DVMAX Anywhere

The new DVMAX Anywhere is a flexible, responsive application that works where you do. Whether you're using a tablet, laptop or desktop device, Anywhere offers many of the powerful features of your DVMAX client in a streamlined, web-based framework. With DVMAX Anywhere, you can work with patient or client records, complete scheduled To Do items, create MREs, check the appointment Scheduler, review invoices, present consent forms for electronic signature, view lab results and much more.

Using Anywhere on Desktop and Tablet

DVMAX Anywhere runs on tablet, laptop or desktop. There are a few differences between the available features in Anywhere when running in your browser on a desktop machine and when running from a tablet, but most of the functionality is the same.

Key differences include:

> The desktop application has a sidebar menu that includes the additional options of a To Do by Patient list view and an Appointments list view.

> There are some additional filters for patient searches in desktop view.

> The Labs tab from a Patient record offers a hierarchical view under desktop.

Because most of the general functionality in Anywhere is the same as in DVMAX, you should already be familiar with the basics of working with patient records. For more details on working with DVMAX functionality, like creating and editing MREs, adding MRE Findings, working with lab requisitions, viewing lab results and more, refer to the specific chapters in the DVMAX user guide.

Launching DVMAX Anywhere

You can use Anywhere from you tablet, laptop or desktop. To launch Anywhere the first time:

> From the **Special** menu of the main screen of your DVMAX client, select **DVMAX Anywhere**.
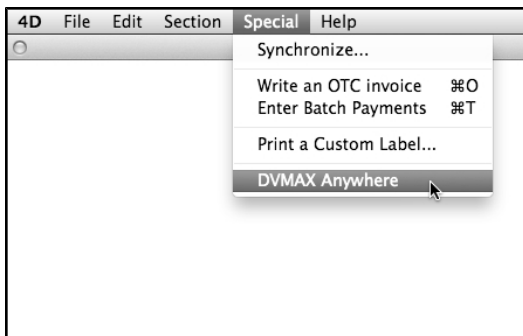
> From the **DVMAX Anywhere** dialog, choose whether to open Anywhere on your current desktop machine or on a tablet. The URL for Anywhere will be shown in the **Enter URL on Tablet** field. This URL can be used by desktop, laptop or tablet.

Open Anywhere on Desktop or Laptop

To open the desktop version of Anywhere:

From the **Special** menu of the main screen of your DVMAX client, select **DVMAX Anywhere**.

Click **Launch Anywhere on Computer** or copy and paste the URL from the **Enter URL on Tablet** field into your browser on your desktop.

DVMAX Anywhere

Enter URL on Tablet: http://192.168.1.34:8080/anywhere/index.html

Enter email on Tablet: [   ]

[Send URL Email]   [Launch Anywhere on Computer]

[Cancel]

Anywhere will open in your default browser.

Bookmark Anywhere in your browser for quick access in the future.

For iPad users: To be sure you can access all of the features of Anywhere on your iPad, you will need to use Anywhere directly from your browser, not from a link saved on your home screen. Safari does not support the ability to open multiple tabs **for links placed on your home screen**, a feature important for viewing images, attachments or WP documents.

Open Anywhere on Tablet

To open DVMAX Anywhere on your tablet:

From the **Special** menu of the main screen of your DVMAX client, select **DVMAX Anywhere**.

You will need to send a link via email to your tablet, then simply click the link in the email to open Anywhere.

If email is enabled in DVMAX, you will see a **Send URL Email** button on the dialog.

Type an email address that can be opened on your tablet in the **Enter Email on Tablet** field, then click **Send URL Email**.

DVMAX Anywhere

Enter URL on Tablet: http://192.168.1.34:8080/anywhere/index.html

Enter email on Tablet: [your_email@email.com   ]

[Send URL Email]   [Launch Anywhere on Computer]

[Cancel]

If you do not have email enabled in DVMAX, copy and paste the URL from the **Enter URL on Tablet** field into an email on your email client and send it to your tablet.

Click the Anywhere URL link in the email you sent to your tablet. Anywhere will automatically launch in the default tablet browser.

Bookmark Anywhere in your tablet's browser for quick access.

For iPad users: To be sure you can access all of the features of Anywhere on your iPad, you will need to use Anywhere directly from your browser, not from a link saved on your home screen. Safari does not support the ability to open multiple tabs **for links placed on your home screen**, a feature important for viewing images, attachments or WP documents.

Logging In to DVMAX Anywhere

DVMAX Anywhere requires users to log in. For security reasons, each user is strongly recommended to log in with their own unique username and password. When you are finished with your session, you should log out.

To log in, type your username and password in the respective fields. Click or tap **Login**.

To log out, click the **Logout** ("X") icon.

About the Anywhere Home Page

The Anywhere homepage title bar provides some at-a-glance information about the clinic, including clinic name, number of pending To Dos on the Whiteboard for the current day, number of appointments on the Scheduler for the current day, the current date and time. Below the title bar, there are 4 tabs. Two of the tabs are customizable URLs set by your clinic (see **Customize the Home Page**), one tab lists Lab results, and one tab takes you to a web page that provides general information and news about Anywhere.
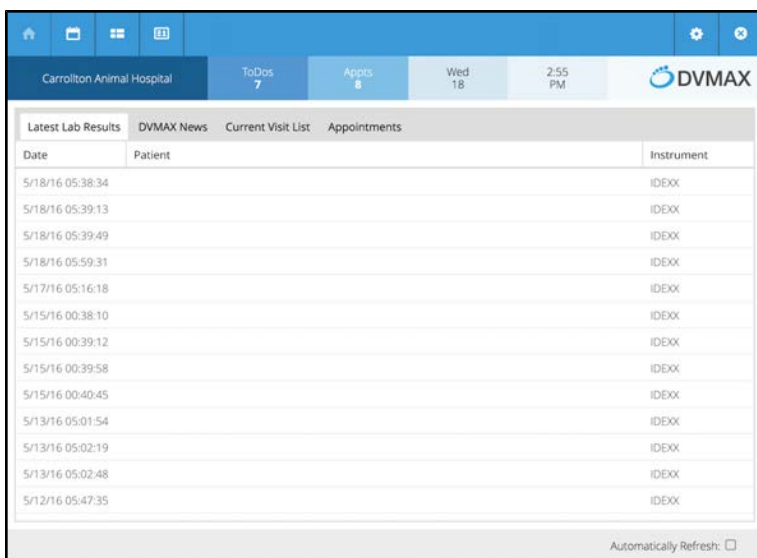
The Labs tab provides a list of lab result records. The default number of days of results shown is 7. This can be adjusted under Advanced Settings. Double click or touch on a result to view details.

The customizable, clinic-defined tabs ship with default URLs from DVMAX, but you can change the URL to a link of your choice by clicking the **Customize** button. For example, you could use the URL for one of the custom report in DVMAX, like the Visit Report or Appointments by Staff Report.

Customize the Anywhere Home Page

You can customize 2 of the 4 tabs on the Anywhere Home page using the **Customize** button.

To customize the tabs on the Home page:

> From the Home page, select a tab. If there is a **Customize** button, you can customize that tab. The Lab Results and News tabs are not customizable.
>
> Click **Customize**.
>
> In the **Title** field, type a short name for the tab.

In the **URL** field, type the address to which you would like to direct this section of the page.

Click **OK** to save.

Refresh the Anywhere Home Page Content

Information on Home screen automatically refreshes every 60 seconds when **Automatically Refresh** is selected. You can choose to manually refresh the page using your browser's reload option. **Automatically Refresh** is located at the bottom of the Home page.

About the Anywhere Main Menu

The main menu for DVMAX Anywhere looks different depending on whether you are using desktop or tablet mode.

Anywhere Main Menu from Desktop or Laptop

The DVMAX Anywhere desktop menu includes **Appointments**, **Scheduler**, **Patients** and **To Dos**.
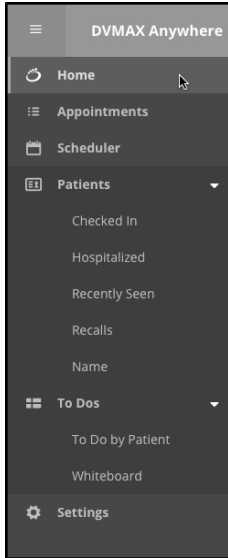
You can view the menu as text and icons or as icons alone by clicking the hamburger icon at the top left corner of the screen to hide/reveal text on the menu.

Menu items with multiple options, such as **Patients** or **To Dos**, can have the sub menu hidden by clicking the white arrow to expand or collapse the view.

Anywhere Main Menu on Tablet

The menu bar when working with Anywhere on a tablet, like an iPad, consists of several icons along the top part of the window, including **Home**, **Scheduler**, **Whiteboard** and **Patients**.
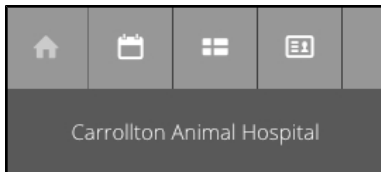
Navigating the Anywhere Main Menu

To navigate DVMAX Anywhere from the Menu bar on tablet or desktop:

Select **Home** to return to the Home page.

Select the **Scheduler** icon to view the Appointment Scheduler.

Select the **Whiteboard** icon to view the Whiteboard and work with To Dos.

Select the **Patients** menu to search for and work with patient records.

Click the **Logout** ("x") icon to log out of DVMAX Anywhere.

Click the **Settings** (Gear) icon to adjust label printer selection (for Prescription label printing).

Settings (Gear Icon)

The **Settings** (Gear) menu lets you select your label printer for use by Prescription label labeling.

Click the **Settings** (Gear) icon to open the Settings panel.

From the Label Printer menu, select your label printer.

Close the Settings panel.

⚠️

Note that DVMAX Client must be running and shared label printing must be enabled in DVMAX in order for Anywhere to access shared Rx label printers.

Appointments Menu (Desktop Only)

The **Appointments** menu provides a list view of all appointments for a selected date and staff. The default view is to show Appointments for the current date and for all staff.

Viewing Appointments By Staff (Desktop Only)

The default Appointment list view is to show Appointments for the current date and for all staff. Use the **Display For** menu to filter appointments by a specific staff.
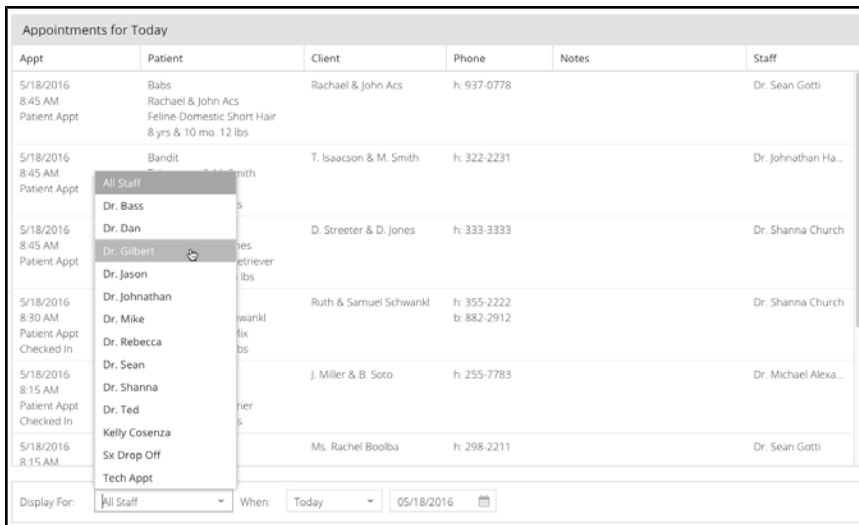
Viewing a List of Appointments by Date (Desktop Only)

The default view is to show Appointments for the current date and for all staff. Use the **When** filters to view appointments for a specified date or date range.
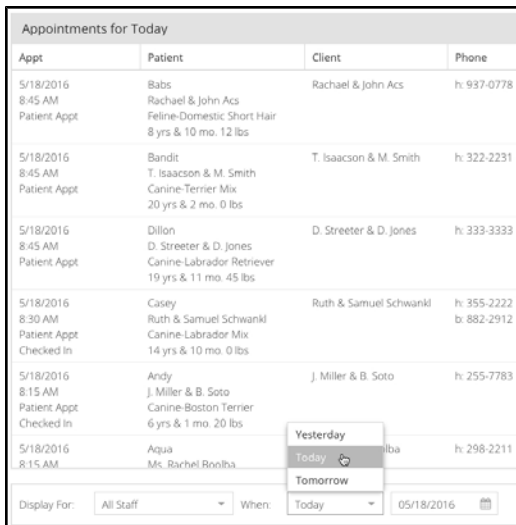
Choose **Today**, **Yesterday** or **Tomorrow** from the drop down menu, or select a date from the calendar field to see all appointments from the selected date forward (showing **every** appointment **Since** the selected date).

For example, if you choose a date seven days in the past, you will see all appointments from that date forward. This includes future appointments. You can sort appointments using the column headings by clicking on the column heading (ascending or descending options).

Double click or tap an appointment to go to the patient record.

To see appointments on tablet, choose the **Scheduler** icon to go to the Scheduler view.

Appointment Scheduler in Anywhere

The Scheduler in Anywhere shows the same type of grid as the Scheduler in DVMAX.

While Scheduler in Anywhere is view only, you can view appointment details, go to a patient record and change patient appointment status from this Scheduler. You cannot create appointments in Anywhere. Appointments will show checked in status, and we strongly suggest people take advantage of this valuable feature in DVMAX.

To work with the Scheduler:

> The Scheduler shows appointments for the current date by default. To adjust the date for the Scheduler, use the **Today**, **Yesterday** or **Tomorrow** buttons or specify a date by picking a date from the calendar field.
>
> Double click an appointment to view appointment details, patient and client information, just like in the DVMAX main app.
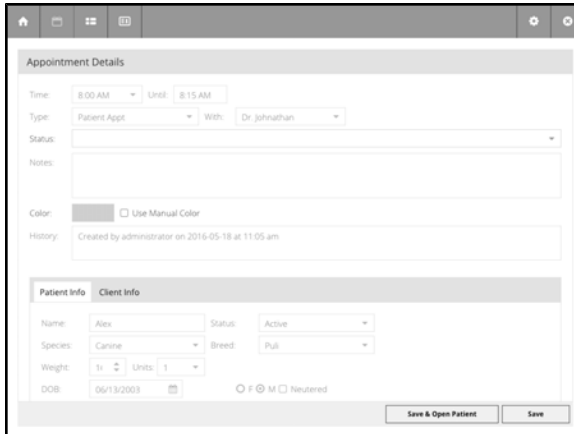
> You can set and change appointment status from the **Status** drop down menu on the Appointment details dialog.
>
> Click **Save and Open Patient Record** to open the patient record in Anywhere.

For more on working with Appointments, including setting patient appointment status, refer to the **Appointments** chapter in the DVMAX user guide.

Appointment Scheduler Change Mode Option

You can display the scheduler as Appointment Time by Staff (default) or Staff by Appointment Time. To change the view, click or tap the **Change Mode** button.
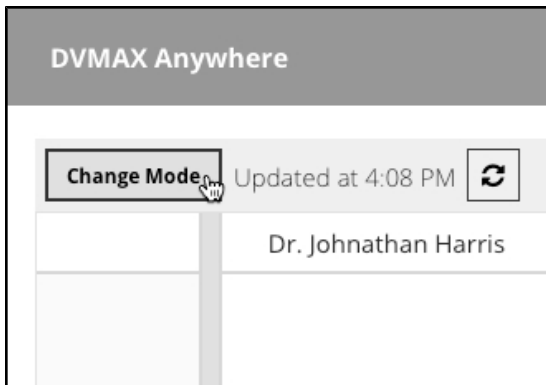
Appointment Scheduler Refresh

The Scheduler is automatically refreshed every minute. This is controlled by a setting in Anywhere. Click or tap the **Refresh** button to manually refresh the scheduler.

Searching for Patient Records in Anywhere

You can use the **Patients** menu to search for and view records for patients who are Checked In, Hospitalized, patients who were Recently Seen, patients with Recalls or search for records by patient Name. Depending on the type of search, you may have options to further refine the search by Staff or other variables.

Searching for Patients with Checked In Status

The Checked In option provides a list of all patients with an appointment status of "Checked In" (see DVMAX manual for details on setting up and using this feature, available in the new scheduler since DVMAX v8).

Patients by Checked In Status Search - Desktop

Choose **Checked In** from the **Patients** menu to view a list of all patients currently checked in to the clinic. From the list of patient records, double click or tap to pick a record. Select a name from the **Staff** drop down menu at the bottom of the page to further narrow the list. The patient list shows a number of details, including Patient ID, Patient Name and Client Name. If there are no Checked In records, the list will be blank.


Patients By Checked In Status Search - Tablet

Select the **Patients** icon from the menu bar. A page opens with a blank patient record displayed. This record is not editable. From the **Type** menu, select **Checked In** to search for patients whose status is checked in.
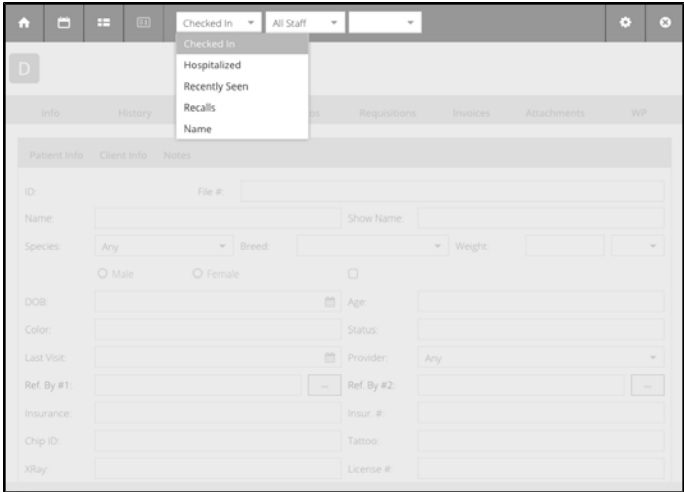
Use the **Staff** filter to further narrow the search. From the list of names, select a record to view. If desired, type a patient name (or partial name) in the **Name** field, then select a name from the drop down list to open the patient record. If there are no Checked In records, the list will be blank.
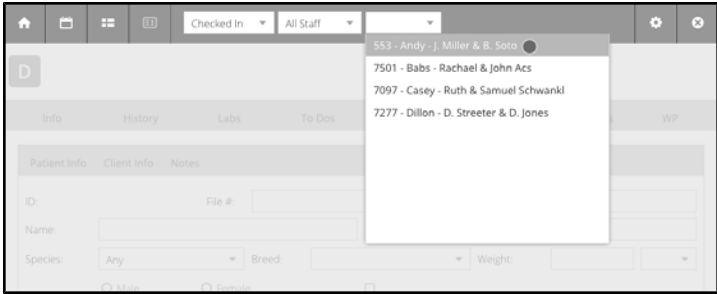
Searching for Patients with Status Hospitalized

The **Hospitalized** option provides a list of all patients that have the status "In Hospital".

Patients By Hospitalized Status Search - Desktop

Choose **Hospitalized** from the **Patients** menu to view a list of all patients with the status "In Hospital". From the list of patient records, double click to pick a record. Select a name from the **Staff** drop down menu at the bottom of the page to further narrow the list. The patient list shows a number of details, including Patient ID, Patient Name and Client Name. If there are no matching records, the list will be blank.

Patients By Hospitalized Status Search - Tablet

Select the **Patients** icon from the menu bar. A page opens with a blank patient record displayed. This record is not editable. From the **Type** menu, select **Hospitalized** to search for patients whose status is "In Hospital".
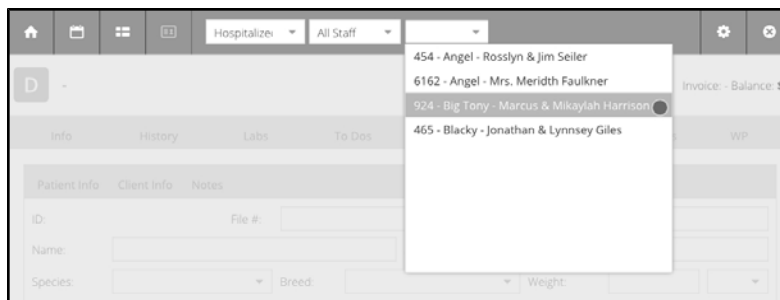
Use the **Staff** filter to further narrow the search. From the list of names, select a record to view. If desired, type a patient name (or partial name) in the **Name** field, then select a name from the drop down list to open the patient record. If there are no matching records, the list will be blank.

Searching for Patients By Recently Seen

The **Recently Seen** option provides a list of all patients that have been seen in a defined period. The default period is Last 7 Days.

Patients By Recently Seen Search - Desktop

Choose **Recently Seen** from the **Patients** menu to see a list of all patients that have been seen in a defined period. The default period is Last 7 Days. Select a name from the **Staff** drop down menu at the bottom of the page to further narrow the list. The patient list shows a number of details, including Patient ID, Patient Name and Client Name. Select a name from the list to open the patient record. If there are no matching records, the list will be blank.

You can pick the **Recently Seen** period from a list (7 Days, 30 Days, 60 Days, 90 Days). Once you have selected a **Recently Seen** period, use the up/down filter beside the selection to increase or decrease the number of days in the selected period.

Patients By Recently Seen Search - Tablet

Select the **Patients** icon from the menu bar. A page opens with a blank patient record displayed. This record is not editable. From the **Type** menu, select **Recently Seen** to search for patients who have been seen in the past 7 days. Use the **Staff** filter to further narrow the search.
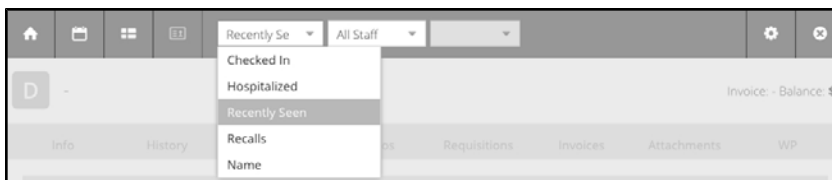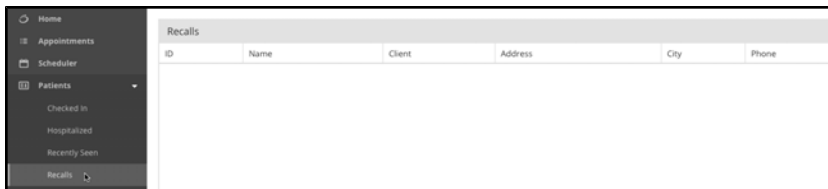
From the list of names, select a record to view. If desired, type a patient name (or partial name) in the Name field, then select a name from the drop down list to open the patient record. If there are no matching records, the list will be blank.

Searching for Patients with Recalls

The **Recalls** option provides a list of all patients that have recalls pending.

Patients with Recalls Search - Desktop

Choose **Recalls** from the **Patients** menu to see a list of all patients that have recalls pending. Select a name from the **Staff** drop down menu at the bottom of the page to further narrow the list. The patient list shows a number of details, including Patient ID, Patient Name and Client Name. Select a name from the list to open the patient record. If there are no matching records, the list will be blank.

Patients with Recalls Search - Tablet

Select the **Patient** icon from the menu bar. A page opens with a blank patient record displayed. This record is not editable. From the **Type** menu, select **Recalls** to search for patients who have recalls pending. Use the **Staff** filter to further narrow the search. From the list of names, select a record to view. If desired, type a patient name (or partial name) in the **Name** field, then select a name from the drop down list to open the patient record. If there are no matching records, the list will be blank.
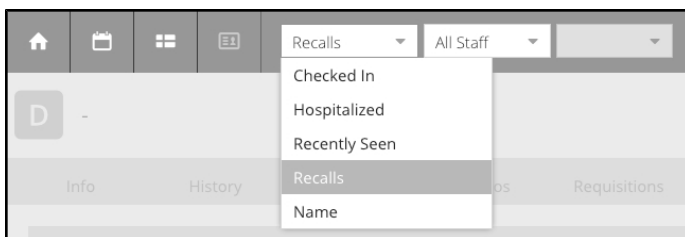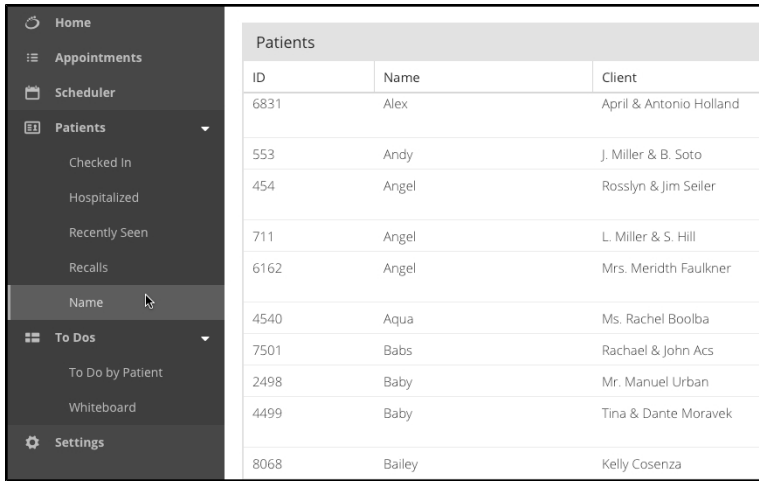

Searching for Patients By Name (All Patient Records)

The **Name** search lets you look up patient records by patient name or client name. On desktop, you can also look up patient records by Staff or by client phone number.

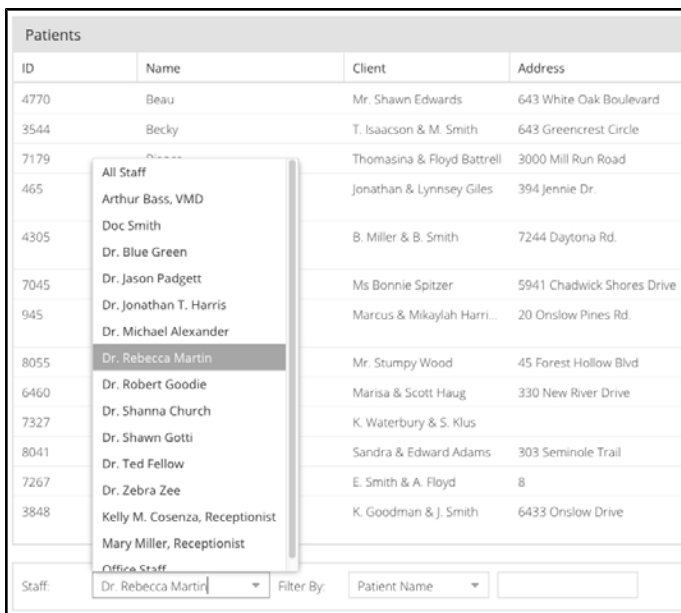## Patients By Name Search - Desktop

To search for patient records by name, click **Name** from the Patients menu. A list of all patients is displayed. Patient names are sorted alphabetically by default.

To find a specific patient record:

From the **Staff** drop down, filter patients by staff.

From the **Patient** combo, select **Patient Name** (default), **Client Name** or **Client Phone Number**. In the text field beside the combo, type a name or number in the field. The list will be filtered by what you type.

The patient list shows a number of details, including Patient ID, Patient Name and Client Name. Select a name from the list to open the patient record.

Patients By Name Search - Tablet

To search for patient records by name, select the **Patients** icon from the menu bar. A page opens with a blank patient record displayed. This record is not editable.

From the **Type** menu, select **Name** (default) to search all patient records by name. Type a patient name (or partial name) or client name in the **Name** field, then select a name from the drop down list to open the patient record.

Working with Patient Records in Anywhere

DVMAX Anywhere lets you access many of the same powerful features of DVMAX in a streamlined, web-based application that works on tablets, laptops and desktop. When working with patient records, that means you can view and edit patient and client general information create and edit MREs, view requisitions and lab results, view invoices, present documents for electronic signature and more.

Open a Patient Record

To open a patient record:

From your desktop or laptop, find a record using the **Patients** menu options, then double click to select a record from the list. From your tablet, use the Patients menu options to find a record, type a name or partial name in the Name field. From the list generated, select the record you wish to view. See **Searching for Patient Records in Anywhere** for more on finding a record.
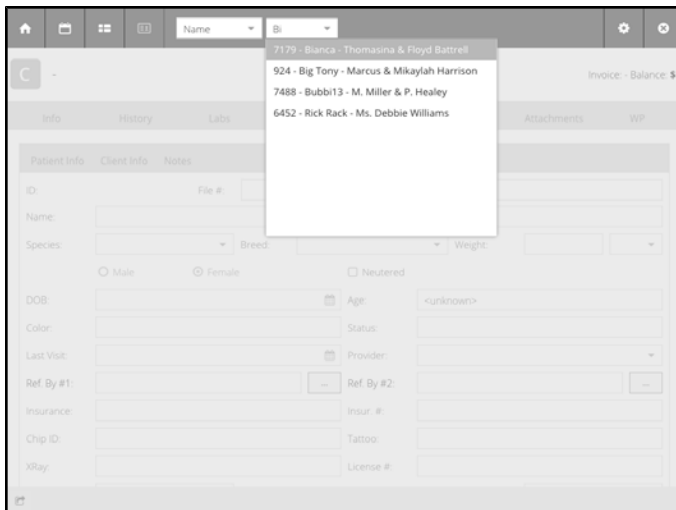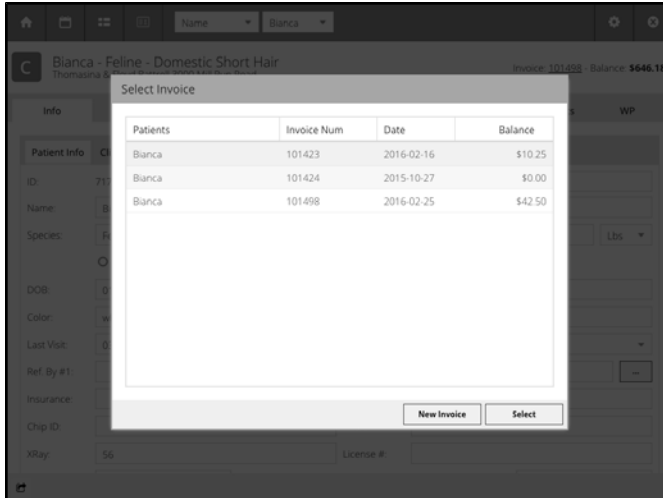

Select an Invoice

When you open a patient record, if there is more than one open invoice for the associated client, the **Select an Invoice** dialog displays before the patient record opens.

Select an existing invoice. Choose an invoice from the list and click or touch **Select**.

-OR-

Choose **New Invoice** to begin a new invoice.

Once you select an invoice, the patient record will open.

View the Select an Invoice Dialog

The **Select an Invoice** dialog displays when you open a patient record for which there is more than one open, unfinished invoice. If you would like to view the dialog once you have opened a patient record, you can click the invoice link on the top right corner of the patient record.
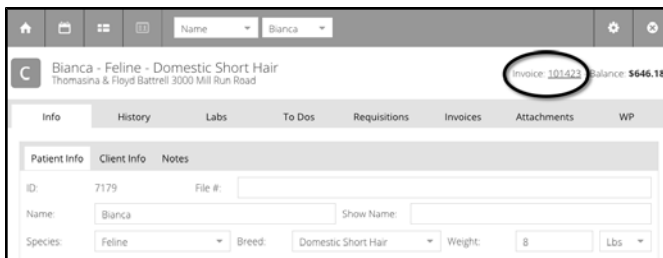
About the Patient Record

The patient record in Anywhere consists of a series of 8 tabs. Above the tabs in the top right corner is the number of the current invoice and the client balance. In the top left corner of the patient record, there is a Quick Glance patient ID area, including patient species identification icon, patient name, species and breed, plus the client's name and address.
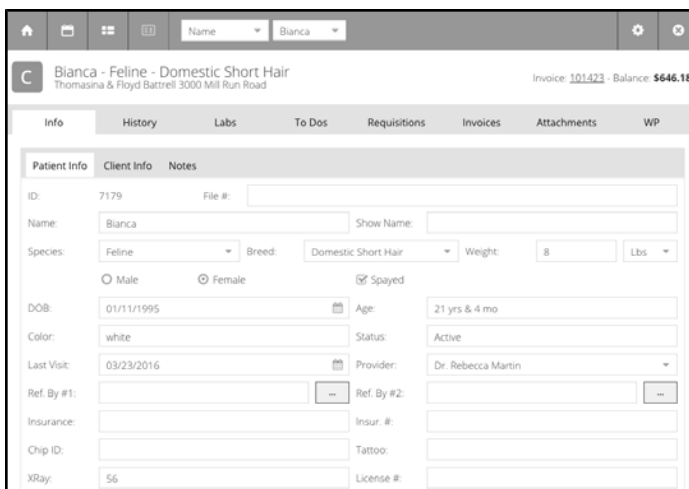
You navigate the patient record much the same way as in DVMAX client. Keep in mind that from a tablet, you may not see the full screen and you may need to scroll up and down to see the full panel in some cases. Alternatively, you may want to rotate the tablet between landscape and portrait modes to maximize viewing area for certain screens.

Sharing Patient Information Via Email

DVMAX Anywhere lets you quickly email patient information using the **Share** button in the bottom left corner of the patient record. To email a patient record link:

Click the **Share** icon, located in the bottom left corner of the patient record.
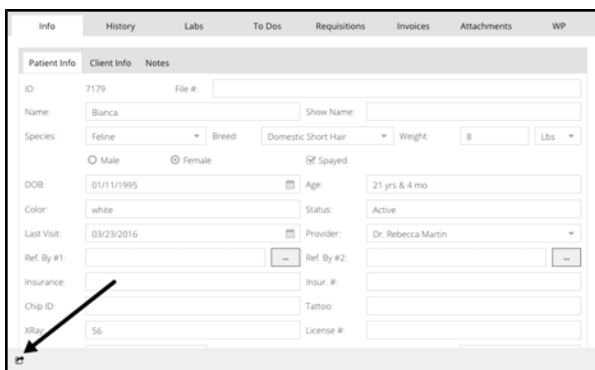
In the Email Address dialog, enter the email address of the recipient in the **Email** field and click **OK**. An email with the link to the patient record will be send to the email recipient.
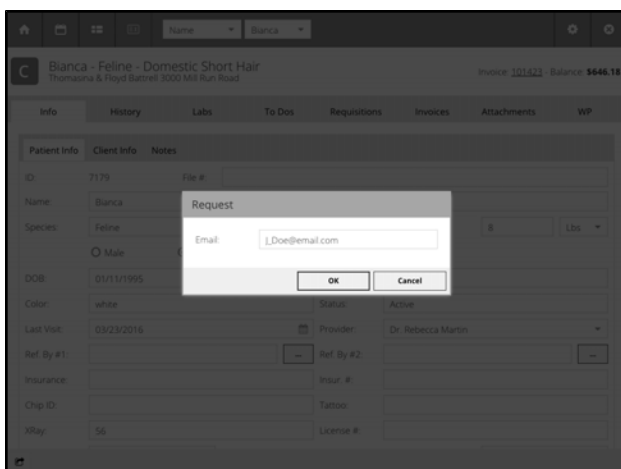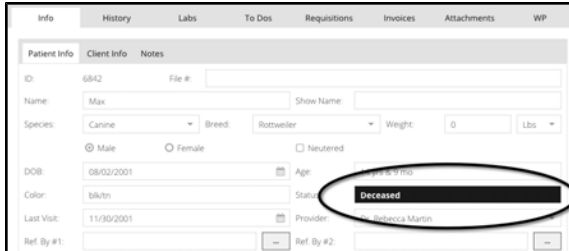

Patient General Info Tab

The Patient General Information tab in Anywhere offers most of the same detail as what you will find in DVMAX.

Patient Alerts are displayed in red font at the top of the **Patient General Info** area, above the **Patient ID** field.

Deceased Patients – The **Deceased** field is highlighted if the patient is deceased.

Recalls and **Reminders** appear at the bottom of the **Patient Info** screen, just like in DVMAX. You will also see these areas at the bottom of the **Client Info** page and **Notes** page. You can sort the Reminders and Recalls areas by ascending or descending Date or Reminder/Recall name by clicking the header.
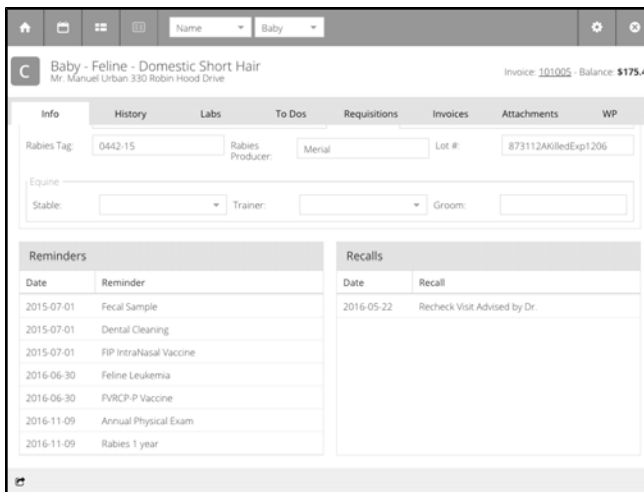
Referral Source - Click the box beside the **Referral** field to see a list of referral sources. Select from the list.

Closing a Patient Record (Desktop) – You need to close the patient record before you can navigate away from an open record in desktop mode. To save and close a record, click **Save**. To cancel, click **Cancel**. This is not necessary when using Anywhere on tablet.

Client General Info Tab

Basic **Client General Information** is provided in Anywhere in a tab beside the **Patient General Information**. Client details include name, address, email, phone number and occupation.

For more detailed information, including complete financial history, you will need to use DVMAX client. Invoice history associated with the current patient is provided under the **Invoices** tab.

A Client Alert, where applicable, displays at the top of the **Client General Info** area, above the Client Title field.

Notes Tab

The **Patient Notes** area offers the same information as is present in DVMAX client, including Major Problems, Comments and a weight graph/chart.
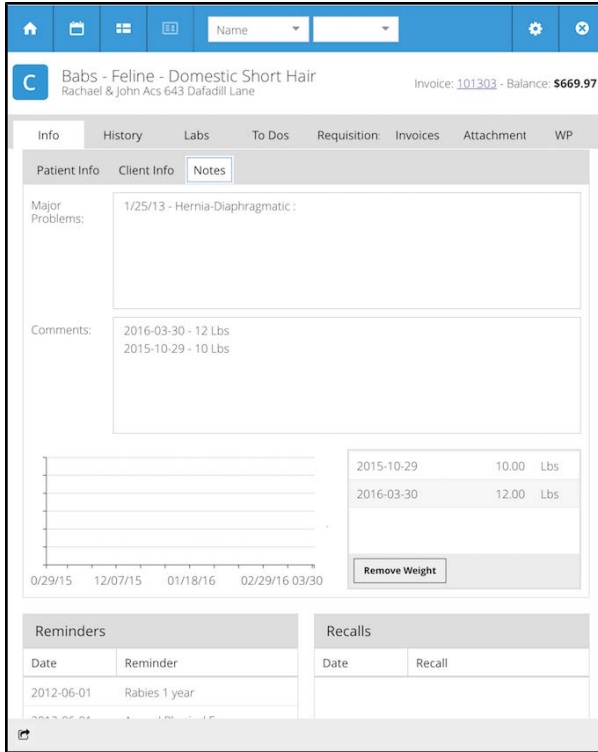
History

Just like in DVMAX, Anywhere's Patient **History** tab lets you view, edit and create Medical Record Entries. A text view is available from the **Text View** tab.

Text View

To view MRE History text view, select the **Text View** tab under **History**.

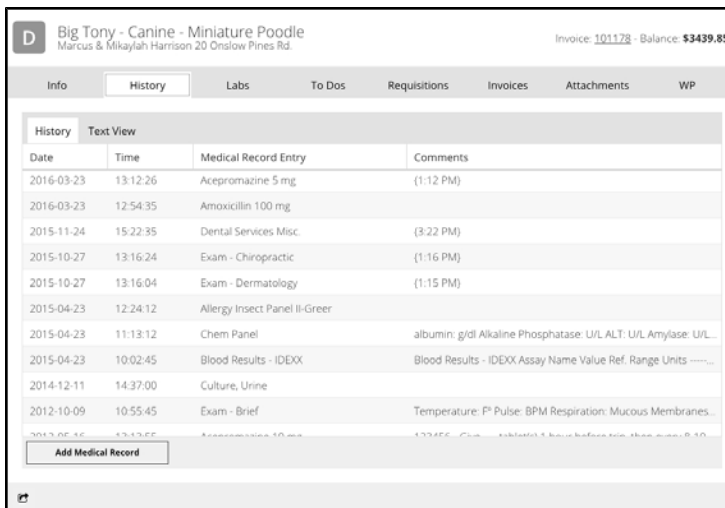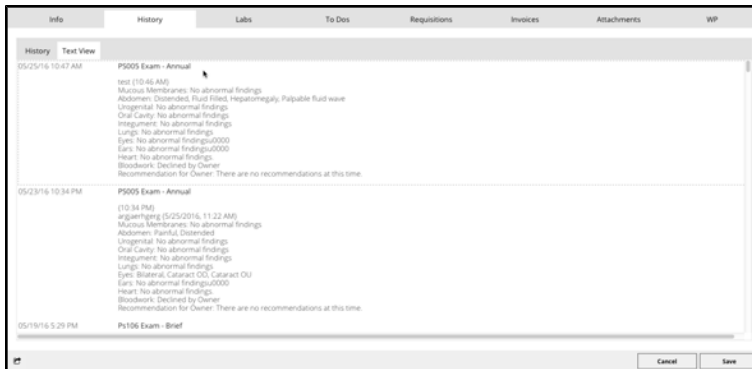Click or touch to select an MRE in text view. This will open the associated full MRE record. You can view or edit the MRE. Close the MRE to return to text view.

You can use your browser's Print function to print the text view.

View an MRE

From the **History** tab, tap or click to open the MRE you wish to view.

Add an MRE

The process of creating an MRE is the same as in DVMAX.

To create a new Medical Record Entry:

Click Add MRE.
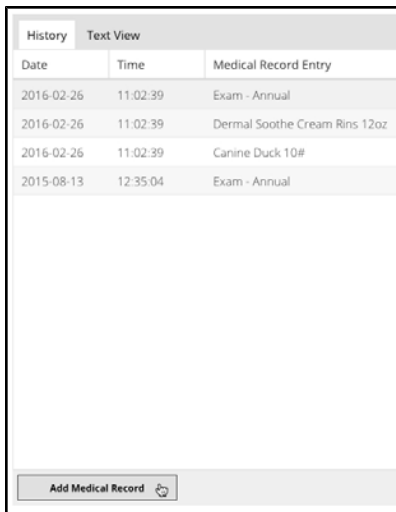
The MRC dialog is divided into 2 parts, the MRC Categories list and the MRC Code and Description. By default, Anywhere displays a list of the most commonly used MRCs. Select a different category to view other MRC lists, or choose **All** for a list of all MRCs.

From the Select MRC dialog, choose the item you wish to add.

Use the Filter field to search by Code or Description. Remember, Anywhere will search for matching keywords or codes only in the MRC Category selected.

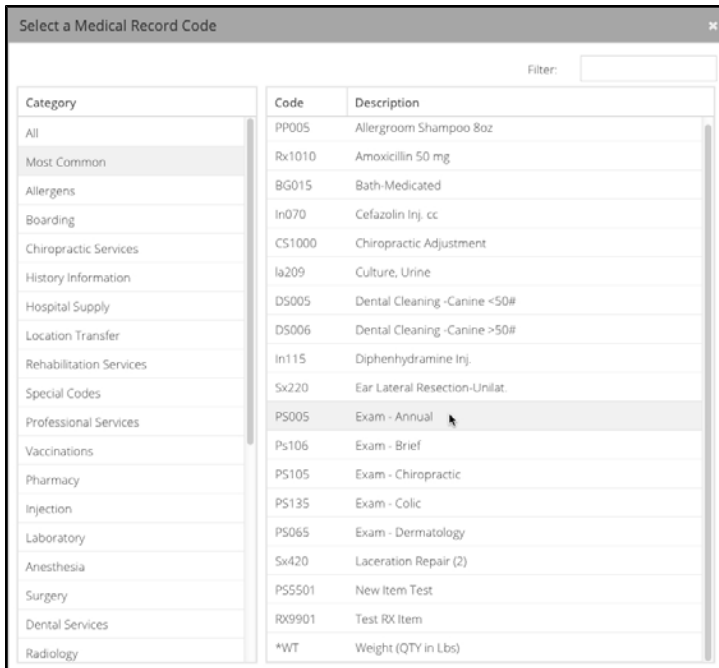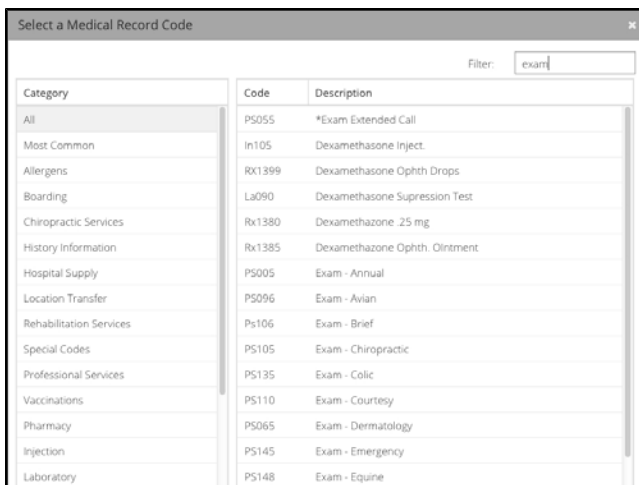In the MRE dialog, enter Findings and Comments as applicable.

Choose **Save Medical Record Entry** to save the MRE or choose **Cancel** to exit the MRE without saving.

If the MRC is linked to a Requisition Code, a requisition will be created. You must be in DVMAX to submit requisitions, but you can create a requisition in Anywhere.
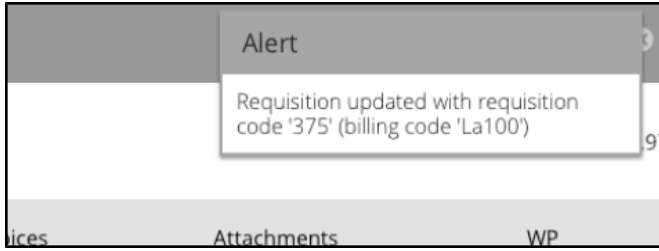
MRE Findings and Options

Adding MRE comments and findings is done in much the same way as in DVMAX.

> Type comments in the **Comments** field.
>
> If there are Findings associated with the MRC, a Finding Items list will display. In the Finding Items list, click or tap the Finding item with which you want to work.
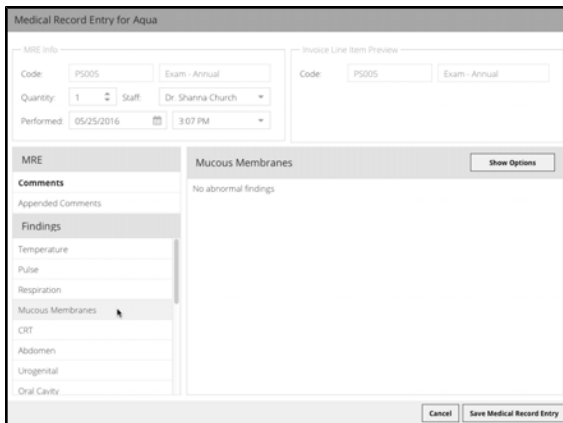
> If the Finding item has associated options, a **Show Options** button will be displayed. Click or tap **Show Options** to see Finding Options.
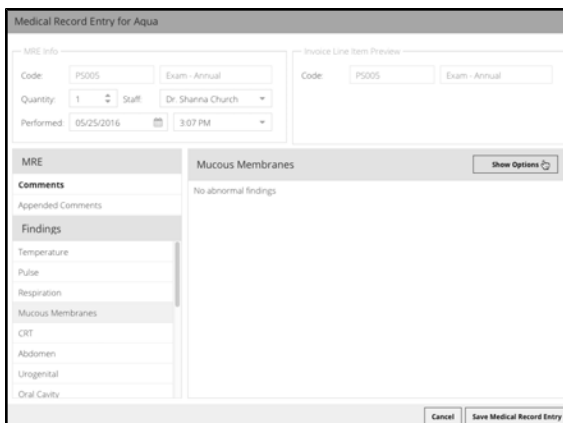
> Select the appropriate Finding Options from the list, then click or tap **Use Selected Options**. Choose **All** if you want to select all options. Choose **None** to deselect any selected options.
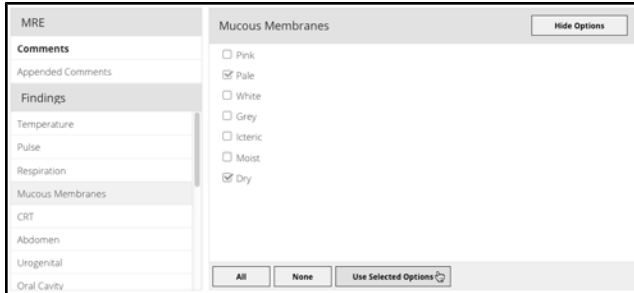
Create and Print Rx Labels in Anywhere

If you add an Rx MRE, the **Prescription Label** dialog will display. Once you complete the Rx label details, choose **OK and Print** to print the prescription label, the same way you do in DVMAX. Note that you must have selected a shared Prescription Label Printer (see the section on **Settings** in this chapter) and DVMAX client must be running on at least one terminal in order to print a prescription label.
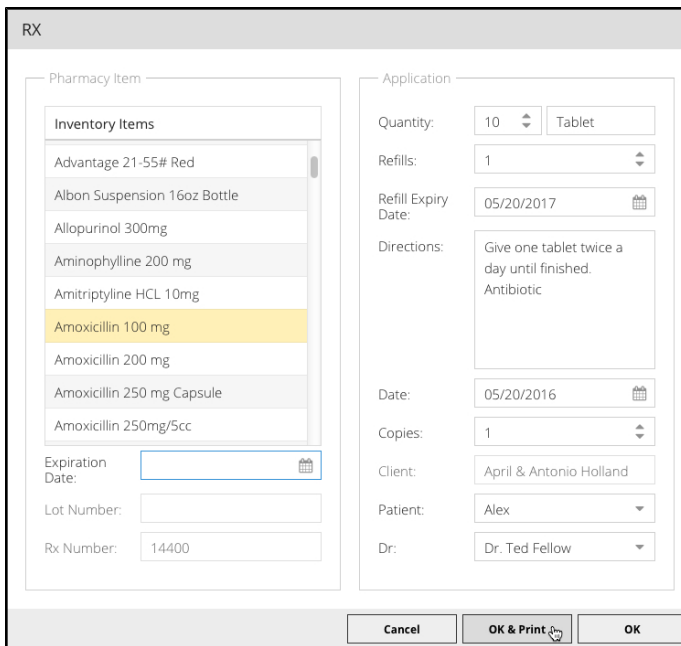
Labs

The **Labs** tab displays a list of all Lab results for the patient. Select a lab result record to view more details. From the lab record, click **Close Lab** to close the record and return to the Labs list.

To Dos

The To Dos tab lets you view or complete pending To Do items for the current patient. As with DVMAX, items are color-coded based on whether they are due now, past due or due on a future date.

Note that To Do items are added in DVMAX by creating Treatment Plans. Refer to the associated section in the DVMAX user guide for more on creating Treatment Plans.

View a To Do

To view a To Do item, click or tap a record. The To Do detail dialog opens.

Complete a To Do

To complete a pending To Do item from the patient record:

Click the **Do** button beside the To Do you want to complete.

-OR-

Double click/tap to open the To Do record.

From the To Do item detail dialog, select the **Completed** checkbox, then click **OK** on the To Do dialog.

A linked MRE dialog will open. Add MRE Findings and Comments as needed and click **Save** to save the MRE.

Requisitions

The **Requisitions** tab lets you review the status of lab and Cubex requisitions, as well as viewing the associated lab result (where applicable). Select a Requisition record to view details.

The Requisition results page has 2 tabs, Requisition and Results.

To view the details of the Requisition, choose the **Requisition** tab (default view). Requisition records are not editable in Anywhere. Choose **Close Requisition** to close the record and return to the Requisitions list.

To view lab result details for completed requisitions, select the **Results** tab. Choose **Close Requisition** to close the record and return to the Requisitions list.

You can create requisitions in Anywhere (by adding an MRC with a linked Requisition Code), but you must be in DVMAX to submit or edit requisitions. For more on working with **Requisitions**, refer to the **Requisitions and Results** chapter in the DVMAX user guide.

Invoices

The **Invoices** tab lets you look for and review both Finished and Unfinished invoices. By default, only Unfinished invoices are listed.

View an Invoice

From the Invoices tab, click or tap to select the invoice record you wish to view.

Edit an Invoice

You cannot add or remove line items on an Invoice from the **Invoices** tab in Anywhere. However, you can make adjustments to the quantity on an invoice. Use the + or – boxes to adjust the quantity up or down for any selected line item.

Qty			Date	Staff	Patient	Code	Description
1	+	-	2012-10-09	Dr. Jonathan ...	Big Tony	Ps106	Exam - Brief
2	+	-	2015-10-27	Dr. Shanna C...	Big Tony	PS065	Exam - Dermatology
1	+	-	2015-11-24	Dr. Shanna C...	Big Tony	DS030	Dental Services Misc.
1	+	-	2016-03-23	Dr. Shanna C...	Big Tony	Rx100	Amoxicillin 100 mg

View Finished Invoices

By default, Anywhere only displays Unfinished invoices on the Invoice list. To view Finished invoices as well, select the **View Finished Invoices** checkbox.

Date	#	Type	Finished?	Notes	Total
2005-10-27	100024	Invoice	Yes	Thank you for choosing our clinic for your health care needs. We appreciate your patience as we adjust to our new computer ...	$82.00
2006-02-20	100148	Invoice	Yes	Thank you for choosing our clinic for your health care needs. We appreciate your patience as we adjust to our new computer ...	$90.00
2011-07-12	100267	Invoice	Yes	Thank you for choosing our clinic for your health care needs. We appreciate your patience as we adjust to our new computer ...	$56.00
2011-07-19	100454	Invoice	Yes	Thank you for choosing our clinic for your health care needs. We appreciate your patience as we adjust to our new computer ...	$25.00
2012-08-23	100604	Invoice	Yes	Thank you for choosing our clinic for your health care needs. We appreciate your patience as we adjust to our new computer ...	$392.40
2015-07-03	101163	Invoice	Yes	Thank you for choosing our clinic for your health care needs. We appreciate your patience as we adjust to our new computer ...	$75.00
2015-11-18	101270	Invoice	No	Thank you for choosing our clinic for your health care needs. We appreciate your patience as we adjust to our new computer ...	$93.00
2015-10-21	101353	Invoice	No	Thank you for choosing our clinic for your health care needs. We appreciate your patience as we adjust to our new computer ...	$25.00
2016-03-29	101648	Invoice	No	Thank you for choosing our clinic for your health care needs. We appreciate your patience as we adjust to our new computer ...	$45.00
2016-05-24	101659	Invoice	Yes		$10.00
2001-10-11	19216	Invoice	Yes	NOTE Your pet has received a Feline Leukemia booster vaccination today. You will be notified by mail of the appropriate times...	$155.15

Filter

Include Finished Invoices

Attachments

You can view documents and images attached to the patient record from the **Attachments** tab, just as you can in DVMAX. In addition, all consent forms or other documents that have been presented for electronic signature and submitted (see **WP Documents**) are added to the **Attachments** tab of the patient record.

To view an attachment:

> Click/tap the record you want to view.

> The Attachment record opens.

> Click **View Attachment**.

For more on working with attachments, see the associated section in the **Patients** chapter of the DVMAX user guide.

WP Documents

The **WP (Documents)** tab in Anywhere lets you view a patient's Protected and Case documents. These documents cannot be edited in Anywhere, but you can convert Protected documents to Case documents, and all Case documents can be presented for electronic signature.

The WP tab is divided into 2 main sections, the document list (Case and Protected) areas and the document preview area. The Case Documents list is on the top left part of the screen, while the Protected Documents list is on the lower left part of the screen. When you click/tap to select a document, the contents of the document are shown in the document preview area on the right side of the screen.
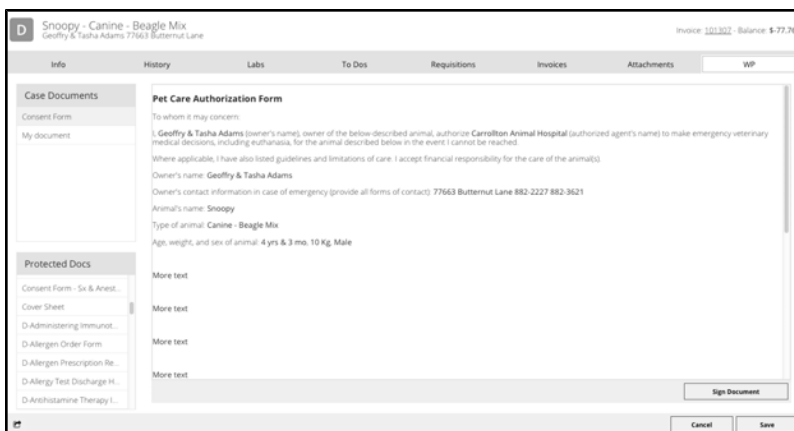
Convert a Protected Document to a Case Document

To convert a Protected document to a Case document (so that it can be signed):

> From the Protected Documents list, click or tap to select the document you want to convert.

> Click **Convert Protected Document**.

The converted document will appear in the Case document list.

Sign a Consent Form or Document

Anywhere lets you present any Case document for electronic signature. Only Case documents can be signed. If you do not see the document you need signed in the Case list, you may need to convert a Protected document to a Case document first. See **Convert a Protected Document to a Case Document**.

To present a document for signature:

> From the list of Case documents, select the form or document you would like to have signed.
>
> When you select the document, the contents will display in the preview area on the right side of the screen.
>
> Click Sign Document. A signature capture area opens at the bottom of the preview pane.
>
> Sign the document using the mouse (desktop) or stylus (for touch devices, like a tablet).
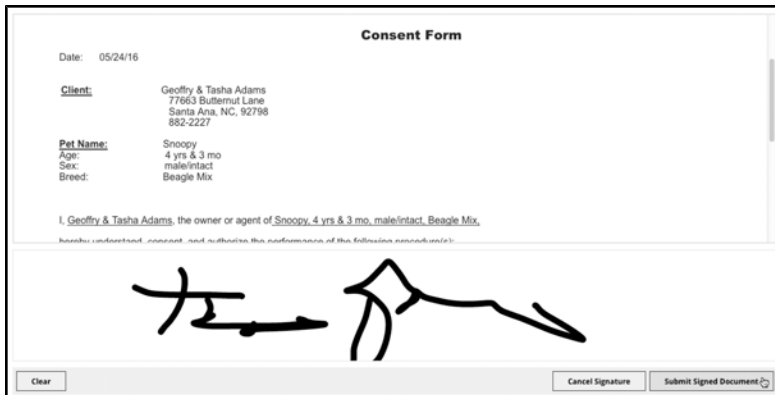

> Click **Submit Document** to create a PDF of the document. The PDF opens in a new window. You can choose to print the document or simply close the window. The signed document will be added to the **Attachments** tab of the patient record.

For more on working with WP documents, see the **Patients** chapter and **Word Processing** chapter of the DVMAX user guide.

To Dos Menu (Desktop Only)

The To Do menu option is only available when working in desktop mode. To work with To Dos in tablet mode, use the Whiteboard feature.
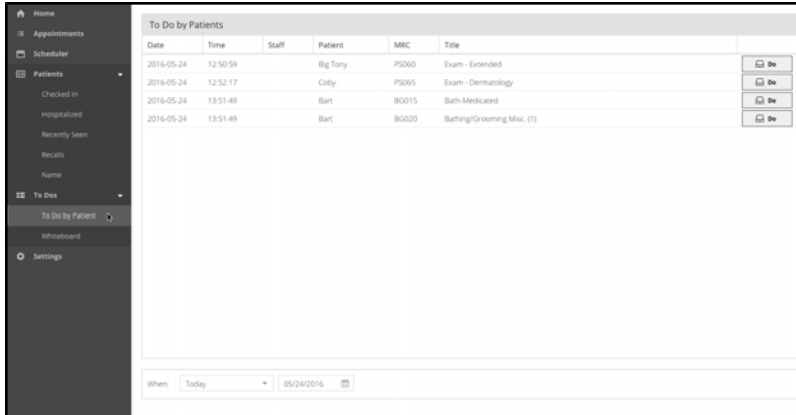
Note that To Do items are added in DVMAX by creating Treatment Plans. Refer to the associated section in the DVMAX user guide for more on creating Treatment Plans.

Search for To Do Items

To search To Do items from the To Do list:

> Choose an option from the drop down menu – Today, Yesterday or Tomorrow

-OR-

> Select a date from the calendar field to see all To Dos due from the selected date forward. For example, if you choose a date seven days in the past, you will see all To Dos from that date forward, including To Dos items due on a future date.

View a To Do

To view a To Do item:

Double click on the item you want to view on the list.

The To Do dialog opens.

You can complete the To Do, add notes or close the To Do record.

Complete a To Do

Completing a To Do item creates an MRE and removes the To Do from the list. To complete a pending To Do item from the To Do list:

Click the **Do** button beside To Do item you want to complete.

-OR-

Double click to open the To Do record.

From the To Do item detail dialog, select the **Completed** checkbox, then click **OK** on the To Do dialog.

A linked MRE dialog will open. Add MRE Findings and Comments as needed and click **Save** to save the MRE.

Once the MRE is saved, Anywhere will return you to the To Do list.

About the Whiteboard

The Whiteboard gives you a view of the To Do activities for a single day. The default view is the current date. Green blocks on the Whiteboard blocks represent pending To Do items. Completed Whiteboard items are shown as grey blocks.
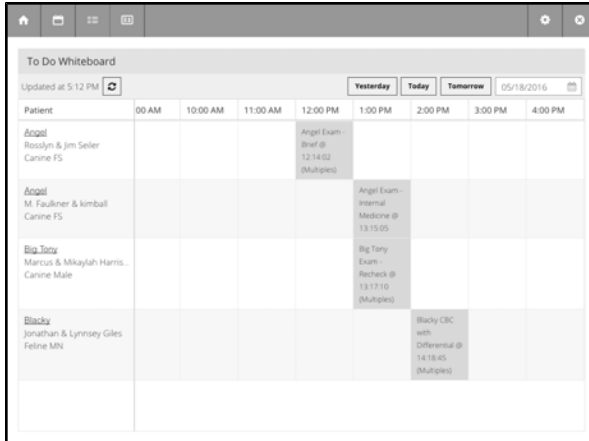
You can complete to do items and/or go to patient records from the Whiteboard. Completing a To Do item from the Whiteboard creates an MRE.

Choosing a Date From the Whiteboard

The Whiteboard shows To Dos for the current date by default. To adjust the date for the Whiteboard, select the **Today**, **Yesterday** or **Tomorrow** buttons, or specify a date by picking a date from the calendar field.

View a Patient Record from the Whiteboard

From the **Patient** column on the Whiteboard, click on a patient name. This will open the patient record.
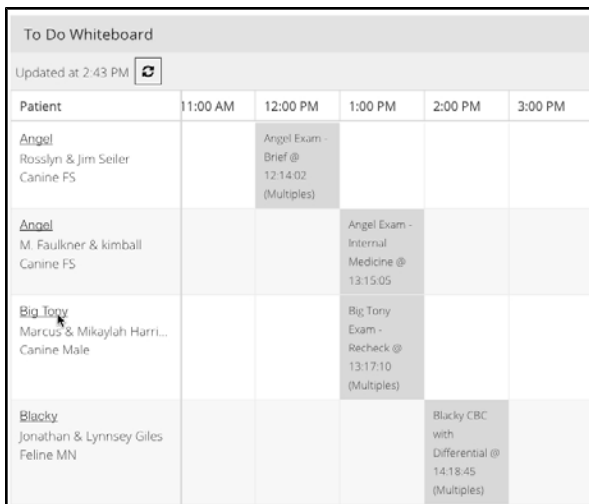
You can work with the record as you like, including going to the To Do tab of the patient record to view or complete any To Dos associated with the record. When you close the patient record, you will be returned to the Whiteboard.

View To Dos from the Whiteboard

All To Do items are represented by colored blocks on the Whiteboard grid. Some blocks represent single To Do items, while others represent multiple To Do items due at the same time. To view a To Do item from the Whiteboard:

Double click or tap on the Whiteboard item you want to view.

If the block you select represents a single To Do item, a To Do item record will open.
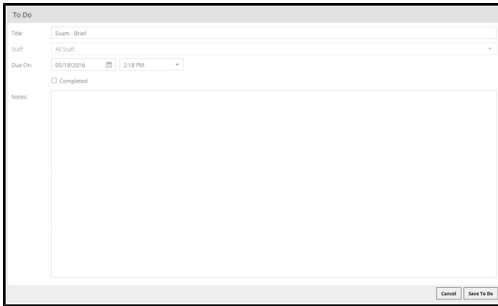
If the block you select represents multiple To Do items ("Multiples"), a list of the To Dos will display. Select an individual item from the list to view the To Do item details.

Multiple To Dos on the Whiteboard

If there are multiple To Do items associated with a block on the Whiteboard, the item will say "Multiples" at the bottom of the block. Double click on the block to view all of the To Do items associated with the block. Select a To Do from the list to view or complete.