

Macros

Macros save you time and typing by allowing you to specify abbreviations for words or phrases. When you type the abbreviation in a text or word processing area, DVMAX will automatically replace it with the full word or phrase.

In addition, Macros themselves can include placeholder tags that serve as points you can jump to and select text from a list of choices. Macros are defined and controlled through the **Patient Codes** section of DVMAX.

Macros must start with "\" (without the quotation marks) when being used. This applies only when you are typing them in a text or word processing area. The "\" is not entered when adding new macros in Patient Codes.

Where You Can Use Macros

You can use a macro in the following areas of DVMAX:

- The Client record **Word Processing** area.
- The Patient record **Word Processing** area.
- Diagnosis Comments on a patient record.
- MRE comments on a patient's **History**.
- The **Notes** tab of a patient record.

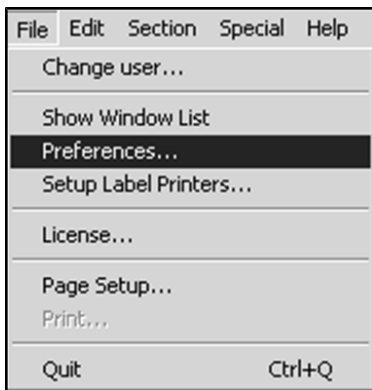
Enabling and Disabling Macros

In order for Macros to work in DVMAX, they must be enabled. If Macros are not enabled, no substitution will occur even if Macros are defined.

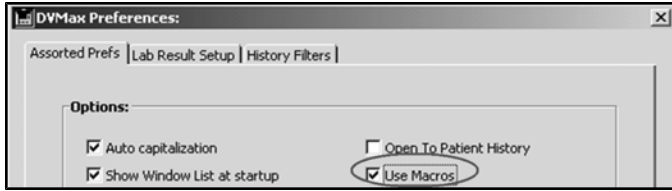
Enabling Macros

Macros can be enabled in two places in DVMAX. To enable Macros:

- Choose **Preferences** from the **File** menu.



- Click to select the **Use Macros** checkbox.



- Click **OK**.

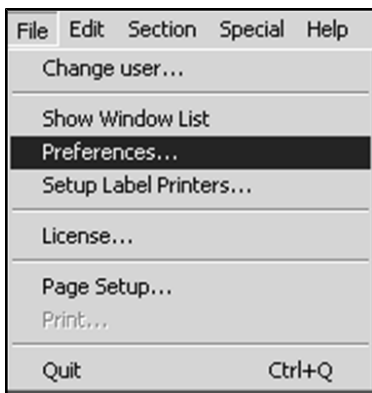
-OR-

- Select **System Constants** from the **Section** menu.
- Select the **User Settings** tab.
- Under **Misc** select the **Use Macros** check box.
- Click **OK**.

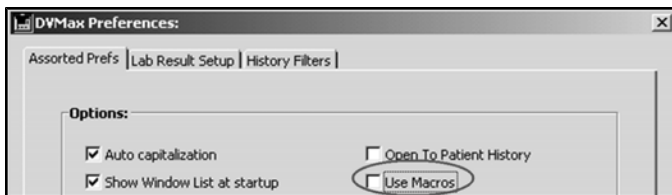
Disabling Macros

To disable Macros in DVMAX:

- Choose **Preferences** from the **File** menu.



- Click to deselect the **Use Macros** checkbox.



- Click **OK**.

How to Use a Simple Macro

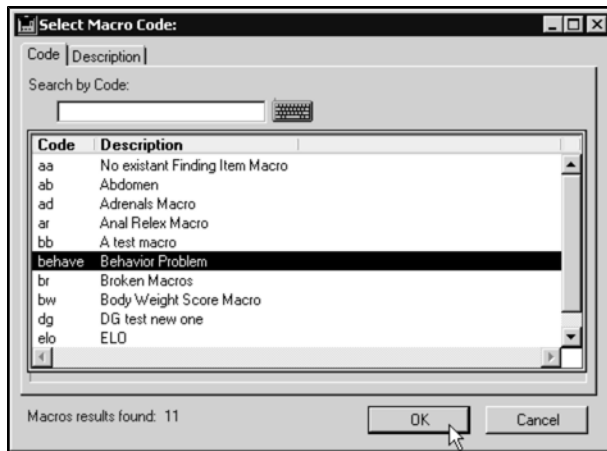
To use a Macro, it must first be defined in Patient Codes (see **Setting Up Macros**). To use a Macro that has already been defined, simply type the character “\”, then the macro text itself, then a space.

For example, if in Patient Codes you have specified that the Macro “behave” expand to “Behavior Problem”, then to insert the text “Behavior Problem” into a word processing or text area you would simply type “\behave “ (without the quotation marks).

The Macro Pick List

If you cannot remember an exact Macro code:

- Type “\” and as much of the code as you remember.
- If there is only one macro that starts with the code you typed, DVMAX will insert it automatically.
- If there is more than one macro that starts with the code you typed, DVMAX will present a list of matching macros to choose from.

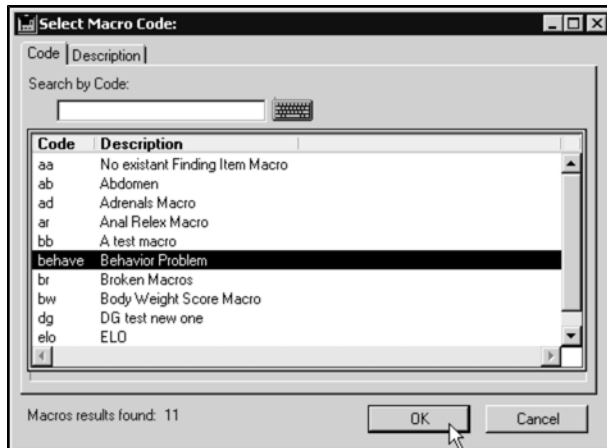


- Double-click a Macro from the list to choose it, or click **Cancel** to choose none.

Listing All Macros

To list all available Macros:

- Type “\” and a space into a word-processing or text area that utilizes Macros. DVMAX will present a list of all macros to choose from.



- Double-click a Macro from the list to choose it, or click **Cancel** to choose none.

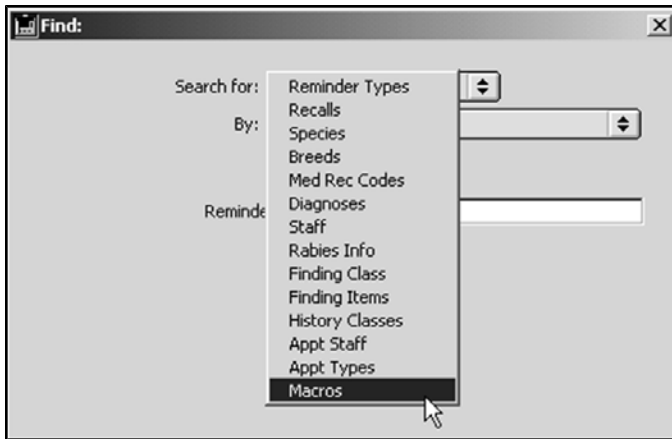
Defining a Simple Macro

Macros are defined in Patient Codes. To define a Macro in DVMAX:

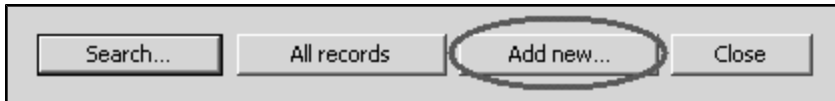
- Choose **Patient Codes** from the **Section** menu.

Section	Special	Help
Clients & Patients		Ctrl+1
Inventory Management		Ctrl+3
Patient Codes		Ctrl+4
System Constants		Ctrl+5
General Management		Ctrl+6
Log Records		Ctrl+7
Boarding		Ctrl+8
Treatment Plans		Ctrl+9
Reminders		

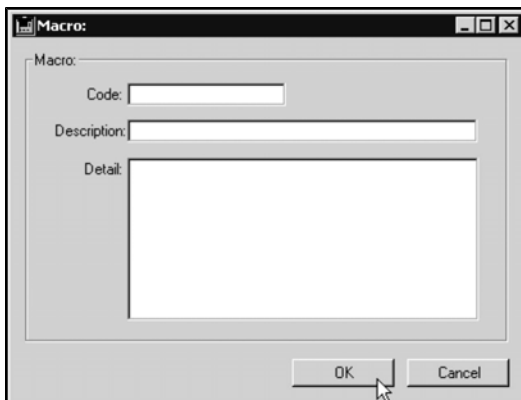
- From the **Find Dialog**, choose **Macros** from the **Search For** drop-down list.




- Click **Add New** at the bottom of the **Find dialog**.



- A new, blank **Macro** window displays.



- Type the short code for this Macro into the **Code** field. This code is the abbreviation you will type to invoke this Macro in a text area.

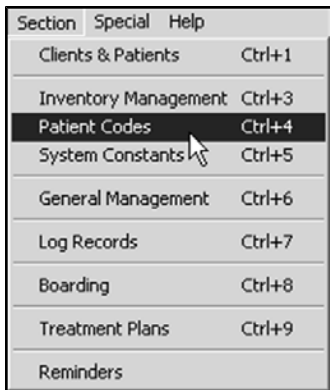
 Do not start the code with “\”. The slash character is used only in word processing or text areas, not in Macro definitions.

- Type a description of this Macro in the **Description** field. The description is for display only in the Macros list in Patient Codes and in the Pick List for selecting Macro codes.
- Type the full text you would like to replace the Macro code with when it is invoked into the **Detail** field.
- Click **OK** to save the Macro.

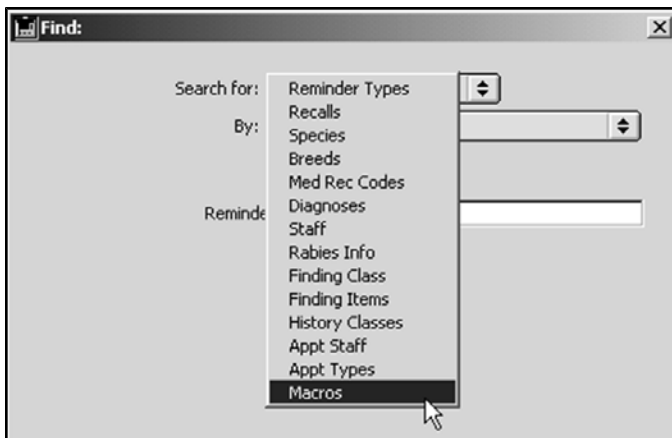
Search for Macro Records

To find a Macro in DVMAX:

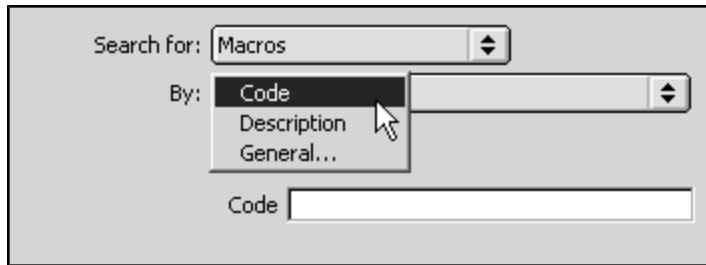
- Choose **Patient Codes** from the **Section** menu.



- From the **Find** dialog choose **Macros** from the **Search For** drop down list.

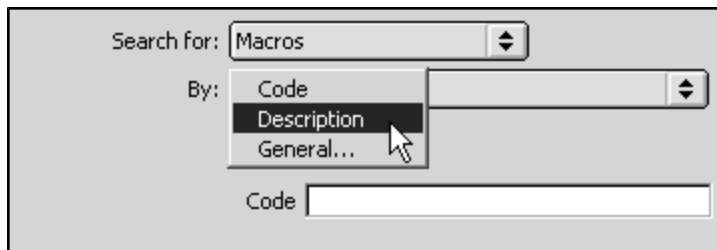


- To search for a Macro by code, choose **Code** from the **By** drop-down list.



- OR -

- To search for a Macro by a keyword in its description, choose **Keyword** from the **By** drop-down list.



! The Description search is a leading character search; it will match those Macros whose description starts with the characters you type. For example, a keyword search for “Pharmacy” will match “Pharmacy Item” but not “Item in Pharmacy”.

i You can use the “@” wildcard operator in both Code and Keyword Macros searches. For example, a search for “Abd@” will find Macro codes “AbdominalExploratory” and “Abdomen”.

- Click **Search**. If more than one Macro matches your search criteria, DVMAX will show you a list from which you can choose. If only one Macro matches your criteria, that Macro record will be opened.

i To get a list of all Macros currently defined in DVMAX, click **All Records** instead of **Search**, or leave the search criteria empty and click **Search**.

Printing Macros

You can print macros with finding options expanded. Select a macro from the Macros window, and from the DVMAX **File** menu, select **Print**. Follow the directions in your print dialog, and the macro will be printed with finding options expanded, if any.

To print all macros with finding options expanded, make certain no records are highlighted in the Macros window. Then from the DVMAX **File** menu, select **Print**. Follow the printer prompts. All macros are printed.

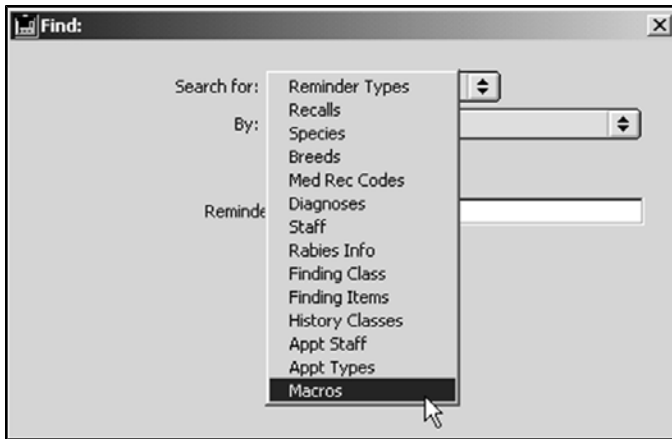
Edit a Macro Record

To edit an existing Macro:

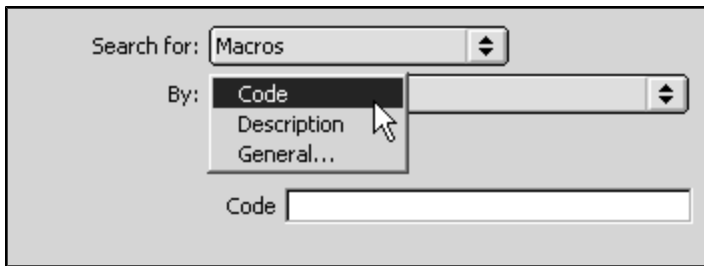
- Choose **Patient Codes** from the **Section** menu.

Section	Special	Help
Clients & Patients		Ctrl+1
Inventory Management		Ctrl+3
Patient Codes		Ctrl+4
System Constants		Ctrl+5
General Management		Ctrl+6
Log Records		Ctrl+7
Boarding		Ctrl+8
Treatment Plans		Ctrl+9
Reminders		

- From the **Find Dialog** choose **Macros** from the **Search For** drop-down list.

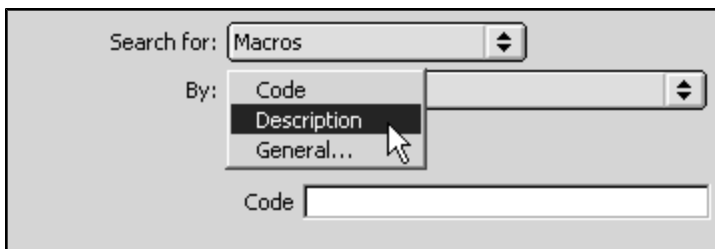


- To search for a Macro by code, choose **Code** from the **By** drop-down list.



- OR -

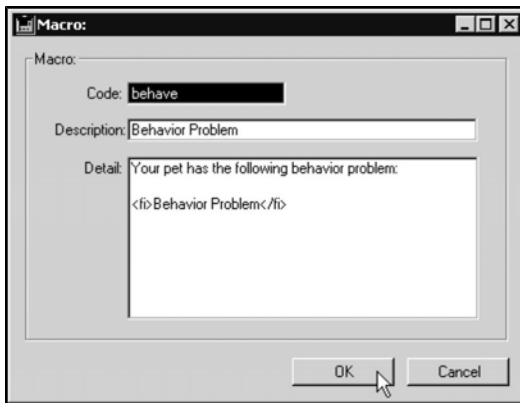
- To search for a Macro by description, choose **Description** from the **By** drop-down list.



! The **Description** search is a leading character search; it will match those Macros whose description starts with the characters you type. For example, a keyword search for “Pharmacy” will match “Pharmacy Item” but not “Item in Pharmacy”.

i You can use the “@” wildcard operator in both **Code** and **Description** Macro searches. For example, a search for “Abd@” will find Macro codes “AbdominalExploratory” and “Abdomen”.

- The **Macro** window displays.

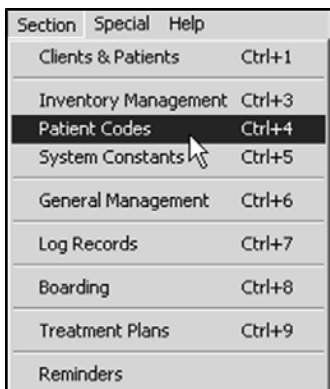


- Edit the **Code**, **Description** and **Detail** boxes as desired. Explanations of the purposes of each box can be found in **Defining a Simple Macro**.
- Click **OK** on the Macro window to save your changes.

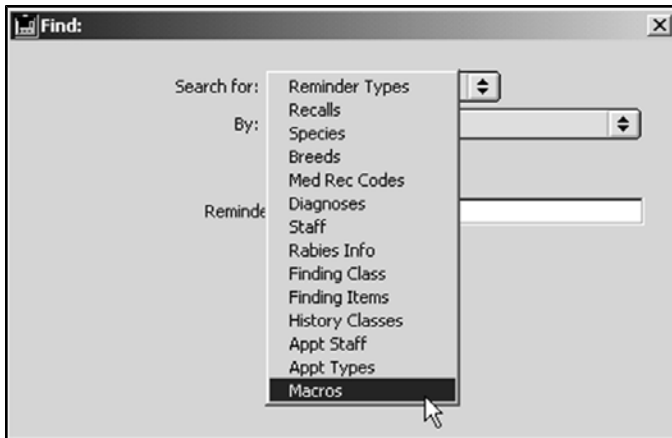
Delete a Macro Record

To delete a Macro from DVMAX:

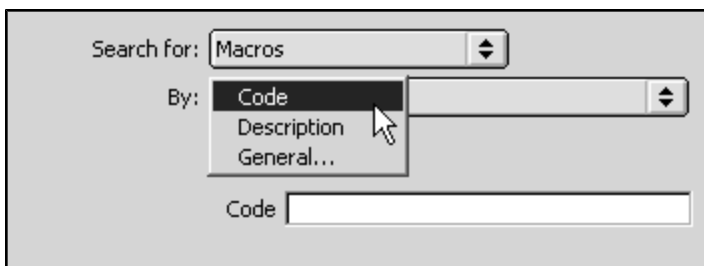
- Choose **Patient Codes** from the **Section** menu.



- From the **Find Dialog** choose **Macros** from the **Search For** drop-down list.

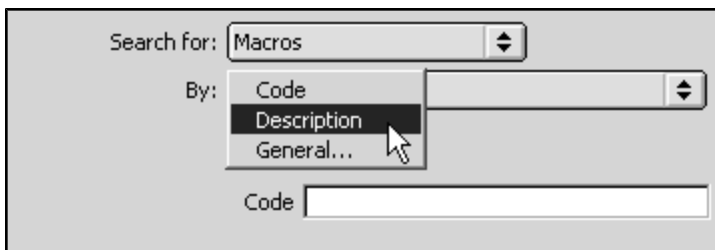


- To search for a Macro by code, choose **Code** from the **By** drop-down list.



- OR -

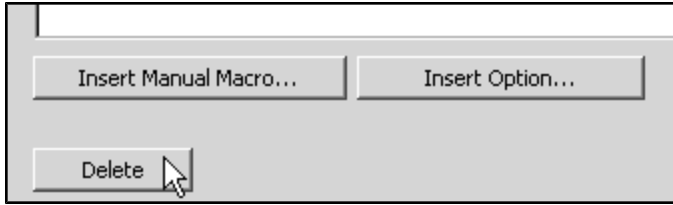
- To search for a Macro by description, choose **Description** from the **By** drop-down list.



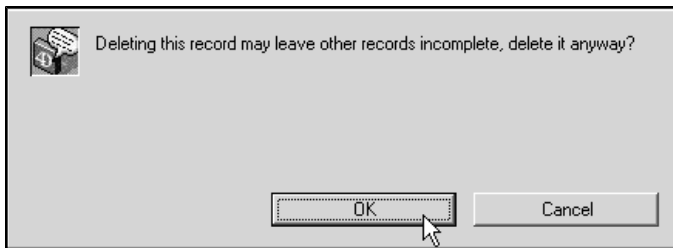
! The **Description** search is a leading character search; it will match those Macros whose description starts with the characters you type. For example, a keyword search for “Pharmacy” will match “Pharmacy Item” but not “Item in Pharmacy”.

i You can use the “@” wildcard operator in both **Code** and **Description** Macro searches. For example, a search for “Abd@” will find Macro codes “AbdominalExploratory” and “Abdomen”.

- Click the **Delete** button near the lower-left hand corner of the Macro definition window.



- DVMAX will ask you to confirm that you wish to delete this Macro.



- Click **OK** on both dialogs. The Macro is deleted from the list and can no longer be used in DVMAX.

Finding Items and Macros

Macros can be linked to Finding Items. This allows you to choose from a list of predefined Finding Item options at the time you use the Macro. This powerful feature means you can be more accurate, with less typing.

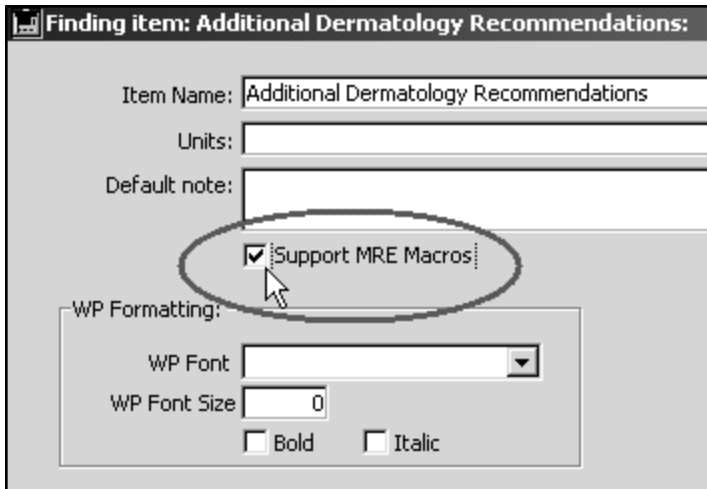
For information on Advanced Settings that affect findings in macros, refer to the chapter **Advanced Settings** in this document.

Making Finding Items Available to Macros

You must explicitly make a Finding Item available for use in a Macro. You must do this from the Finding Item screen.

To make a Finding Item's options available to a Macro:

- Click to select the **Support MRE Macros** checkbox on the **Finding Item** screen.



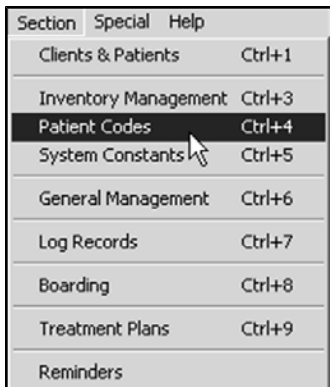
Defining a Macro Containing a Finding Item

The process of defining a Macro that contains a Finding Item is almost identical to that outlined in **Defining a Simple Macro**, with the addition of a single step.

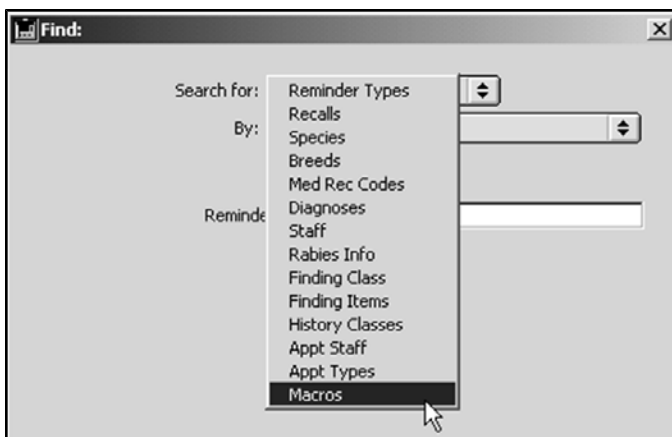
You can include multiple Finding Items in a single Macro.

To include a Finding Item in a Macro:

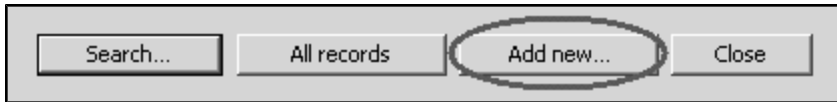
- Choose **Patient Codes** from the **Section** menu.



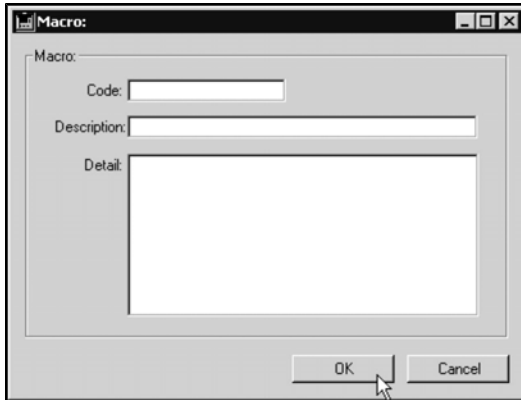
- From the **Find** dialog choose **Macros** from the **Search For** drop down list.




- Click **Add New**.



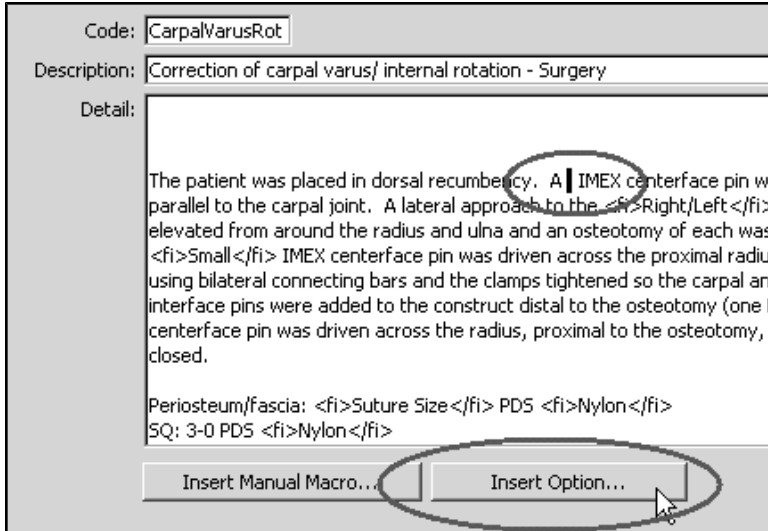
- A new, blank **Macro** record window opens.



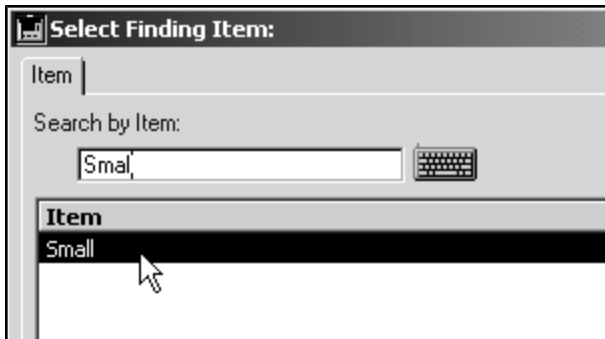
- Type the short code for this Macro into the **Code** field. This code is the abbreviation you will type to invoke this Macro in a text area.

 Do not start the code with “\”. The slash character is used only in word processing or text areas, not in Macro definitions.

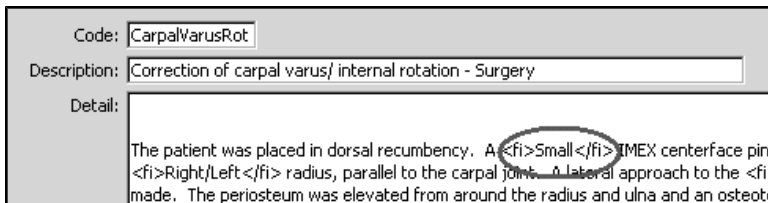
- Type a description of this Macro in the **Description** field. The description is displayed only in the Macros list in Patient Codes and in the Pick List for selecting Macro codes.
- Type the full text you would like to replace the Macro code with when it is invoked into the large **Detail** field.
- To include a Finding Item in the full Detail text, first position the insertion point where you would like to Finding Item to appear. Then click the **Insert Option** button.



- The **Select Finding Item** dialog displays.



- Search for the item you wish to insert then click it to select it.
- Click **OK**. The option tag will appear in the **Macro Detail** field.



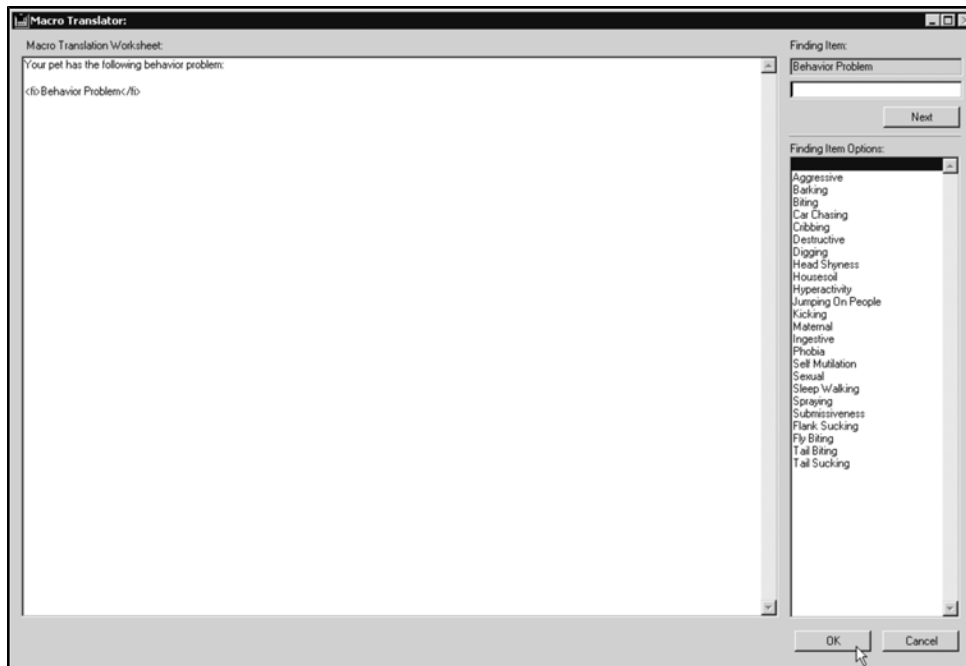
- Click **OK** to save the Macro.

Using a Macro that Includes a Finding Item

You invoke a Macro that includes a Finding Item in the same manner and locations as you invoke one that doesn't. See **How to Use a Simple Macro** and **Where You Can Use Macros** for more information.

The Macro Translator Window

When you invoke a Macro that uses a Finding Item, DVMAX will present you with the **Macro Translator** window.



The Macro Translator window allows you to choose which of a Finding Item's options to include as part of the Macro expansion. To use the Macro Translator window:

- Click to select the **Finding Item Option** you wish to use from the list on the left. The Finding Item Option is inserted into the Macro text.
- If necessary, click the **Next** button to move to the next Finding Item option in the Macro.
- Click **OK** to save your choice(s). DVMAX returns you to the text or word processing area from which you invoked the Macro.

i If there is only one Finding Item in your Macro, selecting that Item's option will return you immediately to the text or word processing area from which you invoked the Macro.

Manual Macros

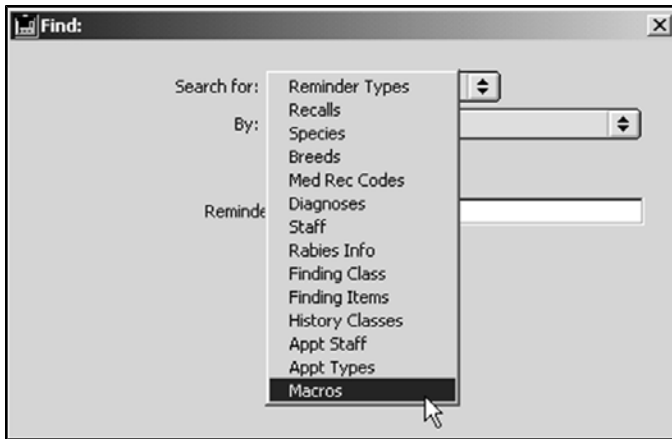
Manual Macros allow you to choose from a list of predefined options when you insert a Macro, allowing you to be more accurate, with less typing. You can include multiple Manual Macros in a single Macro.

To set up a Manual Macro:

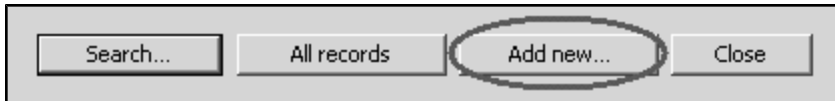
- Choose **Patient Codes** from the **Section** menu.

Section	Special	Help
Clients & Patients		Ctrl+1
Inventory Management		Ctrl+3
Patient Codes		Ctrl+4
System Constants		Ctrl+5
General Management		Ctrl+6
Log Records		Ctrl+7
Boarding		Ctrl+8
Treatment Plans		Ctrl+9
Reminders		

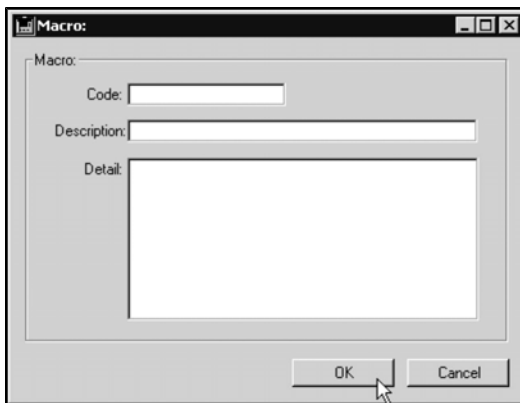
- From the **Find Dialog** choose **Macros** from the **Search For** drop-down list.




- Click **Add New**.



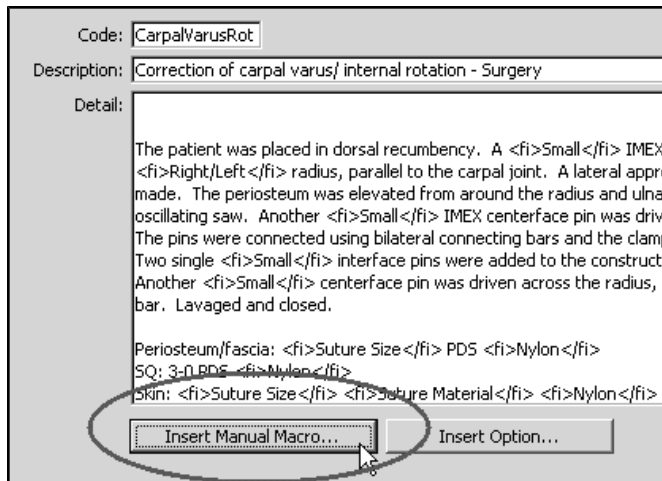
- Click the **Add** button beneath the list of existing Macros. The **Macro** window appears.



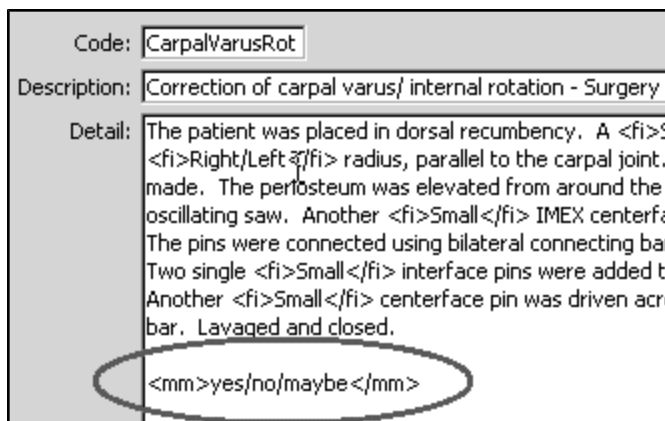
- Type the short code for this Macro into the **Code** field. This code is the abbreviation you will type to invoke this Macro in a text area.

 Do not start the code with “\”. The slash character is used only in word processing or text areas, not in Macro definitions.

- Type a description of this Macro in the **Description** field. The description is displayed only in the Macros list in Patient Codes and in the Pick List for selecting Macro codes.
- If necessary, type the full text you would like to replace the Macro code with when it is invoked into the large **Detail** field.
- To include a selectable item in the full text, first position the insertion point where you would like to Finding Item to appear. Click the **Insert Manual Macro** button.



- DVMAX will insert `<mm>yes/no/maybe</mm>` into the **Detail** box. This default tag contains three choices that will appear when you insert this Macro into a word processing document: “yes”, “no”, and “maybe”.



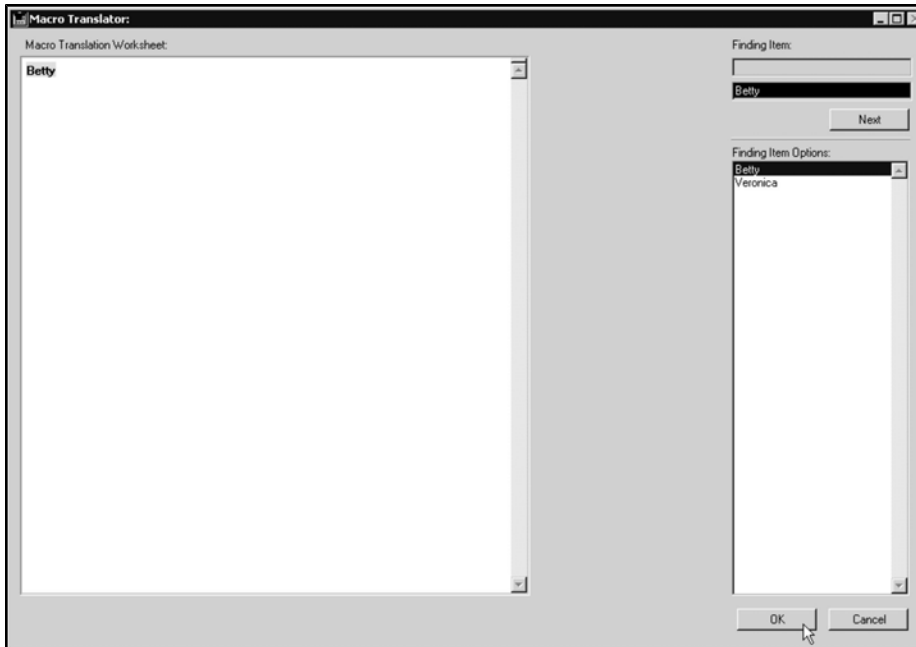
- Edit the default tag as necessary, replacing the 3 default tags with your choice of words and or sentences. Your choices must be separated by the “\” character and cannot contain the “\” character.
- Click **OK** to save the Macro.

Using a Manual Macro

You invoke a Manual Macro in the same manner and locations as you invoke one that doesn't. See **How to Use a Simple Macro** and **Where You Can Use Macros** for more information.

The Macro Translator Window

When you invoke a Manual Macro, DVMAX will present you with the Macro Translator window:



The Macro Translator window allows you to choose which of a Manual Macro's predefined options to include as part of the Macro expansion. To use the Macro Translator window:

- Click to select the option you wish to use from the list on the left. The option is inserted into the Macro text.
- If necessary, click the **Next** button to move to the next Finding Item option in the Macro.
- Click **OK** to save your choice(s). DVMAX returns you to the text or word processing area from which you invoked the Macro.

i If there is only one option in your Macro, selecting that option will return you immediately to the text or word processing area from which you invoked the Macro.

Practice Management Financials

There are a number of practice management financial activity options available from the **General Management Financials** tab of DVMAX. To access these options, select **General Management** from the **Section** menu on the DVMAX main screen then choose the **Financials** tab. Management Financials include batch printing of invoices, statement, monthly sales data and several activities related to credit and debit card transactions.

Batch Print Invoices

The Batch Print Invoice function prints full invoices within the date range you specify. You can sort by date or invoice number.

See **Batch Printing Invoices** in the **Invoicing** chapter of this manual for details on working with this functionality.

View Receivables

The **View Receivables** function displays a list of all outstanding receivables. The totals displayed reflect the receivable amount not the full invoice amount.


To view receivables:

- From the **Section** menu, choose **General Management**.
- From the **General Management** dialog, select the **Financials** tab.
- Select **View Receivables** from the **Financials** tab.
- The report will show receivables by posting date, client name, amount due and financing date.

Send Out Statements

DVMAX lets you print a statement for a single client or batch print or email a large number of clients. When a statement is printed, DVMAX records the activity in each client record for who you produced a statement.

A single statement can be printed or emailed directly from a Client record or you can run **Send Out Statements** from the **Financials** tab of **General Management** to batch print statements.

 The **Send Out Statements** function provides more options than printing a statement from the Client list or from a client record.


Print Client Statements from the Client List

A statement is a summary of all financial activity on the client's account. You can print a statement for one or more clients from the Client list, or open a selected client record and print a statement for that client. To print a statement from the Client list:

- From a list of client records, select the client or clients for whom you want to generate a statement.

- From the list of Client records, select **Print** from the **File** drop-down menu. You can also access the **Print** option from the **File** menu of an individual Client record.
- When you print a statement for a client, DVMAX will post a **STMT** transaction to the client's transaction history.

For more information on statements and client finances, see **Clients**.

 The **Email Statements** checkbox on the **Client General Info** tab is used when generating statements using the **Send Out Statements** option under General Management. See **Batch Print or Email Statements**.


Batch Print or Email Client Statements


DVMAX lets you batch print and/or email statements using the Send Out Statements option under General Management. The Send Out Statements function processes outstanding receivables and generates your choice of printed or emailed statements or both. In addition to letting you choose to email statements, the Send Out Statements feature also lets you optionally suppress billing and interest charges.

To batch print or email statements:

- From the **Section** menu, choose **General Management**.
- From the **General Management** dialog, select the **Financials** tab.
- Select **Send Out Statements** from the **Financials** tab.
- From the **Statement Setting** dialog, complete the information as needed.
- In the **Generate Statements for Names After** field type the last name or partial last name where you would like statements to begin. For example, if you want to begin the statement run with all clients from “Smith” onward, type “Smith” in the field. Leave this field blank if you want to generate statements for all clients.
- From the **Print or Email** drop-down list, select your printing/emailing option. To print statements (no email), select **Print**. To email where possible and print all remaining, select **Email First and Print Others**. To print a copy of all statements and also email statements where possible, select **Print All and Email Others**.
- Select **Add Interest and Billing Charges** if you wish to apply interest (where applicable) and billing charges (where applicable) to client statements.
- If you are running an Equine practice, DVMAX provides a Print Short Version Statement option. The Short Version Statement does not contain line item details.
- Click **OK** to generate statements.
- DVMAX asks you to confirm whether you want to or do not wish to add interest and billing fees (depending on whether you selected **Add Interest and Billing Charges**). Click **Confirm** to continue or **Cancel** to go back and change your selection.

- Statements will be emailed and/or printed as selected.
- Once the statement run has completed, DVMAX will ask you to confirm that the statement run printed successfully.
- Copies of the statements will be saved to client records.

 You should not click **Confirm** to confirm the statement run printed successfully until after you have checked that the statements have printed.

 You can only email statements if the client has a valid email address and Email Statements is selected from the General Info tab of the client record. In addition, the email functionality must be properly configured under System Constants. See the related section in **System Constants** form more information (see also **Email Reminders** in **System Constants**).

Print or Email Options

The following are the corresponding actions for the Print or Email Options:

Print: If you select **Print** from the Print or Email list, the statements will be printed only.

Email First and Print Others: If you select **Email First and Print Others**, you will email a statement to those clients with a valid email address and **Email Statements** selected on their client record, then all other statements will be printed. A printed copy of the statement will not be created for clients who receive an emailed statement.

Print All and Email Others: If you select **Print All and Email Others** you will email a statement to those clients with a valid email address and **Email Statements** selected on their client record. In addition, printed copy of the statement will be created for ALL clients who receive an emailed statement.

Short Version Statement

If you have an Equine practice, DVMAX gives you the option of printing the standard statement or the short version statement. The short version statement displays opening balance, a summary line for payments or credits applied, any charges for the current billing period and total outstanding balance.

Print Trainer Charges Statement

The Trainer Charges statement applies to Equine practices. The statement lists invoiced line items by trainer and patient within a specified date range or from the last billing statement. Invoice line item details are provided. In order for invoice line items to show on the statement, **Report Costs to Trainer** must be selected on the General Info tab of the patient record.

Display Monthly Sales Data

This function is NOT intended for accounting purposes. It displays monthly sales data by date. Values shown are 'trend totals' only. Refer to the **Reports** chapter for information on more detailed sales reports.

Show Sales Tax Collected

This function lists sales tax records by date for the past 6 months. Refer to the **Reports** chapter for information on more detailed sales reports.

View Credit and Debit Transactions

Use the View Credit/Debit Card Transactions to view, print or export the credit card transaction log. See the **Credit Card Processing** chapter for more information on working with credit and debit card transactions.

XCharge and DVMAX End Of Day Comparison

This function lets you compare credit card transactions in DVMAX to those posted to the XCharge gateway. You can only use this function if you use XCharge for processing credit and debit card transactions. See the **Credit Card Processing** chapter for more information on working with credit and debit card transactions.

Intuit QuickBooks Merchant Service Center

This function allows you to securely access the Intuit Quickbooks Merchant Center from your web browser. You can only use this function if you use Intuit Quickbooks for processing credit and debit card transactions. See the **Credit Card Processing** chapter for more information on working with credit and debit card transactions.

Release Current Open Batch for Settlement

This functionality can be used to force a settlement of the currently open batch at the XCharge Payment Processor rather than waiting for the batch to process at the scheduled time. You can only use this function if you use XCharge for processing credit and debit card transactions. See the **Credit Card Processing** chapter for more information on working with credit and debit card transactions.

The Medical Record Code (MRC)

A Medical Record Code (MRC) identifies and classifies treatments and products that a patient can receive from your practice. Medical Record Codes are used when you make a Medical Record Entry on a patient history. See **Working with Patient Records** for more information.

Medical Record Codes can also be linked to Bill Items. If a Medical Record Code is linked to a Bill Item, DVMAX will place that Medical Record Code on the patient history when that Bill Item is included on an invoice for that patient. It is possible to have multiple MRCs linked to a single Bill Item. See **Bill Items** and **Invoicing** for more information.

Like Diagnosis Codes, the MRCs can include linked external documents (such as LifeLearn documents) and editable templates that can be attached to the patient record when the MRC is applied. As well, Medical Record Codes can be set to update areas of the patient record other than the history. They can also initiate log entries or other procedures.

An Overview of the Medical Record Code

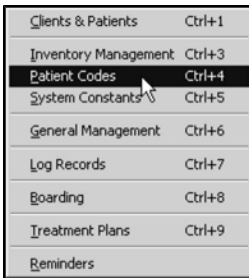
The Medical Record Code in DVMAX consists of a dialog box with 2 tabs: General Information (Code, Description and Notes) and a Documents tab (for linking external documents).

On the General Information tab, there are also settings that determine how the patient record will be affected when this MRC is placed on a patient history. For full information on Medical Record Code settings, see **Creating a Medical Record Code**.

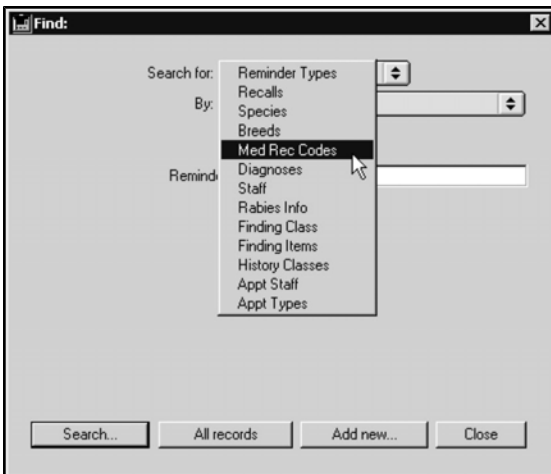
Listing All Medical Record Codes

To list all Medical Record Codes in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu.



- From the **Find** window choose **Med Rec Codes** from the **Search For** drop-down list.



- Click **All Records** at the bottom of the **Find** window.
- The **Medical Record Code List** displays containing all defined Medical Record Codes in DVMAX.

The Medical Record Code List

The Medical Record Code list displays one MRC record per line. There are columns for Code, Description and Notes. The **Notes** column contains any **Special Settings** for a Medical Record Code. See **Special Settings** for more information.

Code	Description	Notes
AP9999	Misc. Antiparasitic Tx	
AS1000	Anesthesia-Isolflurane/hour	
AS1025	Anesthetic Induction	
AS1050	Anesthesia-IV <20#	Controlled Substance
AS1100	Anesthesia-IV >20#	
AS1150	Anesthesia-IV Propofol/Catheter	
AS1200	Anesthesia-Ocular	
AS1250	Anesthesia-Local	X-Ray
AS1300	Anesthesia-Regional	Controlled Substance
AS5000	Monitoring-Doppler	
AS5050	Monitoring-EKG	
AS5100	Monitoring-Pulse Ox	(Major)
AS6000	Pre-Anesthesia Medications	
AS7000	Sedation/tranquilization	
AS9000	Anesthesia Package	
AS9050	*Anesthesia Package Discount	
AS9999	Misc. Anesthesia	
atest	a test	
B5	B5Test	
baz	baz	X-Ray

Buttons: Show, Exclude, Search..., Add new..., Close

You can sort the **Medical Record Code List** by Code or Description by clicking the appropriate column header.

Open a Medical Record Code

- Double click a selected Medical Record Code to view the record, or highlight a record and click **Show**.

Show a Subset of Records

- Click **Show** to display a subset of selected records.

Exclude a Subset of Records

- Click **Exclude** to hide a group of selected records.

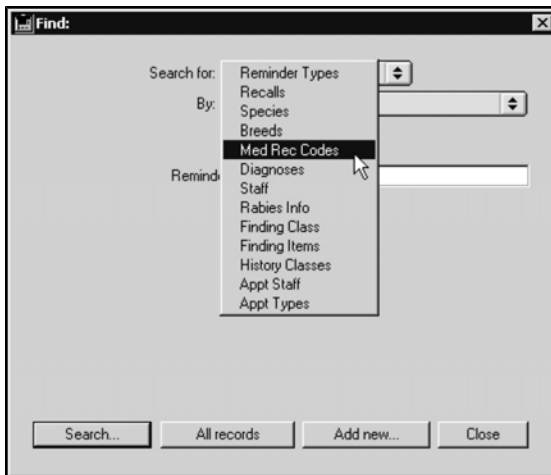
Search For Medical Record Codes

To find a Medical Record Code in DVMAX:

- Select **Patient Codes** from the **Section** drop-down menu.

Clients & Patients	Ctrl+1
Inventory Management	Ctrl+3
Patient Codes	Ctrl+4
System Constants	Ctrl+5
General Management	Ctrl+6
Log Records	Ctrl+7
Boarding	Ctrl+8
Treatment Plans	Ctrl+9
Reminders	

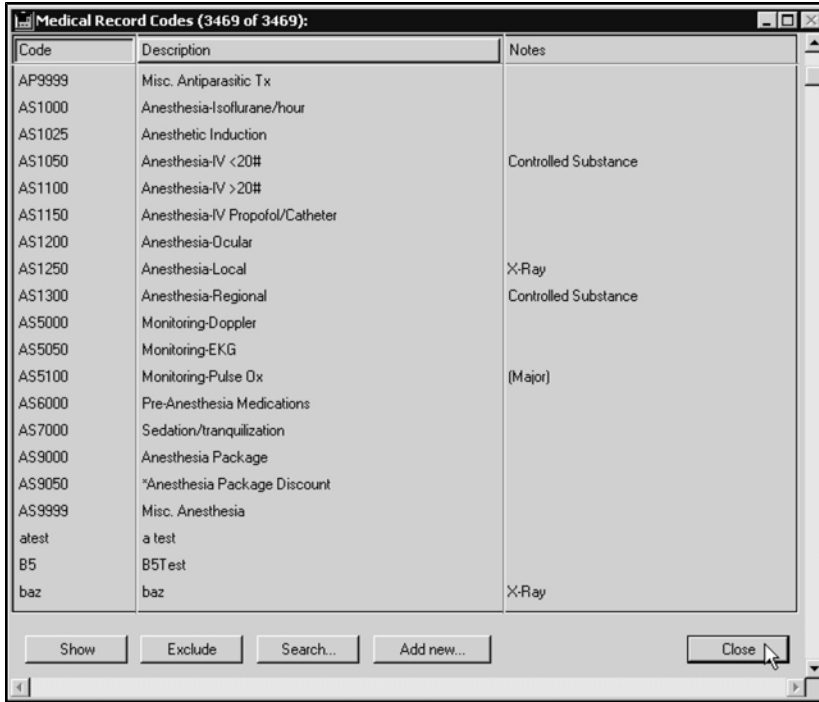
- From the **Find** window, click to select **Med Rec Codes** from the **Search For** drop-down list.



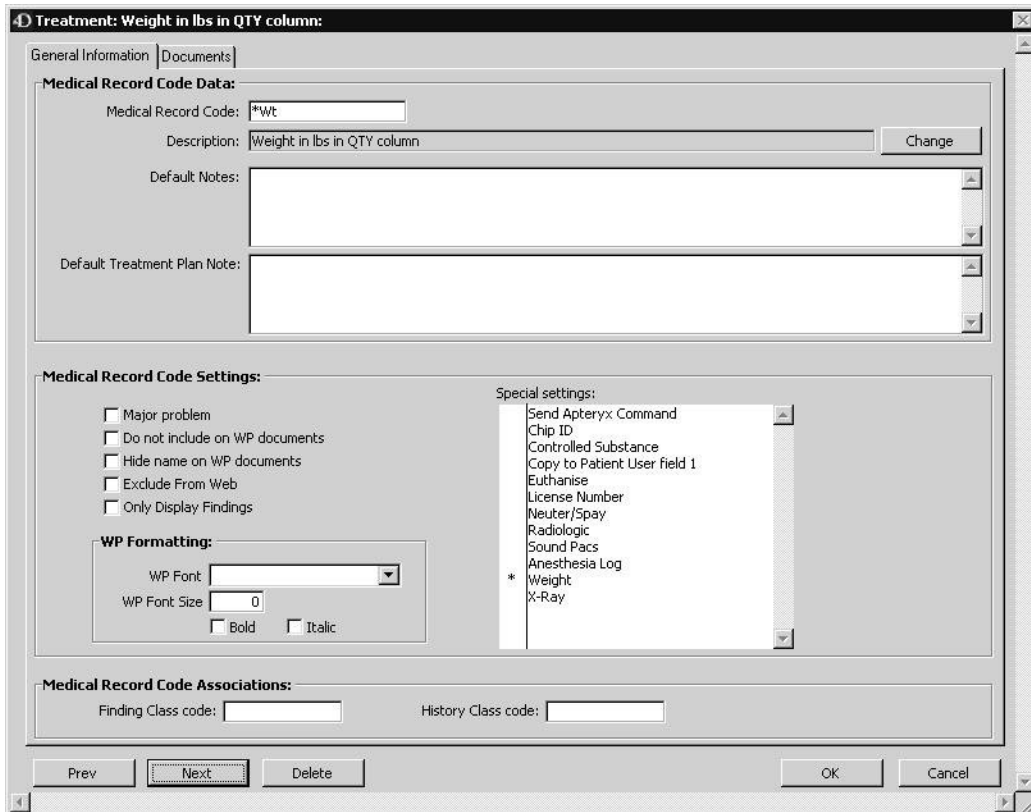
- Choose **Medical Record Code** from the **By** drop-down list to search Medical Record Codes by code.

-OR-

- Choose **Keyword in Description** to search the description fields of Medical Record Codes.
- Type a Medical Record Code or word(s) from an MRC description into the field below the **By** drop-down list. If you are searching by code, you can enter as many or as few of the characters of the Medical Record Code as you know. If you are searching by description, DVMAX will find all Medical Record Codes whose descriptions contain the word you type.
- Click **Search**.
- If there is more than one match for your search, the **Medical Record Code List** window will display containing a list of items that matched your search.



- If there is only one Medical Record Code that matches your criteria, DVMAX will open that Medical Record Code.



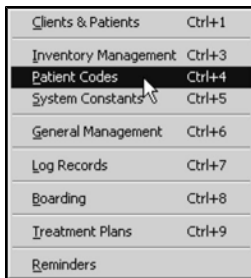
- If there are no matches, DVMAX will display a message to that effect and return you to the **Find** window to search again.



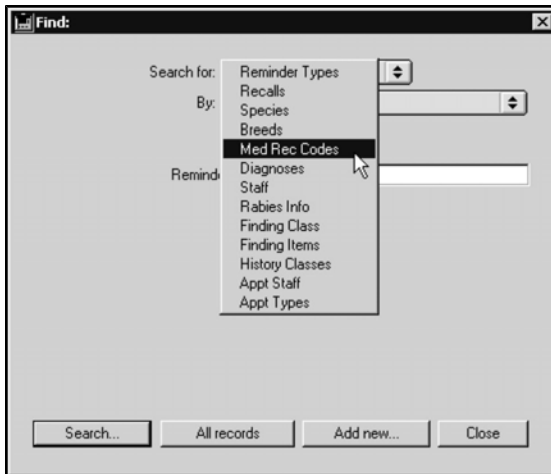
Creating a New Medical Record Code

To create a new Medical Record Code in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu.



- From the **Find** window, click to select **Med Rec Codes** from the **Search For** drop-down list.



- Click **Add New** at the bottom of the **Find** window.

i You can also create a new Medical Record Code by clicking the **Add New** button at the bottom of the **Medical Record Code Listing**.

- A new Medical Record Code window opens.

- Type a unique code for this MRC in the **Medical Record Code** field.
- Type a description of this MRC in the **Description** field.
- Type the text that DVMAX will automatically place on the patient record when this MRC is used into the **Default Notes** field.
- Type the text that DVMAX will automatically place on a Treatment Plan that uses this MRC into the **Default Treatment Plan Note** field.
- Click to select the **Major Problem** checkbox if you want DVMAX to place a date-stamped copy of this MRC in the Major Problems area when it is entered on a patient record.
- Click to select the **Do Not Include on WP documents** checkbox if you do not wish this MRC to be inserted on Word Processing documents. See **Word Processing** for more information.
- Click to select the **Hide Name on WP documents** checkbox if you wish the contents of this MRC, but not the name, to appear in Word Processing documents. This setting is useful for inserting comments on the patient record.
- Click to select the **Exclude From Web** checkbox if you do not wish Medical Record Entries containing this MRC to be available over the Internet. See **Web Patient Reporting** for more information.

! The **Hide on Web** checkbox on the Medical Record Entry screen is also selected and disabled if the MRE's underlying Medical Record Code has the **Exclude From Web** setting enabled.

- Click to select **Only Display Findings** if you only want findings displayed without comments for this MRC.
- Select the font size and attributes to be used in Word Processing documents.
- Click to place an asterisk (*) beside any Special Settings you want to apply when a Medical Record Entry containing this MRC is placed on a patient record. See **Medical Record Code Special Settings** for information about the effect of each Special Setting.
- If you want to be able to enter Findings on the patient record with this MRC, type a valid Finding Class Code in the **Finding Class Code** field. See **Linking a Medical Record Code to a Finding Class**.
- If you wish this MRC to be included in a History Class, type a valid History Class Code in the **History Class Code** field. See **Linking a Medical Record Code to a History Class**.
- Click **OK** to save the Medical Record Code.

Medical Record Code Special Settings

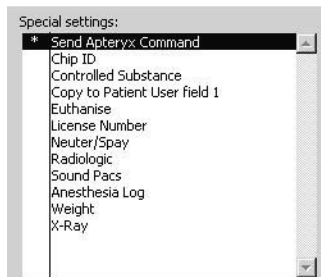
The **Special Settings** area of the Medical Record Code screen allows you to attach specific behaviors to the Medical Record Code. DVMAX will carry out the specified behaviors when a Medical Record Entry containing the Medical Record Code is created on a patient history.

To enable a special setting:

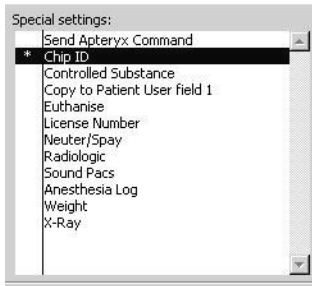
- Click in the column to the left of its name.
- An asterisk (*) will appear beside the name, indicating that the setting is active.
- To disable a special setting, click on the asterisk (*) beside the setting name. The asterisk (*) will disappear, indicating the setting is inactive.
- You can enable as many special settings as necessary for an individual Medical Record Code.

Send Apteryx Command

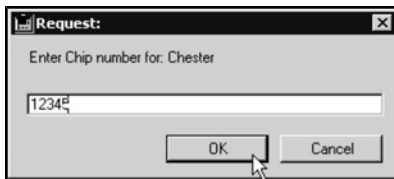
If the **Apteryx Command** setting is selected, DVMAX will attempt to send an Apteryx command.



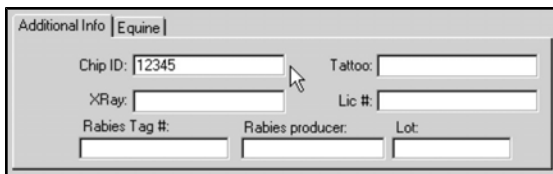
The Chip ID Setting



If the **Chip ID** special setting is selected, DVMAX will present the **Chip Number** dialog when you create a Medical Record Entry containing this MRC on a patient history.

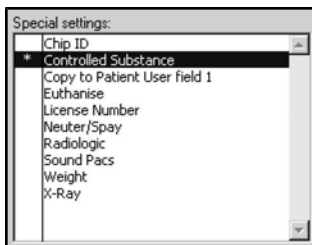


Typing the patient's Chip ID into the **Chip Number** dialog places the Chip ID on the General Information screen of the patient record.

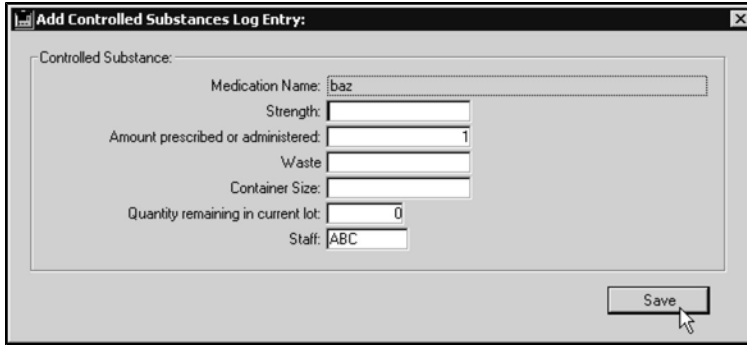


For more information on Chip IDs, see **Working with Patient Records**.

The Controlled Substance Setting



If the **Controlled Substance** special setting is selected, DVMAX will present the **Controlled Substance Log Entry** dialog when you create a Medical Record Entry containing this MRC on a patient history.

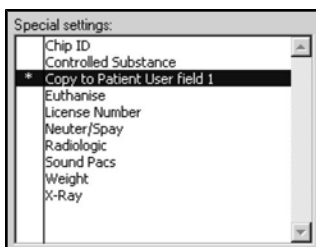


Completing the Controlled Substance Log Entry dialog makes an entry in the Controlled Substance Log. When you activate the **Controlled Substance** special setting, DVMAX will ask you to choose the Schedule, if any, that the Inventory Item associated with this MRC falls under.

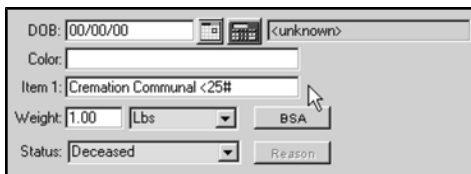


For more information on Schedules, see **Inventory**. For more information on the Controlled Substance Log, see **Log Records**.


The Copy to Patient User Field 1 Setting



If the **Copy to Patient User Field 1** special setting is selected, DVMAX will place the name of this MRC in the customizable **User Field 1** box on the **General Information** tab of the patient record.

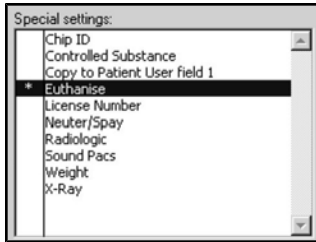


This is useful for classifying patients.

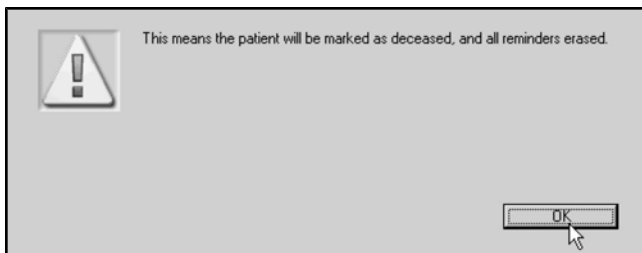
 This setting will completely overwrite any previous data in the User Field.

See **Working with Patient Records** for information on the Patient User Field.

The Euthanise Setting

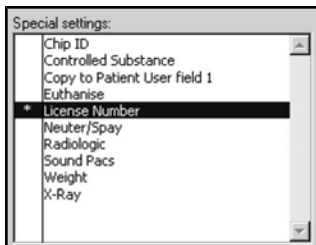


If the **Euthanise** special setting is selected, DVMAX will mark the patient as deceased when you create a Medical Record Entry containing this MRC on a patient history.

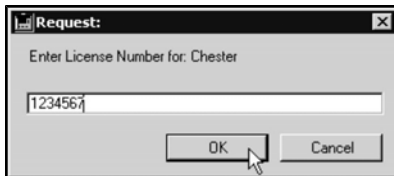


Marking a patient as deceased has several implications in DVMAX. See **Working with Patient Records** for more information.

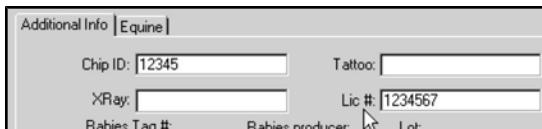
The License Number Setting



If the **License Number** special setting is selected, DVMAX will present the **License Number** dialog when you create a Medical Record Entry containing this MRC on a patient history.

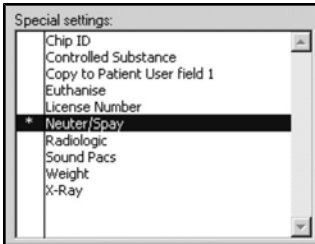


Typing the patient's License Number into the **License Number** dialog places the License Number on the General Information screen of the patient record.

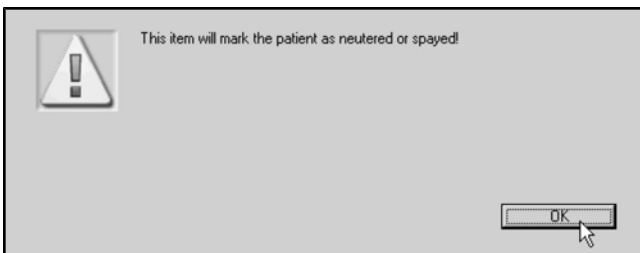


For more information on License Numbers, see **Working with Patient Records**.

The Neuter/Spay Setting

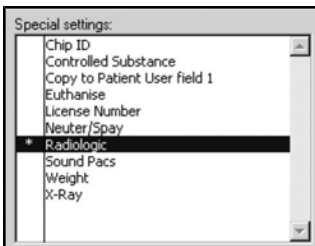


If the **Neuter/Spay** special setting is selected, DVMAX will mark a patient as neutered or spayed when you create a Medical Record Entry containing this MRC on a patient history.

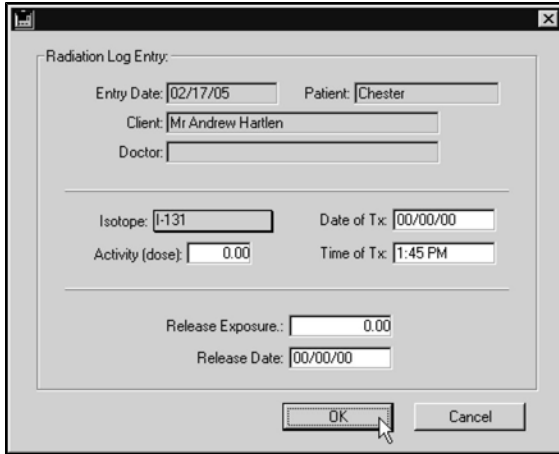


See **Working With Patient Records** for more information.

The Radiologic Setting

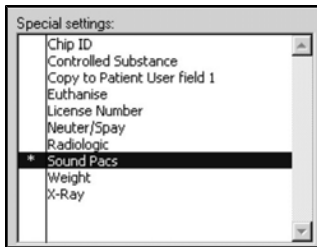


If the **Radiologic** special setting is selected, DVMAX will either initiate or complete a Radiation log entry when you create a Medical Record Entry containing this MRC on a patient history.



Completing the **Radiological Log Entry** dialog will make an entry in the Radiological log. For more information, see **Log Records**. For more information on Radiology integration in DVMAX, see **Working with Patient Records**.

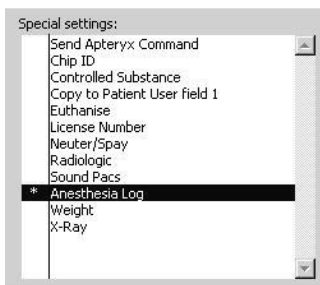
The PACS Link (Formerly Sound PACS) Setting



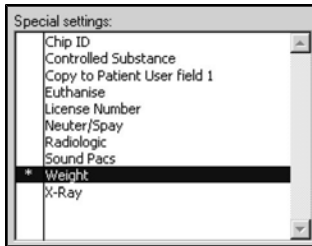
If the **PACS Link** special setting is selected, DVMAX will create and send a requisition to the DVMAXLink server when you create a Medical Record Entry containing this MRC on a patient history.

The Anesthesia Log Setting

If the **Anesthesia Log** setting is selected, DVMAX will add an entry in the Anesthesia Log when this MRC is used.



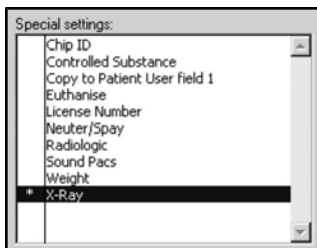
The Weight Setting



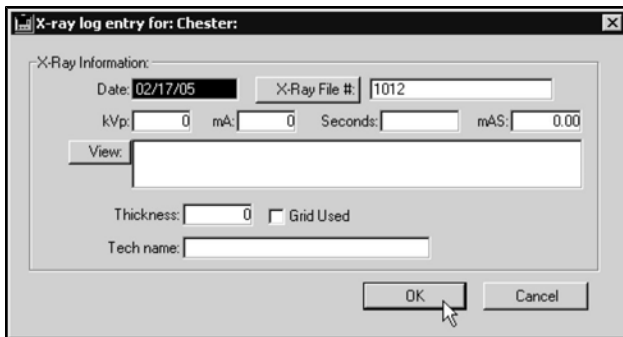
If the **Weight** special setting is selected, DVMAX will set the weight of the patient to the number entered in the **Quantity** field of the Medical Record Entry that contains this MRC. A note will also be made in the Patient **Notes** field with the date of the entry.

i This setting is intended for recording a patient’s weight while working on an invoice. You can enter the new weight as the **Qty** on an invoice line, and then enter a Bill item with a link to a Medical Record Code with the **Weight** special setting enabled. This will record a patient’s weight without leaving the Invoice screen.

The X-Ray Setting



If the **X-Ray** special setting is selected, DVMAX will present the **X-Ray Log Entry** dialog when you create a Medical Record Entry containing this MRC on a patient history.



Completing the **X-Ray Log Entry** dialog will make an entry in the X-Ray log. For more information, see **Log Records**. For more information on X-Ray integration in DVMAX, see **Working With Patient Records**.

Linking a Medical Record Code to a Finding Class

When a Medical Record Code is linked to a Finding Class, the **Findings** button will become available when you create a Medical Record Entry with that MRC on a patient history, allowing you enter specialized predefined Findings for the MRE.

For more information on Findings, see **Findings**. For more information on entering Findings on a patient history, see **Working With Patient Records**.

Linking a Medical Record Code to a History Class

History Classes allow you to insert items from a Patient's history in organized and related sections into a Word Processing document. When a Medical Record Code is part of a particular History Class, that MRC will be included in any patient Word Processing documents that make use of that History Class.

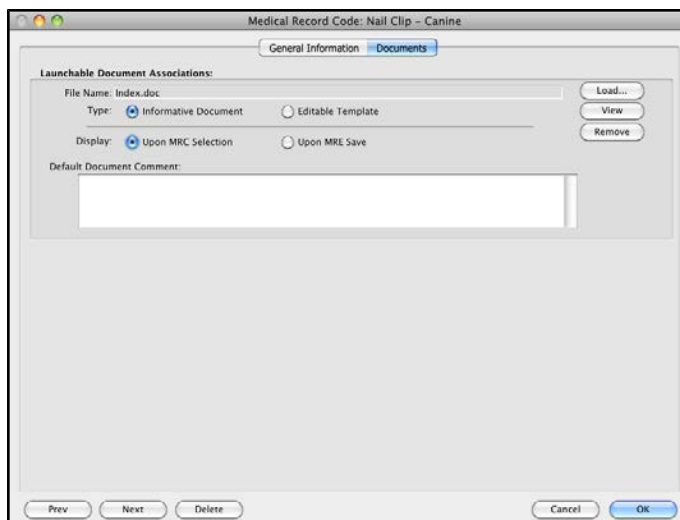
See **History Classes** for more information.

Linking a Document to an MRC

When an external document is linked to an MRC, the document will display when you enter the MRC on a patient history. Depending on the document type you select, it will either be an informative document (non-editable) or an editable document (such as a template).

To link a document to an MRC:

- From the MRC, click the **Documents** tab.



- From the **Documents** tab, specify the document location for the document you wish to link to the MRC under the **Launchable Document Associations** area.
- From the **File Name** field, click **Load** and select your document. The name of the file will display in the **File Name** field. Once you have specified the **Launchable Document Associations**, you can click **View** to see the doc-

ument. You can change the document at any time by repeating the **Load** process.

- From the **Type** options, choose **Informative Document** if you do not want the linked document to be added to the **Attachments** tab of the patient record when you use the MRC. Choose **Editable Template** if you may want an edited version of the document to be added to the **Attachments** tab of the patient record when you use the MRC.
- From the **Display** options, select **Upon MRC Selection** to have the document open when you click to create the diagnosis on the patient record, Choose **Upon MRE Save** to have the document open when you click to save the diagnosis to the patient record.
- In the **Default Document Comment** field, type the default comments you want to post to the **Comments** area of the **Attachments** tab of the patient record. These will only be applied to the **Attachments** tab of the patient record if you have chosen document type **Editable Template**.
- Click **OK** to save the **MRC**.

Modifying an Individual Medical Record Code

You can change any part of a Medical Record Code at any time, except for its unique code (because changing the code is equivalent to creating a new MRC). Patient records that use a modified Medical Record Code will **not** be updated to reflect your changes, with the exception of the MRC description. If you update the MRC description, the description will be updated on Patient records which use the MRC.

To update the description on all records which use this Medical Record Code:

- Click **Change** beside the **Description** field.

- DVMAX warns you that changing the description will change the name on all patient records containing this Medical Record Code.

- Click **Yes**.
- Type the new name into the **Description** field.
- Click **OK** to save the changed description.

i Changes made to the **Do Not Include on WP documents**, **Hide Name of WP documents** and **Exclude from Web**, as well as changes to any Special Settings or Finding or History Class associations, also take effect immediately.

Modifying Multiple Medical Record Codes

You can change Medical Record Code settings **en masse**. To modify multiple Medical Record Codes at once:

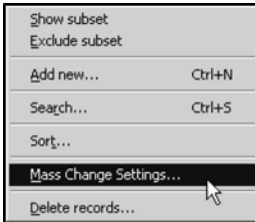
- List all Medical Record Codes

-OR-

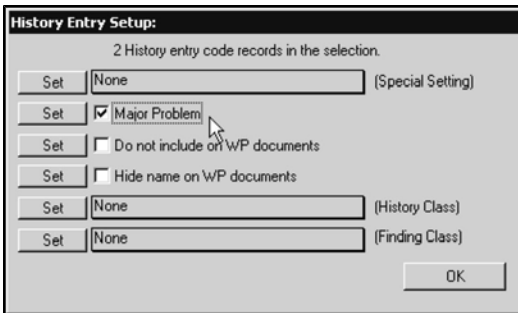
- Search for and Find the Medical Record Codes you wish to modify.
- Click to select the Medical Record Codes you wish to modify in the Medical Record Code list.

i Selecting no Medical Record Codes from the list is equivalent to selecting them all.

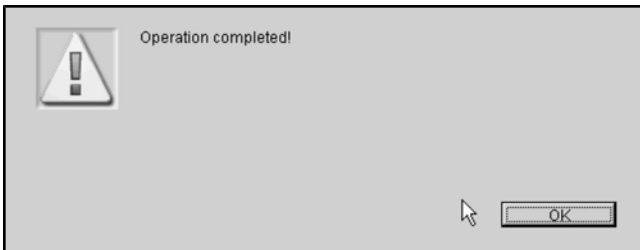
- Choose **Mass Change Settings** from the **Med Rec Codes** drop-down menu.



- The **History Entry Setup** dialog appears.



- Choose the settings you wish to change in the **History Entry Setup** dialog. Click the **Set** button for each change you wish to make. A dialog will appear when DVMAX has successfully changed a setting for the selected Medical Record Codes.



- Click **OK** to close the **History Entry Setup** dialog.

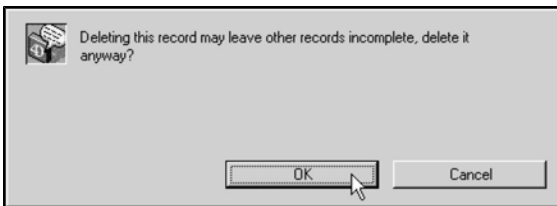
Deleting a Medical Record Code

To delete a single Medical Record Code from DVMAX:

- Find and open the Medical Record Code you wish to delete. See **Searching for and Finding a Medical Record Code**.
- Click **Delete** at the bottom of the Medical Record Code window.



- DVMAX will ask you to confirm that you want to delete the Medical Record Code.



- Click **OK**.

To delete multiple Medical Record Codes from DVMAX:

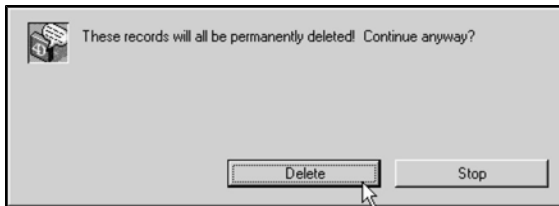
- List all Medical Record Codes (see **Listing All Medical Record Codes**).

-OR-

- Search for and find the Medical Record Codes you wish to delete. See **Searching For and Finding a Medical Record Code**.
- Click to select the Medical Record Codes you wish to delete.
- Choose **Delete Records** from the **Med Rec Codes** drop-down menu.



- DVMAX will ask you to confirm that you want to delete the Medical Record Codes.



- Click **Delete**.

! DVMAX does not recommend that you delete MRCs. When you delete a Medical Record Code, it will affect any Patient record on which an MRE containing that MRC has been placed. The text from the Medical Record Code will remain on the Patient record, but the Medical Record Code itself will be marked as invalid in the Medical Record Entry area on the Patient history. See Working With Patient Records for more information.

! Deleting a Medical Record Code will also leave incomplete any Bill Items that are linked to the deleted MRC. You should remove the link to the deleted Medical Record Code from any Bill Items that used the deleted MRC. See **Bill Items** for more information.

MRE Filtering

MRE Filtering allows you to narrow your view of Medical Record Entries on the History tab of a Patient record. You can filter the list of Medical Record Entries by any combination of the following criteria:

- Date
- Staff
- Site
- Medical Record Code
- Category
- Keyword

You can make MRE filters persistent - DVMAX can automatically apply them to all patient histories viewed on your terminal. DVMAX can also save MRE filters and load them automatically on startup.

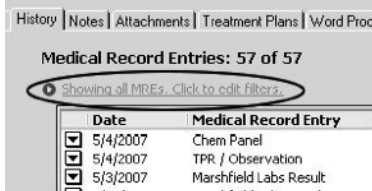
DVMAX notifies you that MRE filters are being applied by changing the color of the Medical Record Entry header on the Patient history screen to bright red:

! MRE filters can affect your view of a Patient’s medical history. It is vital to be aware of whether MRE filters are in effect when working with Patient information.

Applying a Simple MRE Filter

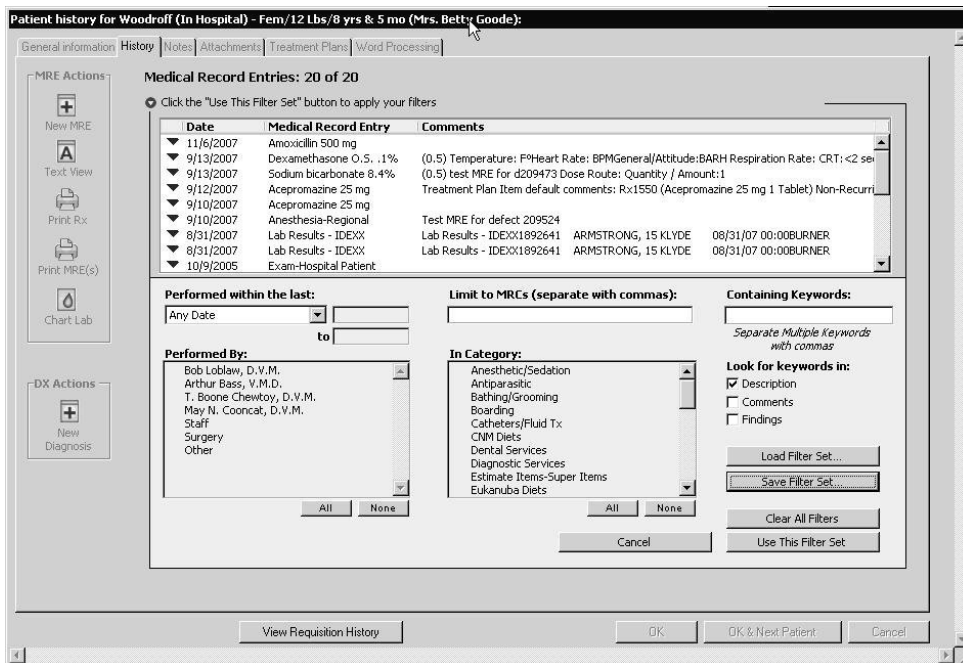
The following provides an illustrated example of applying filters to MRE History. To apply a simple MRE filter on a Patient’s history:

- Click the small triangle or the blue words underneath the Medical Record Entry header at the top of the History tab.



i CONTROL+R (COMMAND+R on the Macintosh) is a keyboard shortcut for activating the MRE Filter Controls.

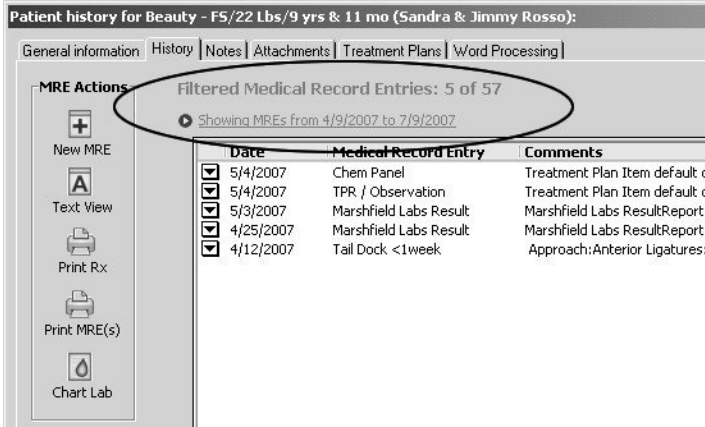
- The MRE Filter area opens.



- Choose a date range from the *Date* drop-down menu.
- Click *Use This Filter Set*.



- Note that the Medical Record Entry header is now bright red to indicate that filters are in place, and that the text immediately below the header and immediately above the MRE list has changed to reflect the filters you have put in place.



The MRE Filters: An Overview

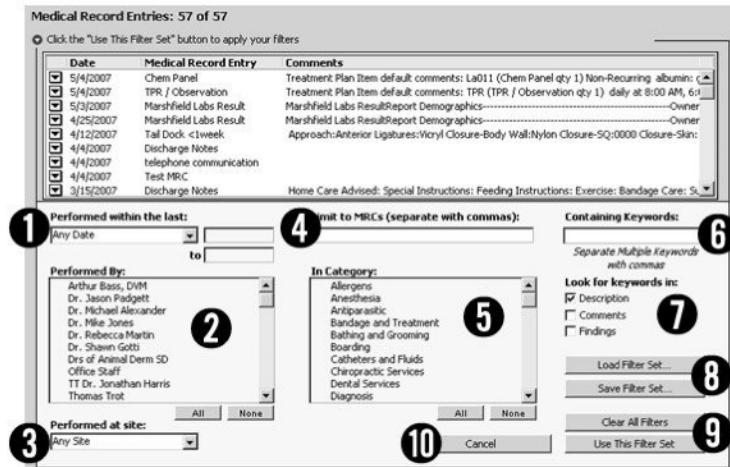
MRE Filters include the following:

1. *Date Filter:* You can filter a Patient’s medical history by any date range. Common date ranges are provided in the drop-down list; you can enter another date range by choosing *Custom*.

i You can use standard DVMAX date shortcuts (such as “T” for tomorrow, “Y” for yesterday, or -3 for three days ago) in the date fields that become active when entering a custom date.

2. *Staff Filter:* Any staff marked as a Doctor or Provider appears in the *Staff* list box can be selected. You can filter a Patient’s medical history by clicking any number of Doctors or Providers.

3. *Site Filter:* This filter control will appear only if your installation of DVMAX encompasses multiple sites. You can choose a site from this drop-down list to limit the list of MREs to those performed at a particular site.



4. *Medical Record Code Filter:* You can type as many Medical Record Codes as you need into this field. Separate each code with a comma. You can use the wildcard operator in this field: for instance, “rx@” will match any Medical Record Entries in the Patient’s history that begin with the letters “rx”.

i The wildcard operator can only be used at the end of a search term. For example, “dx@” is a valid MRE filter, whereas “d@x” is not.

5. *Category Filter:* You can filter the Medical Record Entries in a Patient’s history by clicking to choose any number of categories. An MRE’s category is determined by its linked Bill Item.

6. *Keyword Filter:* You can type as many keywords as you need into this box. Separate each keyword with a comma. You can use the wildcard operator in this box: for instance, “surg@” will match “surgical” and “surgery”.

i The wildcard operator can only be used at the end of a search term: “surg@” is a valid MRE filter, whereas “s@ic” is not.

7a. *Description Checkbox:* Selecting this checkbox will make DVMAX search the descriptions of a Patient’s Medical Record Entries for the text you have typed in the Keyword Filter box. If this field is not selected, DVMAX will ignore MRE descriptions when applying a Keyword Filter. The Description field has no effect if the Keyword Filter field is empty.

7b. *Comments Checkbox:* Selecting this field will make DVMAX search the comments in a Patient’s Medical Record Entries for the text you have typed in the Keyword Filter field. If this box is not selected, DVMAX will ignore MRE Comments when applying a Keyword Filter. The Comments field has no effect if the Keyword Filter field is empty.

7c. *Findings Checkbox:* If this field is selected, DVMAX will search the Findings of a Patient’s Medical Record Entries for the text you have typed in the Keyword Filter box. If this checkbox is not selected, DVMAX will ignore Findings text when applying a Keyword Filter. The Findings field has no effect if the Keyword Filter field is empty.

! If your practice has used Findings in versions of DVMAX prior to v7.0.10, be sure to check *both* the Comments and Findings checkboxes when constructing a Keyword MRE Filter designed to find Findings text. Previous to version v7.0.10, DVMAX stored Findings as part of an MRE's comments; this is no longer the case as of version 7.0.10 and forward.

8a. Load Filter Set: Use this button to load a Filter Set you have saved previously with the *Save Filter Set* button.

8b. Save Filter Set: Use this button to save your MRE filter for later use. You will be required to name the Filter.

9a. Clear All Filters: Click this button to clear any applied filters and view all MREs in the Patient History.

9b. Use This Filter Set: Click this button to apply the Filters you have defined to the current Patient's history.

10. Cancel: Click this button to close the MRE filter interface and return to the main Patient History screen. The list of MREs on the history screen will be as you left it when you activated the MRE filter interface.

Activating the MRE Filter Controls

To activate the MRE Filter Controls, click the small disclosure triangle or the underlined text immediately below the Medical Record Entry header.

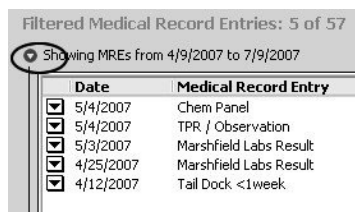


i CONTROL+R (COMMAND+R on the Macintosh) is a keyboard shortcut for activating the MRE Filter Controls.

Hiding the MRE Filter Controls

There are several ways to hide the MRE Filter Controls and return to the History view.

- Click the small, open *disclosure triangle* immediately below the Medical Record Entry header (this is the equivalent of clicking *Apply Filters*, described below)



-OR-

- Click *Cancel* if you do not wish to apply any further filters

-OR-

- Click *Use This Filter Set* to apply your filters and return to the main History screen.



i CONTROL+R (COMMAND+R on the Macintosh) is a keyboard shortcut for deactivating the MRE Filter Controls. This key combination has the same effect as clicking *Apply Filters*, described above.)

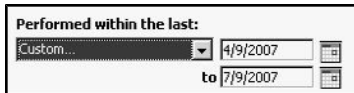
The Date Filter

To apply a date filter to the MRE list on Patient History:

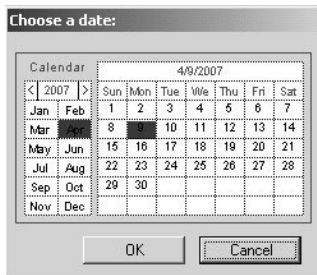
- Choose a preset date range from the *Date* drop-down list.

-OR-

- Choose *Custom* from the *Date* drop-down list, and type or select a Start Date and an End Date.



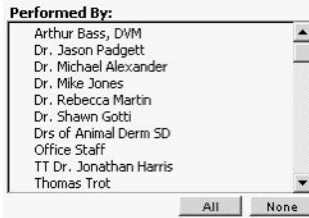
i Standard DVMAX date shortcuts can be used in the Start and End date fields. You can also click the Calendar icon beside either date field to choose a date from a calendar.



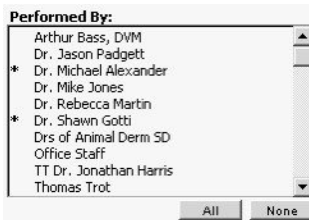
The Staff Filter

To apply a staff filter to the Medical Record Entries on a Patient's History:

- Click in the *Performed By* staff list to choose the staff you want to include in the filter.



- When a Staff member has been selected, an asterisk (*) appears beside their name.



i Only Staff currently marked as Doctors or Providers appear in the Staff list. If an MRE was performed by a Staff member no longer listed as a Doctor or Provider (most likely because they are no longer employed at your Practice), you can catch this item in a filter only by using the last item in the Staff list, “Other”.

The All and None Buttons

- Click *All* below the Staff list to quickly select all Staff members for inclusion in a filter.
- Click *None* to remove all Staff from a filter.

! *All* and *None* accomplish the same thing. Applying an MRE filter with all Staff selected produces identical results as not filtering by Staff at all. Use the *All* and *None* buttons as shortcuts to aid in selecting large numbers of staff for a filter. If you want all MREs to be included, regardless of Staff, click *None*.

The MRC Filter

To apply a Medical Record Code filter to the Medical Record Entries on a Patient’s History:

- Type the MRC you want to filter on into the *Medical Record Code* field. If you wish to filter on more than one MRC, separate multiple MRCs with commas.



- After adding at least one MRC to the field, press <Tab> to exit the *Medical Record Code* field and see the results of your filters.

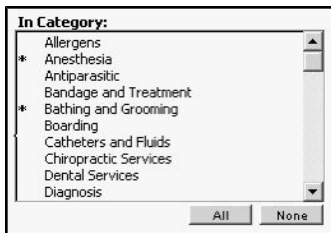
i If you cannot remember the Medical Record Code you wish to filter on, type as much as you can remember and press the *Tab* key. DVMAX will show you a pick list of MRCs that contain what you typed.

i You can use the wildcard operator to include groups of MRCs in your filters. For example, using an MRC filter of “rx@” will look for all MREs linked to any Medical Record Code that begins with “rx”. You can use the wildcard operator only at the end of an MRC filter term.

The Category Filter

To apply a Category filter to the Medical Record Entries on a Patient’s History:

- Select at least one item from Category list.
- When a Category has been selected, an asterisk (*) appears beside the Category.



! Depending on the setup of your datafile, it is possible for MREs not to be included in any Category at all. If you suspect this is the case, try including “Uncategorized” (the last item in the Category list) in the Filter, or use a Medical Record Code filter to include the MRE you need.

The All and None Buttons

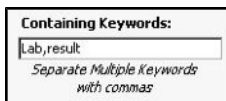
- Click *All* below the Category list to quickly select all categories for inclusion in a filter.
- Click *None* to remove all categories from a filter.

! *All* and *None* accomplish the same thing. Applying an MRE filter with all Categories selected produces identical results as not filtering by category at all. Use the *All* and *None* buttons as shortcuts to aid in selecting large numbers of categories for a filter. If you want all MREs to be included, regardless of category, click *None*.

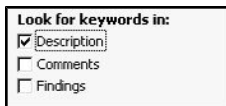
The Keyword Filter

To apply a Keyword filter to the Medical Record Entries on a Patient’s History:

- Type the keyword you want to filter on into the *Keyword* field. If you wish to filter on more than one keyword, separate multiple keywords with commas.



- Click the *Description*, *Comments*, and *Findings* checkboxes as desired.



- Click *Use this Filter Set* to see the results of your keyword filter.



i You can use the wildcard operator to include multiple keywords in your filters. For example, using an keyword filter of “recover@” will find an MRE that contains either “recovering” or “recovery”. You can use the wildcard operator only at the end of an keyword filter term.

! If your practice has used Findings in versions of DVMAX prior to v7.0.10, be sure to check *both* the Comments and Findings checkboxes when constructing a Keyword MRE Filter designed to find Findings text. Previous to version v7.0.10, DVMAX stored Findings as part of an MRE’s comments; this is no longer the case as of version 7.0.10 and forward.

Applying Filters

As you define your MRE filters, you can see the results immediately in the MRE list as you move from filter to filter. To properly apply your filters and continue working with Patient History:

- Click *Use this Filter Set*.



- This will activate your filters. The Medical Record Entry header becomes bright red, and a description of the filters in place appears directly below the header. You can modify your filters at any time.

Saving a Filter Set

You can save a set of MRE filters for use at any time. To save a filter set, first set the filter criteria you want, then:

- Click *Save Filter Set*.

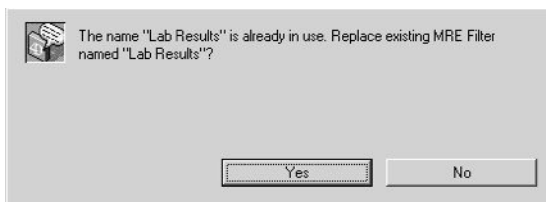


- The *Save Filter Set* dialog opens.



- Type a name for your filter set. Names can be any length, and may include spaces.
- Click *OK*.

i The name you give a filter set must be unique. If you type a name of an existing filter set, DVMAX will ask you if you want to replace the existing filter set.



- Click *Yes* to replace the existing filter set.
- Click *No* to return to the *Save Filter Set* dialog and type a new name.

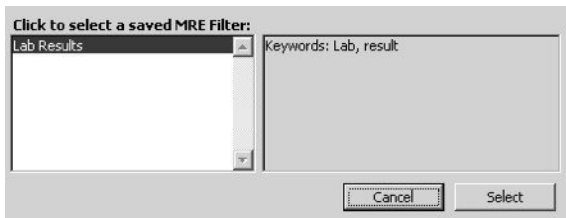
Loading a Saved Filter Set

To load a saved filter set:

- Click *Load Filter Set*.



- The *Saved Filter Sets* dialog appears



- Click a filter set from the list on the left hand side of the dialog to choose it.

i A summary of the selected filter's criteria appears in the right hand side of the dialog window.

- Click *Select* to load the filter set and return to the Patient History screen. The filter set you selected will be in place, and the MRE filter controls will remain active. You can make modifications to the filter you have loaded.

To activate your loaded filter set:

- Click *Use this Filter Set*



Deleting a Saved Filter Set

To delete a saved filter set:

- Choose *Preferences* from the *File* menu. The *Preferences* dialog appears.
- Click the *History Filters* tab.
- Click once in the filter list to highlight the filter you wish to delete.
- Click *Delete Selected Filter*. The filter is deleted immediately.
- Click *OK* to close the *Preferences* dialog.

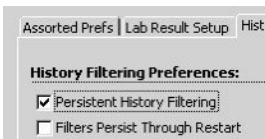
Persistent MRE Filters

If MRE filters are not persistent on your DVMAX terminal, filters that you define apply only to the patient record on which you define them. If MRE filters are set to be persistent, however, any defined MRE filter will apply to **all** Patient records you access while logged into your DVMAX terminal.

For example: You are working with Patient A. You set up an MRE filter to show only MREs from the last week. You finish working with Patient A, close its record, and open Patient B. If persistent filters are on, you will see only MREs from the last week for Patient B (along with a bright red indication that this MRE filter is in place). If persistent filters are off, you will see all MREs in Patient B's history.

To enable or disable persistent MRE filters:


- Choose *Preferences* from the *File* menu.
- From the *Preferences* tabbed dialog, click the *History Filters* tab.
- Click to select the *Persistent History Filters* checkbox to enable Persistent History Filtering. To disable persistent filtering, clear the *Persistent History Filtering* checkbox.



Persistent Filters Through Restart

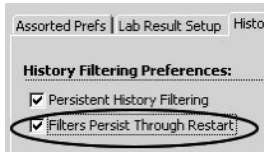
If *Persistent History Filters* are active, you can also choose to have your active MRE filter saved when you quit DVMAX and reloaded when you next log in.

For example: The *Persistent History Filters* checkbox is selected, and you set up an MRE filter to show only MREs from last week. You then quit DVMAX for the day. The next morning you log in again. If *Filters Persist Through Restart* is checked, you will see only MREs from the last week (along with a bright red indication that this MRE filter is in place). If the setting is not checked, you will see all MREs in a Patient's History.

 The *Filters Persist Through Restart* setting has no effect on Saved MRE filters (which appear in the Filter list in the History Filtering Preferences dialog).

To enable or disable persistent-through-restart MRE filters:

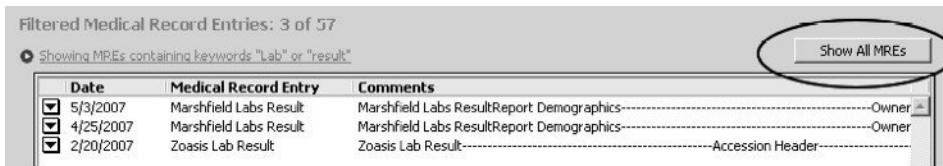
- Choose *Preferences* from the *File* menu.
- From *Preferences*, click the *History Filters* tab.
- From the *History Filters* tab, select the *Filters Persist Through Restart* checkbox to enable this setting. To disable, clear the *Filters Persist Through Restart* checkbox.



Clearing (Turning Off) MRE Filters

To turn off all Filters on the Patient *History* tab:

- If the MRE Filter Controls are not visible, click *Show All MREs*.



-OR-

- If the MRE Filters are visible, click *Clear All Filters*.



- Click *Use This Filter Set* to close the MRE Filter controls.



How Filters Interact

MRE Filters are cumulative. In other words, only MREs that match *all* of the filter criteria will show up in the list of MREs once a filter has been applied. If an MRE matches one criteria, but not another, it will not pass through the filter and will not appear in the MRE list on Patient History.

For example:

- A patient has two MREs in its history: “Annual Exam”, performed 11 months ago, and “Dental Exam”, performed 3 days ago.

With this History:

- A filter for the keyword “exam” would show both MREs
- A filter for MREs performed in the last week would show only the Dental Exam
- A filter for the keyword “exam” in the last week would show only the Dental Exam (because the Annual Exam does not match all filter criteria).

Filters and MRE Text View

MRE Filters will be in effect in Text View (and printed version of Patient History) if the *Filters Apply to Text View* setting is enabled. If this setting is not enabled, no MRE filters are taken into account in Text View or printed Histories.

To apply filters to Text View and printed histories:

- Choose *Preferences* from the *File* menu.
- From *Preferences*, click the *History Filters* tab.
- From *History Filters Preferences* select *Filters Apply to Text View* if you want MRE filters to apply to Text View and Printed Histories

-OR-

- Deselect the *Filters Apply to Text View* checkbox if you do not want MRE filters taken into account in Text View and Printed Histories.



- Click *OK* to close the *Preferences Dialog*.

Multi-Language Support

DVMAX currently supports invoice and statement printing in English and Finnish.

The Practice Language Preference

The Practice Language Preference determines which language DVMAX will use when printing client invoices and statements. To set the Practice Language:

- Choose **System Constants** from the **Section** drop-down menu.
- Click the **Default Constants** tab
- Choose a language from the **Language** field in the **Practice Preferences** section of the **Default Constants** tab.

- Click **OK** to save your changes.
- Click **OK** to exit **System Constants**.

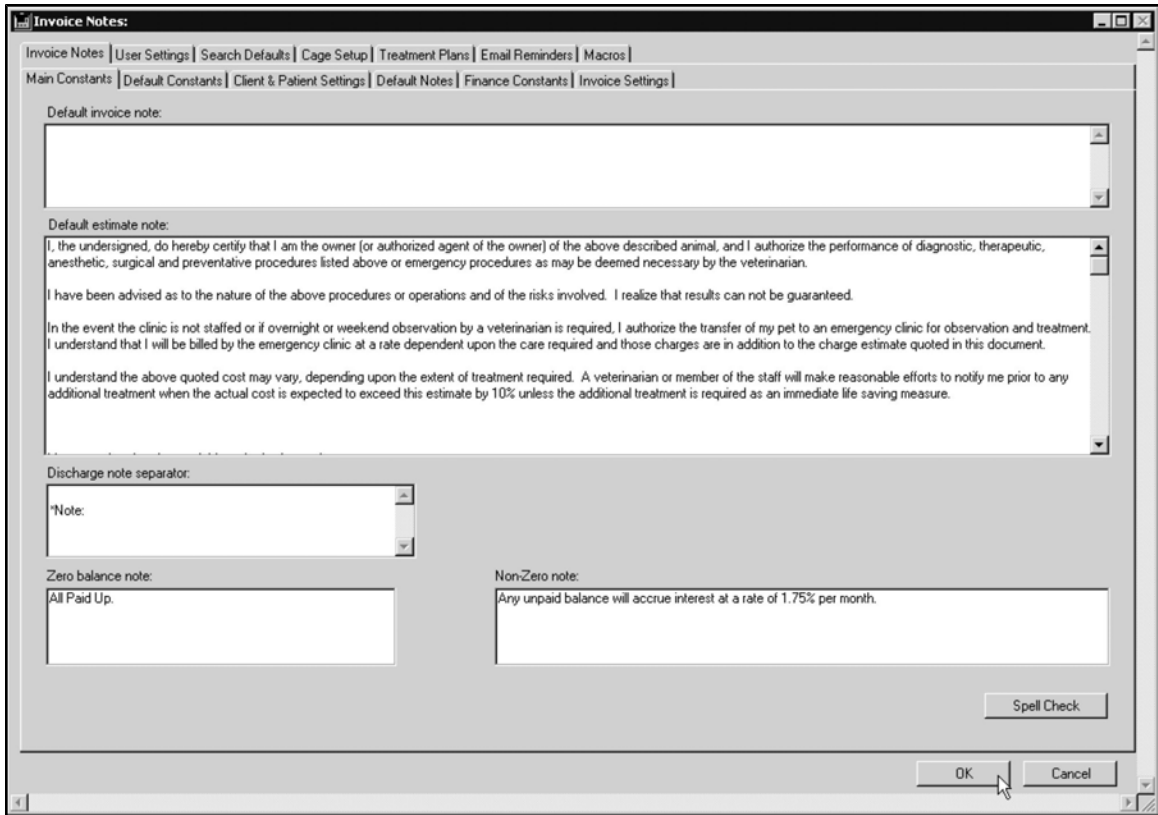
Practice Language and Invoices

DVMAX will automatically print invoices in the chosen Practice Language. The following invoice fields, however, will need to be entered in the appropriate language in **System Constants**:

- Default Invoice Note
- Zero Balance Note

- Non-Zero Note

These items can all be edited on the **Invoice Notes** tab in **System Constants**.



See the **Invoicing** section of this reference for more information.


Reference Number for Finnish Invoices

If the chosen Practice Language is Finnish, DVMAX will automatically calculate and place on the printed invoice the necessary **Viiitenumero** reference number.

QUAD		LASKU					
22 Twain Loop Lionel, CA 92222		Eläinlääkintäpalvelut					
Puh: 800-877-1787		Tili: 3314					
Mr. Andrew Hartlen Lionel, CA 92222 800-877-9221		Laskun numero: 100062 Laskun pvm: 10/26/05 Eräpäivä: 11/02/05 Y-tunnus (ALV. rek.): 123456 Tilinumero: 0996-225-0088 Hoitaja: Eli T. Boone Chewtoy, D.V.M. Vitenumero: 100062.7					
Käyntitiedot							
Kpl	Pvm	Potilas	Peruste	Henkilök	A hinta	Yhteensä	Vero
1	10/26/05	Buffy	IDCCro6-lame Cat	Cattfish 6oz. TBC	16.54	16.54	bc
						Käynti yhteensä:	16.54
Maksutiedot							
						Käynti yhteensä:	16.54
Maksu 1:		Summa: 0.00				Vero: 1.20	
Huomautus:						Lasku yhteensä: 17.74	
Maksu 2:		Summa: 0.00				Aikaisemmat saatavat: 319.01	
Huomautus:						Maksettu: 0.00	
						Maksamatta: 336.75	
Potilastiedot							

The Payment Due Delay Setting

The **Payment Due Delay** setting allows you to specify the amount of time before an invoice becomes due on a per-client basis. The Payment Due Delay setting is specified in days, and is the number of days from the posting of the invoice until the invoice is due.


 Currently, the **Payment Due Delay** setting applies only if the Practice Language Preference is set to Finnish. The calculated due date appears only on the printed Finnish invoice. The due date is a one-time calculation – if the invoice is reprinted at a later date, the due date will not change.

Setting the Default Payment Due Delay

To set the default **Payment Due Delay** that will apply to all new clients:

- Choose **System Constants** from the **Section** drop-down menu.
- Click the **Finance Constants** tab.
- Type the number of days until an invoice becomes due in the **Default Payment Due Delay** field.

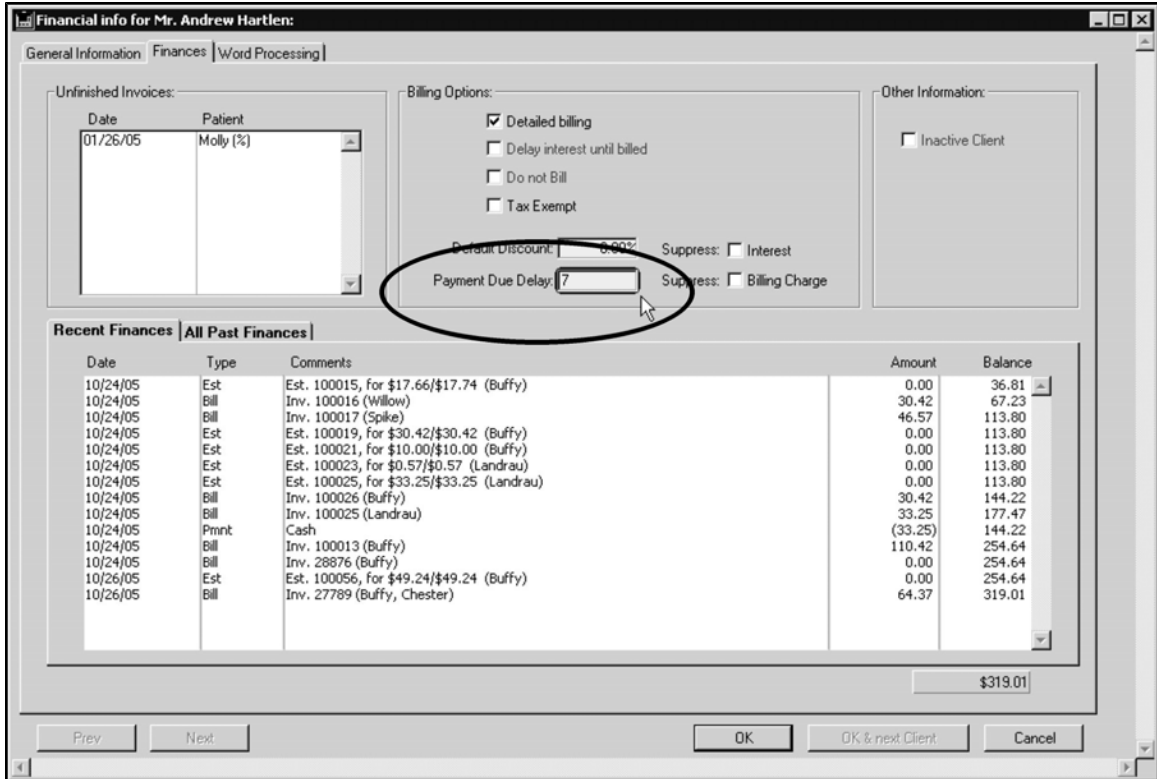
- Click **OK** to save your changes.
- Click **OK** to exit System Constants.

 DVMAX will apply the default Payment Due Delay setting to any new clients. The setting will not be applied to existing clients. To set a **Payment Due Delay** for an existing client, see **Specifying a Payment Due Delay for an Individual Client**.

Specifying a Payment Due Delay For an Individual Client

To set the Payment Due Delay for a single client:

- Open the **Finances** tab of the client record you wish to change.
- Type the number of days until an invoice becomes due in the **Payment Due Delay** field.



- Click **OK** to save your changes.

Practice Language and Statements

DVMAX will automatically print statements in the chosen **Practice Language**. The following statement items, however, will need to be entered in the appropriate language in System Constants:

- Billing Note

You can edit the Billing Note in the **Default Notes** tab in **System Constants**.

Working with Patient Records

Patient records hold information about all of the patients in your practice, giving you access to vital patient information, reminders, recalls, history (Medical Record Entries and Diagnoses), notes and more.

All Patient records are associated with a Client record, and because all Patients must be associated with a Client, new Patient records can only be created from a Client record. Existing Patient records can be accessed either directly or through the associated Client record.

In addition to extensive reporting capabilities, DVMAX provides a powerful Word Processing window where information from all parts of the Patient record can be used to construct a fluid and effective communication to the client, to a referral source, or for specialized forms and other documents.

Search for Patient Records

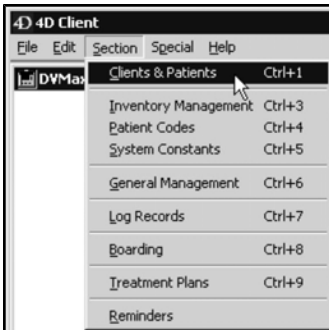
To find a Patient record:

- Click **Patients** on the Command Palette.

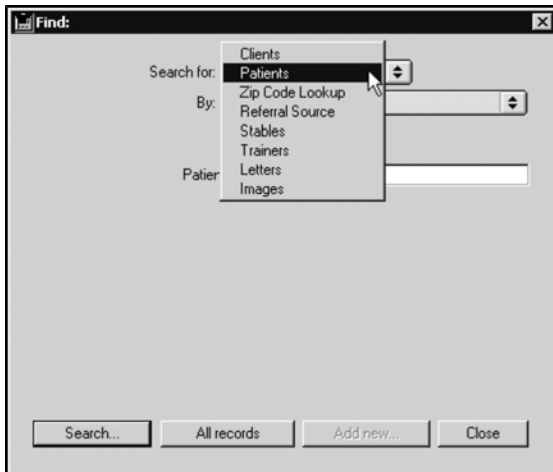


-OR-

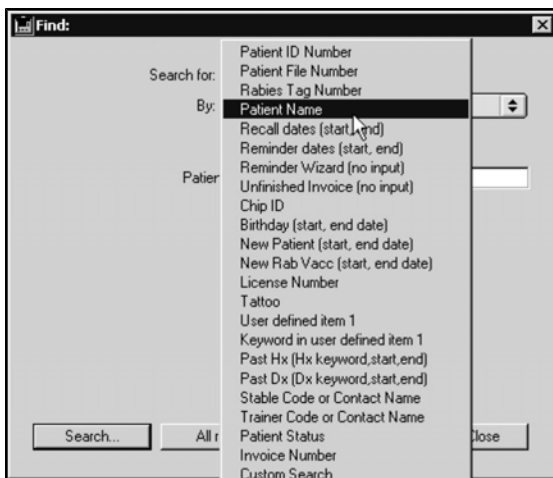
- Choose **Clients & Patients** from the **Section** drop-down menu.



- From the **Find** window choose **Patients** from the **Search For** drop-down list.



- Choose a criterion from the **By** drop-down list. See **Search Criteria** for more information.



- If necessary, type an appropriate search term into the field below the **By** drop-down list. See **Search Criteria** for more information on appropriate search terms. The label of this field is determined by your choice from the **By** drop-down list.
- If your practice has multiple sites, choose a site from the **Site** drop-down list.
- Click **Search**.

i You can Copy/Paste text into fields in the **Find** dialog.

- If there is more than one match for your search, the **Patient List** window will display a list of patients that matched your search.

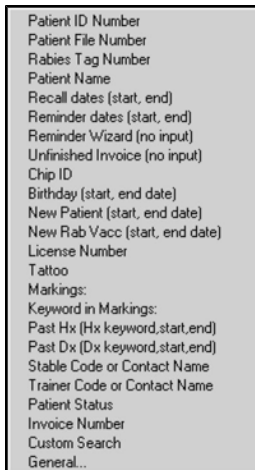
STS	ID	Name	Sex	Species - Breed	Owner name	Telephone
AC	8134	Elmer	Fem	Dog - MONGREL	Joyce Ames	754-754-5394
AC	7765	Elroy	Male			
AC	7924	ertyu	Male			
AC	7725	Fawn's Dr. Peppurr	Male		Rebecca Batson	302-754-7036
AC	8062	Flaky	Fem	Canine -	Tracy Aaron	302-754-5815
AC	8067	Flippy	Mare		Mr Mikey Jarison	
AC	8072	Fluffy	Mare		Mr. Richard Andrew	302-754-8857
AC	593	Fluffy	% MN	Feline - Abyssinian Mix	P. Greenman & K. Stecher	646-674-1210
AC	7613	Fluffy	FS	Feline - Domestic Short Hair		
AC	7779	Fluffy	Male			
AC	8106	Fluffy Blue	FS	Feline - Turkish Angora	Amy Calloway	302-846-0632
AC	20	Flush	FS	Rodent-Rat	Hon. Elizabeth Crown	
AC	8078	Forky	Mare		Karen Hulliger	302-754-5643
AC	8019	Frankie	Fem		Mr Tide	
AC	588	Fred	Fem		Mr Harry Potter	
AC	7984	Freddy	Mare		Mr Test11 Client11	
AC	8032	Frisky	% FS	Canine - Basset Hound	Betty Anthony	410-754-8147
AC	8148	Fuffi	Fem	Feline - Siamese	Dr. Arthur Bass	215-646-1446
AC	7710	Genghiskhan	Male			
AC	8081	Gentry	Fem	Canine -	Dr. Arthur Bass	215-646-1446

- You can sort the Patient list by Patient Status, File Number, Patient Name or Client Name. For more information, see **The Patient List**.
- If there is only one record that matches your criteria, DVMAX will open that Patient record.
- If there are no matches, DVMAX will display a message to that effect and return you to the **Find** window to search again.



Patient Search Criteria

DVMAX allows you to search for patients in many ways. A brief description is provided in the following sections.



Search By Patient ID Number

Select **Patient ID** from the **By** menu, then enter a Patient ID in the **Patient ID Number** field to search for a patient based on their ID number. This is an exact match search.

Search By Patient File Number

Select **Patient File Number** from the **By** menu, then enter a Patient file number in the **Patient File Number** field to search for a patient based on their file number. This is an exact match search.

Search By Rabies Tag Number

Select **Rabies Tag Number** from the **By** menu, then enter a Tag#, as would be found in the Tag# field of the Patient record, in the **Rabies Tag Number** field. This is an exact match search.

This search finds all patients with the entered tag number regardless of the year the tag was issued. Leaving the tag number blank and searching will bring up a list of all patients who have a rabies tag number on file. To search for a tag number that has been replaced in the Tag# field, you can do a General Search in the Patient Comments area.

Search By Patient Name

This search lets you look for patients by name, client name and number of days since a patient was last seen. To do a simple search by patient name:

- Select **Patient Name** from the **By** menu.
- In the Name, Client, N Days field, enter the full or partial Patient name in the **Patient Name** field to search for a patient based on their name.

This search will find all patients whose name is, or begins with, the name you type. The search will find both living and deceased patients with the entered name. You can also add the last name of the Client who owns this patient by listing it after the name with a comma. For example, to find a patient “Buddy” owned by Oliver Jones, you would type “Buddy, Jones”.

Search by Patient Name and Number of Days Since Last Seen

The search by Patient Name lets you look for patients by name, but you can narrow the search by adding client name and number of days since a patient was last seen to the patient search. This will help you distinguish between patients who may have the same name by adding in the number of days since a patient was last seen (based on MRE history). For example, "Fluffy,,7" means find all pets named Fluffy that have an MRE within the past 7 days. To do a search by patient name, client name and last seen:

- Select **Patient Name** from the **By** menu.
- In the **Name, Client, N Days** field, enter the search information you want in the following format: Patient Name,Client Last Name,Number of Days.

Search By Recall Dates

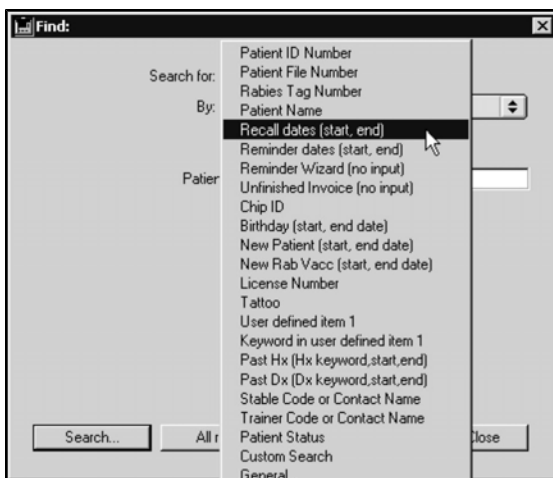
This search finds patients who are due for recalls during the specified dates (inclusive). Select **Recall Dates (Start, End)** from the **By** menu, to search for a patient based on recall dates. Type a Start Date and End date in the **Date Range** field. Separate dates with a comma. For example, typing "3/1/12, 3/2/12" would find all patients due for a recall on March 1, 2012 or March 2, 2012. To search for a single day, type the single date (ie. 3/1/12,3/1/12). By default, DVMAX will suggest the current date when searching. When searching on a Friday, the system will include Saturday's date. When searching on a Monday, the system will include Sunday's date.

You can see a report of all Recalls that are due at any given time. You can either work with this list on the screen, or print it out.

Viewing a List of Recalls by Date

To see a list of current Recalls:

- From the **Find** dialog, choose **Patients** from the **Search By** drop-down list.
- Choose **Recall Dates (Start, End)** from the **By** drop-down list.



- If necessary, edit the start and end dates into the **Enter Date Range** field. DVMAX inserts the current date as both the start and end date by default.
- If applicable, choose a site from the **Site** drop-down list.

- Click **Search**.
- A **Patient List** window will display containing a list of Patients with recalls due on the date(s) specified.

STS	File #	Name	Sex	Species - Breed	Owner name	Telephone
AC		Chester	Fem	Canine-GolRet	Mr Andrew Hartlen	800-877-9221
IH		Popeye3	% FS	Porcir-Cantonese	Capt. Bob Highliner	555-1212

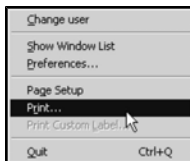
Buttons at the bottom: Show, Exclude, Search..., Close

- You can sort this list by Patient Status, File Number, or Owner Name by clicking on the appropriate column heading. Double-click a patient from the list to view the Recalls for that patient.

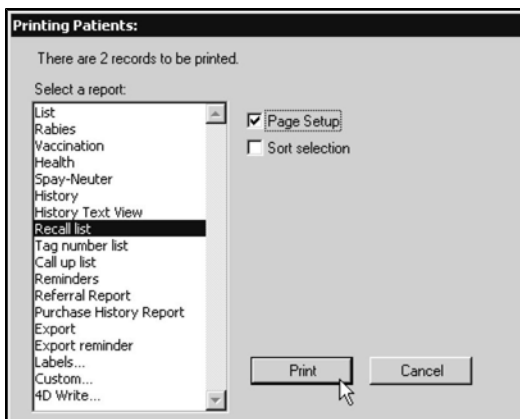
Print the Recall List

To print the recall list:

- Follow the directions on **Viewing a List of Recalls By Date** to generate a list of patients with recalls due on a specified date(s).
- While viewing the resulting Patient list, choose **Print** from the **File** drop-down menu.



- The **Printing Patients** dialog appears.



i By default, the list is sorted by Doctor Code, Patient Name. If you select **Sort Selection** in the printing dialog, then that sort order is used instead of the default sort order.

- Click to select **Recall List** from the list of available reports.
- Click **Print**. The **Recall List** report will print.

PATIENT RECALL LIST				
Printed: Wed, Feb 09, 2005 4:02 PM				
Pet Name	Owner	Hm phone	Bus. phone	Client File#
Chester	Mr Andrew Hartlen	800-877-9221		3314
Fem	Canine	Golden Retriever		
Last treated by: Test -- Ref by: Dr. Charles Acton / Laguna Hills Animal Hospital / Tel. 949-837-7333				
02/10/05 Sympathy Note to be sent.				
Notes: _____				
Popeye3	Capt. Bob Highliner	555-1212	123-4567	15
FS	Porcine (pigs)	Cantonese		
Last treated by: May N. Cooncat, D.V.M. -- Ref by: AAS Travel Clinic / / Tel.				
02/08/05 Time for Suture Removal, now day 14.				
Notes: _____				

Search By Reminder Dates

This search finds patients who are due for reminders during the specified dates (inclusive). Select **Reminder Dates (Start, End)** from the **By** menu, to search for a patient based on recall dates. Type a Start Date and End date in the **Date Range** field.

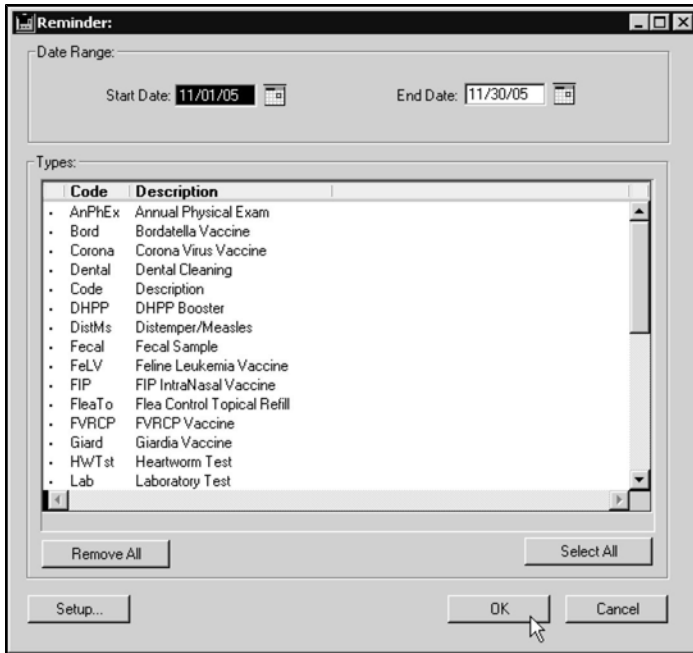
This search finds patients who are due for reminders during the specified dates (inclusive). Separate dates with a comma. For example, typing “3/1/12, 3/30/12” would find patients due for any reminder(s) during the month of March, 2012.

DVMAX will suggest the current month if it is before the 15th of the month, or the following month if it is after the 15th of the month. If you enter only a single date, DVMAX will search for all patients due between that date and the end of the entered month. The search will not include deceased patients or patients who belong to clients that have been marked as “inactive”.

You can print reminders quickly from the **Reminders** option under the **Section** menu on the DVMAX main screen.

Search By Reminder Wizard (No Input)

The **Reminder Wizard** search option will bring up the **Reminder Wizard** dialog. This dialog can also be accessed by choosing **Reminders** from the **Section** drop-down menu of the DVMAX main screen. See the **Reminders** chapter for more information on working with Reminders.



Search By Unfinished Invoice (No Input)

This search will show a list of all patients currently listed on unfinished invoices. This search requires no input.

Search By Unfinished Remote Invoice (No Input)

Use this search option to return a list of patients with unfinished invoices generated on remote stations. See the chapter **DVMAXSync** for more information.

Search By Chip ID

Use this search option to return a list of patients by their Chip ID (as entered on the patient record). This search will find patients whose Chip ID starts with the entered value.

Search By Birthday

Use this search option to return a list of patients with birthdates between the specified dates. Entering “3/1/97, 3/30/97” would find all living patients born during the month of March. This search does not take into account the year of birth, only the month and day.

i The Birthday search allows you to send Birthday cards to your patients.

Search By New Patient Date

Use this search option to return a list of new patients entered into DVMAX during the date range entered. For example, to find all new patients in the previous month, type the first and last days of that month.

Search New Rabies Vaccine Date

Use this search option to return a list of patients who have received rabies vaccines during the date range entered. This is helpful for county and state reporting.

Search By License Number

Use this search option to return a list of patients based on the license number entered on its record (typically a city, county, or state license number). This is an exact match search. If no information is entered for the search, DVMAX will return a list of all patients who have a License number in their records.

Search By Tattoo Number

Use this search option to return a list of patients based on the Tattoo number entered on its record. If no information is entered for the search, DVMAX will return a list of all patients who have a Tattoo number in their records.

Search By User Defined Label

The User Defined Label on the Patient record is defined under the User Settings tab of System Constants. Therefore, what appears in this field, located immediately below the Color field, will vary based on your DVMAX setup. Use this search option to return a list of patients based on the value of this User Defined Label field on the patient record. The contents of the field must begin with the letters you type in your search.

Search By Keyword in User Defined Label

The User Defined Label on the Patient record is defined under the User Settings tab of System Constants. Therefore, what appears in this field, located immediately below the Color field, will vary based on your DVMAX setup. Use this search option to return a list of patients based on the value of this User Defined Label field on the patient record. Your search term can appear anywhere in the field.

Search By MRE History (Past Hx)

This search option allows you to find all patients who have had an MRE or MREs placed on their history during a given period of time. To use this search, type a word or phrase that is part of the MRE you are searching for, and then the starting and ending dates for this search. The search will find all patients who have received an MRE containing the entered keyword during the time span given. If no dates are entered DVMAX will find all patients who have received the specified MRE. Entering an MRE code will not work for this search. This search uses the description field of the MRE. For example, if you want to find all patients who have received a Heartgard product during the past year, you would use "Heartgard" as the search term to find all treatments, regardless of the dosage given to the patient.

Search By Diagnosis History (Past Dx)

This search option allows you to find all patients who have received a diagnosis (or diagnoses) during a given period of time. To use this search, type a word or phrase that is part of the diagnosis you are searching for, and then the starting and ending dates for this search. This search is similar to the Past Hx search, but searches on Diagnosis entries from the Patient history.

Search By Stable Code or Contact Name

Use this search option to return a list of patients according to stable code. This option is only available if DVMAX is set up for an equine practice. These criteria search the appropriate field on the patient record for the criteria you provide.

Search By Trainer Code or Contact Name

Use this search option to return a list of patients according to trainer code or name. This option is only available if DVMAX is set up for an equine practice. These criteria search the appropriate field on the patient record for the criteria you provide.

Search By Patient Status

This option is generally used to identify those patients who are hospitalized (i.e. their status is “In Hospital”). Other possibilities are “Active”, “Deceased”, and “Inactive”.


You can also use the Hospital Census Report from **Section -> General Management** to generate a list of patients by owner, doctor and condition.

Search By Patient Status in Multi-Site (MPA) Environment

If you are working in a multi-site (MPA-enabled) environment, you will be able to search by Site as well. There will be a Site drop down menu in the search dialog that defaults to **Any**. Choosing a site will result in a list of animals whose status and location matches the criteria provided.

Search By Invoice Number

This search options returns patients named on the Invoice number you supply.

 If you have recently upgraded from DVMAX version 7.0.5 or earlier, you may have difficulty running this search. Contact DVMAX Technical Support for assistance.

Custom Search

The Custom search for patients allows you to create a very specific search based on multiple criteria (eg. a certain treatment given between 2/1/12 and 2/28/12).

General Search

Please see the **General Searches** chapter for more information.

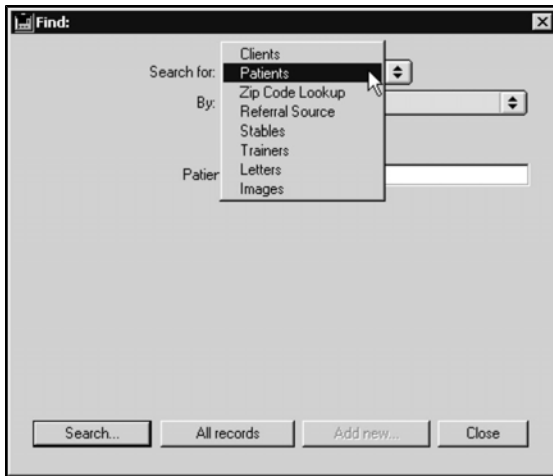
Listing All Patients

To list all Patients in DVMAX:

- Click **Patients** on the **Command Palette**.

-OR-

- Choose **Clients & Patients** from the **Section** drop-down menu.
- From the **Find** window, choose **Patients** from the **Search For** drop-down menu.



- Click **All Records** at the bottom of the **Find** window.
- The **Patient List** appears, containing a list of all Patients in DVMAX.

The Patient List

Each Patient in DVMAX is listed on an individual line, with columns for Status, File Number, Name, Sex/Gender, Species/Breed, Owner Name and Owner Telephone.

STS	ID	Name	Sex	Species - Breed	Owner name	Telephone
AC	8134	Elmer	Fem	Dog - MONGREL	Joyce Arnes	754-754-5394
AC	7765	Elroy	Male			
AC	7924	ertyu	Male			
AC	7725	Fawn's Dr. Peppurr	Male		Rebecca Batson	302-754-7036
AC	8062	Flaky	Fem	Canine -	Tracy Aaron	302-754-5815
AC	8067	Flippy	Mare		Mr Mikey Jarrison	
AC	8072	Fluffy	Mare		Mr. Richard Andrew	302-754-8857
AC	593	Fluffy	% MN	Feline - Abyssinian Mix	P. Greenman & K. Stecher	646-674-1210
AC	7613	Fluffy	FS	Feline - Domestic Short Hair		
AC	7779	Fluffy	Male			
AC	8106	Fluffy Blue	FS	Feline - Turkish Angora	Amy Calloway	302-846-0632
AC	20	Flush	FS	Rodent-Rat	Hon. Elizabeth Crown	
AC	8078	Forky	Mare		Karen Hulliger	302-754-5643
AC	8019	Frankie	Fem		Mr Tide	
AC	588	Fred	Fem		Mr Harry Potter	
AC	7984	Freddy	Mare		Mr Test11 Client11	
AC	8032	Frisky	% FS	Canine - Basset Hound	Betty Anthony	410-754-8147
AC	8148	Fuffi	Fem	Feline - Siamese	Dr. Arthur Bass	215-646-1446
AC	7710	Genghiskhan	Male			
AC	8081	Gentry	Fem	Canine -	Dr. Arthur Bass	215-646-1446

You can sort the **Patient List** by Status, File Number, Patient Name and Owner Name by clicking the appropriate column heading.

An Overview of the Patient Record

A Patient record contains a series of tabbed windows, accessed either through tabs at the top of the patient record window, or in some cases through the **Patients** drop-down menu.

General patient info for Baby - FS/10 Lbs/<unknown> (Tina & Dante Moravek):

General information | History | Notes | Attachments | Treatment Plans | Word Processing | DICOM Images

General Information:

ID: 4499 File:

Name:

Species:

Breed:

Sex: F M Spayed

DOB:

Color:

Show Name:

Weight: Lbs

Status:

Clinic Information:

Owner:

Last Visit:

Primary Provider:

Referred by #1:

Referred by #2:

Insurance Company:

Insurance #:

Additional Info:

Chip ID: Tattoo:

XRay: Lic #:

Rabies Tag #: Rabies producer: Lot:

Reminders / Recalls

Date	Reminder
11/2/2012	Bordetella

Date	Recall
------	--------

Reminder #: Reminder group:

The **General Information** tabbed window on a Patient Record contains vital statistics about a particular patient, information about the patient's owner and Doctor, as well as a list of Reminders and Recalls for the patient. The **General Information** window may also contain a picture of the patient.

The **History** tabbed window on a Patient Record stores Medical Record Entries and Diagnoses documenting the medical history of the patient at your clinic. Patient History can be updated manually, or automatically through invoicing.

The **Notes** tabbed window on a Patient Record has areas for entering and listing both Major Problems and more general information about a patient. Both areas of the Patient Notes tabbed window can be updated manually, or automatically through invoicing and/or Patient History updates.

The **Attachments** tabbed window on the Patient Record can store an image or document, medical or otherwise, to do with the patient. The **Attachments** tabbed window is typically used to provide a quick reference to diagnostic images.

The **Treatment Plans** tabbed window on the Patient Record lists any standard or customized Treatment Plans and associated To-do items for a patient.

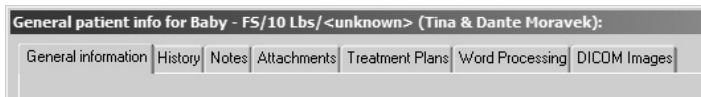
The **Word Processing** tabbed window on a Patient Record allows you to create documents – letters, reminder cards, custom certificates, etc. - based on information stored in other areas of the Patient record.

DICOM Images tabbed window lets you open and view DICOM images for the patient directly from the patient record. Note you can only view any available images once your system is configured. This tab may not be available depending on your system configuration. Contact Sneakers/DVMAX Technical Support for more information.

Switching Between Tabs on the Patient Record

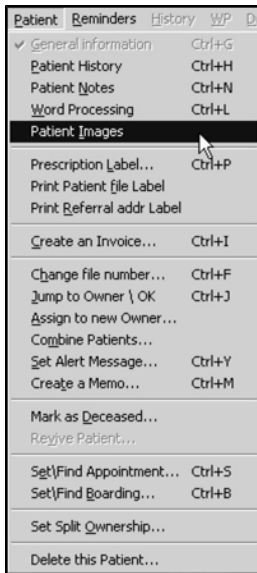
To switch between the different areas of a Patient Record:

- Click the tab corresponding to the window you wish to work with.



-OR-

- Choose the name of the window you wish to work with from the **Patients** drop-down menu.



Creating a New Patient Record

You must create a patient record from the record of the client who owns the patient. The following steps assume you are working with the Client who owns the Patient. For more information on Client records, see **Working with Client Records**.

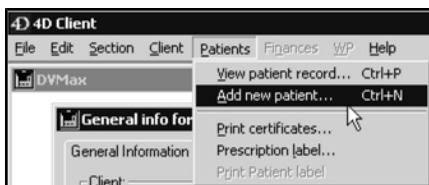
To add a new patient to a Client Record:

- Double-click in an empty area of the Patient list (in the lower left corner of the **Client General Information** window).



-OR-

- Choose **Add New Patient** from the **Patient** drop-down menu on the **Client** record.



i CONTROL+N (COMMAND+N on Macintosh) is a keyboard shortcut for **Add New Patient**.

- A new Patient **General Information** window appears, with the title “General Info for <New Patient> (<Owner Name>)”, where <Owner Name> is the name of the Patient’s owners.

Entering General Patient Information

To create a Patient record, you must at least provide a Patient name.

To fill out other general Patient information:

- If necessary, type a **File Number** for this patient into the **File** field. A file number can be anything you require to match any existing filing system you may have at your practice.
- Type the Patient’s name into the **Name** field.

i A setting in System Constants determines whether you begin inputting data with the patient’s name or file number. See **System Constants that Affect the Patient Record** for more information.

- Click the magnifying glass beside the **Species** field to select the species of this patient. The species must be defined with a valid Species code. See **Species Records** for more information.
- Click the magnifying glass beside the **Breed** field to select the breed of this patient. The breed must be defined with a valid Breed code. See **Breed Records** for more information.

i If you cannot remember the Species or Breed Code, type as much as you can remember and press the **Tab** key. DVMAX will show you a pick list of codes based on what you typed.

- Click to select radio button corresponding to the sex of the patient.
- If applicable, click to select the **Spayed** or **Neutered** checkbox.

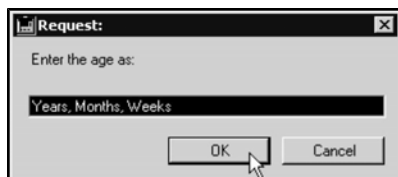
! The exact language of the gender buttons and the “Spayed” and “Neutered” checkboxes varies depending on the species of a particular patient.

- Type the patient’s Date of Birth into the **DOB** field.

i You can click the Calendar button to choose a patient’s date of birth from a calendar.



i You can click the Calculator button and type the patient’s current age in years, months and days, and DVMAX will calculate the date of birth for you.



- Type the patient’s color, if applicable, into the **Color** field.
- If applicable, type a value into the **User Defined** field. The label for this field, located immediately below the **Color** field, is determined under **System Constants**.

! The **Item 1** field is a user-defined field determined under System Constants field and may contain any kind of information that is useful to your practice. See **The User-Defined Field** for more information.

- If known, type the patient’s weight into the **Weight** field. If necessary, click to select the proper weight units from the drop-down list beside the **Weight** field.

i A setting in System Constants determines the default unit DVMAX uses for weight measures. See System Constants that Affect the Patient Record for more information.

i Holding down the <Option-Alt> key while clicking on the weight units menu will convert the weight from lbs to kilograms. For example, if you enter 75 in the Weight field, hold down <Option-Alt> and select Kg from the Weights menu, the weight will be converted from lbs to kilograms.

- If necessary, change the patient's status from **Active** to **In Hospital** by clicking the **Status** drop-down list. See **Patient Hospitalization Status** for more information.
- The **Visits** button in the Patient record lets you view patient appointment details, including Visit Reason and any status changes (as tracked from the appointment using Check In and Status drop-down menus).

Change the Patient File Number

To change the patient file number, select **Change File Number** from the **Patient** drop down menu. In the field provided on the Request dialog, type a new file number and click **OK** to save the new file number.

Set an Alert for a Patient Record

A patient **Alert** is a notice that pops up below the Command Palette when the record is opened. The alert will also display on the Boarding dialog when you create a boarding record for the patient. To create or edit an alert:

- From the **Patient** drop-down menu, select **Set Alert Message**.
- From the **Alert** dialog, type your note. Be sure to keep it brief, as space is limited, and the Alert should be easy to read at a glance.
- Click **OK** to save the Alert.
- If you already have an Alert for the patient, when you select **Set Alert Message** you can click **Edit** to adjust the note.
-

Create a Memo for the Patient Record

A patient **Memo** is a notice that pops up on the patient record whenever the record is opened after the date and time specified in the Memo. To create or edit a Memo:

- From the **Patient** drop-down menu, select **Create a Memo**.
- From the **Memo** dialog, type your note. Be sure to keep it brief, as the Memo should be quick and easy to read at a glance.
- Specify a **Due After** date and time.
- Click **OK** to save the Memo.
- If you already have an Memo for the patient, when you select **Create a Memo** you can simply adjust the note as needed.

Saving a New Patient Record

To save a new Patient record:

- Click **OK** to save this Patient record and return to the client (owner) record.

-OR-

- Click **OK & Next Patient** to create another Patient record for the same client.

VetLab Census Data and New Patient Records

The VetLab button on the Patient General Info tab lets you send patient census data to the VetLab Station Network, when DVMAX is configured to work with a VetLab Station Network.

If you plan to send census data from DVMAX to the VetLab Station, the patient record must first be saved. You cannot send census data to the VetLab Station for a new patient record until it has been saved.

About the Patient General Information Tab

The **General Information** tabbed window shows the patient's vital and clinical information, current status, and lists of Reminders and Recalls pertaining to the patient.

The General Information Area

For information on the General Information Area, see **Entering General Patient Information** in **Creating a New Patient Record**.

VetLab Button and VetLab Status Information

The VetLab button on the Patient General Info tab lets you send census details to, or remove patient census information from, the VetLab Station Network connected to the terminal. Beside the button is the VetLab status field. This field will show Active (if census data has been sent), Pending or Deleted (if census data has been deleted), and may occasionally display an error condition information message from the VetLab, if applicable.

To send or remove a patient from the VetLab census list:

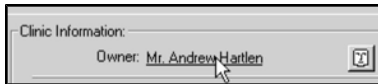
- Click the **VetLab** button.
- A Confirm dialog will display asking if you want to **Add/Update** or **Delete** the patient from the VetLab census list.
- Click Add/Update to send census data to the VetLab Station Network
- Click Delete to remove a patient from the census list.

The Clinic Information Area

The Clinic Information area of the General Information window lists the client who owns the patient, the date of the patient's last visit to your clinic, the patient's preferred doctor, and the patient's referral source(s). You can also print client and referral source address labels from the Clinic Information area.

Showing a Patient's Owner (Client) Information

To see a quick overview of a patient's owner information while viewing a patient record:



- Click once on the underlined owner's name in the **Clinic Information** area.

-OR-

- Click the face icon beside the owner's name.
- The **Owner Info** floating window appears.



- The **Owner Info** floating window lists the Client name(s), File and ID numbers, home and work telephone numbers, current balances and year-to-date spending, and any alerts notes or comments about this client. For more information on all these items, see **Working with Client Records**.

Jump to Owner

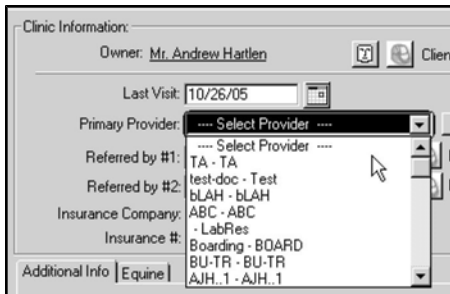
To quickly save and close the patient record and go to the Client (Owner) record, select **Jump to Owner/OK** from the **Patient** drop-down menu.

Setting a Patient's Primary Provider

You can choose the doctor or provider who will appear by default on a patient's invoices, prescription labels, and certificates.

To set the Primary Provider for a patient:

- Choose a provider from the **Primary Provider** drop-down list in the Clinic Information area of the Patient General Information window.



! In order to appear in the **Primary Provider** drop-down list, a Staff member must have the **Provider** setting selected in the **Staff** record. The **Doctor** setting in the Staff record need not be selected.

Setting a Patient's Referral Source

DVMAX allows you to keep track of how patients are referred to your practice. Referrals can come from other practitioners, from marketing sources, or from other clients.

Specialty and emergency practices can keep track of the colleagues who refer patients, and general practices can record the source of new patients.

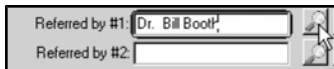
For more information, see **Referral Sources**.

! In order to set a Referral Source for a patient, the source must already be defined. See Referral Sources for information on setting up Referral Source records.

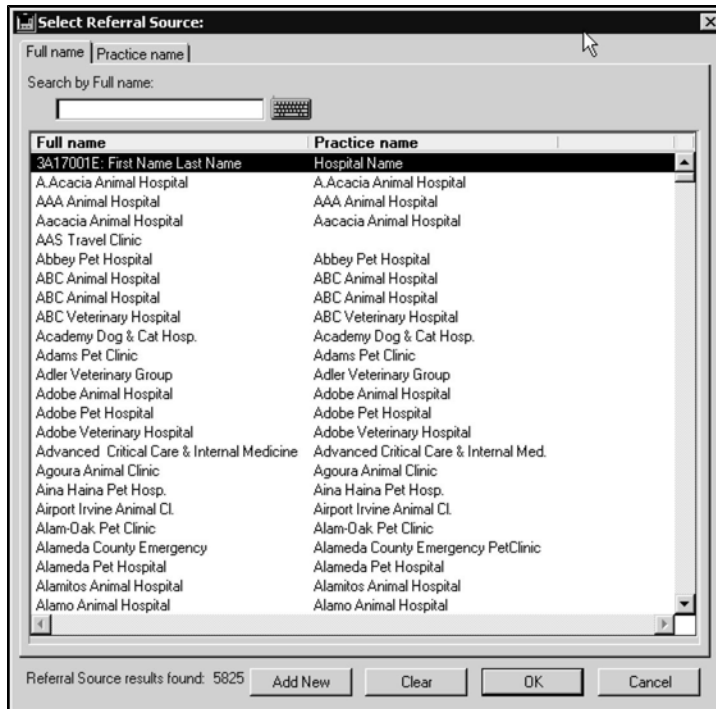
You can specify up to two referral sources for each patient.

To specify a patient's referral source:

- Click the magnifying glass beside a **Referred By:** field (#1 or #2).



- The **Select Referral Source** window appears.



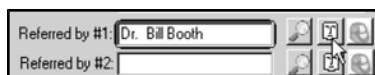
- Click the **Practice Name** tag if you wish to search Referral Sources by Practice Name rather than by the default, **Full Name**.
- Type the first few characters of the referral source’s name into the **Search By** field at the top of the **Select Referral Source** window. This will narrow the list of referral sources shown.
- Click to select the referral source you wish to use.
- Click **OK**.

i You may be able to set the referral source to one of your practice’s clients. Whether you can set the referral source to another client is controlled by the **Allow Referrals By Other Clients** setting of the **Client & Patient Settings** of System Constants. If this setting is enabled, you can set a patient’s referral source to a client of your practice by typing “Client Referral” into the Search By field and clicking OK. This will produce a list of clients in your practice from which you can choose using techniques similar to those outlined above.

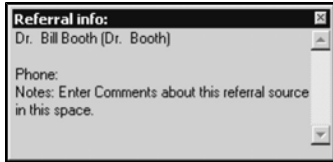
Showing Information About a Patient’s Referral Source

To see a quick summary of a patient’s referral sources:

- Click a **Referral Info** button to the right of either **Referred By** field.

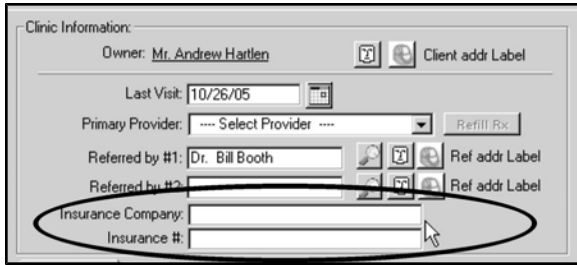


- The Referral Info floating window appears, containing a summary of the patient’s referral source.



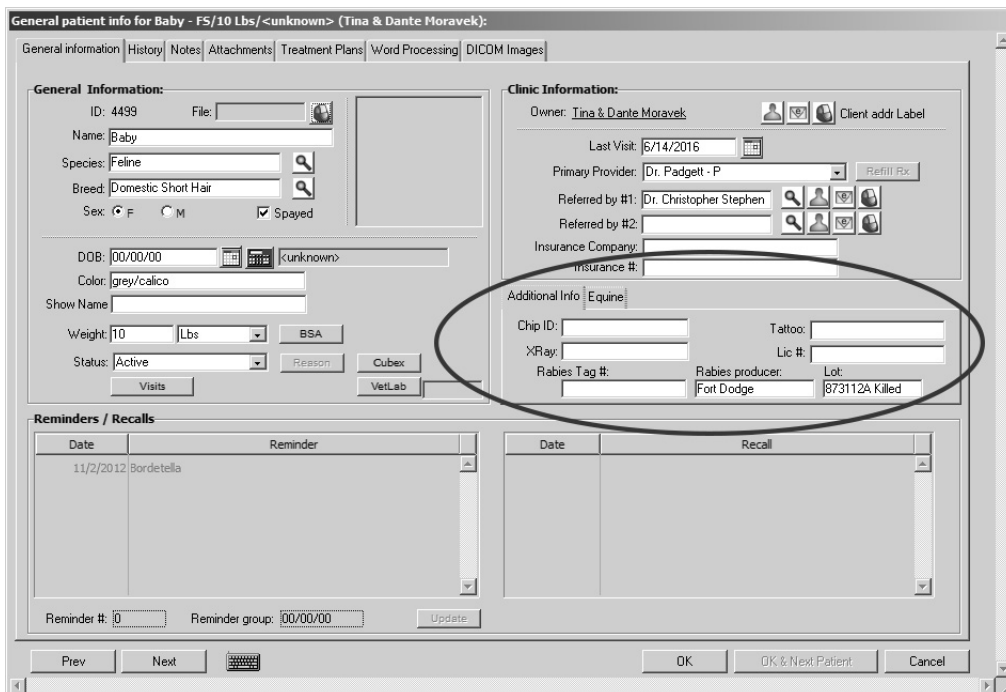
Patient Insurance Company and Policy Number

You can store a patient's Insurance Company and Policy Number in the appropriate fields in the Clinic Information area.



The Additional Info Area

The Additional Info area of the General Information window allows you to enter Chip ID, Tattoo, X-Ray file number and License information for a patient. You can also enter rabies-related information in this area.



Entering a Chip ID

To record a Chip ID number for a patient:

- Type the Chip ID number in the **Chip ID** field in the **Additional Info** area of the **General Information** window.

Entering a Tattoo Number

To record a Tattoo number for a patient:

- Type the Tattoo number in the **Tattoo** field in the **Additional Info** area of the **General Information** window.

Entering an X-Ray or Radiograph File Number

To record an X-Ray or Radiograph File number for a patient:

- Type the file number in the **X-Ray** field in the **Additional Info** area of the **General Information** window.

Entering a License Number


To record a city, county or other municipal license number for a patient:

- Type the License number in the **Lic #** field in the **Additional Info** area of the **General Information** window.

Printing Labels From the Patient Record

You can print the following labels from the General Information window of a patient record:

- Client Address Label
- Referral Source Address Label(s)
- Patient File Labels
- Prescription Labels

 In order to print labels from DVMAX, a properly configured label printer must be available. See Setup Label Printers for more information.

Printing a Client Address Label

To print a client address label from the General Information window of a patient record:

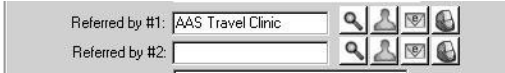
- Click the **Client Addr Label** button in the **Clinic Information** area.



Printing a Referral Source Address Label

To print a referral source address label from the General Information window of a patient record:

- Click the **Referral Address Label** button beside the Referral Source for which you wish to print a label.



i Choosing **Print Referral Addr Label** from the **Patient** drop-down menu will print an address label for the first Referral Source for a patient.

Printing a Patient File Label

To print a file label for a patient:

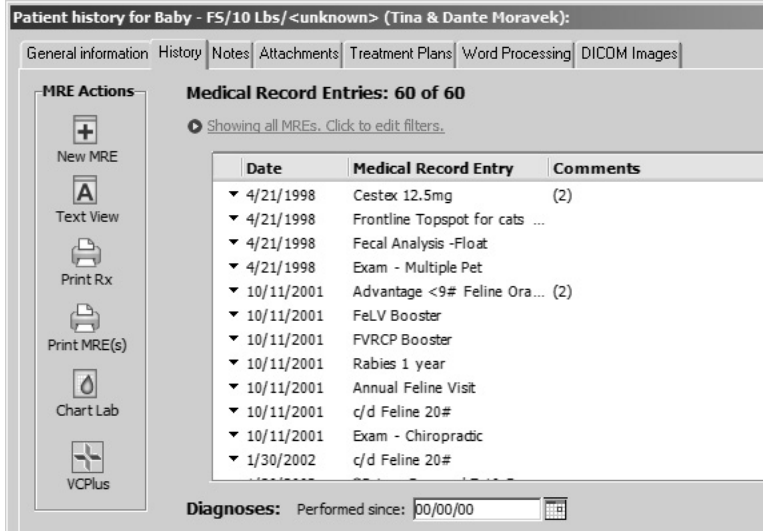
- Choose **Print Patient File Label** from the **Patient** drop-down menu.



Printing a Prescription Label

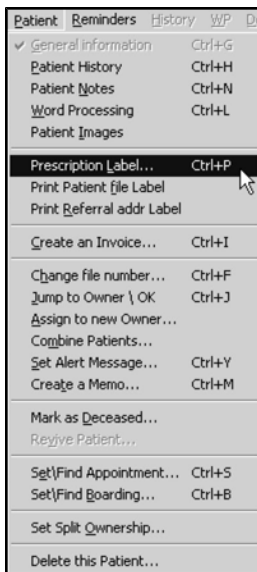
To print a prescription label for a patient:

- Click the **Print Rx** button on the Patient History window.

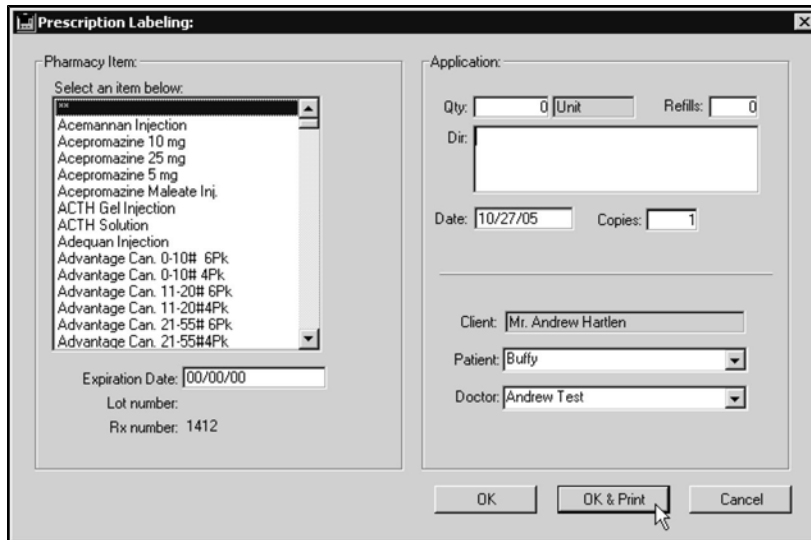


-OR-

- Choose **Prescription Label** from the **Patient** drop-down menu.



- The **Prescription Labeling** window displays.



- Complete the **Prescription Labeling** window and click **OK & Print** to print the label. For information on the **Prescription Labeling** window, see **Prescriptions and Refills**.

i CONTROL+P (COMMAND+P on Macintosh) is a keyboard shortcut for **Prescription Label**.

Create an Invoice from a Patient Record

For information on invoicing, see **Patient History and Invisible Invoicing** and refer to the chapter on **Invoicing** in this user guide.

Patient History

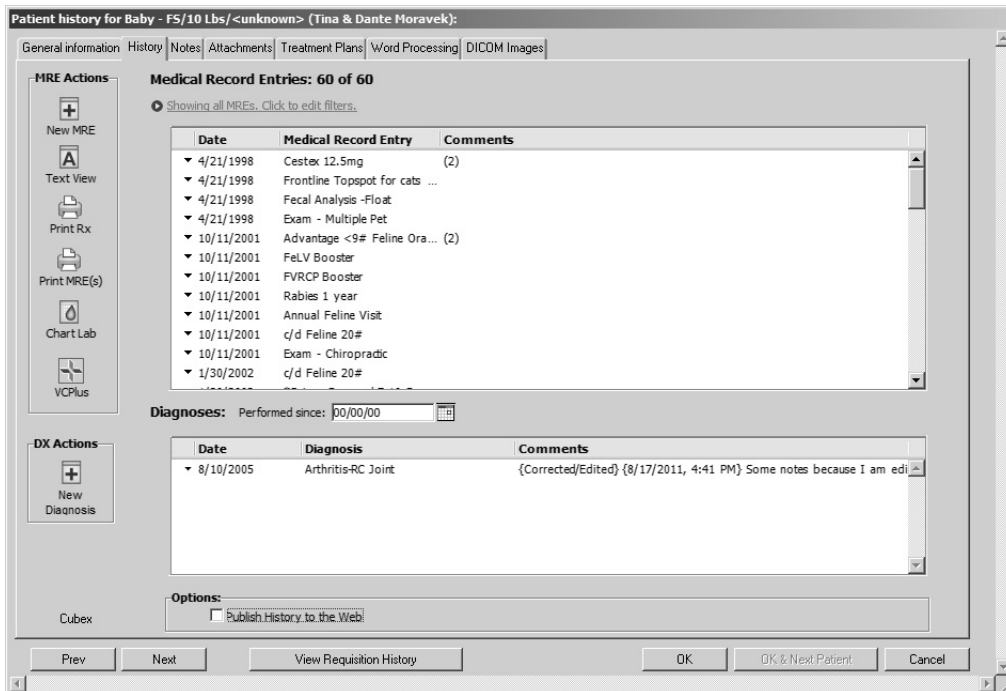
The Patient History window lists a patient's medical history, consisting of Medical Record Entries and Diagnoses. From the Patient History window, you can add a Medical Record Entry or Diagnosis to the Patient History, chart lab results, and view and print the complete medical history of the patient.

Patient History can be updated manually, or automatically through invoicing.

For more information on Medical Record Entries and Diagnoses, see their respective chapters in this reference.

Patient History

The Patient History window is divided into two main sections: Medical Record Entries (MREs) are listed in the top half of the window, and Diagnoses are listed in the bottom half of the window.



i The **History Preference** setting in the **Client & Patient Settings** section of **System Constants** controls the order of the MRE and Diagnosis lists. The lists may be ordered with the oldest entries first, or vice-versa.

Viewing the Requisition History

To view a list of requisitions for this patient, click **View Requisition History**. A list of open requisitions will display. If there are no open requisitions for this patient, a message displays indicating no records were found.

Filtering the List of Medical Record Entries

See the **MRE Filtering** chapter for detailed information about filtering the list of MREs in the patient history.

Filtering the List of Diagnoses

DVMAX allows you to filter the Diagnosis list to those entries performed after a specified date. This is useful when a patient has lengthy list of Diagnoses and you want to focus on recent entries.

To filter Patient Diagnoses by date:

- Click the Calendar beside the **Performed Since** field in the **Diagnoses** area of the **Patient History** tab.



- The Calendar appears. Select a date from the calendar to serve as the earliest date in the Diagnoses list.



- Click **OK** in the Calendar to filter the lists and return to the **Patient History** tab.

-OR-

- Click **Cancel** in the Calendar to return to the **Patient History** tab and leave the lists unfiltered.

i If the Diagnosis list seems incomplete, check the date in the **Performed Since** field to make sure older entries are not filtered out, and adjust the date if necessary.

Patient History and Invisible Invoicing

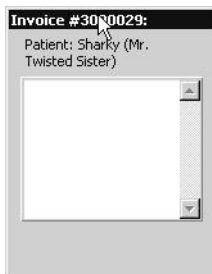
Invisible Invoicing refers to DVMAX's ability to automatically create an invoice from changes you make to a Patient's history. This is the exact reverse of updating the patient's history with items entered on an Invoice (see the **Invoices and Patient Histories** section of the **Invoicing** section of this reference for more information on this).

Invisible Invoicing works by monitoring changes you make to the Patient History. When you first open a Patient History, DVMAX can create an invoice in the background. This is the "invisible invoice." When you add a Medical Record Entry linked to a billable item to the Patient History, DVMAX adds this item to the invisible invoice.

You can stop the Invisible Invoicing process at any time while working on the Patient record to convert it to a standard invoice.

The Invisible Invoice Window

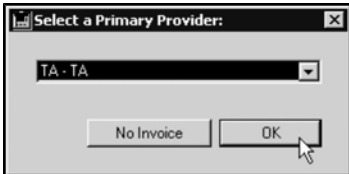
When DVMAX has started an Invisible Invoice, a small Invisible Invoice window will appear. The title of the Invisible Invoice window is a unique invoice number generated by DVMAX.



DVMAX is ready to record the changes you make on the **Patient History** tab to the Invisible Invoice.

Automatic Invisible Invoicing

With the **Automatic Invisible InvoiceSystem Constant** turned on, DVMAX will open an invisible invoice window every time you open a Patient's history. You will be asked to select a default provider for the Invisible Invoice when you open the **Patient History** tab.



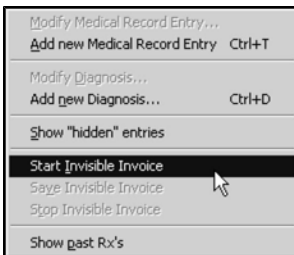
See the **System Constants That Affect The Patient Record** for instructions on how to turn on the **Automatic Invisible Invoice** setting.

i If you are using Invisible Invoicing frequently, you should set DVMAX to start an invisible invoice automatically. This will save time and prevent you from making changes to the Patient History before you remember to start an Invisible Invoice.

Telling DVMAX to Start an Invisible Invoice

You can tell DVMAX to start an Invisible Invoice at any time while you are working on the **Patient History**. To tell DVMAX to start an Invisible Invoice:

- Choose **Start Invisible Invoice** from the **History** drop-down menu.

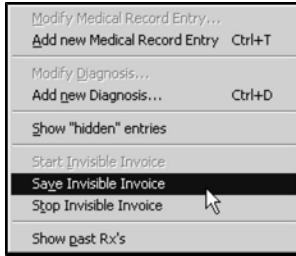


Saving an Invisible Invoice

DVMAX saves the Invisible Invoice automatically when you leave or close the **Patient History** tab. The Invisible Invoice is saved as an unfinished invoice on the Client's **Finances** tab.

You can also save an Invisible Invoice at any time while on the **Patient History** tab. To save an Invisible Invoice without exiting Patient History:

- Choose **Save Invisible Invoice** from the **History** drop-down menu.



- You will see the message “Closing and Saving” appear as the Invisible Invoice window’s status message. When the Invisible Invoice window disappears, the Invisible Invoice has been successfully saved as an unfinished invoice on the client’s Finances window. Any further changes you make to the Patient’s history will **not** be reflected on the Invisible Invoice.

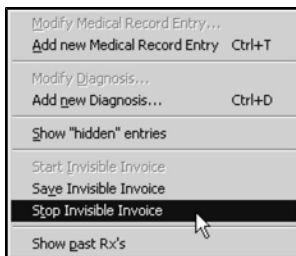
! When DVMAX saves an Invisible Invoice, it does not post the invoice to your financial records. Your inventory will not be updated, nor will the client’s balance owing. In order to post the invoice to the client’s actual financial records, you must complete the unfinished invoice and actually bill the client.

For information on working with unfinished invoices in DVMAX, see **Working With Unfinished Invoices** in the **Invoices** section of this reference.

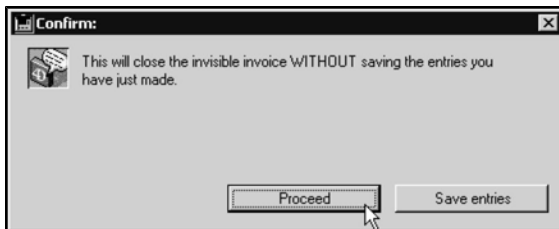
Canceling an Invisible Invoice

To cancel an Invisible Invoice:

- Choose **Stop Invisible Invoice** from the **History** drop-down menu.




- DVMAX will ask you to confirm that you wish to cancel the Invisible Invoice.



- Click **Proceed** to cancel the Invisible Invoice without saving any changes you have made since the last time the Invisible Invoice was started.

–OR–

- Click **Save Entries** to save any changes you have made before canceling the Invisible Invoice (this is the equivalent of choosing **Save an Invisible Invoice**).

 It is not possible to stop an invisible invoice when Guaranteed Charge Capture is enabled from System Constants.

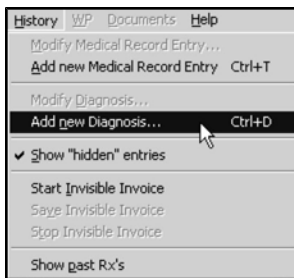
Adding a Diagnosis to the Patient History

To add a Diagnosis to a patient's medical history:

- Double-click in an empty area of the Diagnosis list on the Patient History window.

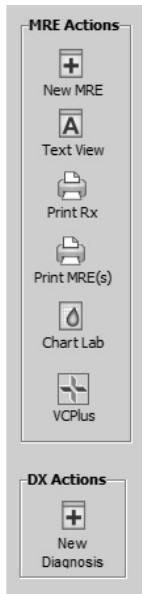
-OR-


- Choose **Add New Diagnosis** from the **History** drop-down menu.



-OR-

- Click the **Add New Diagnosis** button on the **Patient History** window.



 **CONTROL+D** (COMMAND+D on Macintosh) is a keyboard shortcut for **Add New Diagnosis**.

- The **Add New Diagnosis** window appears.

- Type a diagnosis code in the **Code** field in the **Add New Diagnosis** window.
- Depending on how the Diagnosis record was defined, there may be a linked external document (such as a LifeLearn document or an editable template) associated with the diagnosis code. This document can open as soon as you enter the diagnosis code or when you OK the diagnosis. See the chapter **Diagnoses** for more information.

i If you cannot remember the Code, type as much as you can remember in the **Code** field and press the **Tab** key. DVMAX will show you a pick list of codes based on what you typed.

- Choose the staff member or doctor making this diagnosis from the **Staff** drop-down list.
- The current data and time appear in the Date and Time fields. You can alter these if need be.
- If necessary, type any additional notes to the default diagnosis text that appears in the **Add New Diagnosis** window.
- Click to select the **Hide This Entry** checkbox if you do not wish this Diagnosis to appear in the Patient History window or to appear as part of the printed Patient History. See **Hiding Entries**.
- Click to select the **Do not include on WP documents** checkbox if you do not want this Diagnosis to be available for insertion on Word Processing documents dealing with this patient.
- Click the **Findings** button if you want to utilize DVMAX's preset Findings for this Diagnosis. See **Entering Findings** for more information on Findings.

! If the Findings button is grayed-out or unavailable, this means that no Finding Class has been associated with this Diagnosis. Not all Diagnoses have associated Finding Classes. See Findings for more information on setting up Finding Classes.

- Click **OK** to save this Diagnosis and return to the Patient History window.

-OR-

- Click **OK & Next** to save this diagnosis to the Patient History and enter another diagnosis.

-OR-

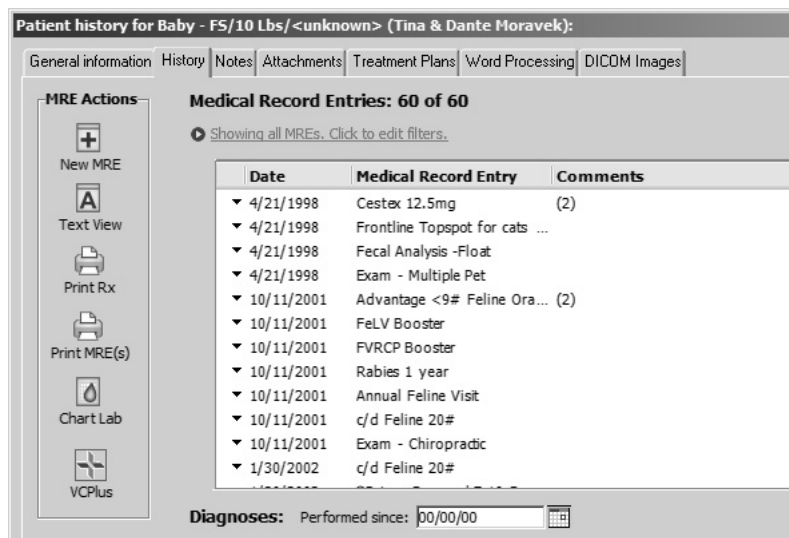
- Click **Cancel** to return to the Patient History window without adding the diagnosis.
-

Adding a Medical Record Entry to the Patient History

! A Medical Record Entry cannot be deleted once it has been created. Further, DVMAX locks a medical record entry 24 hours after it has been created. Text in a Medical Record Entry cannot be altered or deleted once the MRE has been locked, although additional comments (including Findings) can be added, and the **Hide This Entry**, **Exclude From Printed History** and **Exclude from Web** settings can be changed.

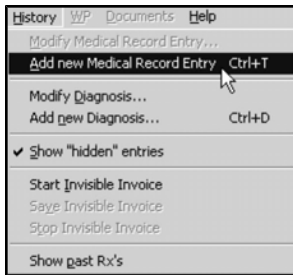
To add a Medical Record Entry (MRE) to a patient’s medical history:

- Click the **Add New MRE** button near the top right of the Patient History window.



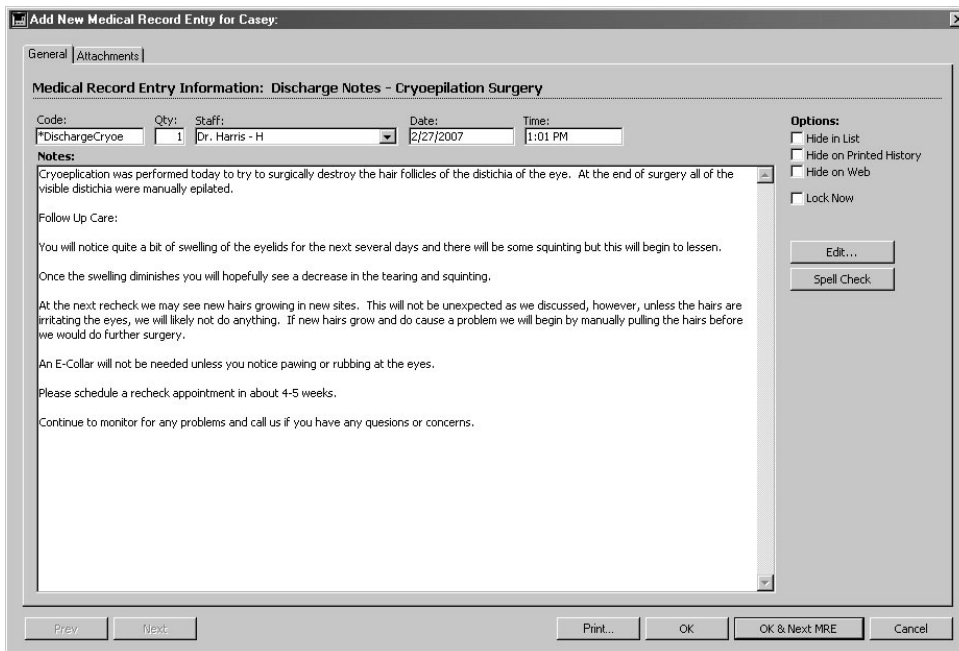
-OR-

- Choose **Add New Medical Record Entry** from the **History** drop-down menu.



i CONTROL+T (COMMAND+T on Macintosh) is a keyboard shortcut for **Add New Medical Record Entry**.

- The **Add New Medical Record Entry** window opens




- Type a Medical Record Code in the **Code** field in the **Add New Medical Record Entry** window.
- Depending on how the associated MRC was defined, there may be a linked external document (such as a LifeLearn document or an editable template) associated with the Code you entered. This document may launch as soon as you enter the MRC or when you OK the diagnosis. See the chapter **Medical Record Codes** for more information.


i If you cannot remember the diagnosis code, type as much as you can remember and press the **Tab** key. DVMAX will show you a pick list of codes based on what you typed.

i If you enter an invalid MRC into an MRE, DVMAX keeps the cursor in the Code field, instead of moving to the Qty field. As well, the invalid code is left in the field so it may be corrected.


- Enter the quantity for this Medical Record Code in the **Qty** field. If the MRE represents a service, the quantity will be 1. If the MRE represents a physical inventory item, enter the actual quantity dispensed or administered. Decimal quantities are permitted.
- Choose the staff member or doctor responsible for this MRE from the **Staff** drop-down list.
- The current data and time appear in the Date and Time fields. You can alter these if need be.
- If necessary, type any additional notes to any default text that appears in the **Add New Medical Record Entry** window.

 You can take advantage of DVMAX's Macro capability while working in Medical Record Entry text fields. See **Macros** for more information.

- Click to select the **Hide in List** checkbox if you do not wish this MRE to appear in the Patient History window or to appear as part of the printed Patient History. See **Hiding Entries**.
- Click to select the **Hide on Printed History** checkbox if you want this MRE to appear in the MRE list but not in the patient's printed medical history.
- Click to select the **Hide on Web** checkbox if you do not want this MRE to be published on the Internet. See **Web Patient Reporting** for more information.

 The **Hide on Web** checkbox will be selected and disabled if the MRE's underlying MRC has the **Exclude from Web** setting selected.

- Click the **Findings** button if you want to utilize DVMAX's preset Findings for this MRE. See **Entering Findings** for more information on Findings.

 If the Findings button is grayed-out or unavailable, this means that no Finding Class has been associated with this MRE. Not all MREs have associated Finding Classes. See **Findings** for more information on setting up Finding Classes.


- If necessary, click the **Attachments** tab to add associate documents or images with this MRE. See **Adding Images or Documents to Medical Record Entries** for more information.
- Click **OK** to save this MRE and return to the Patient History window.

-OR-

- Click **OK & New MRE** to save this MRE to the Patient History and enter another MRE. This button is only enabled if you are entering an MRE. Viewing an existing MRE will not enable the **OK & New MRE** button.

-OR-

- Click **Cancel** to return to the Patient History window without adding the MRE.

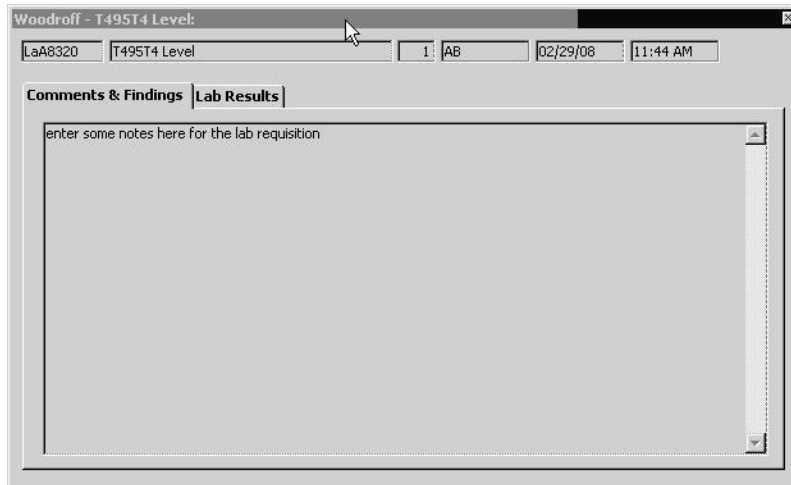
 You must save an MRE before you can print it. If the **Print** button on the MRE dialog is clicked before the MRE is saved, DVMAX will prompt you to save before printing. If you select

Yes from the dialog, DVMAX will save the MRE and then print. If you click **No**, DVMAX will not print the MRE(s).

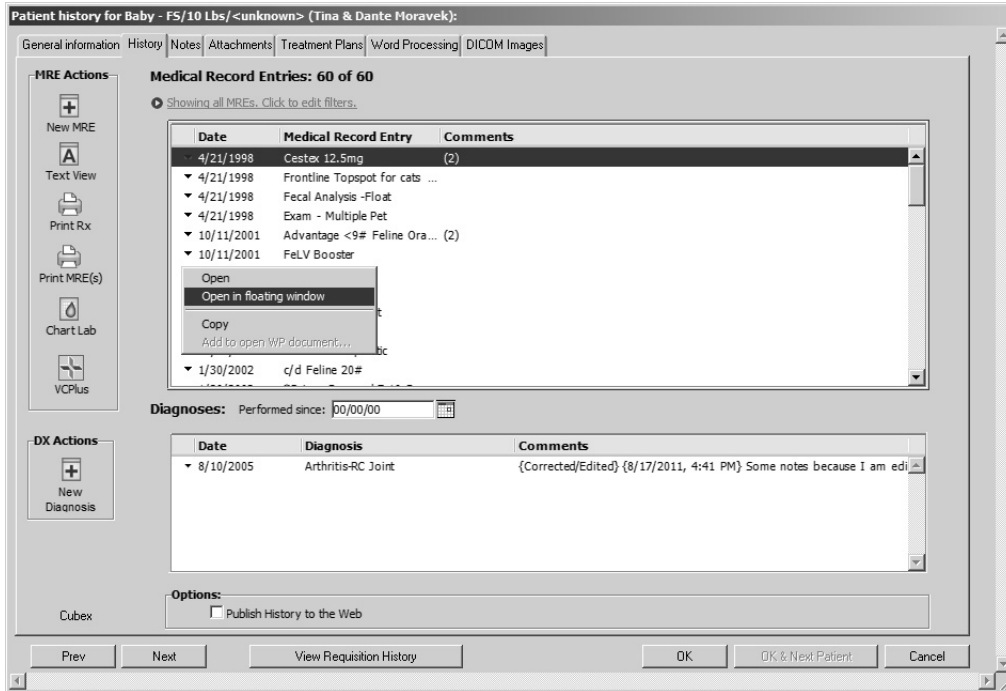
Displaying MREs and Diagnoses in Floating Windows

You can display MREs and Diagnoses in a floating window. To display:

- Press <Option/Alt> and double-click the MRE or Diagnosis.
- The comments and findings both display as text. If lab result MREs are present, then a Lab Results tab displays as well. The position and size of the window is saved restored.



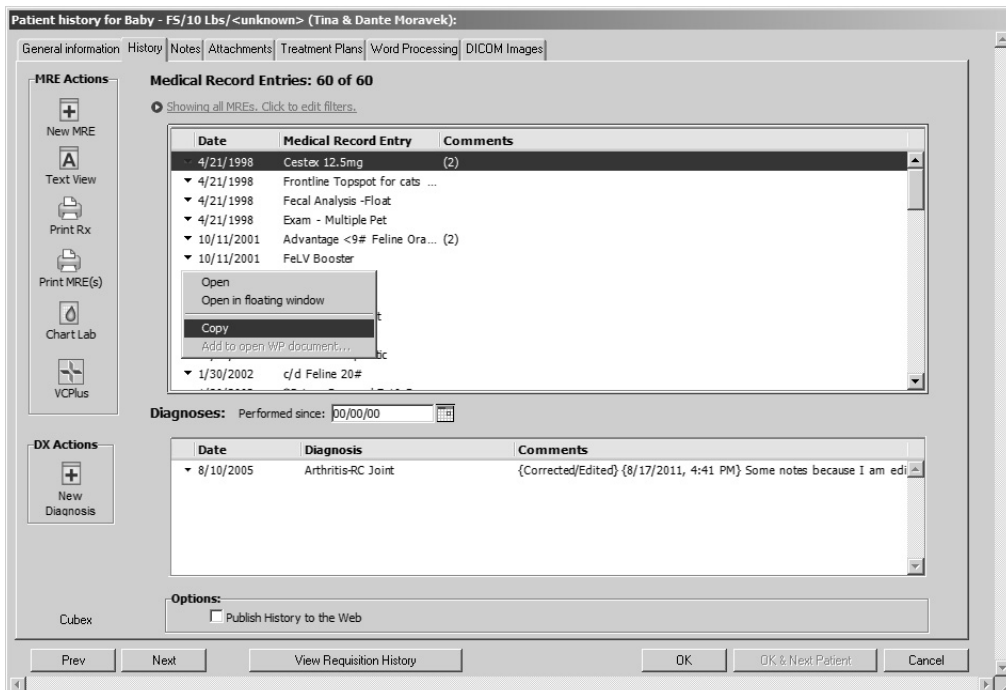
- Alternatively, you can click the small arrow immediately to the left of the MRE you wish to view, and an action menu displays. From that window, select **Open** or **Open in floating window**



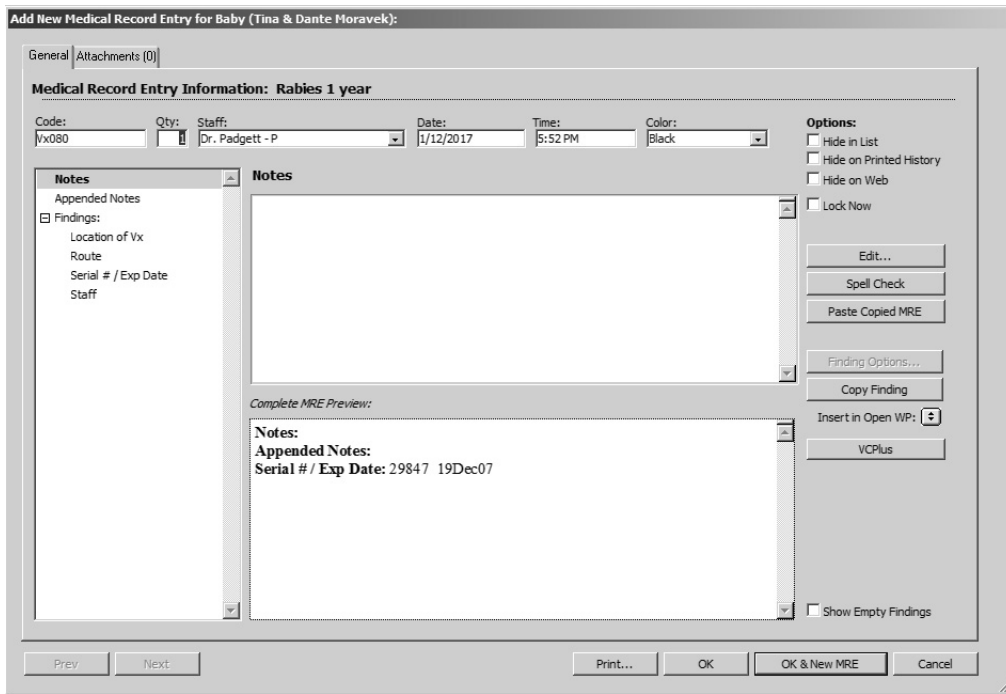
Copying MREs and Diagnoses

You can copy and paste MREs and Diagnoses either inside the same patient, or into a different patient.

- Select an MRE or diagnosis, and from the MRE action menu (the down arrow to the left of the MRE), select **Copy**.

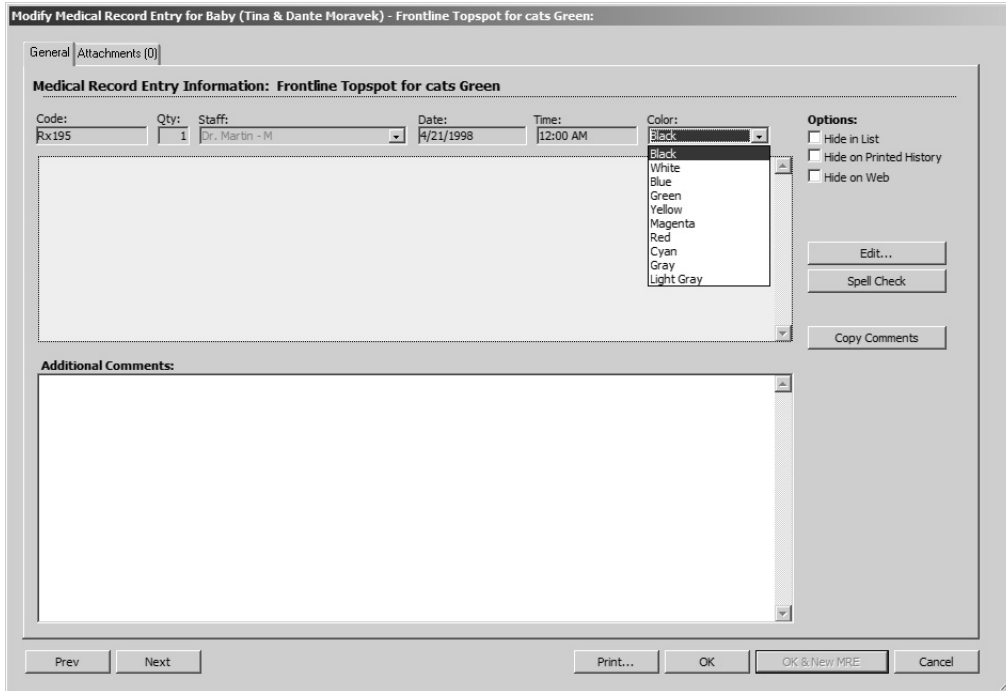


- Then click **New MRE** to add a new MRE. The Add New Medical Record Entry window opens. Click **Paste Copied MRE**. The MRE is pasted, complete with findings and comments.



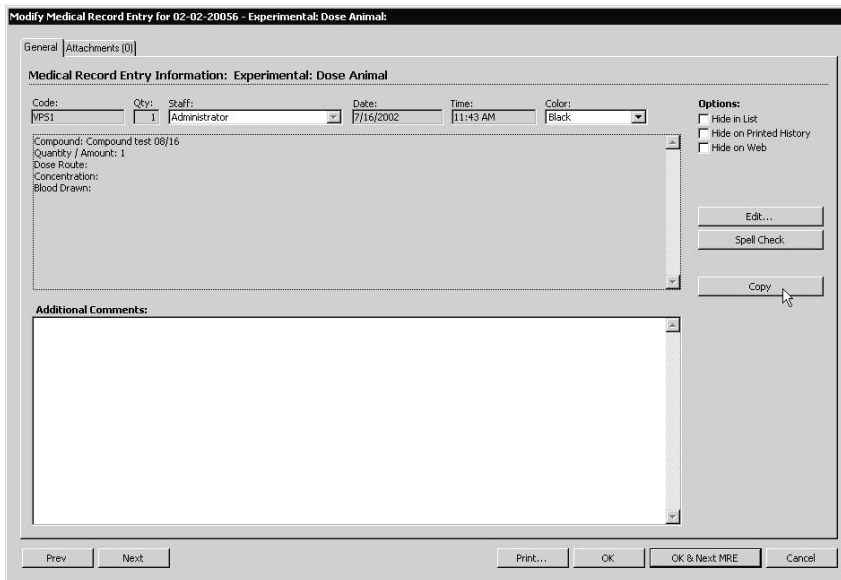
Assigning a Color to an MRE

You can assign a foreground or background color to an MRE. **Select a pre-defined color from the Color drop-down menu on the MRE input form to cause that row to be drawn in that color on the Patient listing page.**



Copying MRE Comments

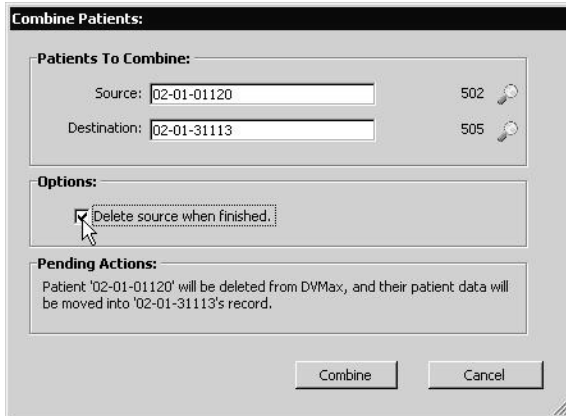
There is a **Copy** button available when you open the MRC or Diagnosis from the patient History tab. Click **Copy** to copy the contents of the Comments field to the system clipboard.





Combining Patients

You can combine data from two patients into a single record. With the patient record open, from the **Patients** menu, select **Combine Patients**. The Combine Patients dialog opens. Click the magnifying glass to open a pick list to select the **Destination** patient.

If you want to remove the original record after the patients have been combined, select the **Delete Source when finished** checkbox.



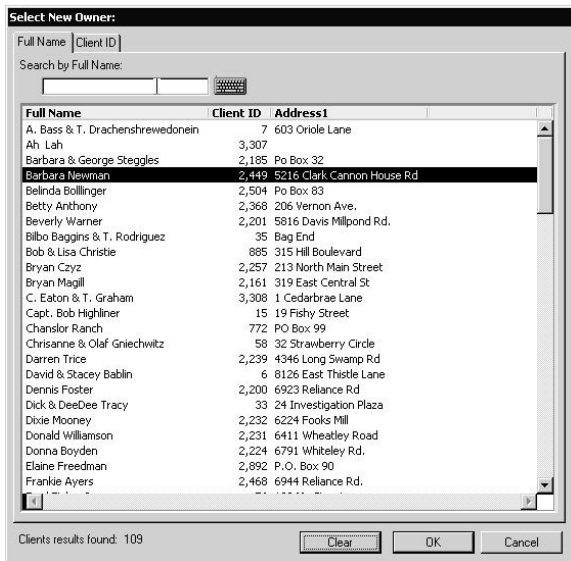
 DVMAX prevents you from combining patients when opening a patient from the client record. To combine patients, you must open the record directly.

 All invoices for both patients must be closed before patients can be combined.


Assigning a New Owner to a Patient

With the Patient record open, from the **Patient** menu, select **Assign to New Owner**. The Select New Owner dialog opens. You can search by **Full Name** or **Client ID**. Select the new owner, and click **OK**. A message indicates the transfer was successful.

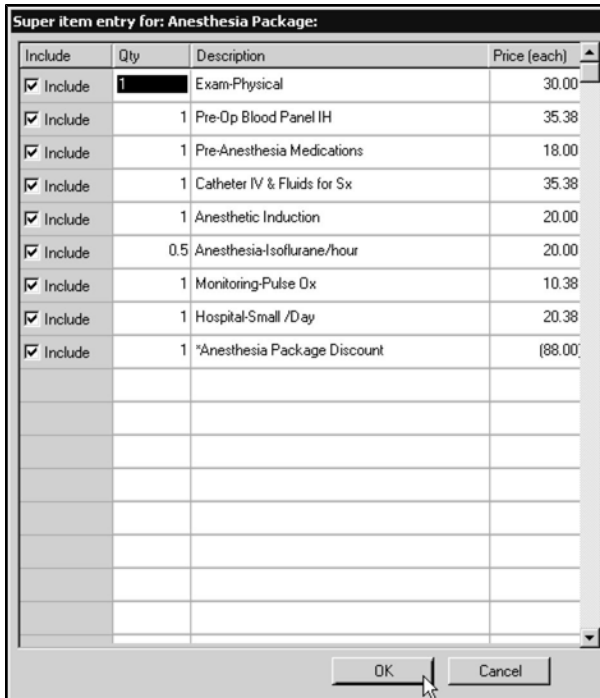
 You cannot assign a new owner to a patient with open invoices.



Medical Record Entries and Super Items

 An Invisible Invoice must be active in order for a Super Item window to appear when adding a Medical Record Code. See Patient History and Invisible Invoicing.

Some Medical Record Entries are linked to **Super Items**, meaning a group of related products or services. If the Medical Record Code you enter on a Medical Record Entry is linked to a Super Item, DVMAX will ask you to provide quantities and other information about the individual items that make up the Super Item:



Include	Qty	Description	Price (each)
<input checked="" type="checkbox"/>	1	Exam-Physical	30.00
<input checked="" type="checkbox"/>	1	Pre-Op Blood Panel IH	35.38
<input checked="" type="checkbox"/>	1	Pre-Anesthesia Medications	18.00
<input checked="" type="checkbox"/>	1	Catheter IV & Fluids for Sx	35.38
<input checked="" type="checkbox"/>	1	Anesthetic Induction	20.00
<input checked="" type="checkbox"/>	0.5	Anesthesia-Isolfurane/hour	20.00
<input checked="" type="checkbox"/>	1	Monitoring-Pulse O ₂	10.38
<input checked="" type="checkbox"/>	1	Hospital-Small /Day	20.38
<input checked="" type="checkbox"/>	1	*Anesthesia Package Discount	(88.00)


- Click to select the **Include** checkbox for every item you wish to include on the Invisible Invoice associated with the Medical Record Entry you are creating.
- Enter a Quantity for each item you are including on the Invisible Invoice.

When you finish entering information for the Super Item, click **OK**. DVMAX will place the items that make up the Super Item on individual lines on the Invisible Invoice.

See **Bill Items** for more information about Super Items.

Adding Images or Documents to Medical Record Entries

You can associate images – photographs, x-rays, ultrasound stills and more - or other documents with new or existing Medical Record Entries.

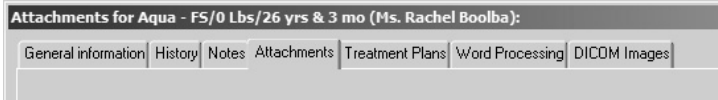
 DVMAX will automatically attach some images to automatically created MREs (see the **DVMAX PAC Link Integration** and **Lab Results** chapters for more information on automatically-attached images).

To attach a document or image file to a Medical Record Entry:

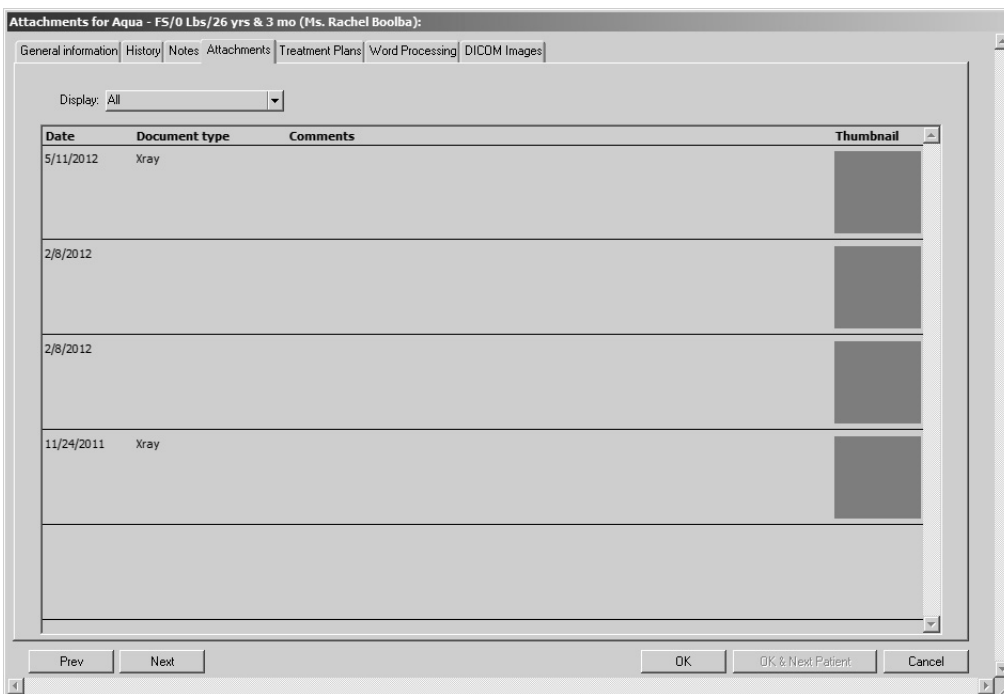
- Open a new Medical Record Entry, following the procedures in **Creating a New Medical Record Entry**.

-OR-

- Open an existing Medical Record Entry by double-clicking it in the MRE list on the Patient History window.
- Click the **Attachments** tab at the top of the MRE window.



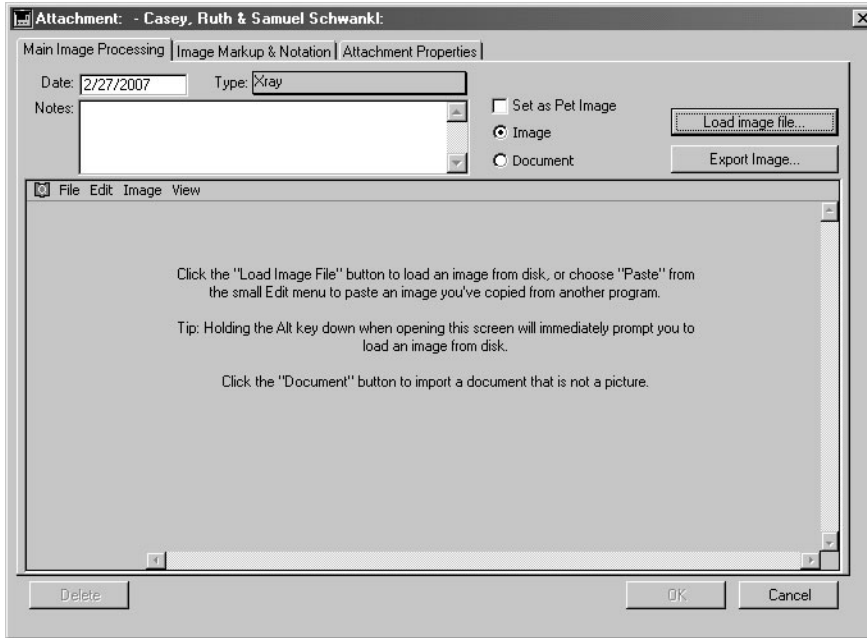
- The **Attachments List** appears. Double-click in an empty area of the **Attachments List**.



- DVMAX will present an **Attachment** window. Select the **Load image file** button to locate the file on your computer that you wish to associate with this Medical Record Entry.

-OR-

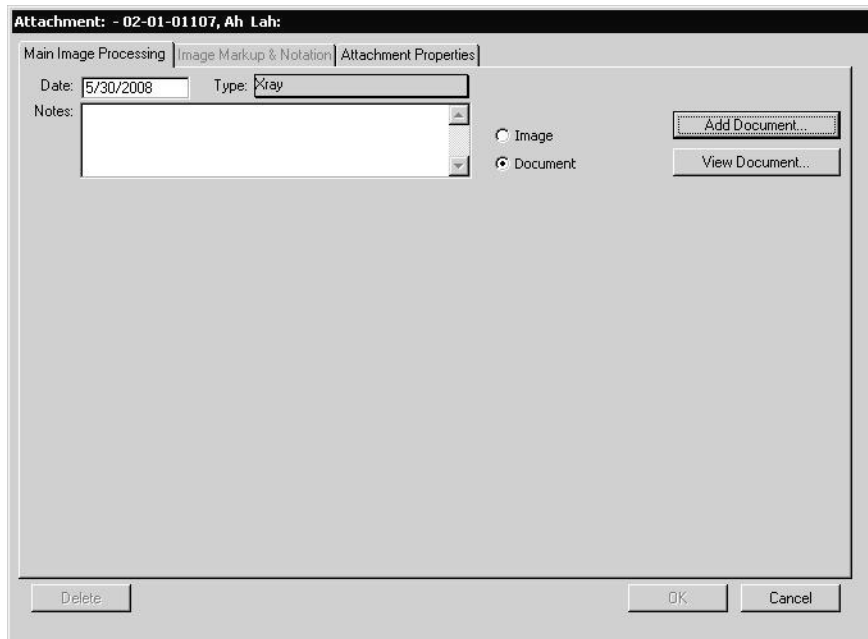
- Drag the image you wish to attach directly on to the attachments input window. DVMAX lets you drag a drop images from your system to the Image area of the open Attachment window.
- Indicate whether the file is a document or an image by clicking the appropriate radio button beside the **Notes** field.



- If necessary, change the date of this image from the current date in the **Date** field.
- If necessary, click to select the Image Type from the **Type** drop-down list.
- Enter any notes about this image in the **Notes** field.
- Click **OK** to save the image or document to the Medical Record Entry and return to the Documents list. The image or document will now appear in the Documents list.
- Click **OK** to close and save the Medical Record Entry.

To add a document as an attachment:

- In the Attachment dialog, select the **Document** radio button, and click **Add Document**. Locate the document you want to attach, and click **Open**.



Drag and Drop Images and Documents

DVMAX lets you use simple drag and drop functionality to attach images or documents to a patient file. From your system, find the image you wish to place in the patient record and drag the image from your system to the Image area of the **Main Image Processing** tab on the **Attachments** window.

Image Scaling

Use the Image Scaling feature to adjust the size of the displayed image when viewing the image from the Main Image Processing tab. Drag the slider to make the image larger or smaller. Image scaling does not affect the size of the image when viewed from the **Image Markup** tab.

Attachment Properties

The **Attachment Properties** tab under the Attachments window lets you see the image or document properties. In addition to details about attachment type and size, the Attachment Properties tab also indicates the origin of the attachment, when it was added and when it was last modified. These values are not editable.

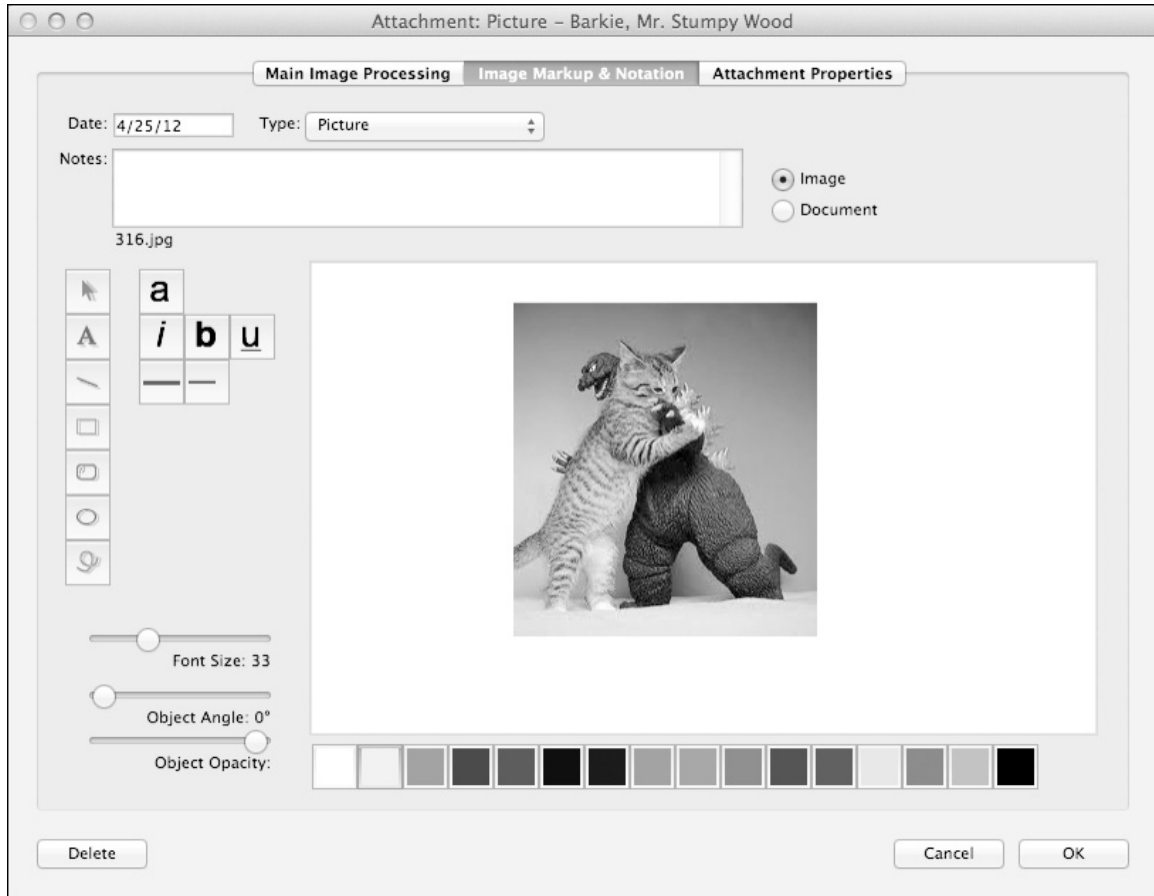
Image Markup & Notation

The Image Markup and Notation feature provides a full range of text and image editing tools that can be used to add detail to Patient images or added description to Patient diagnoses.

To markup an image:

- Select **Attachments** from the Patient record.
- The Attachments tab lists all of the Patient's documents, including images.

- Double click on the document row that includes the image requiring editing.
- The Attachment dialog opens. There are three tabs on the Attachment dialog - Main Image Processing, Image Markup & Notation and Attachment Properties.
- Select **Image Markup & Notation**.



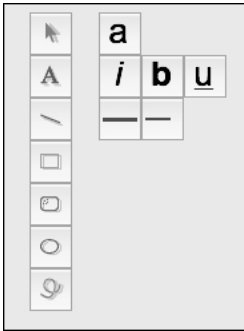
- The Image Markup & Notation dialog opens. Notation and markup options allow you to add notes, add text, add shapes, edit colors, select fonts, adjust size, and change angle and opacity.
- Edit the image as desired, then select **OK** to save the changes made.

Adding Text to the Image Markup Screen

The Image Markup and Notation dialog provides a full range of text editing options including size, color and styling.

To Add and Edit Text in the Markup window:

- Select the **Text tool** and drag a box on the screen where you would like text to appear.
- A Request window will appear. Type the text you want to appear in the text box and Select **OK**.
- Select the **Pointer** tool and click the text to move the text around the window.



- To change the **Font Size**, **Angle** and **Opacity**, use the slide tools on the left of the window.
- To change the Font, click the “a” button and select the font of choice.
- To add **Italics**, **Bold** and **Underline**, use the text editing buttons on the left of the screen.
- To change the **Color**, select the text with the **Pointer** tool and select a new color from the options at the bottom of the screen.

Adding Images to the Image Markup Screen

The Image Markup and Notation dialog provides a range of shape creation and editing options.

To Add Shapes to the image:

- Click the **Line**, **Square**, **Oval** or **Circle** tool and drag the shape onto the screen in the required location and to the required size.
- To adjust the position, select the shape with the **Pointer** tool and move the shape.
- To adjust the **Angle** or **Opacity** of the shape, use the slider tool on the left of the screen.
- To change the **Color**, select the shape with the **Pointer** tool and choose a new color from the options at the bottom of the screen.



Automated Image Import

DVMAX lets you attach images and other documents to a patient record as needed. It also has an auto-image import function that will automatically pull attachments into the appropriate patient record. This feature is enabled from the **Assorted Preferences** tab located under **Preferences**.

The Automated Image Import function works much like the automatic importing of lab results from the Lab Results functionality. The feature works with all file types. You set the folder where you want DVMAX to look for images and once you click to enable the functionality, DVMAX automatically checks the specified folder at regular intervals for images that need to be moved to patient records. The files have to be in a specific naming format

To enable Automated Image Importing:

- From the **File** menu on the DVMAX main screen, select **Preferences**.
- From the **Preferences** dialog, select the **Assorted Preferences** tab.
- Under **Assorted Preferences**, click **Select Folder** from the Image Auto-Import area.
- Select a folder to check for images. This cannot be the same folder as your DVMAX Images folder. If you try to select the same folder as the current DVMAX Images folder, you will be asked to make a different selection.
- After you have specified an Auto-Import folder, click Check Folder for Images to enable the auto-import function.
- Close the Preferences dialog.

! The Auto-Import folder is the folder DVMAX checks for images or documents that need to be uploaded to patient records. It is used only to temporarily hold files while the files are waiting to be attached to a patient record, such as images that have come in from, for example, a diagnostic imaging request. The DVMAX Images folder is where all of your images are permanently stored after they have been attached to a patient record. The Auto-Images folder can NEVER be the same as the DVMAX Images folder. DVMAX prevents this from happening.

Auto-Image Import File Naming Conventions

! In order for images to be auto-uploaded to the correct patient record, the image must be named using the following format: PATIENTID_Filename.extension. For example, 1234_Test.jpg, where “1234” is the patient ID, then the underscore character “_”, then the filename

and the file extension (.jpg, .doc, .PDF, etc.). Contact DVMAX Technical Support if you have any questions about file naming conventions.

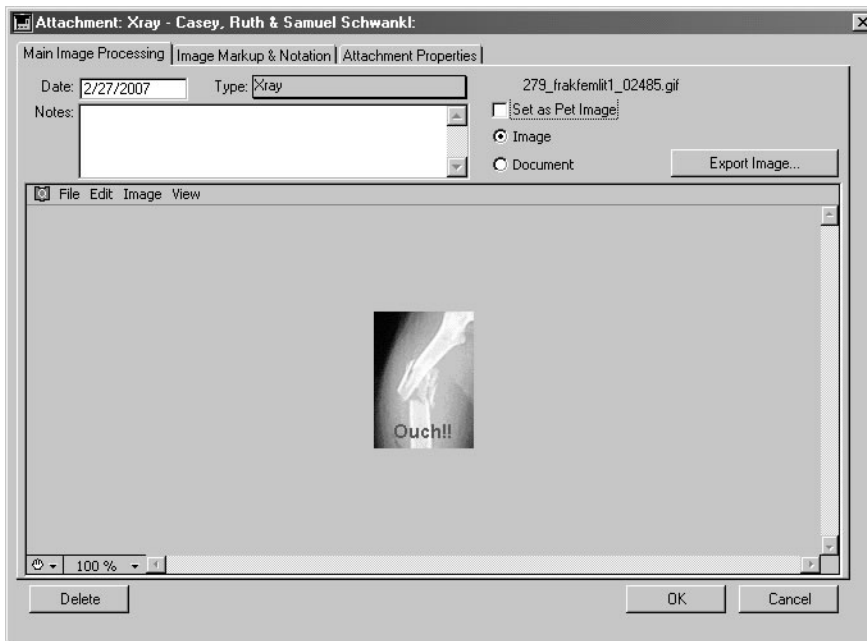
Deleting Images or Documents from Medical Record Entries

To delete an image or document from a Medical Record Entry:

- Open an existing Medical Record Entry by double-clicking it in the MRE list on the Patient History window.
- Click the **Documents** tab at the top of the MRE window.



- Double-click the image or document you wish to delete.
- The **Attachments** window appears. Click the **Delete** button in the lower left of the **Attachments** window.



- DVMAX will ask you twice to confirm that you wish to delete the image or document.





- Click **OK** in each dialog to delete the image or document and return to the **Attachments** window.
- Click **OK** on the **Attachments** window to return to the **Medical Record Entry** window.

Medical Record Entry Locking

A Medical Record Entry is a permanent addition to a Patient's history - it cannot be deleted once created. It can, however, be hidden from view at any time – see **Hiding Diagnoses and Medical Record Entries**.

Further, DVMAX automatically locks a Medical Record Entry 24 hours after it has been created. Any subsequent edits to the existing text in a locked MRE result in a duplicate MRE – the original always remains intact on the Patient History.

You can also manually lock an MRE any time within 24 hours of its creation. Manually locking an MRE has the same implications as an automatic lock after 24 hours. You cannot unlock an MRE once you have manually locked it.

Additional comments (including Findings) can be added to a Medical Record Entry at any time, and the **Hide This Entry**, **Hide on Printed History** and **Hide on Web** settings can be changed at any time.

The following components of a Medical Record Entry cannot be modified in any way after it has been created:

- Medical Record Code & Description
- Quantity
- Date and Time

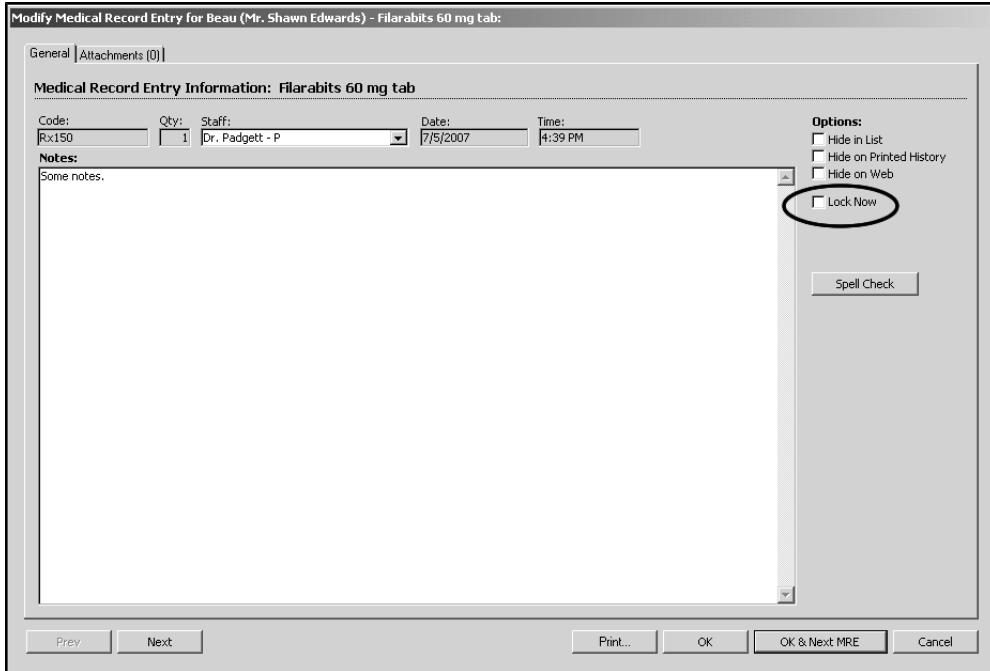
Manually Locking a Medical Record Entry

Manually locking an MRE is a one-way process: there is no way to unlock the MRE after you have locked it.

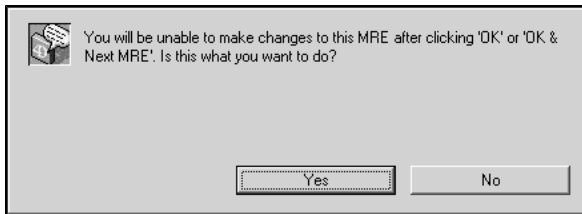
When you manually lock an MRE, a date- and time-stamped note is placed in the MRE's comments (e.g. "Manually locked by Administrator on 7/1/2007, 16:50:44")

To lock an MRE before the 24-hour automatic lock takes effect:

- Click **Lock Now** on an open Medical Record Entry



- A confirmation dialog will appear



- Click **Yes** to lock the MRE. Click **No** to leave the MRE unlocked.
- Click **OK** or **OK & Next MRE** on the Medical Record Entry window to lock the MRE. Click **Cancel** to leave the MRE unlocked.

Modifying Text on an Unlocked Medical Record Entry

To add or change a comment to an existing, unlocked Medical Record Entry (i.e. an MRE that was created less than 24 hours ago):

- Open an existing Medical Record Entry by double-clicking it in the MRE list on the Patient History window. The **Modify Medical Record Entry** window appears.