the Reminders/Recommendations and the Plan for services. Add information like weight or other services, if necessary.

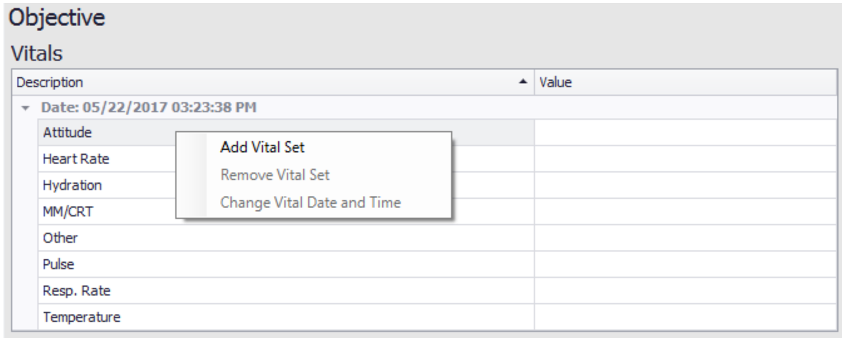
  The patient's weight can be revised at any time. In the case of a recording error, for example, a weight can be revised more than once in one day. The new weight does not overwrite the previous weight; both display in the window.
- Use Add/Remove to include or delete options as needed (Vitals, Weight, Assessments, etc.).
- When you are finished reviewing the visit, click Save.
- Choose Check In (green down-arrow) from the Patient Status section in the left column, or right-click on the client/patient line and set the status.



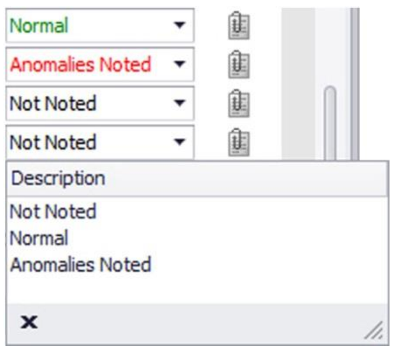
Once the patient is checked in, the charges can be finalized and the invoice created.

Patient Check-in

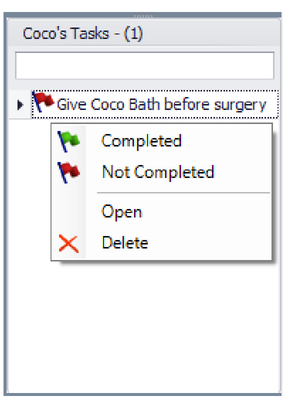
- Enter vitals, if needed. Right-click in the Vitals section and choose Add Vital Set for additional sets on the same or different day. Place the cursor in the right column, add the data and press the Tab key to move to the next vital.



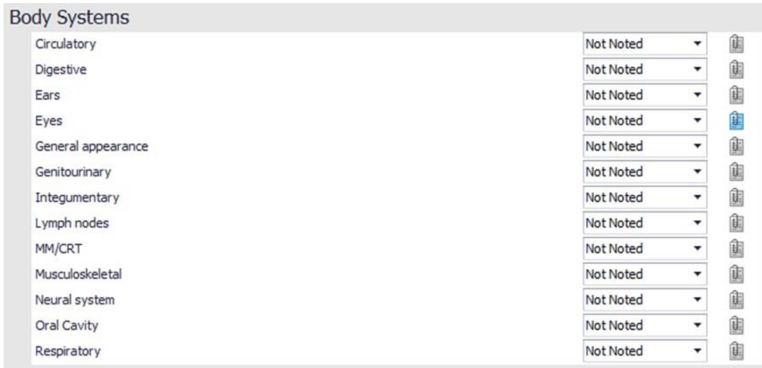
- Complete the Body Systems section, if used. There are three Body System subcategories: Normal displays green, Anomalies Noted displays red and Not Noted displays black.
- To change a subcategory, click in Normal; then, click to make a different selection. The pop-up will close once you have made your selection.



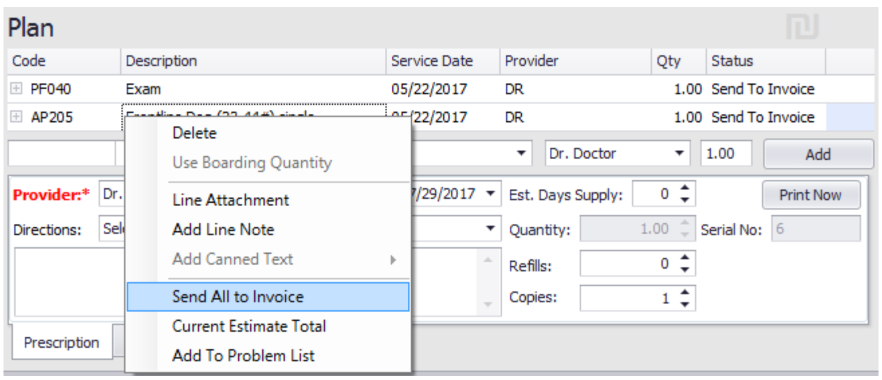
- Unlimited notes can be added. Click in the Notes section under To-Do Items and enter the text. When you are done, click Enter.
- To edit a note or delete a note, right-click on the note and select either Edit Note or Delete Note.



- To add documents or images to the patient, select the paper and paperclip icon at the end of the line; select New, and navigate to the location where the document or image is stored. The icon changes to blue when something is attached.
- Click once on the icon to access the attachment, and click View to open the file.



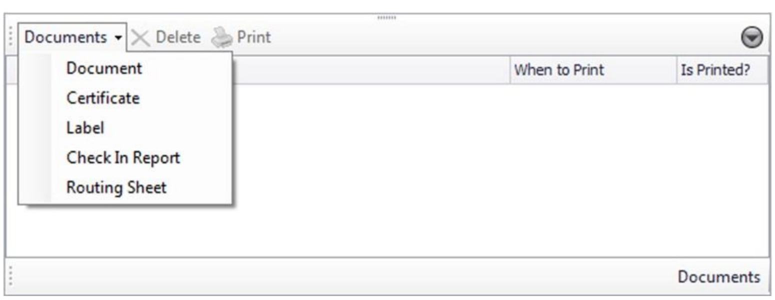
- When you have finished all additions, deletions and revisions, move to the Plan section. You can add, delete and edit treatment plan items. Prescriptions and Section Notes are added here as well.



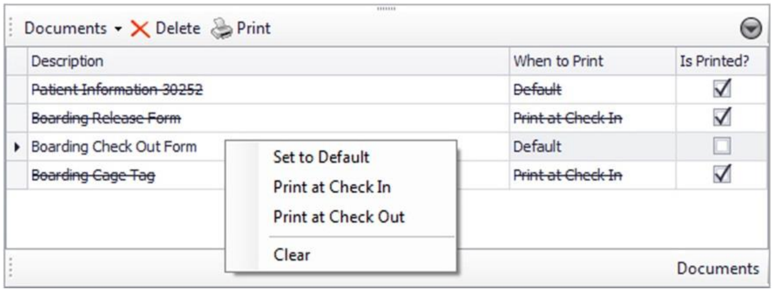
Print Documents

Documents are selected and printed from the visit as needed on the fly or automatically loaded as part of the Visit Template setup. Documents (Check-in Report, Certificates, Routing Sheets, etc.) can be set to print at check-in, check-out or printed on demand. We keep track of these documents and whether they were printed as part of the permanent medical record.

- In Control Center, select the client/patient to select.
- Click the Documents down-arrow to select the type of document.



- Right-click on the document to select when you want the document to print. Printed documents are marked out with a line through them and a check appears in a box in the Printed column. See above.

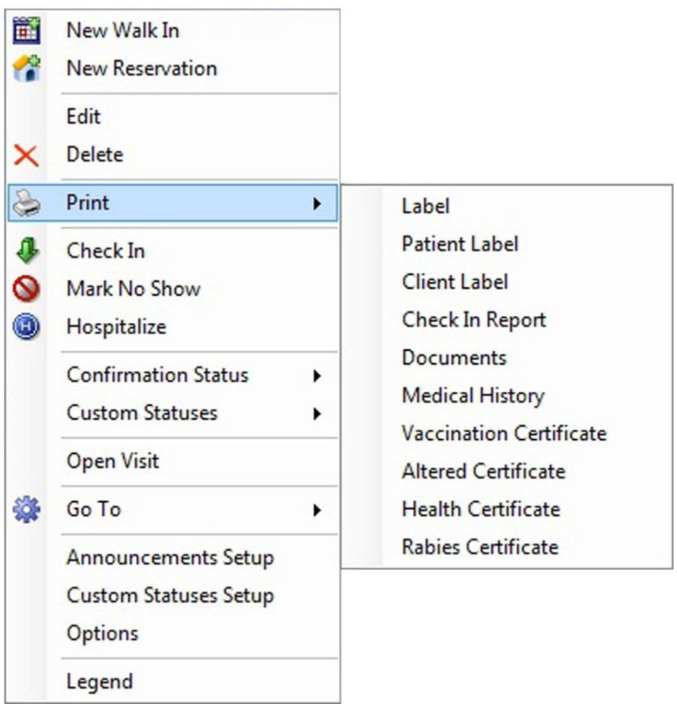


- Select Print to print one document right away.
- You can also quickly choose documents to print for a visit by highlighting the Visit line, clicking on the Printer drop-down list and selecting a document.

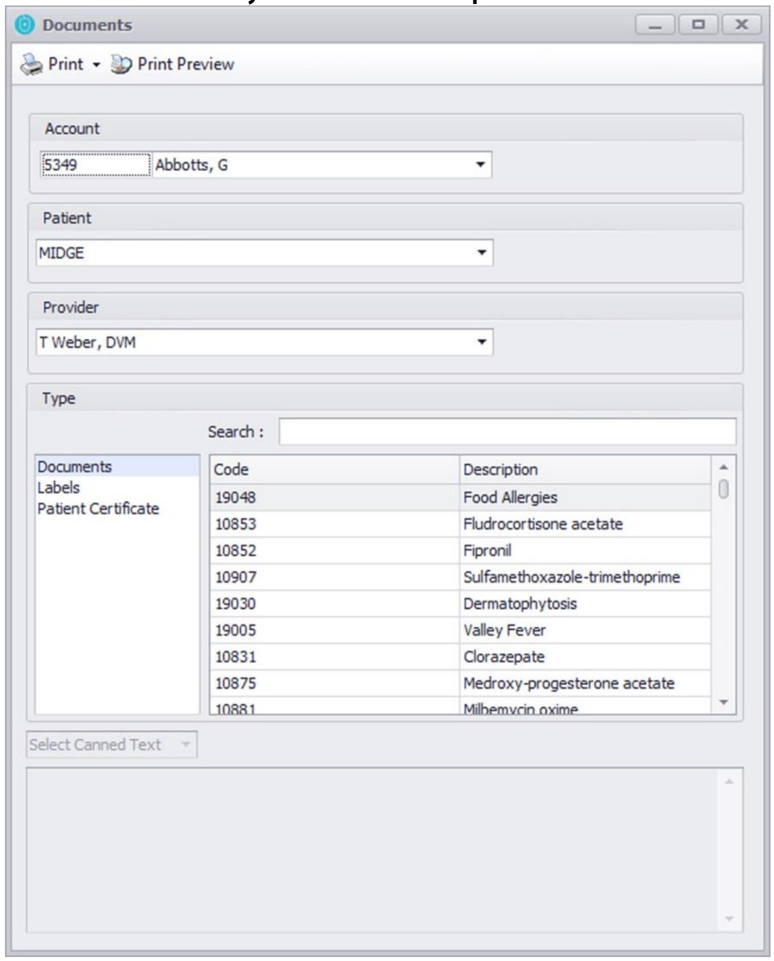
Print Multiple Copies of the Same Document

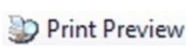
Sometimes more than one copy of a document or label is needed.

- To print multiple copies: From the Control Center, right-click on the client/patient line and go to Print | Document (or what it is you want printed).

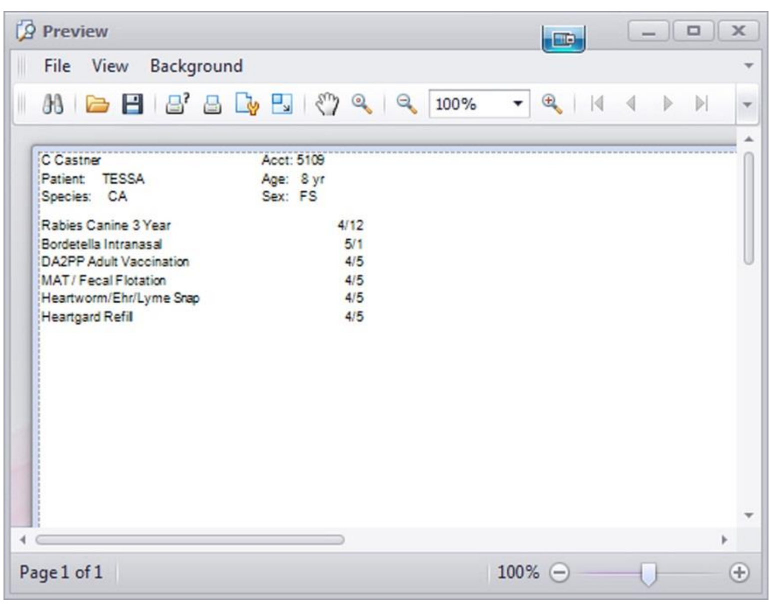


Highlight the Document or Certificate you would like to print and then Select Print Preview

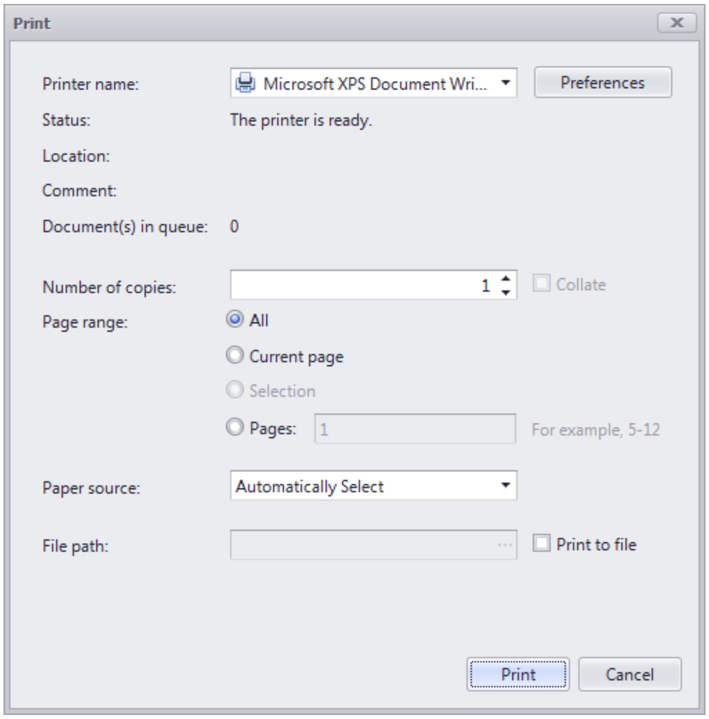




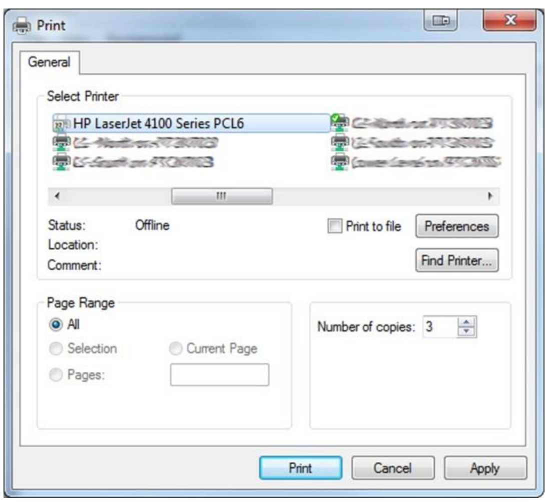
- Select the printer icon with the question mark .



- Choose the printer where you would like the document to print.



- Enter the Number of copies.
- Click Print.



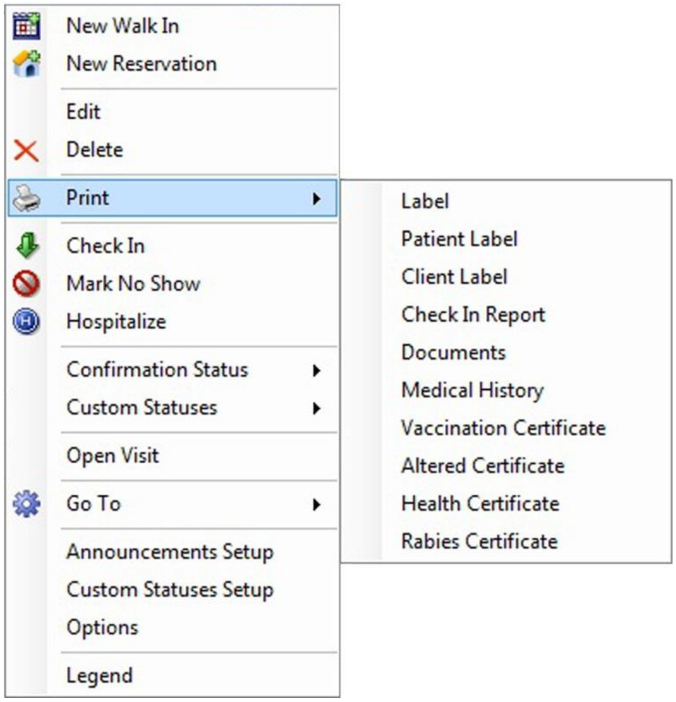
Print Altered Certificate

Some breeders and licensing agencies require proof of alteration of a pet's sex. You can print or reprint an Altered Certificate for a patient. If the patient's gender (as entered in the patient information) is not MN or FS the certificate will not print.

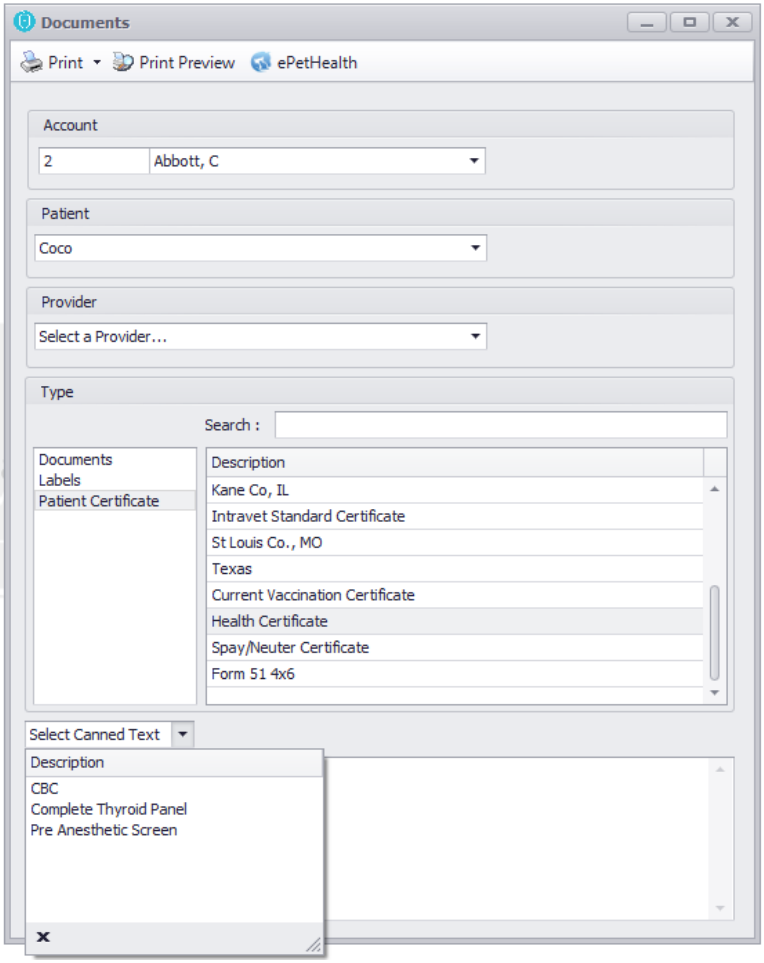
Patient Health Certificate

Some places require that a health certificate be provided when an animal is traveling. Notes relevant to a specific patient are entered individually.

* To enter canned text: From the Control Center, right-click on the client/patient line and go to Print | Health Certificate.

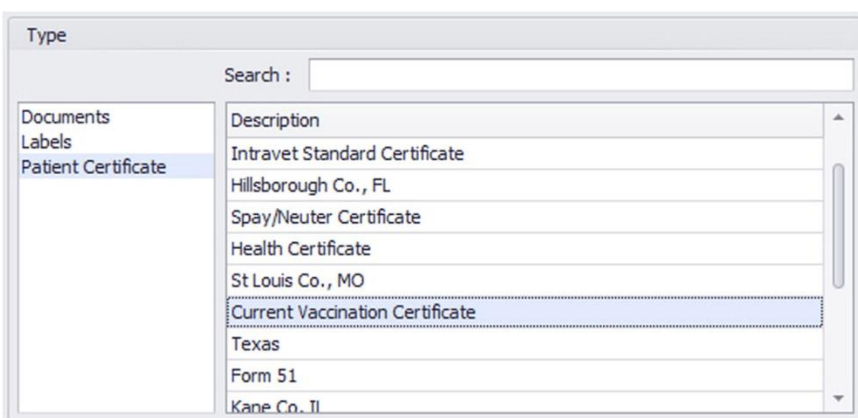


* Click the down-arrow next to Select Canned Text, or enter your own.



Rabies Certificate

A rabies certificate can be reprinted only if it was printed at the time of vaccination. If it was not printed previously, it will not reprint here. If you need a copy of a rabies certificate, print the current vaccination certificate; it will include the current rabies vaccination.



LifeLearn

LifeLearn, a companion software package that can be added to IntraVet, provides you with numerous client education printouts/handouts about conditions, diseases, and homecare

instruction. The printouts/handouts include small animal, large animal and pharmacy. To work with these documents, you need MS Word installed on your computer.

During LifeLearn installation, the printouts/handouts are automatically linked to some diagnosis codes. Other printouts/handouts can be manually linked. You can also manually link LifeLearn printouts/handouts to inventory and procedure codes.

Refer to the LifeLearn chapter for setup information.

Attach and Print Documents from Visit

Documents created outside of IntraVet can also be attached to a patient visit and printed.

Supported document format types are:

.DOC

.PDF

.RTF

.TXT

.XLS

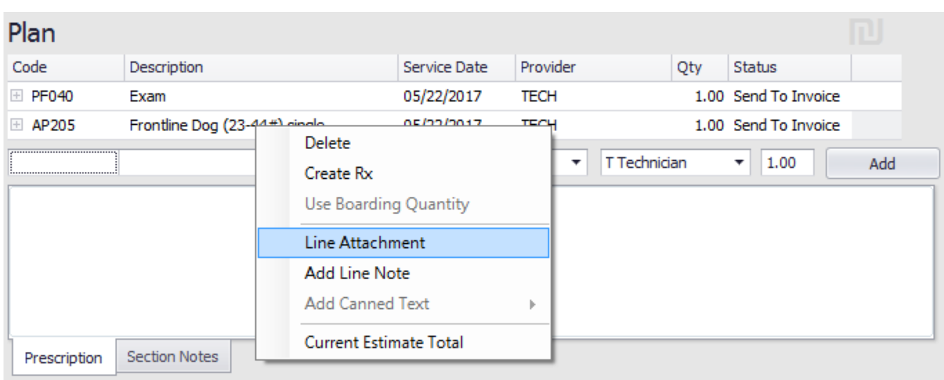
.JNT, JTP

. DCM – Provides the basic interface for viewing medical images, such as CT Scans, MRIs and Ultrasounds.

Attaching large files can significantly increase backup time and decrease storage space.

Documents are attached to the patient's medical record from the Control Center. Use the calendar to locate the day of the patient's visit.

- Double-click on the client/patient line to open the visit.
- Right-click on the Plan line where you want to attach a document.
- Choose Line Attachment from the pop-up menu. An Attached Files window opens.



- Select New and navigate to the location on your hard drive, floppy disk or CD where the document is stored and double-click Open to add the document.

When a document is attached to a Plan line, an attachment icon (page and paperclip ) will appear next to the line. Multiple documents can be attached to a Plan line.

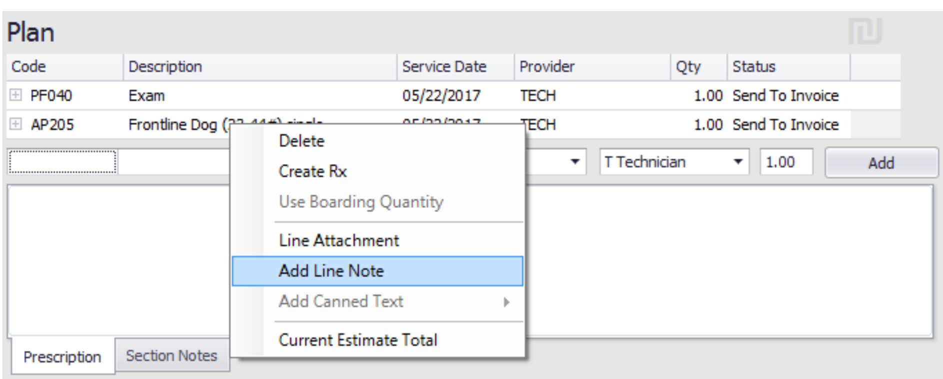
If the document's name needs to be changed, select Save as in the Attached Files screen's Menu Bar. Give the document a new name and click Save.

- To remove a document, select it and click Delete.
- To view a document, select View in the Menu Bar or double-click on the document title.
- If you make changes to a document, you can save it under a different name to preserve the original document or overwrite the original document.
- The patient's Visit window will display an attachment icon (page and paperclip) next to the visit date and at the end of each Plan line that has an attached document. See illustration in the step above.
- To view a comprehensive list of documents and images attached to a patient's visit, select Attachments in the Menu Bar. To view attachments for a specific plan, select the attachment icon on each Plan line.

Plan Section of the Visit

After the patient is checked in, you can make changes as services are completed.

- To add items to the patient Plan, either click Plan in the Navigation panel to jump to the Plan section, or scroll up/down the window.
- Double-click in a blank Plan line, and Enter the code or description of the item you want to add.
- Press the Enter key to accept the item and exit the line. Then click Add.
- To delete an item in a treatment plan, right-click on the line and select Delete.
- To add a line note, right-click on a plan line that displays a treatment, and select Add Line Note.



Loading Estimates into the Visit

Estimates or Estimate Templates can be directly loaded into the visit, either to a blank Plan section or an existing Plan section with line items. These can be added at any time before check-out.

- Open the Visit by double-clicking on the client/patient line in the Control Center.
- Click Estimate in the Visit Menu Bar.

Any existing estimates (pending or saved estimates), created for the patient, appear in the window with the estimate name, Net Min. Total and Net Ma. Total.

- Click Use to load. You may need to confirm each line as it is loaded in the plan, depending on your invoice settings; e.g., if you set up cost ranges or left the field blank, you must enter a definite cost.

If there are any prescriptions associated, the Prescription Label window will appear, ready to be completed.

- Select a Provider and determine the Expiration date.

There is an option in the Setup | Program | General Branch Setup under Invoice/Visit to autoload pending charges. If left unchecked, you must enter each separately.

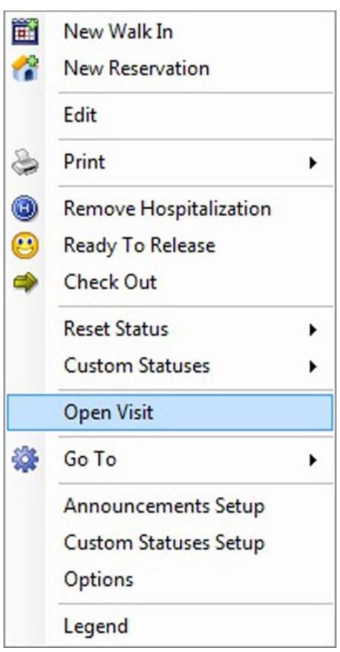
Invoicing the Visit

Invoicing the visit incorporates multiple areas within the Control Center. You will have the option to enter SOAP information, enter plan lines, lab results etc.

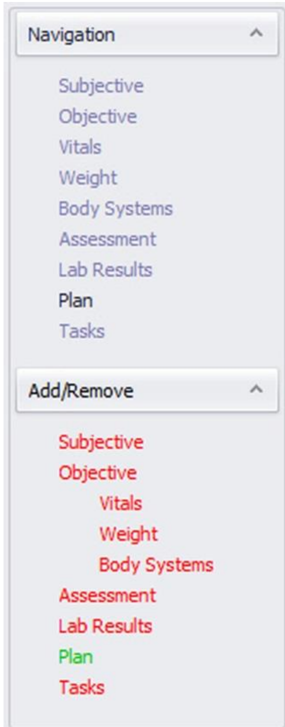
Below is an example of what the work flow should look like.

Entering SOAP details

- To open, select the Control Center icon located in the IntraVet Menu Bar.
- Select a date on the calendar.
- Double-click in the client/patient line or right-click in the client/patient line and select Open Visit.



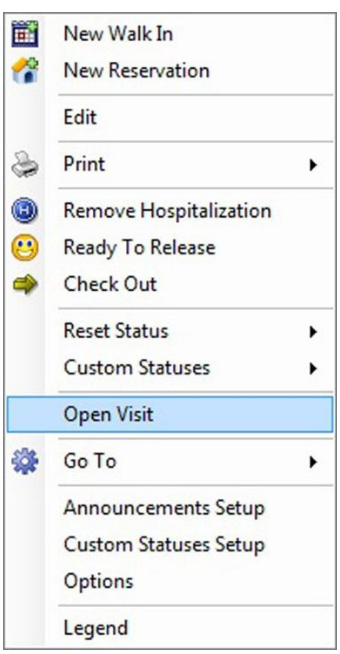
- While the Visit is open, you can still make changes, add or remove sections like Body Systems, Weight, etc. by selecting from the Navigation panel.



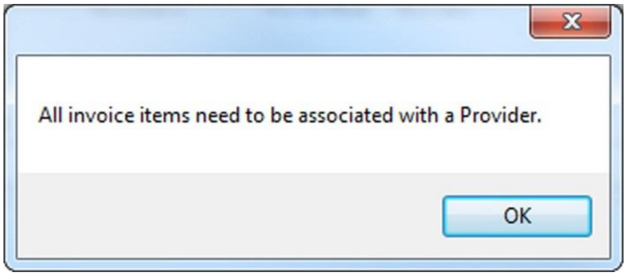
Invoicing the plan items

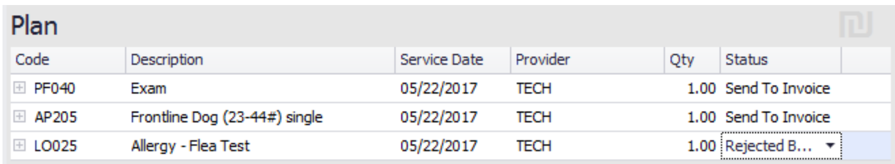
Plan line entries need to be finalized before entering the pre-invoice phase.

- To open, select the Control Center icon located in the IntraVet Menu Bar.
- Select a date on the calendar.
- Right-click on the client/patient line and select Open Visit, click plan in the add/remove section on the left side of the screen to enter your plan/invoice items. You also have the option to set the Plan items to Send to Invoice, Done Elsewhere, Rejected, or Deferred.



If a Provider has not been selected, you will see the following message:




Plan

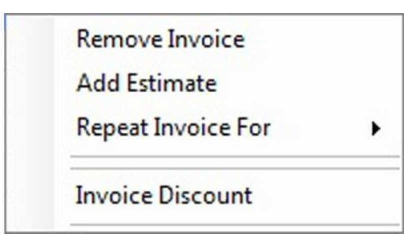
Code	Description	Service Date	Provider	Qty	Status
PF040	Exam	05/22/2017	TECH	1.00	Send To Invoice
AP205	Frontline Dog (23-44#) single	05/22/2017	TECH	1.00	Send To Invoice
LO025	Allergy - Flea Test	05/22/2017	TECH	1.00	Rejected B...

Rejecting Treatments – This is used, for example, when more than one test is ordered, but one test result may eliminate the need for additional testing.

- **Then select the Ready to Invoice button in the upper left corner of the Visit screen.**
- **Click Save. The window will close.**
- **Right-click on the client/patient line and select Check out, which will automatically open Invoice and pull in your planned items.**
- The client name is at the top of the window, and the total (Net Invoice) for the selected patient's visit appears at the bottom right of the window.
- **There is a blue bar that displays the Patient Name and the Patient Total for that invoice on the selected Invoice Date. Below you can scroll to review the invoice information.**

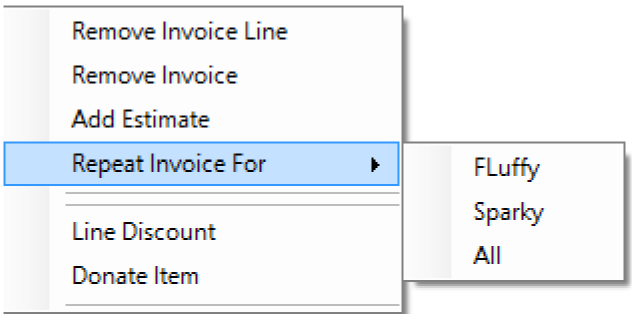
Right-click on the blue bar for the following options:

- **Remove the Invoice**
- **Add Estimate**
- **Repeat Invoice for (if there are multiple pets on the account)**
- **Invoice Discount**



- **If you right-click on a line item you can choose from the following:**
- **Remove Invoice Line**
- **Remove Invoice**
- **Add Estimate**
- **Add Line Note**
- **Repeat Invoice For (A list of their other patients is provided)**

- Show Code Prompt
- Create Rx Label (This only appears if the line selected is for a prescription)
- Line Discount
- Donate Item



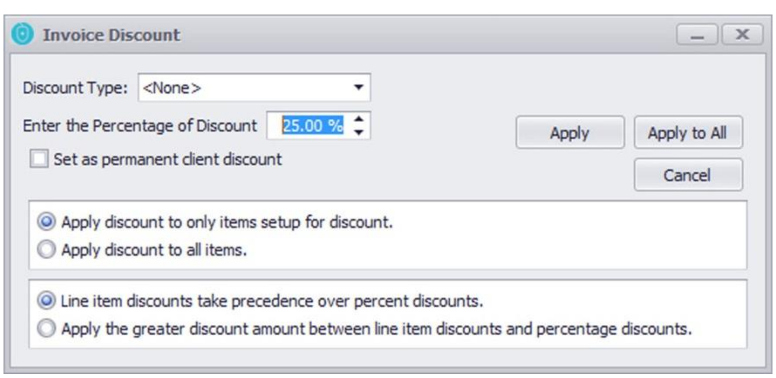
In this window you can enter discount and payment information. For payments, see Transactions.

Add an Invoice Discount

There are two methods to apply a Discount.

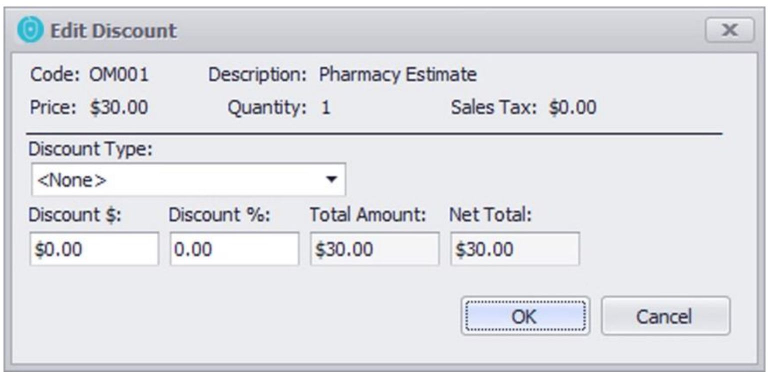
Method 1:

- Click the Invoice Discount button at the bottom of the screen.
- Select the Discount Type (optional).
- Enter the Percentage of Discount.
- Check the box Set as permanent client discount, if appropriate.
- Select the appropriate discount options:
  - Apply discount to only items set up for discount.
  - Apply discount to all items.
  - Line item discounts take precedence over percent discounts.
  - Apply greater discount amount between line item discounts and percentage discounts.
- Click Apply, Apply to All or Cancel.



Method 2:

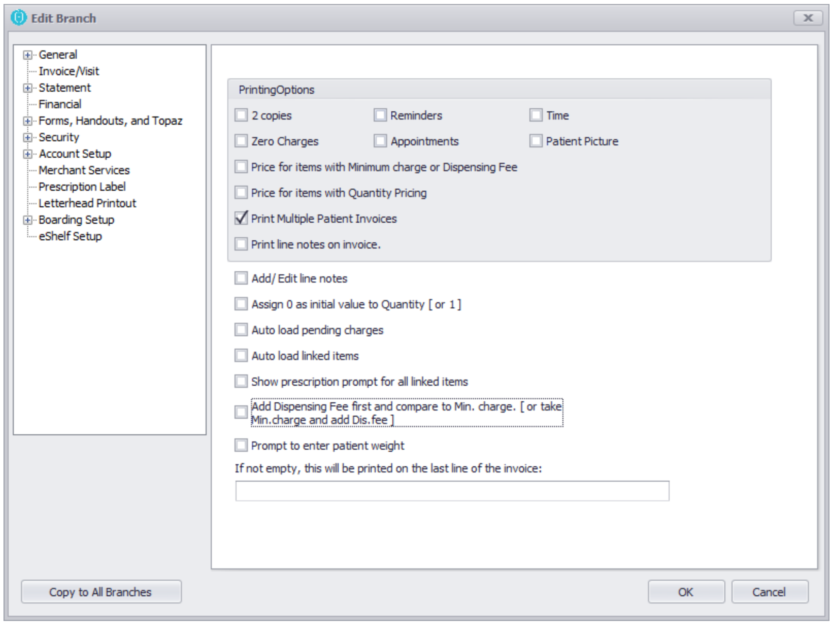
- Click once to highlight a line item. Right-click on the line item and choose Line Discount.
- Select the Discount Type (optional).
- Enter the Discount $ amount. The remaining fields will auto-fill, or
- Enter the Discount % amount. The remaining fields will auto-fill.
- Click OK. This discount will only affect this line item.



- Click Save in the lower right corner of the screen. The save and print window has four options:
- You can continue adding, deleting and verifying codes as part of the invoice, and then choose one of the following Save options:
  - Permanent – Print: The invoice is complete and ready to be closed out (nothing will be added). The customer wants a receipt, certificates, patient information sheets and/or patient forms. When the invoice is permanently saved, it changes the status of the visit in the Control Center to Checked Out.
  - Permanent – No Print: The invoice is complete and ready to be closed out (nothing will be added). The customer does not want a receipt or certificate.
  - Temporary – Print: This option allows you to save the invoice but not any payments made because the patient's treatment plan is not finished (additional items can be added later). A temporarily saved pre-invoice is typically not printed. However, sometimes the client wants a copy of the day's charges.
  - Temporary – No Print: This option allows you to save the invoice but not any payments made because the patient's treatment plan is not finished, and the invoice does not print (additional items can be added later).
  - Cancel – Returns you to the Invoice without printing.

You can set an invoice to print multiple patients on the same page or one page per patient. Depending on your default setup selections, invoices may print with single or multiple pets per page.

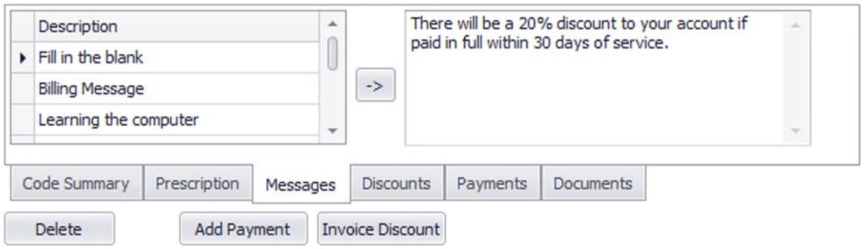
- From the IntraVet Menu Bar, select the Setup | Program | General Branch Setup.
- Select a Branch. Select Invoice/Visit in the left pane.
- In the Printing Options section, check Print Multiple Patient Invoices. This feature is optional.



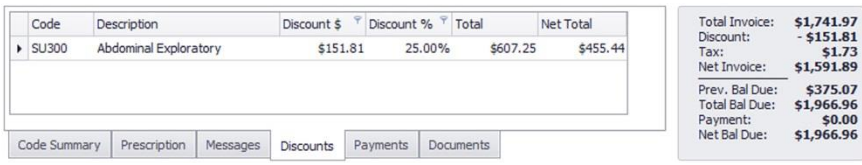
Information Tabs on the Invoice

The invoice has information tabs along the lower portion of the window available for quick reference:

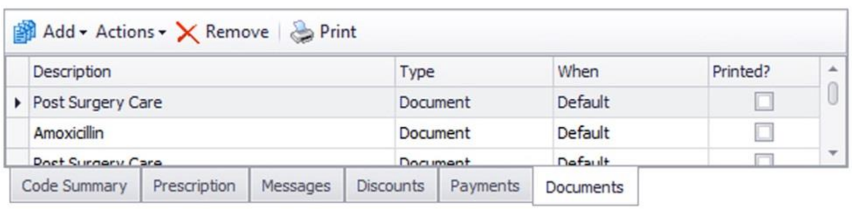
- Code Summary – displays information regarding the highlighted code.
- Prescription – prescription label details of the highlighted code.
- Messages – add an invoice message (freeform or from templates).
  - To access a message template, scroll the Descriptions on the left. Click once to highlight. Click the -> to the right to move the message to the message pane.
  - You can edit this message by double-clicking on a single word or clicking and dragging the mouse pointer over any portion of the message, right-clicking and choosing Delete. For example, you might want to add the patient's name to the message.
  - You can choose more than one message to appear on an invoice.
  - You can also create a message on-the-fly. Single-click in the blank field. Type your message.
  - Click Save in the lower right corner of the invoice window when you are done.



- Discounts – all discounts, whether by amount or percent, applied to the invoice.



- Payments – shows payments made on this invoice.
- Documents – a list of documents printed or set to print for the visit. You may also add new prints from here.



Split Invoicing

Owner Partnerships

There are two ownership conditions that require split invoices:

- Caretaker client – not financially responsible for the patient. All medical and financial history is part of the caretaker client's account.
- Partnership – financial responsibility is shared among multiple owners. Ownership percentages are set up in either the caretaker client or full partner's account.

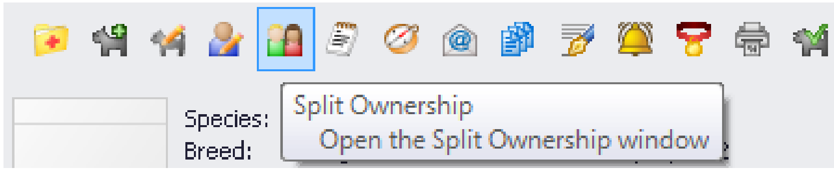
The caretaker client and patient must be entered into the system as well as all the owners (financially responsible clients) before entering the partnership setup.

To Enter Partnership Information

- Use one of the three methods described under the Invoice chapter and open a client account.

If this is a new client, these steps can be performed at the time the new client account is established (typically, when scheduling an appointment).

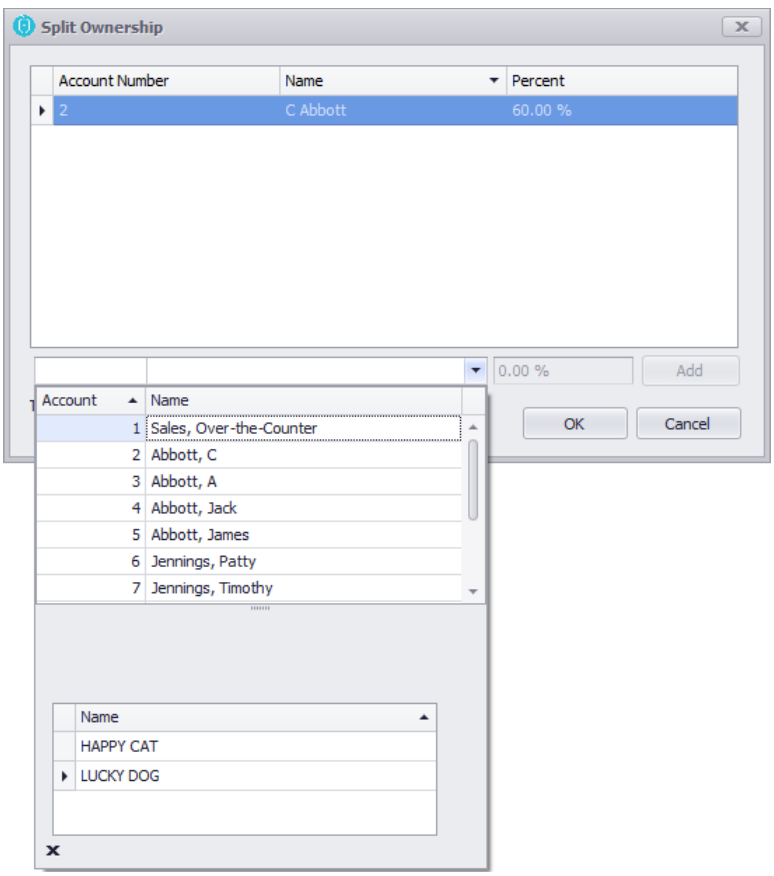
- Select the Split Ownership icon.

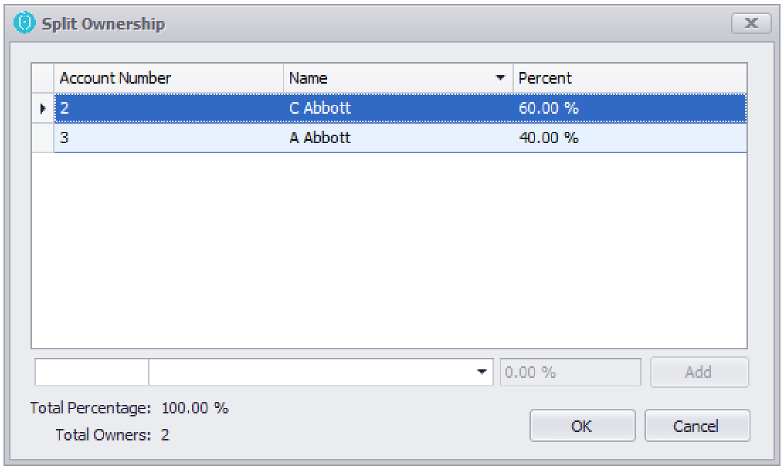


- Type the first few letters of a partner's last name into the second blank field. If necessary, scroll to the partner's name and double-click on the name to enter it into the fields, or click the down-arrow to activate a client list.
- Enter the percentage of ownership for this partner.
- A percentage must be entered before you Add the client to the Split Ownership screen. Repeat the steps above until all owners have been added and the percentage totals 100%.

To change a partner's percentage, double-click on the partner's name; change the percentage and click Add.

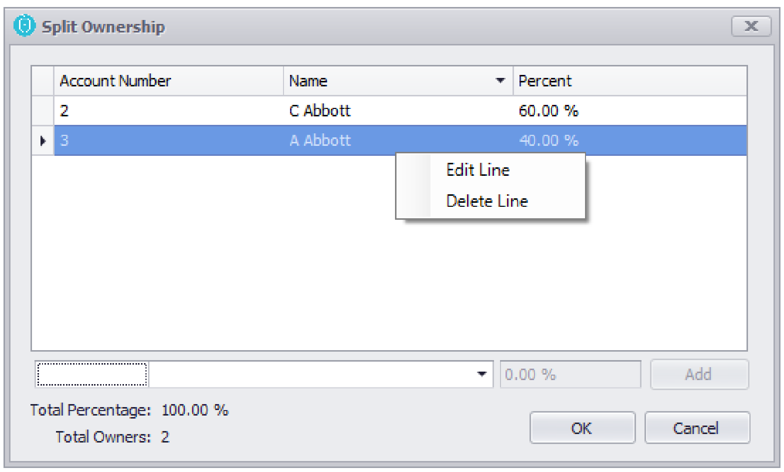
- When complete, click OK.



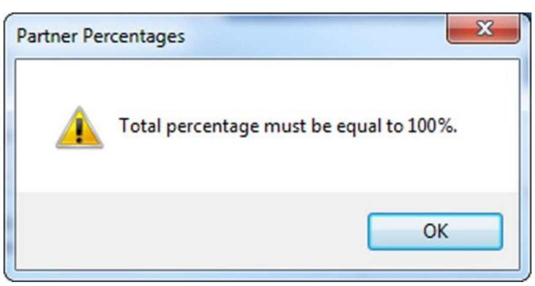


Removing a Partner

- **To remove a partner, follow the steps above To Enter Partnership Information.**
- **Right-click on the line of the partner to be removed, and select Delete Line.**



- **If you click OK before having a total percentage of 100% a warning will appear.**



- **If you press Cancel without saving the data, your changes will need to be re-entered.**

Splitting an Invoice

The caretaker client who is not a financially responsible partner does not owe any money for services provided. However, the patient's medical records are kept under this account name and the invoice details can be displayed/reprinted from this client's account.

When an invoice is saved for a patient with multiple owners, IntraVet:

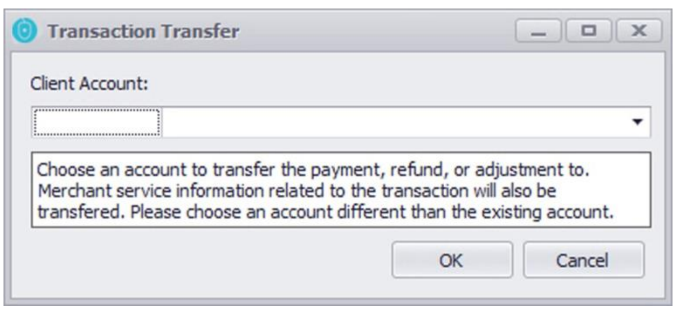
- Creates a credit adjustment of the same amount to cancel out the charges in full. This credit transaction is called a Split Invoice Adjustment.
- Distributes the invoice amount amongst the partner/owners according to the established partnership percentages. These charges are recorded in their accounts as debit transactions with the animal's name as the transaction description.

If the client is also a partner/owner rather than a caretaker client, there will be three transactions to handle the invoice and split invoicing:

- The invoice itself,
- A credit to cancel out the full charges of the invoice, and
- A debit transaction for the amount that the owner actually owes according to the partner percentage.

Deletions and Split Invoicing Deleting a Debit/Credit

Debit or credit transactions resulting from split invoicing cannot be deleted individually. The invoice on the caretaker client's account must be deleted instead. When the original invoice is deleted, any related debit/credit transactions are also deleted from partner accounts.



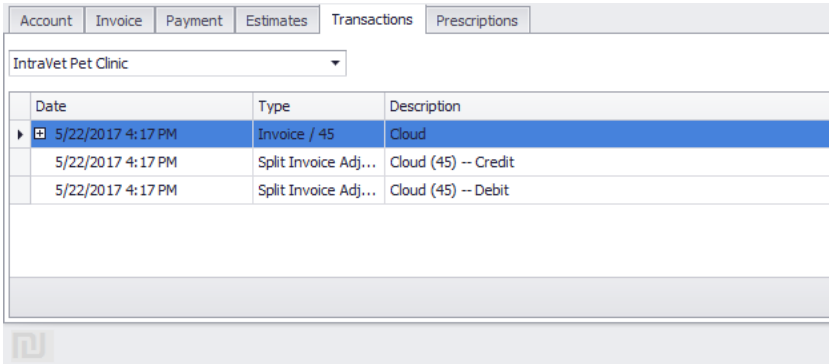
Transactions

Transactions – displays all the financial history for all patients associated with one client or a group of partners.

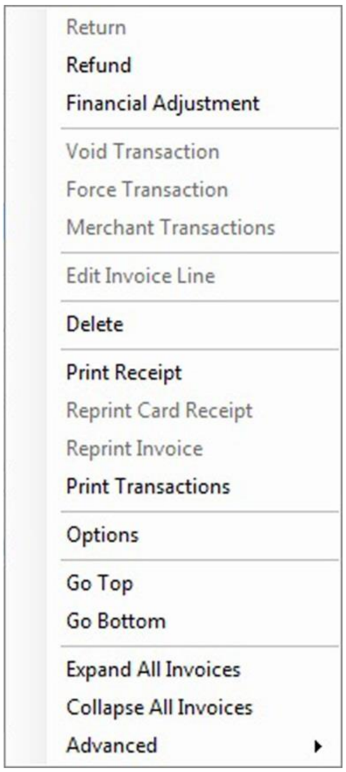
Working with Transactions

To open a client's Transactions window, you first need to open the client's account.

- Locate and open the client account.
- Select the Transactions tab.
- There are several actions that can be performed from the Transactions window. For example, select the + (plus) sign at the beginning of a line item to expand for more detailed information. Click again to collapse the section.



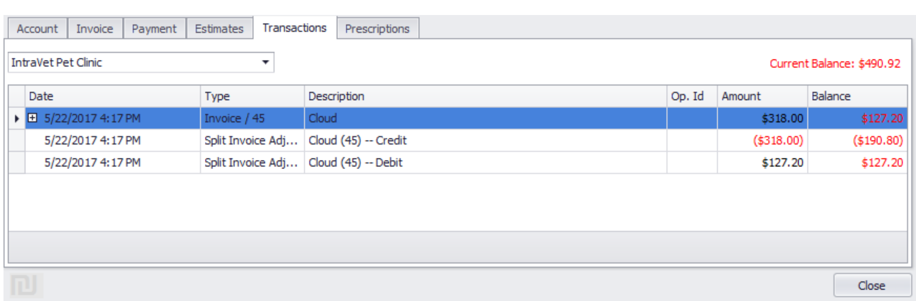
- Right-click on a patient name or line item to display the Transactions option list. Some options may require your Operator ID and password.



Payment transactions are processed through the Transactions screen.

To open/view a client's Transactions screen, first open the client's account.

- Open the client account.
- Select the Transactions tab. All the transactions for this client are displayed here.

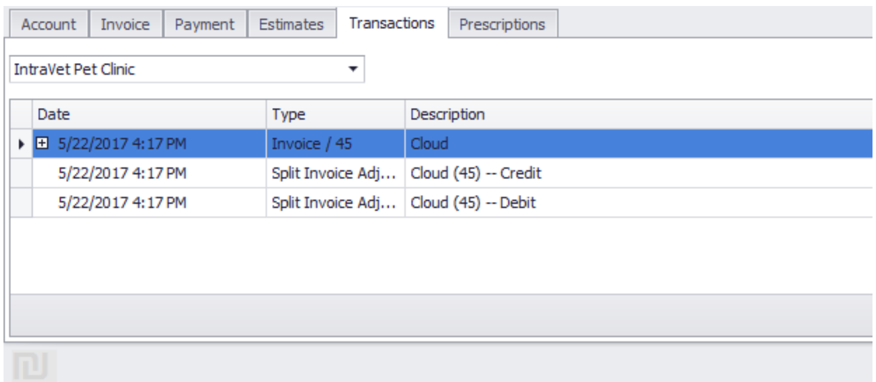


Edit a Permanently Saved Invoice Line

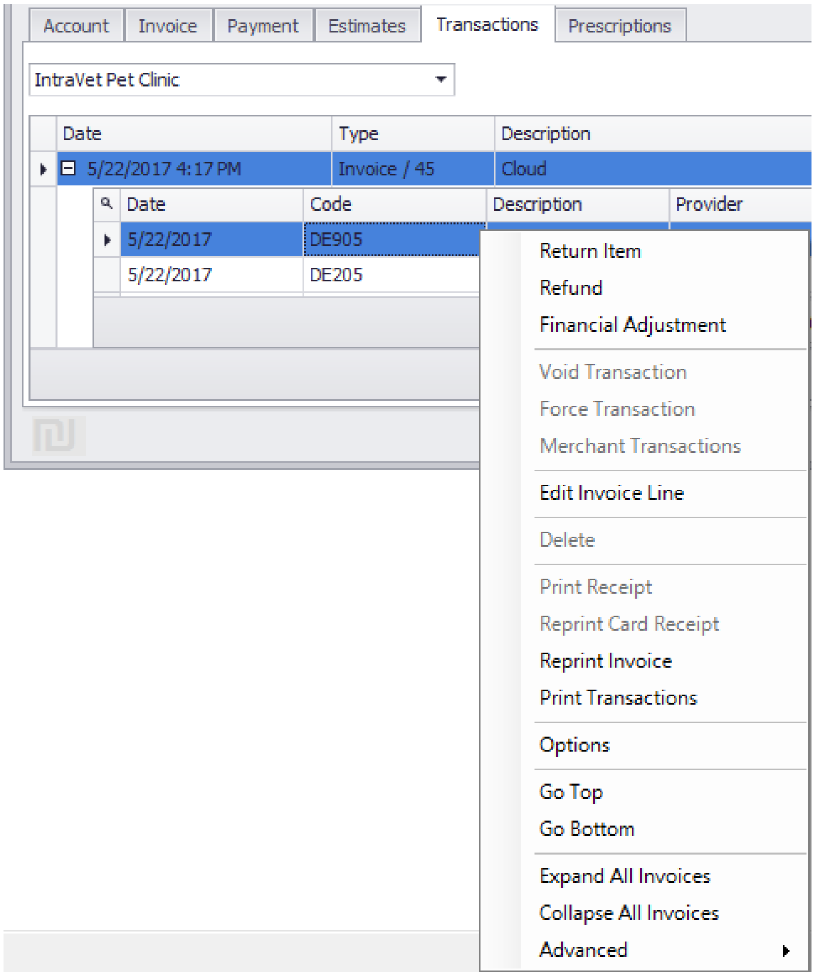
If you realize you made a mistake entering the doctor code on an invoice after it is saved, you can edit the invoice line item. Once an accounting period is locked, you cannot make any changes to the doctor code during that period.

To open a client's Transactions window, you first need to open the client's account.

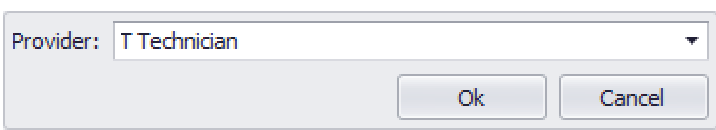
- Locate and open the client account.
- Select the Transactions tab.
- Click on the + (plus) sign at the beginning of a line item to expand for more detailed information.



- Right-click on the invoice line item you need to change and select Edit Invoice Line.



- Click the down-arrow in the Provider field to select a new provider.
- Click OK. The line in the Transactions window now displays the provider change.



Credit Adjustments

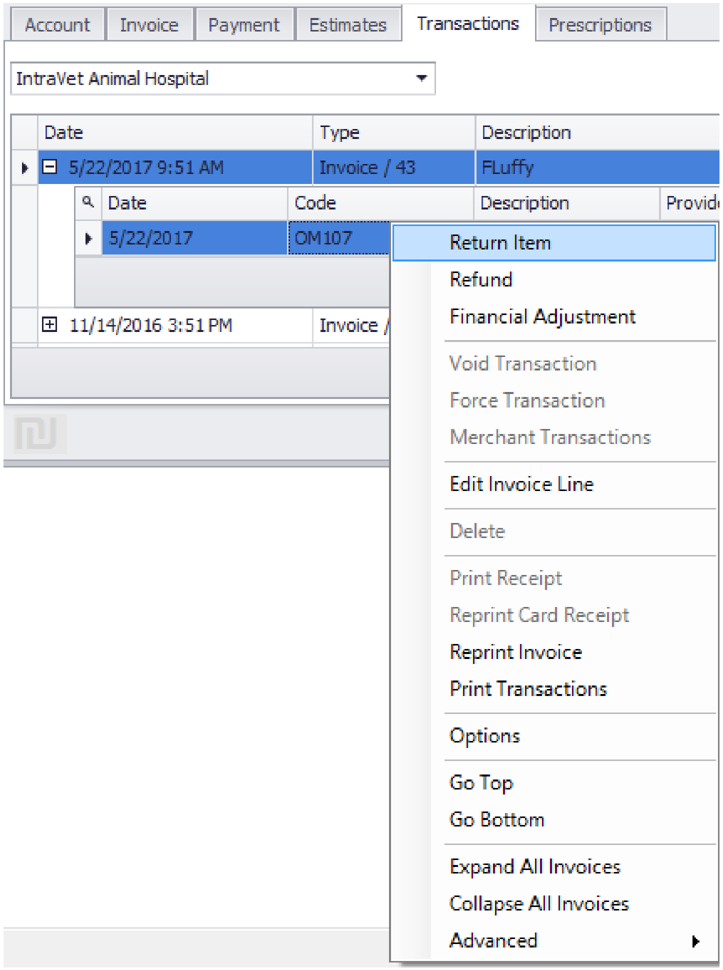
Credits decrease the client's balance. They are generally used to write off balances for various reasons or to offset mistakes.

Credit Adjustment – Return

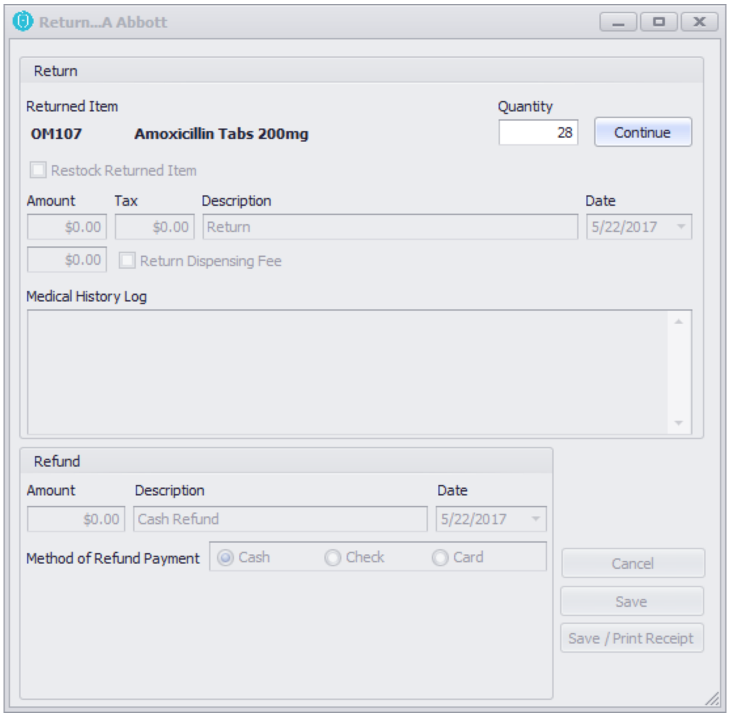
There are times when a practice or hospital will accept a return, such as a bag of unopened pet food or unused supplies. If your facility accepts returns, you will need to open the client's Transactions window to process the return. You first need to open the client's account.

- Open the client account.
- Select the Transactions tab.
- Select the + (plus) sign at the beginning of a line item to expand for more detailed information.

- **Right-click on the item being returned and select Return Item.**



- **The Returned Item displays grayed-out until the Quantity is entered and you click Continue.**



- Check Restock Returned Item if the item will be placed back into inventory. If checked, the Restock Returned Item will update the inventory count.
- Enter a brief reason for the return in Description and change the date, if necessary.

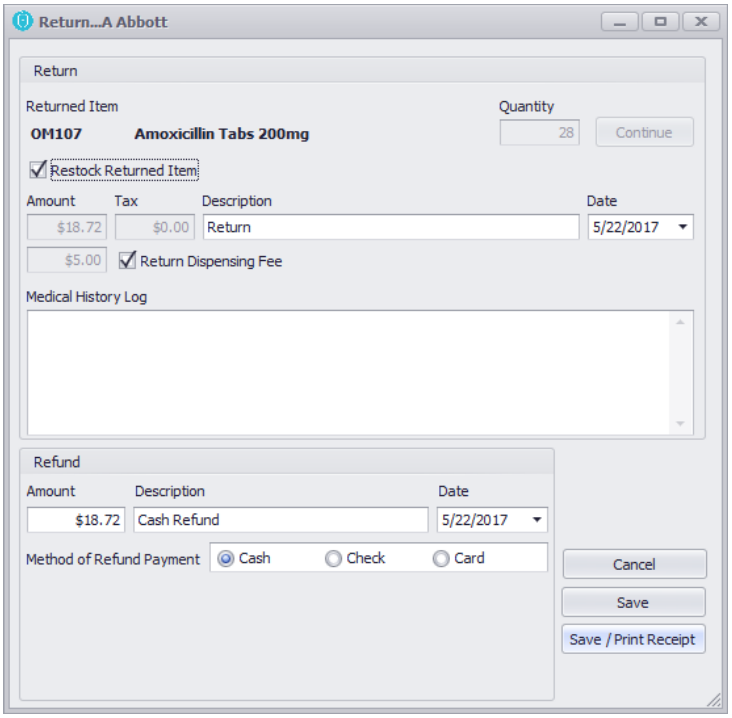
There is a 20-character limit in both Description fields. Letters, numbers, spaces and punctuation are included in the character count.

If you need to record more than what fits in a Description field or want to keep other notes, use the Medical History Log.

- The default date is today's Date. Backdate, if necessary.
- In the Refund portion of the window, the Amount is calculated based on the number of items being returned and their cost. Enter an amount unless the amount was auto-calculated. If the client requests an account credit, enter zero (0) in the Amount field.

Enter a brief Description (optional). For security reasons, it is recommended that you not use the Description field to record the card number.

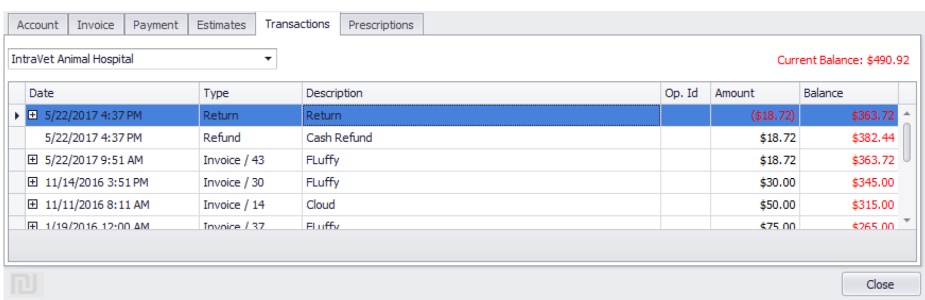
- Select Method of Payment, Cash, Check, or Charge.
- Click Save or Save / Print Receipt if the client asks for a receipt or you want to store a paper copy in the client's file.



Credit Adjustment – Refund

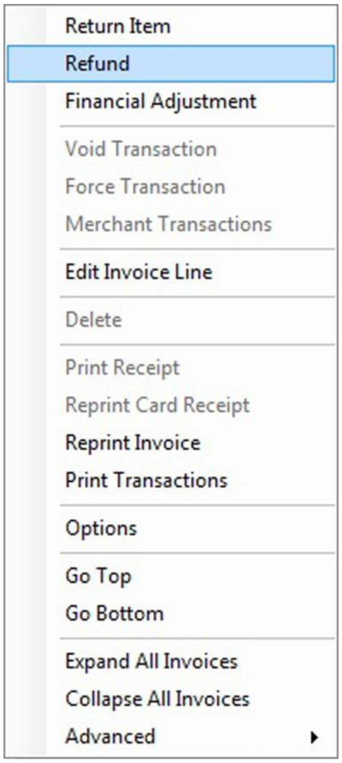
There are times when a practice will accept a return, such as a bag of unopened pet food or unused supplies. If your facility accepts returns and reimburses the client, you will need to open the client's Transactions window to process the refund. You first need to open the client's account.

- Locate and open the client account.
- Select the Transactions tab.



If you are issuing a refund that is not associated with an invoice:

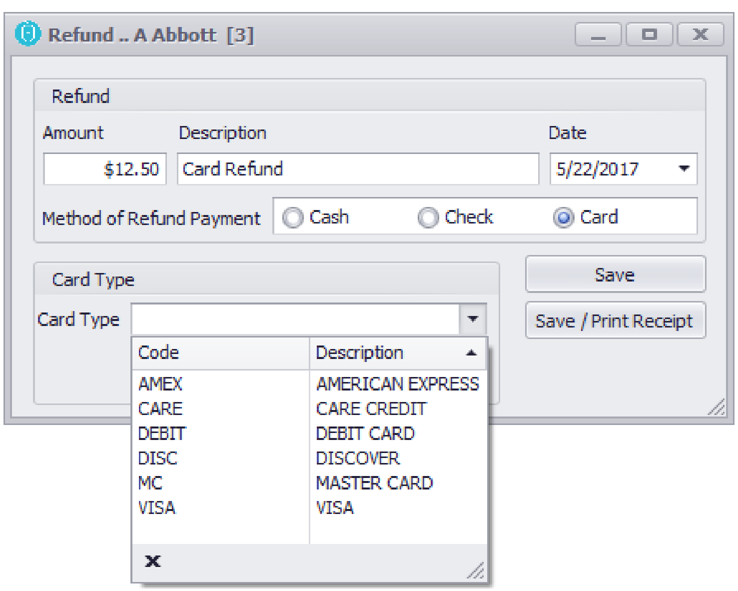
- Right-click on a line item to display the Transactions option list and select Refund.



- Enter the refund Amount.
- Enter the refund Date if different than the current date.
- Select the Method of Refund Payment (Cash, Check or Card).

For security reasons, it is recommended that you not use the Description field to record the card number.

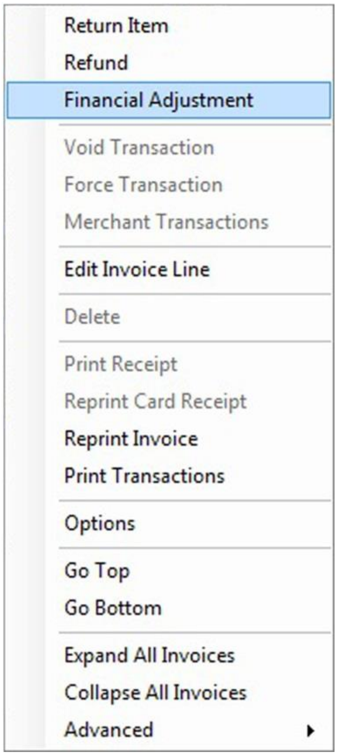
- If it is a Card refund, select the Card Type.
- Click Save or Save / Print Receipt if the client asks for a receipt or you want to store a paper copy in the client's file.



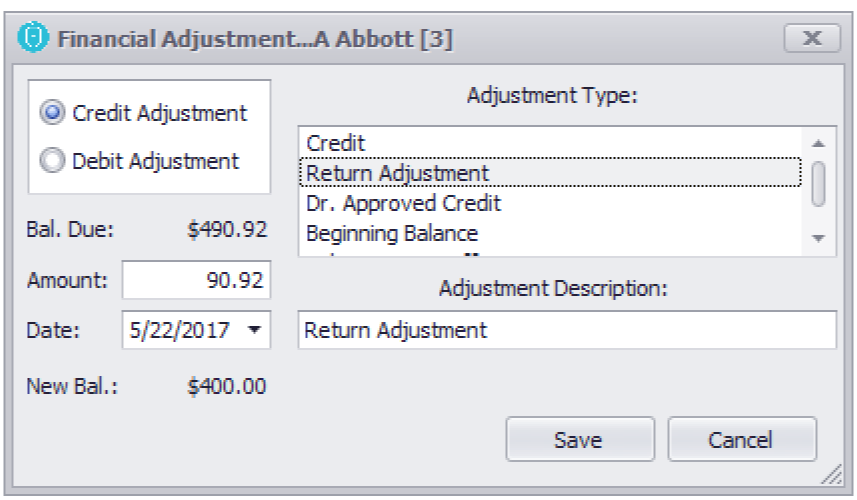
The amount refunded is added to the client's balance due.

To offset the client balance added by the refund after saving the Refund Procedure:

- Right-click in the Transactions window and select Financial Adjustment.



- Click the Credit Adjustment radio button. A list of Adjustment Types appears.
- Enter the Amount you refunded the client.
- Enter the Date of the refund if different than current date.
- Select Return Adjustment for the Adjustment Type.
- Click Save.

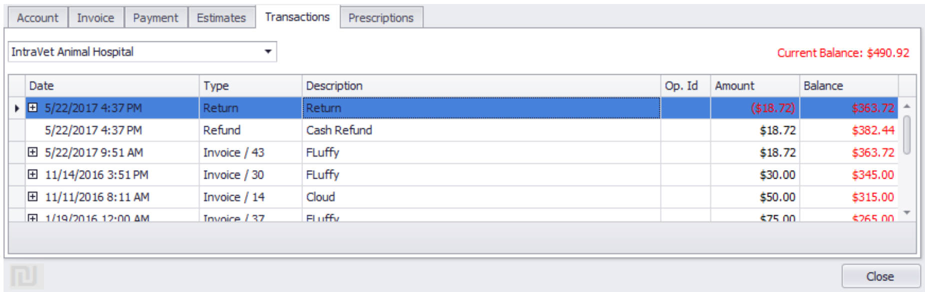


- The client New Balance reflects that you have refunded the money.

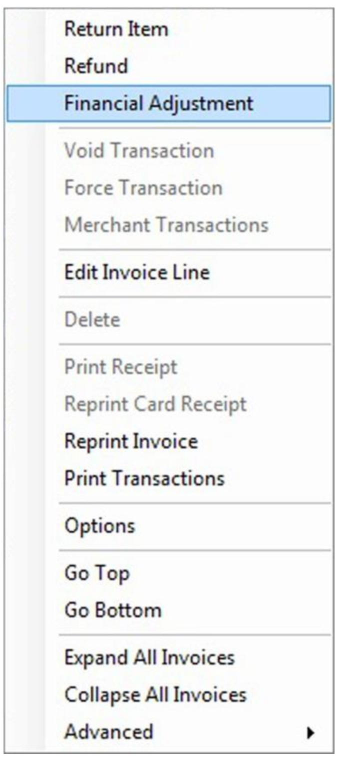
Credit Adjustment – Non-Sufficient Funds (NSF) Checks

To open a client's Transactions window, you first need to open the client's account.

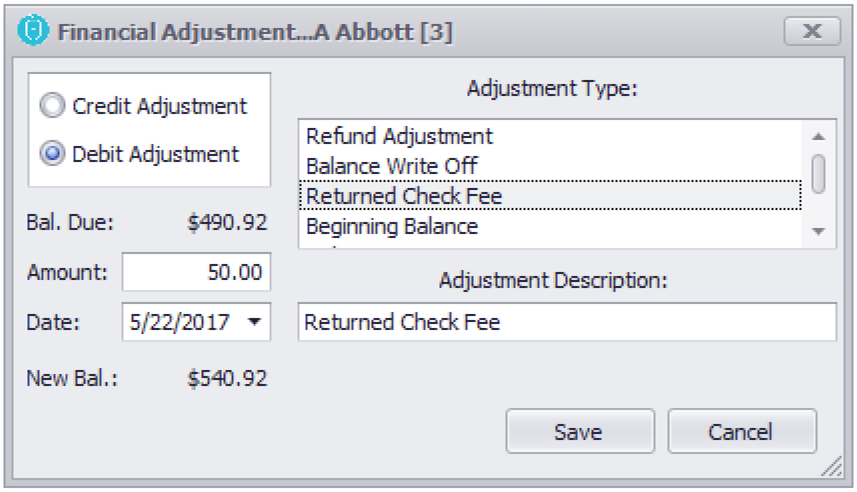
- **Open the client account.**
- **Select the Transactions tab.**



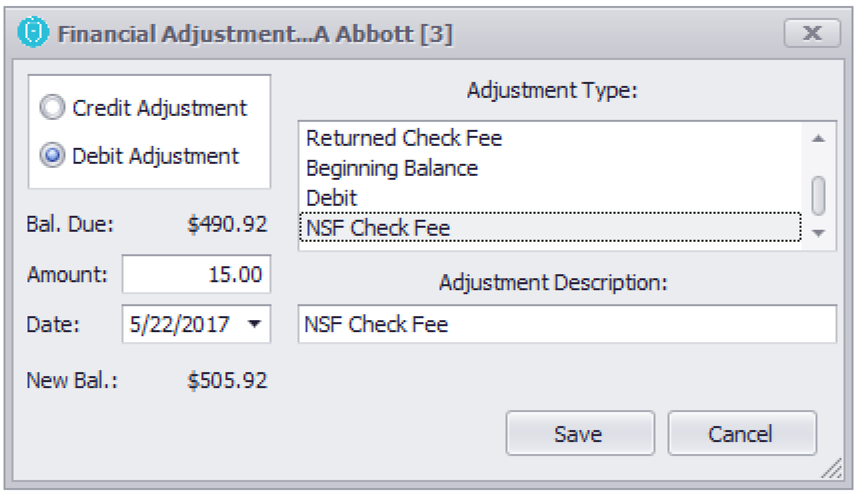
- **Right-click on a line item to display the Transactions option list and select Financial Adjustment.**



- **Select Debit Adjustment and fill in the remaining fields.**
  - **Amount of the original check**
  - **Date**
  - **Adjustment Type – select Returned Check**
  - **Adjustment Description**
- **Click Save or Save/Print Receipt.**



- Repeat the steps above to create the adjustment to apply the NSF Fee to the account. Under Adjustment Type, select NSF Check Fee.



The returned check fee that your practice may assess the client is handled in Debit Adjustments.

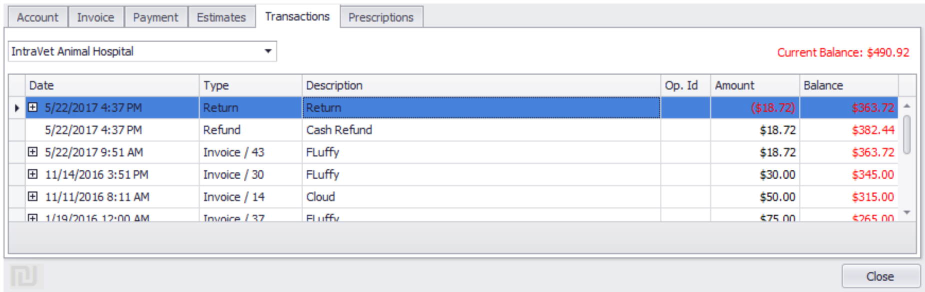
Returned Check Adjustments will show on the doctor's payment distribution report as "paid," and the amount of the adjustment taken will be undistributed.

Debit Adjustments

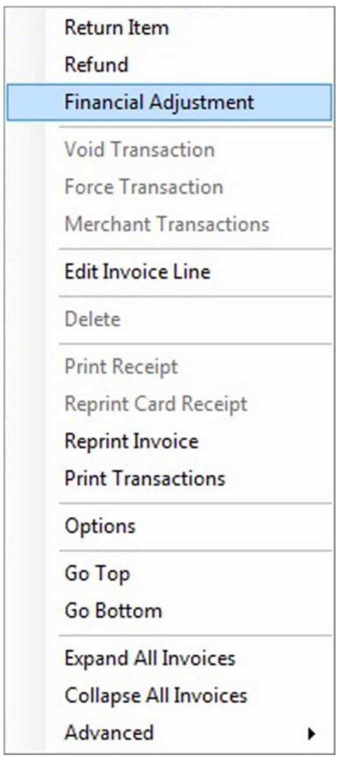
Debits increase the client's balance. They are generally used to assess fees not related to regular services (NSF fees, collection fees) or to offset errors.

To open a client's Transactions window, you first need to open the client's account.

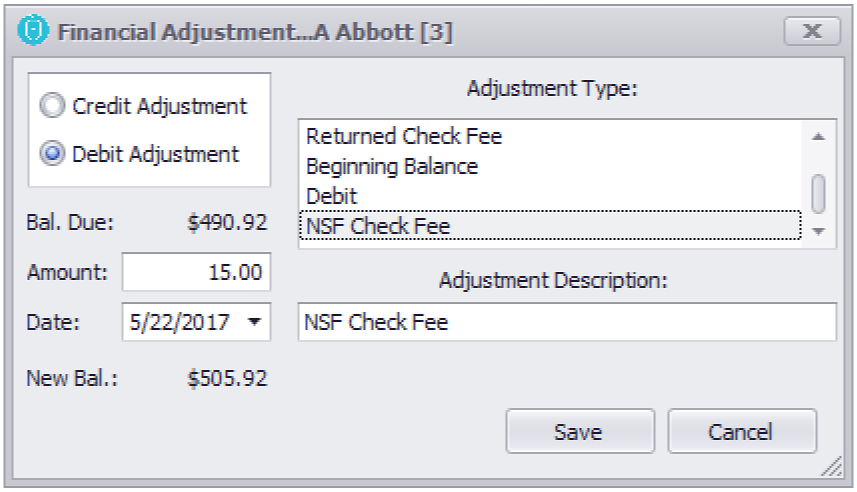
- Locate and open the client account.
- Select the Transactions tab.



- Right-click on a line item to display the Transactions option list and select Financial Adjustment.



- Click the Debit Adjustment tab. A list of Adjustment Types appears.
- Enter the debit amount in the Amount field.
- If you need to record the debit on a date other than today, tab to the Date field and change the date.
- Click a Debit Adjustment Type from the list to the right (these are established during code setup), or tab to the Description field and enter your own.
- Click Save.



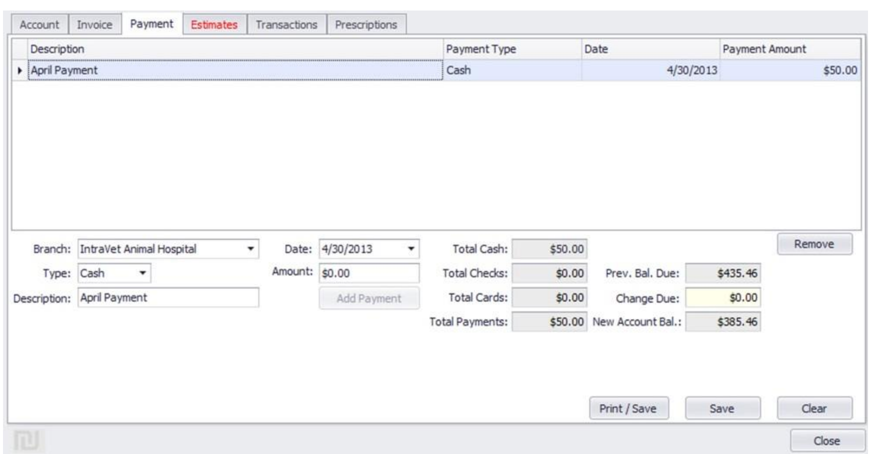
Payments

Payments Tab

Payments can be accepted through the Payment screen.

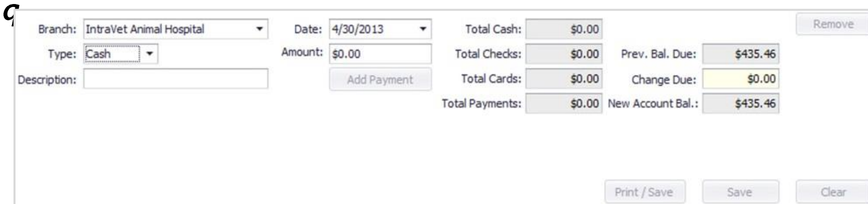
To open a client's Payment screen, first open the client's account.

Select the Payment tab.

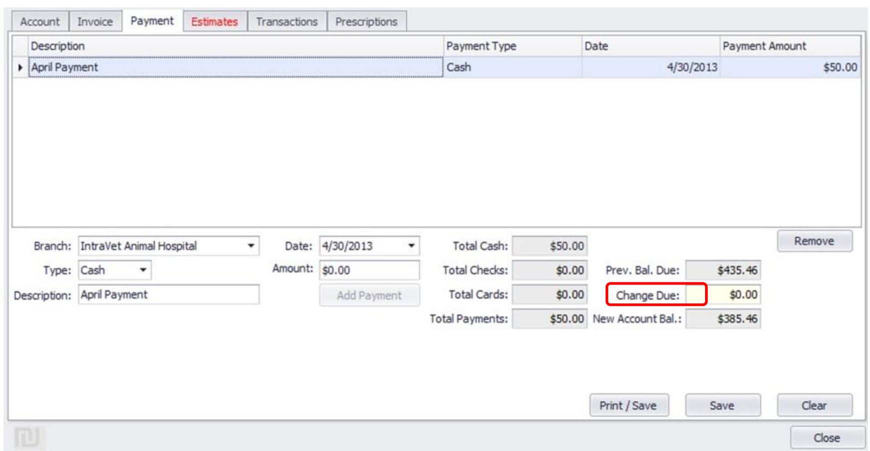


Cash

- **Use the down-arrow to select the appropriate Branch.**
- **Cash should be the default Type. If it is not selected, use the down-arrow to select Cash.**

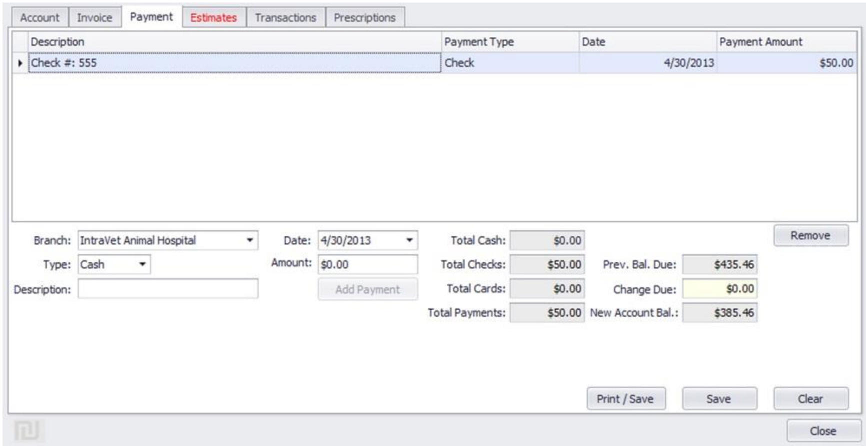


- Enter a Description.
- Today's Date should be the default. If you require a different date, use the down-arrow to select.
- Enter the payment Amount. (When typing in a whole dollar amount, it is not necessary to type the cents (.00). IntraVet will auto-fill the rest of the amount.)
- Click Add Payment.



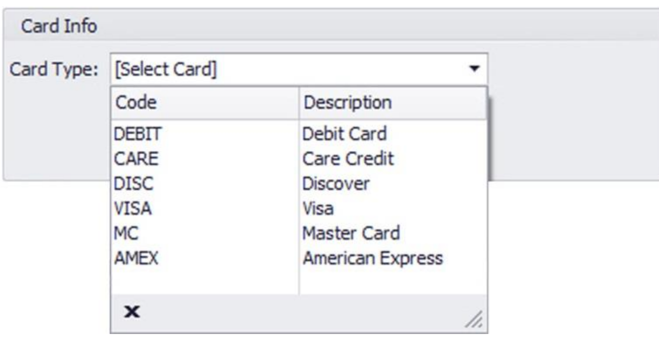
Check

- Use the down-arrow to select the appropriate Branch.
- Cash should be the default Type. Use the down-arrow to select Check.
- Description will change to Check Num. Enter the check number.
- Today's Date should be the default. If you require a different date, use the down-arrow to select.
- Enter the payment Amount. (When typing in a whole dollar amount, it is not necessary to type the cents (.00). IntraVet will auto-fill the rest of the amount.)
- Click Add Payment.

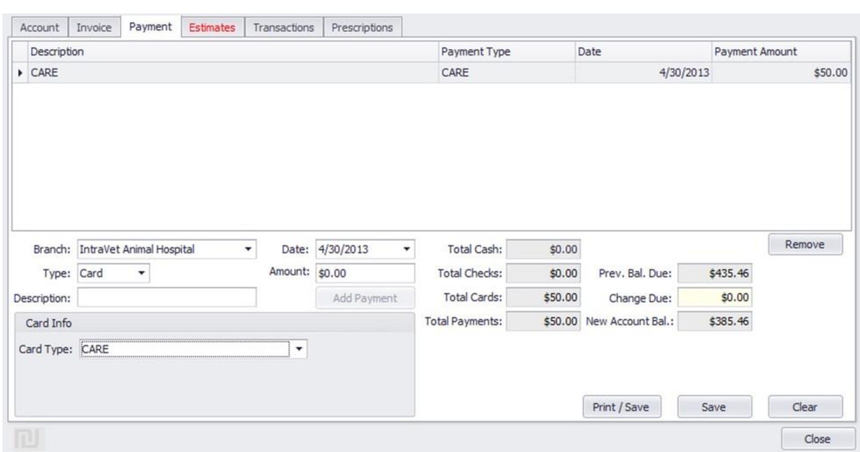


Credit Card

- Use the down-arrow to select the appropriate Branch.
- Cash should be the default Type. Use the down-arrow to select Card.
- Description is optional.
- Card Info appears. Use the down-arrow to select the correct card type.



- Today's Date should be the default. If you require a different date, use the down-arrow to select.
- Enter the payment Amount. (When typing in a whole dollar amount, it is not necessary to type the cents (.00). IntraVet will auto-fill the rest of the amount.)
- Click Add Payment.



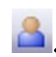
Medical History

Medical History provides a complete, integrated picture of the patient's health.

Open Medical History

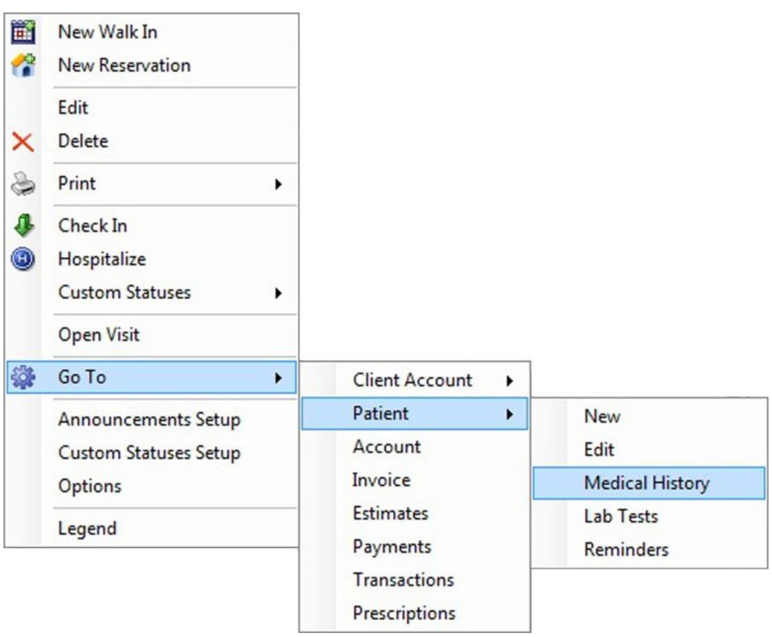
There are several methods to open Medical History; only two are outlined below.

Client Account:

- From the IntraVet Menu Bar, select Open Account . The Client List screen will appear. Scroll, if necessary, to locate the client's name.
- Double-click on the client's name to open that account.
- Click once to highlight the Patient. Click the Medical History icon.

Patient Status:

- In Control Center, right-click on the client/patient Visit line.
- Click Go To | Patient | Medical History.



Medical History Organization

Medical History is organized by Visit or treatment. Summary lines provide an at-a-glance picture of a patient's general health and treatment history.

The Medical History window can be adjusted vertically by hovering over the bottom of the window until a double arrow displays. Hold down the left mouse button and drag the border up or down to change the window size.

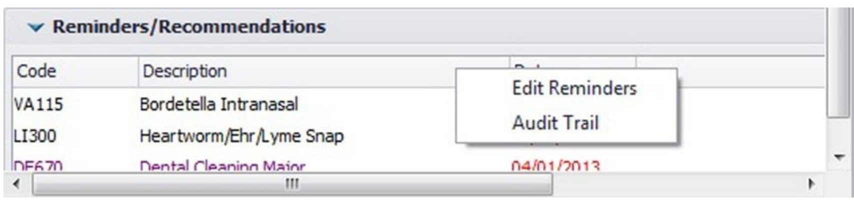
There are several panes that comprise the Medical History window.

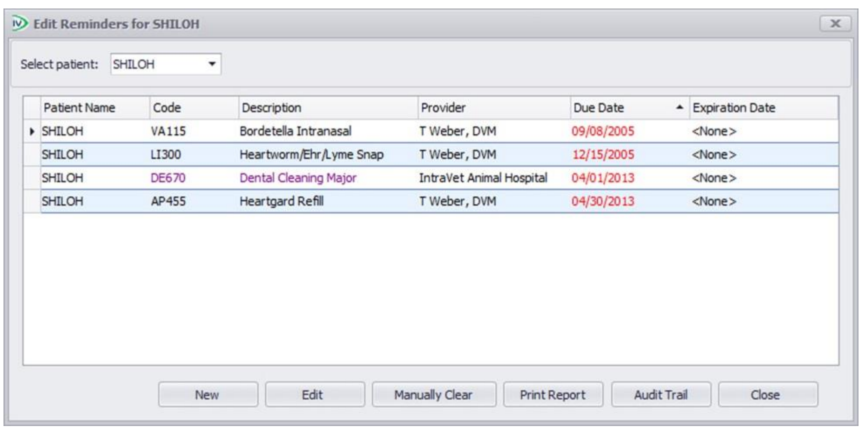
Default panes:

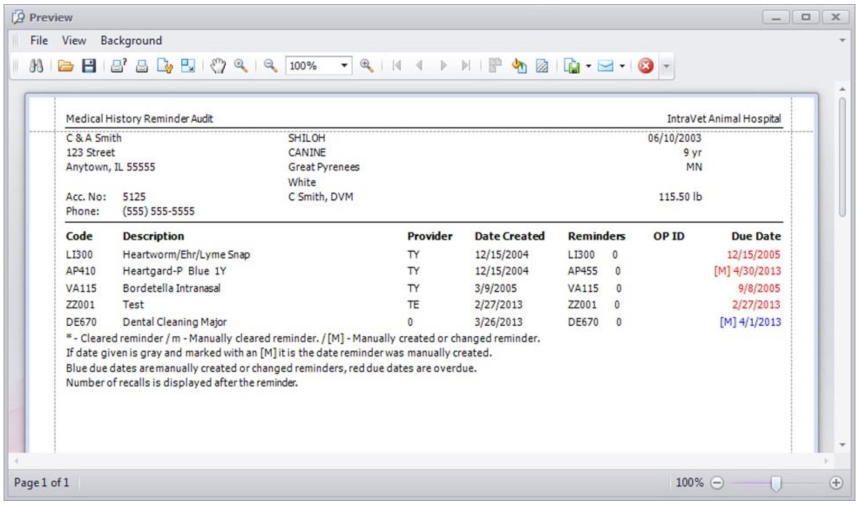
Client/patient – Client and patient information is displayed in the top section of the window.

Problem List – Contains a list of potential problems that the practice needs to address with the client regarding their patient. It can include items like chronic issues, a thyroid condition, a vaccination reaction, etc.

Reminders/Recommendations – Right-click anywhere in the Reminders/Recommendations section to select the Edit Reminders dialog box or Audit Trail.







There are five viewing options in the lower pane: Visits, Prescriptions, Notes, Lab Results and Weight. Visits opens by default.

- Visits
- Prescriptions
- Notes
- Lab Results
- Weight

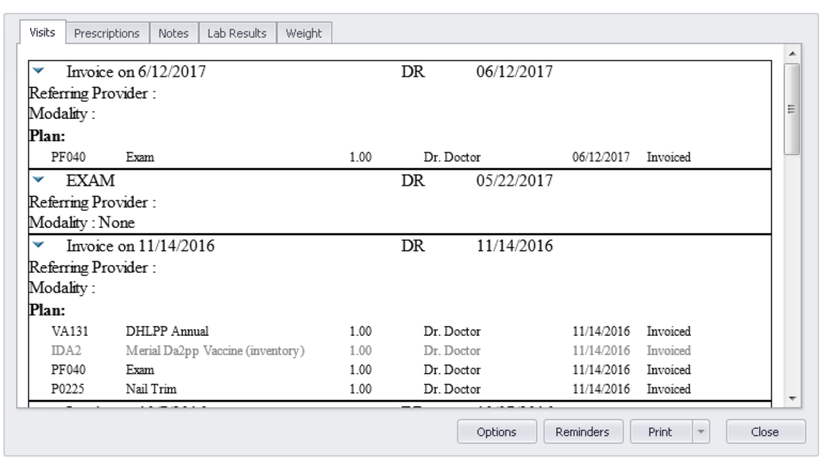
Medical History Viewing Options

To set options for your branch, click the Options button at the bottom of the Medical History window. The options are:

Visits per Page – Select how many visits to display by default on each page.

Latest Prescriptions – Select to display the most recent prescriptions.

Show visit details – Each visit has arrows to expand or collapse a subsection and is scrollable for more information. With this option selected, each visit will be automatically expanded.



Chronological order – IntraVet defaults to displaying most recent visits first, but you can set it to chronological order instead.

Collapse header – does not show detailed client/patient information at top of window.

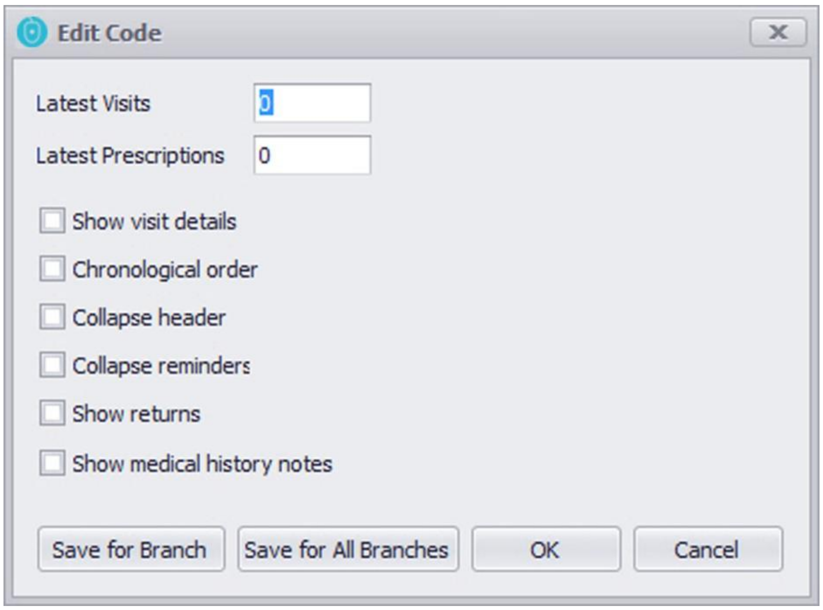
Collapse reminders – does not display detailed information for Reminders.

Show returns – displays a record of returned items.

Show medical history notes – header expanded (most recent visit first).

There are two Save options. Save for Branch saves the options you selected as defaults for just that branch. If you have other facilities and you want them to have the same setup, click Save for All Branches.

To apply the selected options for that patient and that particular viewing, click OK. Once the Medical History screen is closed and re-opened, the default options will re-apply themselves.



Visits – Attachment Hyperlinks

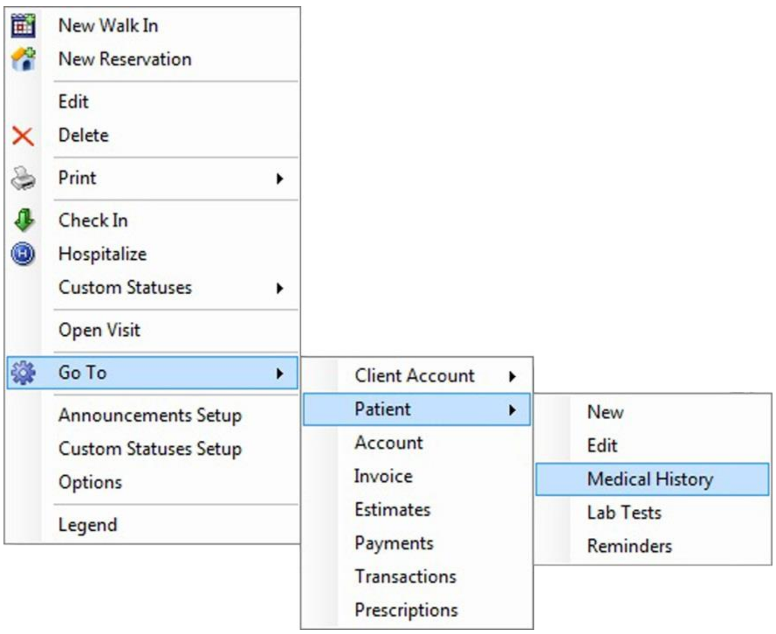
Select the attachment icon (blue paperclip) to open attachments instantly. From there, you can create new or delete existing attachments.

New Visit

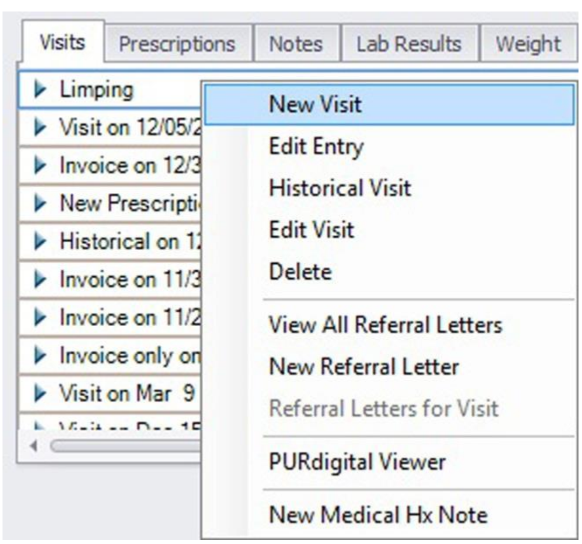
Usually, a new visit is initiated through Appointments, Boarding or the Control Center when a visit is scheduled. It is checked in and displays in Medical History at that point. However, a new visit can also be entered from Medical History for today's date. There are several ways to access the Medical History screen.

Check in a Visit from the Control Center

- **In the Control Center, right-click on the client/patient Visit line under Patient Appointment Status.**
- **Click Go To | Patient | Medical History.**

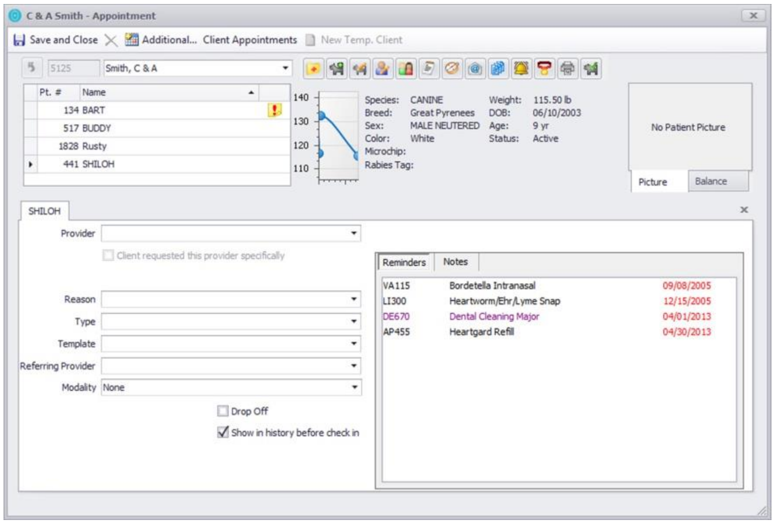


- **Right-click in the Visits pane and select New Visit.**

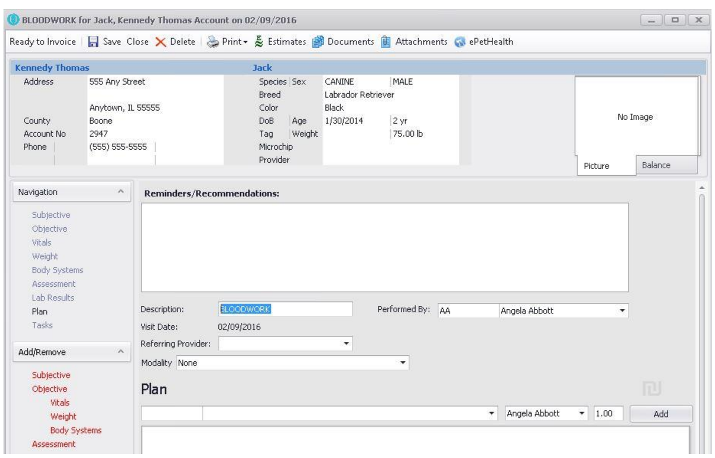


The Appointment window opens. (Medical history can also be added through the Appointment Calendar, Control Center, and Boarding.)

- Use the down-arrow to select a Provider.
- Enter a Reason for the visit or use the down-arrow to select.
- Enter the Type of visit or use the down-arrow to select.
- Choose a Template, if desired.
- Click the Save and Close hot link at the top of the window.

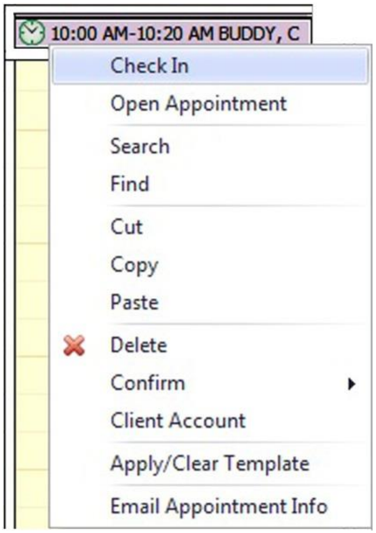


The Visit screen opens to Assessment and Plan, ready for data entry. Scroll or use the navigation section to access other areas of the Visit screen.



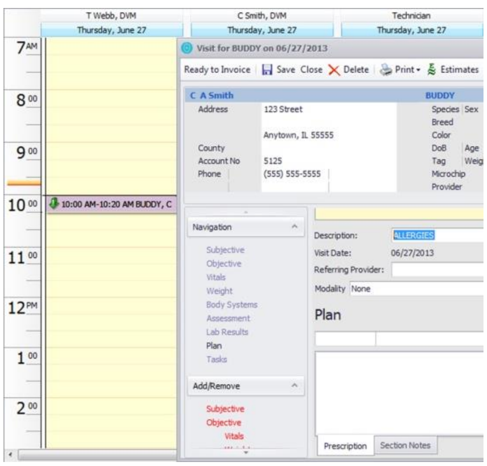
Check in a Visit from the Appointment Calendar

- In the Appointment Calendar, right-click on an appointment and select Check In.



Depending on your Visit settings, the Visit, Invoice or Nothing opens. The Checked In appointment will display with a green arrow, or as ready to invoice, based on your Visit settings.

- To review your Visit settings, go to Setup | Visits | Visit Settings.

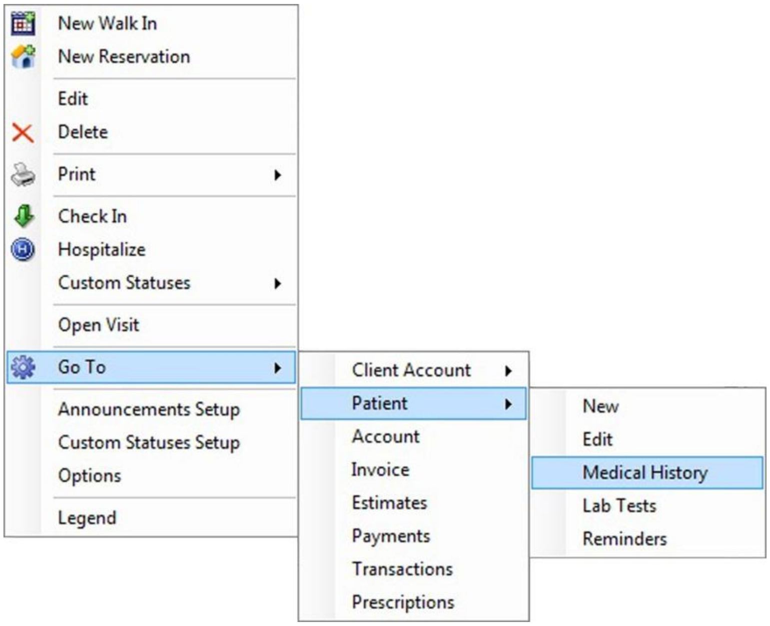


Edit a Visit

Any changes made to a Finalized visit, one that is permanently charged out or manually finalized if there are no charges involved, are tracked via auditing. Current and finalized visits may both be edited from Medical History.

To Edit a Visit / Finalized Visit

- In the Control Center, right-click on the client/patient Visit line under Patient Appointment Status.
- Click Go To | Patient | Medical History.



- Make your changes. If this is a current visit, you can do anything with it except check-in the visit. To Check-In a visit, go to the Control Center.

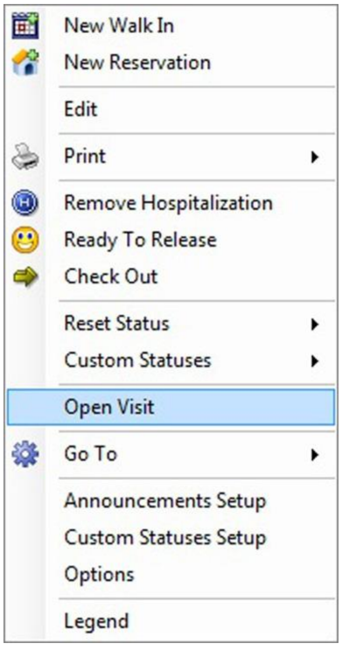
If this is a Finalized visit, notes may be added, and sections may be added or removed. You can add line items to the plan, but they default to Done status and may not be sent to invoice. You can still change the status to Done, Not Done, Deferred, or Rejected.

- Click Save to save any changes.

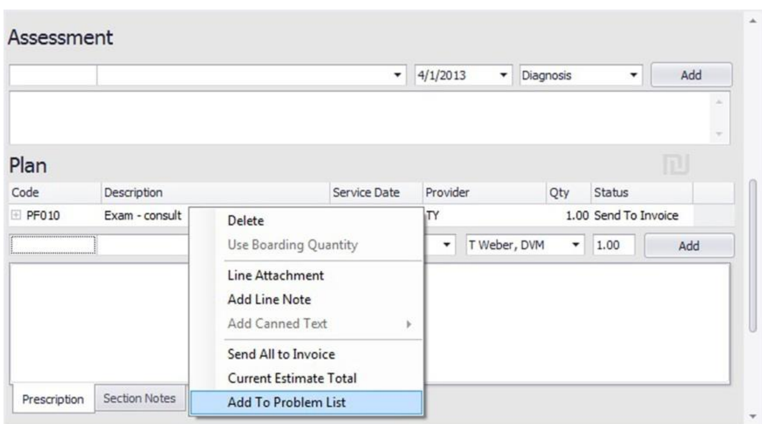
Add a Problem List to a Patient's Medical History

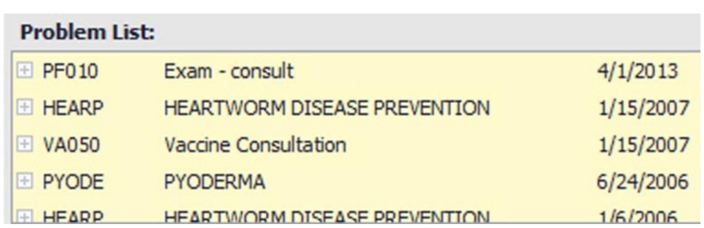
Diagnosis codes can be set to automatically create an entry in the Problem List when they are entered into a visit. You can also set them to prompt you each time. All codes can be manually added to the Problem List (Diagnosis, Procedure, or Inventory). Refer to Setup/General Codes/Diagnosis to select options.

- In Control Center, right-click on the client/patient Visit summary line.
- Click Open Visit.

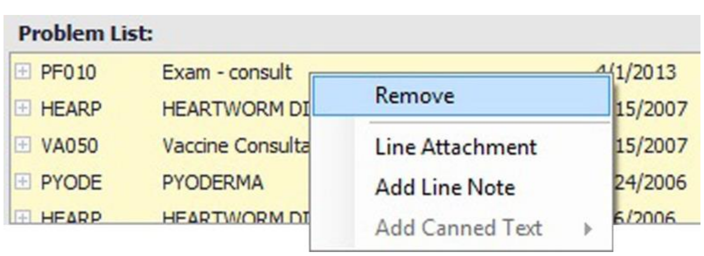


- **Scroll until Plan is visible, or click the Plan section inside the Navigation section. Right-select a line item in the Plan or Assessment section.**
- **Select Add to Problem List. The line item now shows in the Problem List.**





- **To remove an entry from the Problem List, right-click the line and select Remove.**



- Click Close.

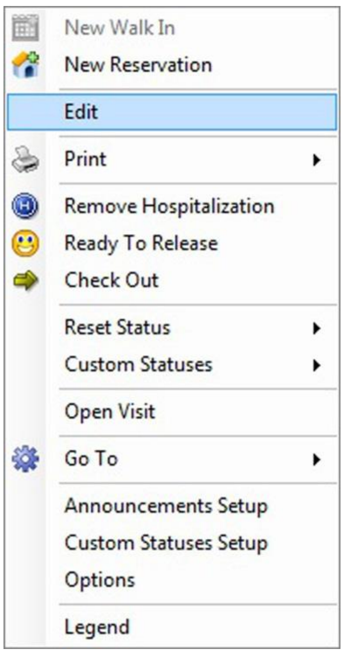
Edit Medical History

Revise Patient Weight

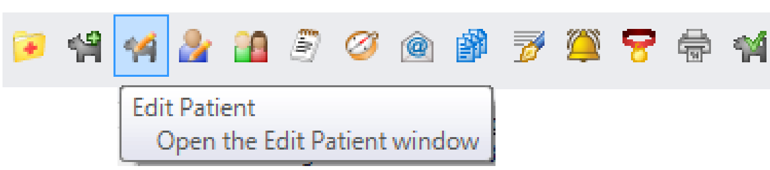
If a patient's weight was recorded incorrectly, for example, the weight can be changed, even on the same day that it was originally recorded.

Patient weight is accessed several ways, one of which is through a patient's history. If necessary, open Control Center by clicking on the icon  in the upper left corner of the main IntraVet window.

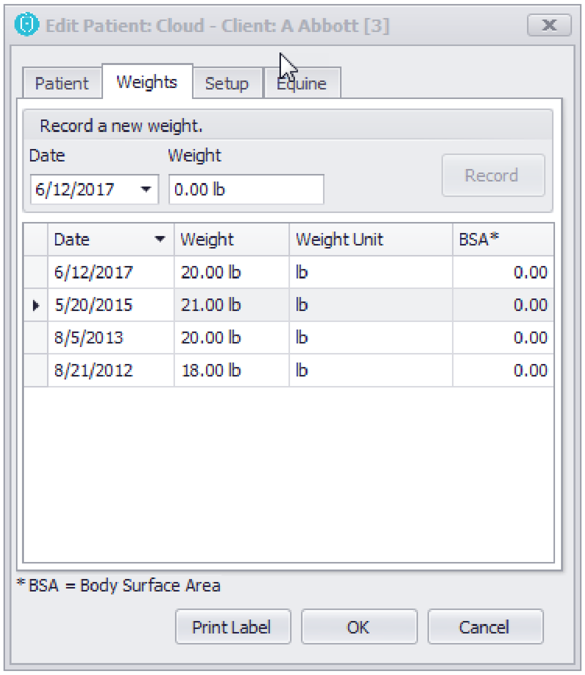
- From Control Center, locate the date of the visit and click once to highlight the client/patient line. Right-click on the client/patient line. Select Edit.



- Click the Edit Patient icon.

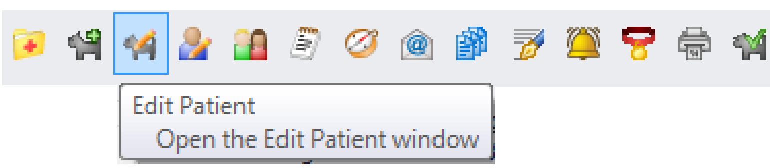


- Select the Weights tab.
- Select the Date.
- Enter the Weight.
- Click Record.
- Click OK.



You can also access the account using the Client Account Management tool.

- From the IntraVet Menu Bar, select Open Account . The Client List screen will appear. Scroll, if necessary, to locate the client's name.
- Double-click on the client's name to open that account.
- Click the Edit Patient icon.



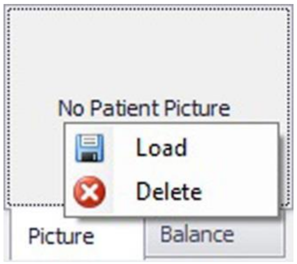
- Select the Weights tab.
- Follow the steps above.

Add Patient Photo

The client oftentimes wants to add a photo of the patient to their file. A photo can be added when the account is created or after it is saved and closed.

To open the Control Center, select the icon  in the upper left corner of the IntraVet window.

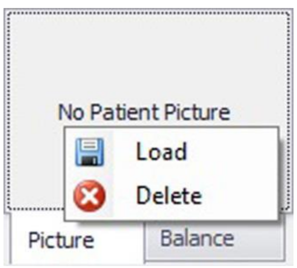
- From Control Center, click once to highlight a client/patient line. Right-click on the client/patient line and select Go To | Account.
- Right-click in the picture frame and select Load.



- Navigate to the location where the patient photo is stored and double-click on the title, or click once on the title and click Open. If you want to change the photo or you loaded the wrong photo, just right-click on the photo and select Delete.

If the client and patient information has already been entered and saved, the client can be located by more than one method, one of which is:

- Click the Open Account icon below the IntraVet Toolbar to locate the client. Scroll to the account or enter the Search field.
- Double-click on the name or click Use or Edit to open.
- Right-click in the picture frame and select Load.
- Navigate to the location where you store patient photos and add the photo.



Add Medical Image

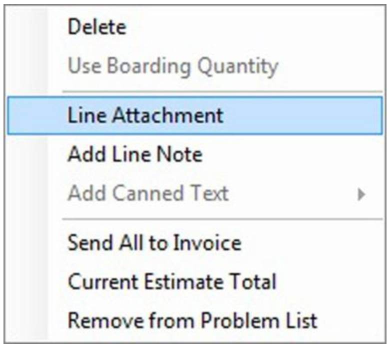
IntraVet supports BMP, JPG, PNG, and TIF image formats; Doc, PDF, XL, Journal files, and Dicom* file types are also supported. Scanned documents, digital camera and/or ultrasound images that meet these requirements can be stored in the patient's medical history.

*Dicom requires additional equipment, software and setup.

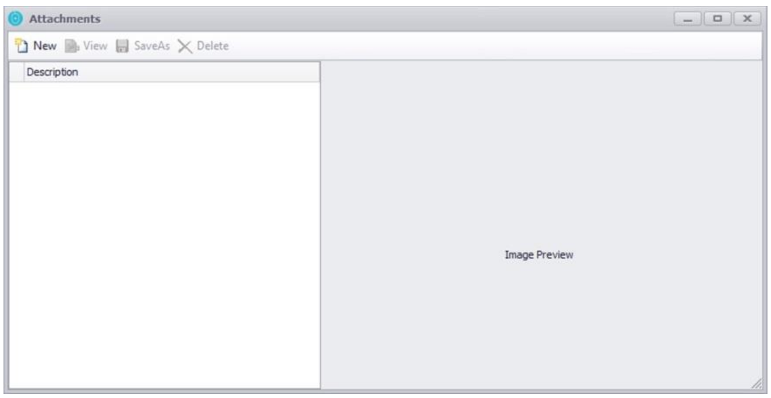
Stored images can be displayed, printed and emailed as an attachment.

Images are attached to the patient's medical record from the Control Center. Use the calendar to locate the day of the patient's visit.

- Double-click on the client/patient line to open the visit or right-click and go to Open Visit.
- Right-click on the Plan line where you want to attach the image.
- Choose Line Attachment from the pop-up menu.



An Attachments window appears.

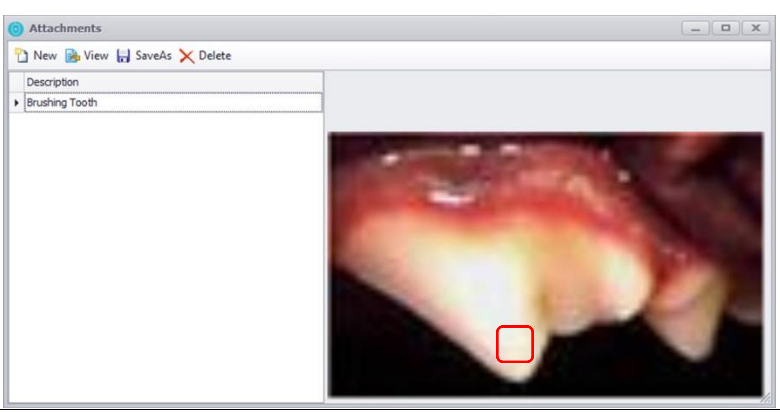


- Click New. Navigate to the location where the image is stored and double-click on the title, or click once on the title and click Open. If you want to change the image or you loaded the wrong image, click once on the image to highlight and click Delete.

When an image is attached to a Plan line, an attachment icon (page and paperclip) appears next to the line. You can attach multiple images to a Plan line.

- If you want to change the image's name, select Save as in the Attached Files Screen's Menu Bar. Give the image a new name and click Save As.
- To remove an image, select Delete.

An image can be manipulated (e.g., rotate, zoom, fix color) by either double-clicking on the image or clicking on View in the Menu Bar, then making a selection from the Menu Bar above the image.



Both the Attachment and image enhancement windows can be resized by clicking on an edge and dragging the mouse.

If you make changes to an image, you can save it under a different name to preserve the original image or overwrite the original image.

To view an image,

- Right-click on the Plan line where you want to attach the image.
- Select Line Attachment from the pop-up menu. The Attachments window appears.
- Highlight the image you want to see and it will show in the right pane of the window.

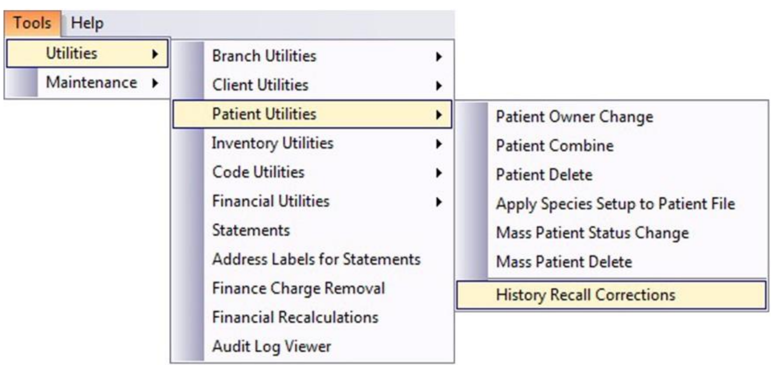
If a Plan line with attached images is deleted, the images are also deleted.

If an invoice is deleted, images attached to a Plan line originating from that invoice are deleted.

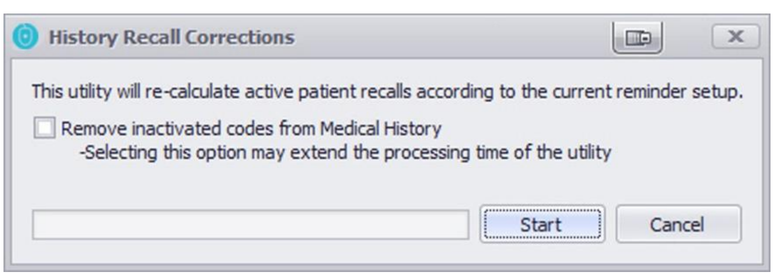
Edit Reminders

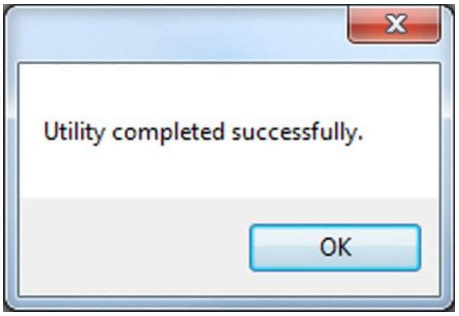
Reminders are generated based on the code setup. You can set up codes to generate and clear each type of reminder: Regular, Manual, Callbacks and Recommendations. If reminders are not behaving as you like, chances are, it is a code setup issue. First, make sure your codes are set up correctly. Then, run a reminder update utility (Patient History and Recall Corrections) to apply your changes to existing history, and recalculate reminders.

- From the IntraVet Menu Bar, select Tools | Utilities | Patient Utilities | History Recall Corrections.



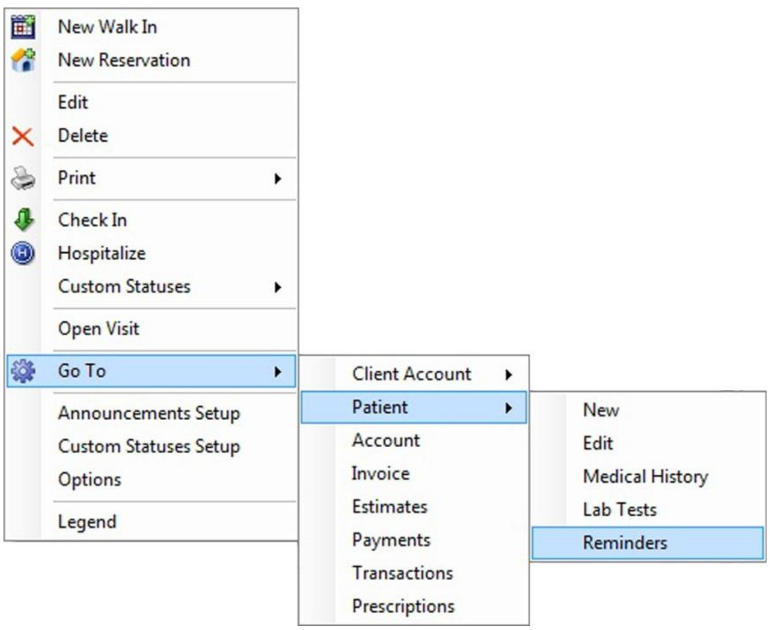
- Click Start.





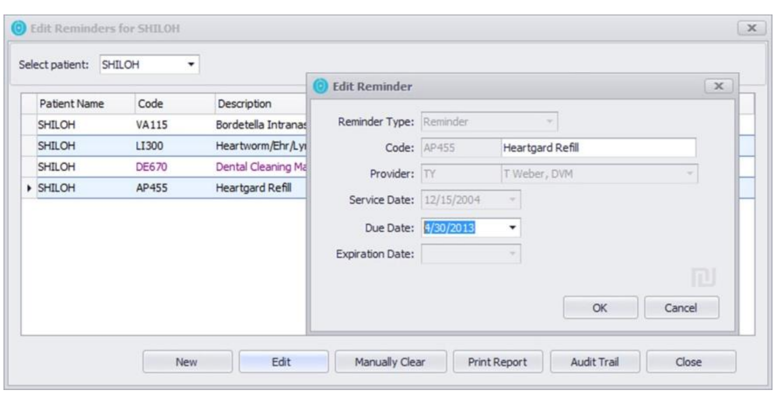
The reminders on a patient may also be manually added or changed rather than generated from previous line items. The recalculation feature updates an individual patient's reminders based on any changes that were made and/or the current code setup definitions.

- From the Control Center, right-click the client/patient line and select Go To | Patient | Reminders.



All outstanding reminders (or manually cleared reminders) display.

- Click once on a reminder to highlight. Scroll if necessary to locate the reminder.
- Click Edit. You can change the Due Date for reminders and the Expiration Date for Recommendations.

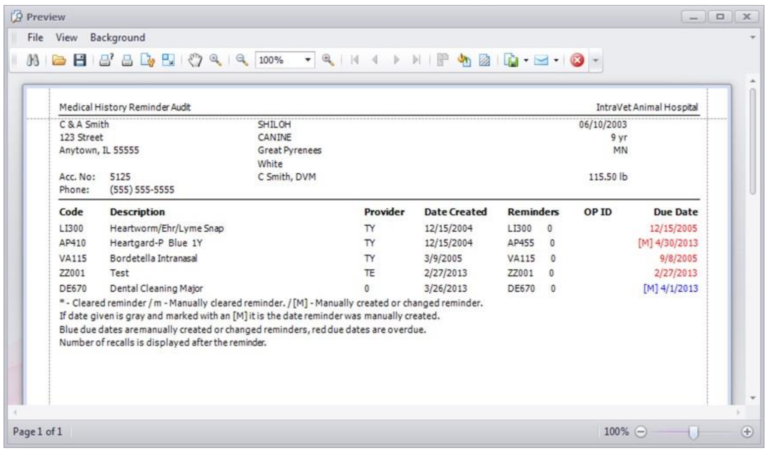


You can also click the Manually Clear button to remove the reminder without having another code given that clears or satisfies it. Be sure that the reason you must do this has nothing to do with code setup issues. You can delete the reminder only if it was manually entered.

Audit Trail

The audit trail button displays and/or prints a list of the patient's reminders and indicates the date it is/was due and how a reminder was changed.

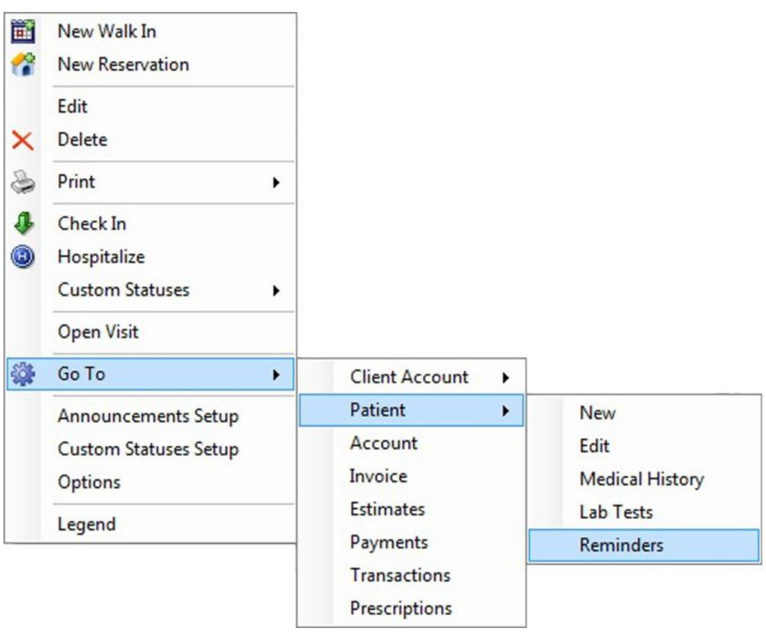
- After a reminder has been edited or removed, click the Audit Trail button if you want to view it before printing.



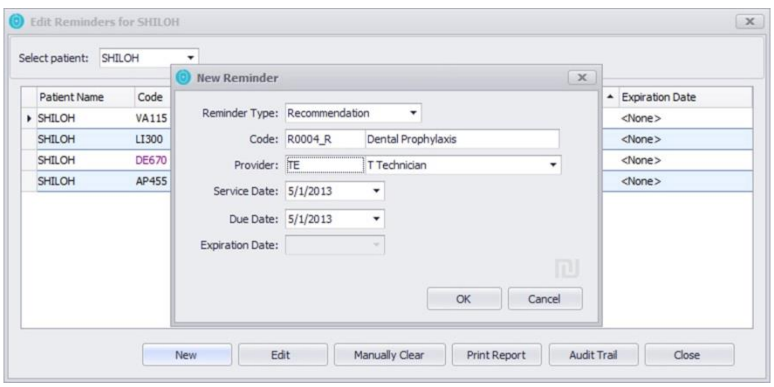
Add a Reminder (Recommendation)

You can manually add a reminder (or recommendation) instead of generating it from codes added to the Medical History.

- From the Control Center, right-click the client/patient line and select Go To | Patient | Reminders.



- Click New.
- Select a Reminder Type. The choices are:
  - Reminder
  - Recommendation
  - Callback
- Enter a Code in the blank entry line, or use the down-arrow to select. Double-click to place in the field.
- Enter a Provider in the blank entry line, or use the down-arrow to select. Double-click to place in the field.
- Select a Service Date (today's date will default).
- Select a Due Date (today's date will default).
- Select an Expiration Date if creating a callback (when requested).
- Click OK.



You can send mailings and emails to patients and clients meeting certain criteria without having reminders entered. For example, you can find patients between 6 months and 36 months old who are not altered, geriatric patients not on Rimadyl or Etogesic, etc. These types of searches are done in Communications/Recall Generator; refer to the chapter Communications, Recall Generator.

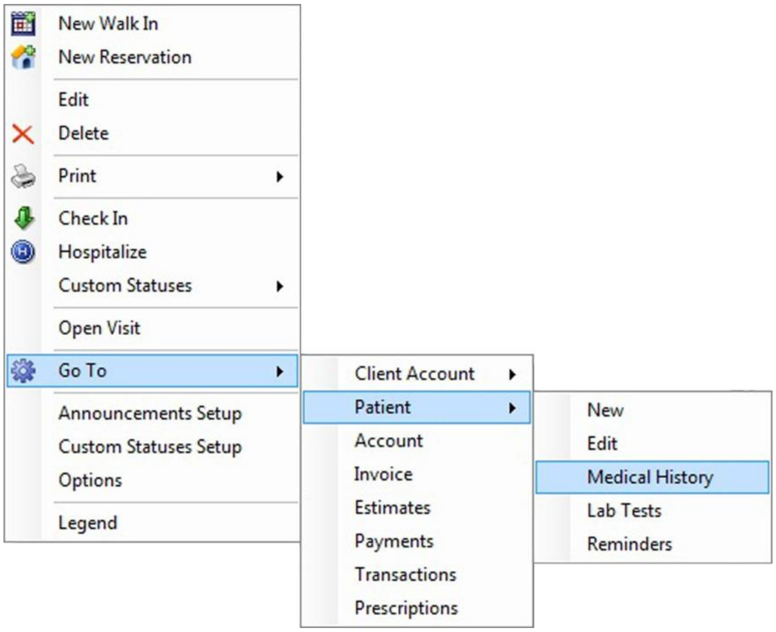
Prescriptions

Prescriptions are created and managed through the patient's Medical History, Visit and Invoice.

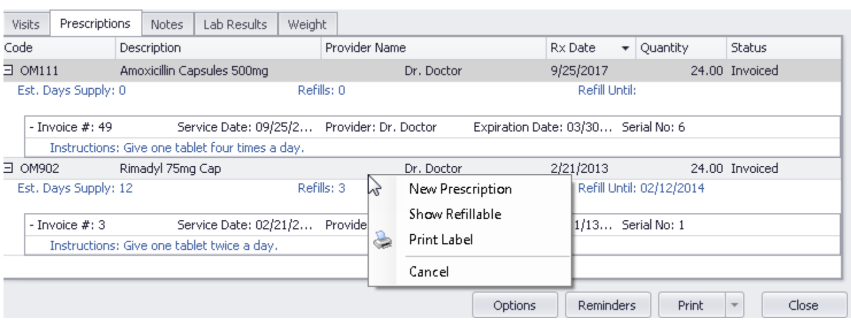
New Prescription

A new prescription can be completed directly through invoicing or through Medical History with the same options described below for refills.

- In Control Center, right-click on the client/patient Visit line.
- Click Go To | Patient | Medical History.

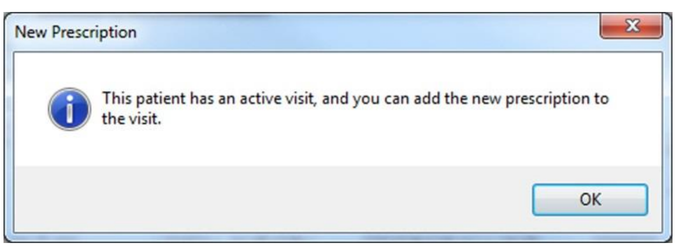


- Click the Prescription tab.
- Right-click in the Prescription pane and select New Prescription.



You may be asked for a password, if set up. You may also be brought to an existing visit if the patient has other services currently underway to add your refill.

- Click OK to the existing Active Visit reminder and it will take you to that visit.

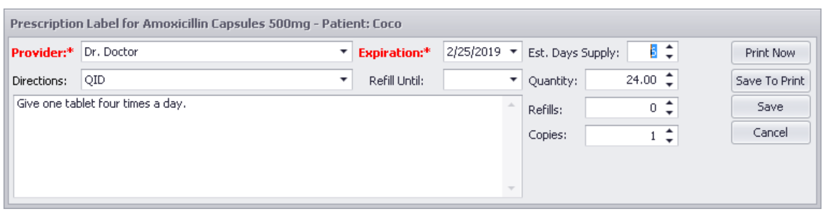


- Fill in the information as needed.
  - Provider – prescribing doctor.
  - Expiration – the expiration of the inventory item itself, usually entered through inventory receives. Date shortcuts can be used ("T" for Today, "W" or "K" for the beginning or end of the week, "M" or "H" for month, "Y" or "R" for year). You can also arrow over to the year and press the arrow to change the month one month at a time.

- Directions – can be preset from the inventory code setup and customized per code. You can choose from common canned text. Unlimited choices can be set up by selecting Setup | Forms | Canned Text | Prescriptions from the IntraVet Menu Bar.
- Refill Until – enter a date that a refill can be approved until (in addition to the number of refills).
- Est Days Supply (optional) – Some states require this for controlled drugs.
- Quantity – number of pills.
- Refills – the number of refills approved. This number decreases as you generate additional labels for the same code/patient.
- Copies – the number of copies to print can be set globally. From the IntraVet Menu Bar, select Setup | Forms | Bulk Prescription Labels menu. However, you can change it for individual prescriptions as needed.

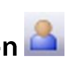
Inventory codes must be set up to generate a prescription prompt in order to get the prescription prompt in invoice.

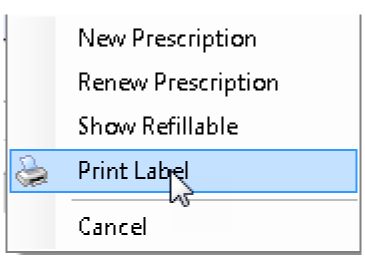
- Click Print Now (prints and sends to invoice or adds to existing visit) or Save to Print to send to the invoice/current visit. It will print with the invoice instead.



Reprint Prescription Label

Reprinting does not create pending charges or affect the number of refills remaining.

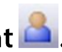
- Click the Open Account icon  from the IntraVet Menu bar.
- Scroll to the client/patient. Click once to highlight.
- Click Use.
- Click the Prescriptions tab.
- Locate the Rx to print; right-click on it, and select Print Label.

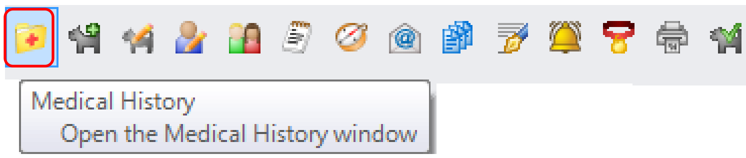


Edit Prescription

If the visit has not yet been finalized (invoiced out), you can change the Prescription in Medical History or in the invoice. The visit can be accessed in Control Center.

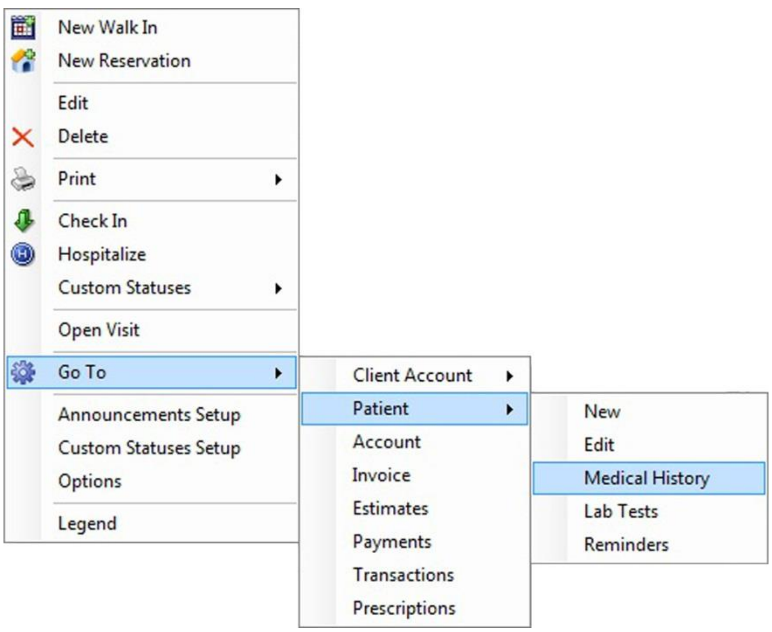
Your Operator ID and/or a password may be required depending on your setup.

- From the IntraVet Menu Bar, select Open Account . The Client List screen will appear. Scroll, if necessary, to locate the client's name.
- Double-click on the client's name to open that account.
- Click once to highlight the Patient. Click the Medical History icon.

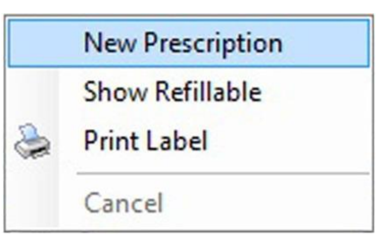


Or,

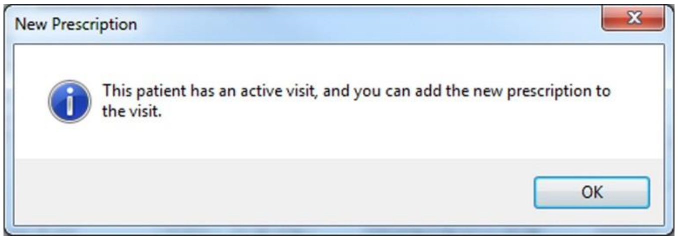
- In Control Center, right-click on the client/patient Visit line.
- Click Go To | Patient | Medical History.



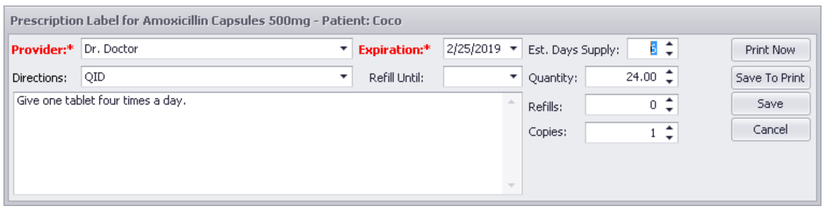
- Screen will open to Visits by default. Select the Prescriptions tab.
- Right-click in the prescription. Select New Prescription.



You may be directed to an Active visit.



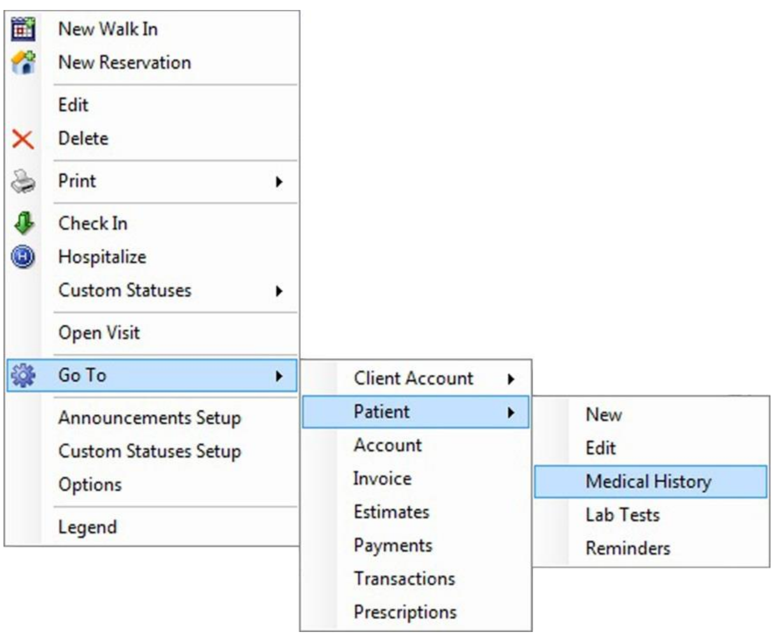
- Click OK.
- Move to each field where you need to edit information.
- When you have finished making changes, click Print Now, Save to Print, Save, No Label, or Cancel.



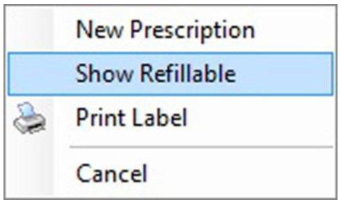
Refill Prescription

Prescriptions can be refilled (if the initial prescription had been marked for refills and the visit has already been invoiced). Choose the prescription code in invoicing/visit or through Medical History.

- In Control Center, right-click on the client/patient Visit line.
- Click Go To | Patient | Medical History.



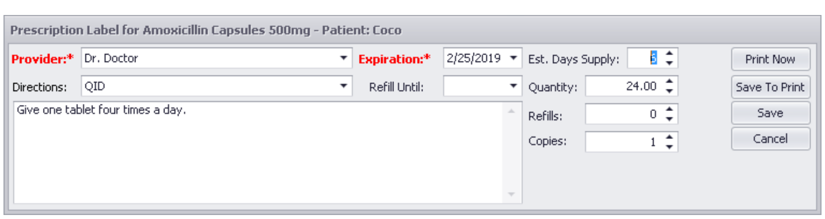
- Select the Prescriptions tab.
- Right-click in the prescription. Select Show Refillable.



You may be asked for a password, if set up. You may also be brought to an existing visit if the patient has other services currently underway to add your refill.

- Fill in the information as needed (and as allowed).
    - Provider – prescribing doctor (cannot be changed on a refill).
    - Expiration – the expiration of the inventory item itself, usually entered through inventory receives. Date shortcuts can be used ("T" for Today, "W" or "K" for the beginning or end of the week, "M" or "H" for month, "Y" or "R" for year). You can also arrow over to the year and press the arrow to change the month one month at a time.
    - Directions – can be preset from the inventory code setup and customized per code. It includes the drug description. You can also choose from common canned text. Unlimited choices can be set up by selecting Setup | Forms | Canned Text | Prescriptions from the IntraVet Menu Bar. Right-click in the Instructions area to choose from BID, TID, etc. and insert these canned instructions.
    - Refill Until – enter a date that a refill can be approved until (in addition to the number of refills).
    - Est Days Supply (optional) – some states require this for controlled drugs (doctor cannot be changed on a refill).
    - Quantity – number of pills (doctor cannot be changed on a refill).
    - Refills – the number of refills approved. This number decreases as you generate additional labels for the same code/patient (doctor cannot be changed on a refill).
    - Copies – the number of copies to print can be set globally. From the IntraVet Menu Bar, select Setup | Forms | Bulk Prescription Labels menu. However, you can change it for individual prescriptions as needed.

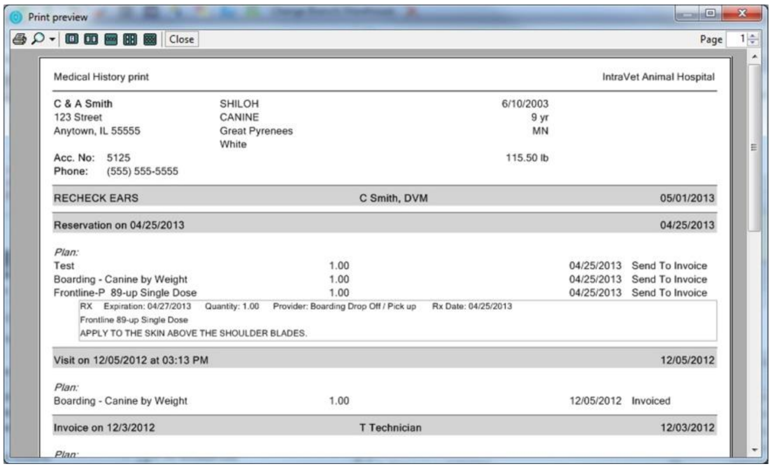
      Inventory codes must be set up to generate a prescription prompt in order to get the prescription prompt in invoice.
- Click Print Now (prints and sends to invoice or adds to existing visit) or,
- Save To Print to send to the invoice/current visit. It will print with the invoice instead.



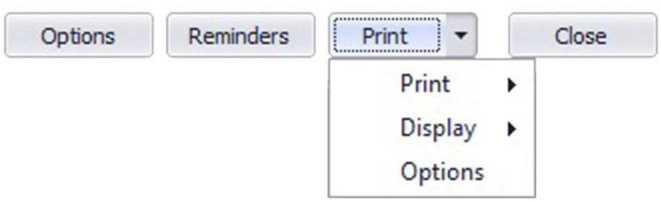
Printing History

Medical History can be printed for any highlighted patient based on the criteria selected under Print Options.

- Choose the Print drop-down menu in the Medical History window and select one of the following options:
  - Print – to print without changing your default print options.
  - Display – to review the printout prior to sending the job to the printer.



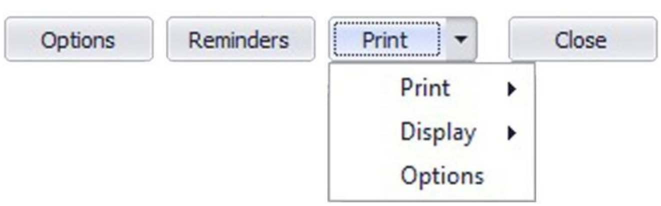
- Options – Date Limit, Day and Visit Limit if you want to print only the five most recent visits, for example. Reminders, Problem List, Weight History, Chronological (if unchecked it prints the most recent visit first).



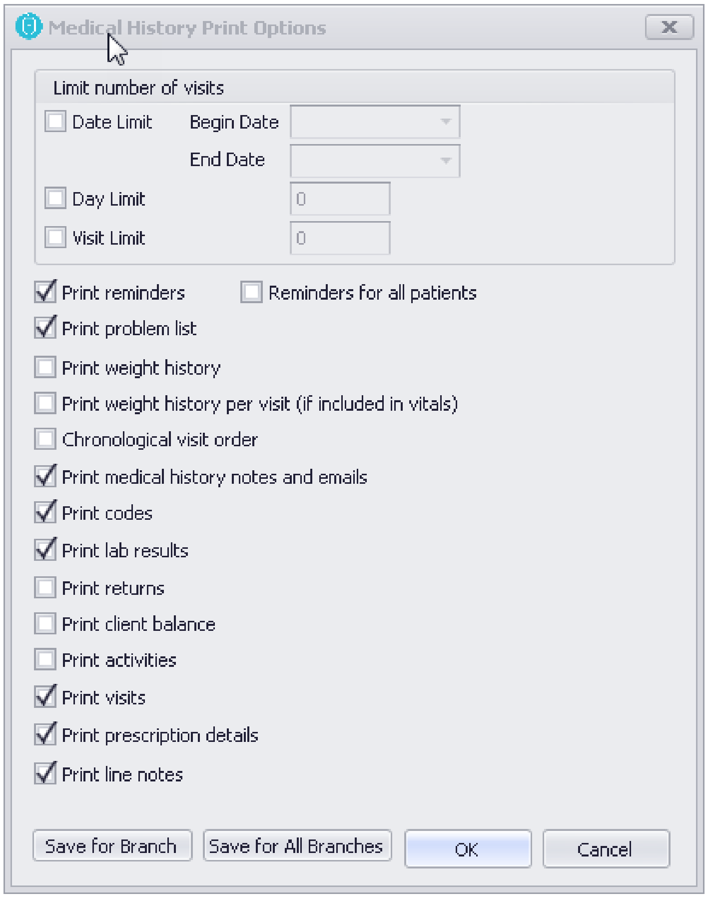
Emailing Patient History

Medical History can be emailed for any patient based on the criteria selected under Print Options.

- Open the Medical History for the patient whose records you wish to email, click the drop-down menu next to Print and select Options.

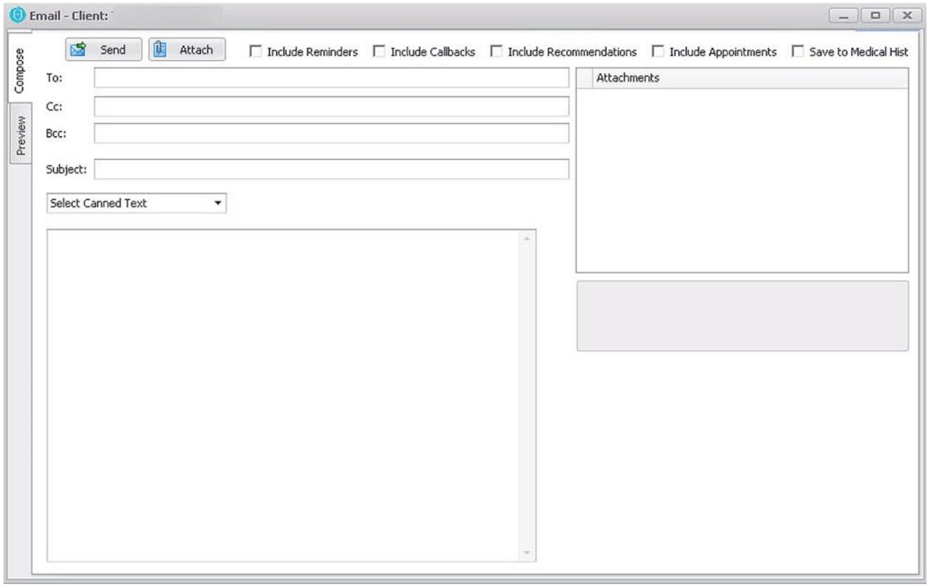


- Set up your print options as shown below. These will help you choose what part of your patient records gets emailed.



- **Choose OK to save your changes.**
- **Next select Email from the bottom left of the Medical History Window.**

- **Choose a recipient by typing the email address in the "To" field and choose to include any other information and/or save the email to the patient's medical history, add any other attachments and you are now ready to send your patient's medical history records.**


Email - Client:
Compose
Preview
Send
Attach
Include Reminders
Include Callbacks
Include Recommendations
Include Appointments
Save to Medical Hist
To:
Cc:
Bcc:
Subject:
Select Canned Text
Attachments

Communications

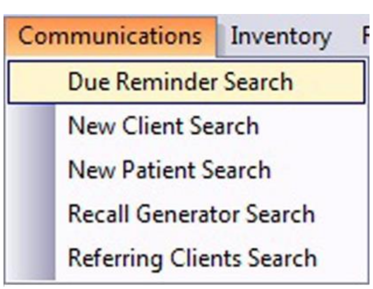
The Communications section provides your practice ways to search for and communicate with your clients. You can search your client database using many different parameters and then send emails, printed cards, letters, or labels, or you can export your Result List. The following types of searches are available:

- Due Reminders: Search for specific or all due procedures, callbacks and/or recommendations within a date range. Then, email, send postcards or letters to clients. You can also export the results to send them to a third party that generates your reminders for you, like our online reminders.
- New Clients/New Patient Searches: Search by entered date of the client or patient to send welcome packets or coupons.
- Recall Generator: Search by certain client or patient parameters to target a specific audience for promotions like dental care, spays/neuters or heartworm/flea/tick preventative.
- Referring Clients Search: Find and thank clients who referred others to your practice.

Due Reminders

How to Search for Due Procedures, Callbacks or Recommendations

- From the IntraVet Menu Bar, select Communications | Due Reminder Search.



- Enter a Beginning and Ending Date range to find recalls due within a time period. You can also select the down-arrow to make your choice from a calendar.

  Only codes due within that period will be included. To find outstanding past due reminders, change your beginning date to include earlier months.

- Select a specific Branch or All Branches.
- Age (optional): You can limit your search by the patient's age. Age can be selected by years, months, or days. Click the down-arrow and select the appropriate increment. Click the down-arrow; then, double-click on Equal to, Less than or equal to, Greater than or equal to, or Between.
- Enter the number (in the increment selected in the step above: years, months, or days) in the next box. The second age box activates if you choose Between so that you may enter both ends of an age range.
- The species (top Code and Description pane) defaults to all breeds (Description box defaults to all checked).

  If you want to include only certain species:
- Uncheck a checkbox to remove that species. Leave a check for only the species you want to include.
- If you want only one (or a few species), it is quicker to exclude all species by removing the check in the checkbox next to Description; then, check the species you do want.
- Codes (lower Codes and Description pane) defaults to all due codes. This section is optional. Leave this area blank if you want to include all due codes within the date range or to exclude certain codes.

  If you want to search for specific codes:
- To enter a code in the bottom of the grid, type the first few letters in either the Code or Description fields to search for the code you want, or select the down-arrow next to Description and make your selection. A box displaying all the codes and descriptions pops up. Double-click on either the code or the description. Your choice appears in the two fields underneath the Codes/Description pane.
- Click Add to move the selected code into the grid. If you decide you do not want the code/description after it is moved to the pane, select the code or description to highlight and select Delete.

  Additional Search Options:
- Search All Recalls (checked by default). When checked, IMPORTANT: Search All Recalls marks the codes found in the search as recalled. With each successive search, the recall number increases. Every time you do a Search All Recalls, it marks reminders found with a search counter. This is how you track how many times you have sent reminders for a certain code/patient.

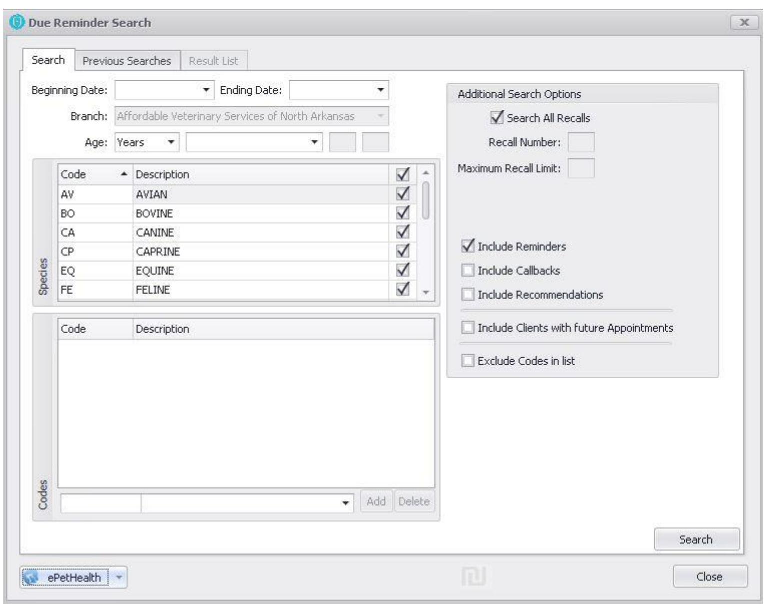
  Check this box only when you are actually sending out recalls – whether it is via card, letter, email or exported. Then, your recall information will be correct and valuable when you report on compliance rate and response.
- Recall Number (optional): Enter a recall number to search for codes only on that round of recalls. For example, enter a 2 to find all patients on their second reminder.

  Maximum Recall Limit (optional): Enter the maximum for rounds of reminders. For example, if you enter 3, patients will only be included in search results up to three times, and then will automatically be removed from the search results.

Leave Maximum Recall Limit set at 0 (zero) to include all outstanding reminders in the due date range. If a limit is entered this may exclude reminders you want because too many real searches have been processed.

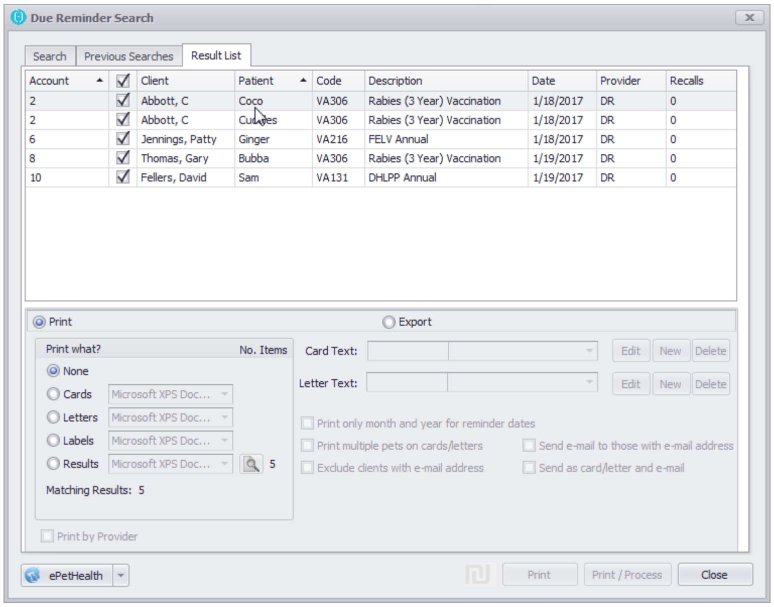
- Include Reminders, Include Callbacks, and Include Recommendations: This defaults to Include Reminders, but you can search for any one or all three recall types. Typically, reminders are for necessary, specific procedures (vaccinations, annual exams); callbacks are for checking on patients after a surgery; recommendations are for general health maintenance areas like diet and dental health.
- Include Clients with future Appointments will include clients/patients that are currently scheduled with an upcoming appointment on the IntraVet calendar.
- Check the Exclude Codes in List box if you want to search for all due codes except the ones entered. Leave blank to search for entered codes only.
- Click Search. A progress bar indicates that your search is in progress.

  If you are logged into ePetHealth, to access your practice's Health Service Reminder setup within ePetHealth, select the ePetHealth button at the bottom left of the Due Reminder Search window. Select either Email & Text Reminders to launch the ePetHealth Health Service Reminders – Email / Text setup page, or choose Postal Reminders to launch the ePetHealth Health Service Reminders – Postal setup page.

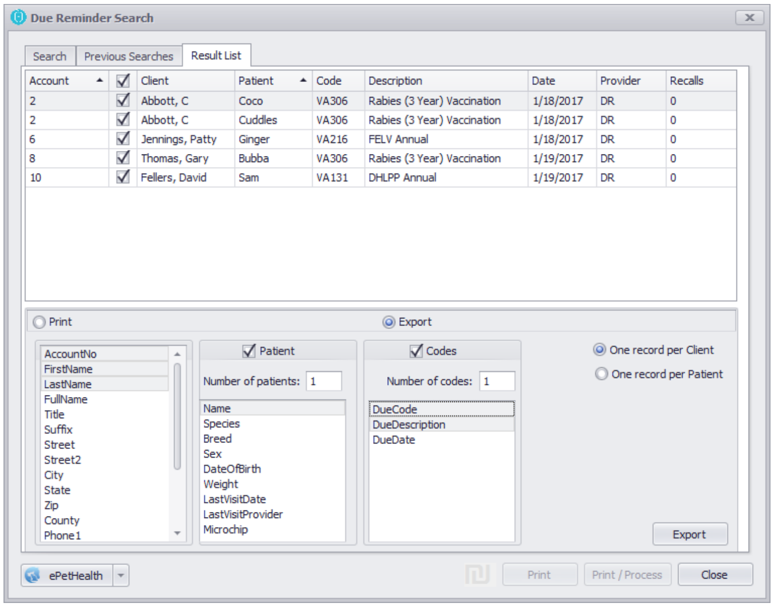


Result List

- The Result List tab automatically opens when the search is complete to display a complete list of results.
- Click the Print radio button. This will display the number of Matching Results.
- When either the Cards or Letters radio button is selected, the canned text field becomes activated.
- If you want to create a new Card or Letter or edit the "canned text" version, select the Edit or New button to the right. Make your edits. Click Save. (See Edit Result List below.)



- When the Export radio button is selected and the Patient box is checked, the Number of patients, One record per Client and One record per Patient will be activated.
- Select the Export tab.
- Place a check in the Patient checkbox in the Patient Section to activate the option for Number of patients, one record per Client and One record per Patient. If a client has more than one patient matching your search criteria, you may want to send only one card, letter or email.
- If exporting patient information, enter the Number of patients per Client to include (maximum is 9).
- If exporting client information, click to highlight each client field (far left pane) to export.
- Select One record per Client or One record per Patient.
- Place a check in the Codes checkbox in the Codes section to activate the option for Number of Codes.
- If you want to export codes, enter the Number of Codes.
- Highlight the code information to be included.
- Click the Export button.

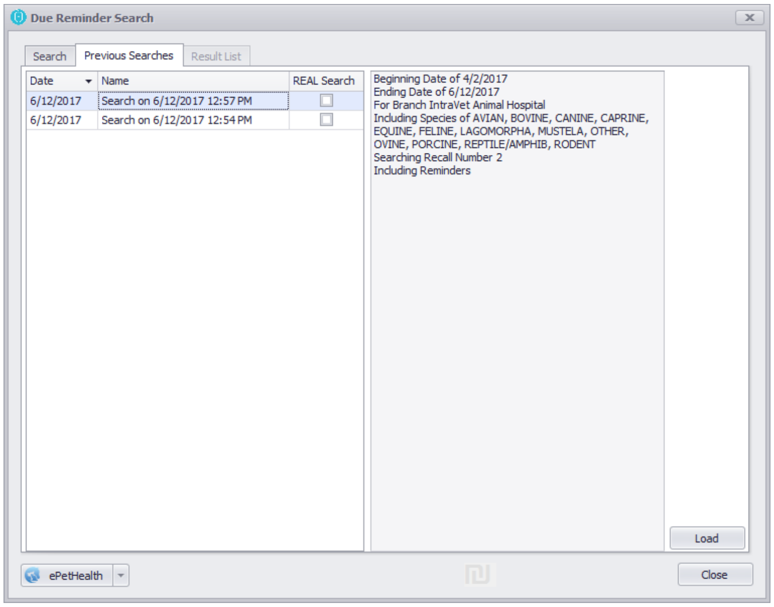


- A Save As window appears.
- Navigate to the location where you want to save your exported record and name your file.
- Save as Type: Choose the file type you want to save it as. You can export it as Delimited text, Excel, XML, or Healthy Pet (encoded for use with *Healthy Pet* magazine).
- Click Save.

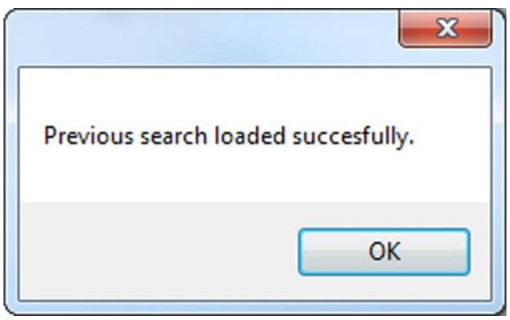
Load Parameters and Reuse a Reminder Search

IntraVet saves the most recent search parameters for audit purposes and convenience so that you can reuse them. You may want to use the same search criteria several times. To load previous search parameters:

- Click the Previous Searches tab. The list of the most recent searches with time and date appear in the left column.
- Select a search to view its details to the right. Details include all parameters chosen for the search.



- Double-click on the search you want to reuse, or click once to highlight and click Load. Screen will pop up to tell you the Previous search has loaded successfully.



- Click OK. This will take you to the Search screen. All the parameters are reloaded in the search screen, including date range. Dates can be changed by entering new beginning and ending dates.
- Edit information as necessary.
- Click Search. Result List will open.

Due Reminders – Edit Result List

When your search is complete, the Result List populates. These are patients and clients matching your search criteria. You can edit or research this list before sending emails, cards, letters or exports.

To remove a contact from the Result List:

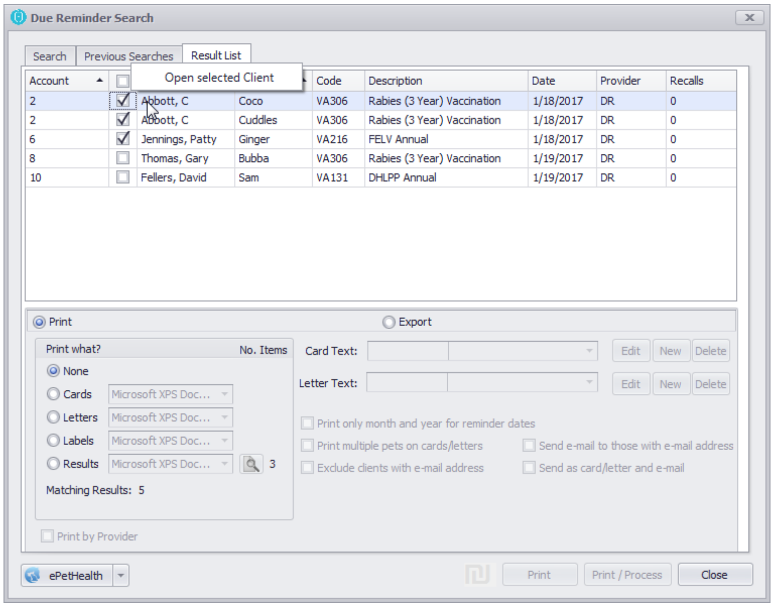
- Uncheck the box on the right. This will omit them from the Print/Process.

To print the Result List:

- Click Print/Process in the lower right corner of the Result List window.

You can also go to the client's account:

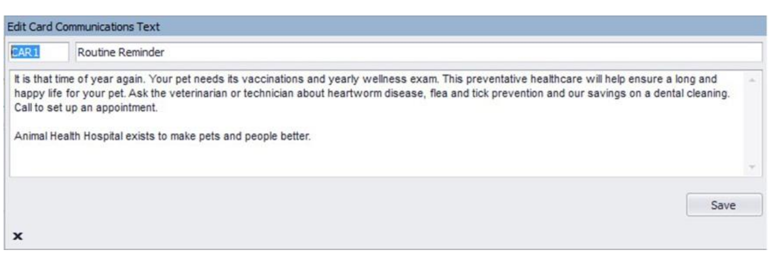
- Right-click and select Open selected Client.



Due Reminder Cards – Print

To print reminder cards for the clients found in your search:

- **Click the Cards radio button and check the options desired:**
- **Print only month and year for reminder dates: If checked, the day will not be specified for due dates. For example, 12/19 prints instead of 12/31/19.**
- **Print multiple pets on cards/letters: Check to combine patients in the same household on the same card. This reduces the number of cards needed. If unchecked, each patient gets an individual card. Eight due procedures fit on a multiple patient reminder card, four procedures on a single patient. Single patient cards allow more room for a text message.**
- **Exclude clients with email address: If checked, clients with email addresses receive emails instead of printed cards. Save paper and cards by sending communications by email when you can.**
- **Send email to those with email addresses: Check to send only an email.**
- **Send as card/letter and email: Check to send an email and a card.**
- **To change the already created (canned) text, click Edit.**
- **Make your changes and click Save.**

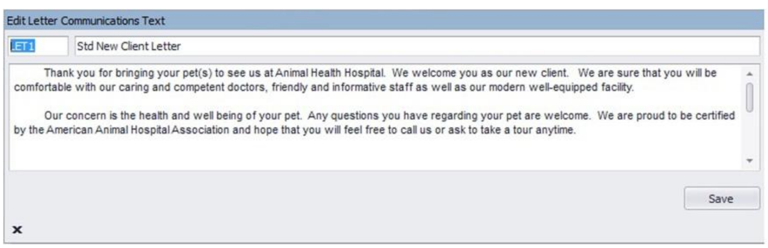


Click Print or Print / Process to send your cards to the default printer. If the option to send as email is selected, the email will also be sent when you click Print. A progress bar indicates that your cards are being printed.

Due Reminder Letters – Print

To print letters for the clients found in your result list:

- Click the Letters radio button and check the options desired:
- Print only month and year for reminder dates: If checked, the day will not be specified for due dates. For example, 12/19 prints instead of 12/31/19.
- Print multiple pets on reminder cards/letters: Check to combine patients in the same household on the same letter. This reduces the number of letters needed. If unchecked, each patient gets an individual letter.
- Exclude clients with email address: If checked, clients with email addresses receive emails instead of printed letters. Save paper by sending communications by email when you can.
- Send email to those with email addresses: Check to send only an email.
- Send as card/letter and email: Check to send an email and a letter.
- To change the already created (canned) text, click Edit.
- Make your changes and click Save.

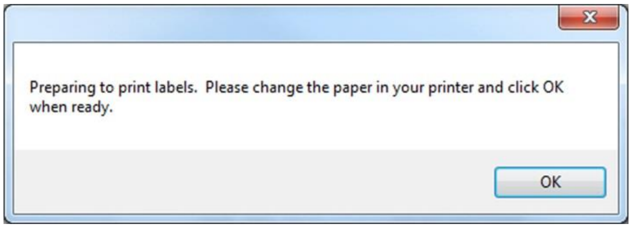


- Click Print or Print / Process to send your letters to the default printer. If the option to send as email is selected, the email will also be sent when you click Print. A progress bar indicates that your letters are being printed.

Due Reminder – Print Labels

To print mailing labels on Avery laser labels (5161 or 5261) for clients found in your list:

- Click the Print Labels tab and check the options desired:
- Exclude clients with email address: If checked, clients with email do not have labels printed.
- Click Print to send your labels to the default printer. A progress bar indicates that your labels are being printed.



Due Reminders – Export Result List

To export your Result List for use with a third-party application, for online reminders or Word:

To remove a contact from the Result List print or export:

- Uncheck the box on the left. This will omit them from the Print / Process or Export.

You can go to the client's account from this location.

- Right-click and select Open Selected Client.

To Export:

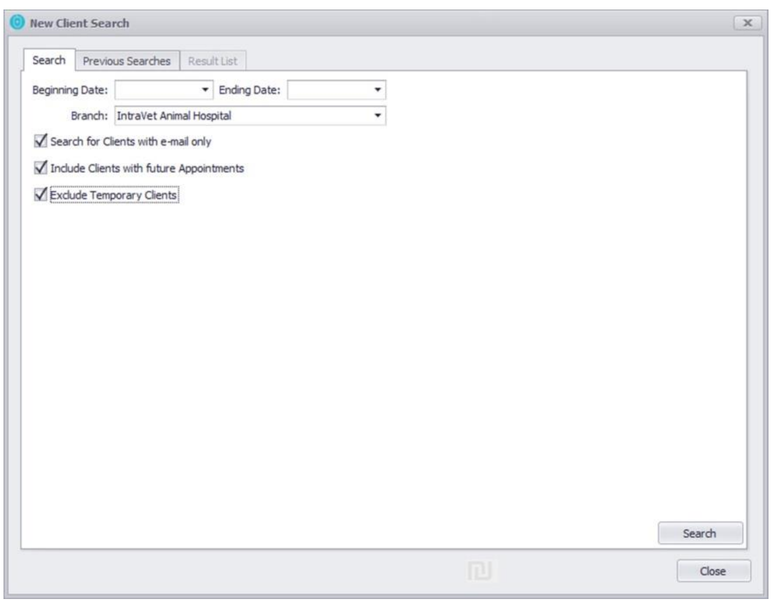
- Select the Export tab.
- Place a check in the Patient checkbox in the Patient Section to activate the option for Number of patients, One record per Client and One record per Patient. If a client has more than one patient matching your search criteria, you may want to send only one card, letter or email.
- If exporting patient information, enter the Number of patients per Client to include (maximum is 9).
- If exporting client information, click to highlight each client field (far left pane) to export.
- Select one record per Client or One record per Patient.
- Place a check in the Codes checkbox in the Codes section to activate the option for Number of Codes.
- If you want to export codes, enter the Number of Codes.
- Highlight the code information to be included.
- Click the Export button. A Save As window appears.
- Navigate to the location where you want to save your exported record and name your file.
- Save as Type: Choose the file type you want to save it as. You can export it as Delimited text, Excel, XML, or Healthy Pet (encoded for use with *Healthy Pet* magazine).
- Click Save.

New Client Search

Search for new clients who were entered into IntraVet within a date range.

- From the IntraVet Menu Bar, select Communications | New Client Search.

- Enter a Beginning and Ending Date range. You can also select the down-arrow to make your choice from a calendar.
- Select a Branch or All Branches.
- Check all that apply:
  - Search for Clients with email only: Check to include only those clients with email addresses for an email only recall.
  - Include Clients with future Appointments: Check to include clients with future appointments.
  - Exclude Temporary Clients: Check to exclude new clients who have no activity (visits or invoices) entered in the system.
- Click Search. A progress bar indicates the search status.



New Client Search – Result List

When your search is complete, the Result List populates. These are clients matching your search criteria.

You can edit the list before sending emails, cards, letters or exporting.

To remove a contact from the Result List print or export:

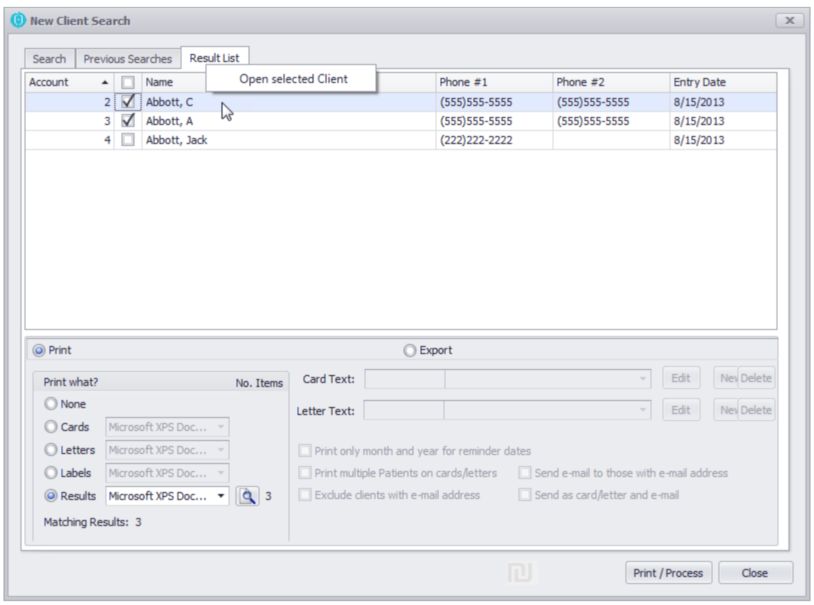
- Uncheck the box on the left. This will omit them from the Print/Process or Export.

You can go to the client's account from this location.

- Right-click and select Open Selected Client.

To print the Result List:

- Click the Print radio button. This will display the number of Matching Results.
- Click the Results radio button under Print what?
- Click Print / Process in the lower right corner of the Result List window.

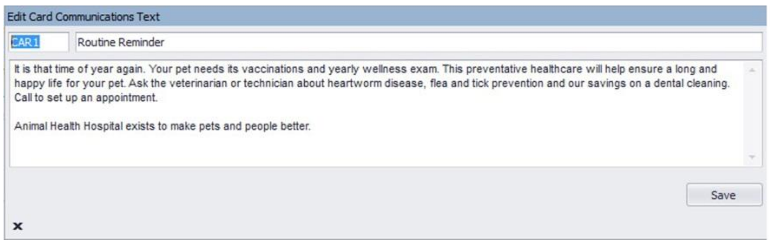


New Client Search – Print Cards

To print cards for new clients found in your search:

- Click the Cards radio button and check the options desired:
  - Enter Card Text or use the down-arrow to select from the canned text.
  - Print only month and year for reminder dates: If checked, the day will not be specified for due dates. For example, 12/19 prints instead of 12/31/19.
  - Print multiple pets on cards/letters: Check to combine patients in the same household on the same card. This reduces the number of cards needed. If unchecked, each patient gets an individual card. Eight due procedures fit on a multiple patient reminder card, four procedures on a single patient. Single patient cards allow more room for a text message.

- Exclude clients with email address: If checked, clients with email addresses receive emails instead of printed cards. Save paper and cards by sending communications by email when you can.
- Send email to those with email addresses: Check to send only an email.
- Send as card/letter and email: Check to send an email and a card.
- To change the already created (canned) text, click Edit.
- Make your changes and click Save.

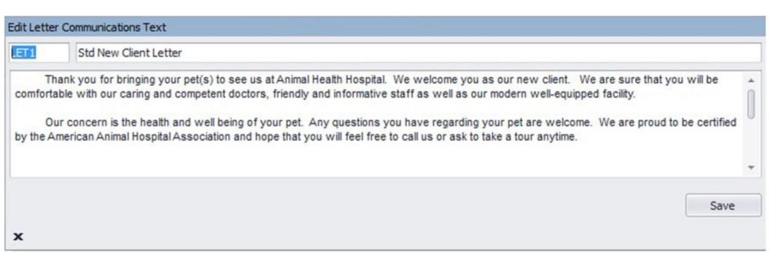


- Click Print / Process to send your cards to the default printer. If the option to send as email is selected, the email will also be sent when you click Print. A progress bar indicates that your cards are being printed.

New Client Search – Print Letters

To print New Client letters for clients found in your search:

- Click the Letters radio button and check the options desired:
  - Enter Letter Text or use the down-arrow to select from the canned text.
  - Print only month and year for reminder dates: If checked, the day will not be specified for due dates. For example, 12/19 prints instead of 12/31/19.
  - Print multiple pets on reminder cards/letters: Check to combine patients in the same household on the same letter. This reduces the number of letters needed. If unchecked, each patient gets an individual letter.
  - Exclude clients with email address: If checked, clients with email addresses receive emails instead of printed letters. Save paper by sending communications by email when you can.
  - Send email to those with email addresses: Check to send only an email.
  - Send as card/letter and email: Check to send an email and a letter.
  - To change the already created (canned) text, click Edit.
  - Make your changes and click Save.

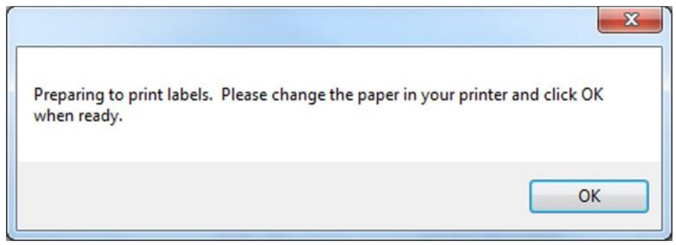


- Click Print / Process to send your letters to the default printer. If the option to send as email is selected, the email will also be sent when you click Print. A progress bar indicates that your letters are being printed.

New Client Search – Print Labels

To print mailing labels on Avery laser labels (5161 or 5261) for clients found in your list:

- Click the Print Labels tab and check the options desired:
    - Exclude clients with email address: If checked, clients with email do not have labels printed.
    - Click Print to send your labels to the default printer. A progress bar indicates that your labels are being printed.



New Client Search – Export Result List

To export your Result List for use with a third-party application, for online reminders or Word:

To remove a contact from the Result List print or export:

- Uncheck the box on the left. This will omit them from the Print/Process or Export.

You can go to the client's account from this location.

- Right-click and select Open Selected Client.

To Export:

- Select the Export tab.
- Place a check in the Patient checkbox in the Patient Section to activate the option for Number of patients, One record per Client and One record per Patient. If a client has more than one patient matching your search criteria, you may want to send only one card, letter or email.
- If exporting patient information, enter the Number of patients per Client to include (maximum is 9).
- If exporting patient information, click to highlight each Patient field to export.
- Select One record per Client or One record per Patient.
- Click to highlight each Client field you want to export.
- Click the Export button. A Save As window appears.
- Navigate to the location where you want to save your exported record and name your file.

- Save as Type: Choose the file type you want to save it as. You can export it as Delimited text, Excel, XML, or Healthy Pet (encoded for use with *Healthy Pet* magazine).
- Click Save.

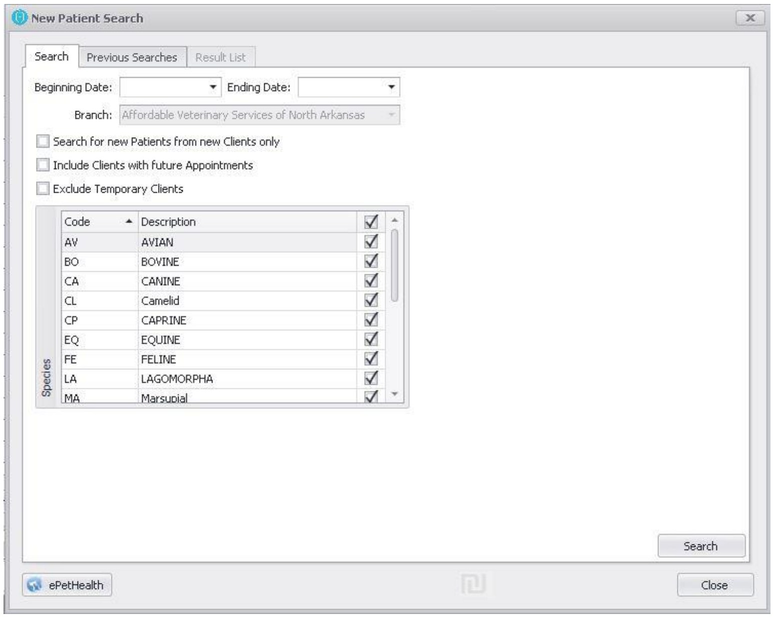
New Patient Search

Search for new patients to your practice and send them newsletters, welcome packets, or discounts for wellness packages.

- From the IntraVet Menu Bar, select Communications | New Patient Search.

- Enter a Beginning and Ending Date range. You can also select the down-arrow to make your choice from a calendar.
- Branch: Choose a branch to search patients from that branch only, or select all branches.
- Search for new Patients from new Clients only: When checked, only new clients will be searched; otherwise, an existing client who has brought in a new patient will be included in the search.
- Include Clients with future Appointments: Check to include clients with future appointments.
- Exclude Temporary Clients: Check to exclude new clients who have no activity (visits or invoices) entered in the system.
- All Species are selected by default.

  If you want to include only certain species:
- Uncheck a box to remove that species. Leave a check for only the species you want to include.
- If you want only one (or a few species), it is quicker to exclude all species by removing the check in the checkbox next to Description. Proceed to check the species you do want.
- Click Search. A progress bar indicates that your search is in progress.



A Result List appears.

If you are logged into ePetHealth and select the ePetHealth button within the New Patient Search, the ePetHealth Birthday Cards setup page will open in your web browser.

New Patient – Result List

When your search is complete, the Result List populates. These are patients and clients matching your search criteria. You can edit or research this list before sending emails, cards, letters or exporting records.

To remove a contact from the Result List print or export:

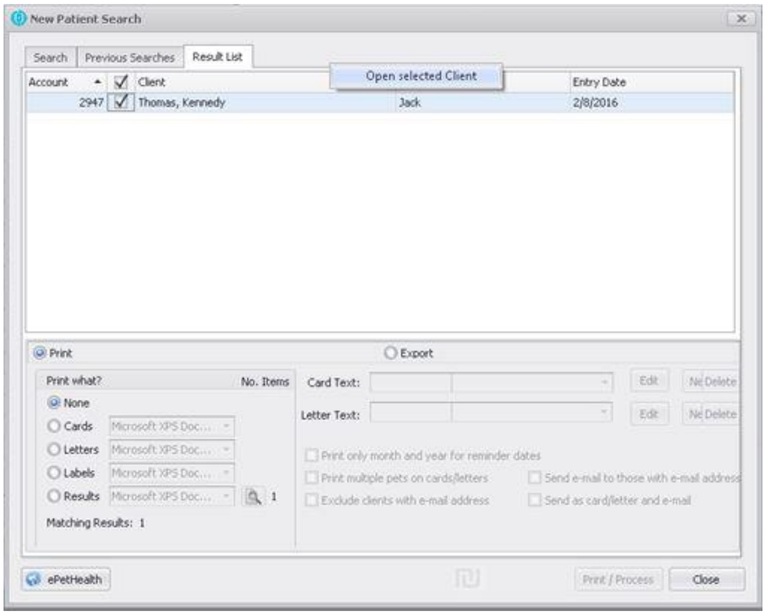
- Uncheck the box on the left. This will omit them from the Print / Process or Export.

You can go to the client's account from this location.

- Right-click and select Open selected Client.

To print the Result List:

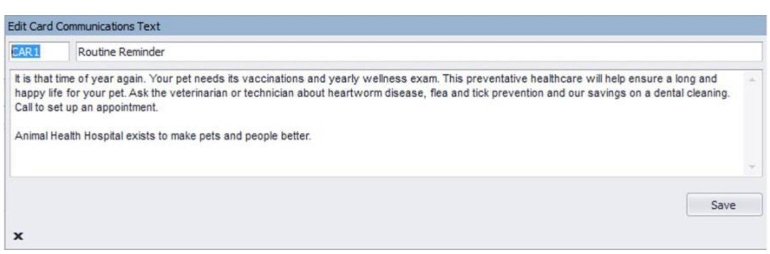
- Click the Print radio button. This will display the number of Matching Results.
- Click the Results radio button under Print what?
- Click Print / Process in the lower right corner of the Result List window.



New Patient – Print Cards

To print New Patient cards for clients found in your search:

- Click the Cards radio button and check the options desired:
    - Enter the Card Text or use the down-arrow to select from the canned text.
    - Print only month and year for reminder dates: If checked, the day will not be specified for due dates. For example, 12/19 prints instead of 12/31/19.
    - Print multiple pets on cards/letters: Check to combine patients in the same household on the same card. This reduces the number of cards needed. If unchecked, each patient gets an individual card. Eight due procedures fit on a multiple patient reminder card, four procedures on a single patient. Single patient cards allow more room for a text message.
    - Exclude clients with email address: If checked, clients with email addresses receive emails instead of printed cards. Save paper and cards by sending communications by email when you can.
    - Send email to those with email addresses: Check to send only an email.
    - Send as card/letter and email: Check to send an email and a card.
    - To change the already created (canned) text, click Edit.
    - Make your changes and click Save.

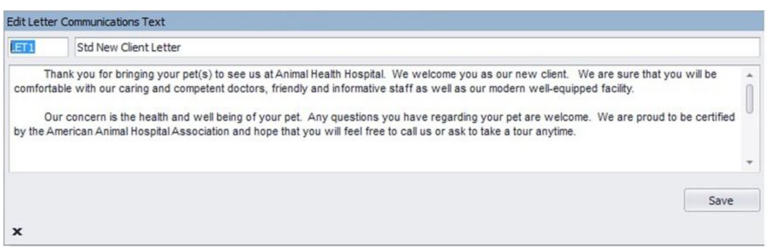


- Click Print/Process to send your cards to the default printer. If the option to send as email is selected, the email will also be sent when you click Print. A progress bar indicates that your cards are being printed.

New Patient – Print Letters

To print New Patient letters for clients found in your search:

- Click the Letters radio button and check the options desired:
    - Enter Letter Text or use the down-arrow to select from the canned text.
    - Print only month and year for reminder dates: If checked, the day will not be specified for due dates. For example, 12/19 prints instead of 12/31/19.
    - Print multiple pets on reminder cards/letters: Check to combine patients in the same household on the same letter. This reduces the number of letters needed. If unchecked, each patient gets an individual letter.
    - Exclude clients with email address: If checked, clients with email addresses receive emails instead of printed letters. Save paper by sending communications by email when you can.
    - Send email to those with email addresses: Check to send only an email.
    - Send as card/letter and email: Check to send an email and a letter.
    - To change the already created (canned) text, click Edit.
    - Make your changes and click Save.

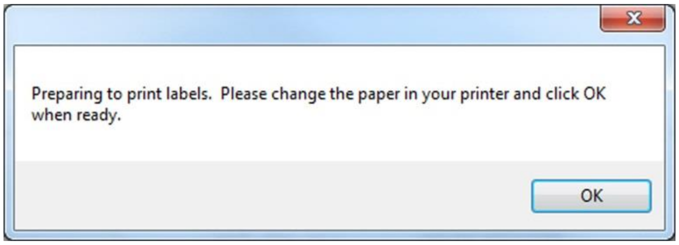


- Click Print / Process to send your letters to the default printer. If the option to send as email is selected, the email will also be sent when you click Print. A progress bar indicates that your letters are being printed.

New Patient – Print Labels

To print mailing labels on Avery laser labels (5161 or 5261) for clients found in your list:

- Click the Print Labels tab and check the options desired:
    - Exclude clients with email address: If checked, clients with email do not have labels printed.
    - Click Print to send your labels to the default printer. A progress bar indicates that your labels are being printed.



New Patient – Export Result List

To export your Result List for use with a third-party application, for online reminders or Word:

To remove a contact from the Result List print or export:

- Uncheck the box on the left. This will omit them from the Print/Process or Export.

You can go to the client's account from this location.

- Right-click and select Open selected Client.

To Export:

- Select the Export tab.
- Place a check in the Patient checkbox in the Patient Section to activate the option for Number of patients, One record per Client and One record per Patient. If a client has more than one patient matching your search criteria, you may want to send only one card, letter or email.

To export patient information:

  - Enter the Number of patients per Client to include (maximum is 9).
  - Click to highlight each Patient field to export.
  - Select One record per Client or One record per Patient.
  - Click to highlight each Patient field you want to export.
- Click the Export button. A Save As window appears.
- Navigate to the location where you want to save your exported record and name your file.
- Save as Type: Choose the file type you want to save it as. You can export it as Delimited text, Excel, XML, or Healthy Pet (encoded for use with *Healthy Pet* magazine).
- Click Save.

Recall Generator

The Recall Generator is used to search for client and patients. You can narrow your search by entering multiple criteria to various characteristics of the Client, Patient, Patient History and some General Options.

For example, you can use the recall generator to send an email to your clients with an email address or if you would like to print a list or send a postcard to all canine patients for dental month.

How to Search using the Recall Generator Search:

- From the IntraVet Menu Bar, select Communications | Recall Generator Search.

<u>Client Section</u>

- Select your search parameters from the Client section. Begin by clicking on the down-arrow next to a field; then, double-click on your choice. This puts your choice in the field.
- Next, select the plus sign (+) corresponding to your selected parameter. This adds your selection to the search pane on the right.
    a. Classification: typically used as financial indicators on an account (Cash Only, Collections, Bad Check passed, Employee, etc.) Located under Setup | General Codes | of Client | Classification. Classifications can be included or excluded from a search.
    b. Search Codes: typically used to identify groups of clients (Senior Citizen, Grooming Client, Breeder, Employee, etc.), Search Codes can be included or excluded from a search.
    c. No. of Patients: Choices are Equal to, Less than or equal to, Greater than or equal to, or between.
        - Enter the corresponding number(s) in the box(es) to the right.
    d. City: Where the client/patient resides.
    e. Zip Code: Where the client/patient resides.
    f. Balance Due: Choices are Equal to, Less than or equal to, Greater than or equal to, or Between.
        - Enter the corresponding number(s) in the box(es) to the right.
        - YTD Services: typically used to contact those clients who spend a certain amount of money within your practice. Choices are Equal to, Less than or equal to, Greater than or equal to, or Between.
        - Enter the corresponding number(s) in the box(es) to the right.
        - Discount %: typically used to find those clients who have a certain discount %. Choices are Equal to, Less than or equal to, Greater than or equal to, or Between.
        - Enter the corresponding number(s) in the box(es) to the right.
        - Branch: Click the down-arrow to make your selection.
- Choose Match ALL or Match ANY client parameters.

<u>Patient Section</u>

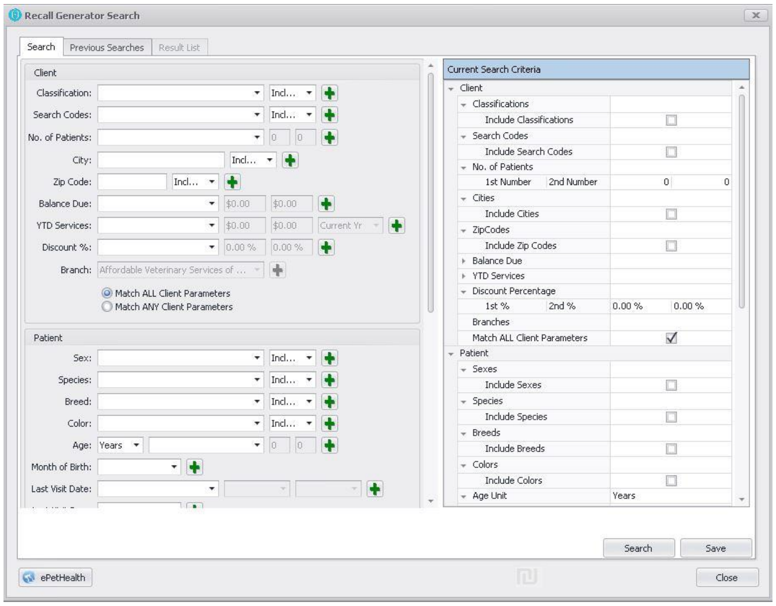
- Select your search parameters from the Patient section using the same procedure above.
    - Sex
    - Species
    - Breed
    - Color
    - Age
    - Month of Birth
    - Last Visit Date: Choose Equal to, Less than or equal to, Greater than or equal to, or Between.
    - Last Visit Provider
    - Referring Provider
    - Stable
    - Status
        a. Status Date: Choices are Equal to, Less than or equal to, Greater than or equal to, or Between.
- Choose Match ALL or ANY patient parameters.
- When the plus sign (+) corresponding to your selected parameter is clicked, it will be added to the search pane on the right.

<u>History Section</u>

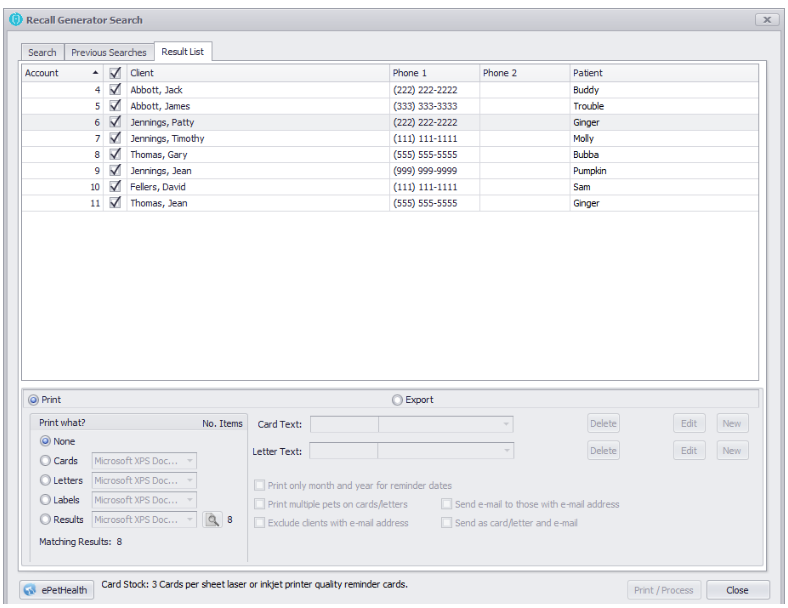
- Select your search parameters from the History section. Here you can find those patients who were invoiced with certain codes.
    a) To choose a procedure, enter a procedure code, or click in the blank entry line and select the desired procedure using the down-arrow.
    b) Select either Include or Exclude and a date range.
    c) Click the green plus sign (+) to add to the search pane.
    d) Choose Match ALL or ANY history parameters.
- Select your search parameters from the General Options section.

<u>General Options</u>

- Select your search parameters from the General Options section.
    - One record per Client
    - Clients With Email Only
    - Patients Not Receiving Reminders
    - Include Clients with future appointments
- When you are satisfied with the parameters, click Search.



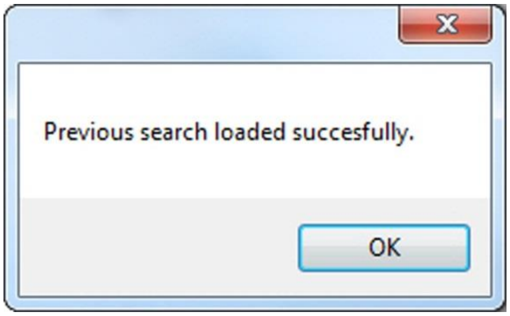
- A progress bar indicates that your search is in progress. When the search completes, the Result List appears.



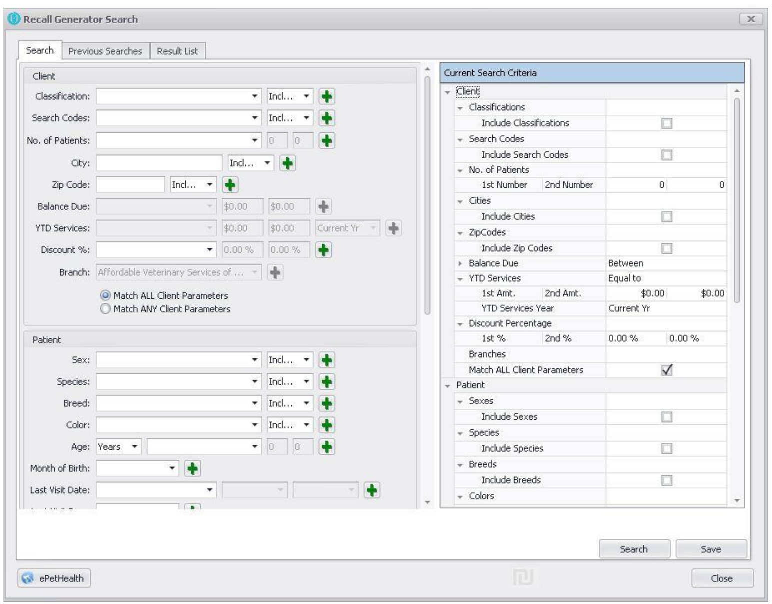
Recall Generator Search – Previous Searches

IntraVet saves the most recent search parameters for audit purposes and convenience so that you can reuse them. You may want to use the same search criteria several times. To load previous search parameters:

- Click the Previous Searches tab. The list of the most recent searches with date and time appears in the left column.
- Select a search to view its details to the right. Details include all parameters chosen for the search.
- Double-click on the search you want to reuse, or click once to highlight and click Load. Screen will pop up to tell you the Previous search has loaded successfully.



- Click OK. This will take you to the Search screen. All the parameters are reloaded in the search screen.
- Edit Client and Patient information as necessary.
- Click Search.



Result List will open.

Recall Generator Search – Result List

When your search is complete, the Result List populates. These are patients and clients matching your search criteria. You can edit or research this list before sending emails, cards, letters or exports.

To remove a contact from the Result List print or export:

- Uncheck the box on the left. This will omit them from the Print/Process or Export.

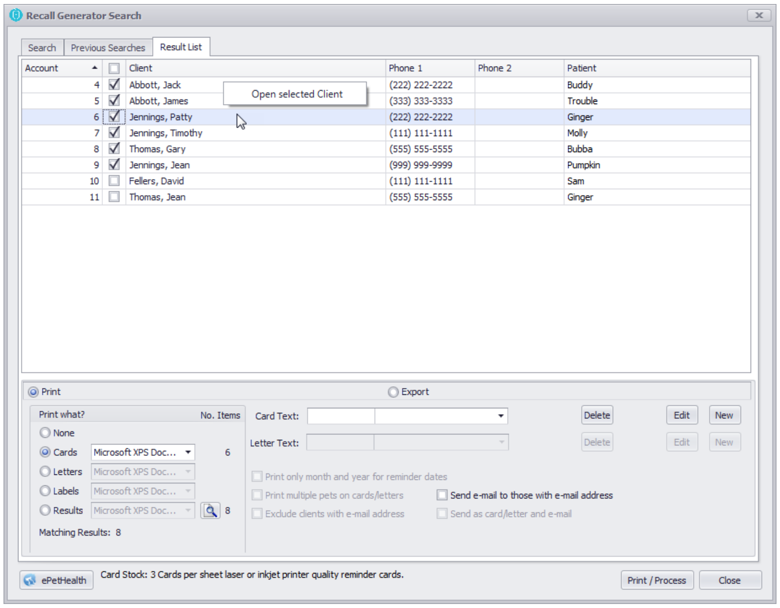
You can go to the client's account from this location.

- Right-click and select Open selected Client.

To Print the Result List:

- Click the Print radio button. This will display the number of Matching Results.
- Click the Results radio button under Print what?

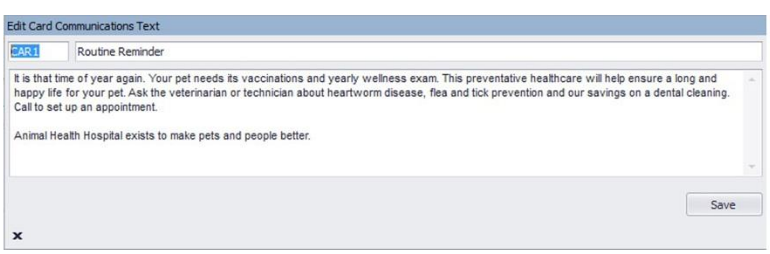
- Click Print / Process in the lower right corner of the Result List window.



Recall Generator Search – Print Cards

To print reminder cards for the clients found in your search:

- Click the Cards radio button and check the options desired:
  a. Print only month and year for reminder dates: If checked, the day will not be specified for due dates. For example, 12/19 prints instead of 12/31/19.
  b. Print multiple pets on cards/letters: Check to combine patients in the same household on the same card. This reduces the number of cards needed. If unchecked, each patient gets an individual card. Eight due procedures fit on a multiple patient reminder card, four procedures on a single patient. Single patient cards allow more room for a text message.
  c. Exclude clients with email address: If checked, clients with email addresses receive emails instead of printed cards. Save paper and cards by sending communications by email when you can.
  d. Send email to those with email addresses: Check to send only an email.
  e. Send as card/letter and email: Check to send an email and a card.
  f. To change the already created (canned) text, click Edit.
  g. Make your changes and click Save.

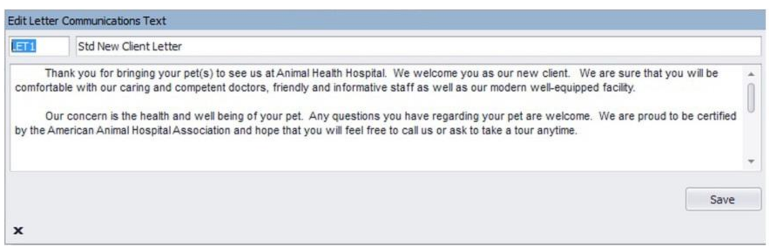


- Click Print/Process to send your cards to the default printer. If the option to send as email is selected, the email will also be sent when you click Print. A progress bar indicates that your cards are being printed.

Recall Generator Search – Print Letters

To print letters for clients found in your search:

- Click the Letters radio button and check the options desired:
  a. Print only month and year for reminder dates: If checked, the day will not be specified for due dates. For example, 12/19 prints instead of 12/31/19.
  b. Print multiple pets on reminder cards/letters: Check to combine patients in the same household on the same letter. This reduces the number of letters needed. If unchecked, each patient gets an individual letter.
  c. Exclude clients with email address: If checked, clients with email addresses receive emails instead of printed letters. Save paper by sending communications by email when you can.
  d. Send email to those with email addresses: Check to send only an email.
  e. Send as card/letter and email: Check to send an email and a letter.
  f. To change the already created (canned) text, click Edit.
  g. Make your changes and click Save.

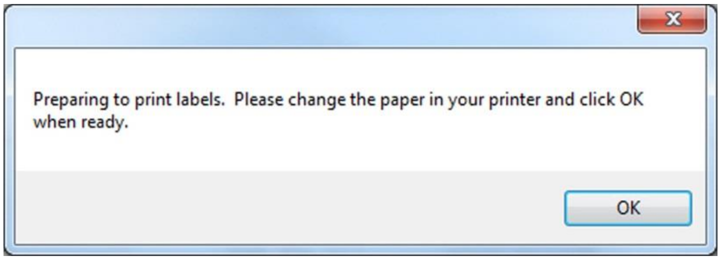


- Click Print to send your letters to the default printer. If the option to send as email is selected, the email will also be sent when you click Print. A progress bar indicates that your letters are being printed.

Recall Generator Search – Print Labels

To print mailing labels on Avery laser labels (5161 or 5261) for clients found in your list:

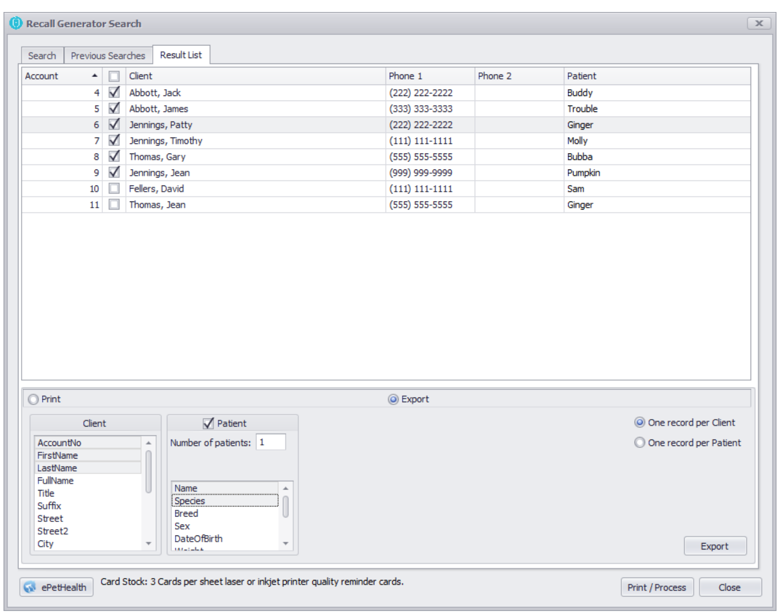
- Click the Print Labels tab and check the options desired:
  a. Exclude clients with email address: If checked, clients with email do not have labels printed.
  b. Click Print to send your labels to the default printer. A progress bar indicates that your labels are being printed.



Recall Generator Search – Export Result List

To export your Result List for use with a third-party application, for online reminders or Word:

- Select the Export tab.
- Place a check in the Patient checkbox in the Patient Section to activate the option for Number of patients, One record per Client and One record per Patient. If a client has more than one patient matching your search criteria, you may want to send only one card, letter or email.
- If exporting patient information, enter the Number of patients per Client to include (maximum is 9).
- Click to highlight each Patient field to export.
- Click to highlight each Client field to export.
- Select One record per Client or One record per Patient.
- Click the Export button. A Save As window appears.
- Navigate to the location where you want to save your exported record and name your file.
- Save as Type: Choose the file type you want to save it as. You can export it as Delimited text, Excel, XML, or Healthy Pet (encoded for use with *Healthy Pet* magazine).
- Click Save.



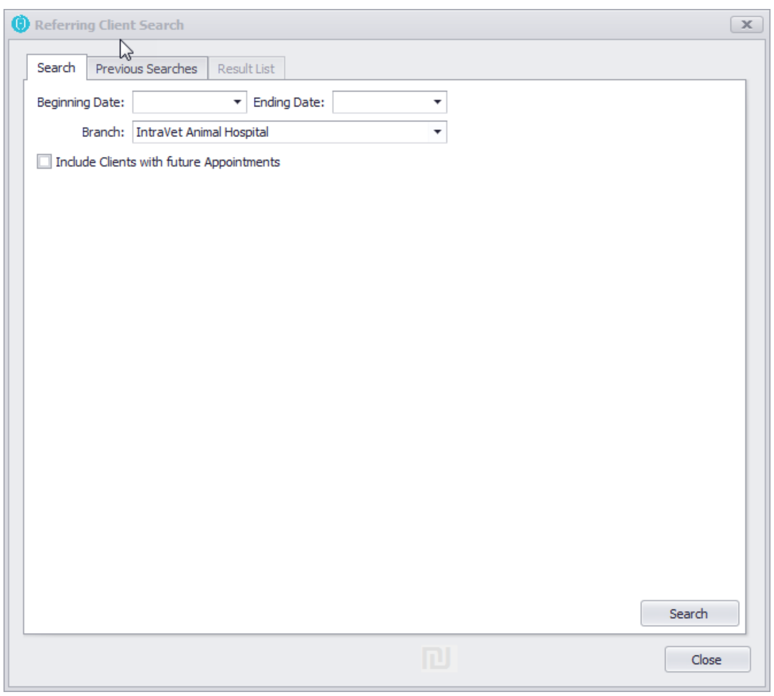
Referring Clients Search

When you enter new client information, you can opt to select a referring client. This search will find referring clients. Once the search is completed, you can print appreciation cards or letters to referring clients.

How to Search Using Referring Client Search

- From the IntraVet Menu Bar, select Communications | Referring Clients Search.

- Enter the Beginning and Ending Date range. The date that the computer is searching is the entry date of the client that was referred. You can also select the down-arrow to make your choice from a calendar.
- Select the branch you want to search or choose All Branches.
- To Include Clients with future Appointments, check the corresponding box.
- Click Search. A progress bar indicates that your search is in progress.



Referring Client Search – Result List

When your search is complete, the Result List populates. These are patients and clients matching your search criteria. You can edit or research this list before sending emails, cards, letters or exports.

To remove a contact from the Result List:

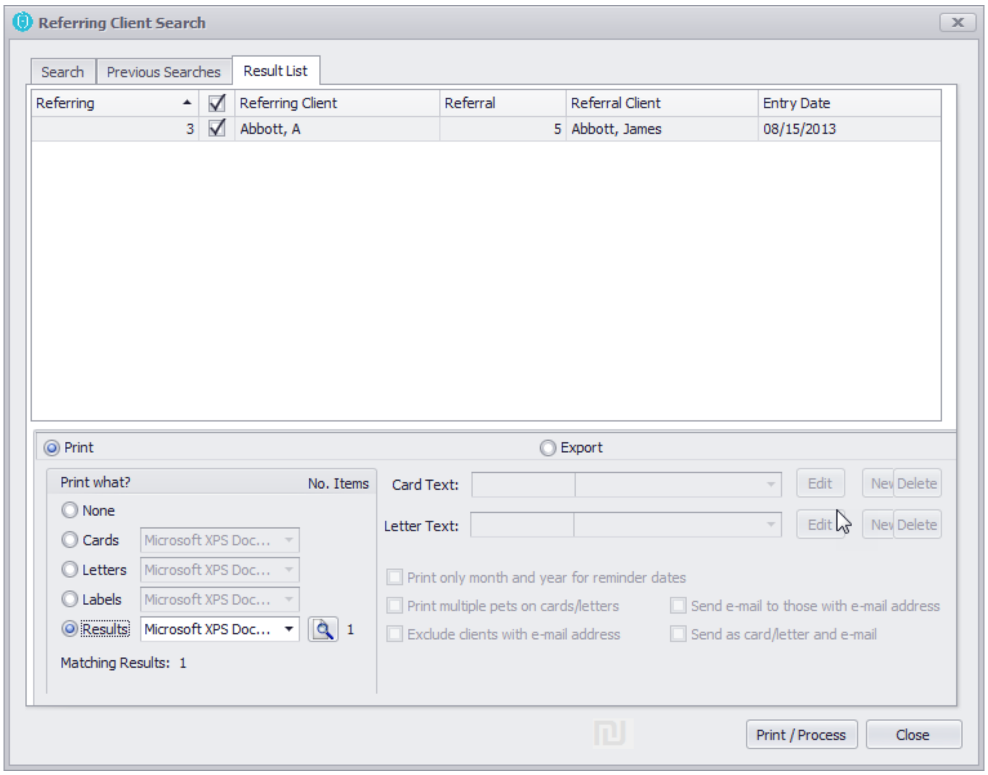
- Uncheck the box on the right. This will omit them from the Print / Process.

To print the Result List:

- Click Print/Process in the lower right corner of the Result List window.

You can also go to the client's account:

- Right-click and select Open selected Client.



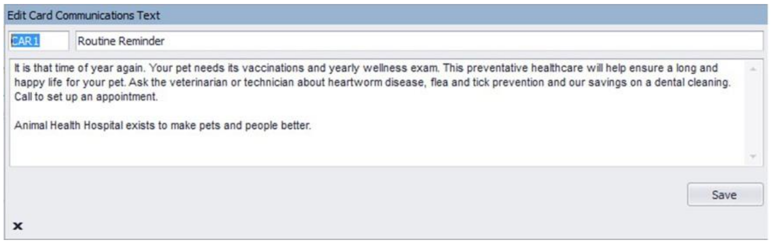
Referring Client Search – Print Cards

To print reminder cards for the clients found in your search:

- Click the Cards radio button and check the options desired:
    a. Print only month and year for reminder dates: If checked, the day will not be specified for due dates. For example, 12/19 prints instead of 12/31/19.
    b. Print multiple pets on cards/letters: Check to combine patients in the same household on the same card. This reduces the number of cards needed. If unchecked, each patient gets an individual card. Eight due procedures fit on a multiple patient reminder card, four procedures on a single patient. Single patient cards allow more room for a text message.
    c. Exclude clients with email address: If checked, clients with email addresses receive emails instead of printed cards. Save paper and cards by sending communications by email when you can.
    d. Send email to those with email addresses: Check to send only an email.
    e. Send as card/letter and email: Check to send an email and a card.

f. To change the already created (canned) text, click Edit.

g. Make your changes and click Save.



Referring Client Search – Print Letters

To print letters for clients found in your search:

- Click the Letters radio button and check the options desired:

    a. Print only month and year for reminder dates: If checked, the day will not be specified for due dates. For example, 12/19 prints instead of 12/31/19.

    b. Print multiple pets on reminder cards/letters: Check to combine patients in the same household on the same letter. This reduces the number of letters needed. If unchecked, each patient gets an individual letter.

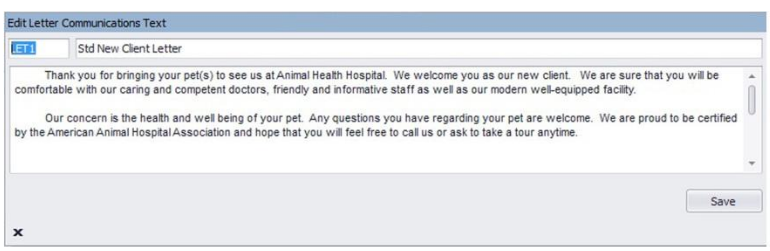
    c. Exclude clients with email address: If checked, clients with email addresses receive emails instead of printed letters. Save paper by sending communications by email when you can.

    d. Send email to those with email addresses: Check to send only an email.

    e. Send as card/letter and email: Check to send an email and a letter.

    f. To change the already created (canned) text, click Edit.

    g. Make your changes and click Save.



- Click Print to send your letters to the default printer. If the option to send as email is selected, the email will also be sent when you click Print. A progress bar indicates that your letters are being printed.

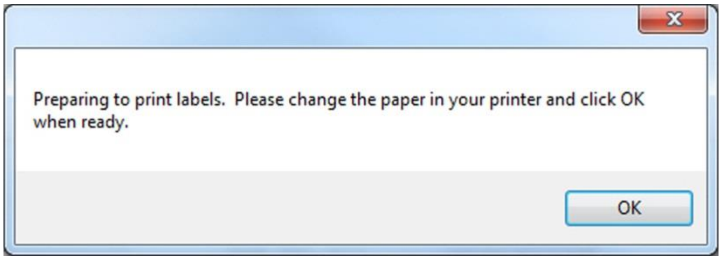
Referring Client Search – Print Labels

To print mailing labels on Avery laser labels (5161 or 5261) for clients found in your list:

- Click the Print Labels tab and check the options desired:

    a. Exclude clients with email address: If checked, clients with email do not have labels printed.

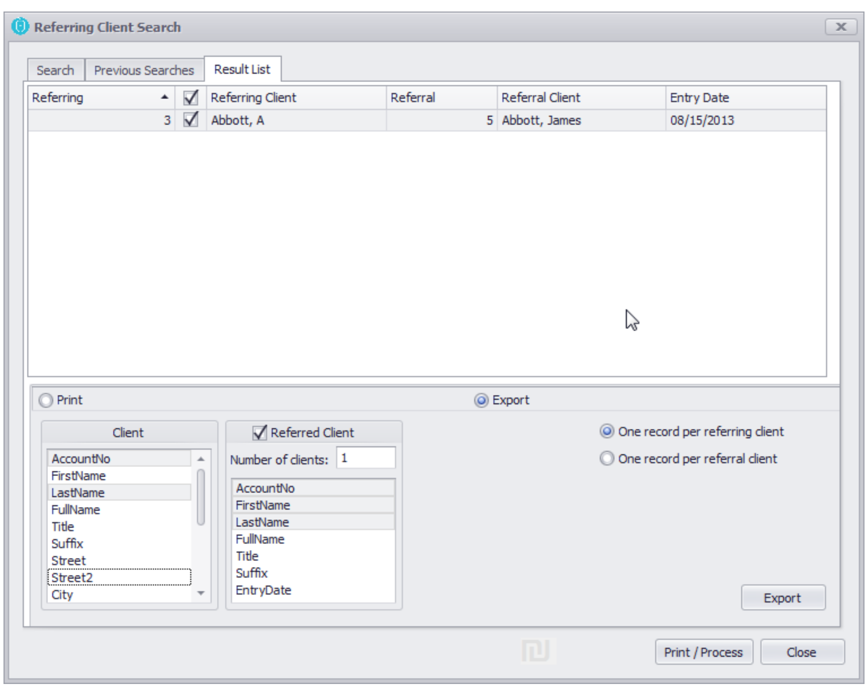
    b. Click Print to send your labels to the default printer. A progress bar indicates that your labels are being printed.



Referring Client Search – Export Result List

To export your Result List for use with a third-party application, for online reminders or Word:

- Select the Export tab.
- Place a check in the Referred Client checkbox to activate the option for Number of clients, One record per referring client and One record per referral client. If a client has more than one patient matching your search criteria, you may want to send only one card, letter or email.
- If exporting referred client information, enter the Number of clients (maximum is 9).
- Click to highlight each Referred Client field to export.
- If exporting client information, click to highlight each Client field to export.
- Select One record per referring client or One record per referral client.
- Click the Export button. A Save As window appears.
- Navigate to the location where you want to save your exported record and name your file.
- Save as Type: Choose the file type you want to save it as. You can export it as Delimited text, Excel, XML, or Healthy Pet (encoded for use with *Healthy Pet* magazine).
- Click Save.

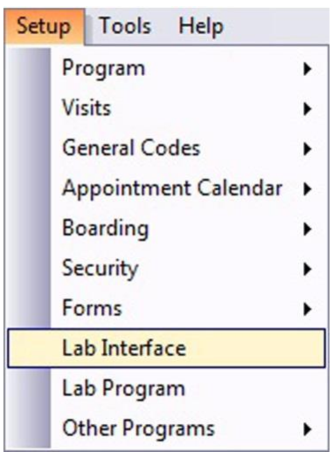


Lab Installation, Integration and Test Results

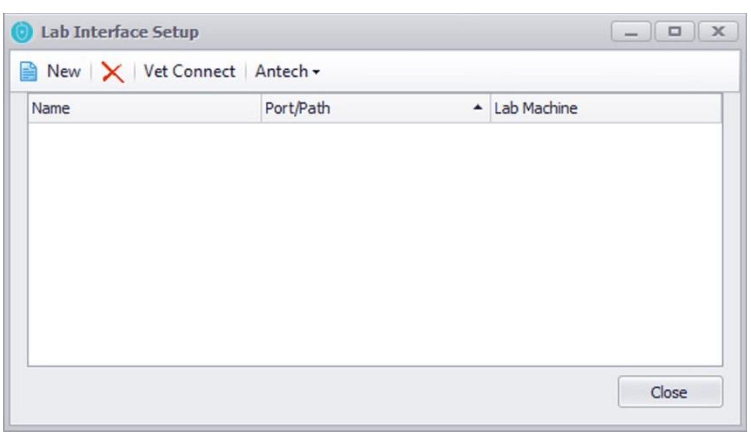
Lab Installation Instructions

Lab Integration

- From the IntraVet Menu Bar, select Setup | Lab Interface.



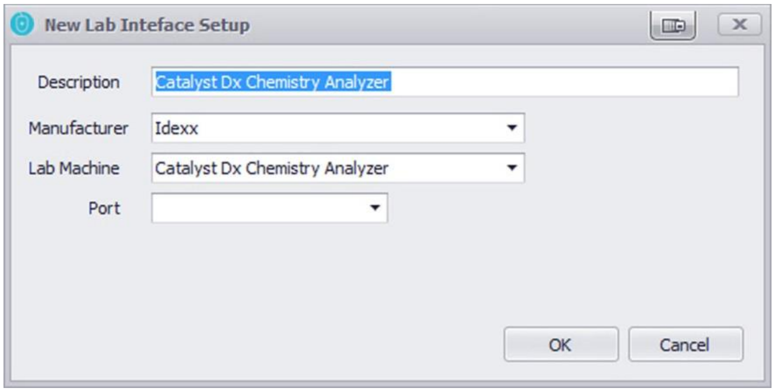
- Click New.



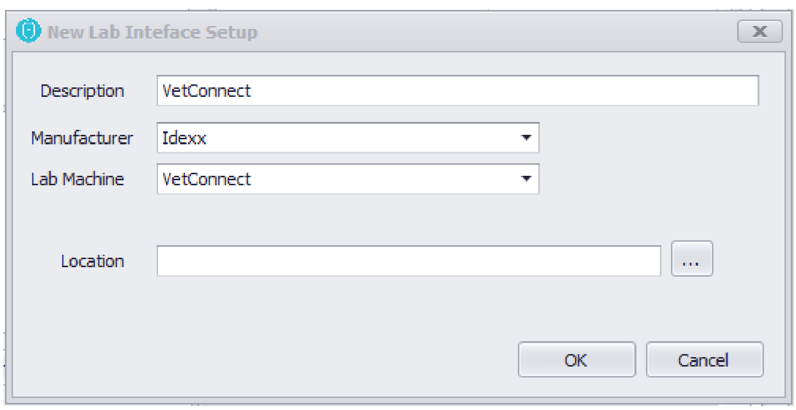
- Select the Manufacturer.
- Select a Lab Machine. This will fill in the Description.

All the machines set up within IntraVet will be listed. You can have more than one of the same type of lab machine. Change the description to reflect the name of the room in which the machine is located to distinguish between them.

- Select a Port or Location.
- Click OK.

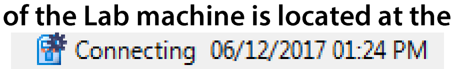


- If you select Location, use the  ellipsis button to navigate to the folder where the files are stored.

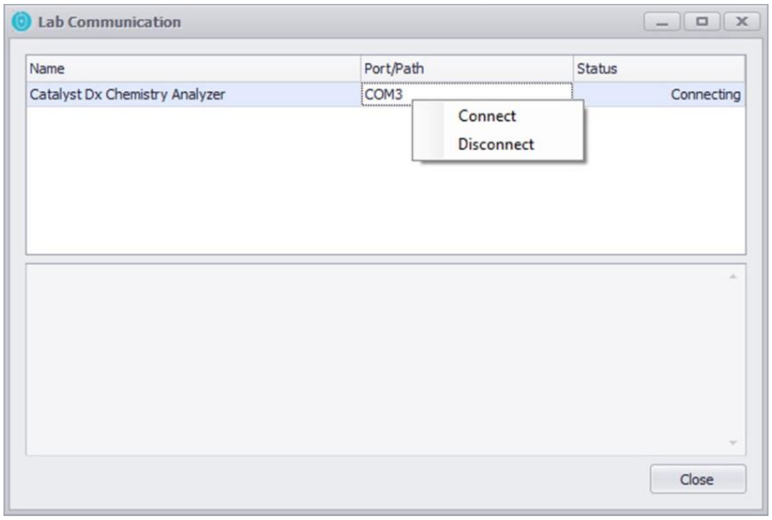


- Click OK.

The status of the Lab machine is located at the bottom right of the screen.



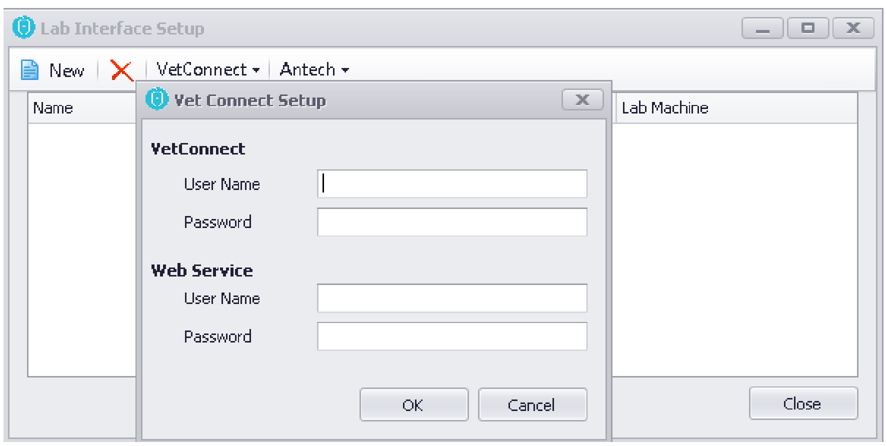
- Double-click on this status to bring up the Lab communication screen, which gives the name, the Path/Port and the status.
- Right-click in the Port to connect or disconnect.



This feature is used to troubleshoot connectivity issues. If it says "Connected," that means the lab machine will be able to import results within the IntraVet Lab Results feature.

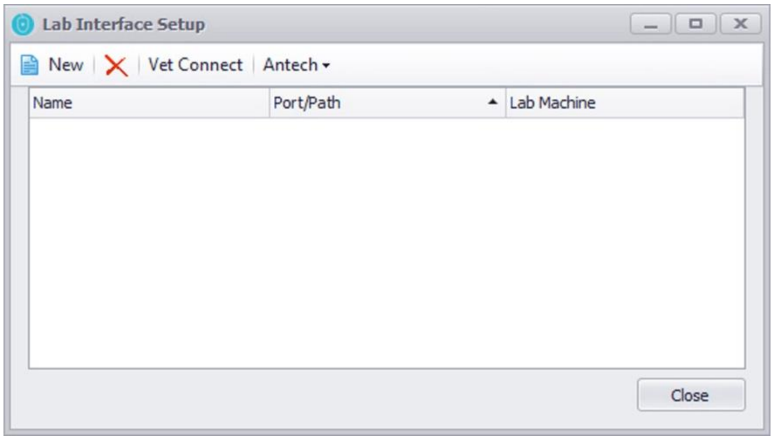
VetConnect Integration

- Select **Vet Connect** and enter your **User Name** and **Password**.
- Click **OK.**

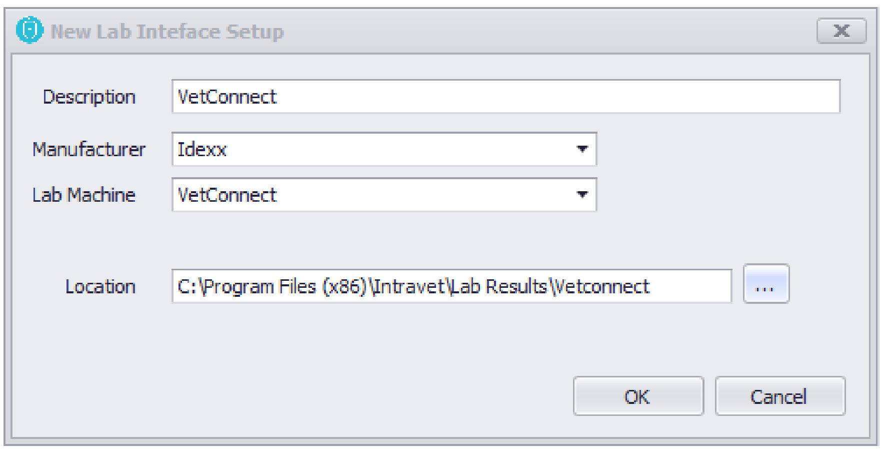


The VetConnect username and password will need the username and password that is used to log into the VetConnect website. The Web Service username and password will need the vcagent username and password. Both are provided by Idexx.

- Click **New**.



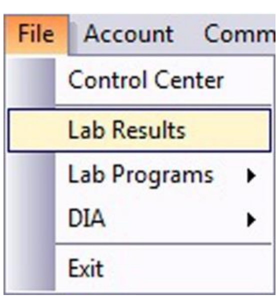
- Select **Idexx** in the Manufacturer drop-down list.
- Click the drop-down to select the **Port**.
- Click **OK**.



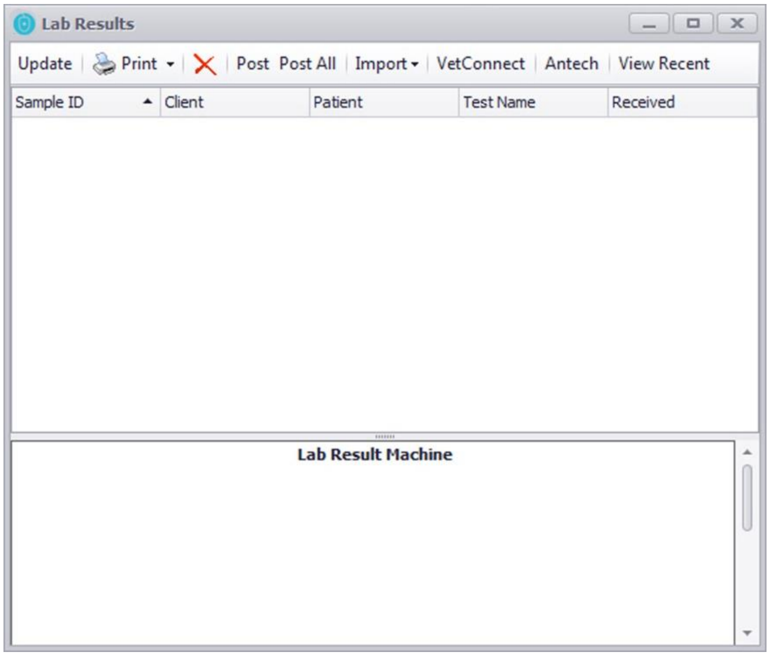
- You must type the path to a folder within the Lab Results folder as shown in the screenshot. For example, C:\Program Files (x86)\IntraVet\Lab Results**VetConnect**

To view Lab Results for VetConnect:

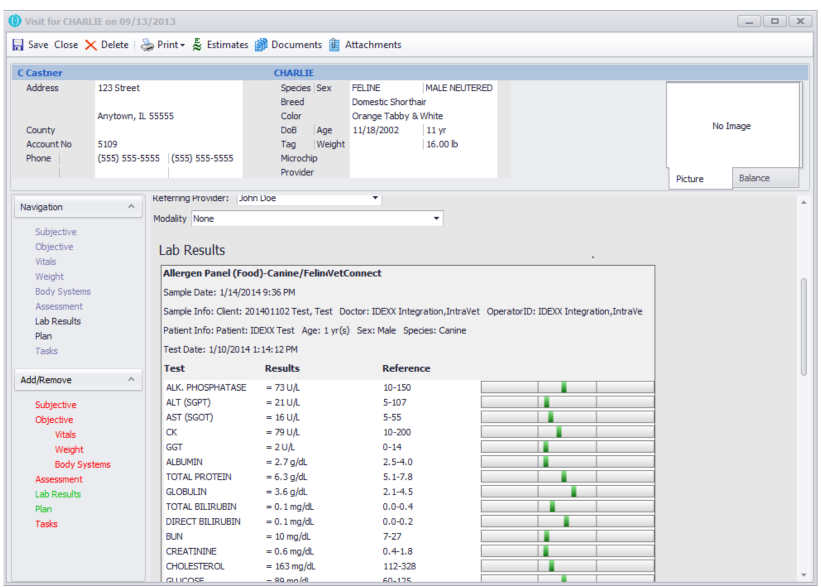
- From the IntraVet Menu Bar, select **File | Lab Results**.



- Click VetConnect.



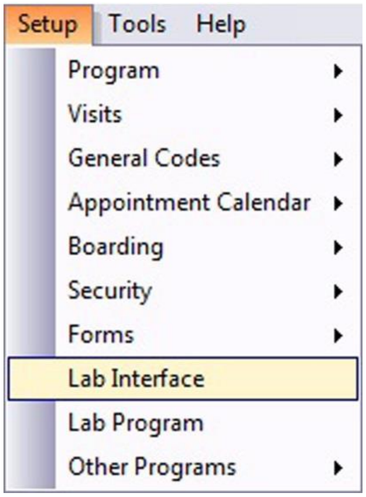
- If a record doesn't automatically post to a client and patient, highlight the lab and select **Update**.
- Enter the correct client and patient.
- Click **OK** to post to the account.



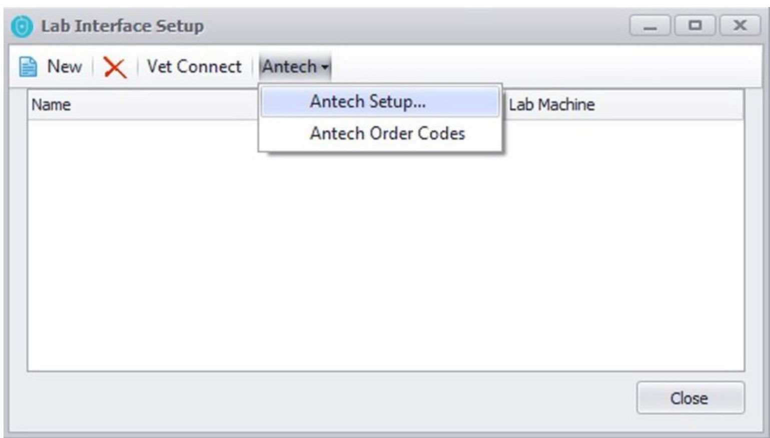
Antech/Zoasis Lab Interface Setup

The integration with IntraVet allows the system to generate requisition forms with barcodes that can be included with the lab sample for better accuracy in requested labs, as well as client/patient information. Practice procedure codes can be linked, for certain tests, to Antech's lab codes.

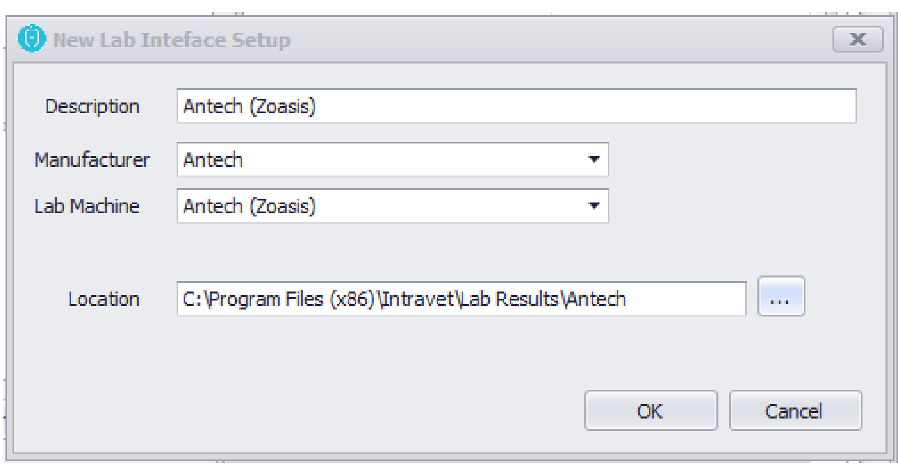
- From the IntraVet Menu Bar, select **Setup | Lab Interface**.



- Select Antech | Antech Setup.



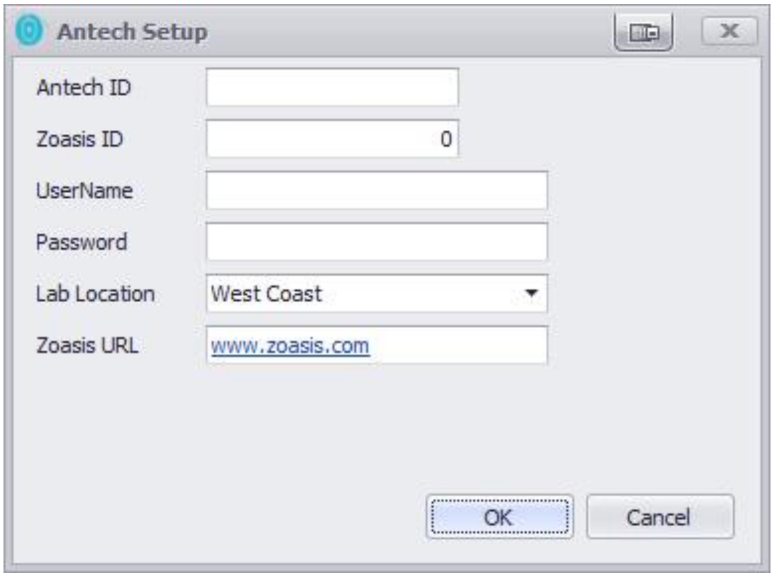
- Enter the Antech ID, Zoasis ID, UserName and Password.
- Click the down-arrow or double-click in the empty field to select the Lab Location.



You must type the path to a folder within the Lab Results folder as shown in the screenshot. For example, C:\Program Files (x86)\IntraVet\Lab Results\Antech

- Click **OK**.

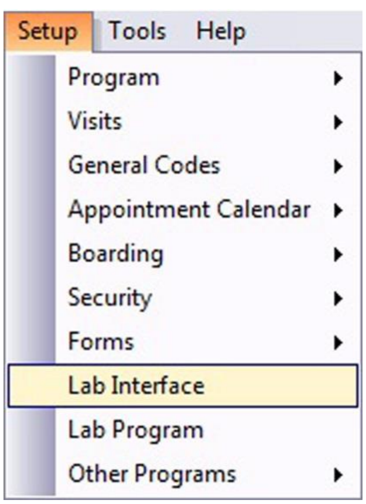
This information is provided by Antech. You can register with Antech at www.zoasis.com.



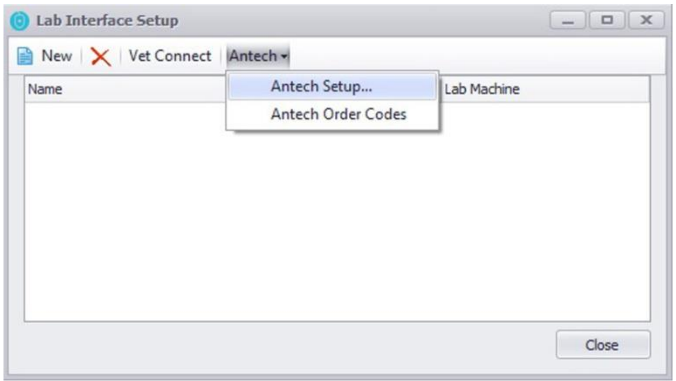
Antech Order Code Association

From the Antech Order Code List, you can create, edit, inactivate, and reactivate codes. You can also select from predefined Antech codes.   Procedure Codes can be selected to associate with the Antech order code.

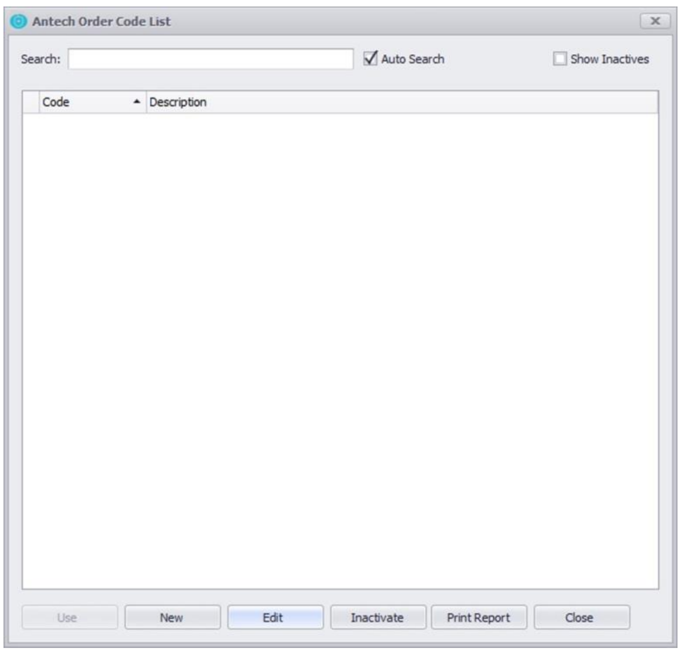
- From the IntraVet Menu Bar, select **Setup | Lab Interface**.



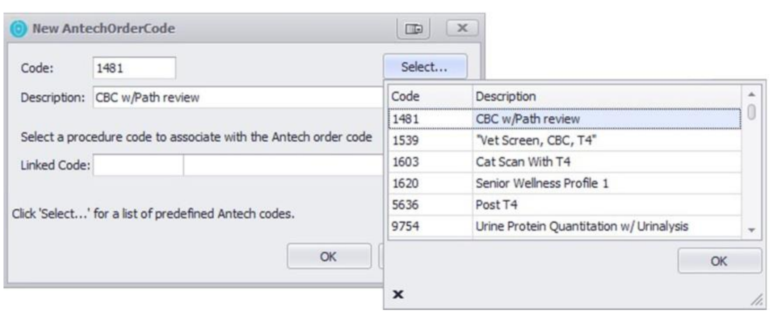
- Select Antech | Antech Order Codes.



- Click **New**.



- Click **Select**.

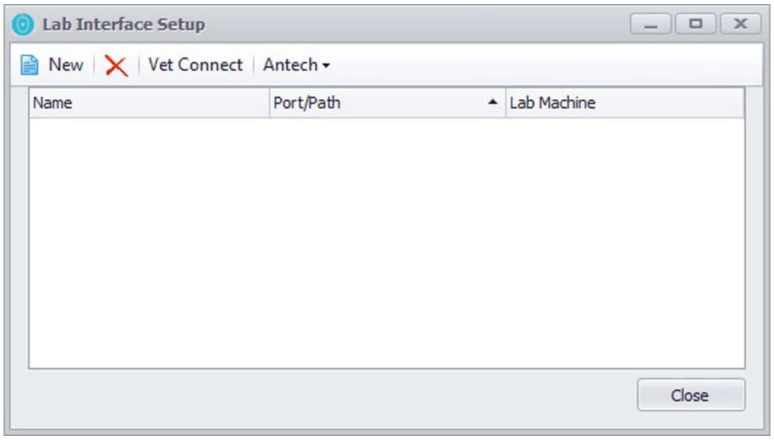


If you create a code, it must be validated by Antech before it will be accepted. Contact Antech at one of the following telephone numbers:

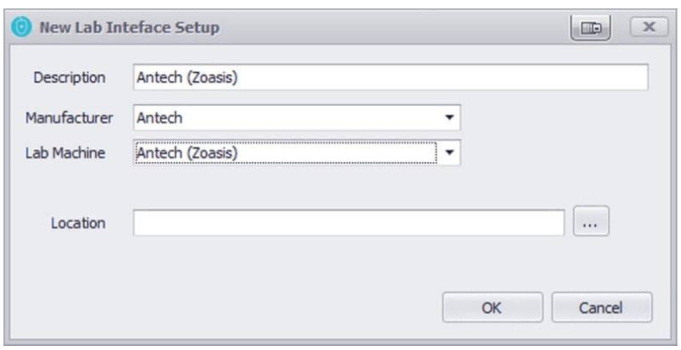
✓ **West**	**800.745.4725**
✓ **East**	**800.872.1001**
✓ **Canada**	**800.341.3440**
✓ **Test Express**	**888.397.8378**

Antech New Lab Machine Setup

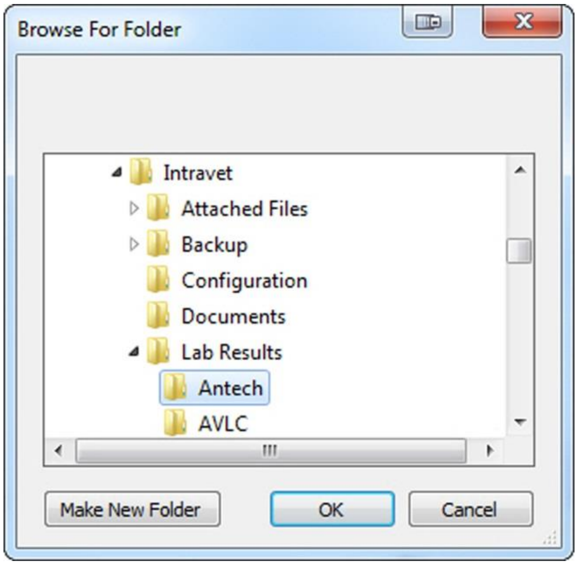
- Click **New**.



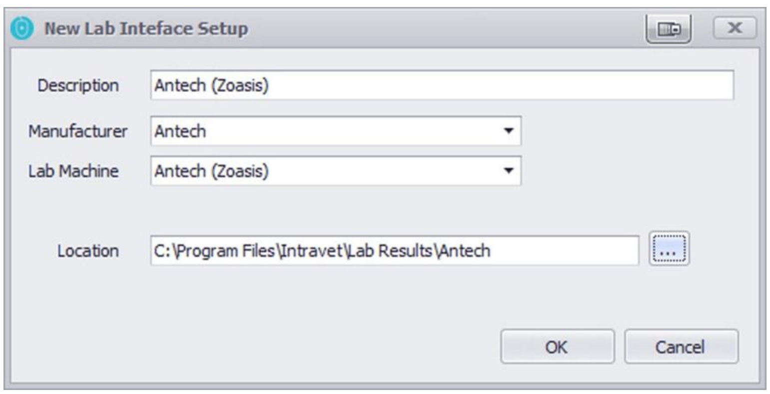
- Select **Antech** in the **Manufacturer** drop-down list.
- Select Antech (Zoasis) in the Lab Machine drop-down list.
- Use the  ellipsis button under Location to navigate to the folder where the files are stored.
- Click OK.



- Click **OK**.



- Click **OK**.

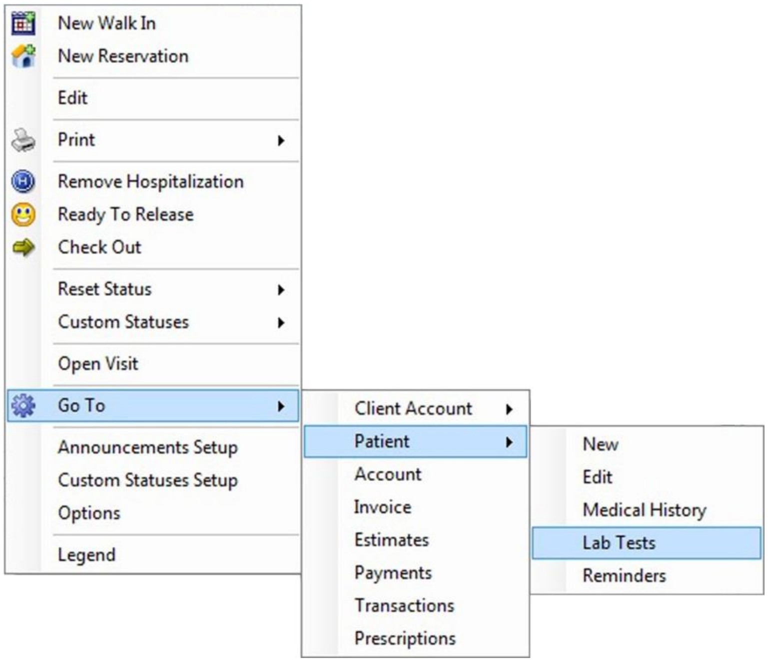


To Receive Results from Antech

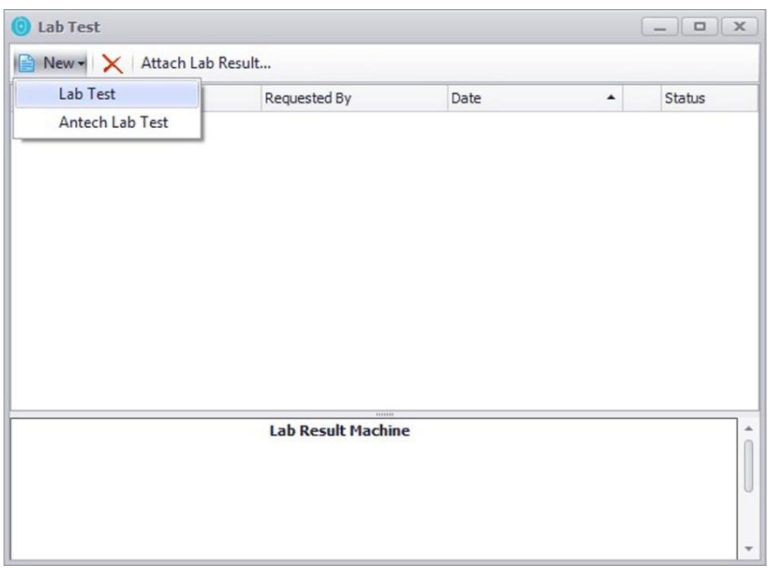
After you have downloaded the results from the website, store in the Antech folder.

Antech / Zoasis Lab Acquisition

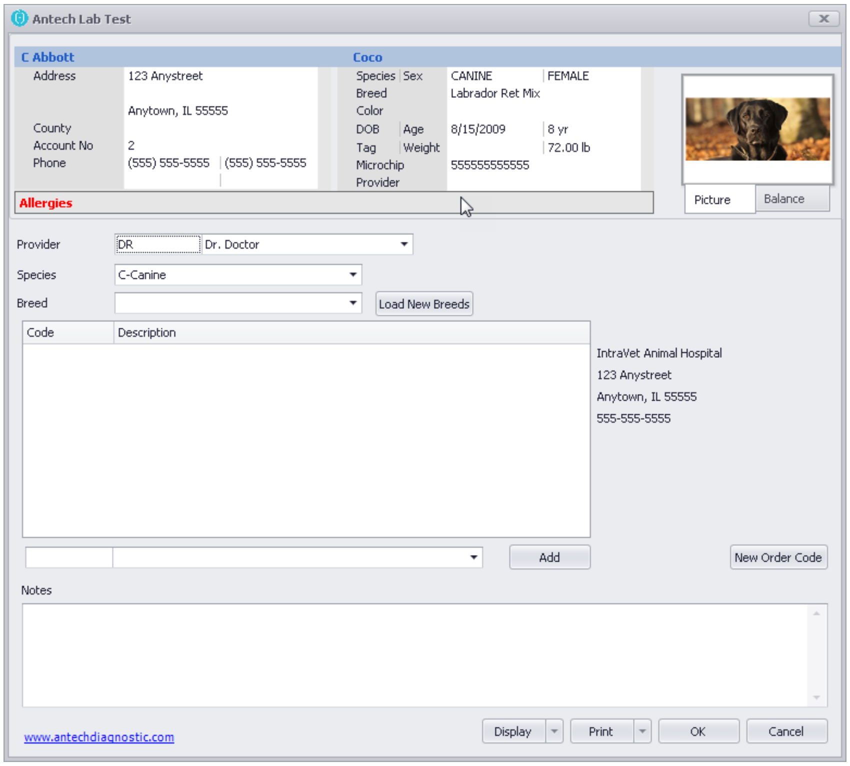
- From the IntraVet Control Center, right-click on the patient and select **Go To | Patient | Lab Tests**.



- Click New | Antech Lab Test.



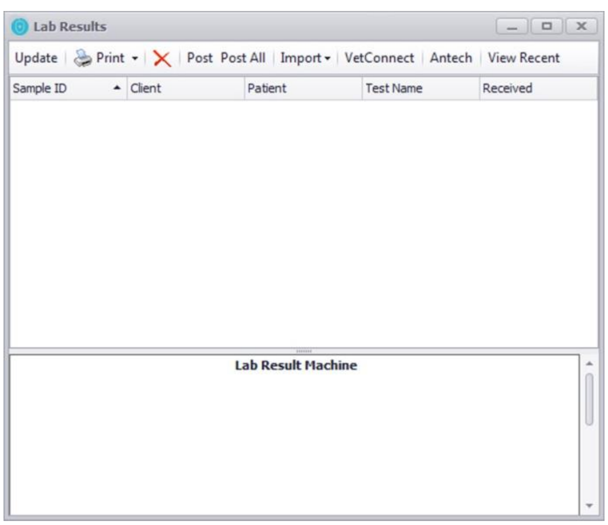
- Use down-arrow to select **Provider**.
- Select **Species** and **Breed** (these lists come from Antech).
- Enter **Notes** (if desired).



- Send the printed form with the blood samples in the package.

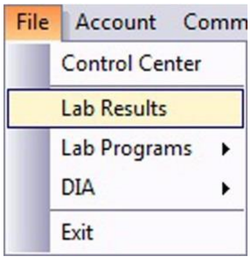
To Download Results from Antech

- Click **Antech**. This will import into the new results window.

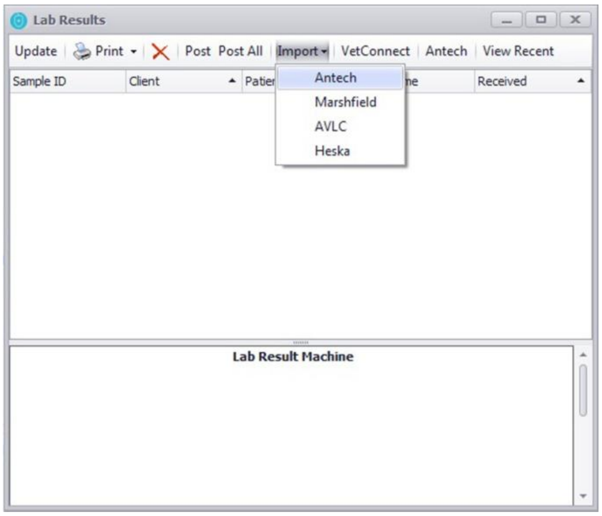


To view Lab Results for Antech

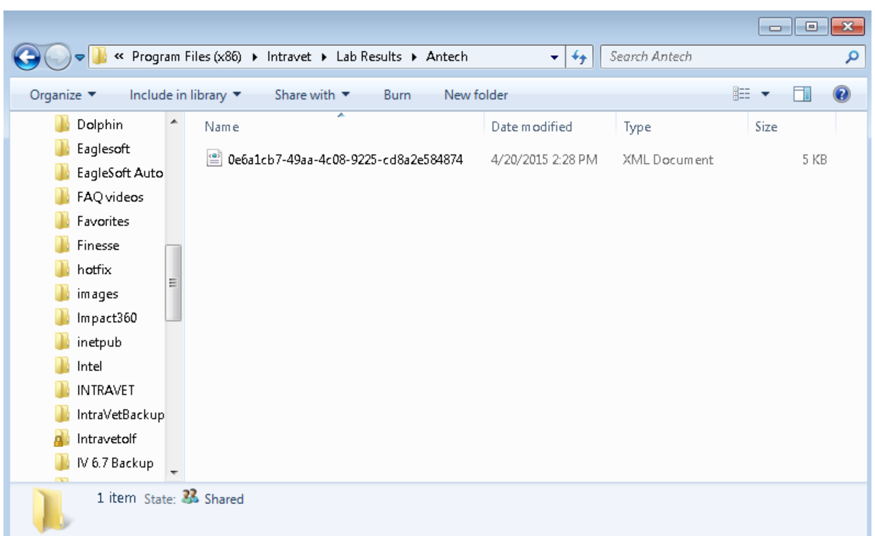
- From the IntraVet Menu Bar, select **File | Lab Results**.



- Click Import | Antech.

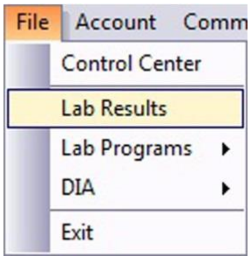


- Select the location you stored the results. Select the results file.
- Click **Open**.



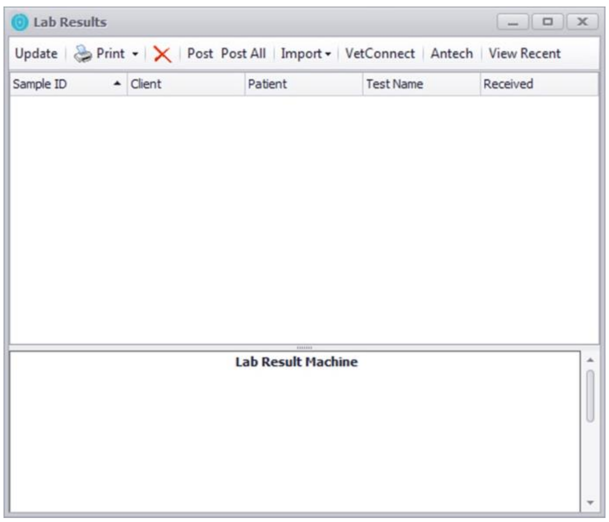
To view Recent Lab Results

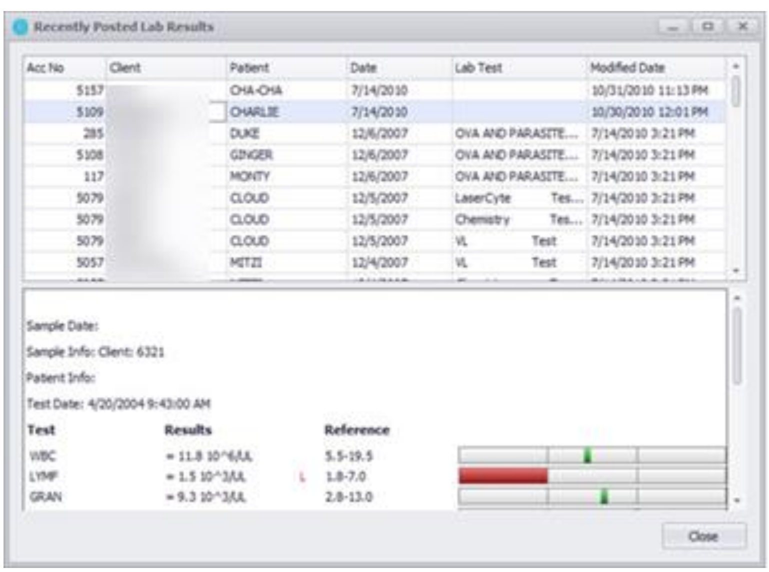
- From the IntraVet Menu Bar, select **File | Lab Results**.



Or,

- From the Control Panel, highlight the patient and select the Lab Results icon.
- Click View Recent.





Lab Tests/Order Codes

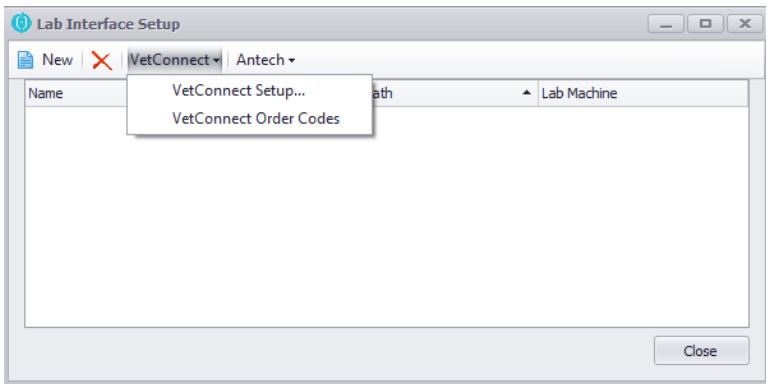
IDEXX VetConnect and Antech practices now have the ability to send requests from IntraVet as well as receiving lab results. Submit lab requests from within the IntraVet software and

VetConnect/Antech sends results and results status to IntraVet for easy updating of the patient history.
To update your IDEXX VetConnect/Antech, you will need to make some changes to your Lab Interface Setup.
To make the changes, go to Setup | Lab Interface Setup| VetConnect Order Codes or Setup | Lab Interface Setup | Antech Order Codes. You have the option to create New, Edit or Inactivate Codes.

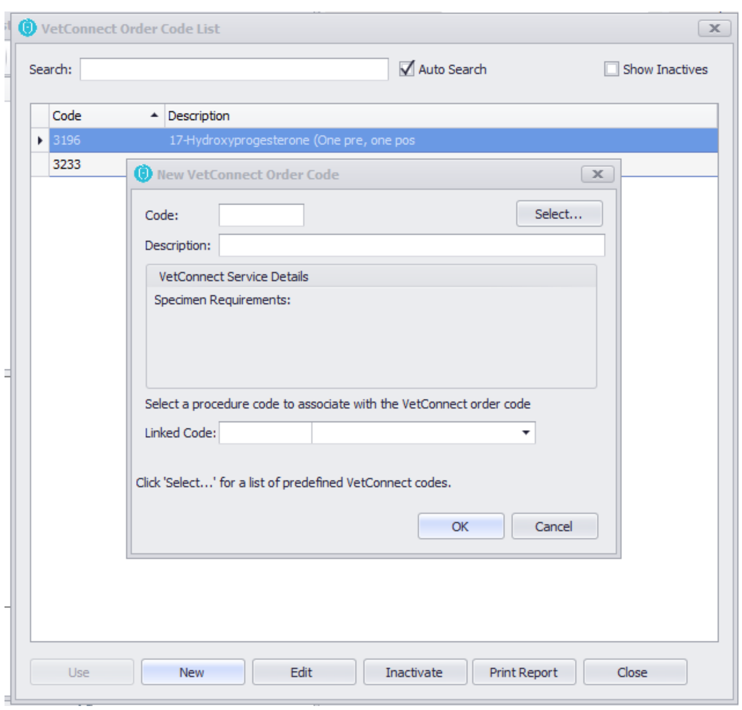
Create and Link to VetConnect/Antech

Create and link VetConnect/Antech order codes within IntraVet. To begin, select Setup | Lab Interface| VetConnect| VetConnect Order Codes or Setup | Lab Interface| Antech | Antech Order Codes.

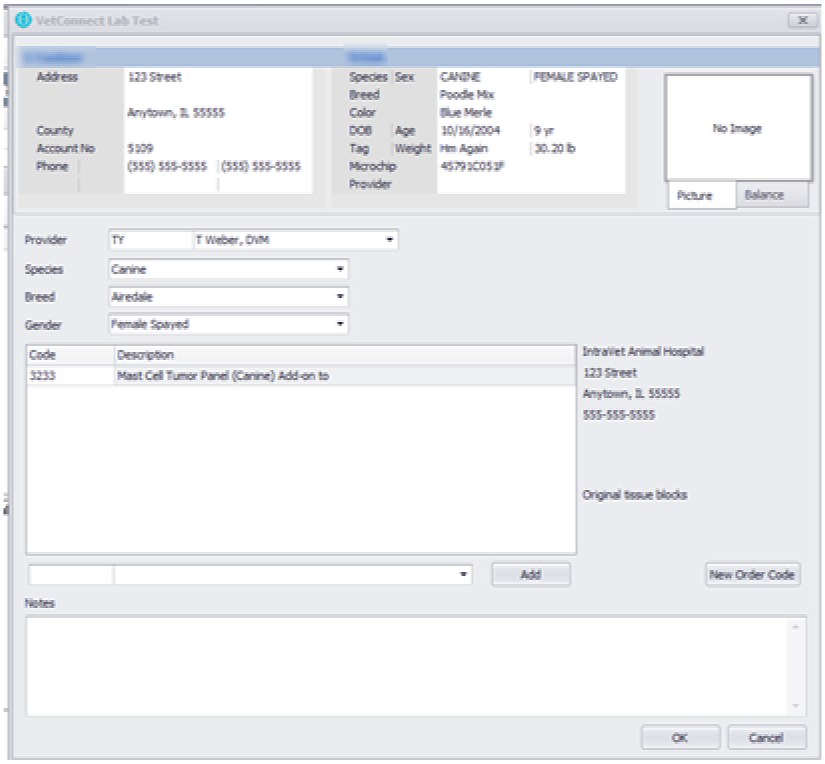
This is also available from the lab tests screen.



The Code List Window appears. Select New or Edit to open the code window.



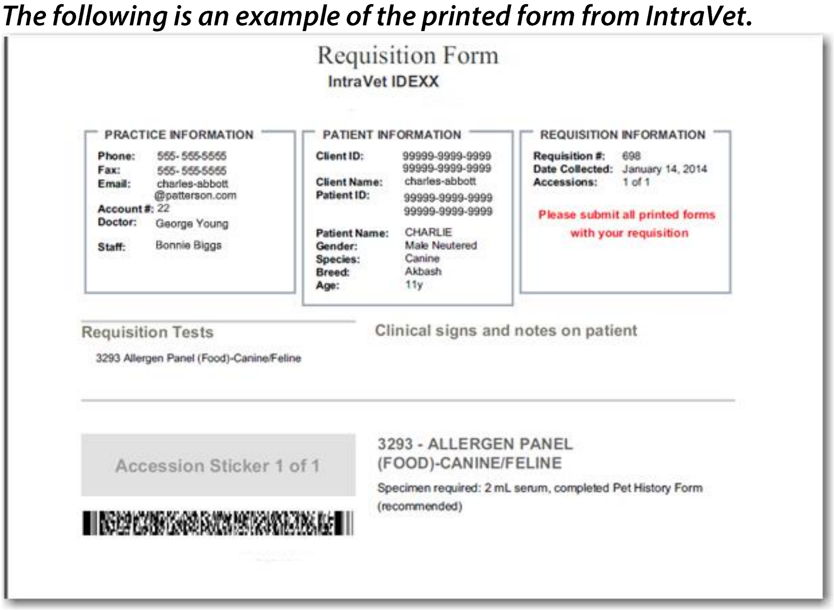
Select a code from the VetConnect/Antech code list. The Specimen details will appear. Select an existing IntraVet Procedure Code to link the code to an VetConnect/Antech order code.



After creating a new VetConnect/Antech test:

- Complete the info needed on the form and add an order code(s). Order codes can be created from this screen as well.
- Click **OK**. A request to VetConnect/Antech will be sent.
- The order form will print automatically and the procedure code will be automatically added to the Patient Visit plan.

The following is an example of the printed form from IntraVet.



Requisition Form

IntraVet IDEXX

PRACTICE INFORMATION

Phone: 555-555-5555
Fax: 555-555-5555
Email: charles-abbott@patterson.com
Account #: 22
Doctor: George Young
Staff: Bonnie Biggs

PATIENT INFORMATION

Client ID: 99999-9999-9999 99999-9999-9999
Client Name: charles-abbott
Patient ID: 99999-9999-9999 99999-9999-9999
Patient Name: CHARLIE
Gender: Male Neutered
Species: Canine
Breed: Akbash
Age: 11y

REQUISITION INFORMATION

Requisition #: 698
Date Collected: January 14, 2014
Accessions: 1 of 1

Please submit all printed forms with your requisition

Requisition Tests

3293 Allergen Panel (Food)-Canine/Feline

Clinical signs and notes on patient

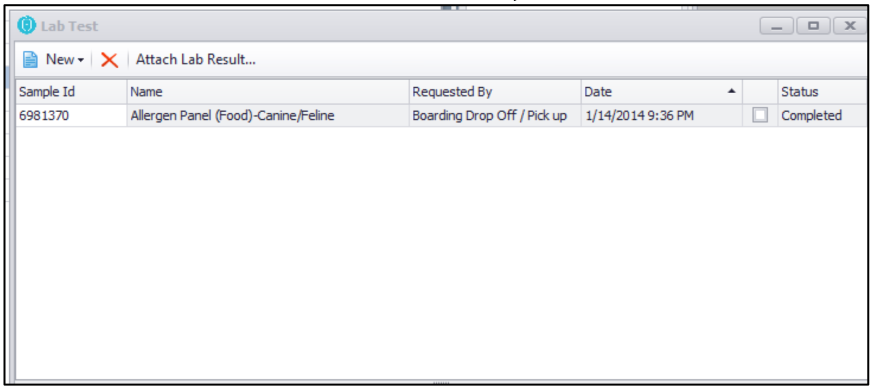
Accession Sticker 1 of 1

3293 - ALLERGEN PANEL (FOOD)-CANINE/FELINE

Specimen required: 2 mL serum, completed Pet History Form (recommended)

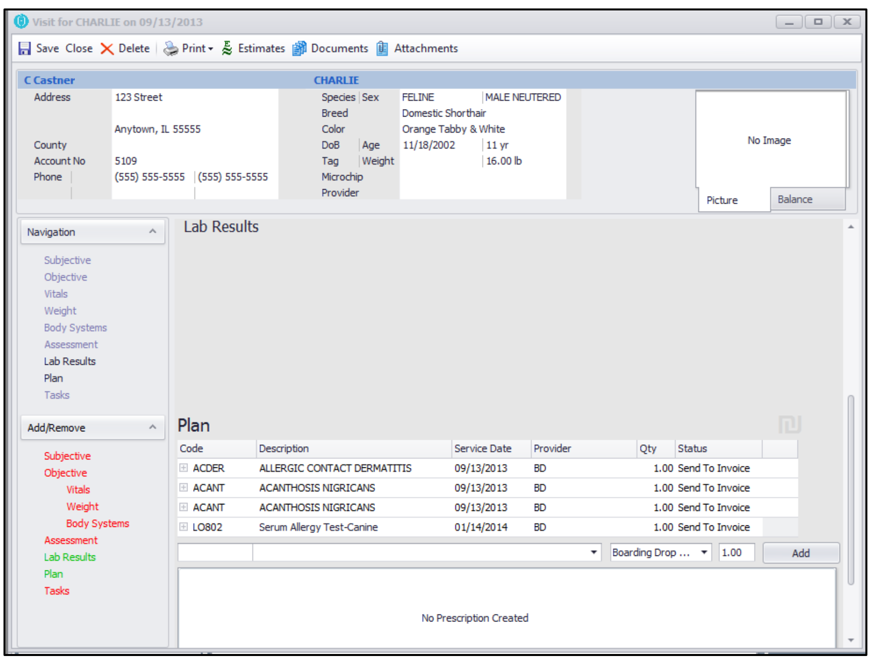
Requisition forms are only available with Antech and VetConnect.

The Lab Test window displays all the lab tests that have been created for the selected patient visit. Access this from the Visit, Medical History, Lab Results Screen and Control Center.

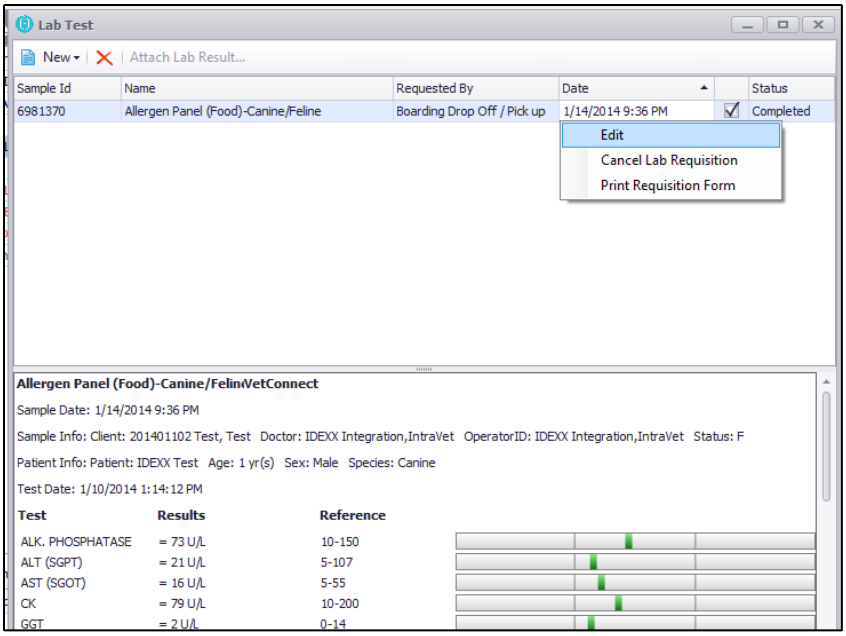


Now, you can add tests throughout these areas for any labs. Codes that are marked as Lab Test within code setup are added to the plan within a visit or invoice. You can also manually create a lab test for a procedure that is not marked as a Lab Test within IntraVet.

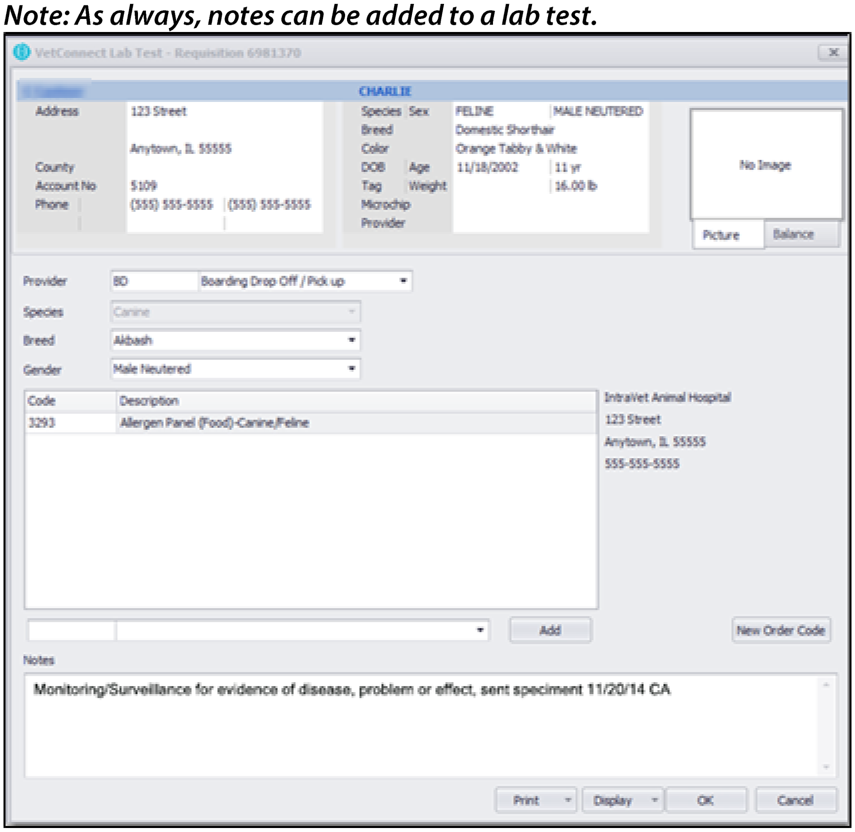
Note: Your practice must have the Lab Results section added within the visit to access the Lab Test screen with a right-click.



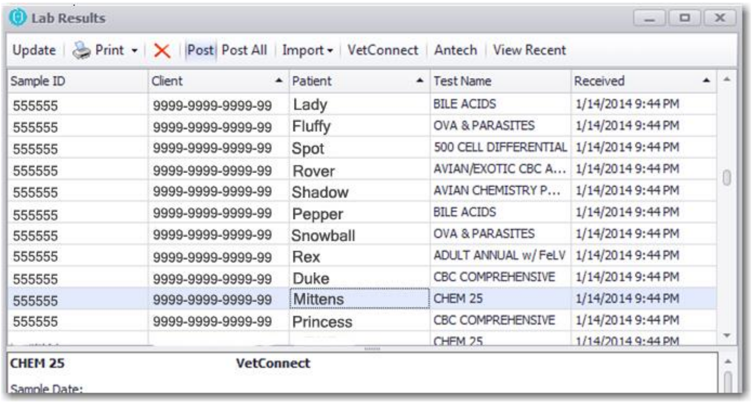
In the Lab Test, you can Edit, Cancel and Print the Lab Test by right-clicking on the selected Lab Test. Depending on the status displayed in IntraVet from VetConnect/Antech, the lab test can be edited or cancelled.



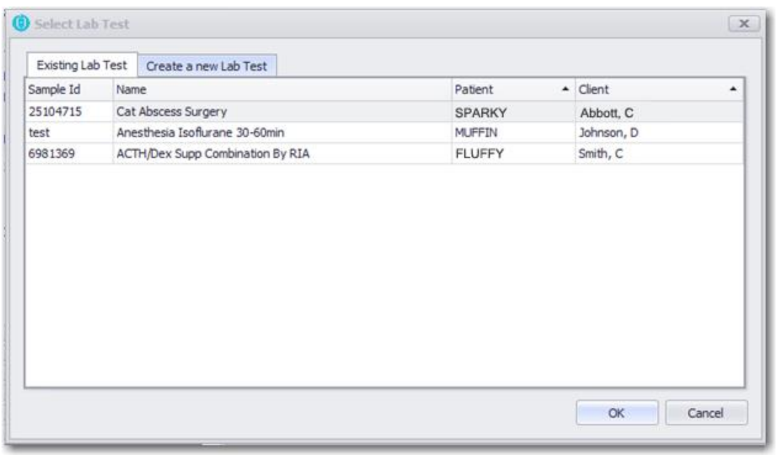
Note: As always, notes can be added to a lab test.



To post the Lab Results to the patient's visit, select the Lab Results option in IntraVet, located under File | Lab Results.



If a patient is attached to the lab result code, the lab result will be associated with the visit automatically, but if there is no patient listed, manually select from the list of active visits or create a new one.



Once posted, the Lab Results will show in the Medical History under the Visit and Lab Results tabs, as well as the Visit window and the Lab Tests window.

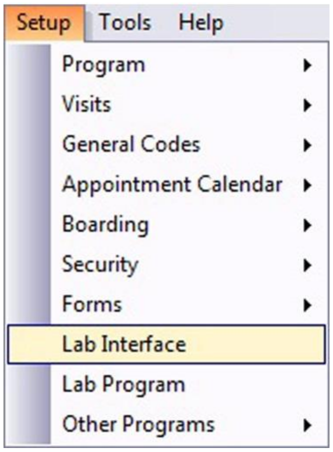
AVLC – American Veterinary Laboratory Corporation

Integration is similar to Antech (see above).

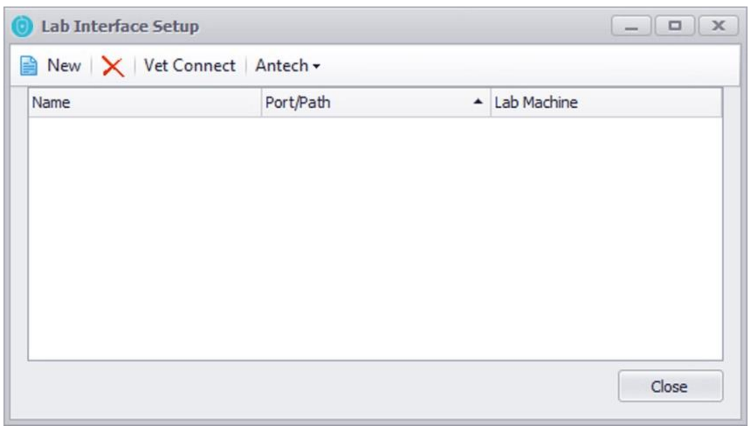
Download the file from the Lab website and then upload to IntraVet.

Set up AVLC Interface

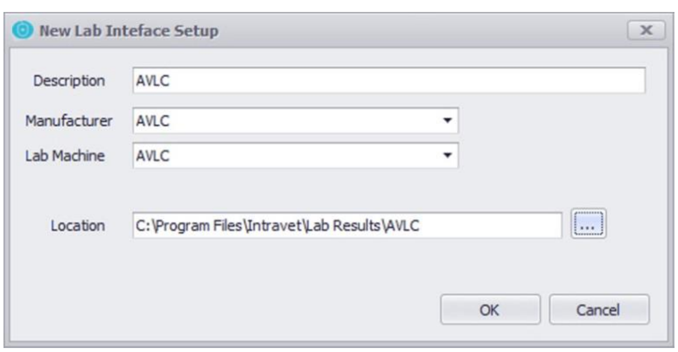
- From the IntraVet Menu Bar, select **Setup | Lab Interface**.



- Click **New**.



- Select the Manufacturer – AVLC.
- Select the **Lab Machine** – **AVLC**.
- Use the  ellipsis button under Location to navigate to the folder where the files are stored.



Heska Data Capture Utility (DCU)

IntraVet contains a lab interface for Heska's CBC. This utility allows integration with other Heska equipment. If you currently use the CBC and/or SpotChem lab integration you do not need to change the way your equipment is currently connected, unless you want to integrate all your Heska equipment into one interface.

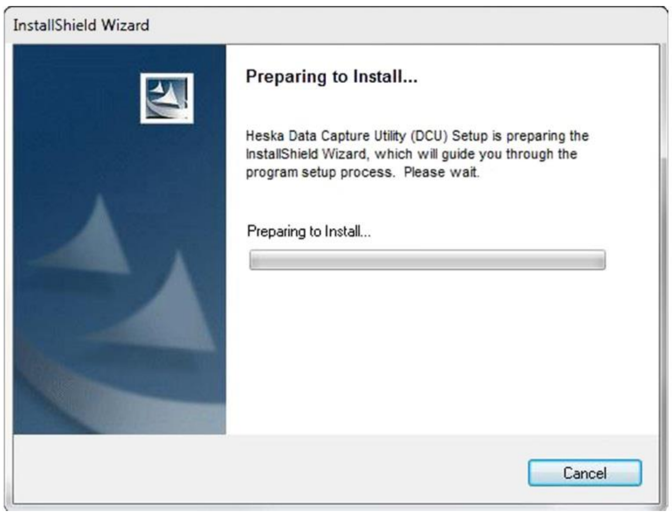
The Heska DCU allows the following transfers:

- **HemaTrue Veterinary Hematology**
- **DRI-CHEM Veterinary Chemistry Analyzer**
- **SpotChem EZ Chemistry**
- **CBC Diff**

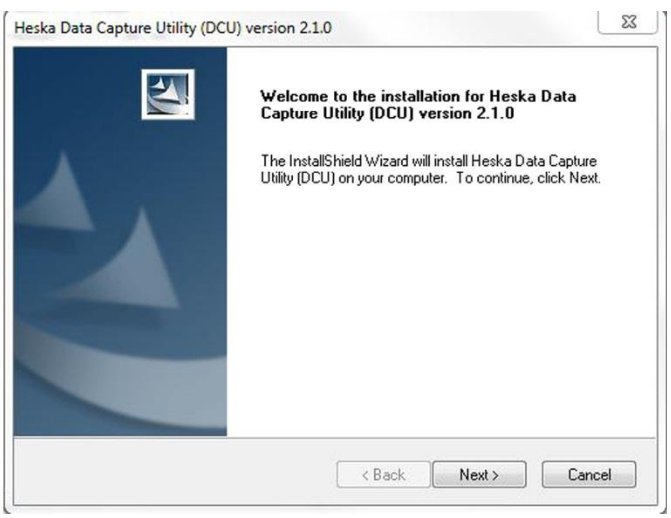
Heska DCU requires a special install with IntraVet.

Insert the Installation DVD into the disk tray and close the tray.

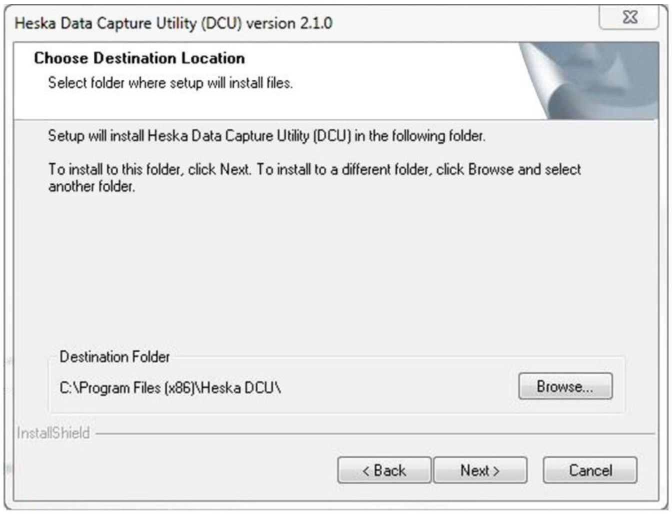
- Cancel out of the install.
- Double-click on **My Computer**. Right-click on the CD-ROM drive and select **Explore** or **Open**.
- Select **Heska DCU** Folder.
- Double-click on the Heska_Data_Capture_utility_2.1.0_installer.exe



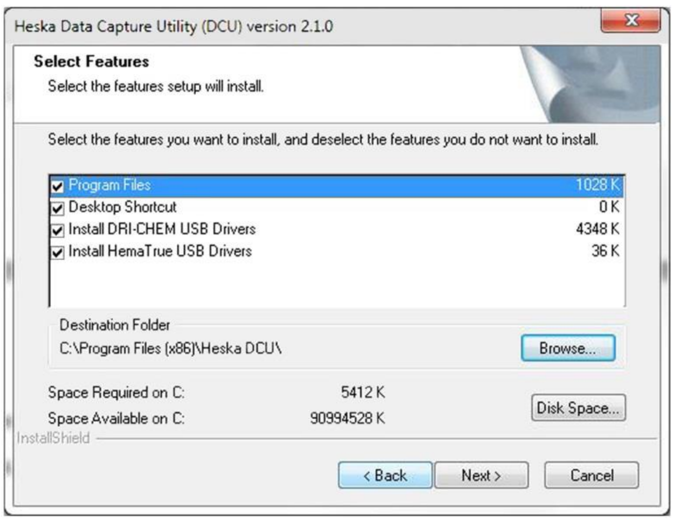
- Click **Next**.



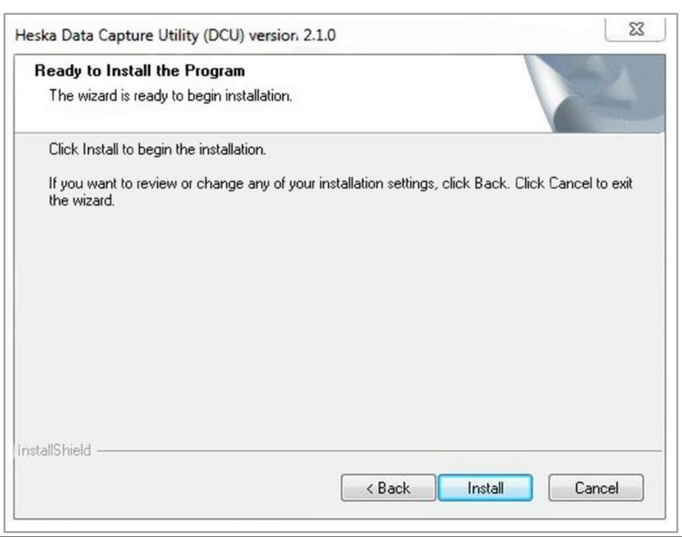
- Check the destination folder. It defaults to the C drive. Edit as needed.
- Click **Next**.



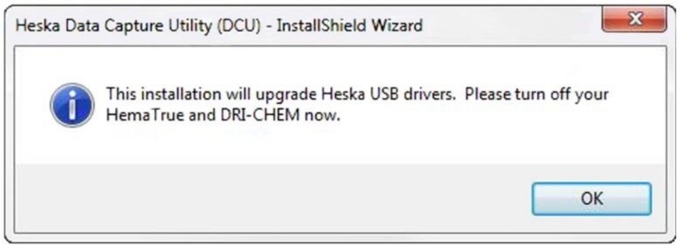
- Leave all checkboxes checked and review the disk space.
- Click **Next**.



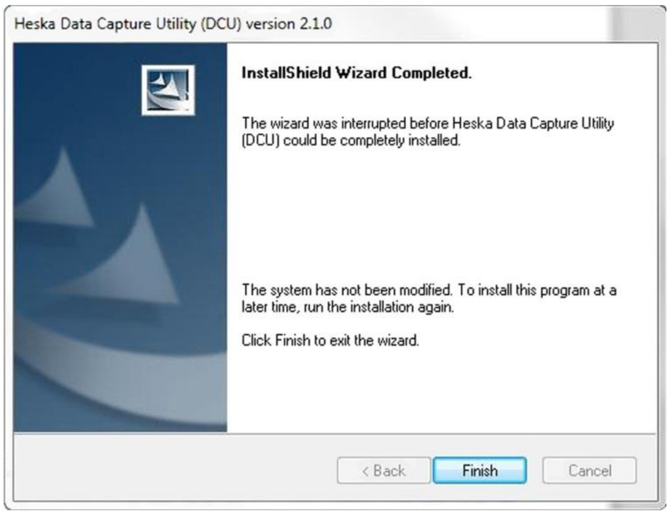
- Click **Install**.



- Click **OK**.



- Click **Finish**.



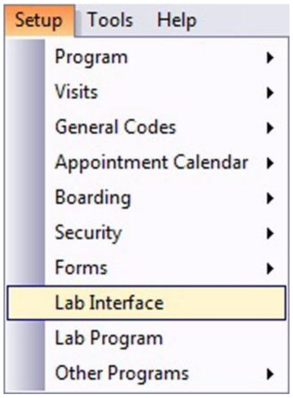
Configuring Equipment for DCU

After the utility has been installed, a Heska icon will appear in the system tray (bottom right of the screen).

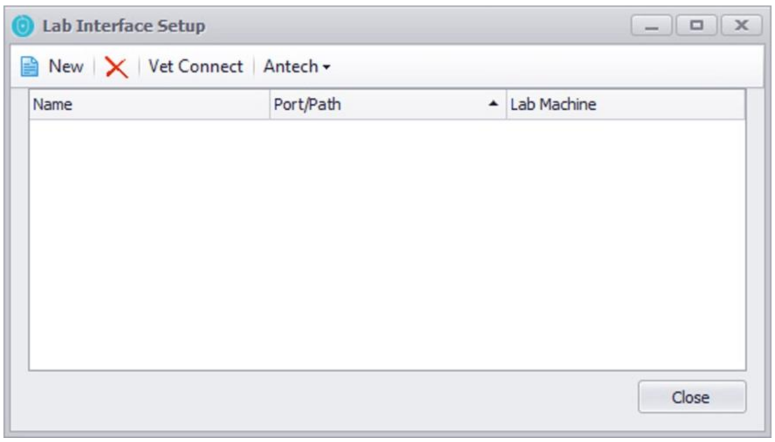
- Double-click on the Heska tray icon to open the DCU. You can also open DCU through **Start | All Programs**. Select Configure Analyzers.
- Select **Add** to enter the desired equipment.
- Select the **Port** and the units the device is set to. Once equipment is added, it should be ready to communicate with IntraVet.
- Double-click on **Preferences** to specify results destination. Results should be directed to the C:\Program Files\Intravet\Lab Results\Heska (if there is no Heska folder set up, add a new folder called Heska) and place a checkmark in the **Copy Reference Range** checkbox.
- Click **OK** and close any remaining windows.

Set up Heska Interface in IntraVet

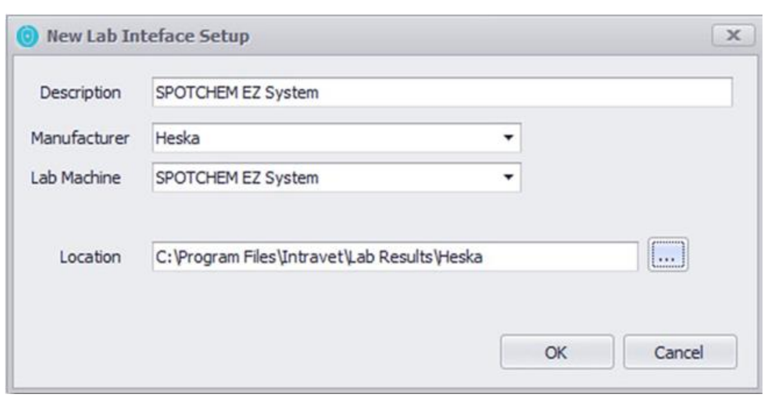
- From the IntraVet Menu Bar, select **Setup | Lab Interface**.



- Click **New**.

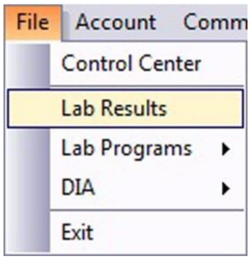


- Select the Manufacturer – Heska.
- Select a **Lab Machine**. This will fill in the **Description**.
- All the machines set up within IntraVet will be listed. You can have more than one of the same type of lab machine. Change the description to reflect the name of the room in which the machine is located to distinguish between them.
- Use the ... ellipsis button under **Location** to navigate to the folder where the files are stored.
- Click **OK**.

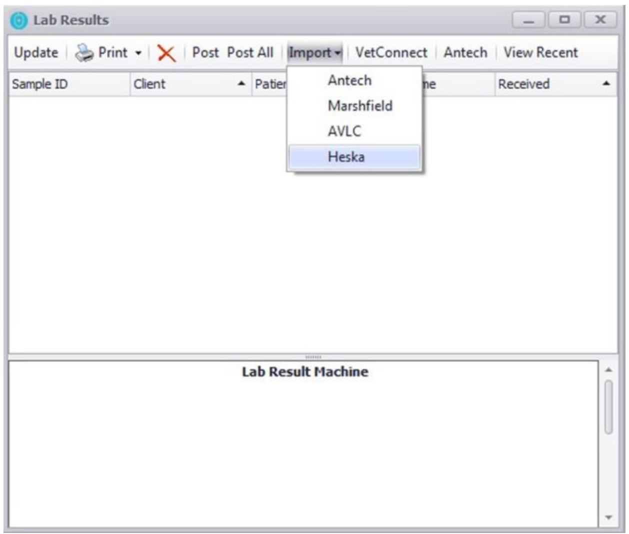


To view Lab Results for Heska

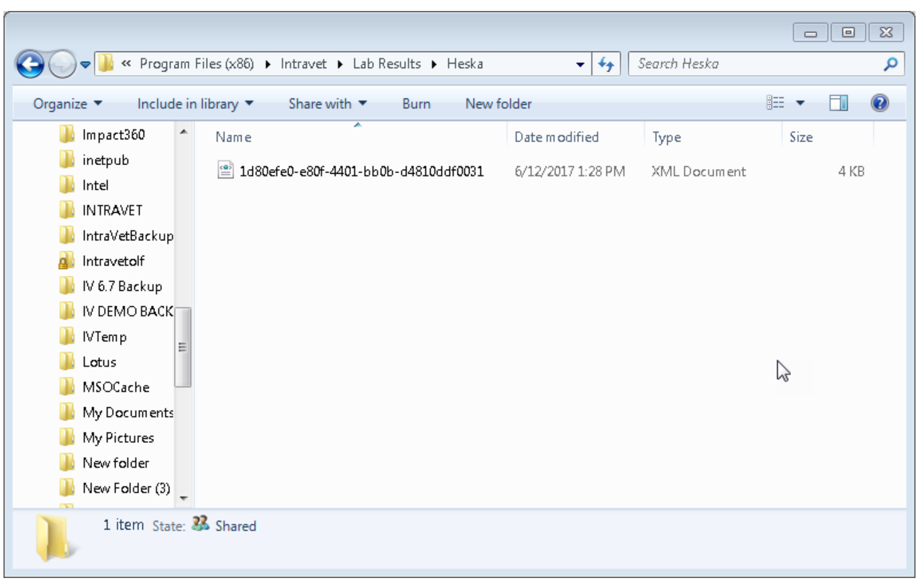
- From the IntraVet Menu Bar, select **File | Lab Results**.



- Click Import | Heska.



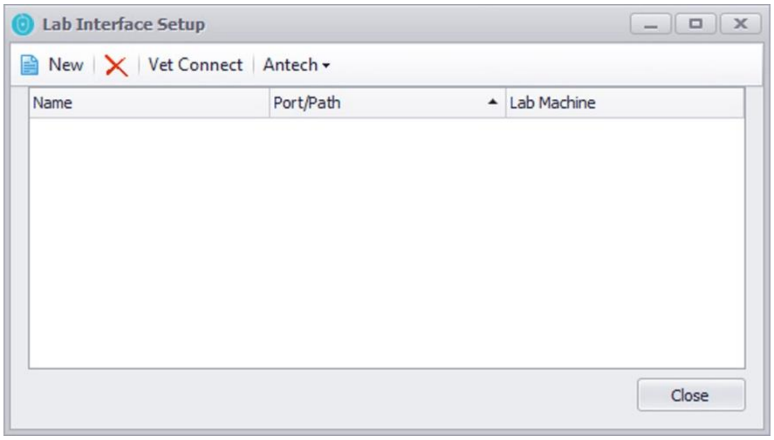
- Select the location you stored the results. Select the results file.
- Click **Open**.



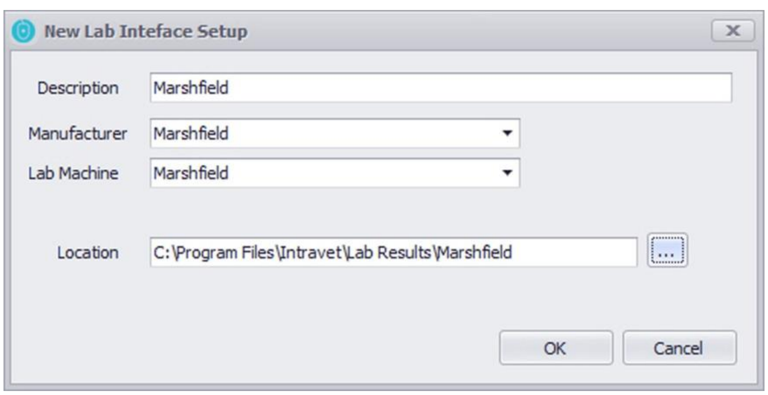
Marshfield Lab Interface Setup

IntraVet allows you to set up a procedure code as a lab test. Check this box if the code is a lab test. This generates a lab request when added to the plan or invoiced (depending on your workflow) to track lab requests and attach imported lab results.

- Click **New**.

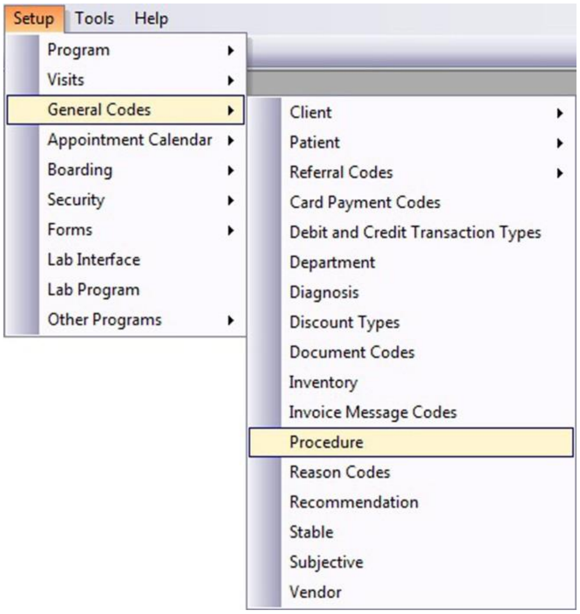


- Select **Marshfield** in the **Manufacturer** drop-down list.
- Select **Marshfield** in the **Lab Machine** drop-down list. This will fill in the **Description**.
- Use the  ellipsis button under Location to navigate to the folder where the files are stored.
- Click **OK**.

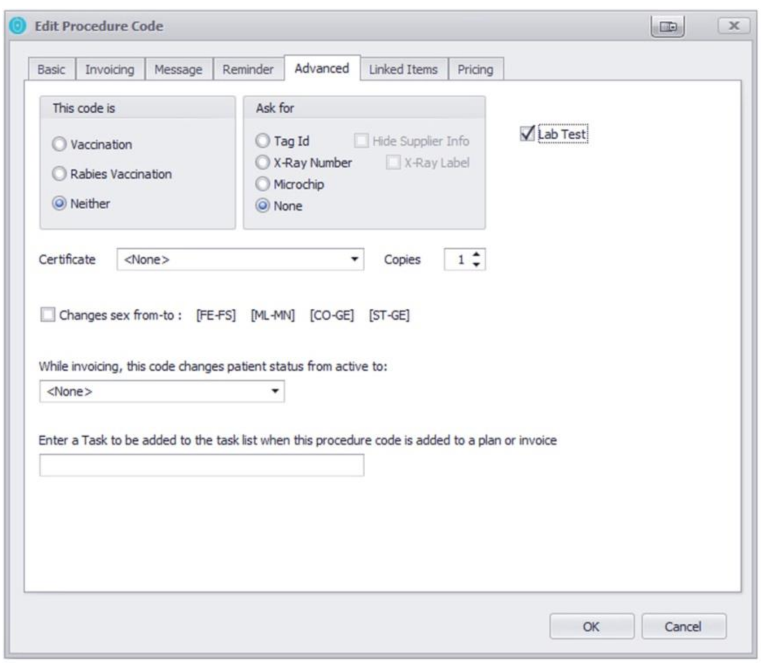


Edit Procedure Code to mark as a Lab Test

- From the IntraVet Menu Bar, select **Setup | General Codes | Procedure**.



- Select (highlight) the code to be edited.
- Click **Edit**.
- Select the **Advanced** tab.
- Check **Lab Test** checkbox.
- Click **OK**.

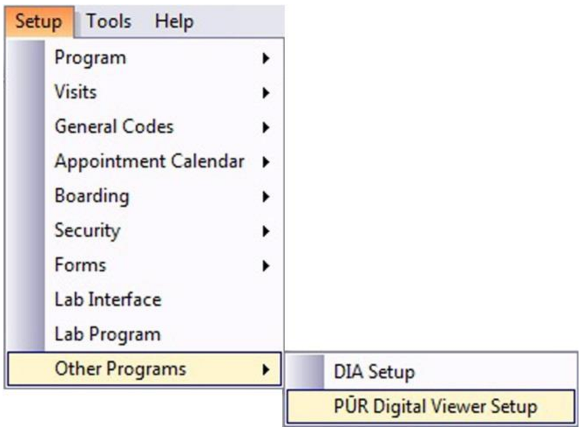


When Procedure Codes are marked as a Lab Test they are added to the plan and a lab request will be generated. The lab Results will automatically become green within the visit.

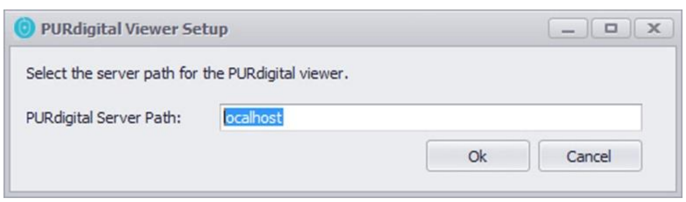
RADInfo Integration

RADInfo Integration Setup

- From the IntraVet Menu Bar, select Setup | Other Programs | PUR Digital Viewer Setup.



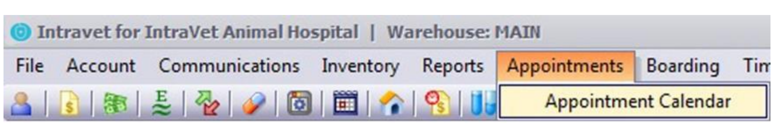
- Enter the Server Path for the PURdigital software.
- Click **OK**.



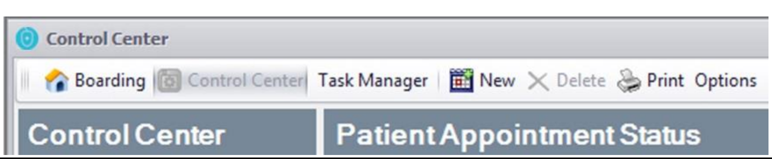
RADInfo File Acquisition

- From the IntraVet Toolbar, select the  **Control Center** icon, or

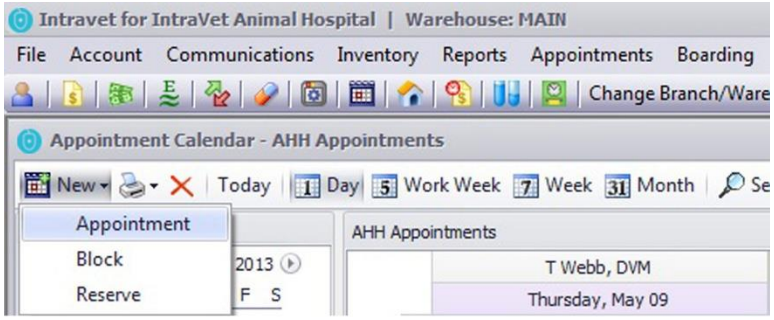
- Open the Appointment Calendar. Select **Appointment | Appointment Calendar** in the IntraVet Menu Bar.



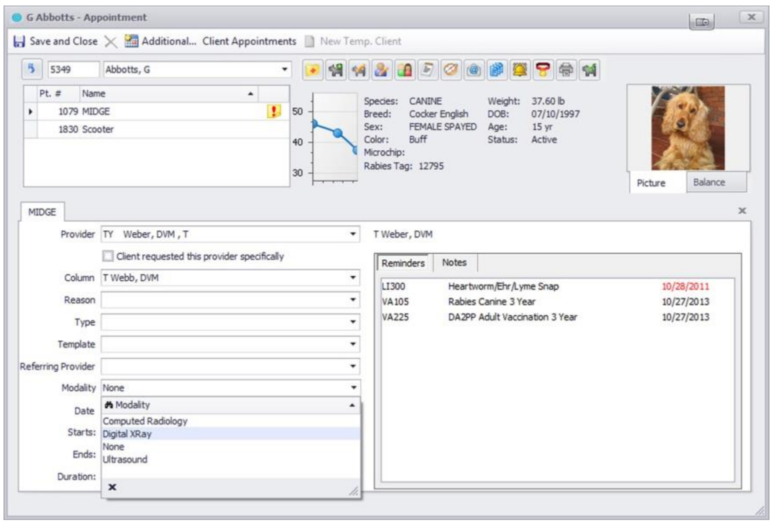
- Select the **New** hot link in the Control Center Menu Bar, or



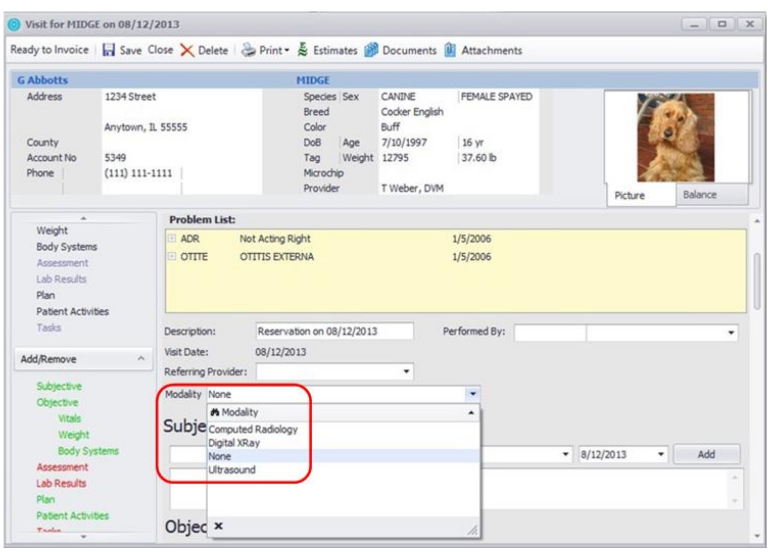
- From the Appointment Calendar, select New | Appointment.



- Choose a Client. Then select a **Modality**. To do this, double-click in the blank line or use the down-arrow to select.



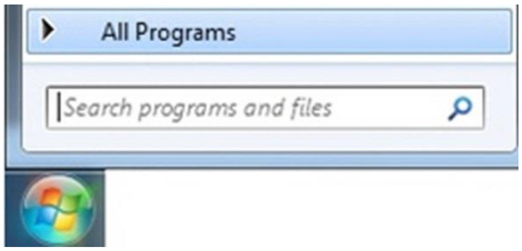
Modality is also part of the Visit and can be selected or updated at any time.



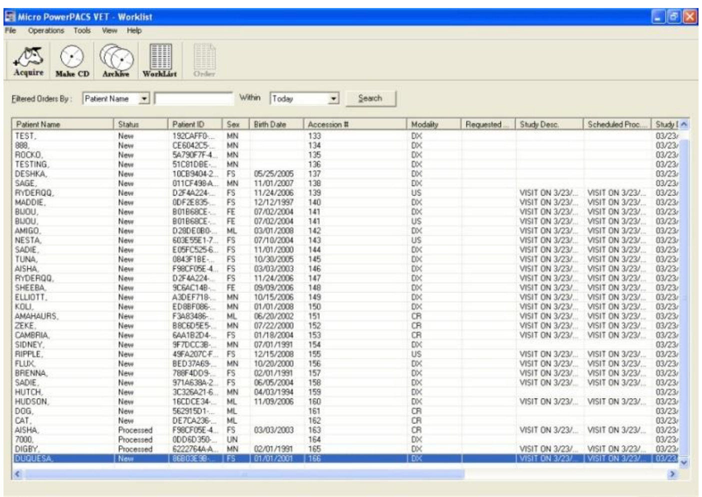
- Open the Micro PowerPACS software by clicking on the **Start** button on your desktop.

 or 

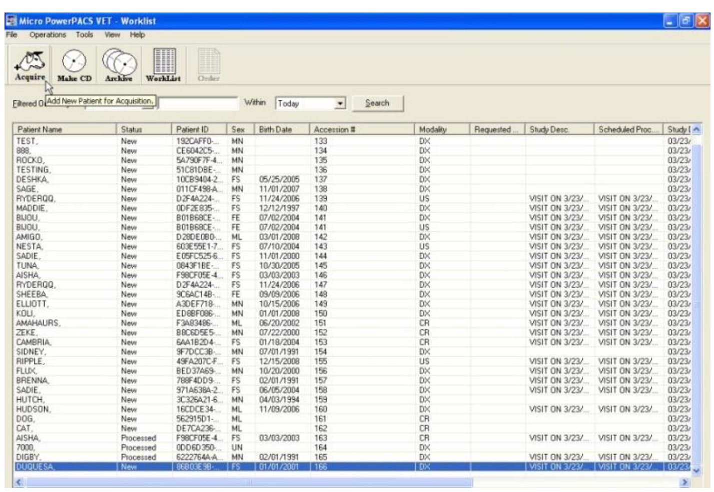
- Select **All Programs** and choose **Micropower PACS**. Then select **Micropower PACS**, again.



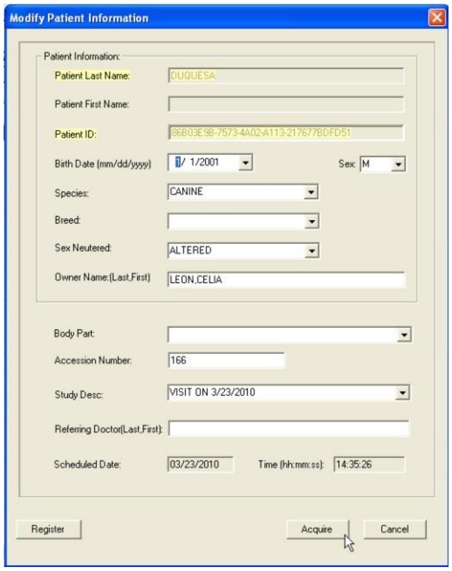
- In the Micro PowerPACS window, click **Search**, and the patient will appear in the list.



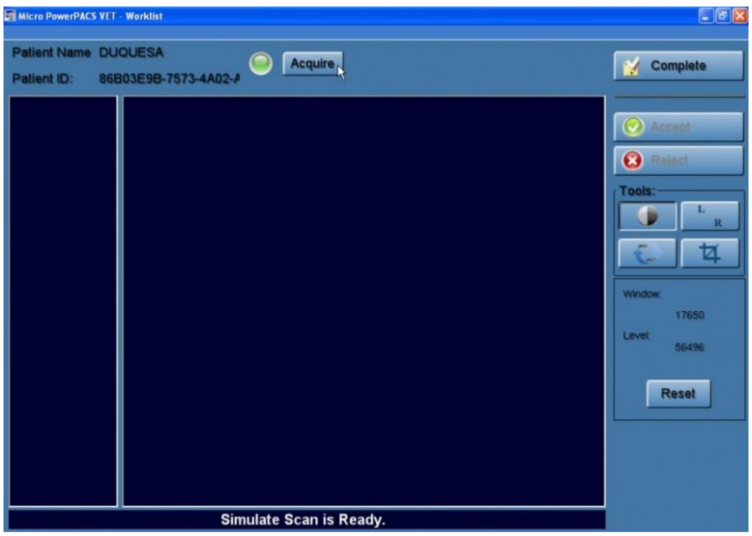
- Highlight the line. Click **Acquire**.



- The **Modify Patient Information** window opens. Verify, enter, and/or correct the appropriate information, and click **Acquire**.

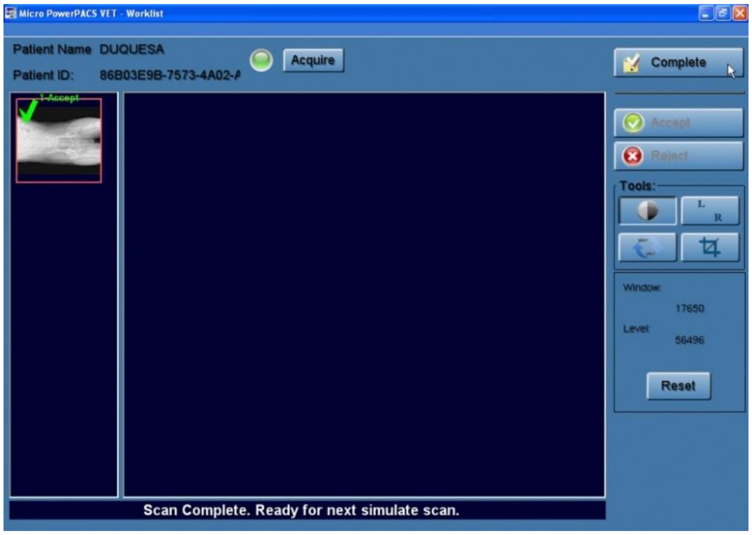


- When the scan screen opens, click **Acquire.**



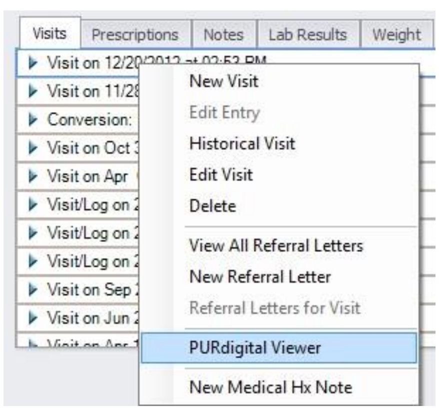
- Verify the image is correct, and click **Accept**.

- Click **Complete**.

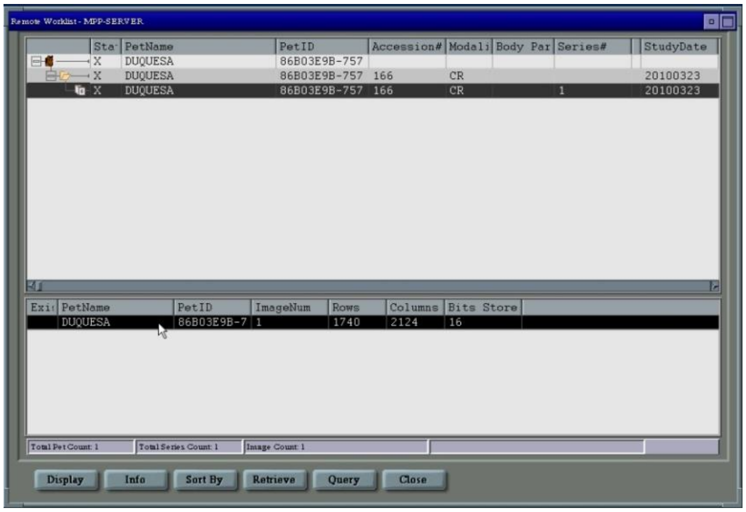


- In the IntraVet Control Center window, a custom column displays a checkmark on the patient's entry, indicating the image was received. This checkmark may take up to a minute to populate.

- You can view the image by opening the patient's Medical History; then, right-click on any visit, and click **PURdigital Viewer**.



- The **Remote Worklist Server** opens and displays all the acquisitions for the patient, sorted by date.



Lab Requests

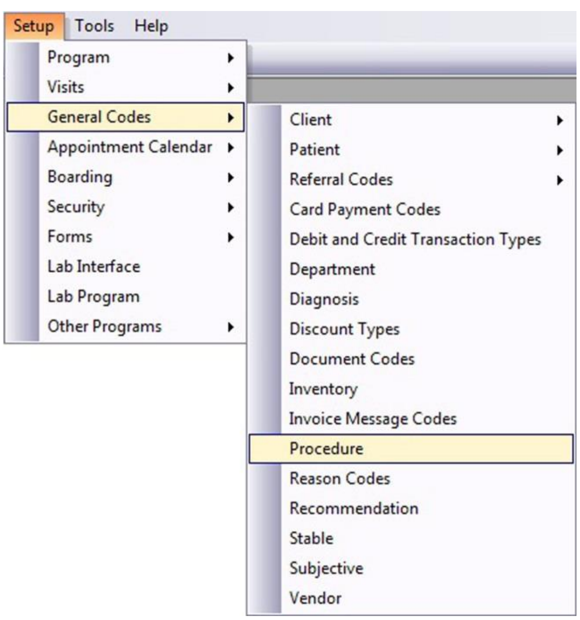
Requesting a Lab Test

There is more than one way to request a Lab Test for a patient. You can set up a procedure code so that it automatically requests a lab test each time the code is used. There are also two ways to request a lab test through the Control Center.

Request a Lab Test within Setup

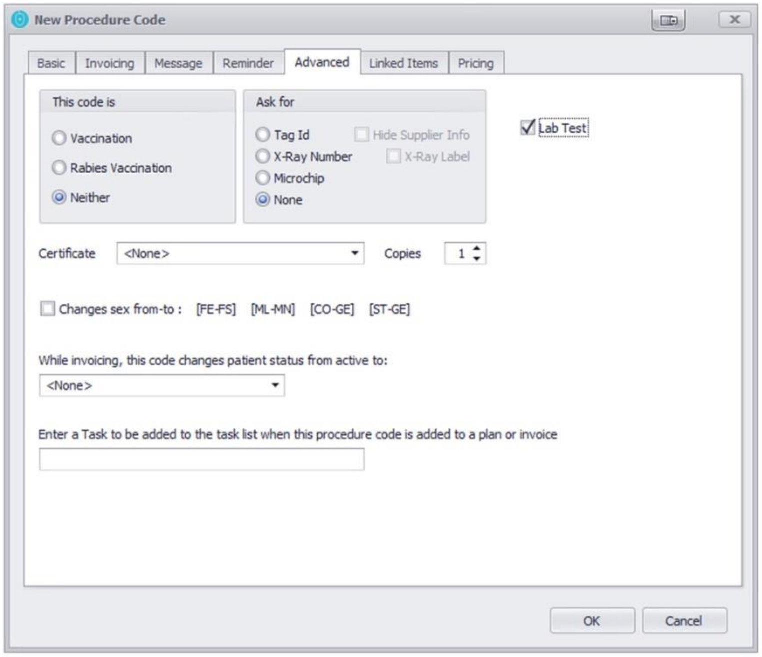
To automatically request a lab test, whenever chosen in a Visit or an Invoice:

- From the IntraVet Menu Bar, select Setup | General Codes | Procedure.



- Click New.
- Select the Advanced tab.
- Place a check mark in the Lab Test box.

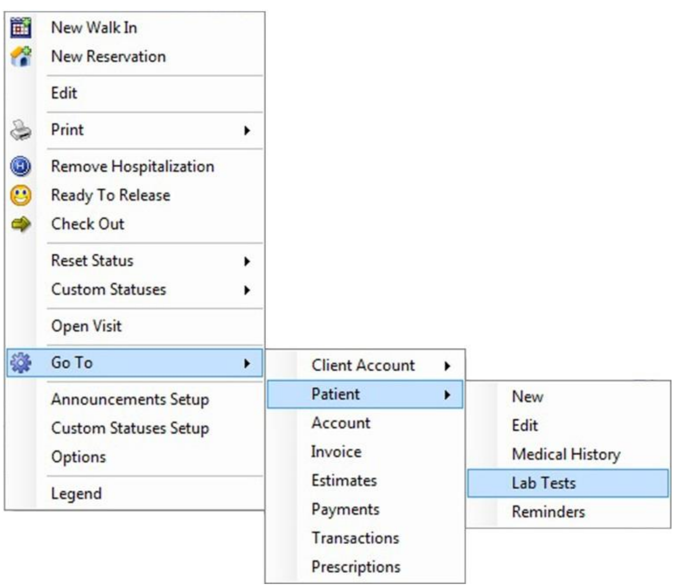
- Click OK.



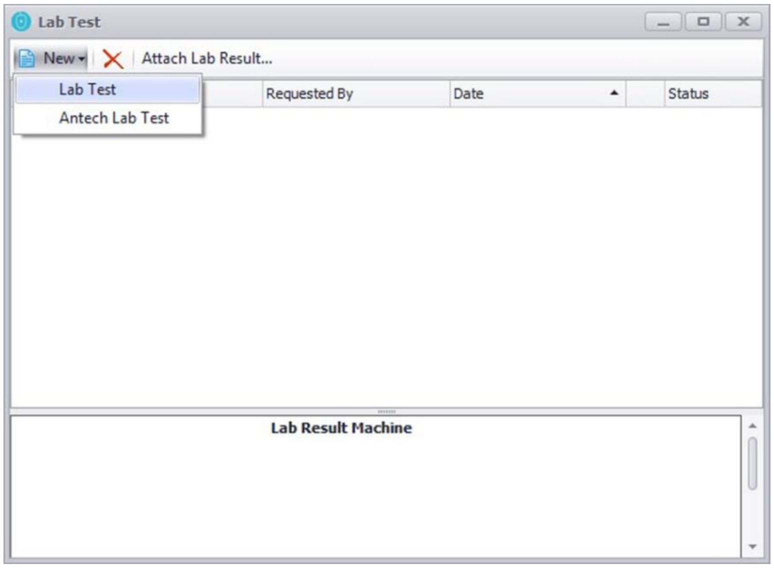
Request a Lab Test through Control Center

There is more than one way to request a lab test through the Control Center.

- Select the  Control Center icon in the upper left corner of the IntraVet window to open Control Center if it is not already open.
- Right-click on the Patient. Select Go To | Patient | Lab Tests.

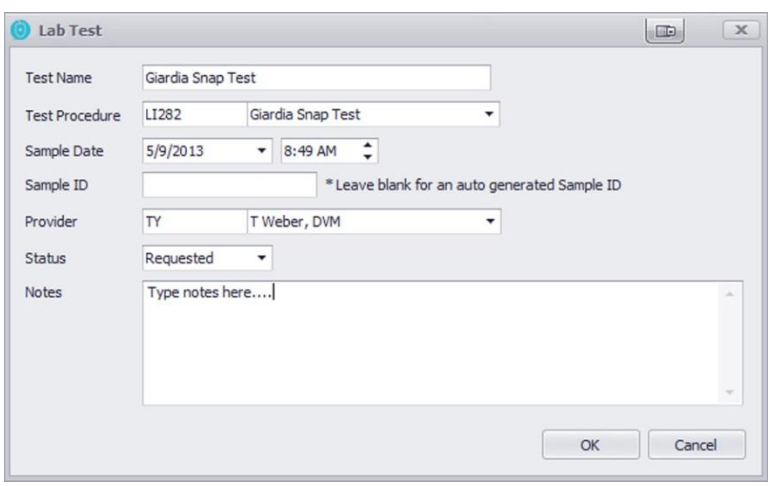


- Select New | Lab Test.



- Fill in the Test Name. This will pre-fill when the procedure is chosen. (It can be overwritten.)
- Choose a Test Procedure for the lab test.
- Sample Date and Time are pre-filled.
- Leave Sample ID blank for an auto-generated Sample ID.
- To select the Provider, click the down-arrow or Enter the blank field.
- Select a Status.
- Notes can be added.
- Click OK.

Status of the lab test can be changed at any time to Requested, Received, Reviewed or Completed.



Each test is given a status. The status is updated when a lab result is attached to a lab test. The Status can be changed from requested, received, reviewed or completed.

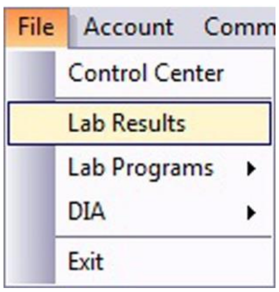
A new lab test can be created from the lab results screen by clicking Update and selecting Create a new lab test. Use this method if you have already imported a lab result that does not have a test created that is associated.

Attach Lab Results to Patient History

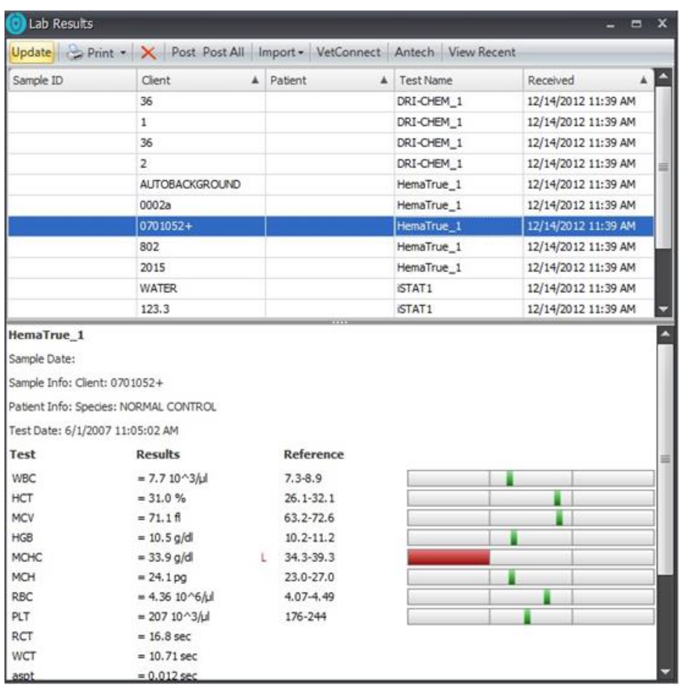
There are several ways to send your lab results to the patient history. They include:

Update – This allows you to assign the lab result to a specific client/patient file or an existing lab test. Choose this option if IntraVet was unable to read the client name and/or account number, and you need to find the correct client account.

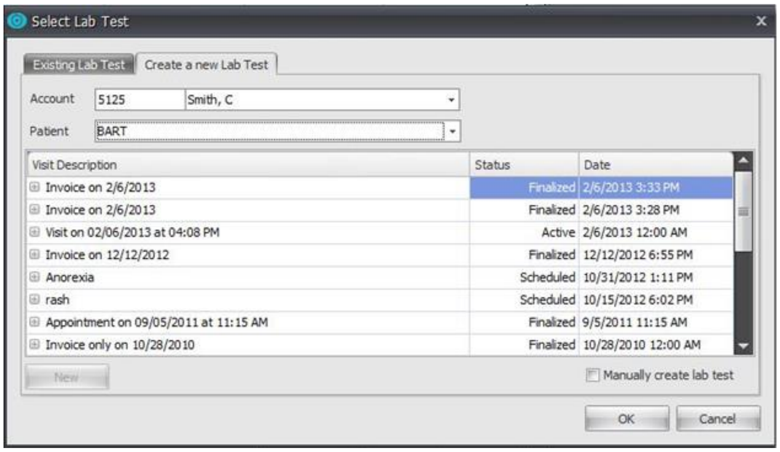
- From the IntraVet Menu Bar, select **File | Lab Results**.



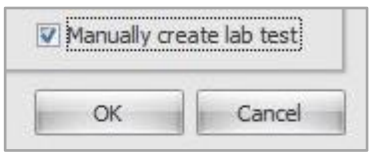
- Highlight the lab result.
- Click **Update**.



- Select the Create a new Lab Test tab.
- Enter the Client Name or **Account** number.
- Use the down-arrow to select the correct **Patient**.
- Highlight the Visit the Lab Result is associated with.



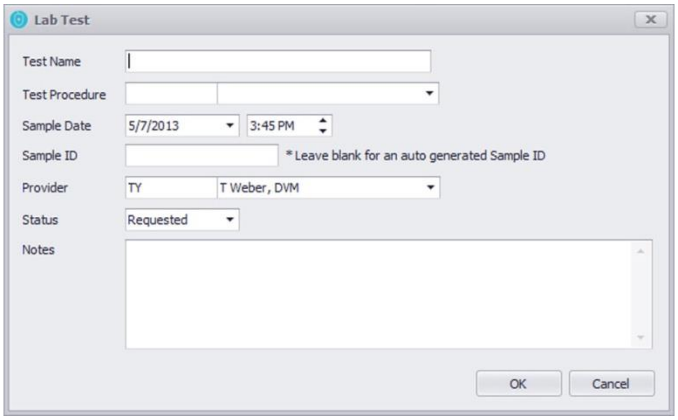
- If the Visit is not listed, click **New** or **Manually create lab test**.
- Click **OK**.



- Enter the **Test Name**.
- Select a **Test Procedure** for the lab test.
- Sample Date and Time are prefilled. Leave Sample ID blank for an auto generated **Sample ID**.
- Verify **Provider** (update if needed).
- Status choices include:
  a. **Requested**
  b. **Received**
  c. **Reviewed**
  d. **Completed**

Leave as Requested.

- Add **Notes** (if desired).
- Click **OK** to save.

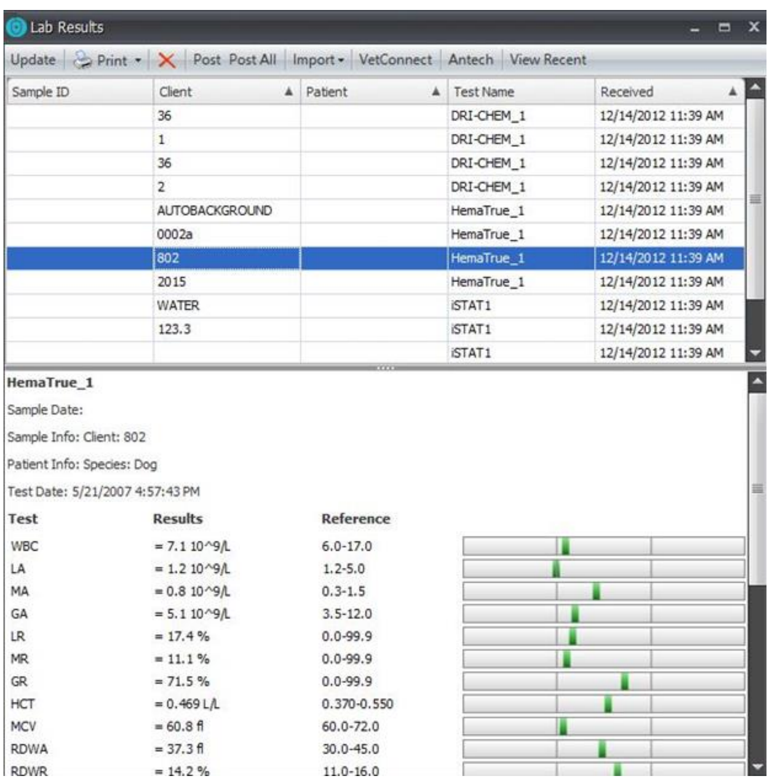


Lab results should now be in the correct client account/patient medical history.

Post and Post All

If the client name and/or account number can be read by IntraVet, the lab result will automatically post to the correct client/patient file.

- Highlight the lab result.
- Click Post. If the client and patient data is found then it will automatically post; if not the user will follow the same steps as discussed above.
- Or,
- Highlight all lab results.
- Click Post All. If IntraVet can read the client names and/or account numbers, the lab results will automatically post to the correct client/patient files.



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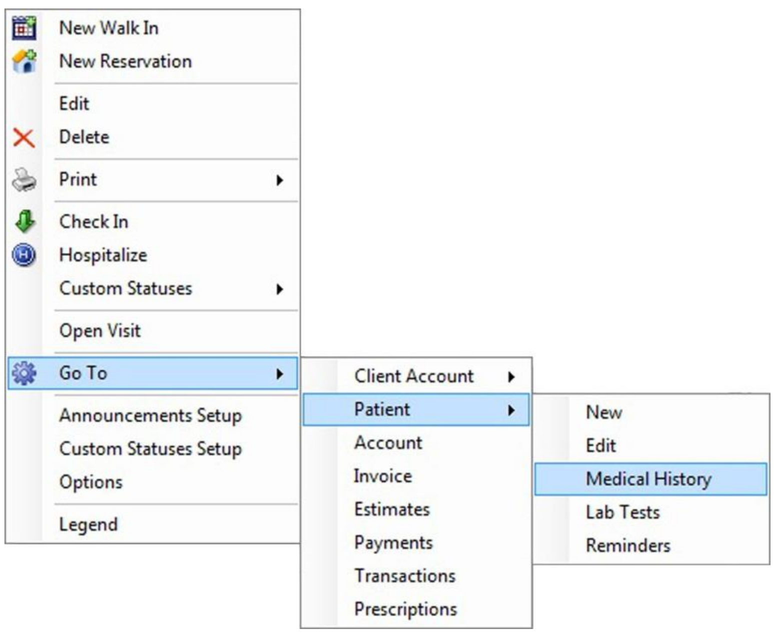
View Lab Results in the Patient's Medical History

Client Account:

- From the IntraVet Menu Bar, select Open Account. The Client List screen will appear. Scroll, if necessary, to locate the client's name.
- Double-click on the client's name to open that account.
- Click once to highlight the Patient. Click the Medical History icon.

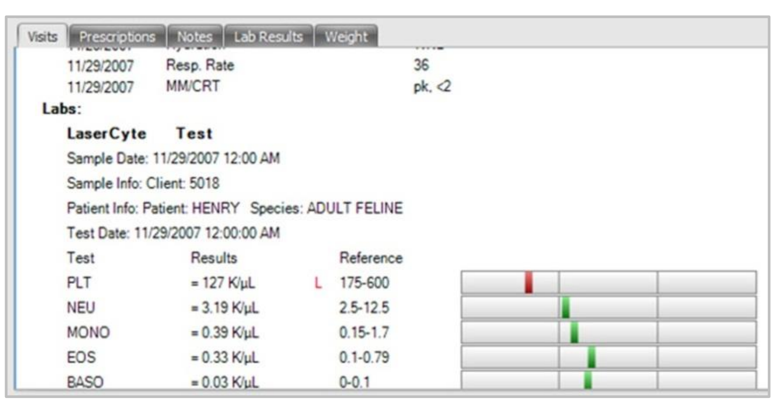
Patient Status:

- In Control Center, right-click on the client/patient Visit line.
- Click Go To | Patient | Medical History.

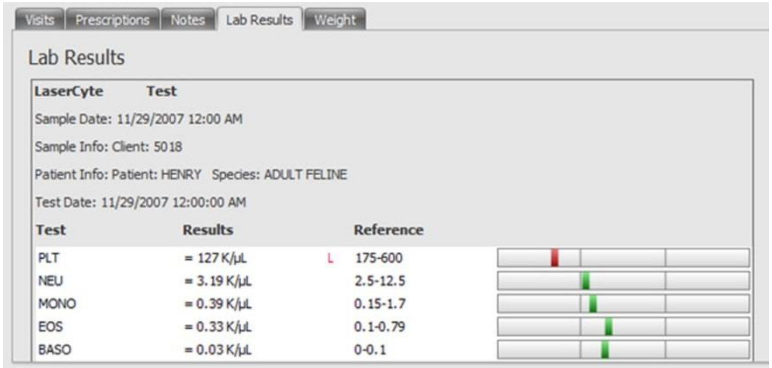


You can view the Lab Results three ways.

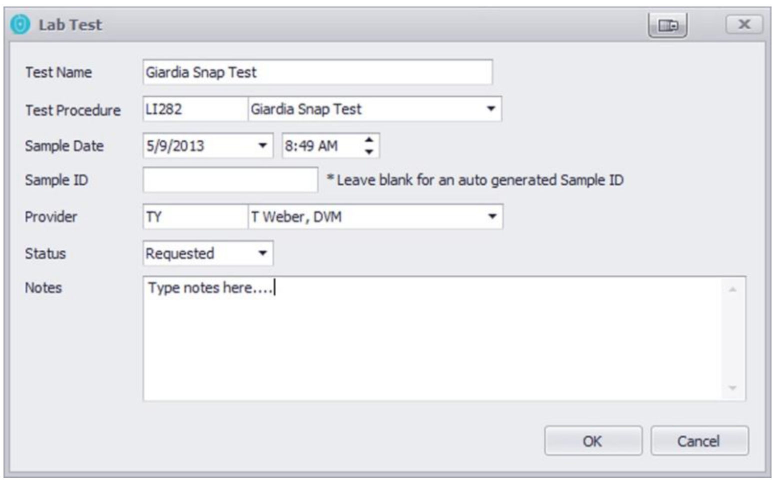
- In the **Visits** tab (by scrolling).



- **Lab Results tab.**

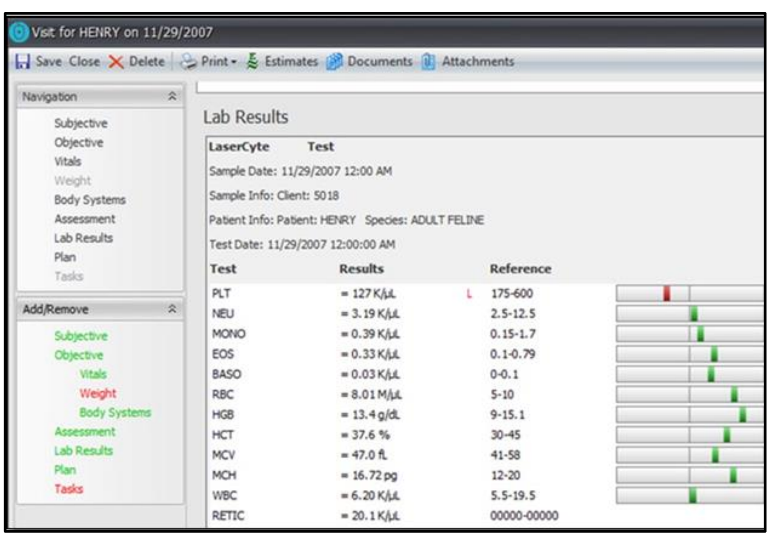


- **Right-click and choose from the following options:**
  - **Edit**



  - **Delete**
  - **Print**

- Select **Lab Results** in the **Navigation** pane to get to the Lab Results within **Medical History**.

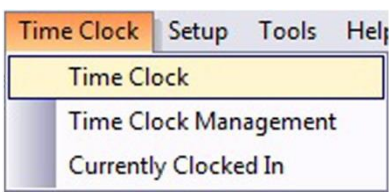


Time Clock

The time clock is not functional until the following areas are set up: User Setup (operator IDs and passwords), Job Setup (operator roles) and security levels for all your employees (refer to the Security chapter), as well as setting enabling security within the General Branch Setup. (refer to the General Branch Setup chapter). Username and password within the General Branch Setup is required for use of the time clock.

Clock In

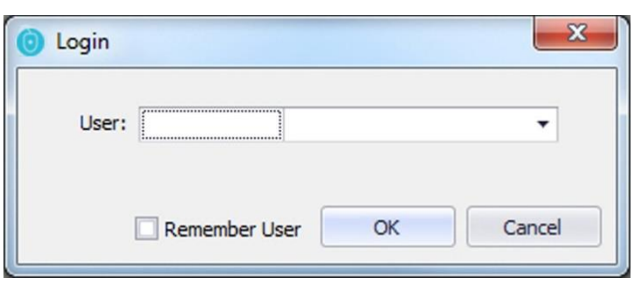
- From the IntraVet Menu Bar, select Time Clock | Time Clock.



The login window will appear.

- To select the User, click the down-arrow.
- If requested, enter the associated Password. Click OK.

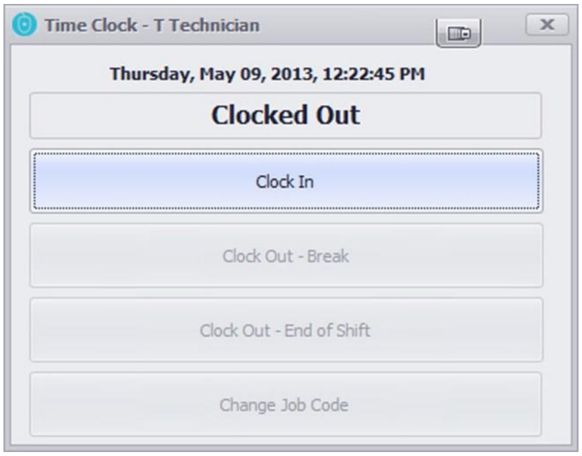
NOTE: Password is assigned within the User Setup window.



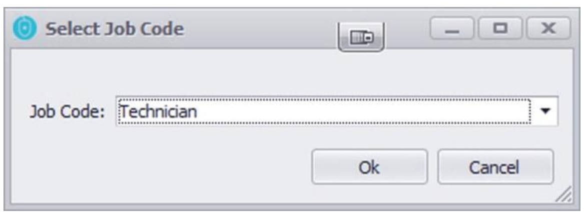
The Time Clock module will open and the User Name will appear on the title bar of the window.

- Select Clock In to take a snapshot and record the time the button was pushed.

NOTE: It shows the current status and only allows the next option. The screen shot below shows the Office Staff user is currently Clocked Out and only allows them to Clock In.

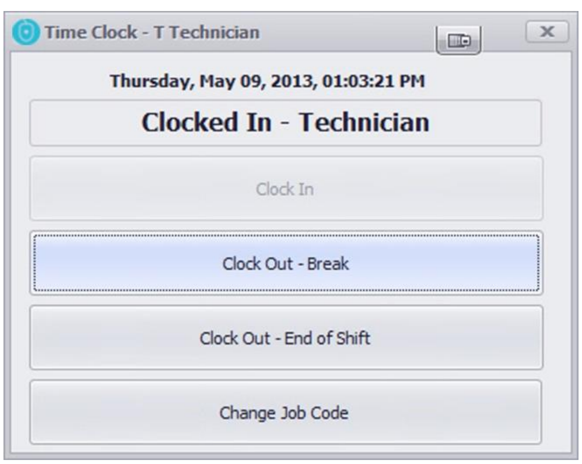


- Once you are clocked in, a Job Code must be selected. Use the down-arrow to select the correct job code.
- Click OK.

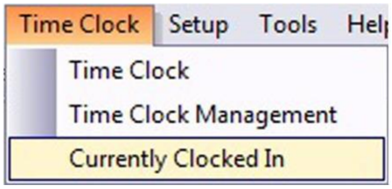


You are now clocked in.

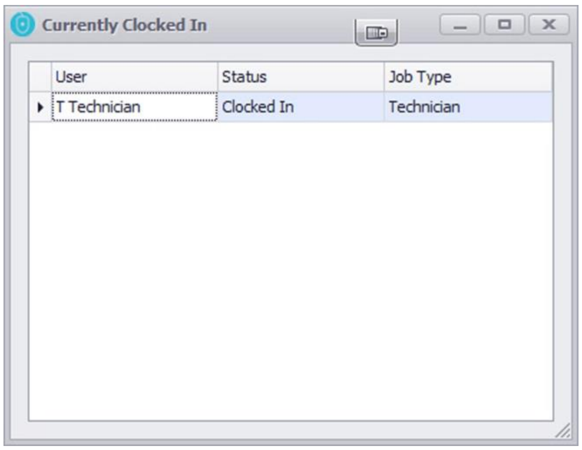
- Once you are clocked in you have three options:
    - Clock out for a Break.
    - Clock out for the End of Shift.
    - Change Job Code.



- To confirm that you are clocked in select Time Clock | Currently Clocked In.

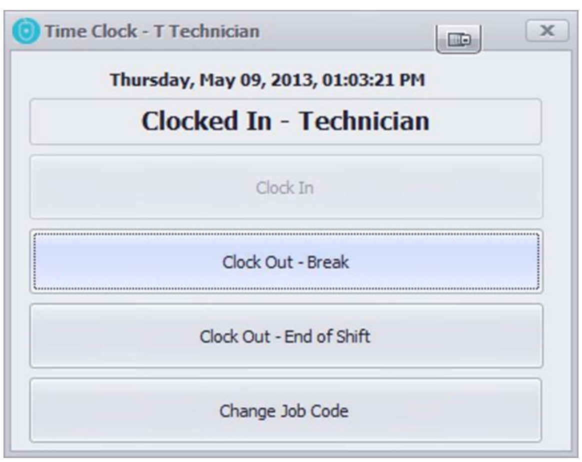


- This will provide a list of employees that are currently clocked in.



Clock Out – Break

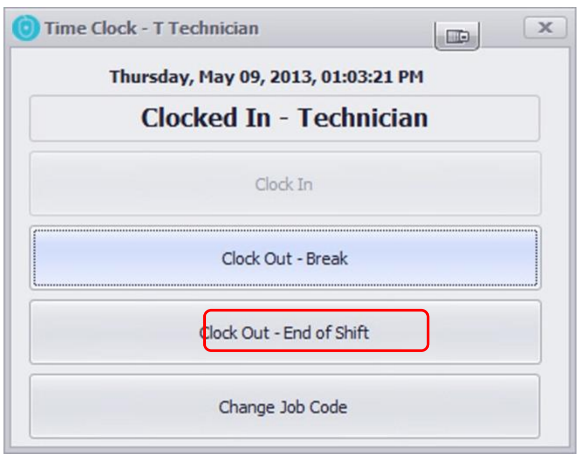
Clocking out for a break follows the same steps as clocking in.



- When the break is over and the employee returns to work, click the Clock In button.

Clock Out – End of Shift

This procedure also follows the same steps as clocking in.



Job Codes

Job codes are used with the Time Clock module, and also where security is set up based on the employee's job within the practice. This feature allows practices to track the number of hours worked in each job code. If you have an employee that works in two separate departments within the practice you can keep track of the hours worked in each department.

Change Job Codes

- Select Change Job Code to switch to a different operator role.

- Click the down-arrow and select the desired operator job code. Click to move it into the field.

- Select Time Clock | Time Clock, and enter the User to find the Job Code where they are Clocked In.

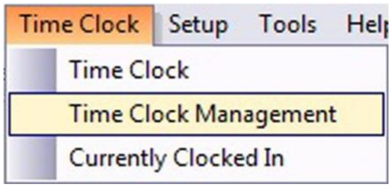
Time Clock Management

This feature allows for someone with the proper security settings to adjust timesheets as needed. For example, your technician clocked out but then stayed to assist with an after-hours emergency. Time Clock Management also is an audit feature so that you know when your employees are working overtime or perhaps leaving during their shift for personal reasons.

This displays every clock-in, break and clock-out for an individual employee each week.

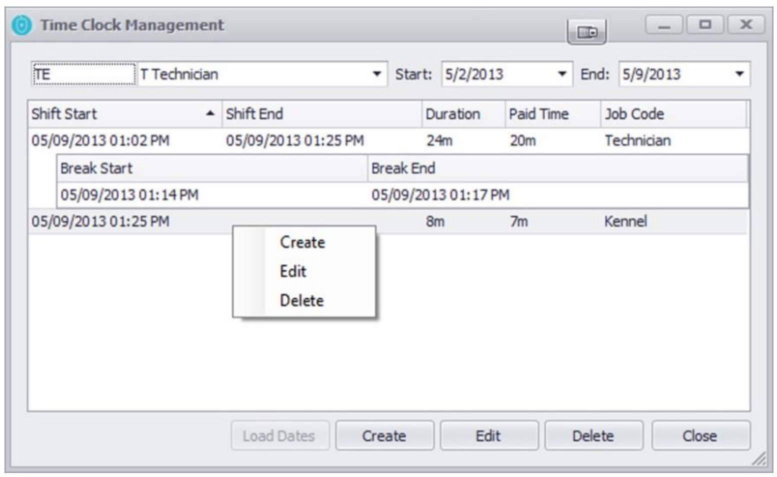
To Create, Edit or Delete a Time Entry:

- From the IntraVet Menu Bar, select Time Clock | Time Clock Management.

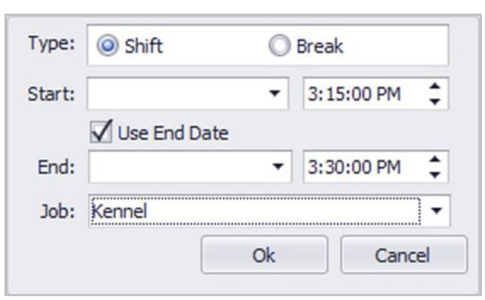


- Click the down-arrow and scroll to the employee's name. Double-click on the name to move it into the blank line.
- Right-click on any time entry in the grid and select Create, Edit or Delete to adjust the date and time. You can also use the buttons at the bottom once the time is selected.

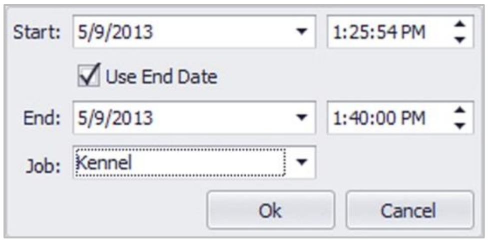
  Mo/day/yr, hr/min/AM-PM can be individually changed by clicking on each individual section.



- Click Create to create a new shift or break for a particular job function.
- Select the Shift or Break radio button.
- Select the Start and End date and time.
- Click the down-arrow to select the Job description.
- Click OK.



- Click Edit to make changes to a date, time or job description.
- Click OK.

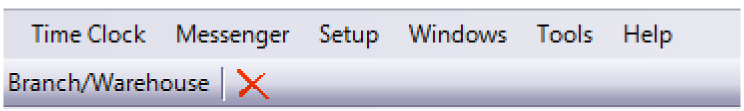


- **Click Delete to remove an entry.**

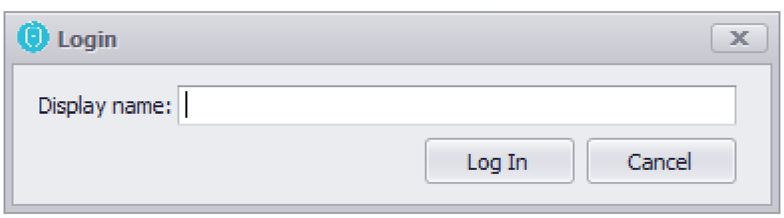
Messenger

The messenger is a great communication tool for your practice. The messenger can be used to inform the Veterinary Technician or Doctor that the patient is in the exam room, or to tell your reception that the patient is ready to be invoiced.

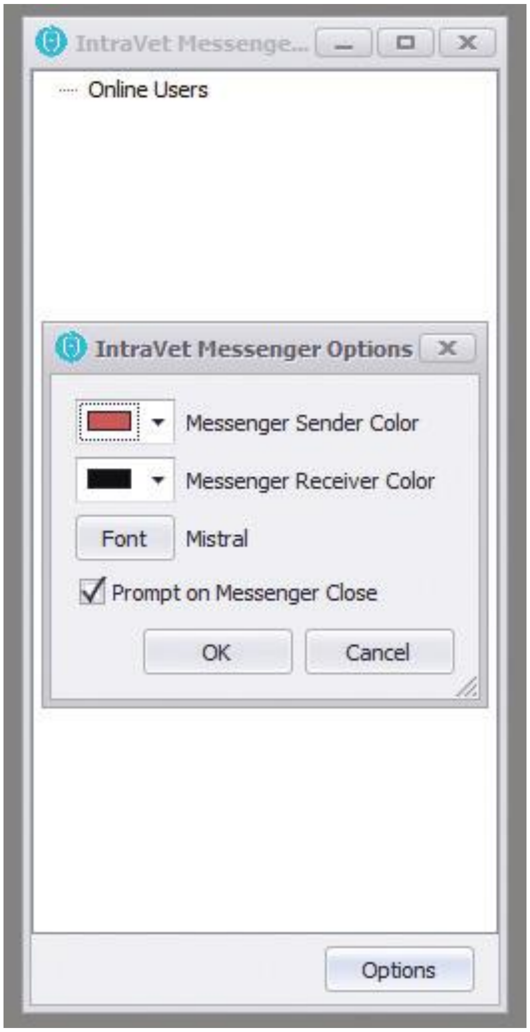
To open Messenger, click the Messenger option on the main tool bar at the top of the screen.



Key in the display name you would like to show in the online users list. Some practices have employees log in with their names, while others may choose to log in based on the computer being used (reception, kennel, etc.).



After you have keyed in your display name, the available online users list will display. If those users/employees are not logged in to their computer, you will not be able to message them until they log in to Messenger.
You can customize the Senders Font color and the Receivers Font color.   If you would like to receive a prompt when Messenger is closed, click the Options button located at the bottom of the online user list.



To chat with another user, double-click on their name within the Online user list and a messenger window will display. Type in the message and hit the Enter key or click Send to send your message. If you minimize the Messenger window, it will flash every time you receive a message to notify you.

Tools

Within the IntraVet software there are several types of tools that should be used cautiously. These are included in Utilities and Maintenance within the Tools menu. Most of these tools require exclusive use: the user running the utility can be the *only* user within IntraVet. The utilities and maintenance programs in this section can have a *major global impact* on the way your system operates.

NOTE: It is imperative to do a system backup prior to working with the Tools section of the IntraVet program.

Utilities

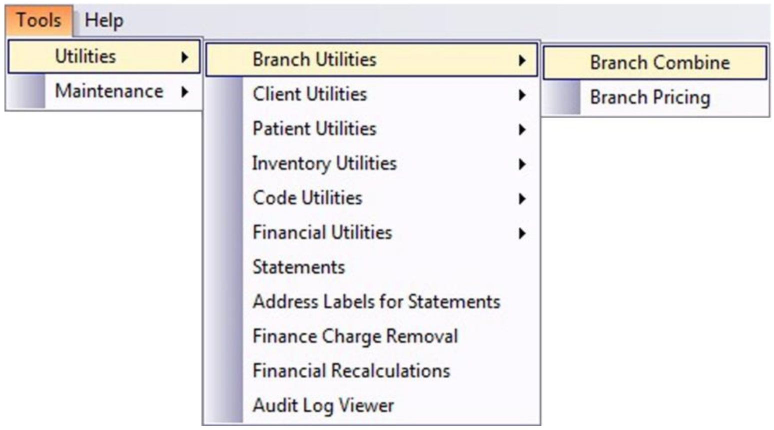
Branch Utilities

Before using Branch Utilities, make a full backup of your data.

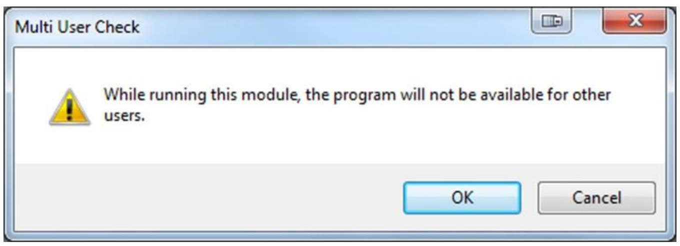
Branch Combine

The Branch Combine utility allows you to take all data associated with one branch and add it to another branch. This utility is useful when a branch is no longer needed: perhaps a branch was sold or closed. All setup items for the branch to be deleted (combined) are removed from the system.

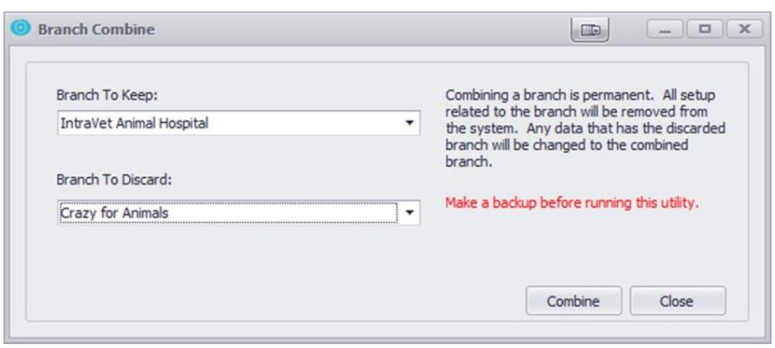
- From the IntraVet Menu Bar, select Tools | Utilities | Branch Utilities | Branch Combine.



You will receive a message advising you about program inaccessibility during this procedure.



- Click OK. The next window is an important warning to alert you that combining branches is permanent.
- Use the down-arrow to select the branch that will receive all the data from the branch that is going to be deleted.
- Use the down-arrow to select the branch whose data you want to combine into the branch that is being kept, and click Combine.

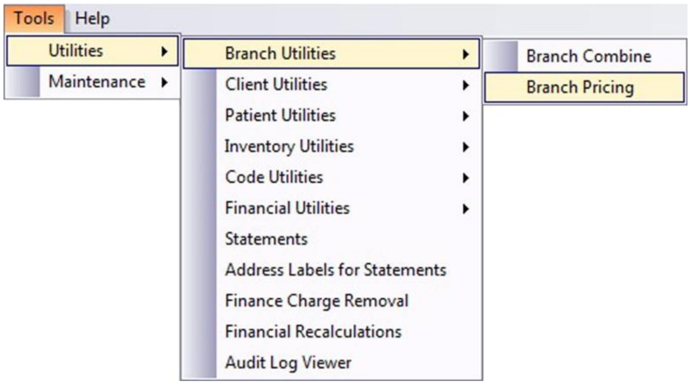


You will receive a prompt when the utility is completed and the branches are combined.

Branch Pricing

Branch codes are stored separately. However, the pricing structure from one branch can be copied to another branch.

- From the IntraVet Menu Bar, select Tools | Utilities | Branch Utilities | Branch Pricing.

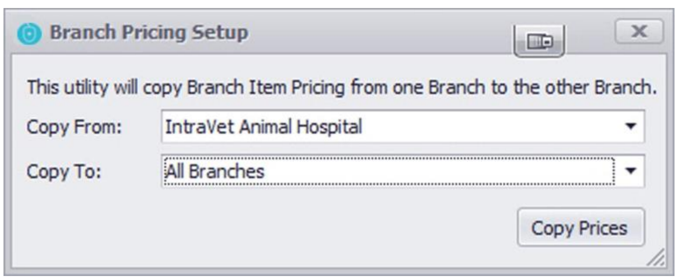


The default is separate Branches have their own pricing structure.

- To copy the pricing structure from one Branch to another, click the down-arrow to select the branch you want to Copy From.

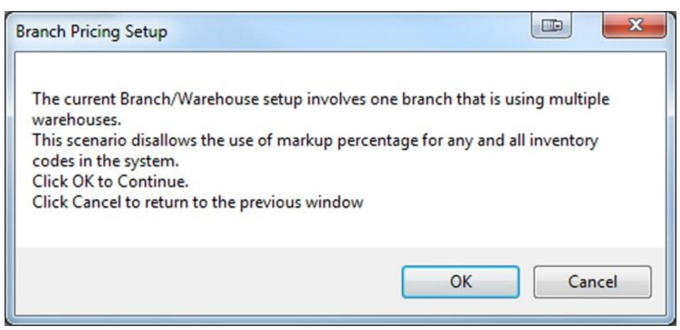
Do the same for the Copy To field to select the second Branch.

- When you have verified that you have the correct Branches set up for the "to and from" order, click Copy Prices.



A warning screen will appear.

- Click OK to proceed. Click Cancel to return to the previous window.



Client Utilities

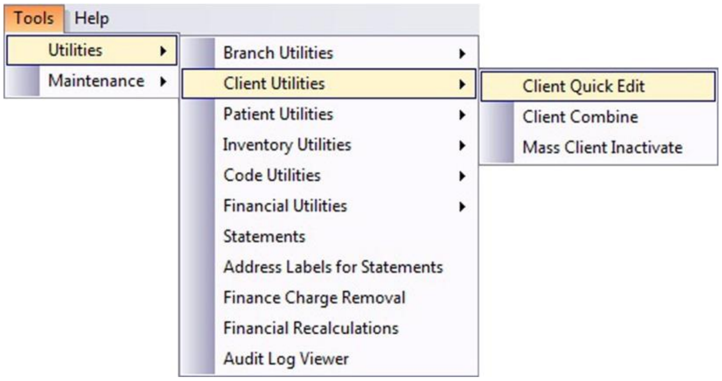
Before using Client Utilities, make a full backup of your data.

Client Quick Edit

Client Quick Edit globally changes client information. You can create a profile with selections from several fields and apply the profile globally or individually to each client.

Client Quick Edit global changes for all clients: All options are selected (check marked) by default.

- From the IntraVet Menu Bar, select Tools | Utilities | Client Utilities | Client Quick Edit.



- Click the red flag to highlight the options and check the box or radial dial to select to apply to your selected clients.

Global changes may update clients you have individually set to another value.

Financial

- Tax
- Billing Fee
- Interest
- Statement Message

Statements

- Summary
- Detailed
- No statement

Terms

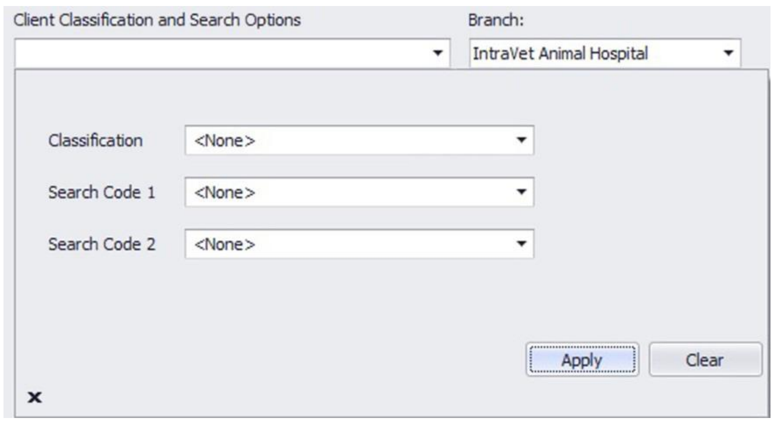
- COD
- 30Days
- 60Days
- 90Days

- Enter a dollar amount to set a Credit Limit.
- Enter a Discount %.
- Click the down-arrow to select the Client Classification and Search Options you want used.
  - Classification – Includes items such as:
    - Bad Check Passed
    - Bankrupt
    - Gold Star Client
    - Written Off
  - Search Code 1 – Includes items such as:

- Breeder
- Farm Client
- Senior Citizen
- Trainer

- Search Code 2 – Includes the same items as Search Code 1. It affords you a second search criteria.

- Select the Branch.
- Click Apply.



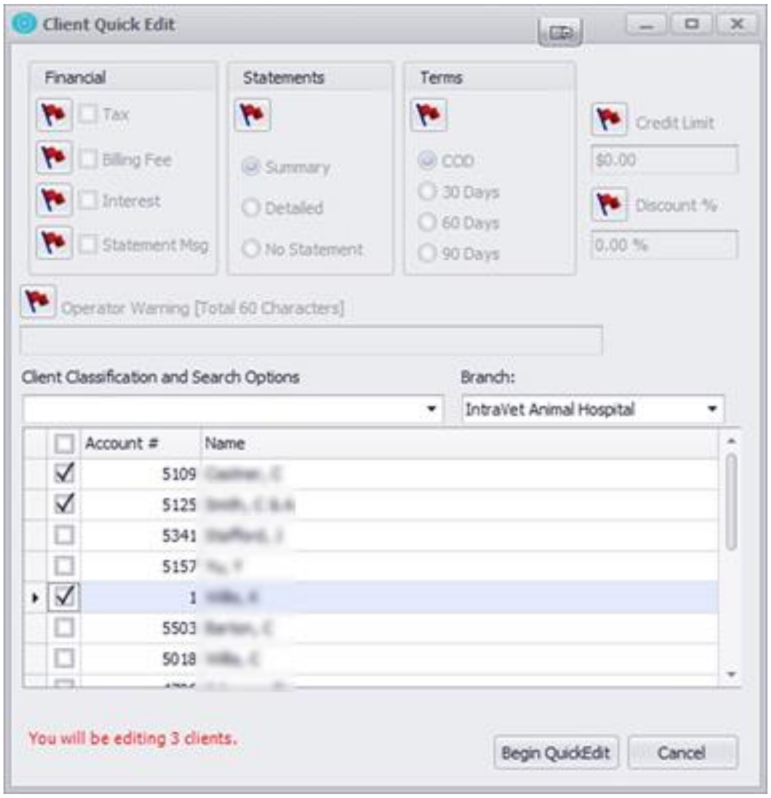
- Select the Clients you would like included. If you want to apply changes to all clients, check the box next to Account.

  A message in red displays at the bottom of the window to indicate how many clients' settings will be changed.

- When you are ready to apply these settings to all those clients, click Begin QuickEdit.

  You will *not* receive a second chance warning that you are about to change settings on specific clients in your database.

  QuickEdit cannot be stopped once the button is clicked. The program makes the changes and prompts that the Client Update Succeeded when complete.



Client Combine

Combine Data for Two Clients:

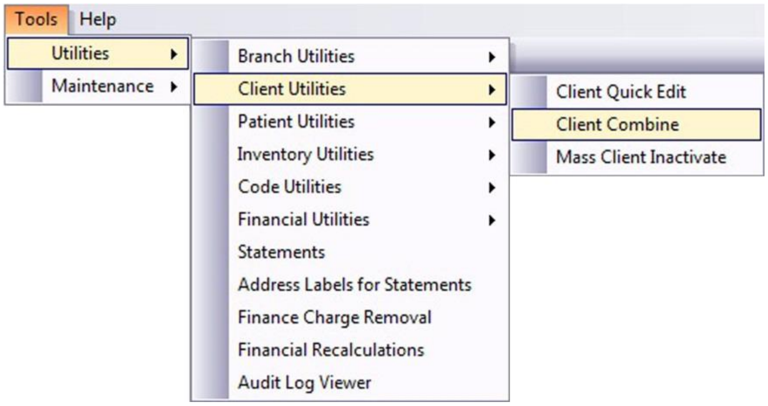
Duplicate clients or two clients who want to be combined into one account can be combined using Client Combine.

When you combine two accounts, the patients from the account to be combined are moved to the account to be kept and completely removed from their original account. The second account is inactivated and still exists, but the patient(s) no longer belong to that account after the accounts have been combined.

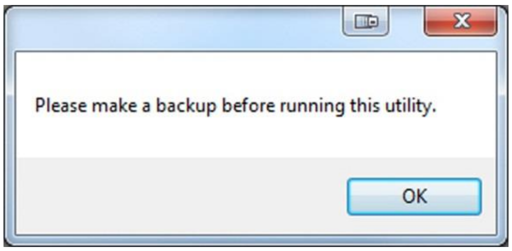
Combining accounts affects the accounts in several ways:

- Patients with the same names are combined into one patient.
- The medical history of each patient is transferred to the account to be kept.
- History and recalls for pets with the same name in both accounts are checked, corrected, and updated.
- Financial transactions are combined. If the second account has a balance, the balance transfers to the first account.

- From the IntraVet Menu Bar, select Tools | Utilities | Client Utilities | Client Combine.



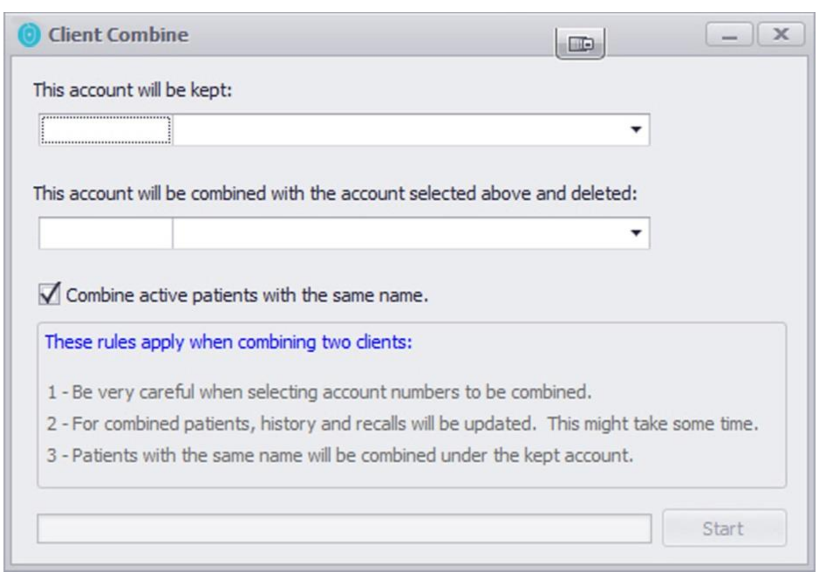
You will be prompted to make a backup before running this utility.



- Enter the first account number (the client number to be kept). Select the down-arrow, or double-click anywhere in the blank entry line. Then, scroll to your choice and double-click on the name to move it into the blank entry line.
- Enter the second account number (the client number to be inactivated).
- Click Start.
- Client Combine Completed Successfully will prompt when the utility is completed.

Be cautious selecting account numbers as first and second.

You will need exclusive use of the program when running this utility.



Mass Client Inactivate

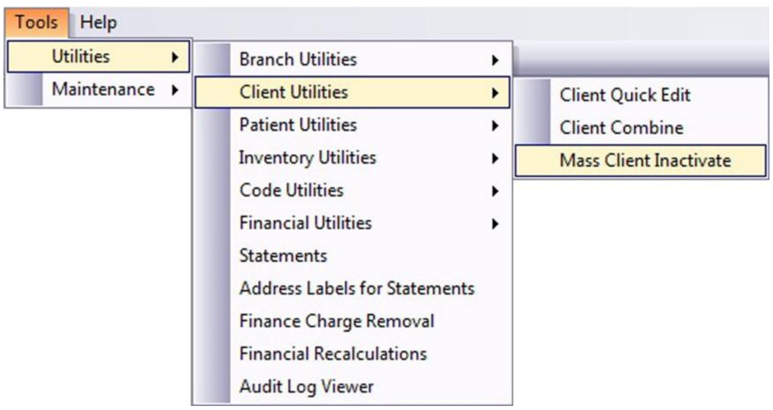
Mass Client Inactivate is a serious undertaking. It will inactivate clients, patients, histories, and financial information for the clients who fit the selected criteria.

You can inactivate clients with no activity since a certain date. This means that *all clients with no invoices* after the selected date are inactivated. Debit or credit transactions or returns and refunds are not considered an activity. You must enter a date for this function.

So that productivity and financial reports are maintained intact, IntraVet will not allow you to purge the current year or the immediate past two calendar years. This cut-off date will be displayed within the dynamic text at the bottom of the window, and it will change according to the current year of operation.

You must make a full backup before running this utility. Once clients are inactivated, your only option is to restore the data from backup data.

- From the IntraVet Menu Bar, select Tools | Utilities | Client Utilities | Mass Client Inactivate.



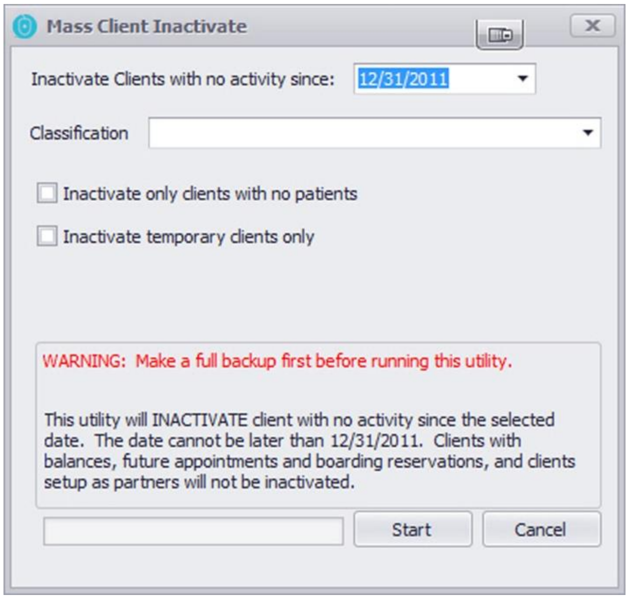
- Either enter a date in the top blank entry line, or click the down-arrow and choose a date from the calendar.
- To select a Classification, click the down-arrow. Single-click to select.
- Place a check mark in the box to filter by:
  - Inactivate only clients with no patients.
  - Inactivate temporary clients only.

Make a full backup of your database before starting this utility.

- When you are ready to start this utility click Start.

When you run this utility, clients with balances, clients with future appointments or boarding reservations, and clients set up for split billing will not be inactivated.

If the utility is aborted or interrupted while running, it will have inactivated only the clients listed up until the time it was stopped.



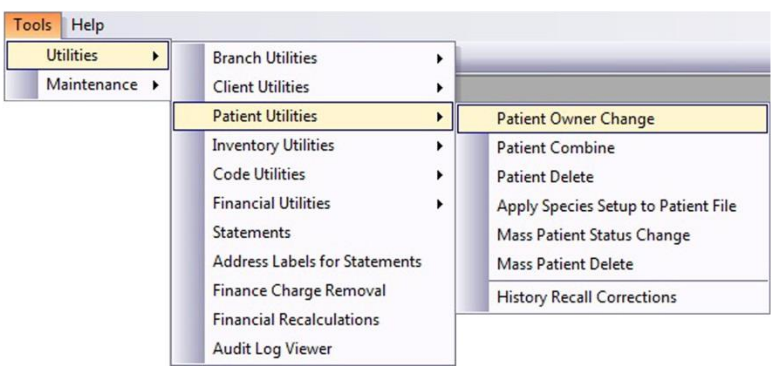
Patient Utilities

Before using Patient Utilities, make a full backup of your data.

Patient Owner Change

Patient Owner Change will move the patient, history, logs, and reminders, to another client's account. The invoices and financial records will remain with the original client. Before running the patient owner change utility, make sure that the new client exists in your system. All financial responsibility prior to the transfer will remain with the original owner.

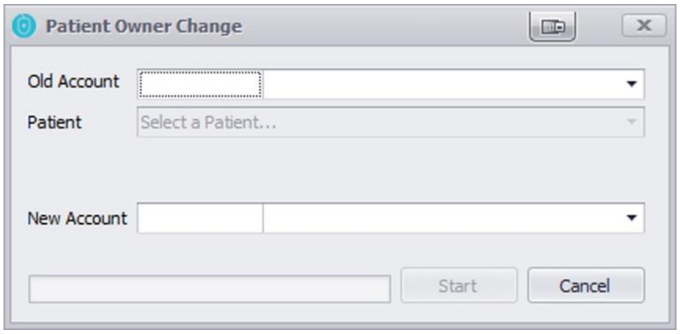
- From the IntraVet Menu Bar, select Tools | Utilities | Patient Utilities | Patient Owner Change.



- Select the client by entering the Old Account number or name. Enter the first few letters of the client's last name. Double-click on the correct name to move it into the blank entry line.
- If the client has multiple patients, the first patient name appears in the Patient field. Click the down-arrow to choose a different patient.
- Select the new client by entering the New Account number or name as described above.
- Click Start.

You will see a progress bar across the bottom of the Patient Owner Change screen as the records are transferred.

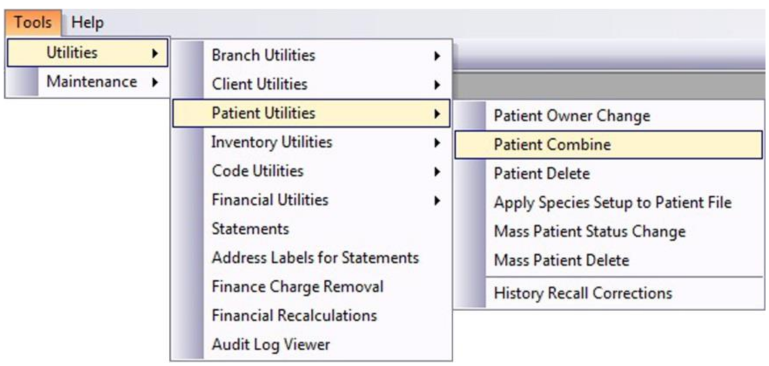
If you do not want to change patient owners, click the X (before you click Start) in the upper right corner of the window to exit.



Patient Combine

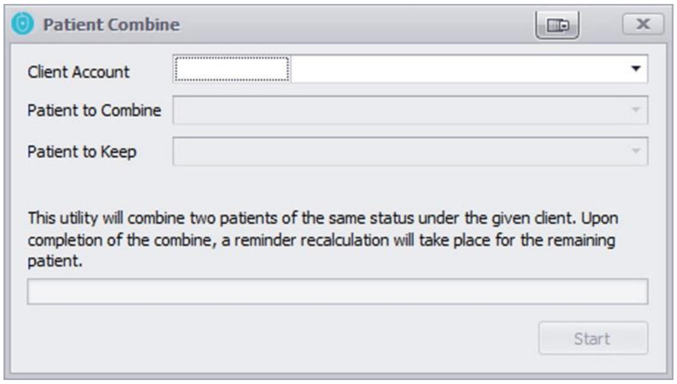
This utility combines two patients that have the same status to one client. The program will recalculate reminders for the combined patient.

- From the IntraVet Menu Bar, select Tools | Utilities | Patient Utilities | Patient Combine.



- Select the client by entering the Old Account number or name. Enter the first few letters of the client's last name. Double-click on the correct name to move it into the blank entry line.
- Select the first patient name in the Patient to Combine field. Click the down-arrow to choose the correct patient.
- Select the Patient to Keep by clicking on the down-arrow and choosing the patient's name.
- Click Start.

You will see a progress bar across the bottom of the Patient Combine screen as the patient's record is transferred.



Patient Delete

When a patient is deleted, unless you choose to "archive" the patient data, all patient related data is permanently deleted from the system. The patient will be deleted permanently, but its history will be written to an archive file, and you will be able to access all data in the pet history for display or print, except the images and referral letters. Once a patient is removed from the system it cannot be reactivated. There is a record made to the deletions list that provides:

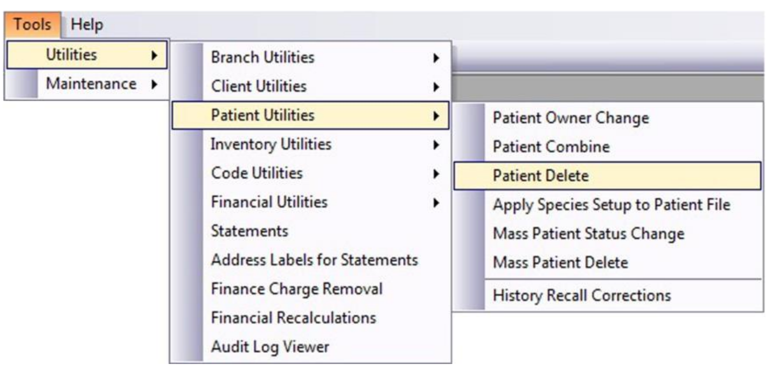
- The date the patient was deleted, and
- The operator ID of the person who deleted the patient.

Consider inactivating the patient instead of deleting if you wish to have access to the patient's medical history.

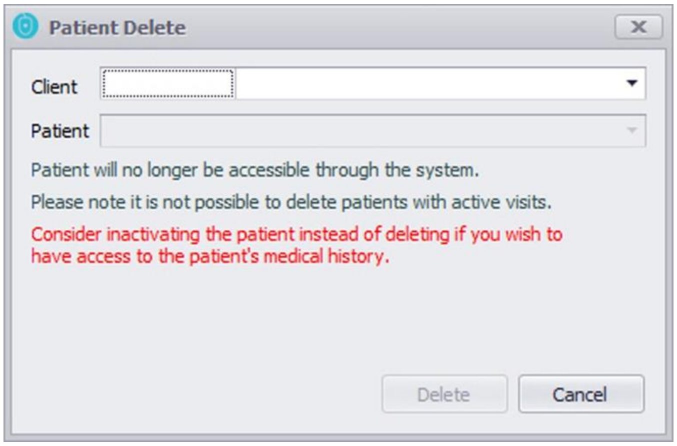
The client and patient statistics report does not include archived patient information.

Tag ID and Vaccination list reports will not include archived patients.

- From the IntraVet Menu Bar, select Tools | Utilities | Patient Utilities | Patient Delete.

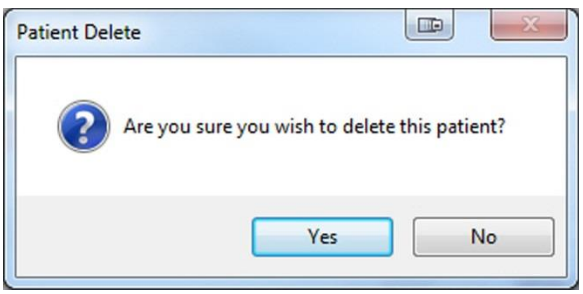


- Select the client by entering the account number or name. Enter the first few letters of the last name, or double-click anywhere in the blank entry line. Scroll the list and double-click on the desired name to move it into the entry line.
- If the client has only one patient, that name will appear in the Patient field. For multiple patients, select the down-arrow and choose the correct patient.
- Click Delete.
- Confirm the deletion by clicking Yes or cancel by clicking No.

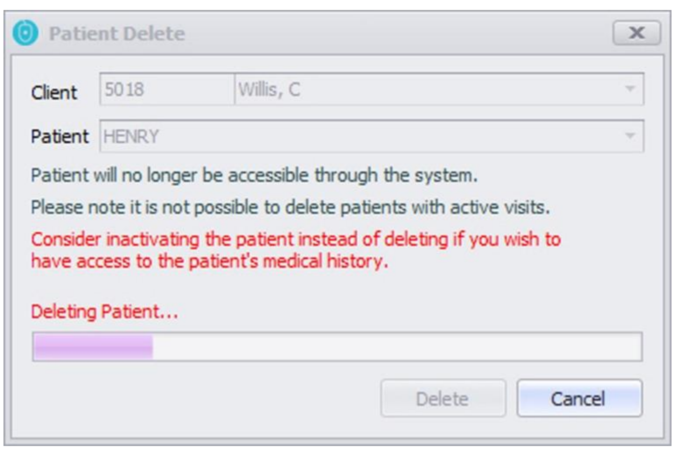


Example One:

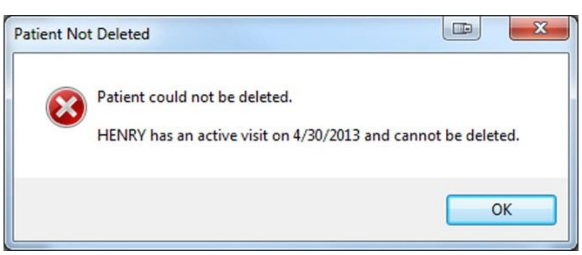
After you click Delete, the following message appears if the patient that is being deleted has any active visits.



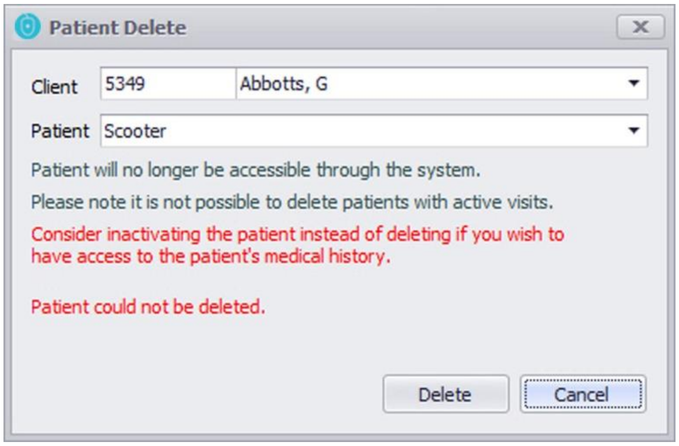
- Click Yes. The Patient Delete screen appears showing a Deleting Patient progress bar for the patient being deleted.



If the patient that is being deleted has any open visits or invoices a message will appear that states the patient has an active visit. It provides the date and informs you they cannot be deleted.



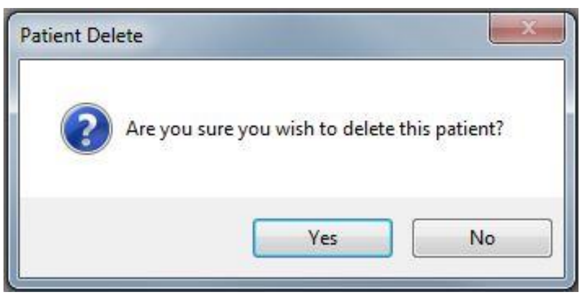
- Click OK, and the following message will appear.



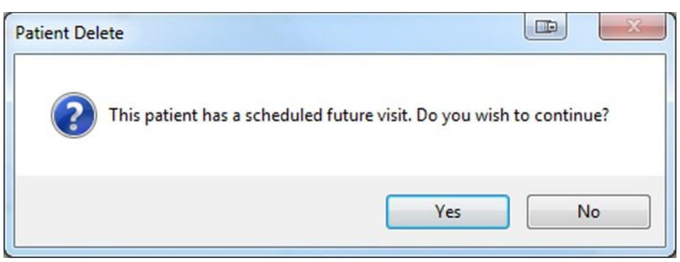
- Click Cancel. The Patient Delete message will go away.

Example Two:

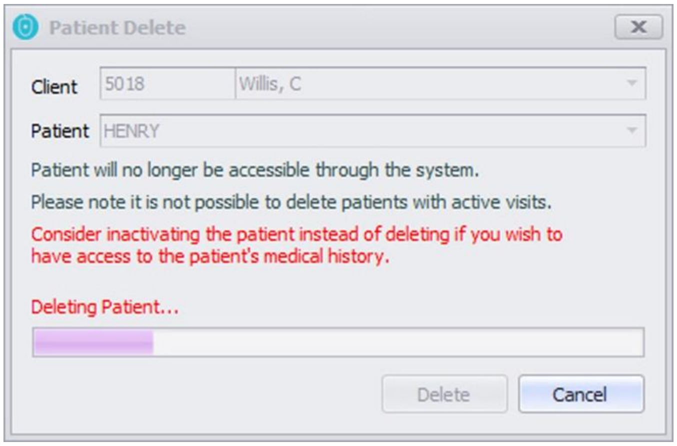
After you click Delete, the following message appears if the patient that is being deleted has any future visits.



- Click Yes. Patient Delete message appears.

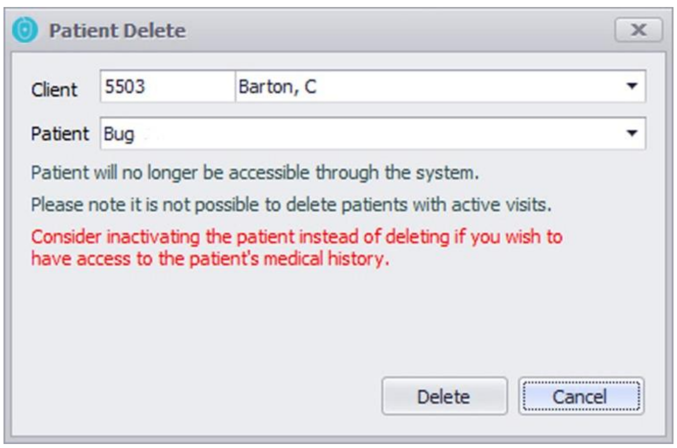


- Click Yes. A progress bar appears.



The selected patient is deleted.

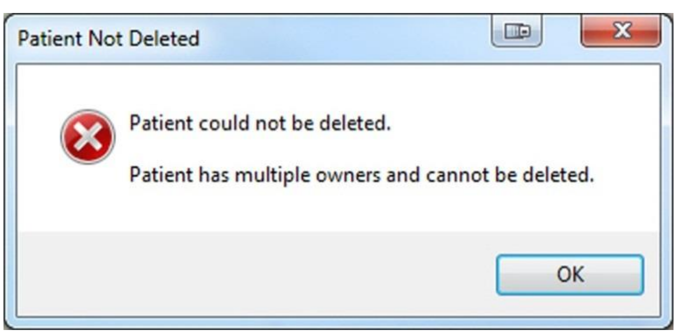
- Click No. The following message will appear.



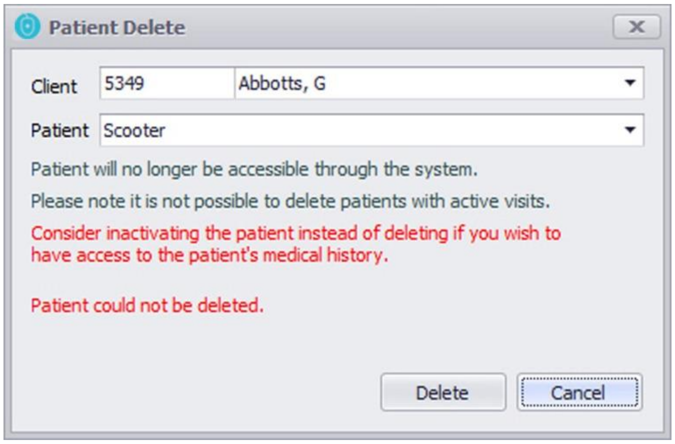
- Click Cancel.

Example Three:

- After you click Delete, the following message appears if the patient has multiple owners.



- Click OK, and the following message will appear.



- Click Cancel.

Definition of List Boxes

Client – You select the client account of the patient that will be deleted from the system.

Patient – Is the patient that is to be deleted from the system.

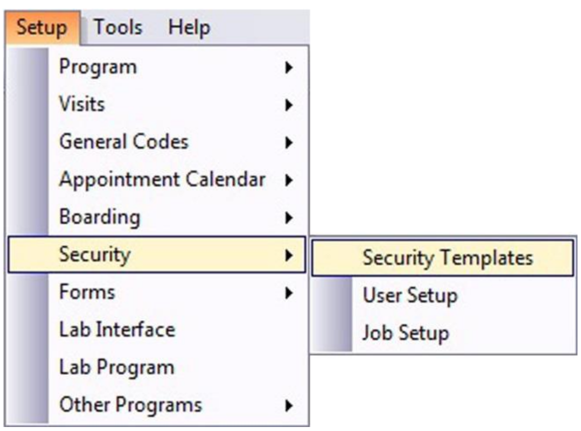
Delete – Removes the selected Patient from the system.

Cancel – Closes the screen without saving changes.

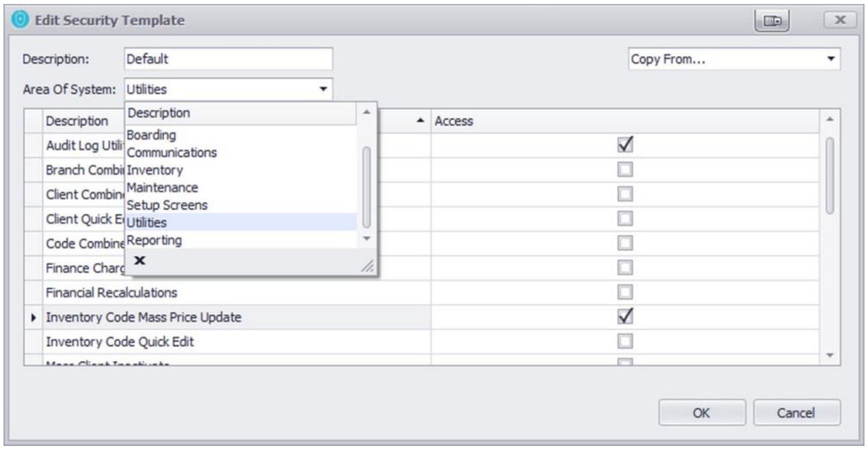
<u>Security</u>

You must have security options/permission to access and run the utility.

The patient delete option must be checked under Setup | Security | Security Templates.



- Select the template to which you need access.
- Go to Area of System | Utilities, and check the Patient Delete box.
- Click OK to save.



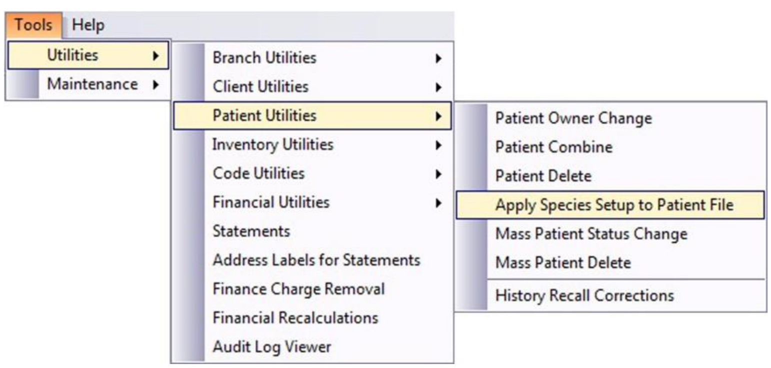
Multi-User

Running the utility requires exclusive use.

Apply Species Setup to Patient File

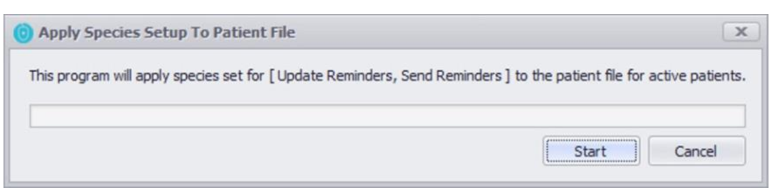
The patient variables Keep Medical History, Update Reminders, and Send Reminders may be preset by species. As you enter a patient into the database, the variables are preset according to its species. Species are set up in Setup/General Codes/Patient. This utility function applies the changes that you made in your species setup to all patients in your database.

- From the IntraVet Menu Bar, select Tool | Utilities | Patient Utilities | Apply Species Setup to Patient File.



- Click Start to apply the presets.

Click Close any time prior to clicking Start if you want to exit without making changes; otherwise, a progress bar activates, and the window closes when the task finishes.

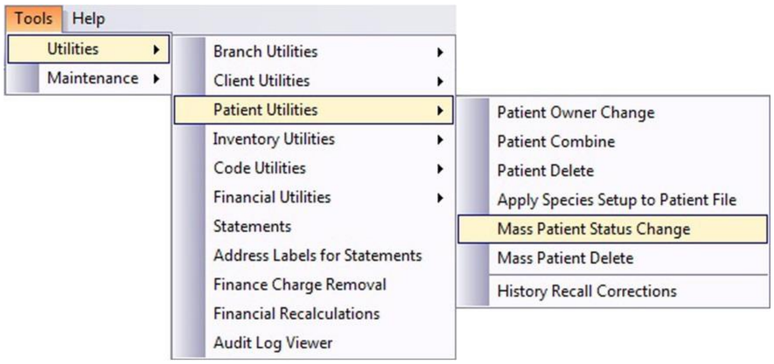


Mass Patient Status Change

This utility changes patient status from "active" to the selected status option. The objective is to mark the patients that have been inactive in your system for some time and move them to inactive status so that they will not be included in reminders and searches for mailings.

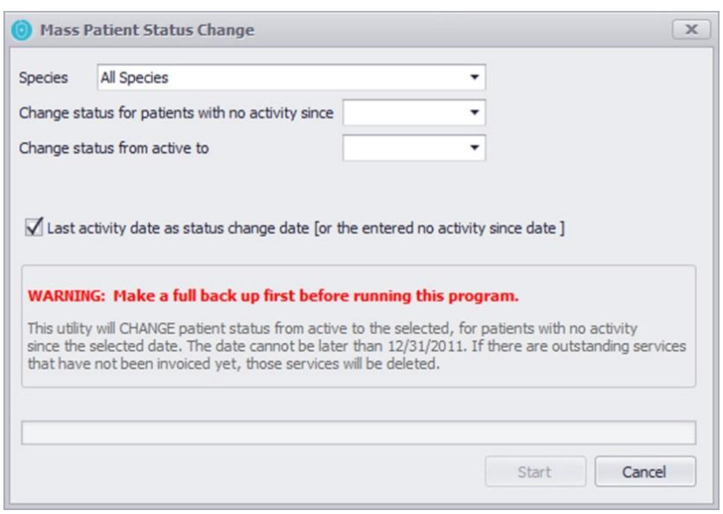
NOTE: It is strongly recommended that you do a full backup of your IntraVet system before running this utility.

- From the IntraVet Menu Bar, select Tools | Utilities | Patient Utilities | Mass Patient Status Change.



- Enter a species code or description to select the species you want to change, or scroll to your choice. Double-click on the name to move it in the blank entry line. (The screen will default to All Species.)
- Enter a date for Change status for patients with no activity since, or use the down-arrow to select a date from the calendar. The date cannot be later than 12/31/2011.
- Either double-click in the blank entry line or use the down-arrow to select the status you want to apply to the group of patients.
- If you establish a date above you can uncheck the Last Activity box.
- Click Start to begin the status change utility.

  It is strongly recommended that you make a full backup of your data files before starting this utility.

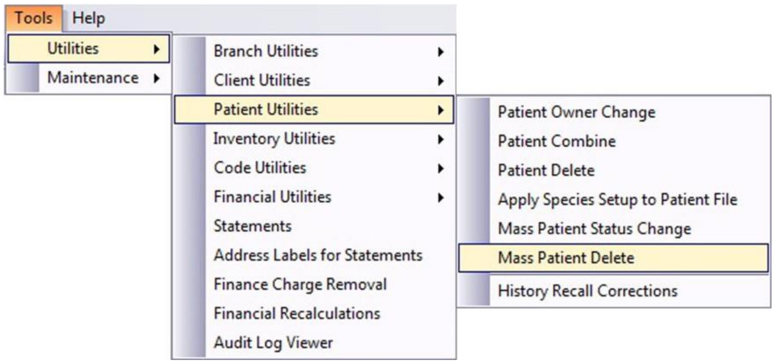


Mass Patient Delete

This utility removes patients, patient demographics and medical histories for patients that fit the selected criteria; however, only data stored in your computer *prior to* December 31, 2011 can be mass deleted.

This is useful to remove patients that have not been in your practice for a long span of time, for example, and those that have had a change in their status, e.g., patient was given away. These two options must be run at separate times.

- From the IntraVet Menu Bar, select Tools | Utilities | Patient Utilities | Mass Patient Delete.



- Select the species you want to change in the Species to Delete entry line. Enter the code or description, if you know them, or make your selection from the list. Double-select your choice to move it in the blank field. System defaults to <ALL>.
- Under Delete Patients with… you can select an option, then enter a date or choose a date from the drop-down calendar. Remember, the date must be before 12/31/2011.
- Select one of the following:
  - No Activity Since
  - Status Changes On or Before

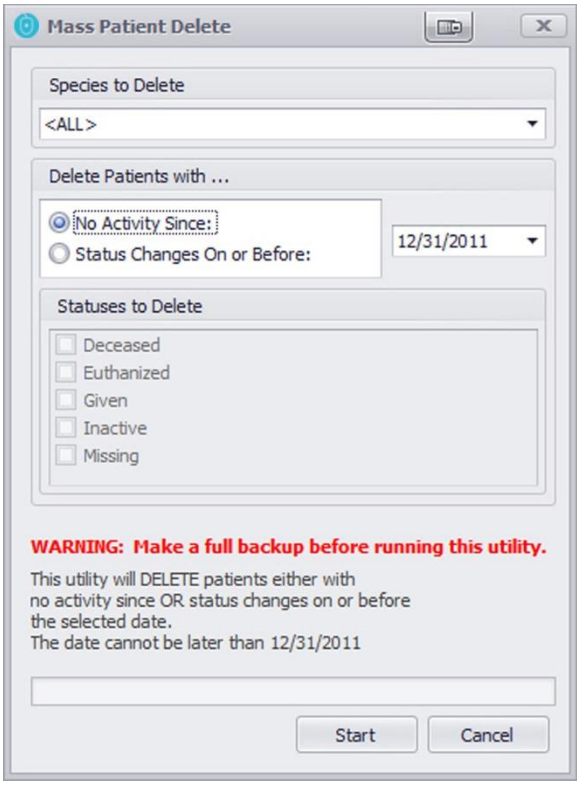
This activates the third section of filters. Click in each box to remove patients with those statuses.

- Click Start.

To run a second file purge:

- Repeat the steps from above.

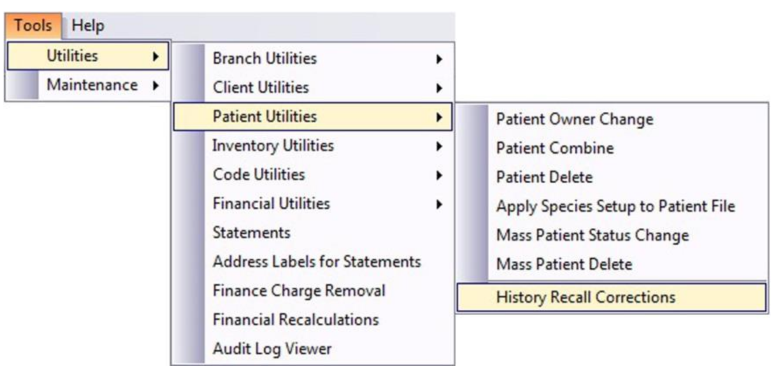
It is strongly recommended that you make a full backup of your data files before starting this utility.



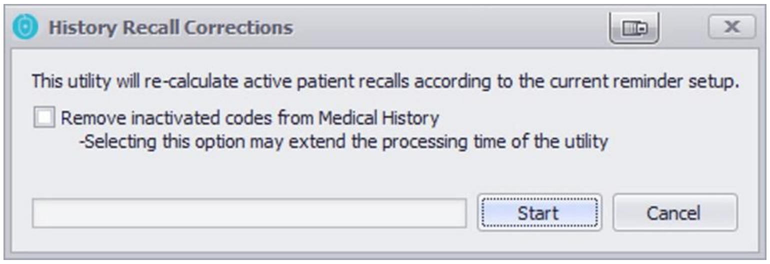
History Recall Corrections

History and Recall Corrections applies all current reminder settings to patient history files. If you have made changes to the reminder relationships or intervals in your codes, those changes will only be effective from the date of the change forward. This utility must be run to correct older patient reminders so that they will reflect the new settings.

- From the IntraVet Menu Bar, select Tools | Utilities | Patient Utilities | History Recall Corrections.



- Check the box to Remove inactivated codes from Medical History if you want to discard codes no longer in use.
  - If this option is selected it may extend the processing time of the utility.
- Click Start, or if you do not want to run this utility, click the X in the upper right corner of the window to exit.



Inventory Utilities

Before using Inventory Utilities, make a full backup of your data.

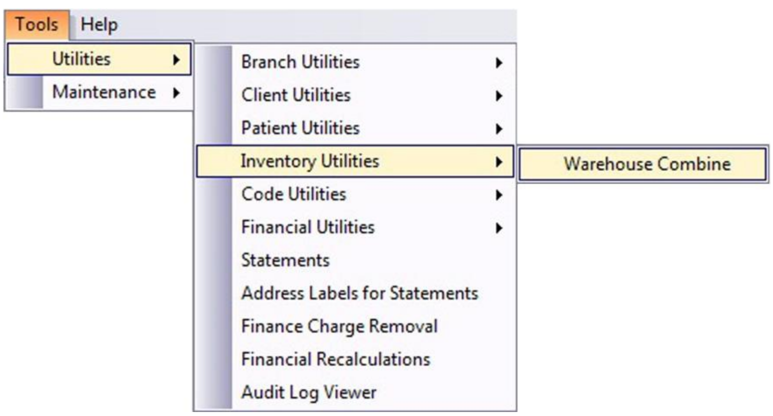
When you have more than one warehouse, you can transfer one warehouse's entire inventory into another warehouse. This is useful when, for example, a warehouse is being closed.

Warehouse Combine

This utility combines warehouses by moving the quantities on-hand from a second warehouse into the first warehouse.

Alert your staff that IntraVet will be unavailable while this utility is running.

- From the IntraVet Menu Bar, select Tools | Utilities | Inventory Utilities | Warehouse Combine.

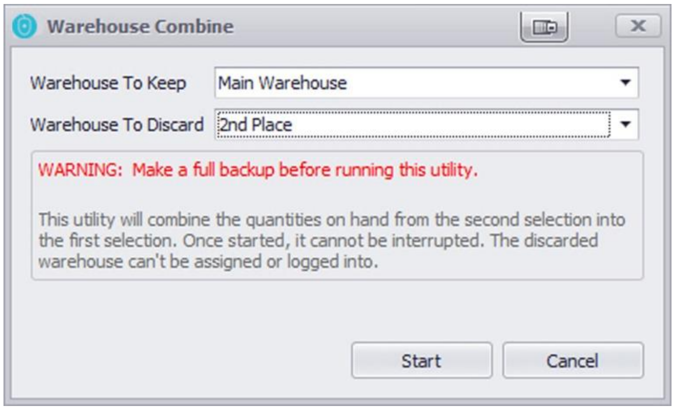


- Use the down-arrow to select which Warehouse to keep.
- Use the down-arrow to select which Warehouse to discard (and whose inventory will be transferred to the kept warehouse).

It is strongly recommended that you make a full backup of your data files before starting this utility.

This utility *cannot be stopped once the Start button is clicked*. The program makes the changes and automatically closes the window.

- Click Start.



Code Utilities

Before using Code Utilities, make a full backup of your data.

When working in this section, be aware that there is no re-do if you make a mistake. For example, you set a $15.00 price increase on an inventory item and saved your update. Later, you realize that you really meant to increase it by only $1.50.

Your options are to use your backup and restore your data; then, perform the update again or to manually re-price each of your inventory items.

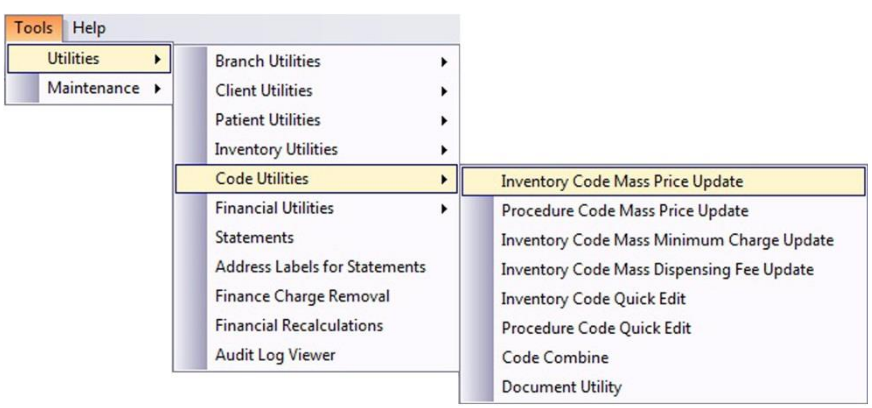
Inventory Code Mass Price Update

You can update your inventory prices by amount or percentage. You can select by department, perform a global update, or browse through the codes and update the selling price and cost individually.

You may also select to apply changes to only non-zero prices and select a rounding option (nickel, dime, or dollar).

If you want to have the new pricing reflected automatically in your estimate templates, you must use Update By Amount or Update By Percentage.

From the IntraVet Menu Bar, select Tools | Utilities | Code Utilities | Inventory Code Mass Price Update.



When you enter the utility, one code will be selected and the selling price will be enabled. The increase by amount will be disabled until you highlight multiple codes. When multiple codes are selected the selling price will be disabled since it is only relevant when an individual code is selected.

To select multiple codes:

- Hold down the Ctrl key to highlight and select multiple (non-consecutive) codes.
- Hold down the Shift key to highlight and select multiple (consecutive) codes.

Price updates done in this utility update estimate templates to the new selling price.

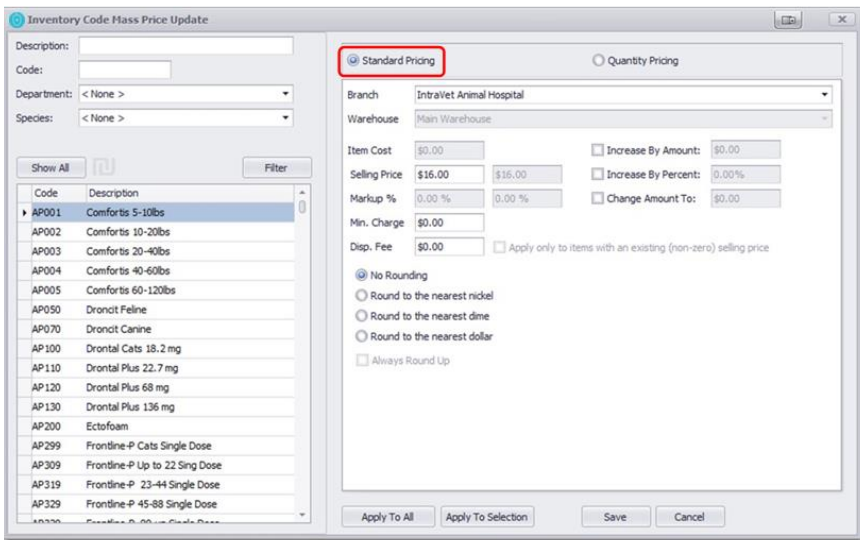
The settings for the inventory codes are originally set up under Setup | General Codes | Inventory.

In the utility:

- Min. Charge and Disp. Fee fields contain values by default.
- Markup %, Min. Charge and Disp. Fee are:
  - Enabled if one code is selected.
  - Disabled if multiple codes are selected.

Standard Pricing

Standard Pricing is normal pricing. It usually involves a single item with only once price for that item, regardless of weight or species.



- Description – Explanation of item.
- Code – Alpha/numeric numbering that identifies the Description.
- Department – Section of your practice.
- Species – Type or variety of animal.

Action

- Show All – Shows all the Inventory codes set up within IntraVet. If there is a filter set and you click Show All, it ignores the filter and shows all the inventory codes.
- Filter – Filters the Inventory codes to only show those that meet the requirements added for Description, Code, Department, and Species.

Location

- Branch – Allows you to change branches to update codes.
- Warehouse – Allows you to change warehouses to update codes. The warehouse list defaults to the Main Warehouse. If there are multiple warehouses they will display in a drop-down list.

Updates

- Item Cost – Displays the actual Cost of the item. It is always disabled.
- Selling Price – The price that is normally charged clients for this item. The maximum value is $999,999,999.99. It has two list boxes:
    - The first box (next to selling price) is enabled. List the new selling price for the selected code/codes.
    - The second box is disabled. It shows the selected code's current selling price.
    - Markup % – Markup percentage is limited by the maximum value of the new selling price.
    - The new selling price cannot exceed a maximum value of $999,999,999.99.
    - Percentage markup for an inventory item. Should be 9,999.99%.
    - Min Charge – The lowest amount to be charged for an item. When the quantity, multiplied by the price, equal to or over the minimum charge, only the price per unit is charged. The maximum value is $999,999,999.99.
    - Disp. Fee – When creating an invoice with a dispensing fee the amount listed for the line item is, the quantity multiplied by the price, plus the dispensing fee. The maximum value is $999,999,999.99.

The following fields are enabled if multiple codes are selected:

- Increase by Amount – Increases the selected codes by the amount entered into this list box. The maximum value is $999,999,999.99.

- Increase by Percent – Increases the selected code/codes by the percent entered into this box. Maximum value should be 9,999.99%
- Change Amount To – Changes the selected code/codes to the amount entered in this box. The maximum value is $999,999,999.99.

The following fields may be selected:

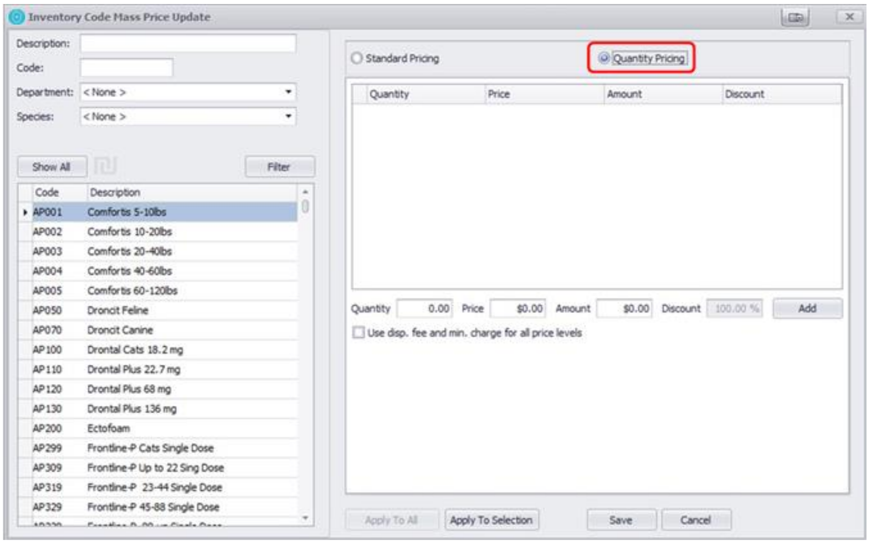
- Apply only to items with an existing (non-zero) selling price – Allows you to only update codes that currently have a selling price within the code setup. Leaving this unchecked updates all codes regardless of their current selling price.
  - Disabled if only one code is selected.
  - Enabled if multiple codes are selected.
    - No Rounding – Does not round prices. This should be selected by default.
    - Round to the nearest nickel – When selected, rounds prices up or down to the nearest nickel.
    - Round to the nearest dime – When selected, rounds prices up or down to the nearest dime.
    - Round to the nearest dollar – When selected, rounds prices up or down to the nearest dollar.
    - Always round up – Regardless of the updated price, it always rounds up when this checkbox is checked. *(This box works with the other rounding selection options with this utility.)*

You can update:

- Individual codes
- All codes per branch
- Codes within a certain department or species that are selected.

Quantity Pricing

Quantity Pricing only applies when one code is selected. If you select multiple codes, the quantity pricing option is disabled.



- Quantity – How many items per unit. The maximum value is $999,999,999.99.

There can be different prices based on the quantity purchased. This is useful for items like:

  - Canned food that is priced by the can and by the case.
  - Pills that are sold by the pill and by the entire bottle.

- Price – The selling price per item. The maximum value is $999,999,999.99.
- Amount – Quantity times the price. The maximum value is $999,999,999.99.

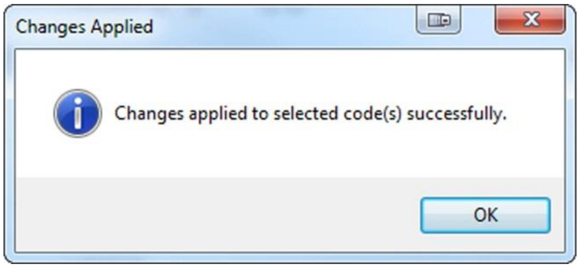
Example: If you are selling 1 Rimadyl chewable for $1.24 the amount is $1.24.

Example: IntraVet also calculates the price if you enter the quantity and the amount. In the example above, a quantity of 60 entered with an amount of $53.40. IntraVet calculated the price (.89 per chewable) by dividing the amount by the quantity.

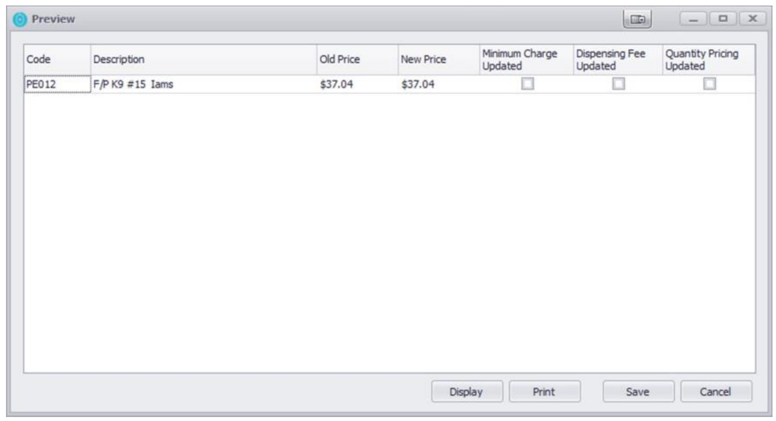
- Discount – total calculated discount. 100% reflects in the discount box by default. Discount is disabled by default.

Action

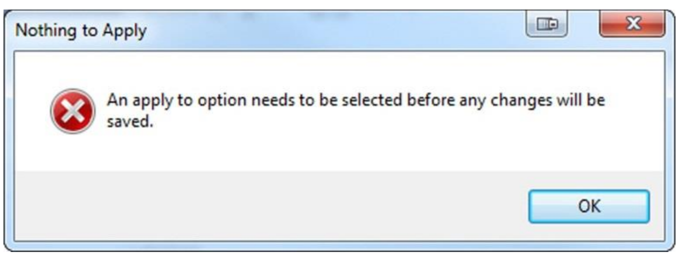
- Apply to All – If selected, it applies the new selection price criteria to all the inventory codes within that branch, species, and department. You must select save to save the changes. This option is disabled when the Quantity Pricing option is selected.
- Apply to Selection – If selected, it applies the new selection price criteria, as well as checkboxes listing if the min. charge, disp. Fee, and/or quantity pricing were changed to all the inventory codes that you have selected or highlighted. You must select save to save the changes.



- Save – You must select either the Apply to All or Apply to Selection option for any data to save or change. After you select this option a new window appears listing all the changes that will be made to the selected codes.



If the Save button is clicked to save changes without selecting Apply To All or Apply To Selection buttons the following message appears:



- Cancel – Cancels the changes and brings you back to the main IntraVet screen.

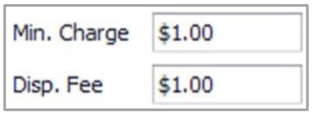
Action

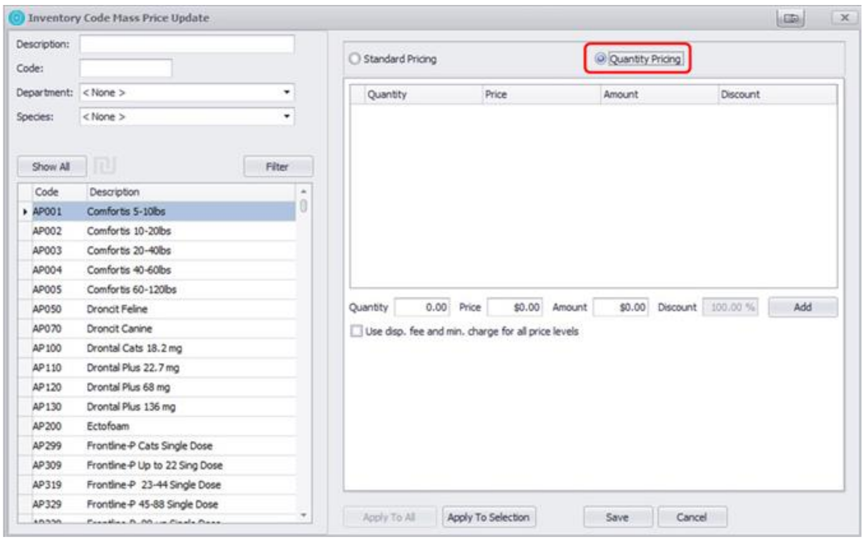
- Display – Shows the changes in display screen. You are able to print from this screen.
- Print – Prints the list.
- Save – Applies the displayed changes to the selected code/codes.
- Cancel – Cancels the changes and brings you back to the utility screen.

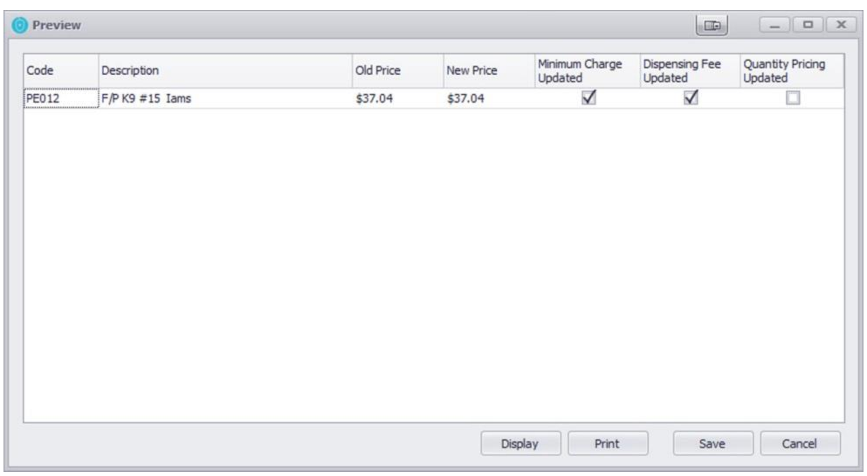
NOTE: The checkboxes for Minimum charge, Dispensing fee, and Quantity pricing updated are only for visual purposes. They cannot be checked or unchecked. If that item is being updated due to the criteria selected then the box will be checked.

<u>Situation 1</u>

If the checkbox Use disp. fee and min. charge for all price levels in Quantity Pricing section is <u>checked</u> and the checkboxes for Minimum Charge Updated and Dispensing Fee Updated in the Preview window are <u>checked</u> as well, the changes entered in Minimum Charge and Dispensing Fee list boxes in the utility will be applied, saved and reflect in Invoice both for Standard Pricing and for all price levels in Quantity Pricing after clicking Apply To All / Apply To Selection and Save.

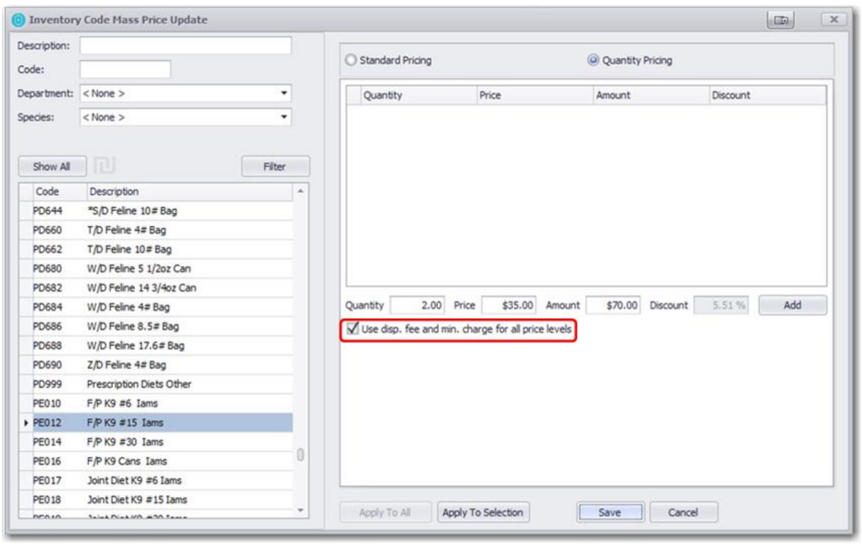


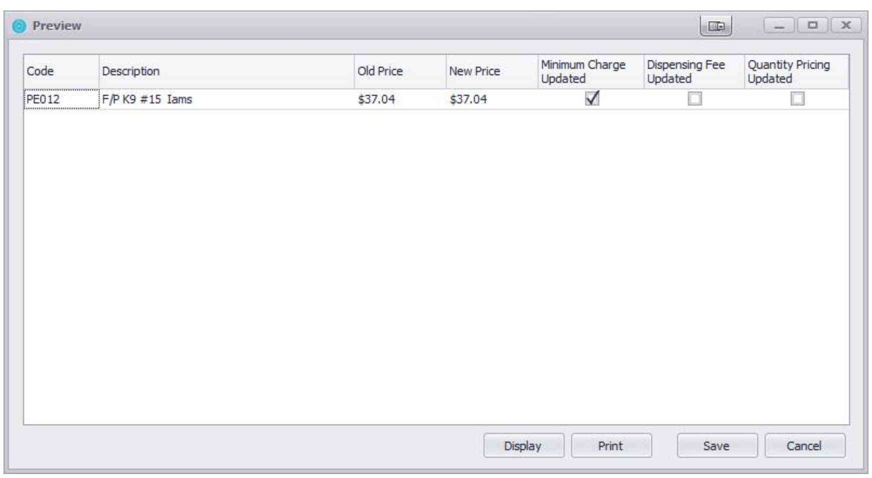




Situation 2

If the checkbox Use disp. fee and min. charge for all price levels in Quantity Pricing section is checked and the checkbox Minimum Charge Updated is checked as well, and checkbox Dispensing Fee Updated is unchecked in Preview window, the changes entered in Minimum Charge list box will be applied, saved and reflect in Invoice both for Standard Pricing and for all price levels in Quantity Pricing. The changes entered in Dispensing Fee list box in the utility will NOT be applied, saved or reflect in Invoice for Standard Pricing or for all price levels in Quantity Pricing after clicking Apply To All / Apply To Selection and Save.

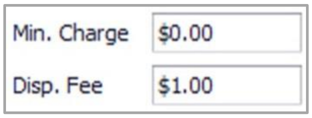


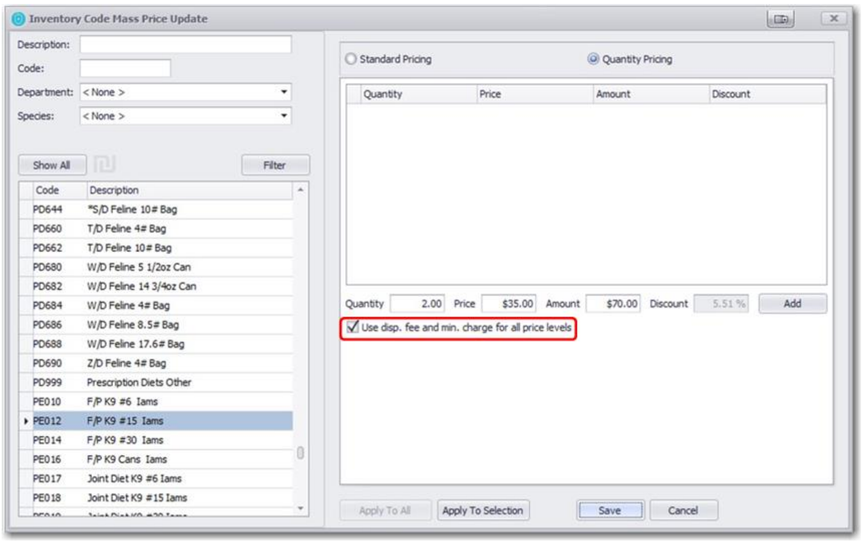


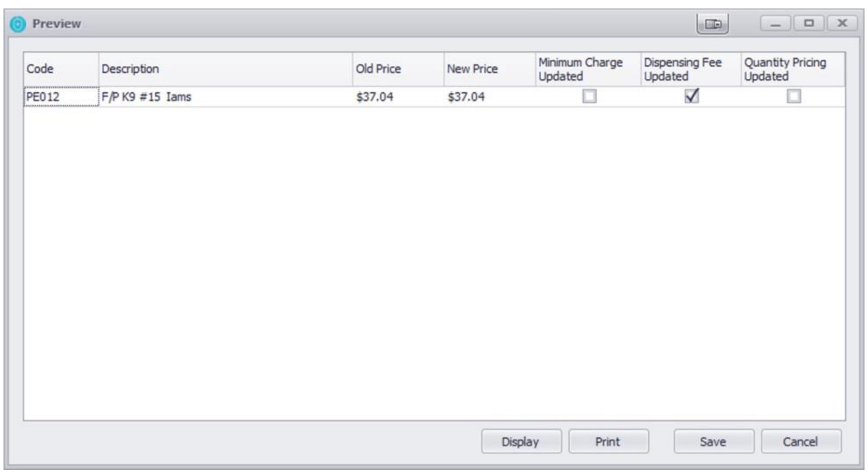
Situation 3

If the checkbox Use disp. fee and min. charge for all price levels in Quantity Pricing section is checked and the checkbox Minimum Charge Updated is unchecked and the checkbox Dispensing Fee Updated is checked in the Preview window, the changes entered in Minimum Charge list box will NOT be applied, saved and reflect in Invoice for Standard Pricing or for all price levels in Quantity Pricing. The changes entered in Dispensing Fee list box in the utility will be applied,

saved and reflect in Invoice both for Standard Pricing and for all price levels in Quantity Pricing after clicking Apply To All / Apply To Selection and Save.

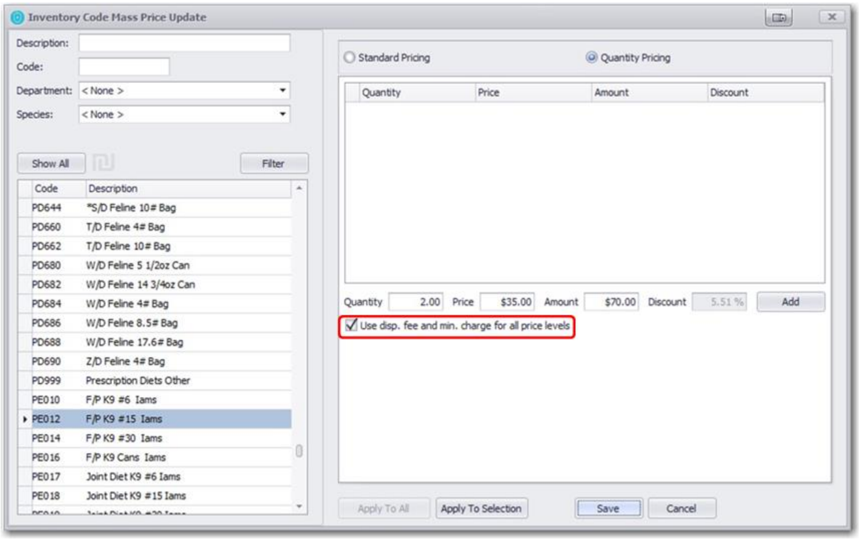


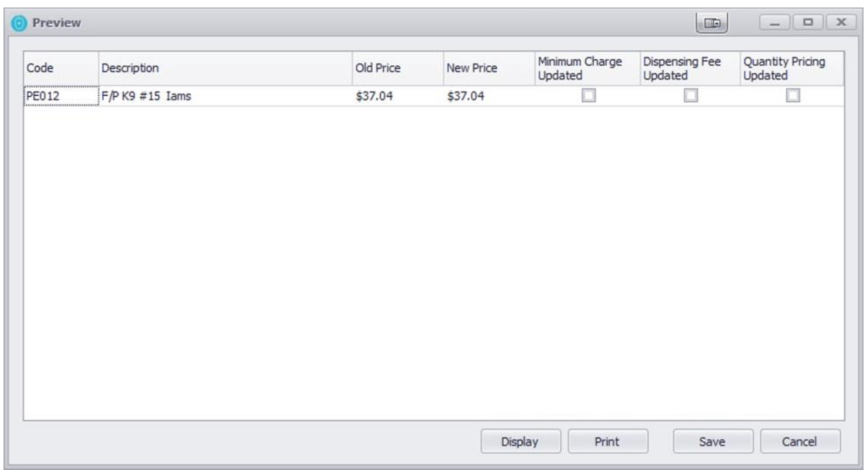




Situation 4

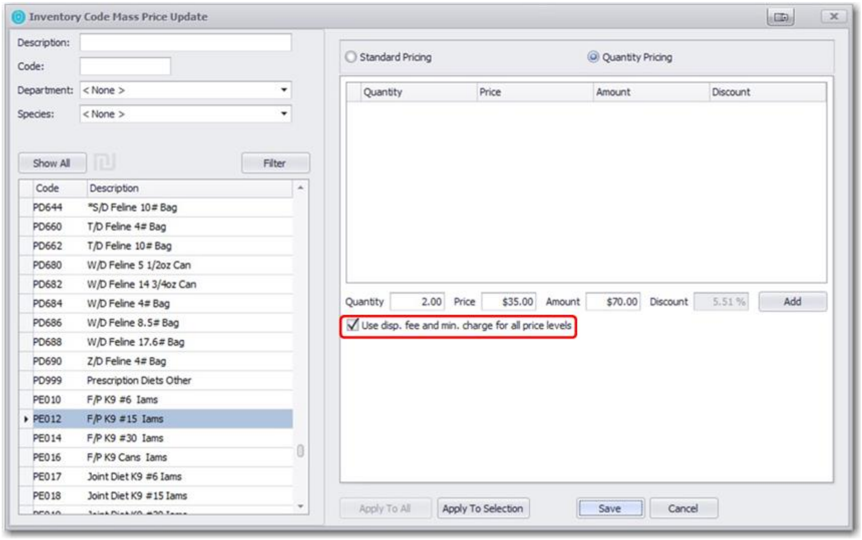
If the checkbox Use disp. fee and min. charge for all price levels in Quantity Pricing section is checked and the checkboxes Minimum Charge Updated and Dispensing Fee Updated in the Preview window are unchecked, the changes entered in Minimum Charge and Dispensing Fee list boxes in the utility will NOT be applied, saved or reflect in Invoice for Standard Pricing or for all price levels in Quantity Pricing after clicking Apply To All / Apply To Selection and Save.

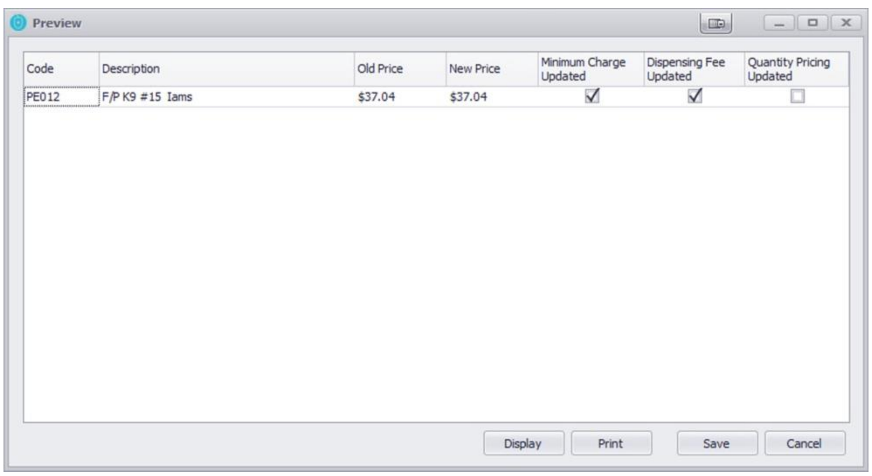




Situation 5

If the checkbox Use disp. fee and min. charge for all price levels in Quantity Pricing section is <u>unchecked</u> and the checkboxes Minimum Charge Updated and Dispensing Fee Updated in the Preview window are <u>checked</u>, the changes entered in Minimum Charge and Dispensing Fee list boxes in the utility will be applied, saved and reflect in Invoice for only one Standard Pricing. The changes will NOT be applied, saved or reflect in Invoice for all price lines listed in Quantity Pricing after clicking Apply To All / Apply To Selection and Save.





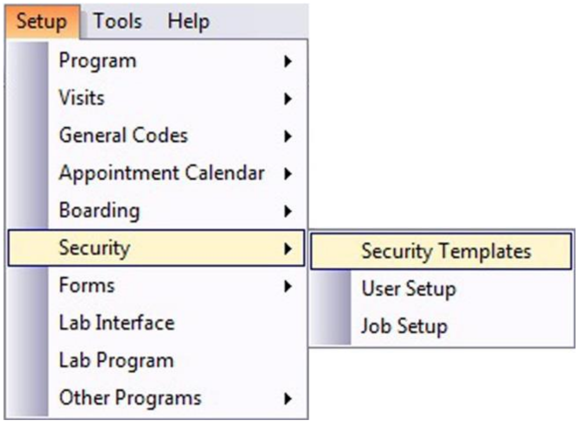
NOTE 1: In all Situations. The Selling Price for the item reflects/doesn't reflect in print form of the Invoice if checkboxes Price for items with Minimum charge and Price for items with Quantity Pricing or Dispensing Fee are checked/unchecked in Setup | Program | General Branch Setup. Select Branch | Edit | Invoice tab.

NOTE 2: In all Situations. The order of application of Minimum Charge and Dispensing Fee depends on if the checkbox Add Dispensing Fee first and compare to Min. charge [or take Min. charge and add Disp. fee] is checked/unchecked in Setup | Program | General Branch Setup. Select Branch | Edit | Invoice tab.

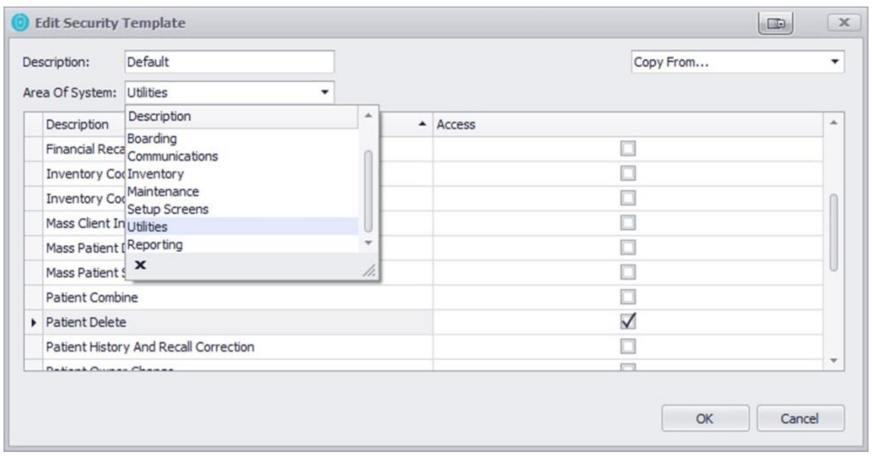
Security

You must have security options/permission to access and run the utility.

The Inventory Code Mass Price Update option must be checked under Setup | Security | Security Templates.



Select the template to which you need access. Go to Area of System | Utilities, and check the Inventory Code Mass Price Update box. Click OK to save.



<u>Multi-User</u>

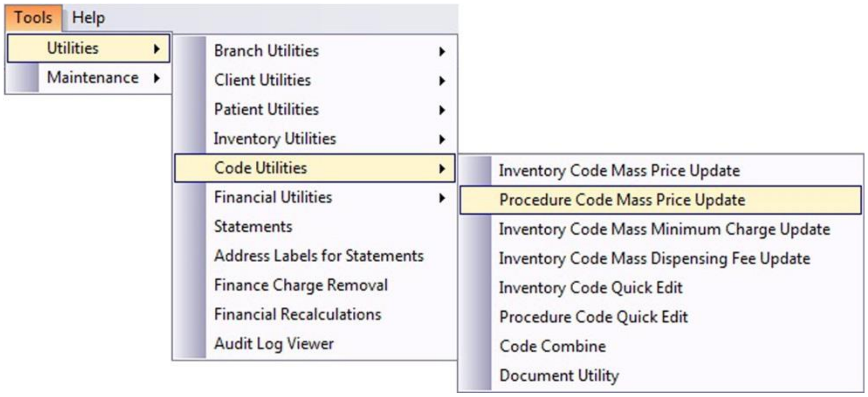
Running the utility requires exclusive use.

Procedure Code Mass Price Update

You can update your procedure codes by amount or percentage. You can select by department, perform a global update, or browse through the codes and update the selling price and cost individually.

You may also select to apply changes to only non-zero prices and select a rounding option (nickel, dime, or dollar).

From the IntraVet Menu Bar, select Tools | Utilities | Code Utilities | Procedure Code Mass Price Update.



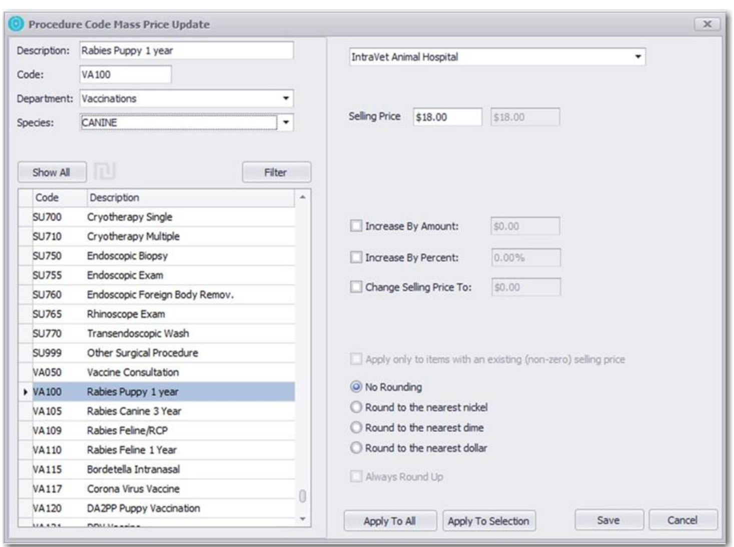
When you enter the utility, one code is selected. Selling Price, Increase By Amount and Increase By Percent checkboxes are enabled and Change Selling Price To checkbox is disabled. The Increase By Amount will be disabled until you highlight multiple codes. When multiple codes are selected, the Selling Price field is disabled since it is only relevant when an individual code is selected. Increase By Amount, Increase By Percent and Change Selling Price To checkboxes are enabled.

To select multiple codes:

- Hold down the Ctrl key to highlight and select multiple (non-consecutive) codes.
- Hold down the Shift key to highlight and select multiple (consecutive) codes.

Price updates done in this utility update estimate templates to the new selling price.

The settings for the Procedure codes are originally set up under Setup | General Codes | Procedure.



In the utility you have the options of:

- Description – Explanation of item.
- Code – Alpha/numeric numbering that identifies the Description.
- Department – Section of your practice.
- Species – Type or variety of animal.

Action

- Show All – Shows all the Inventory codes set up within IntraVet. If there is a filter set and you click Show All, it ignores the filter and shows all the inventory codes.
    - Filter – Filters the Inventory codes to only show those that meet the requirements added for Description, Code, Department, and Species.

Location

- Branch – Change branches to update codes.

Updates

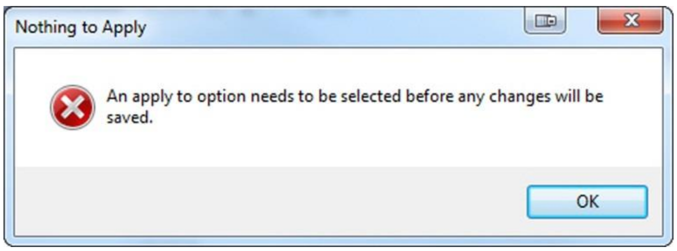
- Selling Price – The price that is normally charged clients for this item. It has two list boxes:
    - The first box (next to selling price) is enabled. List the new selling price for the selected code/codes.
    - The second box is disabled. It shows the selected code's current selling price.

    Price updates done in this utility update estimate templates to the new selling price. If the new pricing is to be reflected automatically in your estimate templates, you MUST use this utility (specifically "Increase By Amount" or "Increase By Percent") when you update pricing.
- Increase by Amount – Increases the selected code/codes by the amount entered into this box.
    - Increase by Percent – Increases the selected code/codes by the percent entered into this box.
    - Change Selling Price To – Changes the selected code/codes to the amount entered in this box.
    - Apply only to items with an existing (non-zero) selling price – Allows you to only update codes that currently have a selling price within the code setup. Leaving this unchecked updates all codes regardless of their current selling price.
    - Disabled if only one code is selected.
    - Enabled if multiple codes are selected.
    - No Rounding – When selected, the prices are not rounded up or down. This should be selected by default.
    - Round to the nearest nickel – When selected, rounds prices up or down to the nearest nickel.
    - Round to the nearest dime – When selected, rounds prices up or down to the nearest dime.
    - Round to the nearest dollar – When selected, rounds prices up or down to the nearest dollar.

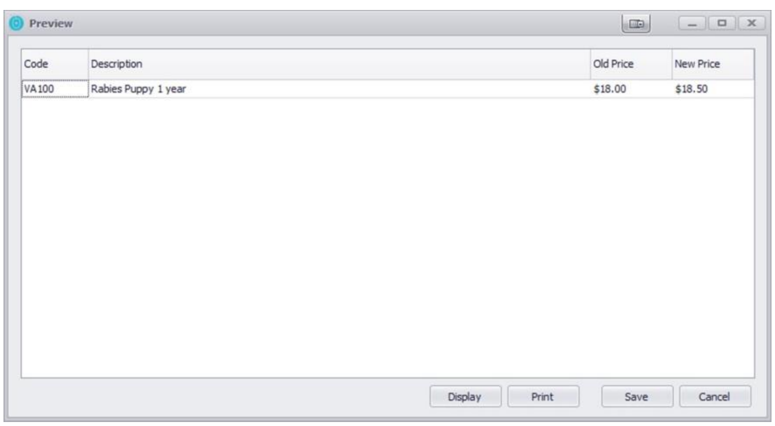
- Always round up – Regardless of the updated price, it always rounds up when this checkbox is checked. *(This box works with the other rounding selection options with this utility.)*

Action

- Apply to All – If selected, it applies the new selection price criteria to all the procedure codes within that branch, species, and department. You must select save to save the changes.
- Apply to Selection – If selected, it applies the new selection price criteria. You must select save to save the changes.
- If the Save button is clicked to save changes without selecting Apply To All or Apply To Selection buttons the following message appears:



- Save – After you click Save a new window will appear listing all the changes that will be made to the selected codes.



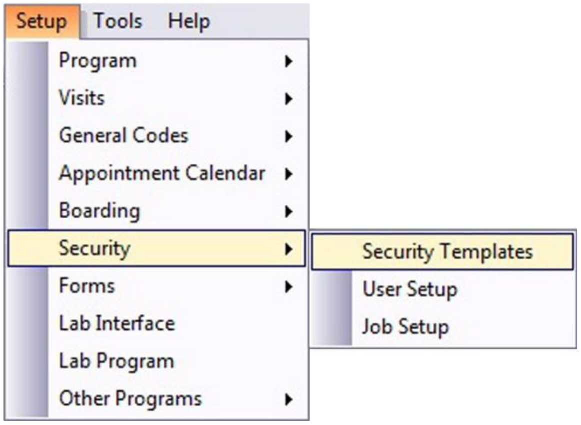
- Cancel – Cancels the changes and brings you back to the main IntraVet screen.

Action

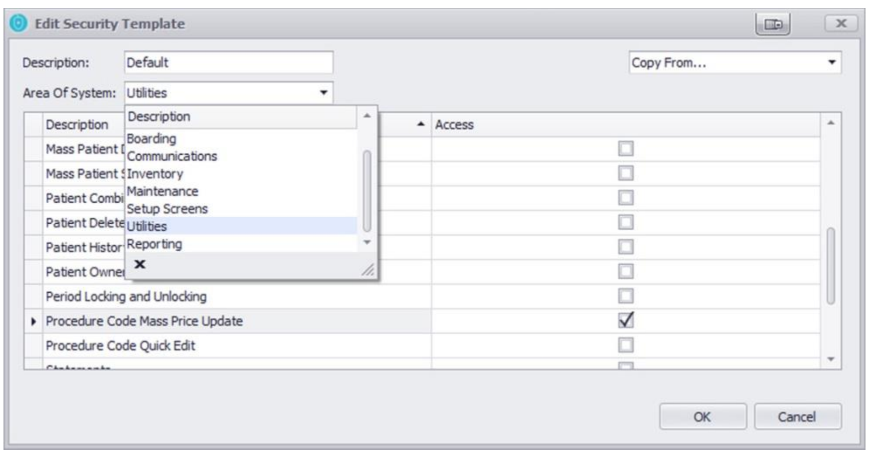
- Display – Shows the changes in display screen. You can print from this screen.
- Print – Prints the list.
- Save – Applies the displayed changes to the selected code/codes.
- Cancel – Cancels the changes and brings you back to the utility screen.

<u>Security</u>

The Procedure Code Mass Price Update option must be checked under Setup | Security | Security Templates.



Select the template to which you need access. Go to Area of System | Utilities, and check the Procedure Code Mass Price Update box. Click OK to save.



You must have security options/permission to access and run the utility.

<u>Multi-User</u>

Running the utility requires exclusive use.

Inventory Code Mass Minimum Charge Update

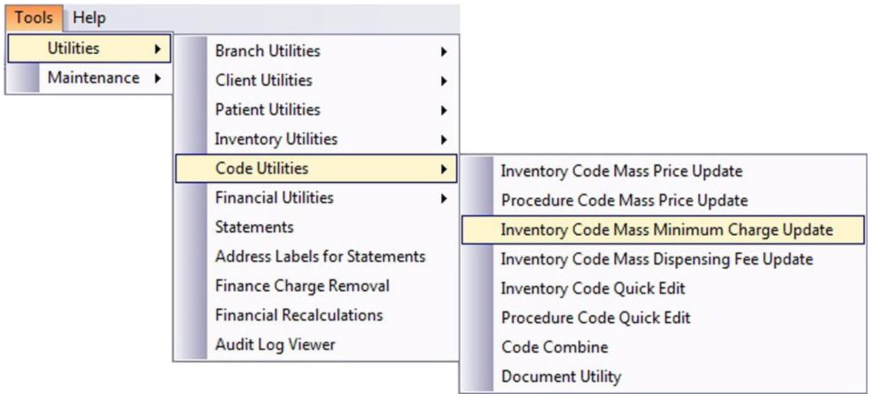
This utility works like the other price update utilities: You can update your inventory prices by amount or percentage. You can select by department, perform a global update, or browse through the codes and update an individual selling price and cost.

You may also select to apply changes to only non-zero prices and select a rounding option (nickel, dime, or dollar).

You can select to apply changes to codes with a minimum charge and select a rounding option (nickel, dime, or dollar).

If you want to have the new pricing reflected automatically in your estimate templates, you must use Update By Amount or Update By Percentage.

From the IntraVet Menu Bar, select Tools | Utilities | Code Utilities | Inventory Code Mass Minimum Charge Update.



- Description – Explanation of item.
- Code – Alpha/numeric numbering that identifies the Description.
- Department – Section of your practice.
- Species – Type or variety of animal.

Action

- Show All – Shows all the Inventory codes set up within IntraVet. If there is a filter set and you click Show All, it ignores the filter and shows all the inventory codes.
    - Filter – Filters the Inventory codes to only show those that meet the requirements added for Description, Code, Department, and Species.

Location

- Branch – Allows you to change branches to update codes.

Updates

- Item Cost – Displays the actual Cost of the item. It is always disabled.
- Selling Price – The price that is normally charged clients for this item. The maximum value is $999,999,999.99. It has two list boxes:
- The first box (next to selling price) is enabled. List the new selling price for the selected code/codes.
- The second box is disabled. It shows the selected code's current selling price.
- Markup % – Markup percentage is limited by the maximum value of the new selling price.
    - The new selling price cannot exceed a maximum value of $999,999,999.99.
    - Percentage markup for an inventory item. Should be 9,999.99%.
- Min Charge – The lowest amount to be charged for an item. When the quantity, multiplied by the price, equal to or over the minimum charge, only the price per unit is charged. The maximum value is $999,999,999.99.

  - Disp. Fee – When creating an invoice with a dispensing fee, the amount listed for the line item is the quantity multiplied by the price, plus the dispensing fee. The maximum value is $999,999,999.99.

The following fields are enabled if multiple codes are selected:

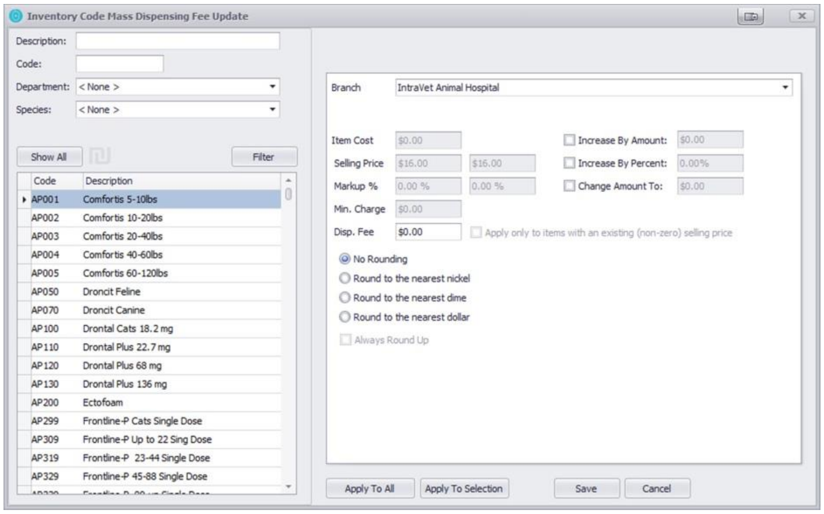
- Increase by Amount – Increases the selected codes by the amount entered into this list box. The maximum value is $999,999,999.99.
- Increase by Percent – Increases the selected code/codes by the percent entered into this box. Maximum value should be 9,999.99%
- Change Amount To – Changes the selected code/codes to the amount entered in this box. The maximum value is $999,999,999.99.

The following fields may be selected:

- Apply only to items with an existing (non-zero) selling price – Allows you to only update codes that currently have a selling price within the code setup. Leaving this unchecked updates all codes regardless of their current selling price.
  - Disabled if only one code is selected.
  - Enabled if multiple codes are selected.
- No Rounding – Does not round prices. This should be selected by default.
- Round to the nearest nickel – When selected, rounds prices up or down to the nearest nickel.
- Round to the nearest dime – When selected, rounds prices up or down to the nearest dime.
- Round to the nearest dollar – When selected, rounds prices up or down to the nearest dollar.
- Always round up – Regardless of the updated price, it always rounds up when this checkbox is checked. *(This box works with the other rounding selection options with this utility.)*

You can update:

- Individual codes.
- All codes per branch.
- Codes within a certain department or species that are selected.



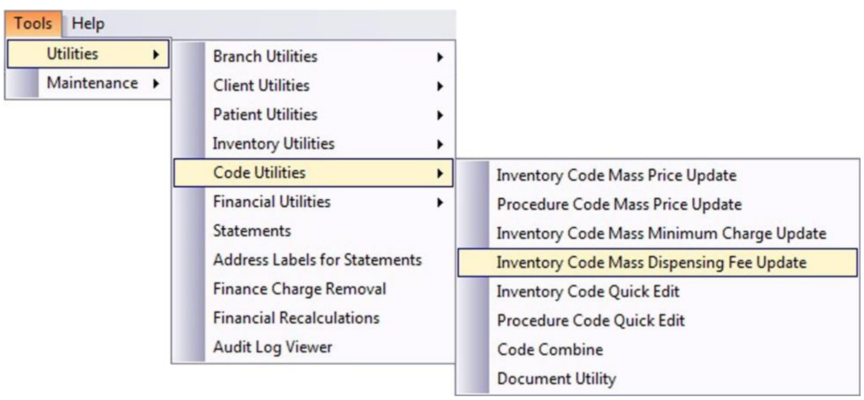
Inventory Code Mass Dispensing Fee Update

This utility works like the other price update utilities: You can change codes individually, by department, or all inventory codes.

You can change prices to a specific amount, by amount or percent.

You may also apply changes to codes with a dispensing fee and select a rounding option (nickel, dime, or dollar).

From the IntraVet Menu Bar, select Tools | Utilities | Utilities | Inventory Mass Dispensing Fee Update.



- Description – Explanation of item.
- Code – Alpha/numeric numbering that identifies the Description.
- Department – Section of your practice.
- Species – Type or variety of animal.

Action

- Show All – Shows all the Inventory codes set up within IntraVet. If there is a filter set and you click Show All, it ignores the filter and shows all the inventory codes.
- Filter – Filters the Inventory codes to only show those that meet the requirements added for Description, Code, Department, and Species.

Location

- Branch – Allows you to change branches to update codes.

Updates

- Item Cost – Displays the actual Cost of the item. It is always disabled.
- Selling Price – The price that is normally charged clients for this item. The maximum value is $999,999,999.99. It has two list boxes:
  - The first box (next to selling price) is enabled. List the new selling price for the selected code/codes.
  - The second box is disabled. It shows the selected code's current selling price.
- Markup % – Markup percentage is limited by the maximum value of the new selling price.
  - The new selling price cannot exceed a maximum value of $999,999,999.99.
  - Percentage markup for an inventory item. Should be 9,999.99%.
- Min Charge – The lowest amount to be charged for an item. When the quantity, multiplied by the price, equal to or over the minimum charge, only the price per unit is charged. The maximum value is $999,999,999.99.
- Disp. Fee – When creating an invoice with a dispensing fee, the amount listed for the line item is the quantity multiplied by the price, plus the dispensing fee. The maximum value is $999,999,999.99.

The following fields are enabled if multiple codes are selected:

- Increase by Amount – Increases the selected codes by the amount entered into this list box. The maximum value is $999,999,999.99.
  - Increase by Percent – Increases the selected code/codes by the percent entered into this box. Maximum value should be 9,999.99%
  - Change Amount To – Changes the selected code/codes to the amount entered in this box. The maximum value is $999,999,999.99.

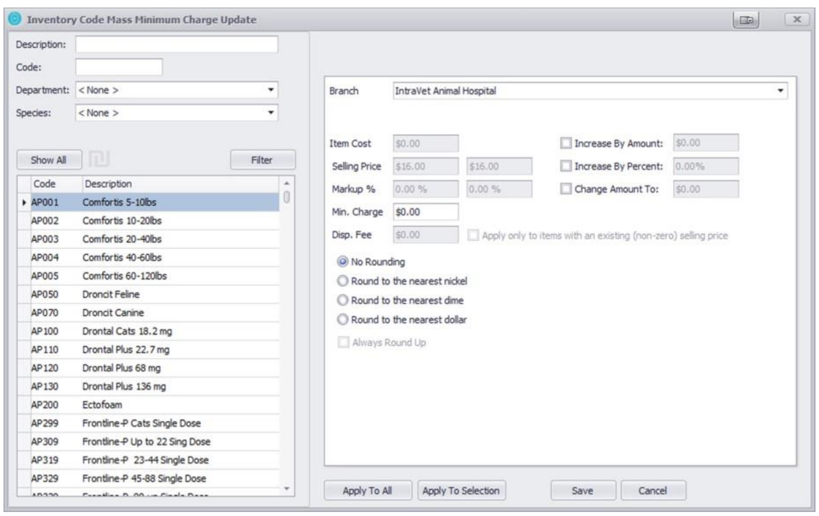
The following fields may be selected:

- Apply only to items with an existing (non-zero) selling price – Allows you to only update codes that currently have a selling price within the code setup. Leaving this unchecked updates all codes regardless of their current selling price.
  - Disabled if only one code is selected.
  - Enabled if multiple codes are selected.
- No Rounding – Does not round prices. This should be selected by default.
- Round to the nearest nickel – When selected, rounds prices up or down to the nearest nickel.

- Round to the nearest dime – When selected, rounds prices up or down to the nearest dime.
- Round to the nearest dollar – When selected, rounds prices up or down to the nearest dollar.
- Always round up – Regardless of the updated price, it always rounds up when this checkbox is checked. *(This box works with the other rounding selection options with this utility.)*

You can update:

- Individual codes.
- All codes per branch.
- Codes within a certain department or species that are selected.

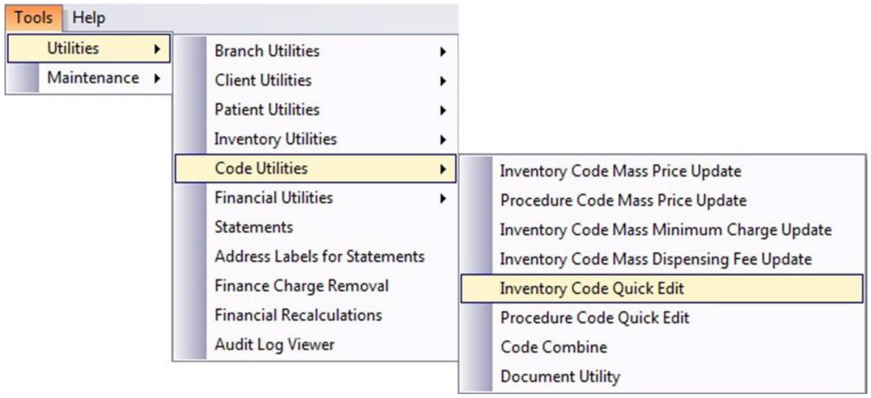


Inventory Code Quick Edit

Inventory Code Quick Edit allows you to quickly change inventory code setup globally, departmentally, or individually. You can select default settings for more than one field to create a profile and apply the profile to all inventory codes, to specific departments or to individually selected codes.

The settings for the inventory codes are originally set up for the code under Setup | General Codes | Inventory. Select a code and click Edit, and then click the Invoicing tab.

From the IntraVet Menu Bar, select Tools | Utilities | Code Utilities | Inventory Code Quick Edit.



When you enter the utility, one code will be selected and the current settings are reflected in the right pane for that code. You can select default settings for more than one field to create a profile and apply the profile to the selected procedure codes.

To select multiple codes:

- Hold down the Ctrl key to highlight and select multiple (non-consecutive) codes.
- Hold down the Shift key to highlight and select multiple (consecutive) codes.

You can use the utility when you have multiple Inventory codes that need to be edited. Codes that were not set up properly initially can be corrected in the utility. Run the Inventory Code Quick Edit utility, which sets the codes to the preferred settings.

The list of codes can be filtered by:

- Description – Explanation of item.
- Code – Alpha/numeric numbering that identifies the Description.
- Department – Section of your practice.
- Species – Type or variety of animal.

Action

- Show All – Shows all the Inventory codes set up within IntraVet. If there is a filter set and you click Show All, it ignores the filter and shows all the inventory codes.
- Filter – Filters the Inventory codes to only show those that meet the requirements added for Description, Code, Department, and Species.

When you have a single code highlighted in the left pane, its current setup is reflected on the right pane. If there is more than one item highlighted, the right pane has everything unchecked at the top, with no tax, and no discount. In order to change the values, you must select the flag so it changes to green . If the flag remains red , the codes selected do not update.

The following fields are available:

Overwrites

- Overwrite date – If this field is checked it allows the operator to enter a date on the invoice line.

Example: If you have a patient that has been treated over a period of several days, Line items entered on a date other than the current date, save in the patient history with the line item date. However, the accounting date for the entire invoice is the date on which it is saved permanently.

- Overwrite Description – If this field is checked it allows you to change the wording of the description on the invoice and in the patient history for this procedure code.
- Overwrite Quantity – If this field is checked it allows you to change the quantity, or default it to 1 and skip the entry.
- Overwrite Price – If this field is checked it allows the price to be changed for this procedure at the time of invoicing. If left unchecked, the price cannot be changed and remains the price set in procedure code setup.
- Overwrite Amount – If this field is checked it allows you to change the total amount for the invoice line. If left unchecked for a code, the amount will always be the total of the quantity times the price.

Taxable

The taxable options change depending on what is set up for the practice. If the practice has the secondary tax option selected in general branch setup then the following options will be added to the code edit tax options

- No Tax – If checked, tax will not apply to this code.
- Primary – If checked, it will charge for the primary tax option setup in General Branch Setup.
- Secondary – If checked, it will charge for the secondary tax option that is set up in General Branch Setup.
- Add Both – If checked, it will charge for both Primary and Secondary tax for the code.
- Compound Both – If checked, it will compound the Primary and Secondary sales tax for the code.
- Confirm – There will be a pop-up message asking you to confirm whether or not tax should be charged.

Pricing

- Keep Markup % [or Keep Price] – When an item is received into inventory with a price change, IntraVet asks if you want to change the selling price. If this option is checked, and Yes is selected, the selling price is marked up by the last percentage used for this item.

Basic

- Controlled Drug – If this field is checked, the item is marked as a controlled substance. When you dispense a controlled substance, it appears on the controlled substance report.

- Species – Species can be defined for an inventory code. Codes with a defined species generate a warning when invoiced for a different species. If a species is selected, that inventory code is set.

Purchasing

- Optimal Quantity – Enter the quantity on-hand for this item that is an acceptable level. When the quantity on-hand falls below the number entered in this field, it appears on the Inventory Reorder Report.
- Reorder Level – This field indicates the quantity of an item that needs to be ordered. This is for information purposes only and does not otherwise affect the system.

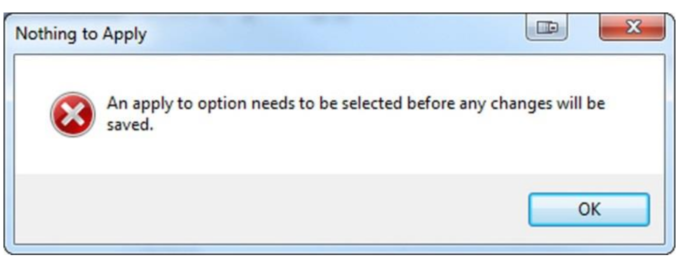
Discount

- No – If No, the selected codes will not be marked as discountable.
- Yes – If Yes, the selected codes will be marked as discountable.
- Confirm – There will be a pop-up message asking you to confirm whether or not tax should be charged.

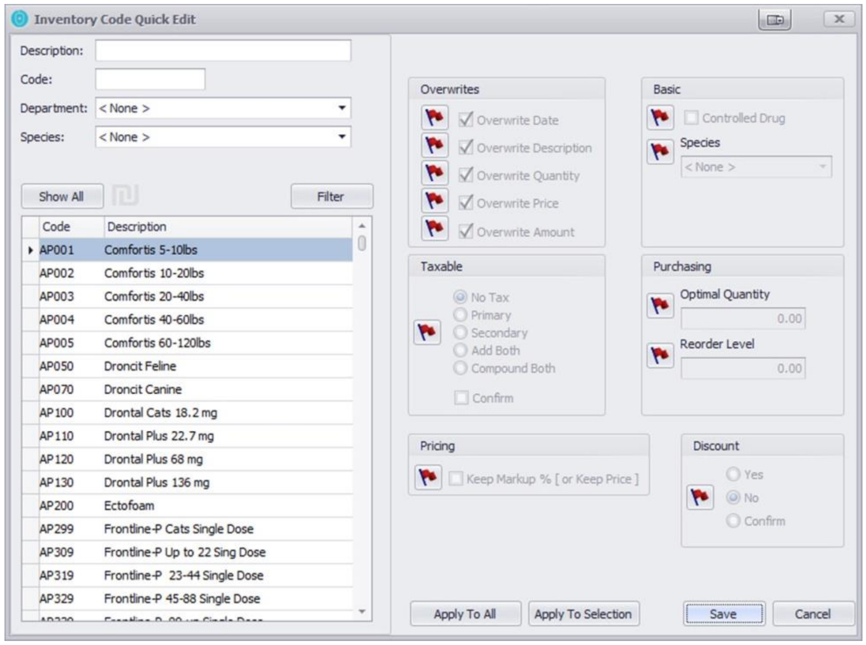
Action

- Apply To All – If this button is clicked, it applies to all codes. It does not Apply To All until after Save is clicked. When this option has been selected it highlights in blue. Only 1 apply option can be selected. If Apply To All is selected, you cannot choose Apply To Selection.
- Apply To Selection – If this button is clicked, it applies to the selected codes. When this option has been selected it highlights in blue. Only 1 apply option can be selected. If Apply To Selection is selected, you cannot choose Apply To All.
- Save – Save will take the apply option selected and save the selected changes to the selected code/s. If there is not an apply option selected before you click save, it will only make the changes to the selected code/s.

If the Save button is clicked to save changes without selecting Apply To All or Apply To Selection buttons the following message appears:



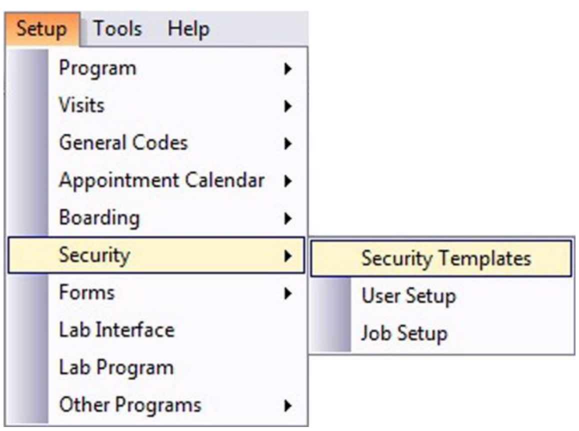
- Cancel – Cancels all changes and takes you back to the main IntraVet screen.



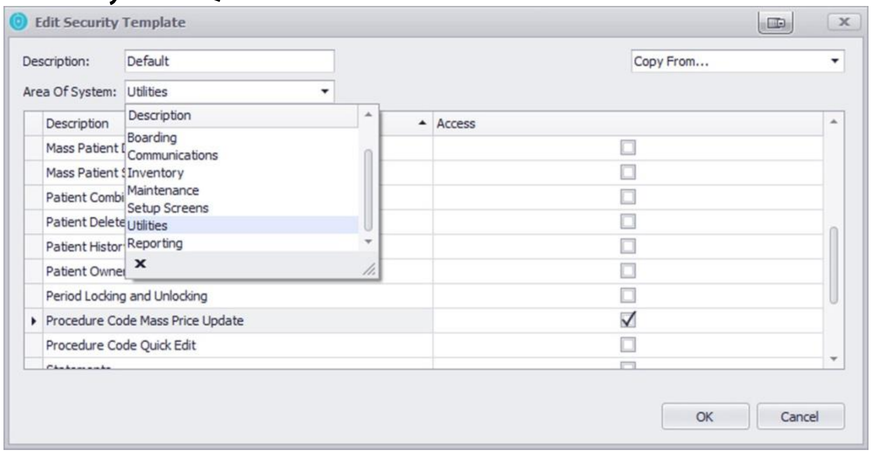
Security

You must have security options / permission to access and run the utility.

The Inventory Code Quick Edit option must be checked under Setup | Security | Security Templates.



Select the template to which you need access. Go to Area of System | Utilities, and check the Inventory Code Quick Edit box. Click OK to save.



<u>Multi-User</u>

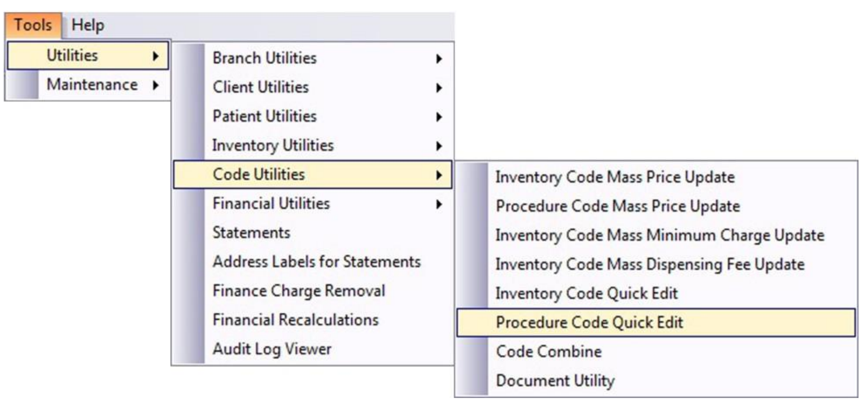
Running the utility requires exclusive use.

Procedure Code Quick Edit

Procedure Code Quick Edit allows you to change certain procedure code settings globally, departmentally, or individually. You can select default settings for more than one field to create a profile and apply the profile to all inventory codes, to specific departments or to individually selected codes.

The settings for the procedure codes are originally set up for the code under Setup | General Codes | Procedure. Select a code and click Edit, and then click the Invoicing tab.

From the IntraVet Menu Bar, select Tools | Utilities | Code Utilities | Procedure Code Quick Edit.



When you enter the utility, one code will be selected and the current settings are reflected in the right pane for that code. You can select default settings for more than one field to create a profile and apply the profile to the selected procedure codes.

To select multiple codes:

- Hold down the Ctrl key to highlight and select multiple (non-consecutive) codes.
- Hold down the Shift key to highlight and select multiple (consecutive) codes.

You can use the utility when you have multiple Procedure codes that need to be edited. Codes that were not set up properly initially can be corrected in the utility. Run the Procedure Code Quick Edit utility, which sets the codes to the preferred settings.

The list of codes can be filtered by:

- Description – Explanation of item.
- Code – Alpha/numeric numbering that identifies the Description.
- Department – Section of your practice.
- Species – Type or variety of animal.

Action

- Show All – Shows all the Procedure codes set up within IntraVet. If there is a filter set and you click Show All, it ignores the filter and shows all the procedure codes.
- Filter – Filters the Procedure codes to only show those that meet the requirements added for Description, Code, Department, and Species.

When you have a single code highlighted in the left pane, its current setup is reflected on the right pane. If there is more than one item highlighted, the right pane has everything unchecked at the top, with no tax, and no discount. To change the values, you must select the red flag so it changes to green. If the flag remains red, the codes selected do not update.

The following fields are available:

Overwrite

- Overwrite Date – If this field is checked it allows the operator to enter a date on the invoice line.

  Example: If you have a patient that has been treated over a period of several days, Line items entered on a date other than the current date, save in the patient history with the line item date. However, the accounting date for the entire invoice is the date on which it is saved permanently.

- Overwrite Description – If this field is checked it allows you to change the wording of the description on the invoice and in the patient history for this procedure code.
- Overwrite Quantity – If this field is checked it allows you to change the quantity, or default it to 1 and skip the entry.
- Overwrite Price – If this field is checked it allows the price to be changed for this procedure at the time of invoicing. If left unchecked, the price cannot be changed and remains the price set in procedure code setup.
- Overwrite Amount – If this field is checked it allows you to change the total amount for the invoice line. If left unchecked for a code, the amount will always be the total of the quantity times the price.

Taxable

The taxable options change depending on what is set up for the practice. If the practice has the secondary tax option selected in general branch setup then the following options will be added to the code edit tax options.

- No Tax – If checked, tax will not apply to this code.
- Primary – If checked, it will charge for the primary tax option setup in General Branch Setup.
- Secondary – If checked, it will charge for the secondary tax option that is set up in General Branch Setup.
- Add Both – If checked, it will charge for both Primary and Secondary tax for the code.
- Compound Both – If checked, it will compound the Primary and Secondary sales tax for the code.
- Confirm – There will be a pop-up message asking you to confirm whether or not tax should be charged.

Basic

- Species – Codes with a defined species generate a warning when invoicing for a different species.

If you select species, it will be set to that Procedure code setup.

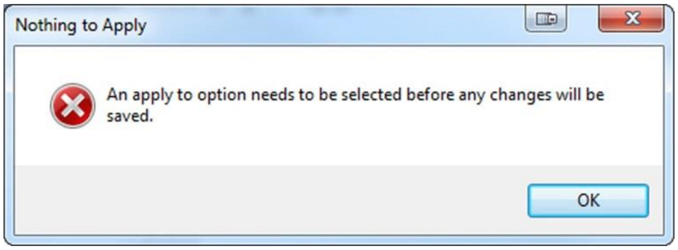
Discount

- No – If checked, (or left blank and Yes is NOT checked) the selected codes will not be marked discountable.
- Yes – If checked, the selected codes will be marked as discountable.
- Confirm – There will be a pop-up message asking you to confirm whether or not tax should be charged.

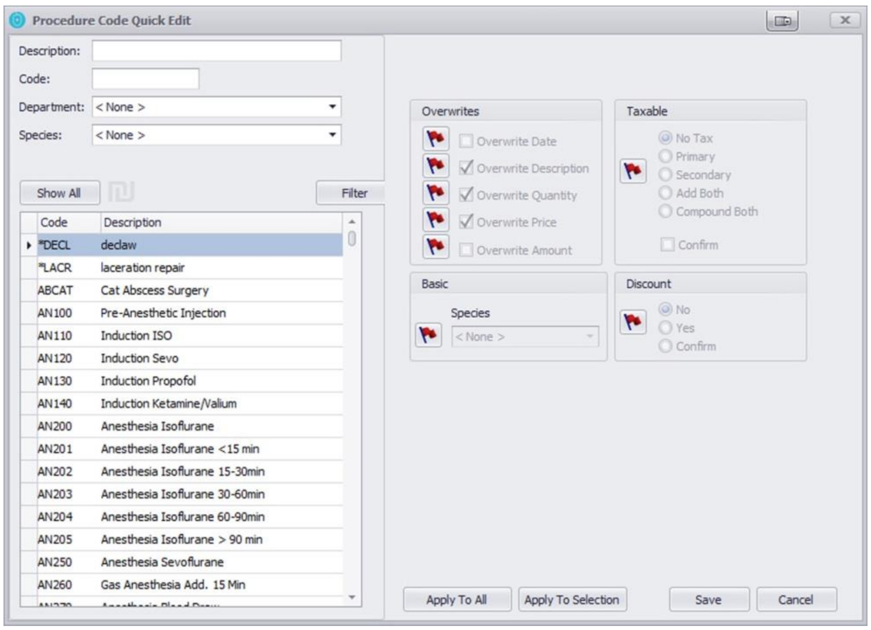
Action

- Apply To All – If this button is clicked, it applies to all codes. It does not Apply To All until after Save is clicked. When this option has been selected it highlights in blue. Only 1 apply option can be selected. If Apply To All is selected, you cannot choose Apply To Selection.
- Apply To Selection – If this button is clicked, it applies to the selected codes. When this option has been selected it highlights in blue. Only 1 apply option can be selected. If Apply To Selection is selected, you cannot choose Apply To All.
- Save – Save will take the apply option selected and save the selected changes to the selected code/s. If there is not an apply option selected before you click save, it will only make the changes to the selected code/s.

If the Save button is clicked to save changes without selecting Apply To All or Apply To Selection buttons the following message appears:



- Cancel – Cancels all changes and takes you back to the main IntraVet screen.



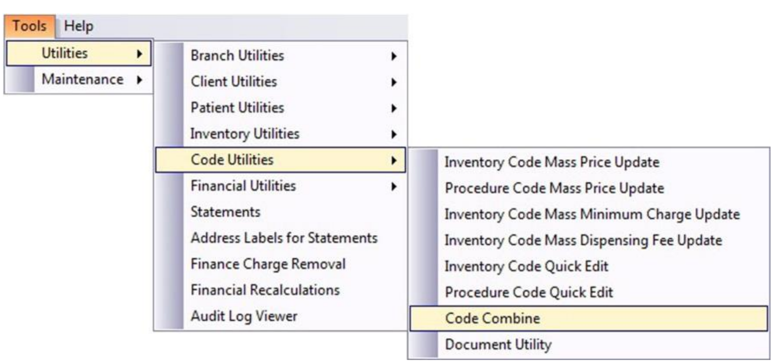
Multi-User

Running the utility requires exclusive use.

Code Combine

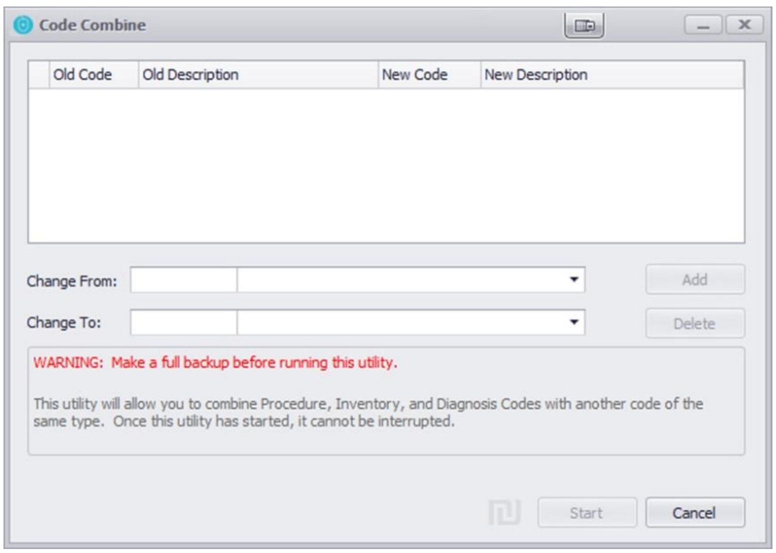
The Code Combine utility allows you to combine like codes for Diagnosis, Inventory and Procedure codes.

- From the IntraVet Menu Bar, select Tools | Utilities | Code Utilities | Code Combine.



- In the blank, Change From entry line, enter the code number that is to be changed, or click inside the entry line and scroll to the code, or simply double-click in the entry line and scroll to the desired code. Press Enter to move your selection into the entry line.
- Repeat the step above for the Change To blank entry line.
- Click Add to move the two codes into the grid.
- If you made a mistake, highlight the line in the grid and click Delete; then, repeat the steps above.
- Click Start.
- *NOTE: Make a full backup before running this utility.*

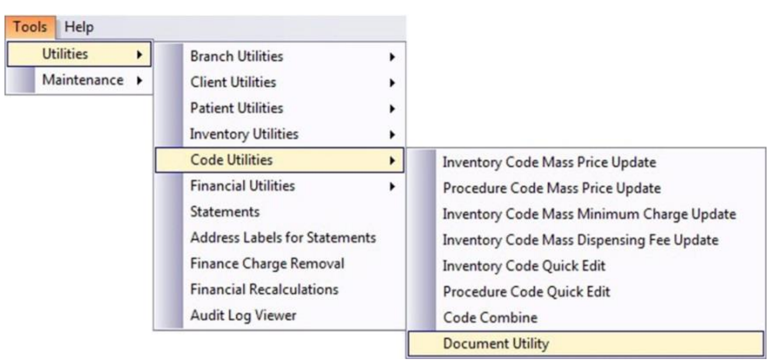
This utility cannot be interrupted or stopped once the Start button is clicked. The program makes the changes and automatically closes the window.



Document Utility

The Document Utility allows you to install the LifeLearn documents into your documents Code list. You can also convert any Endnotes/Footnotes to the document body text. The latter requires Microsoft Word® to be installed. Remember to make a full backup before running this utility.

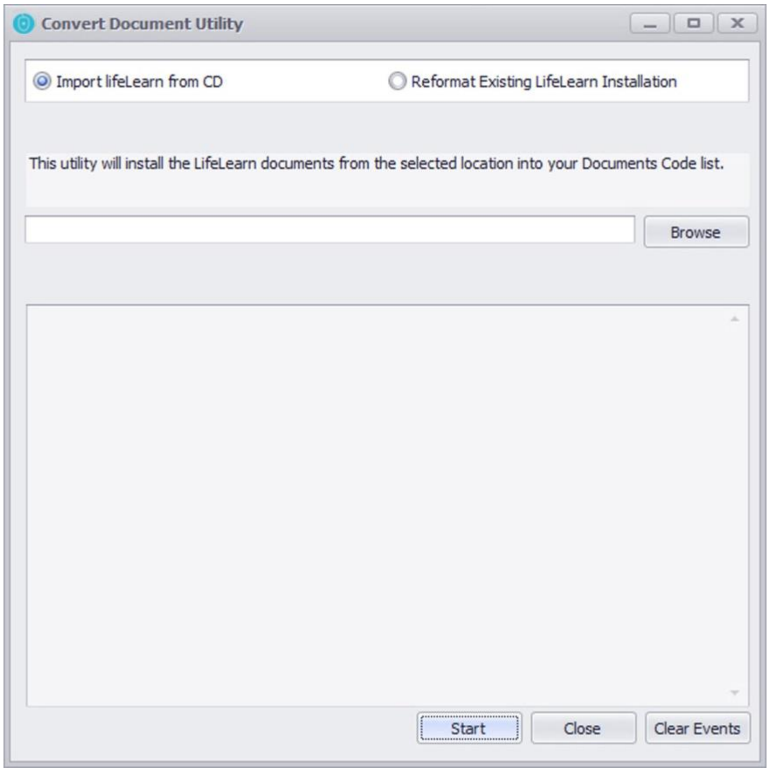
- From the IntraVet Menu Bar, select Tools | Utilities | Code Utilities | Document Utility.



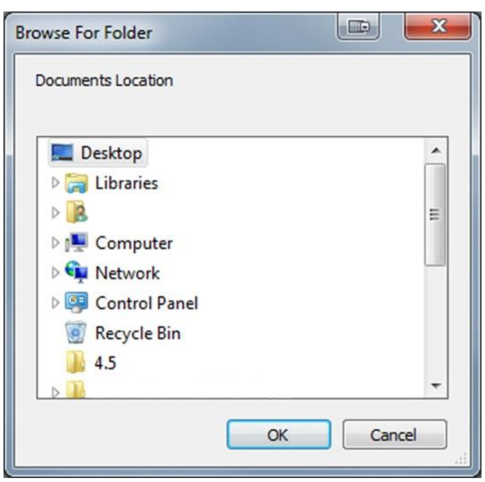
Import LifeLearn from CD

- Select the Import LifeLearn from CD radio button.

- Click Browse.



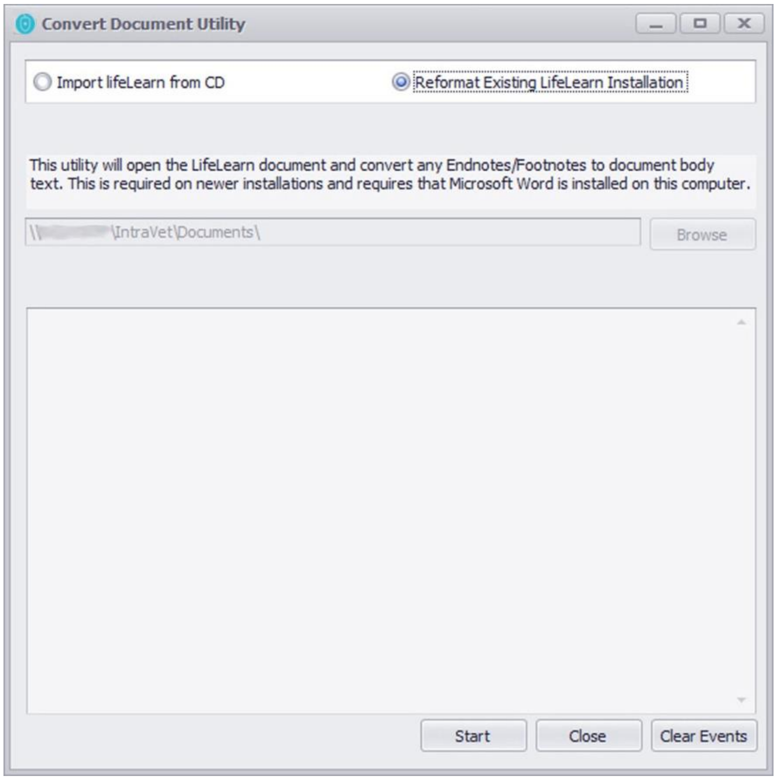
- Browse for Folder screen will open.
- Select Computer (or My Computer) and find the drive where your CD is located.
- Click OK.
- Click Start.



NOTE: This utility cannot be interrupted or stopped once the Start button is clicked. The program makes the changes and automatically closes the window.

Reformat Existing LifeLearn Installation

- Select the Reformat Existing LifeLearn Installation radio button.
- Select the document; double-click to open.



Financial Utilities

The Financial Utilities function affects the financial information associated with client records.

Account Period Locking (and QuickBooks® Export)

IntraVet's financial information can be transferred to QuickBooks®.

The chart describes the account names and account types that are used during the transfer. IntraVet creates these accounts in QuickBooks® the first time you import data into QuickBooks®.

DO NOT create these accounts in QuickBooks® yourself.

Account Names	Account Types	
Accounts Receivable / IntraVet	Accounts Receivable	AR
Fees for Services / IntraVet	Income	INC
Sales Tax Payable / IntraVet	Other Current Liability	OCLIAB
Cash in Drawer / IntraVet	Other Current Asset	OCASSET
Checks / IntraVet	Other Current Asset	OCASSET
Credit Cards / IntraVet	Other Current Asset	OCASSET
Debit/Credit Adj. / IntraVet	Income	INC
Billing Fees / IntraVet	Income	INC
Monthly Interest / IntraVet	Income	INC

When you run period locking, users cannot remove data from a prior date. This protects your IntraVet data from attempts to change periods that have already been "closed." If you select "Export to QuickBooks®," IntraVet prepares an export file to be imported to the QuickBooks® program.

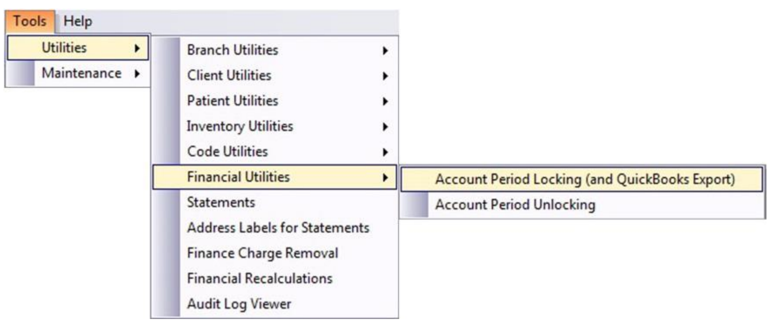
Your First Transfer

The first QuickBooks® Transfer and Period Closing in IntraVet is unique. This transfer locks the period and creates a starting place for the IntraVet/QuickBooks® link. After this first transfer has been done, IntraVet is locked and you cannot backdate any entries prior to the first transfer date.

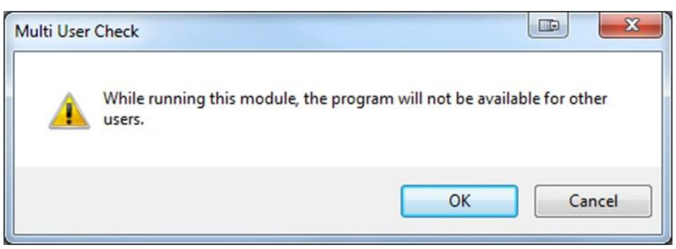
Transactions within a locked period cannot be deleted or changed. However, you will still be able to backdate invoices (after the initial transfer). Invoices that are backdated can be deleted until the period that they were entered in has been locked.

The IntraVet/QuickBooks® link will record new transactions added to locked periods. These added transactions appear on the Period Locking Report.

- From the IntraVet Menu Bar, select Tools | Utilities | Financial Utilities | Account Period Locking (and QuickBooks® Export).



- A Multi User Check will pop up. Click OK.



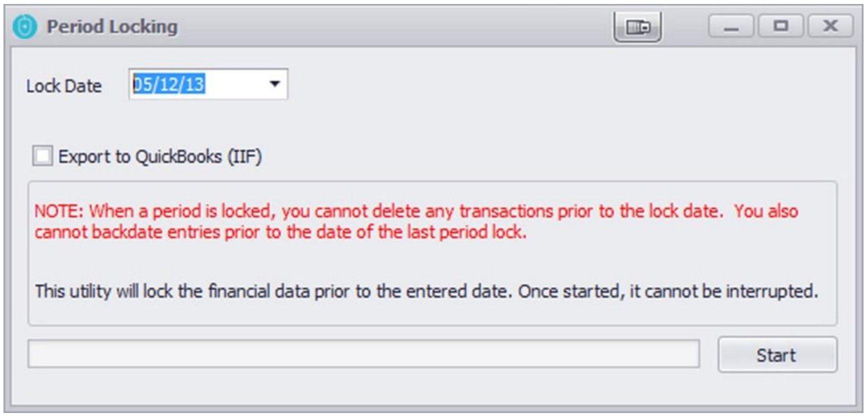
- Enter a Lock Date, or click the down-arrow and choose a date from the calendar.

  It is recommended to wait until the 15th of the month to close out the previous month. If this is the first time you are running the transfer, you may choose 12/31 of the previous year as your first closing date in IntraVet.

- Click the Export to QuickBooks® box if you use QuickBooks®.
- Click Start.

NOTE: This utility locks the financial data prior to the entered date. The process cannot be interrupted or stopped after you click the Start button.

IntraVet will print a Period Lock Report that displays the Lock Date, a list of accounts, the amounts of debits and credits to these accounts, and final totals for Debit and Credit.

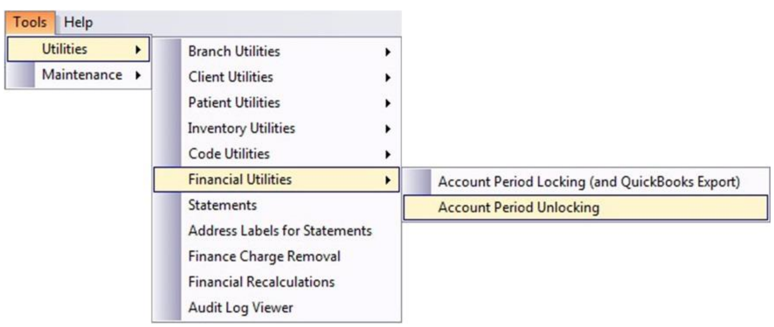


Account Period Unlocking

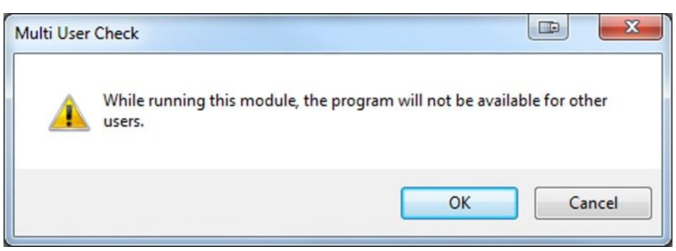
You can undo transfers within IntraVet to unlock previously locked periods. When a period is unlocked, you can delete transactions within that date range. This utility unlocks the last period that was closed.

Be careful to import the data from a period into QuickBooks® only once, or you will have duplicate entries. You may unlock only the most recently locked report.

- From the IntraVet Menu Bar, select Tools | Utilities | Financial Utilities | Account Period Unlocking.



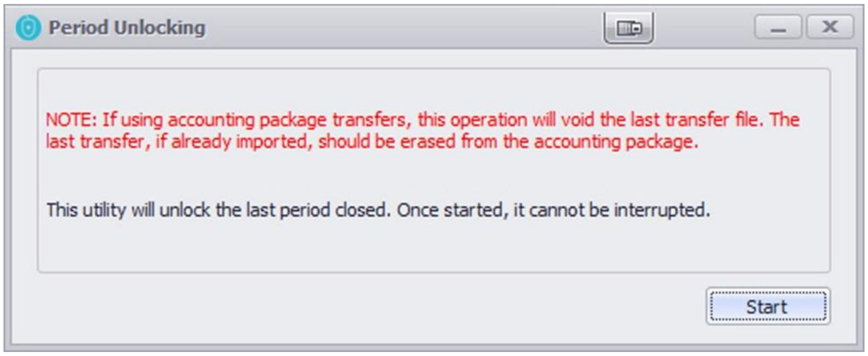
- A Multi User Check will pop up. Click OK.



- Click Start.

  Unlocking a period will void the last transaction if you use accounting package transfers. If the last transfer has already been imported, delete it from the accounting package.

  NOTE: The process cannot be interrupted or stopped after you click the Start button.



Make the necessary changes and then rerun the QuickBooks® transfer utility for the same period. Import the new IIF file into QuickBooks® only if you have not already done so; otherwise, duplicate entries will be made for that period.

Statements

You can print statements for clients with balances, calculate billing and monthly interest percentages, and apply these charges to clients with balances that are designated to receive such charges.

Each client entered into your system is assigned four billing variables that affect statements:

- Billing Fee
- Interest
- Statement Type (Summary, Detail or None)
- Terms of COD, 30, 60, or 90 days.

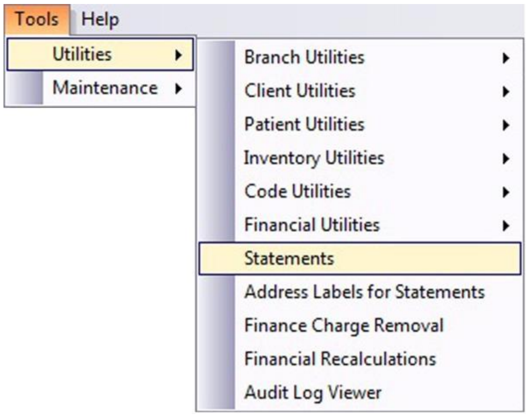
Each statement is generated according to the parameters in each client's record (see Client Setup).

When preparing to print statements, certain decisions must be made whether or not to:

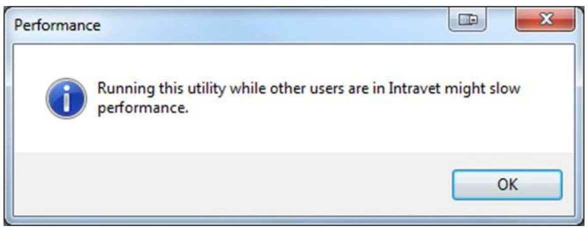
- Print Statement Messages.
- Send a statement to a client with less than a certain balance.
- Charge billing fees and monthly interest percentages to clients already set up for these charges.
- You can charge billing fees only to past due accounts or to charge only the greater of the two: monthly interest or billing fee.
- Charge the greater of the billing fee and interest.
    - IntraVet will automatically charge both billing fee and interest if the above is not selected.
- Send statements to all clients or to clients with certain classification codes.

To generate an itemized statement for one client:

- From the IntraVet Menu Bar, select Tools | Utilities | Statements.



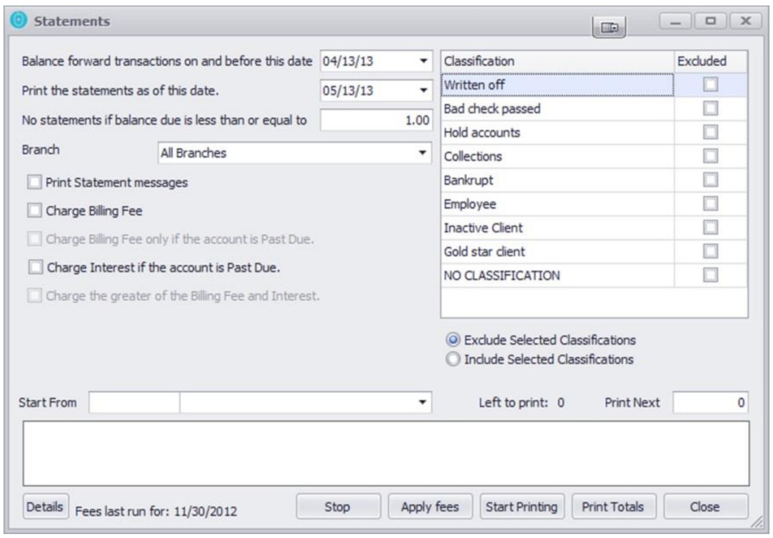
- A performance warning will pop up. Click OK.



- Select the date(s) and check the pertinent boxes that apply to this client.
  - Balance forward transactions on and before this date – Whatever date is selected in this box will be the beginning date for the statement. Any balance on the account before this date will show as an amount only.
  - Print the statements as of this date – This date will be the ending date range for items printed on the statement.
  - No statements if balance due is less than or equal to – If a client's balance is less than the amount entered in this field, that client will not receive a statement.
  - Branch – Allows you to print statements for only the selected branch.
  - Print Statement messages – This includes a message on each statement, depending on the age of the balance.
  - Charge Billing Fee – If a Billing Fee is set up, each client that is marked to be charged a Billing Fee will have it applied.
  - Charge Billing Fee only if the account is Past Due – This will only charge clients that are set up to get a Billing Fee and have a Past Due balance.
  - Charge Interest if the account is Past Due – This will only charge clients that are set up to be charged Interest if they have a Past Due balance.
  - Charge the greater of the Billing Fee and Interest – This will charge the client the greater amount (either the Billing Fee or Interest) if their account is Past Due.
  - Classifications – This area allows you to exclude or include groups of clients based on their classification.
  - Exclude Selected Classifications – Excludes any selected classifications.
  - Include Selected Classifications – Includes any selected classifications.

- In the blank Start From entry line, enter the client's account number, or double-click in the blank entry line and scroll to the desired client. Press Enter to move the client's name into the entry line.
    - If the number 1 is entered, it will begin with the first account and start processing from the first account that is found that matches the selected criteria.
- Enter a number in the Print Next field to print that number of statements, pause. If the number 1 is entered the next one statement will print. If left blank, all statements will print at one time.

Often, when printing one statement, billing fees and interest are not charged.



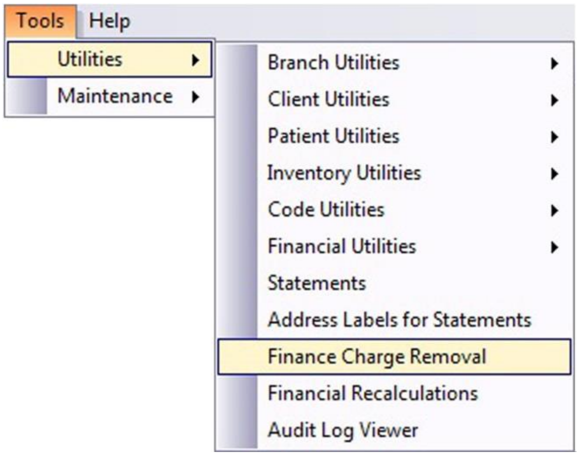
The buttons along the lower edge of the window provide more options. For example, Details provides additional information about the client's account.

- When you are finished making selections, click the Print Totals button.
- When you are ready to print statements, click Start Printing.
- To exit, click Close.

Finance Charge Removal

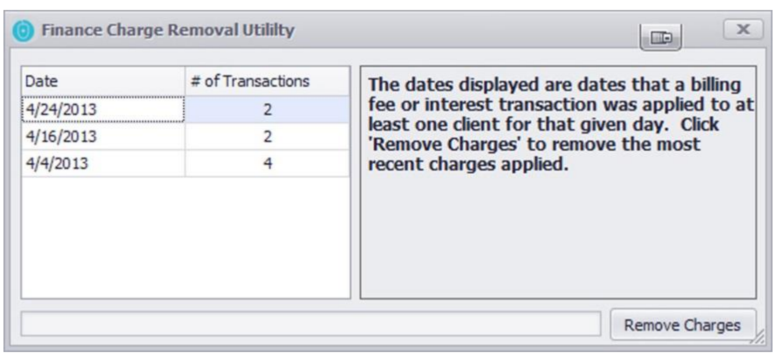
This utility displays a list of dates and transactions for clients who had a billing fee or interest transaction applied to their accounts for any given date of service. The program automatically gathers data and displays a progress bar when the window opens.

- **From the IntraVet Menu Bar, select Tools | Utilities | Finance Charge Removal.**



The Finance Charge Removal Utility screen will appear. After the progress bar finishes:

- **Click Remove Charges to delete the last charges applied to a client's account.**



This utility will remove both billing fee and interest rates.

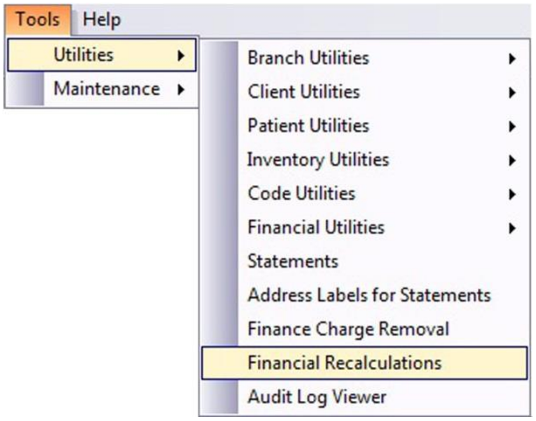
Financial Recalculations

Sometimes, the client balance due in the client window does not correspond with the balance due on reports. Financial Recalculations recalculates the client balance based on all the financial entries for that client.

This utility runs quickly through the financial records of each client in the database, and if no problems are found, only one pass is made. If the system finds problems, on the second pass you are alerted to back up your data before continuing. Please back up your data if this message appears. Automatic changes are made to your client financial records to correct the inconsistent data in the financial history.

When clients make a payment toward an outstanding balance, this utility recalculates their account balances according to what has transpired in their account and displays the results in the transaction window.

- From the IntraVet Menu Bar, select Tools | Utilities | Financial Recalculations.

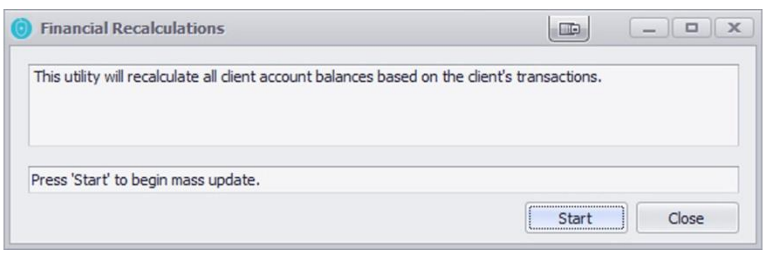


- Click Start.

You will need exclusive use of the program when running this utility. Alert your staff that IntraVet will not be available while this utility is running.

The amount of time needed to run this utility can vary greatly depending on the size of your data files and the length of time your practice has been using IntraVet.

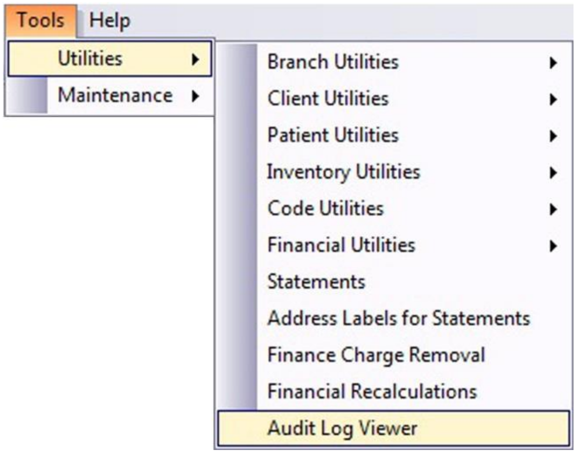
- When the process is complete the window will close and you will be back to the IntraVet desktop.



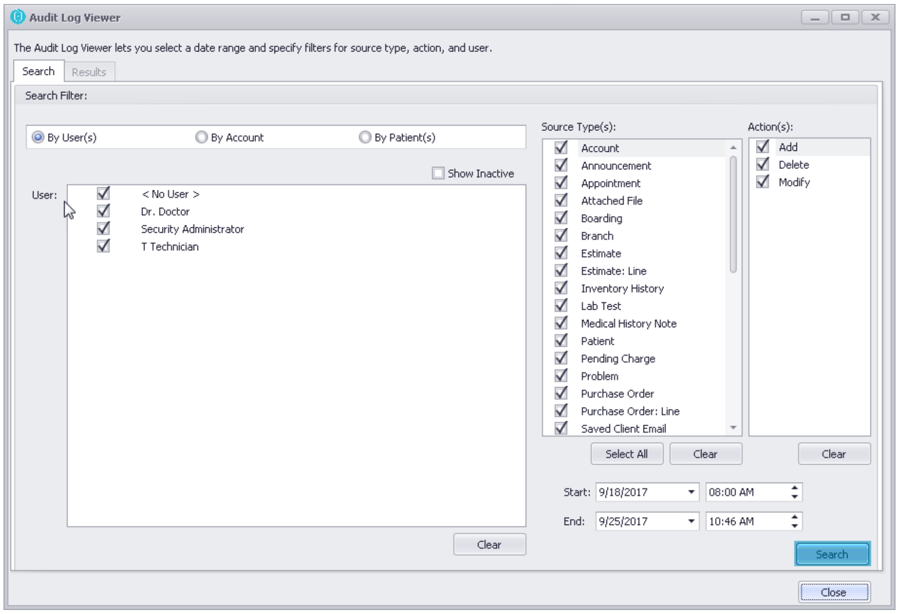
Audit Log Viewer

The Audit Log Viewer allows you to see who made changes to a specific area within the program. For example, if an employee deletes an appointment, you can find out who deleted that appointment along with the date and time if you have security set up. The Audit Log Viewer is a feature that helps to keep track of entering, modifying, and deleting information within the IntraVet Database for security and tracking purposes. There are three broad filter categories to set up a search query: User, Source Type and Action. Each of these broad categories contains numerous sub-filter options.

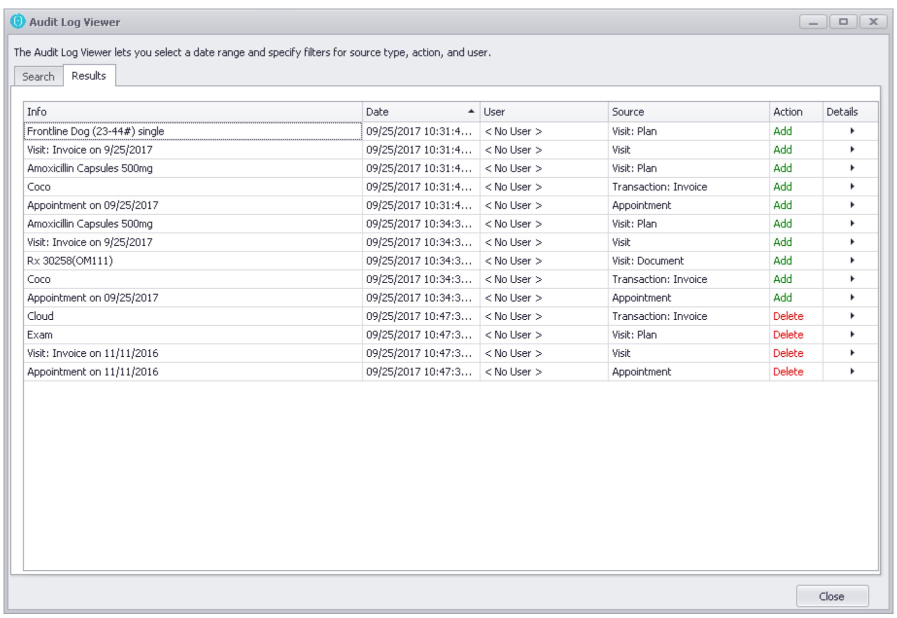
- From the IntraVet Menu Bar, select Tools | Utilities | Audit Log Viewer. The window opens by default to the Search tab.



- There are three main filters in which to specify your search. They are By User, By Account, and By Patient. Which filter may need to be used depends on what is being searched. Each area has a different set of source types with which to narrow down the search results. To run a search, take the following steps:
- Choose the search filter: By User, By Account, or By Patient.
  - a) By User – this allows a search by specific employee or user within IntraVet.
  - b) By Account – this allows a search for a specific client account.
  - c) By Patient – this allows a search for an account for a specific patient.
- Choose the source type; these differ depending on the search filter used.
  - a) You can minimize or maximize the results of your search depending on the selections the search is run for with these check boxes. Use the Clear button to remove all checkmarks by all items, if you want only one or a few items checked.
- Choose the action type: Add, Delete, and Modify
- Enter a Start and End Date, or click the down-arrow and choose the dates from the calendars.
- Enter Start and End times, or click the down-arrow and scroll to the desired times.
- Click Search.



- The Results tab will display once the Search has been completed.
- If security is not enabled all users in the results list will appear as < no user >.



- When you are finished, click Close.

Information stored within the Audit Log Viewer does not allow for the information to be populated back into IntraVet should it be deleted. It is strictly a tracking system for information that may be deleted.

Maintenance

System Setup

The System Setup feature is where you align your computer's configuration settings to talk to the IntraVet server.

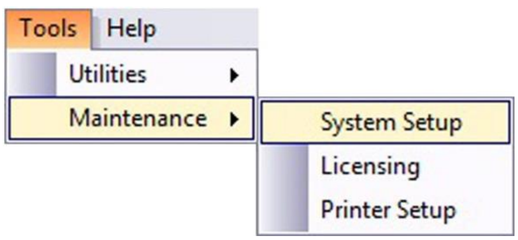
System Setup rarely needs to be changed or maintained. If you need to make changes to the path to your files and you have an IT person at your practice, s/he will be able to adjust these settings. Otherwise, if you need assistance, please contact a Support Specialist at 1.800.422.8875. IntraVet Support is available between:

7:00 AM and 7:00 PM, Monday-Thursday, Central Time.

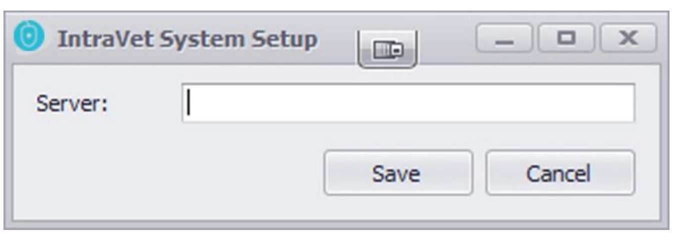
7:00 AM and 6:00 PM, Friday, Central Time.

8:00 AM and 12:00 PM, Saturday, Central Time.

- From the IntraVet Menu Bar, select Tools | Maintenance | System Setup.

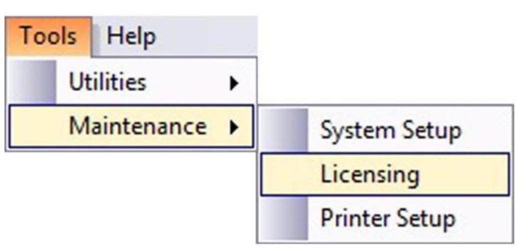


- By default, the Server computer's name is displayed in the Server field. If this is correct, click either Save or Cancel. If it is not correct, Enter the name of the Server computer and click Save.



Licensing

- From the IntraVet Menu Bar, select Tools | Maintenance | Licensing.
  - Should the IntraVet license key be needed for anything it can be found in this location.

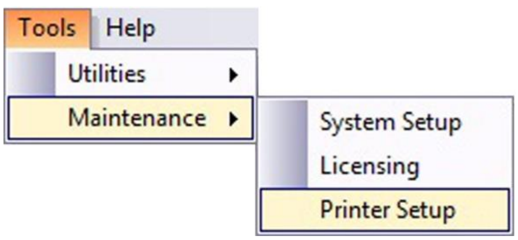


- Verify License Key. Click OK.

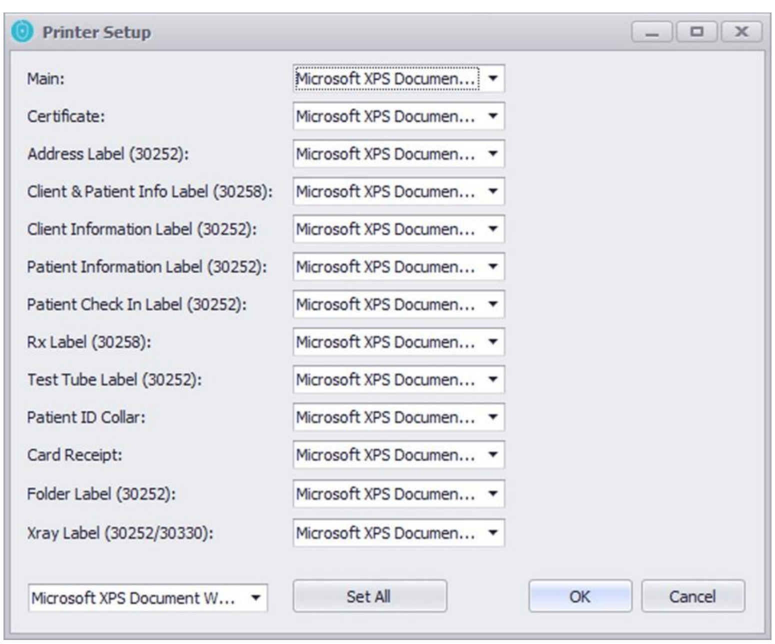
Printer Setup

IntraVet uses Microsoft Windows® for all printer handling. You must have your printers installed on the workstation before you enter Printer Setup. If you are having printing problems, IntraVet recommends that you verify that you have the latest printer drivers from your printer manufacturer installed on each of your computers.

- From the IntraVet Menu Bar, select Tools | Maintenance | Printer Setup.



- Click the down-arrow to assign a printer to each category.
- Select a printer name to select it.
- When all printers have been assigned, click OK to record the changes.
- If you want all categories to be set to the same Printer, click the down-arrow in the field at the bottom left of the screen. Select the printer. Click Set All. This will set all the categories to that printer.



Database Copy

The IntraVet database is most often stored in Program Files\Microsoft SQL Server\... instead of directly in the IntraVet Folder on the server. Due to this change, the included commands allow you to create a copy of the required IntraVet database files that are needed in the event of a restore.

This command does NOT take the place of your normal external backup program and device. It simply makes a copy of the files and places that copy in the IntraVet folder on the server. This will allow your normal backup software access to those files.

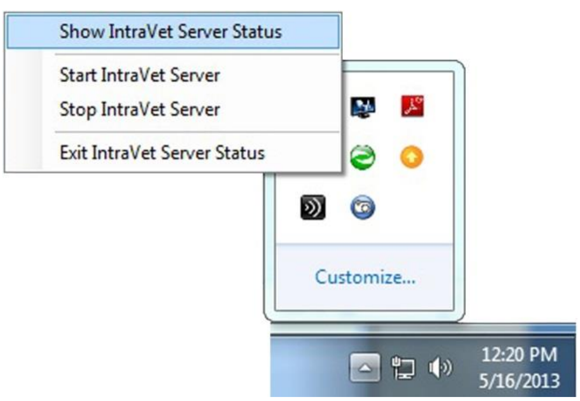
Having a secure external backup is vital to protect your practice data.

You must back up your intravet.bak and intravetAudit.bak database files every day your practice is open, monthly and yearly. You also must use an external system to perform the backup.

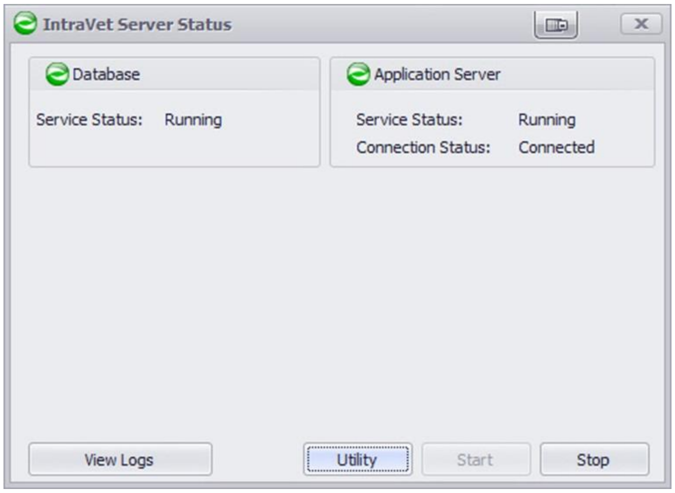
Each time the command is completed, it adds an additional backup set to the existing filename. If you need to restore your database or if you need assistance with backing up the intravet.bak or intravetAudit.bak files, please contact IntraVet Support at 1.800.422.8875 for assistance.

Make a Database Copy

- Right-click on the IntraVet Server Status  icon, located in the System Tray.
- Select Show IntraVet Server Status.



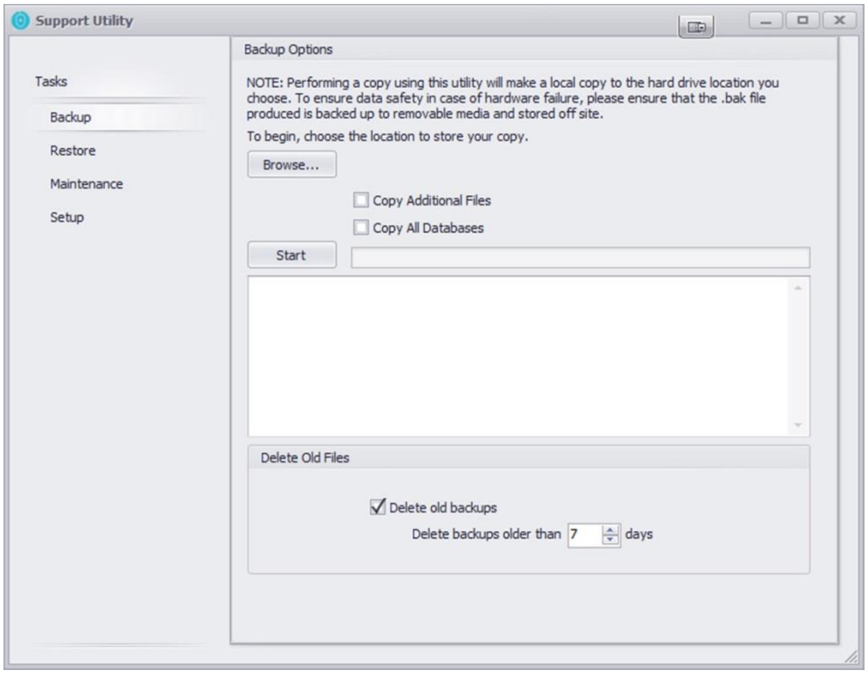
- Click Utility.

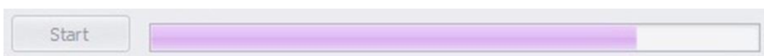


- Under Tasks, select Backup.

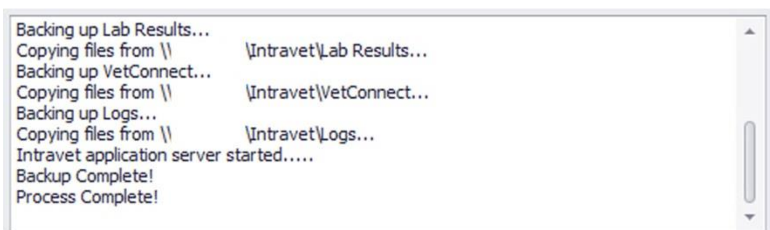
NOTE: Performing a copy using this utility will make a local copy to the hard drive location you choose. We recommend this backup be to the C:\program files\intravet\backup folder. If this folder does not exist open the Intravet folder, right mouse click and choose new, folder, and rename it to backup. To ensure data safety in case of hardware failure, please make sure the .bak file produced is backed up to removable media and is stored off-site.

- Browse to the location to store your copy.
- Check the Copy Additional Files box if you need to copy your documents, pictures, etc. What this check box copies is what is listed below. We recommend this be done once a week unless you heavily use documents and attach files, which should be done daily.
    - C:\IntraVet Server\API Settings
    - C:\IntraVet Server\Attached Files
    - C:\IntraVet Server\Documents
    - C:\IntraVet Server\Lab Results
    - C:\IntraVet Server\Logs
    - C:\IntraVet Server\Logos
    - C:\IntraVet Server\Pictures
    - C:\IntraVet Server\Signed Documents
    - C:\IntraVet Server\Vet Connect
- Check Copy All Databases, if you need a copy of the IntraVet Database and the IntraVet Audit Database. We recommend this only be done once a week.
- Check Delete old backups. We recommend deleting backups older than 2 days. You can set this number to something else but the backups can be large and take up a lot of hard drive space.
- Click Start.





Backup Process Complete.



If any part of your backup fails, please contact support for assistance at 800.422.8875.

Store a Backup

Once you have completed your backups, it is important that you store your data on an external media, preferably one that can be stored off-site.

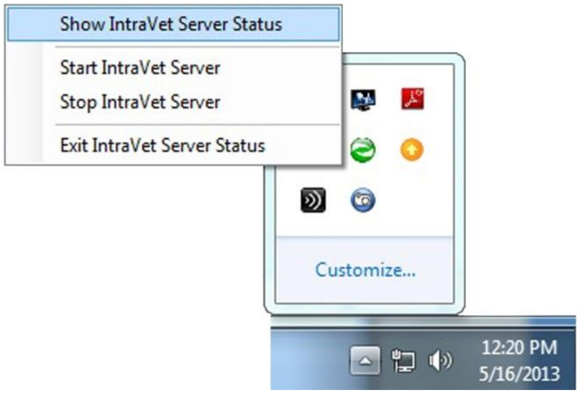
Patterson offers PattLock as an online backup solution or contact your local hardware provider for more information on secure external backup systems for your practice.

Restore

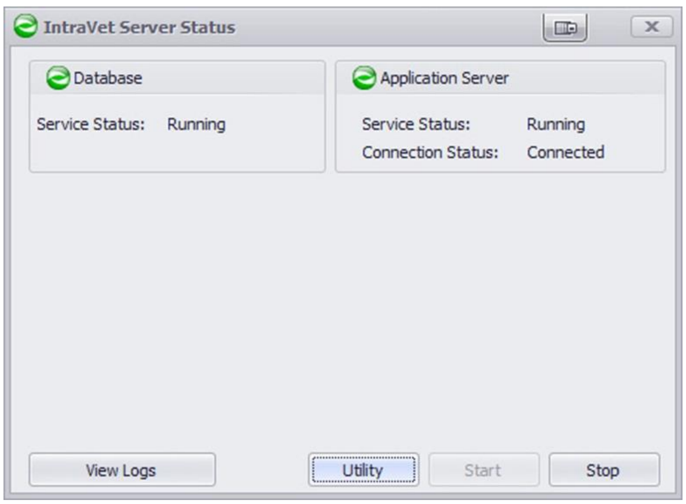
Restoring a previous backup will overwrite all existing data.

We recommend working with IntraVet support before restoring a backup for any reason. It is typically only necessary to restore a previous backup in the event of a database server hardware failure or upgrade.

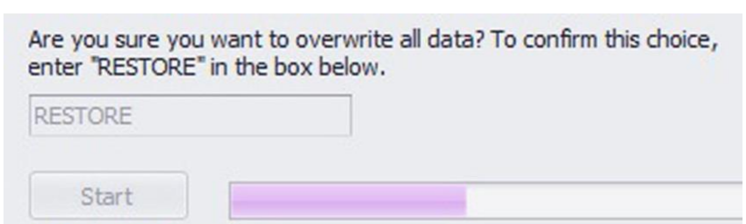
- Right-click on the IntraVet Server Status icon, located in the System Tray.
- Select Show IntraVet Server Status.



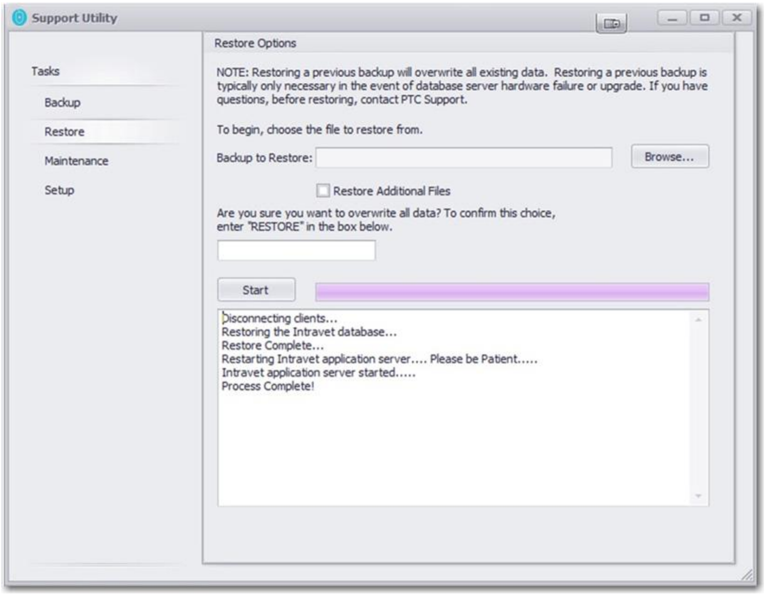
- Click Utility.



- Under Tasks, select Restore.
- Browse to the location to store your copy.
- Check Restore Additional Files (this will restore the Additional Files included in the backup – if that was done when the backup was performed) if desired.
- To confirm, type RESTORE in the blank field.
- Click Start.



- Restore Complete.

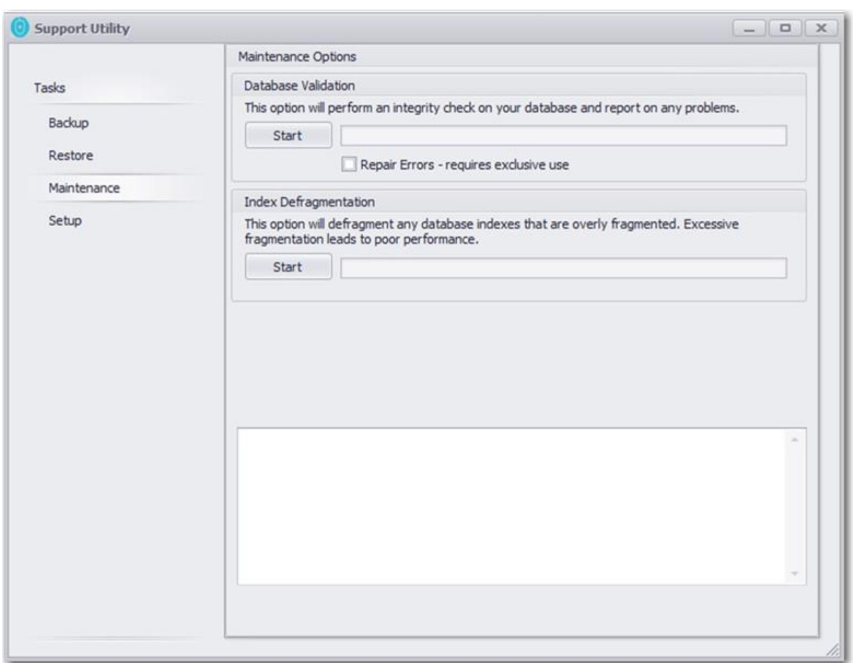


Maintenance

The maintenance options within the Support Utility include Database Validation and Index Defragmentation.

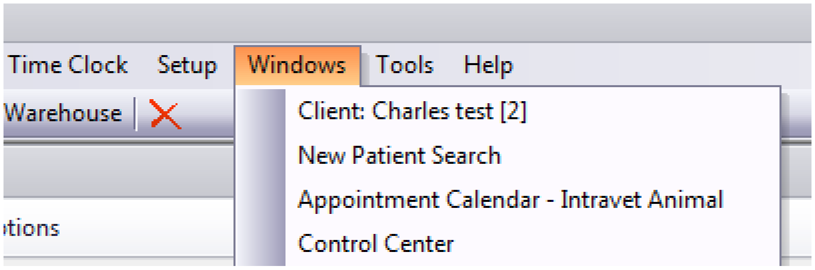
Please work with IntraVet support and make a backup prior to running either of these utilities.

- **Database Validation – Performs an integrity check on your database and reports on any issues.**
- **Index Defragmentation – Defragments database indexes that are overly fragmented. Excessive fragmentation leads to poor performance.**



Windows Option

A windows option has been added to easily navigate between open windows.



Select the Windows menu to view a list of open windows that are currently active. Select from the list of open windows to bring that window into focus.

Index