Release Notes DVMAX version 8.7

These release notes describe added features, enhancements to existing functionality and bug fixes delivered as DVMAX 8.7.

New Features

rVetLink Integration

rVetLink provides automated communication between specialty clinics and referring veterinarians. With rVetLink - DVMAX integration, you can automatically create client and patient records from rVetLink referrals and you can control what you share with referring clinics directly from DVMAX – appointments, MREs, diagnoses and more. To use this feature, you will need to have an rVetLink account set up, then work with an rVetLink onboarding specialist to configure rVetLink integration.

An rVetLink referral export report added to custom reports. Running the report displays a list of referral sources and related information on screen that can then be copy/pasted and sent to rVetLink to aid in the onboarding process.

DVMAX Messenger – Internal Message Board

DVMAX 8.7 includes an internal message board that lets you send messages to one or more DVMAX staff. The message board feature is accessed from the new Messages icon on the Command Palette and it opens in a browser window in the same way as the Scheduler and Boarding facilities. You can send a basic message or a task-based message, and you can include a link to a client or patient record with your message. Task-based messages can be marked as completed. Pending message notifications are shown on the Messages dialog.

IDEXX Web PACS integration

DVMAX version 8.7 brings IDEXX Web PACS integration to the suite of automated requisition features. You can now seamlessly send diagnostic imaging requests directly from DVMAX when you create an MRE with a linked requisition code. View images from the History tab of the patient record with the click of a button.

Departments

DVMAX uses Department records to identify the various service and/or product divisions in the practice and make them available for associating with recalls, staff and invoice line items. Some report updates have been made to include breakdown by Department, like the End of Day Transaction report, Recalls by Department and Sales Tax Charged Out.

By default, DVMAX has only one Department record, Clinic Name, and this record is used anywhere Departments are employed. To take full advantage of the Departments feature, you will

need to create Department records, then assign Departments to Staff records, as desired.

Split Ownership Functionality Enhancements

- Based on customer requests, there have been a number of enhancements to functionality to allow for better management of transactions involving split-owned patients. Some examples include:

- For split-owned patients, when ownership changes, previously finished invoices in the billing cycle are not affected. This follows enhancements made to split-ownership functionality to address an issue where, when changing ownership for split ownership patients, the previous owner's billing statement could be changed if the user did not print a billing statement before changing ownership.

- The new Department features have also been added to split-owned invoicing.

- Functionality has been added to permit editing of split-owned invoices.

- It is now possible to issue returns for split-owned invoices.

- Fixed an issue where a previous owner could still be listed as an owner on an invoice.

Other Enhancements

- The Requisition Wizard has been renamed as the Integrations Wizard to more accurately reflect enhanced functionality.

- An Items Sold Detail report has been added, a report that gathers financial data and formats it for export as a CSV file type.

- For lab-related MREs, the MRE now displays the type of lab result (urine/blood) and the lab instrument name in the record.

- DVMAX lets you print Pet Detect Collar media using pre-built templates. Pet Detect driver instructions, media setup and installation of 4D Write templates required. A knowledgebase document with links to the templates is located at https://dvmaxkb.atlassian.net/wiki/spaces/DP/pages/53215233/Using+Pet+Detect+in+DVMAX. Contact Tech Support with any questions.

- Custom Revenue Projection Report has been improved to allow better user control over the number of items on which to report. This behavior is controlled by an advanced setting, which defaults to 200, but can be set by the user to a lower value when running the report.

- Changed custom Boarding report to include a date range search rather than a single date.

- Sales Tax Charged Out report now includes Departments.

- Added a new PMP Report, a specially-formatted report for monitoring dispensed controlled drugs within a state.

- Added advanced setting to control scheduler cache warming. Can now turn scheduler cache warming off, which will improve DVMAX performance speed in SU/RP environment.

- New feature to specify when a "call home" to dashboard is run. This is in response to cus-

tomer feedback at some sites using RP, where DVMAX may be slow on startup. DVMAX now checks the license and if remote processing is part of the license, it will not run the call home when running SU.

- Added new functionality to allow estimates to retain the state they held when originally created. When an estimate is modified, the original estimate remains and a new version of the estimate is created and saved. All versions of the estimate are available to be viewed.

- New Trainer and Stable functionality has been added. If there is no Trainer or Stable information, the corresponding button will display the pick list. If there is Trainer or Stable information, the Trainer or Stable floating window displays.

- New functionality added to address an issue where patient could be marked as deceased but still appear as active. This was the result of a record locking behavior, where patient status could not be updated and saved when the patent record was locked by another user. With the new behavior, an alert is displayed that the patient record is locked, the status cannot be set and the user needs to correct status manually. This behavior is controlled by an advanced setting. Text of the alert can be customized via advanced setting as well. The alert appears in the Command Palette.

- A Referral field has been added to the client online registration form.

- Appointment by Staff Report now includes Appointment Duration option.

- To more accurately reflect that current label printing functionality also supports network printers, the Label Printer Setup dialog now says "This station has an attached label printer or prints to a Zebra network printer".

- Added security/permission controls to reporting. Access to reports (custom and standard reports) can now be controlled on a user-by-user basis for every report. Assistance from Technical Support is needed to configure this feature.

- The square bracket and braces (squiggly bracket) characters are no longer permitted the Create New Appointment dialog when adding appointment details. Those characters can cause an issue that prevents the appointment from being saved to the Scheduler. Further, if the Client record contains a square bracket or braces in the client name or phone fields, this can cause the same issue when trying to add an appointment for that client to the Scheduler. Do not use those characters when working with the Client General Information page of the Client record.

- The Options area of the Macro Translator window has been significantly enlarged to accommodate more text for longer option items.

- A Reminders area has been added to the Create/Edit Appointment dialog. If there are existing reminders for the patient, these are listed in the Reminders area.

- Users requested the ability to add more information to Health and Vaccine forms while keeping the form to a single page. Health Certificates and Vaccine Certificates now have room for approximately 12-14 rows of information under the Vaccine list area. If a user has more than 12-14 rows that they feel MUST be on a certificate, they should consider using a custom WP document, Text View, or re-assess what they have listed as reminders that should print on certificates. There is only so much real estate available on a single page. Additionally, if

users want to keep the health certificate to a single page, they will have to limit notes to 468 characters (including spaces) and not use hard returns in notes area (unless they want to quickly use up space).

Bug Fixes

- Resolved an issue where copy/pasting an MRE resulted in a duplicate key error.

- Resolved an issue that could prevent copy/paste of diagnosis record.

- Addressed an issue where the Scheduler could fail to refresh if the mouse was active during the refresh interval.

- Fixed an issue that could cause the link to break between bill item records and provider codes.

- Fixed a VetConnect PLUS issue where the IDEXX Requisition Wizard would post a runtime error if no LIMS code was supplied while Updating Codes.

- Fixed an import routine issue with IDEXX Requisition codes where a second list of codes could be imported. Only one set of codes is now imported.

- Fixed an issue that could cause an error message when notes were added to an IDEXX Reference Lab requisition when submitted.

- Addressed an issue that could cause hidden MREs to show in patient history in DVMAX Anywhere. Hidden MREs are now properly masked from view in History in both DVMAX and Anywhere.

- Addressed an issue where Macros would insert html tags into a WP document when characters < or & were part of the text of a Finding Option.

- Fixed an issue where user could bypass entering of initials when deleting an unfinished invoice. If initials are required to finish or modify an invoice, an unfinished invoice cannot be deleted without providing valid provider initials. Similarly, an issue has been addressed where voiding an invoice or payment could still be done without entering a valid staff code.

- Fixed a number of cosmetic issues that resulted in text appearing sliced or cut off on some reports and other print jobs from record lists.

- Resolved an issue where attempting to open a treatment plan that is already locked by another user caused the items to duplicate.

- Addressed an issue where, when printing the Sales Tax Collected Report, values would show as $0. This was on the printed report only. Printed values now display correctly.

- Fixed an issue that could cause Inventory Quantity on Hand to change when changing the view under Sales Information from Purchasing Units to Dispensing Unit.

- Fixed an issue that could prevent the export of the Appointments by Staff report.

- Fixed an issue that caused text on Antech requisition forms to be cut off.

- Fixed an issue where the Species Code under Integration Wizard would be locked if a patient record of that species was open.

- Fixed an issue where new Inventory Purchase line items seem to "hide" when you need to use scrolling on the dialog.

- Addressed an issue where word processing crashes when highlighting a sentence and dragging it to move (Mac only).

- Addressed an issue that could see some transaction types reversing the +/- value of the amount of charge put in the "Add New Transaction" dialog.

- Fixed an issue with listbox on Inventory Item -> Pharmacy Details Listing area that made selecting a Lot entry to edit from the list impossible.

- Addressed an issue that might prevent viewing of attachments from MRE attachments tab.

- Addressed an issue where keyboard shortcuts were not available when opening a patient record that contained VCPlus or in house lab results. A web form was grabbing system focus even though the process was hidden.

- There was a problem with the date format in the new Reminders area of the Create/Edit Appointments dialog. This has been fixed by correcting an issue where settings in DVMAX were not being correctly sent to the Scheduler. The Advanced Setting px.sched.dateFormat must be set to m/d/Y to make the date format in the Scheduler consistent with the rest of DVMAX (mm/dd/yyyy).

- Fixed an issue that could cause an error message to display when running the Multi-Site Detailed Doctor Production Report.