IDEXX DVMAX

DVMAX Practice v8.7 UserManual

IDEXX

What's New in DVMAX Version 8.7

DVMAX v8.7 introduces several new features, the expansion of external integration options, and many enhancements to improve productivity and help you get more done in less time. This includes the all-new DVMAX Messenger, an internal messaging facility; support for IDEXX Web PACS requisitions; rVetLink integration; the addition of Department records for improved financial reporting; and numerous enhancements to the split-ownership functionality. We've highlighted many of the new features and fixes in this What's New document. To view a complete list of fixes to user-reported issues and bugs, refer to the DVMAX 8.7 Release Notes.

DVMAX Messenger – Internal Message Board

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

rVetLink Integration

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

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

IDEXX Web PACS integration

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

Departments

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

By default, DVMAX has only one Department record, Clinic Name, and this record is used anywhere Departments are employed. To take full advantage of the Departments feature, you will need to create Department records, then assign Departments to Staff records, as desired.

Split Ownership Functionality Enhancements

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

- When ownership of a patient changes, previously finished invoices in the billing cycle are not affected. This addresses a reported issue where, when changing ownership for split ownership patients, the previous owner's billing statement could be changed if the user did not print a billing statement before changing ownership.

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

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

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

Integrations Wizard

The Requisition Setup Wizard has been renamed the Integrations Setup Wizard to more accurately reflect the enhanced functionalities available. The Integrations Wizard lets you configure requisition setup for IDEXX Reference Lab, IDEXX VetLab, Antech/Zoasis, as well as integrations for Cubex, IDEXX Web PACS and rVetLink functionality (requires rVetLink onboarding specialist).

Pet Detect Pre-Built Templates

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

Reporting Improvements

A number of updates and improvements have been made to reporting. These include:

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

- New Recalls by Department report.

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

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

- The Sales Tax Charged Out report now includes Departments.

- The Appointment by Staff Report now includes an Appointment Duration option.

- Addressed issues where text was sliced or cut off in several reports.

- Boarding report now includes a date range search rather than a single date.

Dictionary Defaults to US

Spellcheck now defaults to an English (US) dictionary instead of English (UK). A new advanced setting has been added to control this behavior, spell.defaultDictionary. The defaut value is en_US (English, US). It can also be changed to en_GB (English, UK/Canada) if desired.

Estimates and Versioning

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

Trainer and Stable Lookup

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

Record Locking Alert (Deceased Patients)

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

Client Online Registration Form

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

Label Printing Setup

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

Security and Permissions Enhancements

DVMAX v8.7 has added security/permission controls to General Management functions, including reporting. Access to all General Management functions can now be controlled on a user-by-user basis for every function, including each report (regular and custom reports). Assistance from Technical Support is needed to configure this feature.

Macro Translator Enhancement

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

Expanded Space on Health and Vaccine Forms

Users requested the ability to add more information to Health and Vaccine forms while keeping the form to a single page. Health Certificates and Vaccine Certificates now have room for approximately 12-14 rows of information under the Vaccine list area. If you have more than 12-14 rows you need to include, consider using a custom WP document, Text View or re-assess what you have listed as reminders that should print on certificates.

Reminders Added to Create/Edit Appointment Dialog

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

Bug Fixes

For a detailed list of fixes to address reported issues, refer to DVMAX v8.7 Release Notes.

MREs and Lab Results

For in-house, lab-related Medical Record Entries, the MRE now displays the type of lab result (i.e.; urine or blood) and the lab instrument name in the record.

Multiple Antech/Zoasis Account Support

The option to specify multiple Antech accounts has been added to the Integrations Wizard. Added the ability to select an Antech account when requisition is created.

Getting Started with DVMAX

Welcome to DVMAX, the complete Veterinary Practice Management solution for Windows and Macintosh. This chapter of the User Guide contains an introduction to some DVMAX basics and a few key functions. Please refer also to the **Quick Reference** chapter for more tips on getting started with DVMAX. For a more detailed understanding of DVMAX functionality, consult the relevant chapters in this User Guide.

Conventions

The DVMAX User Guide documentation contains many *Helpful Hints*. These contain useful information that will help you work more efficiently with DVMAX. Helpful Hints are indicated with an information icon.

Throughout the documentation you will also find *Important Notes*, which warn you of actions that have potential consequences you should be aware of, such as data loss or changed application behavior. Important notes are indicated with an exclamation point icon.

Other manual conventions:

- Names of menus, menu items, buttons, text enterable fields and checkboxes are in *bold*.
- Keystrokes or keyboard shortcuts are in ALL CAPS.
- Directions to accomplish specific tasks are presented as bulleted lists.

About DVMAX Anywhere

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

Many functionalities outlined in this Getting Started chapter work in very similar ways in DVMAX and in Anywhere. For specific details on working with DVMAX Anywhere, refer to the DVMAX Anywhere chapter in this user guide.

Starting DVMAX

Starting DVMAX for Windows

To start DVMAX for Windows:

- Double click the DVMAX shortcut on your Desktop. If there is no DVMAX icon on your Desktop, see **Installation**.

Starting DVMAX for Macintosh

- Double click the DVMAX alias on your Desktop. If there is no DVMAX icon on your Desktop, see **Installation**.

Starting DVMAX Anywhere

The new DVMAX Anywhere is a flexible, responsive application that works on tablet, laptop or desktop device. Anywhere offers many of the powerful features of your DVMAX client in a streamlined, web-based framework. Refer to the DVMAX Anywhere chapter of this manual for more information.

To launch Anywhere the first time:

- From the *Special* menu of the main screen of your DVMAX client, select *DVMAX Anywhere*.
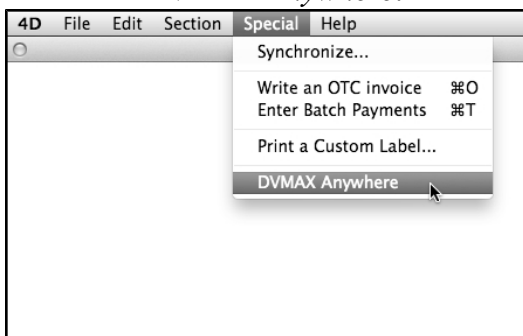
- From the *DVMAX Anywhere* dialog, choose whether to open Anywhere on your current desktop machine or on a tablet. The URL for Anywhere will be shown in the *Enter URL on Tablet* field. This URL can be used by desktop, laptop or tablet. Bookmark Anywhere in your browser for quicker access the next time you want to use it.

Logging in to DVMAX
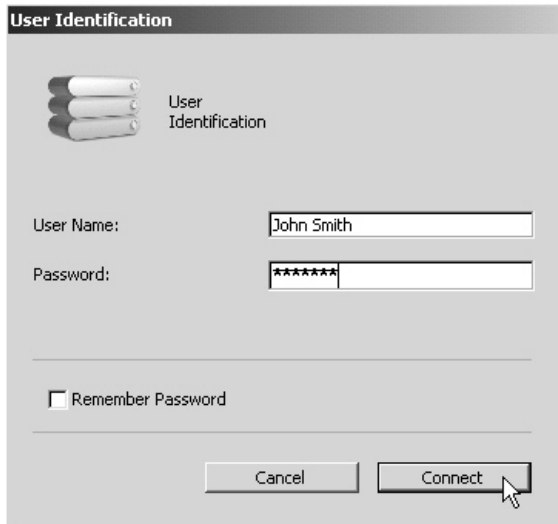
When you start DVMAX, one or two dialogs appear, depending on which version of DVMAX you have installed. The first sets up a network connection between your workstation and the DVMAX server. The second provides the login window for DVMAX.

ℹ️ If you are using the single-user version of DVMAX, only the second of the dialogs below will appear.

To log on to DVMAX:

- From the list of servers (if your display shows more than one), select the location of DVMAX.

- Click *OK*. This will connect your station to DVMAX.

- A DVMAX Login dialog will open. In the *User Name* field, type your assigned user name.

- In the *Password* field, type your assigned password. Your password can be changed from the General Management option on the DVMAX Section menu. See **Change Your Password** for more information.
- Click *Connect* or press ENTER.

Password Errors

If you type the incorrect user name or password, DVMAX will not launch. Try re-typing your user name and password.

Changing Your Password

To change your assigned password after logging in the first time:

- From the *Section* menu, choose *General Management*.
- Select the *Utilities* tab.
- Select *Set Passwords and Users* and click *OK*.
- An Alert dialog opens noting that if you are attempting to change the Administrator password, the web server will be stopped. (The web server will resume after closing out of the Users/Passwords dialog.)
- Select *Not Editing Admin User* if you ARE NOT changing the Admin password.
- Select *Stop Web Server (1 Min Delay)* if you ARE editing the Admin password. The Web Server will stop (there will be a 1 minute delay to make sure the web server is stopped) and you can then make changes to Admin passwords.
- The Passwords dialog opens.
- Select the User you wish to edit.
- The User screen displays.

- Select *Edit* to change the password, then type and confirm your password.
- Select *OK*. If you edited the Admin password, the web server will restart after closing out of the Users/Passwords dialog.

⚠ Depending on your user configuration and level of system access, you may not have access to this area of DVMAX.

⚠ The Admin password cannot be changed while the web server (Appointment Scheduler) is running. If you choose to change the Admin password, DVMAX will display a message that the web server will be stopped. It will be resumed after closing out of the edit password dialog.

Changing the User

You can change users without logging out of DVMAX. From the *File* menu, select *Change User*. The User Identification dialog opens to allow you to log in as a different user.

⚠ You should close the Appointment Scheduler and Boarding facility before you change user to be sure that the access restrictions for the new user are properly applied to those web-based functions. If the appointment Scheduler or Boarding functionality is open when you select Change User, DVMAX will prompt you to close and reopen them once you have entered the username and password for the new user.

Quitting (Exit) DVMAX

To quit or exit from DVMAX:

- Choose *Quit* from the DVMAX *File* menu.
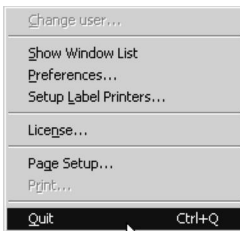
ⓘ If you have difficulty quitting DVMAX, try closing all open DVMAX windows, then try selecting *Quit* again.

ⓘ When you quit DVMAX, please also ensure that you close the appointment and boarding schedulers. DVMAX may prompt you to close these browser windows if you have not done so on Quit.

Logging In to DVMAX Anywhere

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

your session, you should log out. For more on using DVMAX Anywhere, refer to the **DVMAX Anywhere** chapter in this user guide.

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

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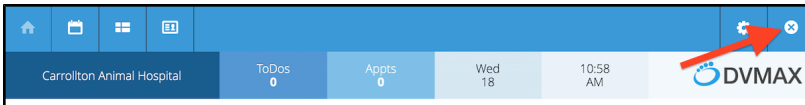
DVMAX Fundamentals

- Each text enterable "box" of on the screen is referred to as a "field". You can move from field to field in a forward direction by pressing the <TAB> key. To move backward, use the SHIFT-TAB key combination. You can also use your mouse to place the cursor in any field on the screen.

- The cursor will be an arrow unless you are in a field that accepts typed input, at which point the arrow becomes an I-beam (typing) cursor.

- The active field is typically highlighted on screen with a blue outline.

- DVMAX will automatically capitalize names and addresses. For capital letters not at the beginning of a word (e.g. McAllister) you will need to use the SHIFT key.

- If a button is double-bordered by a bold-heavy line, you can either click on it OR use the ENTER key to accomplish its task (this may not work on some laptop keyboards).

- DVMAX assigns a unique Client ID Number to each client you add. Patients are assigned a unique Patient ID number. You can use these numbers for your filing system. If you have already assigned numbers in your current filing system, you can use these numbers in DVMAX. For more information, see **Clients**.

Date Format

DVMAX expects dates to be in MM/DD/YY format. A leading 0 is recommended but not necessary. You must type / or - to separate components. If your computer's date format is not MM/DD/YY, DVMAX should work with it we recommend you test to see if your date format causes any errors. The *Calendar* icon is also available in most places where a Date field appears.

Time Format

When asked to enter a time of day in a Time field in DVMAX, the standard format is HH:MM. In most cases, seconds may be entered but will not display.

Using the Calendar

The Calendar allows you to quickly select a month, day and year. It appears in most places in DVMAX where a date needs to be entered.

To use the Calendar feature to select a date:

- Click the *Calendar* icon.

- From the *Choose a Date* window, click the left or right arrows beside the *Year* to select the year. By default, the current year is selected.

- From below the *Year*, select a month. The selected month will be highlighted.

- The calendar corresponding to the month selected will be displayed to the *right* of the Year and Month lists. Click to select a day of the month.


- Click *OK* to accept the date. DVMAX will enter the date in the date field beside the *Calendar* icon.

Pick Lists

When you are in a field which requires you to choose from a predefined list of choices (such as Bill Item Codes or Species) you can use BACKSPACE-TAB (DELETE-TAB on Macintosh) to bring up an on-screen list. You can then pick from the list by clicking on your choice with the mouse, or by using the arrow keys to highlight your choice and then pressing ENTER.

The DVMAX Main Screen or Work Area

When you have successfully logged into DVMAX, you will see the main screen or work area, sometimes called the DVMAX Splash Screen.
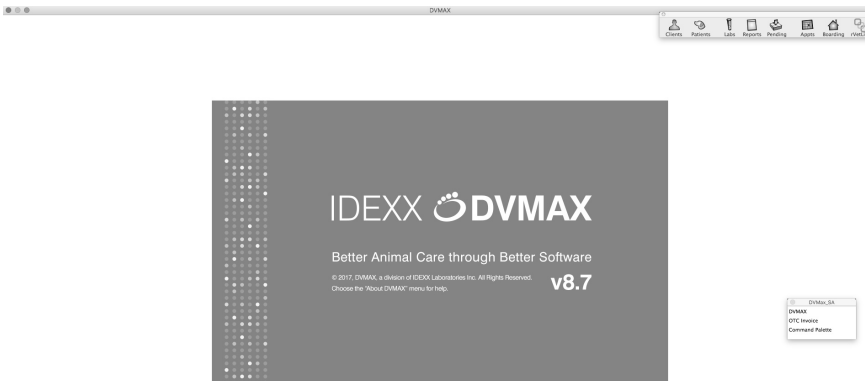
- The *Window List* allows you to see open windows at a glance, and switch between them.

- The *Command Palette* provides convenient one-click access to the areas of DVMAX you will use most frequently.

- The *Menu Bar* is located at the top of the screen, and provides access to DVMAX commands. The contents of the Menu Bar will change depending on the task you are performing.

- The *Section* menu in the Menu Bar is the most frequently used menu in DVMAX. It is the starting point for most of the work you will do.

ⓘ For details on working with DVMAX Anywhere, refer to the **DVMAX Anywhere** chapter of this user guide.

The Window List

The *Window List* allows you to see which windows are currently open and how each of those windows is currently being used. It shows the headings of all of open windows, and it may also show available windows not currently open (such as the "OTC Invoice" window).

Each item in the *Window List* reflects information about each open window. For example, if you are viewing a client record for John Doe, then the *Window List* will display "(Client) John Doe".

You can jump to any window in the *Window List* by clicking on that item on the list. This will bring the window to the front and allow you to work with it. The only time it is not possible to do this is during the display of a dialog window, when you must provide the requested information before proceeding.

One exception to the above is that the OTC Invoice option always shows up in the Window List even through no OTC Invoice may be open. It is used to bring up an OTC invoice for invoicing non-clients as quickly and easily as possible. See **Invoicing** for more information.

Hiding & Showing the Window List

You can hide the *Window List* at any time by clicking on the close box in the corner of the window. You can also move the *Window List* to a more convenient location, as it "floats" above all other windows.

If the *Window List* has been closed, you can show the *Window List* by choosing *Show Windows List* from the *File* menu.
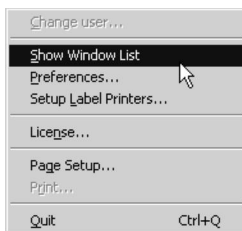
ⓘ The *Display Window List at Startup* preference controls whether the Window List is displayed when DVMAX starts.

ⓘ Each datafile in use at a practice can have a label that will be displayed as part of the Window List. This is helpful if different practices (e.g. a Small-Animal & an Emergency practice)

share the same facility but use different databases for business purposes. The label is set in *System Constants*.

The Command Palette

The Command Palette gives you one-click access to:

- Clients
- Patients
- Labs
- Reports
- Pending Items (such as To Dos and Treatment Plans)
- Appointments
- Boarding
- rVetLink
- Messages (DVMAX Internal Messenger)

For more information on most of these topics, see **The Section Menu** (rVetLink is not available from the *Section* menu).

The Section Menu

The *Section* menu consists of the following items:

Clients & Patients gives you access to Client and Patient records, along with several other key items such as Invoicing, Transactions (payments, etc.), Referral Sources, and Word Processing (Letters).

Inventory Management gives you access to Inventory, Bill items, Item Categories, Payment methods, etc.

Patient Codes takes you to the code system used for defining patient related items such as Reminders, Recalls, Treatments, Diagnoses, Staff, Rabies Info, etc.

System Constants controls the behavior of various aspects of DVMAX. All users of DVMAX at your practice share these settings.

General Management contains management and financial routines and reports, as well as utilities like setting usernames/passwords and the Integrations Setup Wizard.

Log Records gives you access to the various log records that DVMAX keeps as part of its operations.

Boarding gives you access to the boarding schedule for your clinic.

Treatment Plans provides a list of all treatments or medical procedures due or pending for patients of the clinic.

Reminders allows you to generate and send Reminders to your clients.

How to Perform a Search

All searches in DVMAX are conducted the same way, regardless the type of search. When you need to perform a search, you will use the *Find* dialog. The exact contents of the *Find* dialog are context-dependent.

To search for one or more records:

- From the *Find* dialog, select what you are searching for from the *Search For* drop-down menu. For example, to search for Clients after choosing *Clients and Patients* from the *Section* menu, you would choose *Clients* from the *Search For* drop-down menu. Note that this step is not always necessary.
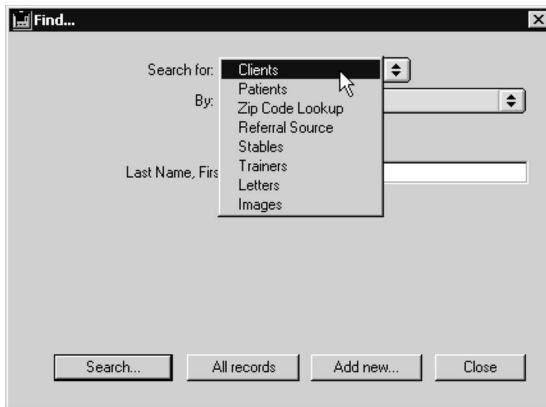
- From the *Find* dialog, select your search criteria from the *By* drop-down menu. For example, if searching for clients, you may choose to search *By* name or by those who have unfinished invoices.

- Provide additional information on the selected criteria as needed. For example, if you chose to search for Clients *By* name, you will need to type in the client's name.

- Click *Search*.

- A list of all records matching the criteria you defined is generated. If you chose to search for all Clients with unfinished invoices, then the search will return a list of every Client with an unfinished invoice.

- Select one or more records from the records list.

- Click *Show* to see the record(s).

Refer to the appropriate sections of this documentation for information on searching for specific types of records.

Sorting a Search Result

Every list of records list is sorted according to a specific default selection. This default selection is indicated by an upward or downward-facing triangle in the heading. Typically, you can re-sort the list by any of the column headings on the list, although there are occasional exceptions.

To sort the list of records:

- From the list window, click on the column heading by which you would like to sort the list. The list will be sorted according to that heading in ascending order.

- Click the heading again to sort in descending order.

Sorting Lists in Appointments and Boarding

Sorting lists under Appointments and Boarding looks slightly different, but lists can still be sorted by any of the column headings on the list.

To sort a list from Appointment or Boarding:

- From the list area, click on the column heading by which you would like to sort the list.

- From the drop down menu, choose to sort the list by the column heading in Ascending or Descending order by selecting *SortAscending* or *Sort Descending* from the menu.

Selecting Multiple Records

Once you have generated a list of records matching your search criteria, you may want to select a group of those records to view in a new window, hide a set of records from the list, or select a group of records to which to apply a specific action.

STS	ID	Name	Sex	Species - Breed	Owner name	Telephone
IH	8038	Bart	MN	Canine - Mixed breed	Mr. Finkle Dart	
AC	2589	Abby	Fem	Canine - Greyhound	Kane & Lucy Morris	322-2011
AC	6831	Alex	MN	Canine - Puli	April & Antonio Holland	937-7372
AC	553	Andy	MN	Canine - Boston Terrier	J. Miller & B. Soto	255-7783
AC	454	Angel	FS	Canine - Labrador Retriever	Sandra & Jimmy Rosso	353-0082
AC	711	Angel	Fem	Canine - Peke-a-Poo	L. Miller & S. Hill	882-2922
AC	6162	Angel	Fem	Canine - Labrador Retriever	Mrs. Meridth Faulkner	577-2225
AC	4540	Aqua	FS	Canine - Blue Heeler	Ms. Rachel Boolba	298-2211
AC	7501	Babs	FS	Feline - Domestic Short Hair	Rachael & John Acs	937-0778
AC	2498	Baby	FS	Feline - Domestic Short Hair	Mr. Manuel Urban	322-3527
AC	4499	Baby	FS	Feline - Domestic Short Hair	Tina & Dante Moravek	882-2182
AC	3853	Bandit	MN	Canine - Terrier Mix	T. Isaacson & M. Smith	322-2231

Patients (165 of 165):

To select a set of records:

- Select a record; hold down the shift key while clicking on the last record. This will highlight all the records between the first selected and last selected.

-OR-

- To select several records are not sequential on the records list, press and hold the CTRL key as you click each record you want to select.

STS	ID	Name	Sex	Species - Breed	Owner name	Telephone
IH	8038	Bart	MN	Canine - Mixed breed	Mr. Finkle Dart	
AC	2589	Abby	Fem	Canine - Greyhound	Kane & Lucy Morris	322-2011
AC	6831	Alex	MN	Canine - Puli	April & Antonio Holland	937-7372
AC	553	Andy	MN	Canine - Boston Terrier	J. Miller & B. Soto	255-7783
AC	454	Angel	FS	Canine - Labrador Retriever	Sandra & Jimmy Rosso	353-0082
AC	711	Angel	Fem	Canine - Peke-a-Poo	L. Miller & S. Hill	882-2922
AC	6162	Angel	Fem	Canine - Labrador Retriever	Mrs. Meridth Faulkner	577-2225
AC	4540	Aqua	FS	Canine - Blue Heeler	Ms. Rachel Boolba	298-2211
AC	7501	Babs	FS	Feline - Domestic Short Hair	Rachael & John Acs	937-0778
AC	2498	Baby	FS	Feline - Domestic Short Hair	Mr. Manuel Urban	322-3527
AC	4499	Baby	FS	Feline - Domestic Short Hair	Tina & Dante Moravek	882-2182
AC	3853	Bandit	MN	Canine - Terrier Mix	T. Isaacson & M. Smith	322-2231

Patients (165 of 165):

Subset/Selection

To view a selected group of records in a separate window:

- Highlight the records you want to include in the new list.
- From the records list select the *Show* button at the bottom of the window. A new list window will open containing only those records you selected.

Exclude Subset

To remove selected records from the list:

- Highlight those records you want to exclude (hide) from the list.
- From the records list window, click *Exclude* button. The selected records will be hidden from the list.

Display/Hide Columns from Lists in Appointments or Boarding

The lists you find from the Appointment Scheduler or Boarding display with a set of default columns. It is possible to hide the display of columns. To display or hide columns from the list:

- From the records list, move your pointer or "mouse over" the heading of a column on the list.
- Note that there is an arrow on the right side of the column heading. Click on the arrow to display the drop down menu.
- Click *Columns* from the menu to see the list of columns that can be displayed or hidden.
- Click on an item to select it and have it appear on the list. An item is selected if there is a checkmark in the box beside the column name.
- To hide a column so that it does not appear on the list, click the associated checkbox to remove the mark from the box. An item is hidden or deselected if there is no checkmark in the box beside the column name.

Getting Started with Clients and Patients

Creating a New Client Record

To create a new client record:

- Choose *Clients and Patients* from the *Section* menu

-OR-

- Click *Clients* on the Command Palette
- The *Find* dialog opens.
- Click *Add New* at the bottom of the *Find* dialog.
- A *New Client* record window opens. Fill out as many fields as necessary.

- Click *OK* to save the new client.

Creating a New Patient Record

To create a new Patient record:

- From the Client list, locate the client for whom you would like to add a patient.

- From the Client record, choose *Add Patient* from the *Patient* menu, or double click in a blank area of that client record's *Patient List* (in the lower left quadrant of the Client screen).

- A new patient record window opens. Fill out as many fields as necessary.

- Click *OK* to save the patient record.

⚠️ A new patient record can only be created from a client record. A patient must be associated with a client.

Creating Appointments

The Appointment Scheduler lets you create, view and modify appointments for new or existing clients and patients. You can "click and drag" on the scheduler to create appointments or you can choose *Set Appointment* from a Client record (under the *Client* menu) or Patient record (under the *Patient* menu).

The Appointment Scheduler is entirely web-based, offering additional features like patient/client Check In, expanded reporting and the ability to copy, cut and paste appointments. Refer to the **Appointments** chapter in this manual for more details.

- In Day View, select a start time for the appointment by clicking and dragging on time on the *Appointment Scheduler* for the day you have selected. Release the mouse when the appointment box is drawn. Alternatively, double click on a time block.

- An *Appointment Detail* window opens.

- You will need to identify the Client/Patient for whom you want to create the appointment using the Client and Patient fields and/or the pick list. If you are creating an appointment directly from a client or patient record, the name of the client/patient will already be filled in.

- Use the Client and Patient fields to filter the Client/Patient list.

- Define appointment details, including type of appointment, and enter comments if desired.

- Click *Save* to confirm the appointment.

- Enter your Staff ID if required.

Using the Contextual (Right Click) Menu: A Summary

Cut Appointment works in combination with *Paste Appointment* to allow you to quickly move an appointment anywhere using the same cut and paste method familiar to many applications. Clicking *Cut Appointment* removes the appointment. Find the date where you wish to move the appointment, right click and select *Paste Appointment*.

Copy Appointment allows you to create a copy or duplicate of an existing appointment and place it in another location. Right click on an existing appointment, click *Copy Appointment* and then select *Paste Appointment*.

Double Book lets you quickly create a new appointment beside an existing appointment. Right click on a selected appointment and choose *Double Book*. An appointment is created beside the existing appointment. The appointment is the same type and length as the original appointment, but there is no associated client or patient.

Find Next Appointment locates the next scheduled appointment for the patient or client. If there is no future appointment, a dialog displays indicating this.

Go To Record opens the associated Client record (if the appointment is a Client only appointment) or Patient record (for Patient appointments).

Check-In lets you mark an appointment as "checked in". This marks the start of a patient or client visit. You must choose a reason for the visit from a predefined list of options. The status of the appointment will change to Checked In and this will be noted by a check mark in the top right corner of the appointment, depending on how you have configured the Check In Status Value.

Set Status allows you to choose the current status of the appointment from the pop up *Status* menu, along with a visual marker on the appointment to allow for a quick, at-a-glance view of where a patient or client is in the appointment process. Status values are defined under Appointment Setup. These values also permit you to track the amount of time a patient spends at each stage of their visit.

Keyboard Shortcuts

The following table lists the most commonly-used keyboard shortcuts (or "hotkeys") in DVMAX. You activate a keyboard shortcut by simultaneously pressing the CONTROL key (Windows) or COMMAND key (right beside the spacebar on Macintosh) and the identified number or letter.

Press Control/Command and this key	To achieve this
1	**Search for clients and patients**. When the Find dialog is open, you can change what you are searching for by using the up and down arrow keys. You can change how you are searching for something by using the left and right arrow keys.
N	**Add New** – If you are at the client Find dialog, you have searched for the client and he/she is not in the system, you can use this shortcut to add a new client. If you are in the client screen and you need to add a new patient, the shortcut will work to add a new patient.
F	From a client record this shortcut brings you to that client's **Finances** tab.
L	In a client or patient record this shortcut brings

	you to the **Word Processing** tab.
T	Client record – Brings you to the **Add New Transaction** dialog.
	From the patient **History**tab – Add a **New MRE**
E	From the Client record - Create an **estimate**.
Y	From a Client or Patient record – Create an **Alert**
M	From a Client or Patient record – Create a **Memo**
H	From a Patient record - Opens patient **History**tab.
J	From a Patient record – **Jumps** back to owner screen.
S	From a Patient record – **Set/Find Appointment** for that patient.
B	From a Patient record – **Set/Find Boarding** for that patient.
I	From a Client or Patient record– Create an **Invoice** or bring up the open (invisible) invoice.

There are many more keyboard shortcuts in DVMAX. Each is listed next to its corresponding task in the pull-down menus.

ℹ These shortcuts will not work from the web-based Appointment Scheduler (DVMAX v7.6 or higher).

Creating an Appointment: A Quick Summary

Use the following process to create an appointment for an existing Patient or Client. If you want to make an appointment for a new Patient or Client (one who does not yet have a record), refer to the **Appointments** chapter for details.

Creating an Appointment from a Client or Patient Record

If you are creating an appointment from a Client or Patient record, the steps are the same for both. The process can be summarized as follows:

- Open the record for the Client or Patient for whom you want to make the appointment.

- Select *Set Appointment* from the *Client* or *Patient* pull-down menu. This will open the *Appointment Book* to Day View, and the next created appointment will be for the client or patient whose record you were just viewing.

- By default, the Scheduler opens to the current date in Day View. Select a different date, using the Date Picker or the Date field, if needed.

- From the appointment grid, choose a start time for the appointment by clicking and dragging on time on the *Appointment Book*. Release the mouse when the appointment box is drawn.

- An *Appointment Detail* window opens. Define appointment details and enter comments if desired.

- Enter your Staff Initials, if requested.

- Click *Save* to confirm the appointment, or click *Cancel* to return to the *Appointment Book*.

Creating an Appointment from the Appointment Book

If you are creating an appointment directly from the Appointment Book:

- From Day View, select a start time for the appointment by clicking and dragging on time on the *Appointment Book* for the day you have selected. Alternatively, double click on the appointment block where you want to create the appointment.

- An *Appointment Detail* window opens.

- Type a Client or Patient name in the appropriate field. Depending on the way your Appointment setup is configured, you may need to TAB out of the field to get the list of Clients and Patients below the Client/Patient fields to refresh.

- Select the Client or Patient from the list.

- Define appointment details and enter comments if desired.

- Enter your Staff Initials if requested.

- Click *Save* to confirm the appointment, or click *Cancel* to return to the *Appointment Book*.

ℹ️ Deceased patients are indicated in grey font in the patient listing below the Client/Patient fields.

Help and Technical Support

To access help for DVMAX:

- Select About DVMAX from the 4D menu on the DVMAX main screen.

- Click *DVMAX Help* from the *About DVMAX* dialog.

For DVMAX technical support, please call 1-800-950-5455. Please have your DVMAX User ID ready.

Quick Reference Guide

This chapter provides a quick look at some common, day-to-day clinic activities and how to access them in DVMAX. These include some common reports, generating reminders and a few other processes. This is not a comprehensive document. Refer to specific chapters in the user manual for more details on any DVMAX features.

Generating an End of Day Report

To generate a End of Day report:

- Click the **Reports** button on the Command Palette or choose **General Management** -> **Reports** from the **Section** menu.
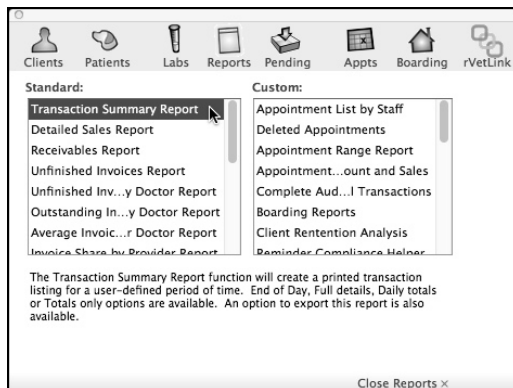
- From the Reports list, double click Transaction Summary Report.
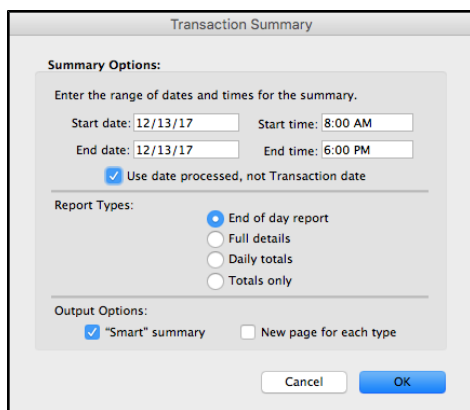
- The Start and End dates & times will automatically default to the LAST EOD report run to the current time. Change if necessary.

⚠️ If you are using DVMAX's integrated credit card processing feature and are an X-Charge client, you must run the **X-Charge/DVMAX EOD Comparison** as part of your EOD process. See *Integrated Credit Card and Debit Card Processing*.

ⓘ In DVMAX date fields, type in just the day and DVMAX will automatically default to the current month. Type in a month and day and DVMAX will automatically use the current year.

- Choose **End of Day** in the **Transaction Summary** report type.

ⓘ Smart Summary is automatically selected to tell DVMAX to remove corrected transactions, or other transactions that cancel each other out, from the report. For more information, see *The Smart Summary Option*.

- Click **OK** to generate the report.
- Click **Print** to print the report.
- If you chose **End of Day** as your report type, DVMAX will ask you to update the timer for the next end of day report.

ⓘ Before choosing **Yes** or **No** from the Print confirmation dialog, reconcile the printed report to the payments you have on hand. If everything is correct, click **Yes**. If there is an error, click **No**, exit **General Management**, correct the error, then come back to rerun the report. (If you choose **Yes**, then recognize a mistake, the report can be rerun, you will just need to manually enter the dates in Step 3).
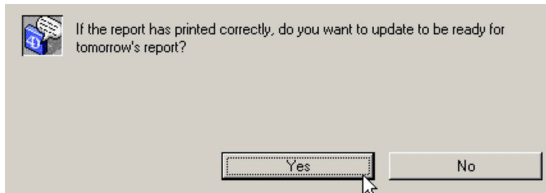
- Clicking **Yes** resets the current date, time and current receivables total for use in the next end of day report. For more information, see Transaction Summary Report Types in the main Manual.

End of Month Reports

Generating an End of Month Report

To generate a **End of Month Report**:

- Click the **Reports** button on the **Command Palette** or choose **General Management** -> **Reports** from the **Section** menu.
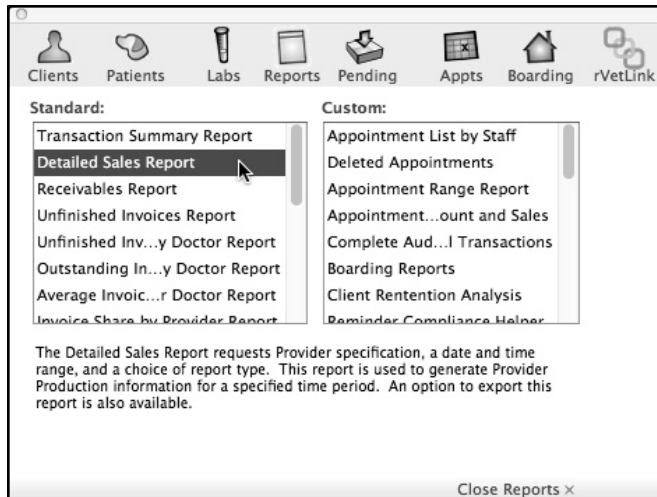
- From the Reports list, double click **Detailed Sales Report**.
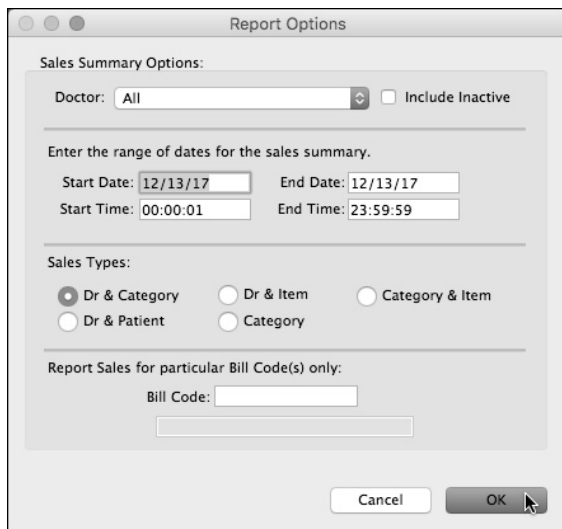
- Choose a Doctor to report on from the **Doctor** drop-down list at the top of the **Report Options** screen or leave the field as it is defaulted. This will print the EOM report for ALL doctors in your practice.

- Type the time period you wish to include in the report into the **Date Range Entry** boxes. The format for all dates in DVMAX is MM/DD/YYYY. If you type just the day, DVMAX will fill in the date with the current month and year. If you type the day and month, DVMAX will automatically choose the current year.

- Choose a **Sales Type** by clicking the appropriate radio button. (The most common report is the Dr. & Category.)

- Click **OK** to generate the **Detailed Sales** report. DVMAX will begin compiling the report. The time it takes to generate the report depends on the amount of data DVMAX needs to sort through and the speed of your computer.

- Click **OK** to print the report.

Printing and Exporting Reports

You can print all financial reports in DVMAX. You can also export some reports to a text file that you can then open in a spreadsheet application such as Microsoft Excel. The reports available for export are:

- Full Details Transaction Summary
- Daily Totals Transaction Summary
- Totals Only Transaction Summary
- Detailed Sales
- Receivables
- Sales Tax Collected

A setting in **System Constants** (**Main Constants** tab) controls whether DVMAX gives you the option to export reports. Then, each time you print a report, DVMAX will ask if you want to Print or Export the report.

Receivables Report

The **Receivables** report gives you a snapshot of what is owed to you by your clients (Accounts Receivables), and what you owe them (Credit Balances) at the time you run the report.

Generating a Receivables Report

To generate **a Receivables** report:

- Click the **Reports** button on the **Command Palette** or choose **General Management** -> **Reports** from the **Section** menu.
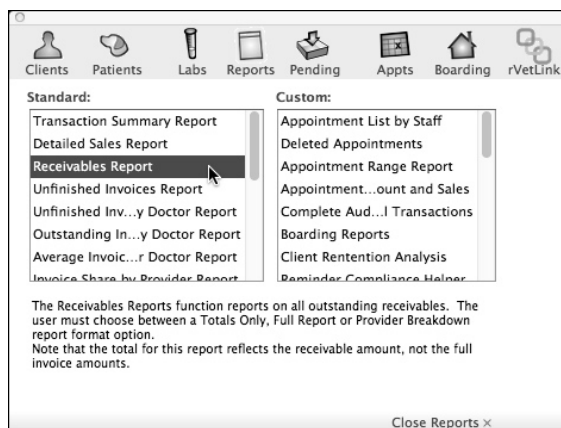
- From the Reports list, double click **Receivables Report**.
- Choose a **Receivables** report type (**Totals Only**, **Full Report** or **Provider Breakdown**) by clicking the appropriate radio button. For information on the differences between types of **Receivables** reports, see the following section, *Receivables Report Types*.
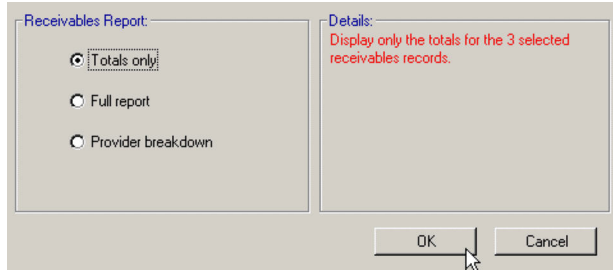
- Click **Print** to print the report.

Receivables Report Types

DVMAX can produce three variations on the **Receivables** report: a **Full Report**, a **Totals-Only** report and a **Provider Breakdown** report.

The Full Report

The **Full Report** is the most comprehensive **Receivables** report type. For each receivable and credit balance, DVMAX lists:

- The client's name and ID

- The amount and date of the client's last payment

- The client's telephone number

- Subtotals of the client's total balance by age (current, 30 days, 60 days, and 90+ days)

- The total amount due from this client

DVMAX also totals receivables and credits, and combines the two for an overall total. The percentage of your balances at each age (current, 30, 60 and 90+ days) is calculated.

The Totals-Only Report

The **Totals-Only Receivables** report is a summary of your Accounts Receivables and Credit Balances. For both Receivables and Credits, DVMAX shows aged amounts (current, 30 days, 60 days, and 90+ days) and the percentage of the total balance at each age. Overall totals are also provided.

The Provider Breakdown Report

The **Receivables By Provider** report type lists the total receivables produced by each provider in your practice. The percentage accounted for by each provider is also calculated, as is a total for your practice as a whole.

Any receivables not attributed to a provider are also listed on the report. Totals for sales taxes are also provided.

ℹ️ The **Provider Breakdown** report type is useful if you pay your providers based on production.

Calculation of Staff Compensation Based on a % of Collected Revenue

This calculation is used when a staff member is to be compensated based on a % of **collected revenue** rather than on a % of **'Billable Amounts'**.

To calculate a % of billable amounts:

- Produce a **Detailed Sales Report** listing the **Dr**. and **Category**.

- Enter the **date range** for the current month and choose **OK**.

This report provides production values for each Provider over the chosen period.

- Produce a **Receivables Report** listing **Provider Breakdown**.

⚠️ It is not possible to enter a date range when printing a **Receivables Report**. It is important that you print and or export **Receivable Reports** each month for comparison purposes.

- **Compare** the **current** receivables to the **previous** month value.

- If the receivable difference has **increased** over the previous month, the difference is **added** to the Total sales

- If the receivable difference has **decreased** from the previous month, the difference is **subtracted** from Total Sales.

- Calculate the new Total Sales value and multiple by the commission rate.

Printing Reminders

A reminder is a notice that is sent to a client indicating that a patient is due for a specified procedure or set of procedures. DVMAX's **Reminders** function lets you identify all patients needing reminders for procedures due within a specified date range, and allows you to create and send reminder notices via email or standard mail.

Reminders: A Quick Overview

To create a list of patients requiring a reminder notice:

- From the **Section** drop-down menu, choose **Reminders**.
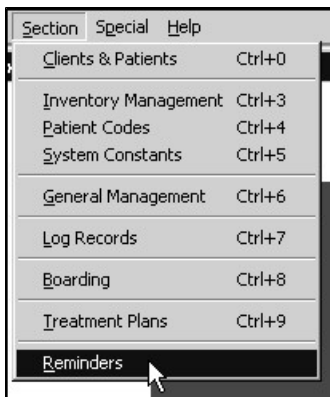
- From the **Reminders** window, select **a Date Range**, or use the default range as listed. The default **Date Range** is determined by the **Reminder Setup** button**.**
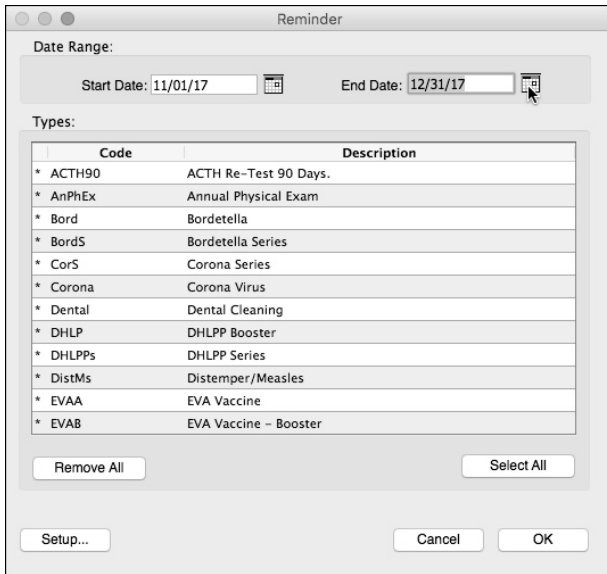
- Choose the procedures for which you would like to create reminders from the **Types** area of the **Reminders** window. By default, all procedures are selected.

- Procedures can be added/deleted from the default procedures list.
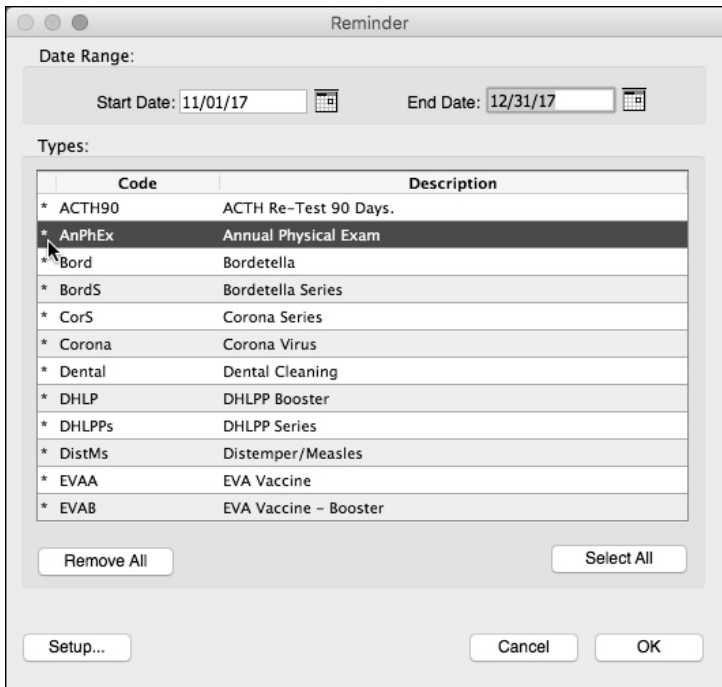
- Click **Select All** to include all Reminder Types.

- Click any item to select it, click again to deselect the item.

- Click **Remove All** to deselect all Reminder Types.

- Once you have selected the reminder types of interest, click **OK** to produce a list of all patients requiring reminders.
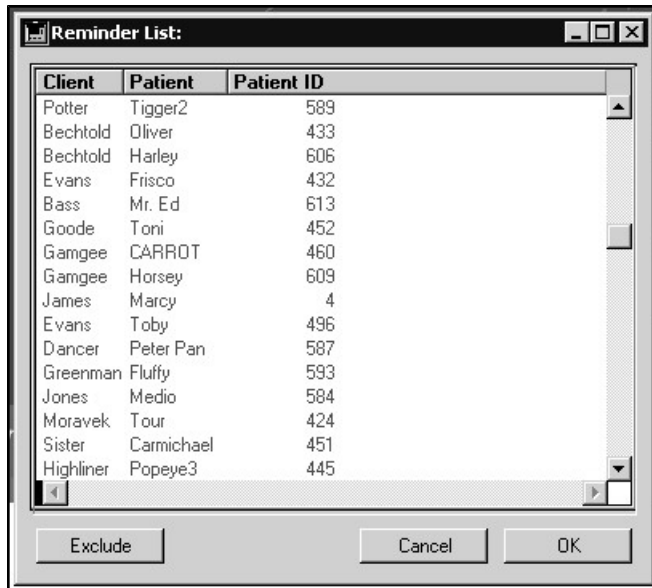
The list of patients generated by the **Reminder** function is color-coded to indicate that the patient is due to receive either a first, second or third reminder. For each patient, all procedures due within the specified date range will appear on the same reminder notice. Depending on how you have set up the **Reminder** function (see *Reminder Setup*, patients can be sent up to 3 reminder notices.

- Green indicates first reminder.

- Blue indicates second reminder.

- Red indicates third reminder.

- From the **Reminder List** window, click **OK** to generate the reminder notices. The kind of reminder notice created (email or standard mail) will be determined by the selection you have made in the client record.

ⓘ Where the **Email Reminder** box is checked on the **Client** record, an email reminder will be sent. For those clients where the **Email Reminder** option is not selected, a regular mail notice will be prepared.

Excluding Patients from the Reminder List

You can choose not to generate a reminder for any patient on the Reminders list.

To exclude a patient:

- Click to highlight a patient from the list.

-OR-

- Click and drag to highlight a group of patients from the list.

- Click **Exclude**. The selected patients will be removed from the list.

ⓘ Excluded patients may be used for an owner that you know has called to schedule on their own already, or if a new staff member's pets are listed and that staff member has not been marked as "Do Not Send Reminders"
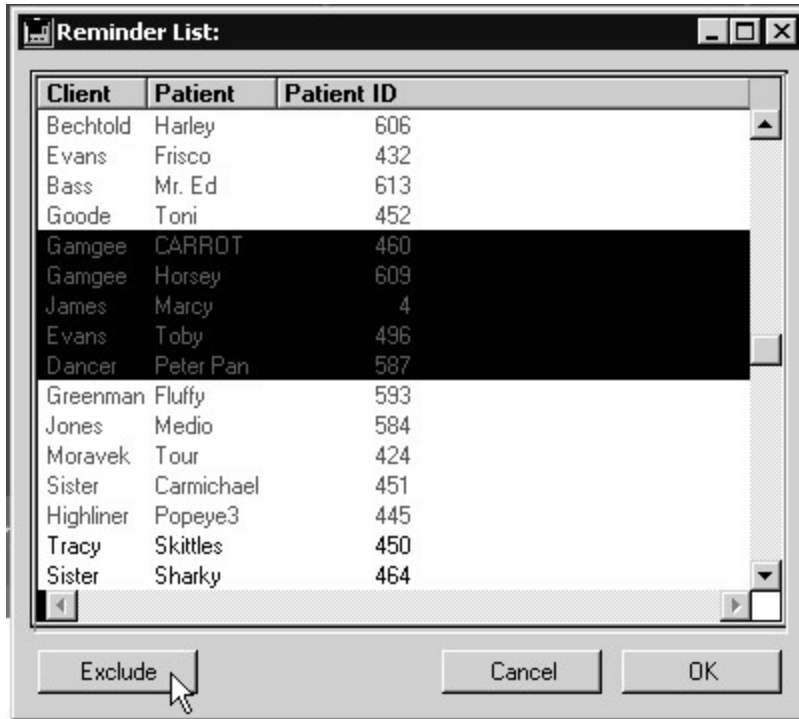
Reminder Setup

The **Reminder Setup** determines the format of the **reminder notice**, as well as the default **Date Range**.

To configure the **Reminder** function:

- From the **Section** menu, click **Reminders**.

- From the **Reminder** window, click **Setup**. The Reminder Setup window opens.

- From the **Send Reminders** area, choose how often you wish to generate reminder notices (Monthly, Semi-monthly or Weekly). The default value is semi-monthly. This will determine the default **Date Range** used in generating the **Reminder List**. **DateRange**, including **Start Date** and **End Date** fields, appears on the main **Reminder** window.

The Monthly default Start Date will be the first day of the month following the current month (current date is the first of the month). Semi-monthly will default to the first or middle of the month, depending on the current date. For example, if the current date is May 5, the default date for Semi-monthly will start at May 15. For Weekly, the default Start Date will be the Monday of the week following the current date.

- From the **Reminders to Send** menu, select the number of reminder notices to send to each client and associated patient. You can send a single reminder, or choose to send second and third reminders.

- From the **Format** drop-down menu, select **Built-In** (default), **4D Write** or **Semi-Custom**. Follow the same process for **Mail** and **E-mail** reminders. You cannot send reminders by both mail and e-mail to the same client and you must have a valid e-mail address in the client's record in order to send an electronic reminder.

- If you choose a format other than **Built-In**, click **Set** to select the format for reminders.
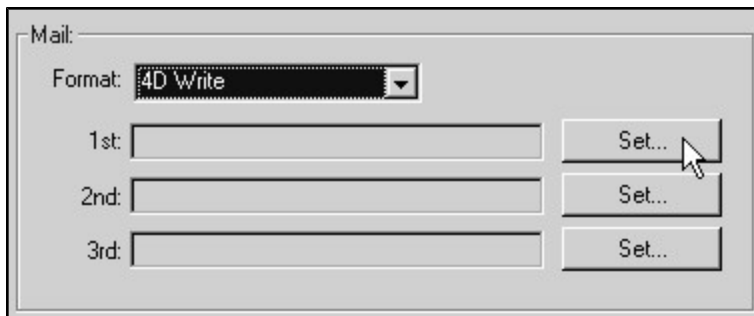
- Repeat the format setup for First, Second and third reminders as applicable. You will only see second and third reminder options if you have chosen 2 or 3 from the **Reminders to Send** menu.

- If you are sending mail reminders, you can choose to include more than one reminder card per printed page. Click **Multiple Cards on a Page** to include more than one reminder on a page. *If you are using the recommended 3-up cards, you should check this setting.*

ℹ️ Only one reminder per patient will be sent out at any one time. All procedures for which a patient is due within the selected Date Range will appear on the same reminder notice. If the patient comes in they will be marked as complying with the reminder and will be sent no further reminders for the procedures listed on the last reminder sent. If the patient does not present, the patient may appear on the Reminder List the next time Reminders is run. In order for a patient to receive a second or third reminder, the specified time between reminders (as set up under System Constants) must have lapsed, and you must have indicated under Reminder Setup that you wish to generate second and third reminders.

Adding a New Transaction

Payment Information

DVMAX provides multiple methods to pay for treatment and services and also allows the client to split the payment into two types of methods on an invoice. You may specify up to two methods of payment per invoice on the payments area of the invoice screen. In most cases, only one will be needed.
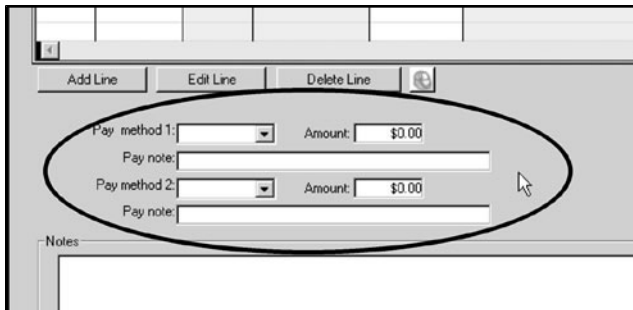
To add payment information:

- Select a pay method from the **Pay Method 1** drop-down list. For more information on using DVMAX integrated credit and debit card processing (pay methods cCard and Debit), refer to Integrated Credit Card and Debit Card Processing.
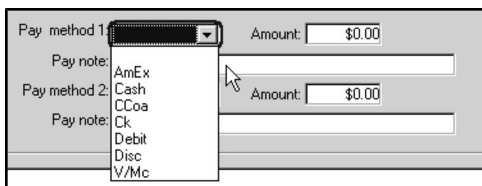
- The full amount owing on the invoice may automatically appear in the first **Amount** box, depending on the **Suppress Auto-entry of Payment Amount** System Constant. See *System Constants that Affect Invoicing* for more information. You can edit the contents of the **Amount** box at any time while the invoice is unfinished.

- The **Pay Notes** box will fill in automatically when you supply a pay method. You can edit the Pay Notes if necessary and your changes will appear on the printed invoice.

- Repeat the steps above for **Pay Method 2** if necessary.

- The combined total of the values in the Pay Method 1 and the Pay Method 2 boxes will appear in the Payments field.

Type CONTROL+P (COMMAND+P on Mac) to jump to the payments area from any other part of the invoice. This will bring you to the first payment method field.

Credits

Credits are used when you would like to make a credit on a clients account but don't want to change your revenues for the day. Credits are put forward against future changes and or purchases.

A credit is only used if **no money was received**. There is no connection with payments made with credit cards.

To make a credit on a Client's account:

- Select the **Client** you would like to add a credit.

- Select **Add new transaction** from the **Client** menu.

- From the Transaction dialog, select **Credit** in the **Transaction Type** drop-down menu.

- Add **Transaction amount** (credit).

- Add **Notes** to clarify why the credit was made.

- Select **OK.**

Non-Sufficient Funds (NSF) and Chargebacks

In cases when a check comes back with non-sufficient funds you will need to edit the original invoice to reflect a new payment and or enter a charge for the NSF.

To edit the original invoice to reflect the new payment arrangement:

- Open the **Client** screen for the client who wrote the NSF check.

- Click the **Finances** tab.

- Select the payment made with the NSF check.

- Select **Add new Transaction** from the **Client** menu.

- From the Transactions dialog, select **Chargeback** from the **Transaction Type** menu.

- Enter the date of the original NSF payment.

- Enter the amount of the original NSF check in the Transaction amount entry box. You will be recharging for the original NSF amount.

- Add a note stating this is a Chargeback for a NSF, with date, type and amount.

- Click **OK.**

If you wish to make an additional charge for the NSF, repeat the Add New Transaction process above and create a Chargeback for the NSF fee charged.

- Enter the Transaction Type as **Chargeback**.

- Enter the original **Date, Transaction amount** and **notes**.

- Click **OK**.

Editing, Correcting or Voiding Finished Invoices and Payments

⚠️ Editing or correcting a finished invoice can have unintended consequences on your practice's financial records. If you are uncertain how to correct an error on a finished invoice, or if you are uncertain of the effects your correction might have on your financial records, please contact DVMAX Technical Support before proceeding.

Editing or Correcting a Finished Invoice

To edit a finished invoice:

- Locate the client for the invoice.

- Locate the invoice you wish to edit on the Client Finances tab.

- Double-click the invoice you wish to edit.

- Choose **Edit This Invoice** from the **Invoice** menu on the DVMAX main screen.

- DVMAX will ask you to confirm that you wish to edit the invoice. Click **Yes**.

- DVMAX will ask you to confirm again that you wish to edit the invoice. Click **Yes**.

- DVMAX may ask you if you wish to keep any payments originally made on this invoice. Choose **Keep Pmnt** (Keep Payment) if you have already deposited the payment originally made on this invoice. Choosing **Keep Payment** will reverse the invoice only, not the payment. The payment will stay on the client's account.

-OR-

- Choose **Enter Again** if you have not deposited the payment originally made on this invoice. Choosing **Enter Again** will reverse both the invoice and the payment. Behavior will be different for transactions involving the integrated credit

and debit card processing. Refer to *Integrated Credit and Debit Card Processing* for more information.

⚠️ If you choose **Keep Payment**, do not enter the payment again when editing the invoice. If you choose **Enter Again**, make sure to enter the payment again while editing this invoice.

- DVMAX will create a new invoice with the same line items, patient and staff as the original. Make the necessary changes to the invoice.

- Click **OK** to save your changes. Your changes are recorded on the Client Finances tab.

Voiding an Invoice

If an entire invoice is incorrect or unnecessary, you may void or cancel the invoice. When you void an invoice, DVMAX creates an Edit Credit on the Client Finances tab to 'zero' the balance due for the line items on that invoice. DVMAX also creates an Edit Charge on the Client Finances tab to remove any payment(s) made on the voided invoice. DVMAX also stores a note as to the date the void was performed.

⚠️ Depending on your payment processor, you may not be permitted to void an invoice on which a credit or debit card transaction has been processed using the integrated credit and debit card feature.

To void an invoice:

- Locate the client for the invoice.

- Locate the invoice you wish to void on the Client Finances tab.

- Double click the invoice you wish to void.

- Choose **Void This Invoice** from the **Invoice** menu on the DVMAX main screen.

- From the Confirm dialog, click **Yes** to confirm that you wish to void this invoice.

- DVMAX voids the invoice and returns you to the Client Finances tab.

Voiding a Payment

DVMAX creates an Edit Charge on the Client Finances tab to remove any payment(s) made. DVMAX also stores a note as to the date the void was performed.

⚠️ When you try to void a credit card (cCard method) payment, DVMAX tries to perform a refund first, then do a return afterward. If both fail, DVMAX lets you know you need to run the void manually. DVMAX assumes you wanted to perform the void regardless of the method and will post the refund/return transaction as Echg in DVMAX Client Financials to reflect the refund you process.

⚠️ Depending on your payment processor, you may not be permitted to void a debit card transaction. You will have to use the credit card (cCard) method to issue a refund instead to try to have funds returned to the client's credit card, or issue a refund or return in the same way you would for a cash transaction. If you try to void a Debit transaction with a processor that does not

permit this transaction (processed using DVMAX's integrated credit and debit card feature), you will get an Alert notice from DVMAX indicating that you cannot perform the void.

To void a payment:

- Locate the client for the payment.

- Locate the payment you wish to void on the Client **Finances** tab.

- Double click the payment you wish to void.

- Choose **Void this Entry** from the **Transaction** menu.

- DVMAX will ask you to confirm that you wish to void this payment. Click **Yes** to void the transaction.

- DVMAX voids the payment and returns you to the Client Finances tab.

Batch Payments

Batch Payments allows you to enter **more than one** payment in one simple screen. This saves you the time of having to enter multiple payments.

To make a Batch Payment:

- Select **Enter Batch Payments** from the **Special** menu of the DVMAX main screen.
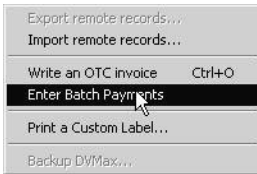
- From the Batch Payment Entry dialog, type the Client ID or last name (or partial last name) of the client record to which the transaction applies.

- If there is an outstanding balance for this particular client it will be posted in **starting balance.**

- Enter the payment amount you wish to make in the **Transaction Amt** box. The **New Balance** will then display.

- Add **Payment Method** and add **General Notes**

- Click **OK**

Using DVMAX on the Remote Terminal

Ensure that you have followed the steps in Setting Up For Remote Processing. Not setting up properly will cause the remote processing procedure to fail, and can cause serious damage to your data. For more information on using DVMAXSync (Remote Processing), please refer to the chapter *DVMAXSync and Remote Processing*.

Barn Billing
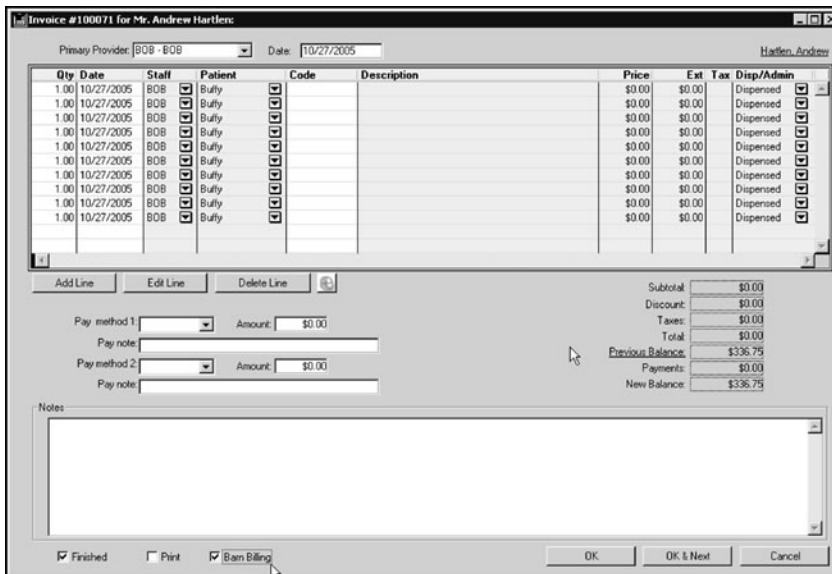
Barn Billing applies a single invoice to a group of patients. DVMAX will generate an identical invoice for each patient in the group and apply the history to each patient and invoice to each individual client. Barn Billing is used mostly in equine practices.

To use Barn Billing, your DVMAX datafile must be labeled Equine in System Constants.

⚠ DVMAX recommends you do not leave barn-billed invoices unfinished.

To barn bill, you will first need to create an invoice:

- Search for a patient in the barn/stable.

- Select a patient by double clicking on the patient's name.

- Create an invoice.

- The Invoice dialog will display and will be titled "Invoice *xxx* for *Client Name*", where *xxx* is a unique invoice number generated by DVMAX and *Client Name* is the name of the client you are billing.

- By default, the current date is in the **Date** field. Type a different date if needed.

- Type the details of the product or service you are selling in a Line Item row. Include the **Quantity** of the item sold, **Date** (if different from the current date), **Staff** (if different from the Primary Provider), and **Item Code**. Each product or service uses one line item row. To add a line item row, click the **Add Line** button.

  - Before clicking **OK** to post or save the invoice, select the **Barn Billing** checkbox.

⚠ The Payment Fields are removed for Barn Billing. You do not want to add a payment to this invoice, as it would apply the payment to each client record. If an owner paid you onsite, you will need to use the **Add New Transaction** option from the Client menu of the Client record to enter the payment separately.

  - Click **OK**.

  - You are returned to the original patient history.

  - Perform the same search for the Patients associated with the barn/stable.

  - You are returned to your original list of Patients from the stable.

  - Highlight the patient you just invoiced and **exclude** this patient.

  - Exclude any other patients that did **not** receive these services.

ℹ You can select multiple patients by holding the CONTROL key (COMMAND on Mac) while clicking.

  - Click **Add Patients** on the **Barn Billing** window. The **Barn Billing** window will update to reflect the number of patients you selected.

  - When you have finished adding patients, click **Apply to Patients** on the **Barn Billing** window.
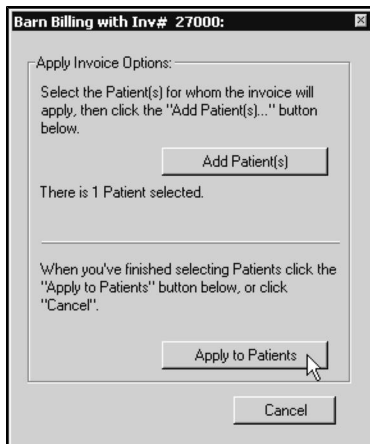
- DVMAX will ask you to confirm that you wish to apply the invoice to this group of patients.
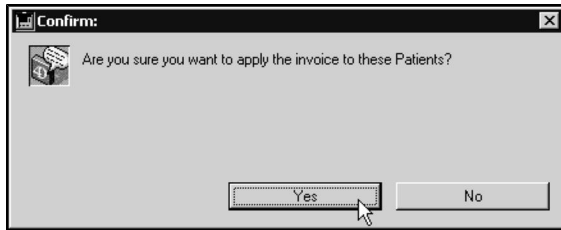
- Click **Yes** to invoice the group of patients.

Users and Groups (Usernames & Passwords)

To create new Users (with usernames and passwords) and Groups for your office, you will need to have access to the Users and Passwords functions from General Management. The **Set Users and Passwords** option will list all current Users and Groups and will allow you to create and edit additional users or groups.

To create or edit Users and Groups:

- From the **Section** menu select **General Management**.

- Select the **Utilities** tab.

- Select the Set **Password & Users** radio button and click **OK**.

- From the Confirm dialog, select **Not Editing Admin User** if you are not editing a user designated as Administrator. Select **Stop Web Server (1 min Delay)** if you will be working with a user designated as an Administrator. Contact DVMAX Technical Support if you are not familiar with these operations.

- The DVMAX users and groups **Tool Box** dialog displays.
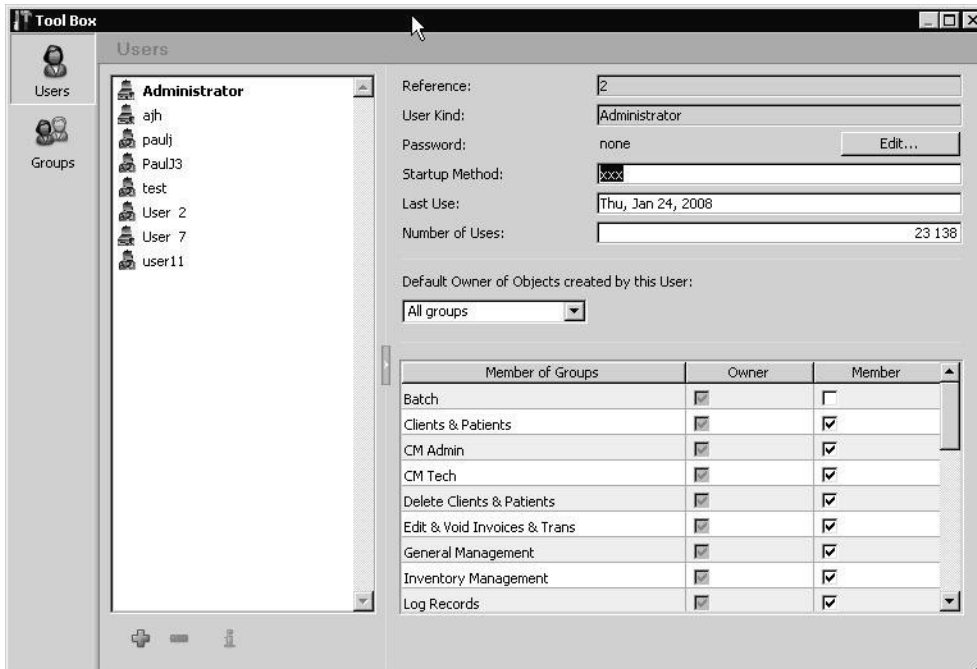
- The relationship between the Users and Groups is that **Users are assigned to a Group** while **Groups are assigned privileges**. With this structure, a User must be part of Group to gain the privileges associated with that group.
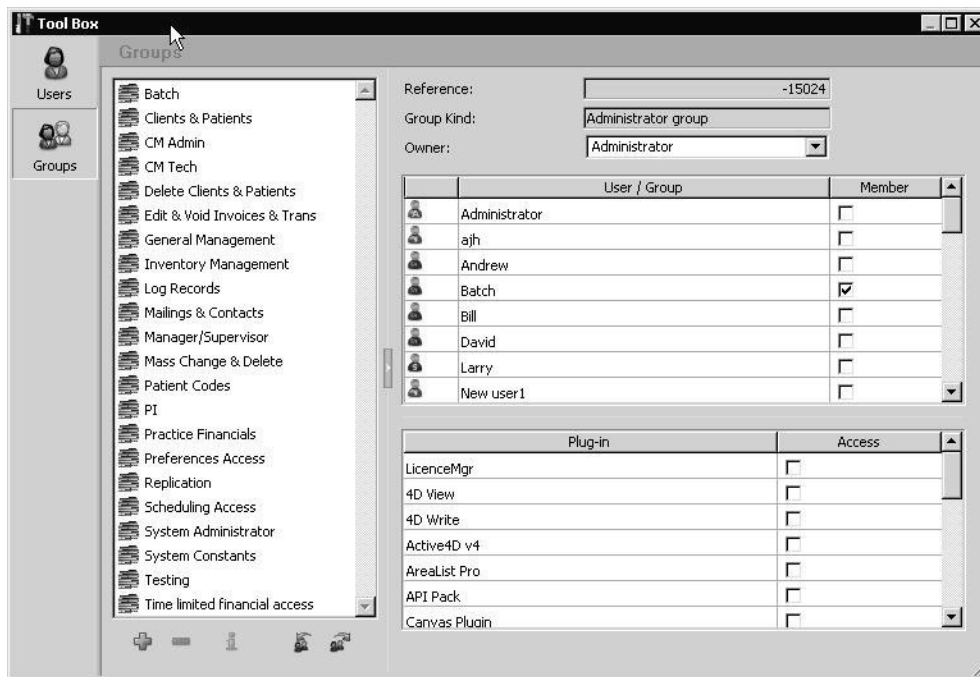
Adding a new User

To add a new user:

- Click the plus sign under the Users list.

- Type a name for the user. Click **Edit** and type a password. Confirm your password. Click **Change**.
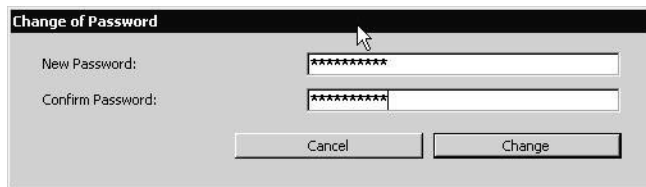
- In the Member of Groups area, select the groups to which this user will belong.

Deleting a User

Only the Administrator has the ability to delete a User. Contact your System Administrator.

Security Groups

To view security groups, click the **Groups** button at the left of the Tool Box. Groups display in the Groups list on the left, and Users display in the User/Group list in the upper right. In the Members column, click to select which users belong to the group.
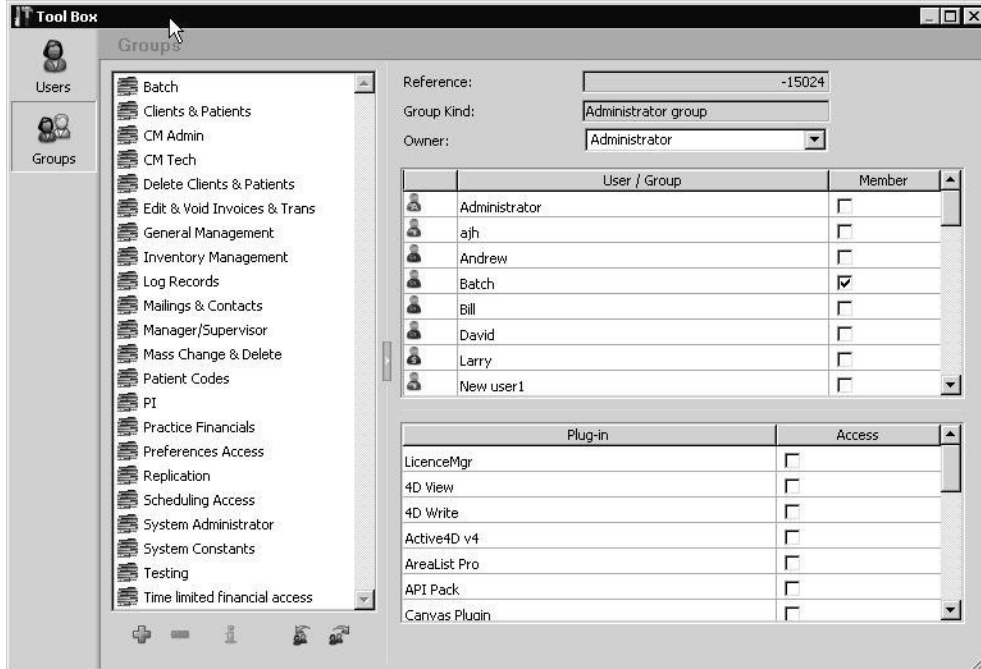
DVMAX Practice provides the following default security groups:

- Batch
- Clients & Patients
- Delete Clients & Patients
- Edit & Void Invoices & Trans
- General Management
- Inventory Management
- Log Records
- Mailings & Contacts
- Manager / Supervisor
- Mass Change & Delete
- Patient Codes
- Practice Financials
- Preferences Access
- Replication
- Scheduling Access
- System Administrator
- System Constants
- Testing
- Time Limited Financial Access
- User Site Access
- Word Processing Access

Saving and Restoring Users and Groups

When the DVMAX server shuts down, it automatically writes its Users and Groups to a file location on the server machine. If you need more information on this, please contact DVMAX Technical Support.

Manually Saving Users and Groups

To manually save your current users and groups configuration to file, click the **Save Users and Groups** icon below the Groups list in the Tool Box.
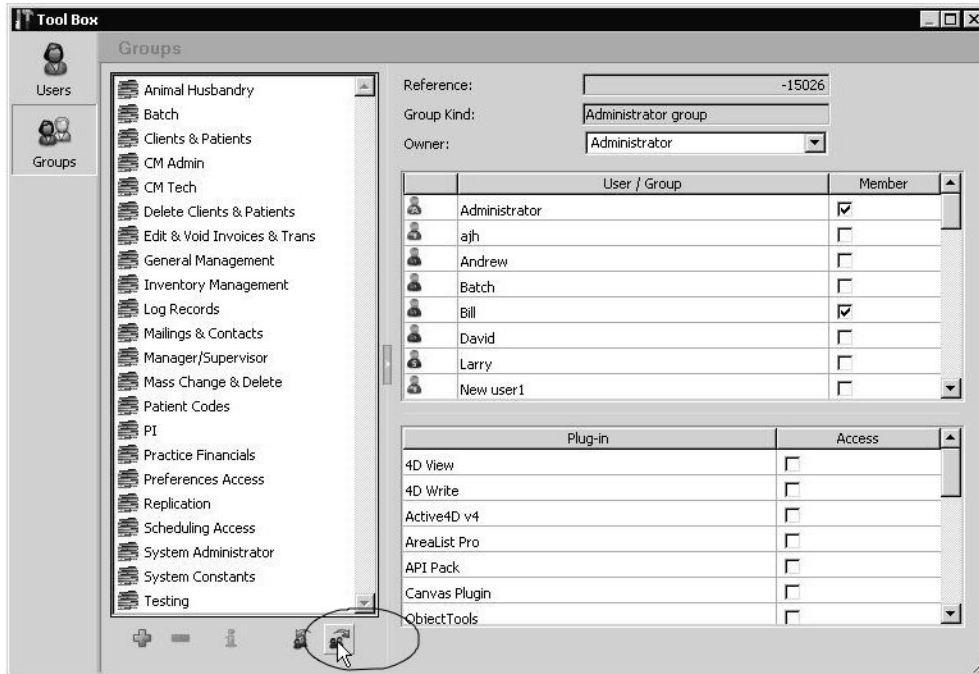
- A Save dialog box displays. Specify a file name and location for the file. Click **OK**.

Manually Loading Users and Groups

To load saved users and groups from file, click the **Load Users and Groups** icon below the Groups list.
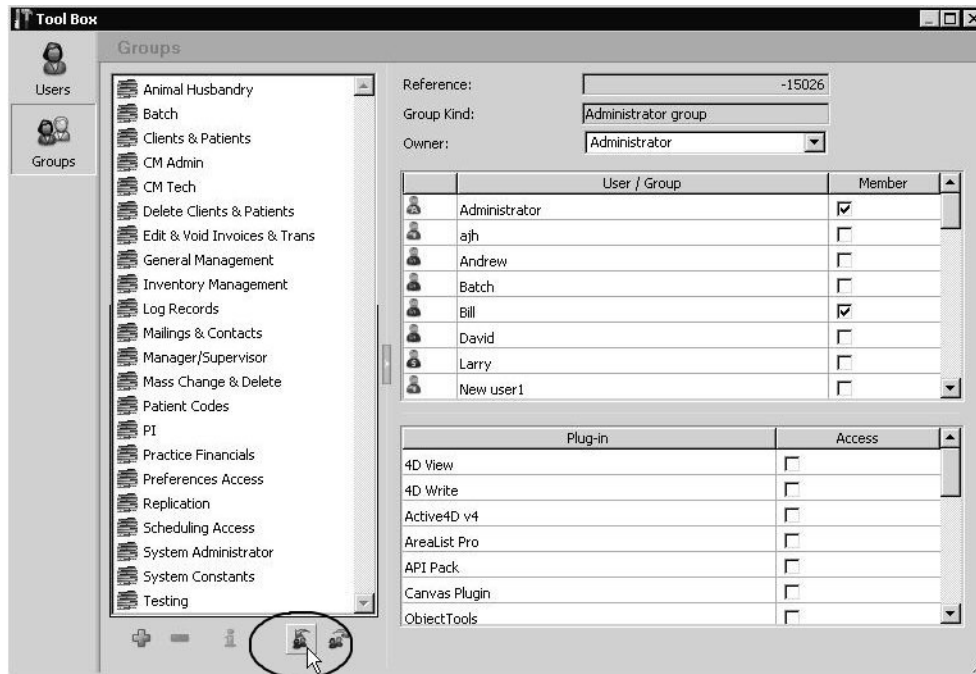
A dialog box displays. Locate your users and groups file, and click **OK**.

Quitting or Exiting from DVMAX

To quit or exit from DVMAX:

- From the DVMAX main window, choose **Quit** from the **File** menu.
- If you have difficulty quitting DVMAX, try closing all open DVMAX windows, then try selecting **Quit** again.

Force Quitting from DVMAX

If you cannot quit DVMAX in the usual way you will need to force quit the program. Force Quitting is used on the Mac while CTL+ALT+DEL is used on the PC.

ℹ️ If DVMAX appears to be 'locked' and won't let you do anything, or if the cursor looks 'different' –one black and one white box – try hitting the spacebar. This will often bring a window to the front that **must** be dealt with before DVMAX will allow you to proceed.

⚠️ A Force Quit should **always** be your last resort. Unsaved changes in your open applications will be lost when force quitting.

Force Quitting In the PC

If you cannot quit an application you will need to Force quit by:

- Selecting CTL+ALT+DEL on your keyboard while the program is running in the foreground.
- Choose the DVMAX program and click "End Task"

Force Quitting on the Macintosh

If you cannot quit an application you will need to Force quit by:

- Choosing Force Quit from the Apple menu (or press ALT + Apple/Option Key + ESC),
- A dialog box will appear,
- Select the unresponsive application and click Force Quit.
- Say yes to the Confirm box that will appear.

Adding Alerts vs. Memos

DVMAX has **two** ways to provide **patient or client notes** to other staff members.

The first option is to place an **Alert** note in the Command Palette when the patient or client record is opened. The second option is to create a **Memo** note that appears on screen in a small pop up window when the patient or client record is opened.

Creating an Alert Note

To create an Alert note for a Patient:

- Open the **Patient** record to which you wish to attach the **Alert** note.
- From the Patient record, select **Set Alert Message** from the **Patient** menu.
- A window named **Alert note for this record** will display.
- Add your note to the Alert window and click **OK.**
- The note displays in red at the below the Command Palette when the patient record is open.

To create an Alert note for a Client:

- Open the **Client** record to which you wish to attach the **Alert** note.
- When the Client record is open, select **Set Alert Message** from the **Client** menu.
- A dialog named **Alert note for this record** will display.
- Add your note to the Alert window and click **OK**.
- The note will display in red below the Command Palette when the client record is open.

⚠️ Client Alerts will show up whether you open the client **or** any of the client's patients. Patient Alerts **only** appear when you open the specific patient record.

Creating a Memo

To create a memo from a Patient record:

- Open the **Patient** record you to which you wish to attach the **Memo**.
- From the Patient record, select **Create a Memo** from the **Patient** menu.

- A pop up window named **Enter your memo below** will display.

- Add your memo to the window and click **OK.**

- A memo window will come to the forefront of DVMAX the next time this record is opened.

To create a memo from a Client record:

- Open the **Client** record to which you wish to attach the **Memo**.

- From the Client record, select **Create a Memo** from the **Client** menu.

- A pop up window named **Enter your memo below** will display.

- Add your memo to the window and click **OK.**

- A memo window will come to the forefront of DVMAX the next time this record is opened.

ℹ️ You are able to delay the time of a Memo. For instance, if a client drops off a cat for a spay in the morning and asks you to remind them to buy a bag of food when they pick the cat up that afternoon, you can enter a Memo, but delay the notification time until the pickup time, then you don't have to see the Memo for the rest of the day.

⚠️ Memos show up in a client or patient record regardless of whether it was originally added to the client or patient record.

Clearing the Cache (For Advanced Users Only)

In order to optimize performance, DVMAX stores certain application elements fetched from the server (such as the user interface) on your local hard disk. Over time, it is possible for this cache to become outdated or corrupt. If you notice odd behavior on your DVMAX workstation that does not occur on other workstations in your practice, you may need to clear the application cache.

Clearing the Cache on Mac OS X

- In the Finder, navigate to /Library/Application Support/4D Folder.

- Delete the 4D Folder.

- Relaunch DVMAX.

- If the message "Duplicating Resources Locally" appears, the process has been done correctly.

⚠️ DVMAX must now rebuild a few files so the login process may take 2-3 minutes.

Clearing the Cache on Windows

- Select Search form the Start menu.

- Search for files and folder.

- Search for files and folders containing 4D.

- Locate the folder named 4D.

- Delete this folder.

- Relaunch DVMAX.

- If the message "Duplicating Resources Locally" appears, the process has been done correctly.

- DVMAX must now rebuild a few files, so the login process may take 2-3 minutes.

DVMAX Anywhere

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

Using Anywhere on Desktop and Tablet

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

Key differences include:

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

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

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

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

Launching DVMAX Anywhere

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

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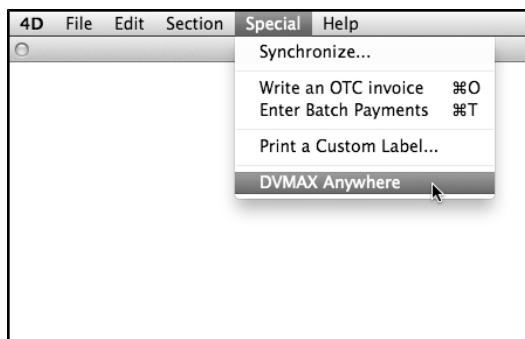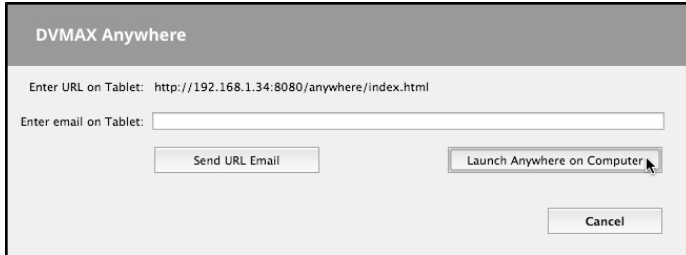
> From the **DVMAX Anywhere** dialog, choose whether to open Anywhere on your current desktop machine or on a tablet. The URL for Anywhere will be shown in the **Enter URL on Tablet** field. This URL can be used by desktop, laptop or tablet.

Open Anywhere on Desktop or Laptop

To open the desktop version of Anywhere:

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

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

Anywhere will open in your default browser.

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

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

Open Anywhere on Tablet
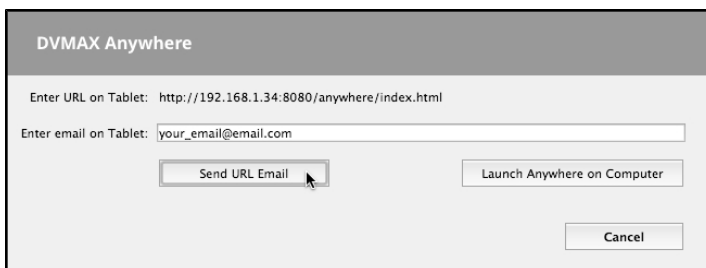
To open DVMAX Anywhere on your tablet:

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

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

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

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

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

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

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

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

Logging In to DVMAX Anywhere

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

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

To log out, click the **Logout** ("X") icon.
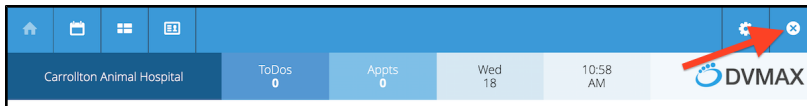
About the Anywhere Home Page

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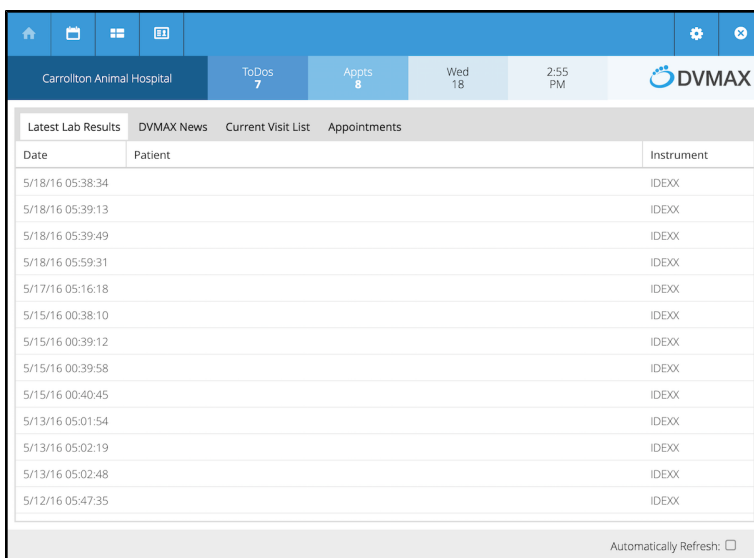
The **Labs** tab provides a list of lab result records. The default number of days of results shown is 7. This can be adjusted under **Advanced Settings**. Double click or touch on a result to view details.

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

Customize the Anywhere Home Page

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

To customize the tabs on the Home page:

- From the Home page, select a tab. If there is a **Customize** button, you can customize that tab. The Lab Results and News tabs are not customizable.

- Click **Customize**.

- In the **Title** field, type a short name for the tab.

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

- Click **OK** to save.

Refresh the Anywhere Home Page Content

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

About the Anywhere Main Menu

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

Anywhere Main Menu from Desktop or Laptop

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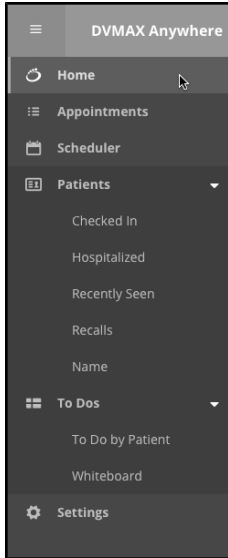
You can view the menu as text and icons or as icons alone by clicking the hamburger icon at the top left corner of the screen to hide/reveal text on the menu.

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

Anywhere Main Menu on Tablet

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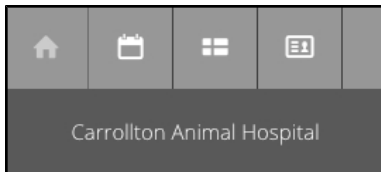
Navigating the Anywhere Main Menu

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

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

Select **Appointments** or the **Appointments** icon to view a list of Appointments (desktop only, not present in tablet mode).

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

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

Select **Patients** or **Patients** icon to search for and work with patient records.

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

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

Settings (Gear Icon)

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

Click the **Settings** (Gear) icon to open the Settings panel.
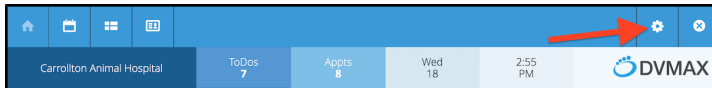
From the Label Printer menu, select your label printer.

Close the Settings panel.

⚠️

Note that DVMAX Client (the main DVMAX desktop application) must be running and shared label printing must be enabled in DVMAX in order for Anywhere to access shared Rx label printers.

Appointments Menu (Desktop Only)

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

Viewing Appointments By Staff (Desktop Only)

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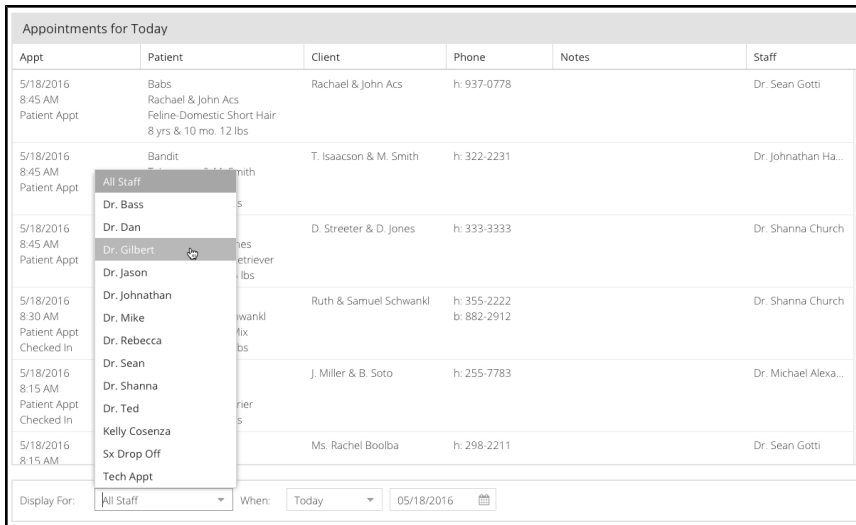
Viewing a List of Appointments by Date (Desktop Only)

The default view is to show Appointments for the current date and for all staff. Use the **When** filters to view appointments for a specified date or date range.

Choose **Today**, **Yesterday** or **Tomorrow** from the drop down menu, or select a date from the calendar field to see all appointments from the selected date forward (showing **every** appointment **Since** the selected date).

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

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

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

Appointment Scheduler in Anywhere

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

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

To work with the Scheduler:

> The Scheduler shows appointments for the current date by default. To adjust the date for the Scheduler, use the **Today**, **Yesterday** or **Tomorrow** buttons or specify a date by picking a date from the calendar field.

> Double click an appointment to view appointment details, patient and client information, just like in the DVMAX main app.

> You can set and change appointment status from the **Status** drop down menu on the Appointment details dialog.

> Click **Save and Open Patient Record** to open the patient record in Anywhere.

ℹ️

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

Appointment Scheduler Change Mode Option

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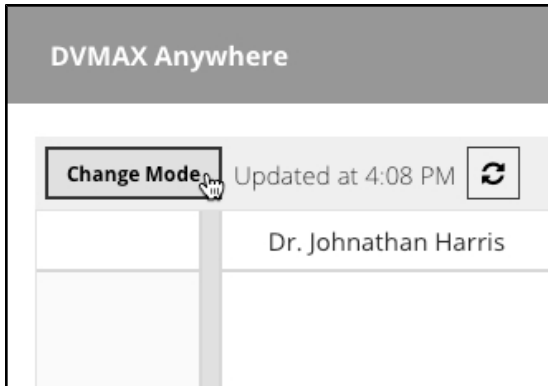
Appointment Scheduler Refresh

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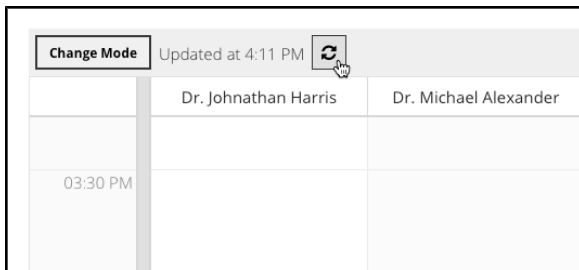

Searching for Patient Records in Anywhere

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

Searching for Patients with Checked In Status

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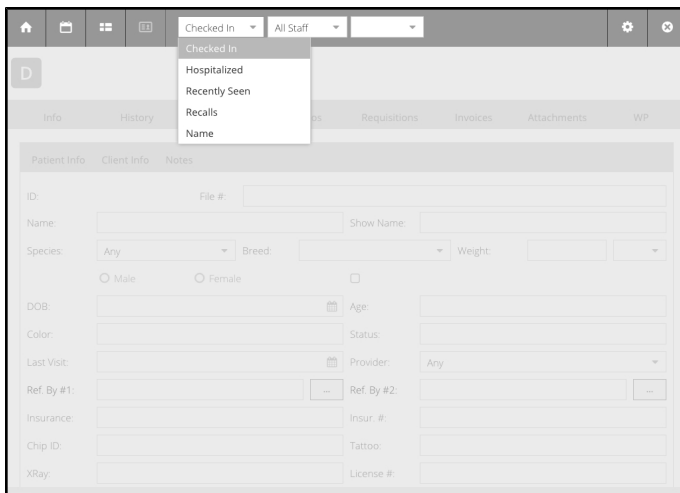
Patients by Checked In Status Search - Desktop

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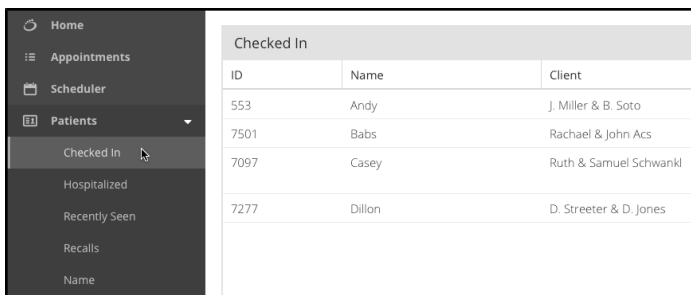

Patients By Checked In Status Search - Tablet

Select the **Patients** icon from the menu bar. A page opens with a blank patient record displayed. This record is not editable. From the **Type** menu, select **Checked In** to search for patients whose status is checked in.

Use the **Staff** filter to further narrow the search. From the list of names, select a record to view. If desired, type a patient name (or partial name) in the **Name** field, then select a name from the drop down list to open the patient record. If there are no Checked In records, the list will be blank.
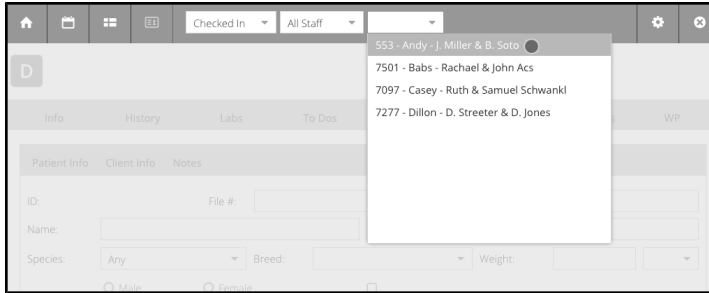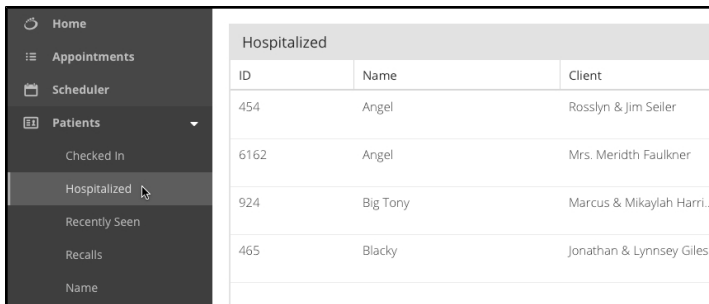
Searching for Patients with Status Hospitalized

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

Patients By Hospitalized Status Search - Desktop

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

Patients By Hospitalized Status Search - Tablet

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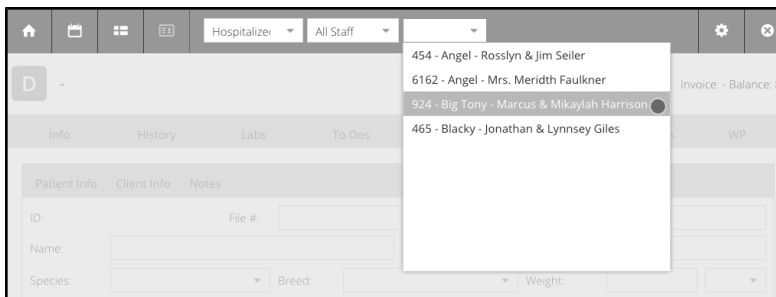
Use the **Staff** filter to further narrow the search. From the list of names, select a record to view. If desired, type a patient name (or partial name) in the **Name** field, then select a name from the drop down list to open the patient record. If there are no matching records, the list will be blank.

Searching for Patients By Recently Seen

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

Patients By Recently Seen Search - Desktop

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


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

Patients By Recently Seen Search - Tablet

Select the **Patients** icon from the menu bar. A page opens with a blank patient record displayed. This record is not editable. From the **Type** menu, select **Recently Seen** to search for patients who have been seen in the past 7 days. Use the **Staff** filter to further narrow the search.
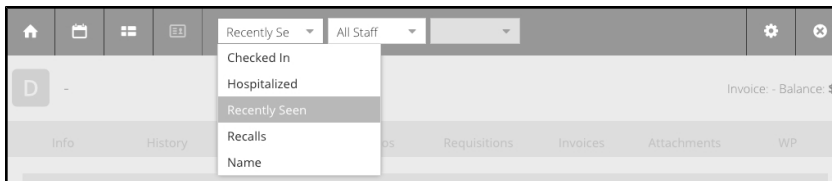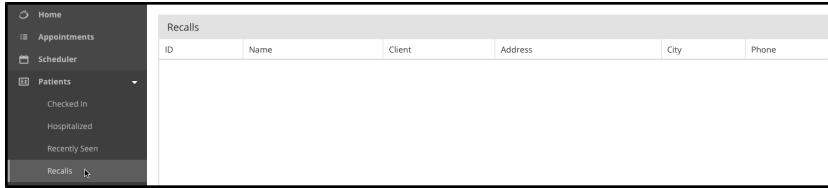

From the list of names, select a record to view. If desired, type a patient name (or partial name) in the Name field, then select a name from the drop down list to open the patient record. If there are no matching records, the list will be blank.

Searching for Patients with Recalls

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

Patients with Recalls Search - Desktop

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

Patients with Recalls Search - Tablet

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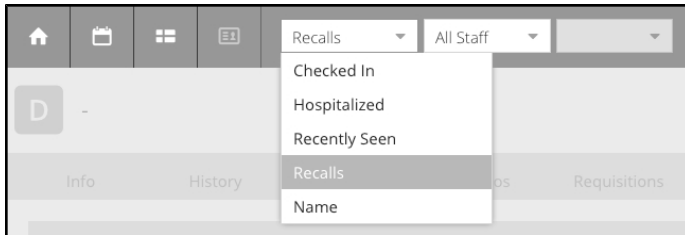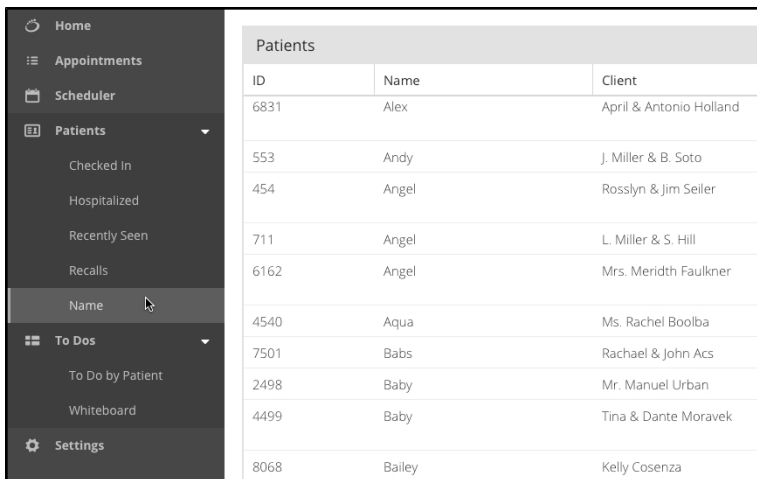

Searching for Patients By Name (All Patient Records)

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

Patients By Name Search - Desktop

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

To find a specific patient record:

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

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

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

Patients By Name Search - Tablet

To search for patient records by name, select the **Patients** icon from the menu bar. A page opens with a blank patient record displayed. This record is not editable.
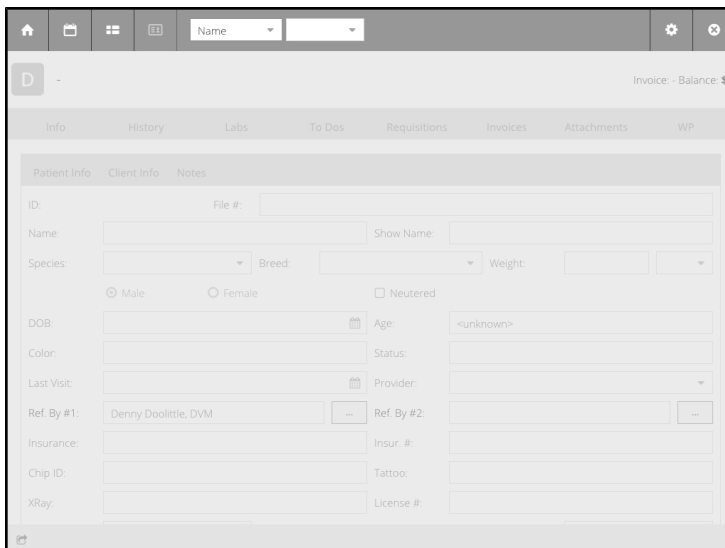
From the **Type** menu, select **Name** (default) to search all patient records by name. Type a patient name (or partial name) or client name in the **Name** field, then select a name from the drop down list to open the patient record.

Working with Patient Records in Anywhere

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

Open a Patient Record

To open a patient record:

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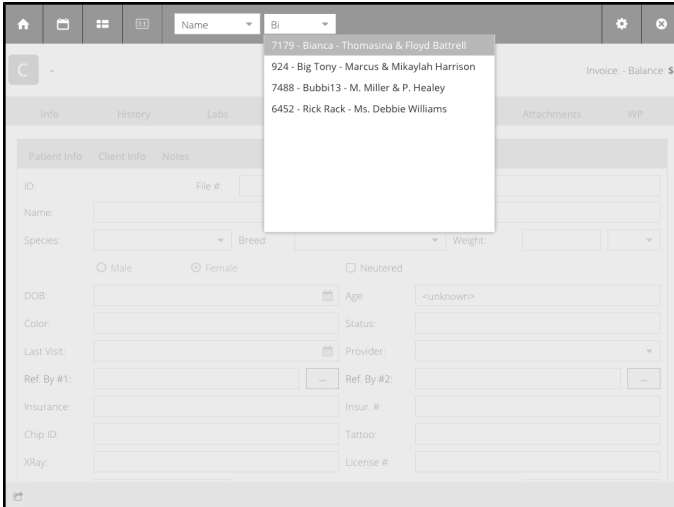
Select an Invoice

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

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

-OR-

- Choose **New Invoice** to begin a new invoice.
- Once you select an invoice, the patient record will open.
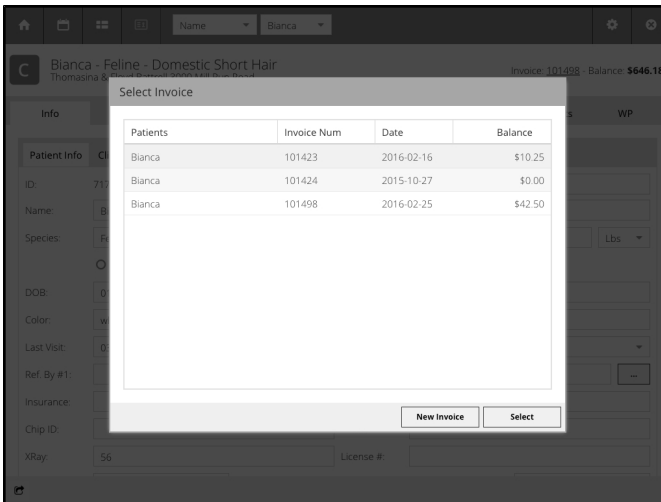
View the Select an Invoice Dialog

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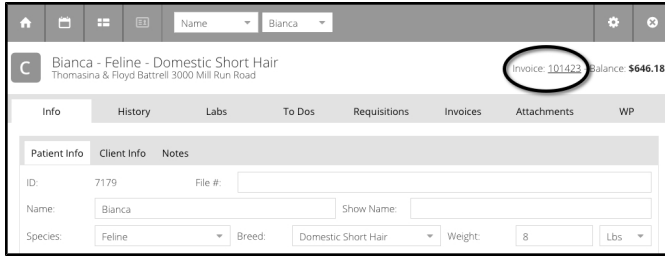
About the Patient Record

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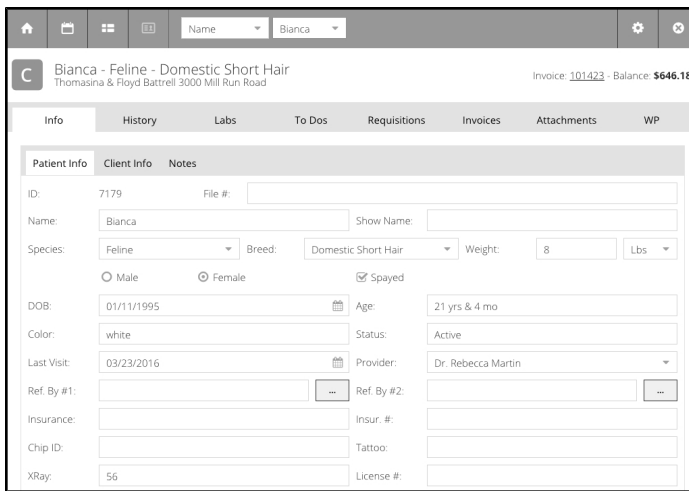
You navigate the patient record much the same way as in DVMAX client. Keep in mind that from a tablet, you may not see the full screen and you may need to scroll up and down to see the full panel in some cases. Alternatively, you may want to rotate the tablet between landscape and portrait modes to maximize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

Sharing Patient Information Via Email

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

- Click the **Share** icon, located in the bottom left corner of the patient record.

- In the Email Address dialog, enter the email address of the recipient in the **Email** field and click **OK**. An email with the link to the patient record will be send to the email recipient.

Patient General Info Tab

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

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

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

- **Recalls** and **Reminders** appear at the bottom of the **Patient Info** screen, just like in DVMAX. You will also see these areas at the bottom of the **Client Info** page and **Notes** page. You can sort the Reminders and Recalls areas by ascending or descending Date or Reminder/Recall name by clicking the header.

- **Referral Source** - Click the box beside the **Referral** field to see a list of referral sources. Select from the list.

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

Client General Info Tab

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

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

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

Notes Tab

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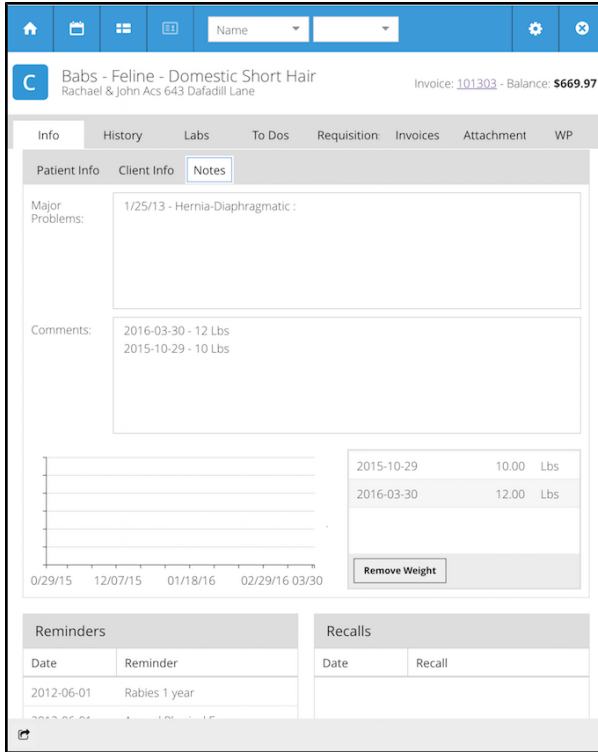
History

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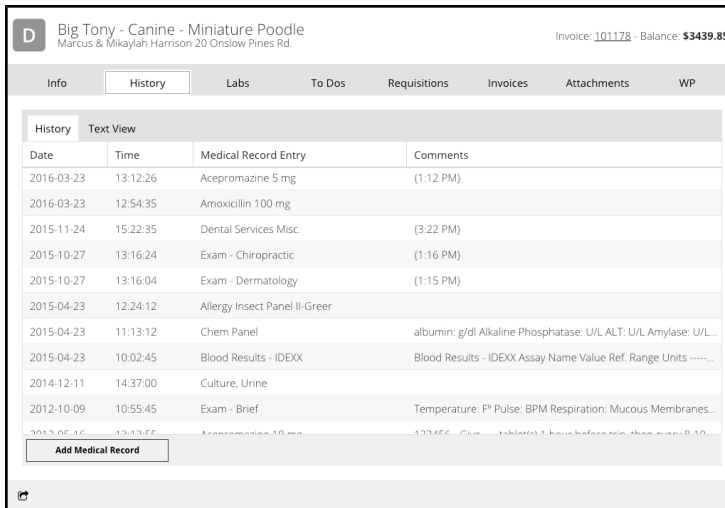
Text View

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

- Click or touch to select an MRE in text view. This will open the associated full MRE record. You can view or edit the MRE. Close the MRE to return to text view.
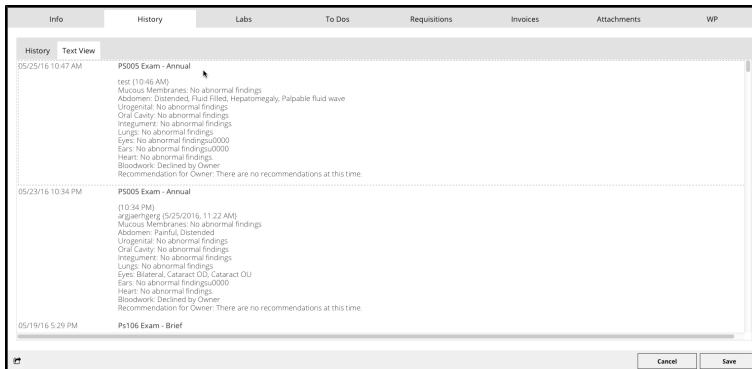
- You can use your browser's Print function to print the text view.

View an MRE

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

Add an MRE

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

To create a new Medical Record Entry:

- Click Add MRE.
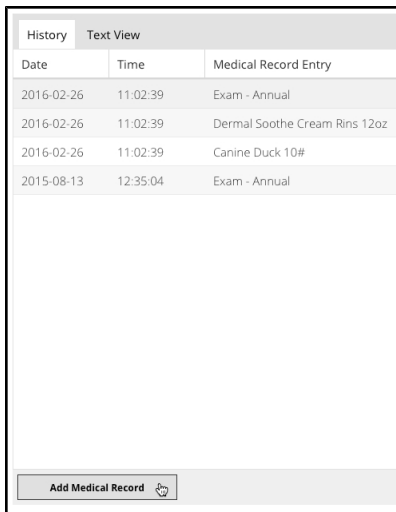
- The MRC dialog is divided into 2 parts, the MRC Categories list and the MRC Code and Description. By default, Anywhere displays a list of the most commonly used MRCs. Select a different category to view other MRC lists, or choose **All** for a list of all MRCs.
- From the Select MRC dialog, choose the item you wish to add.
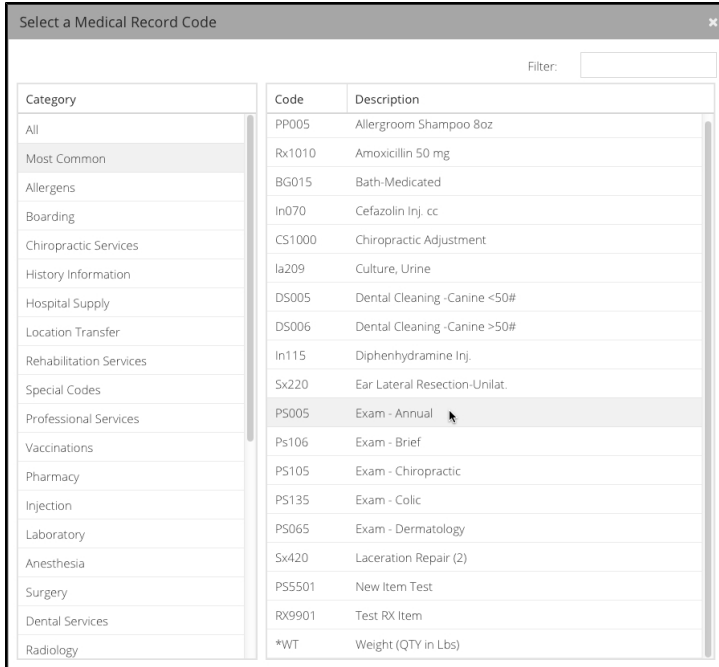
- Use the **Filter** field to search by Code or Description. Remember, Anywhere will search for matching keywords or codes only in the MRC Category selected.
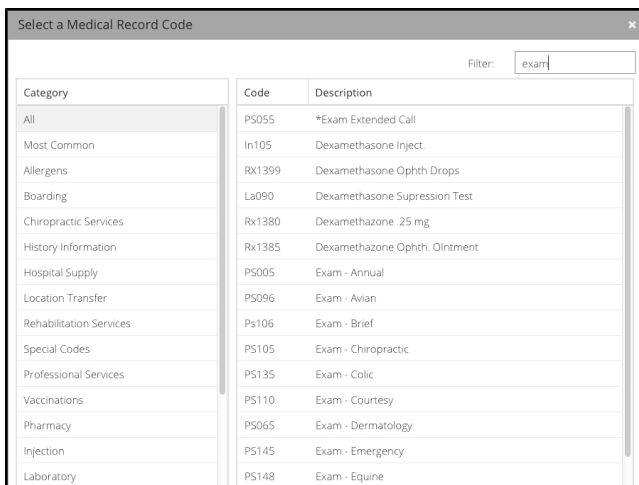
- In the MRE dialog, enter Findings and Comments as applicable.

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

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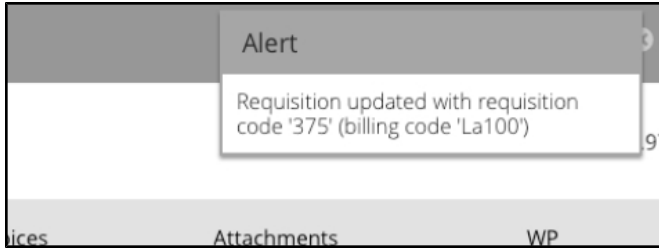
MRE Findings and Options

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

- Type comments in the **Comments** field.

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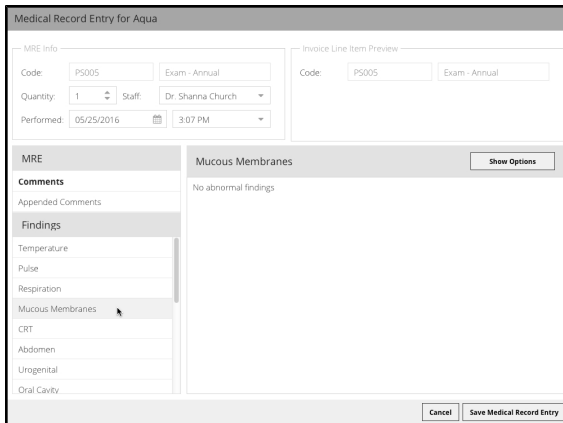
- If the Finding item has associated options, a **Show Options** button will be displayed. Click or tap **Show Options** to see Finding Options.
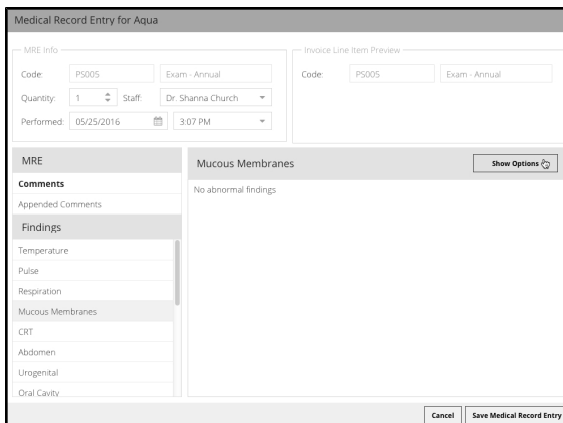
- Select the appropriate Finding Options from the list, then click or tap **Use Selected Options**. Choose **All** if you want to select all options. Choose **None** to deselect any selected options.
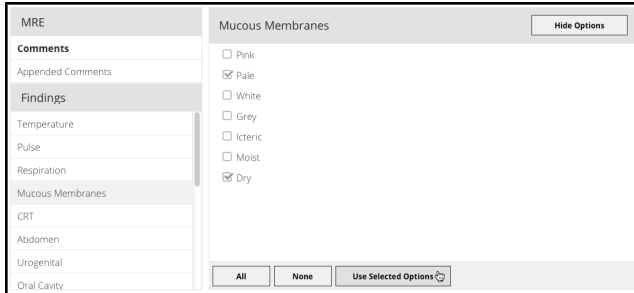
Create and Print Rx Labels in Anywhere

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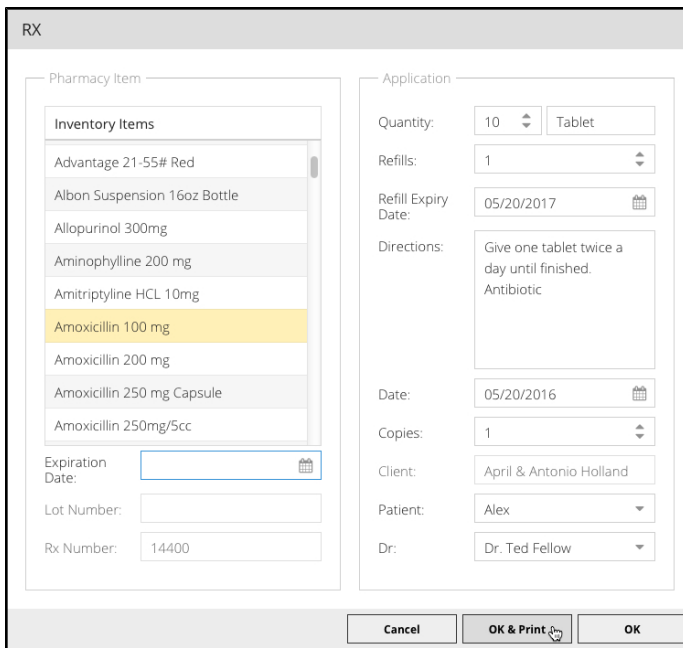
Labs

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

To Dos

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

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

View a To Do

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

Complete a To Do

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

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

-OR-

- Double click/tap to open the To Do record.

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

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

Requisitions

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

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

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

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

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

Invoices

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

View an Invoice

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

Edit an Invoice

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

View Finished Invoices

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

Attachments

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

To view an attachment:

- Click/tap the record you want to view.
- The Attachment record opens.
- Click **View Attachment**.
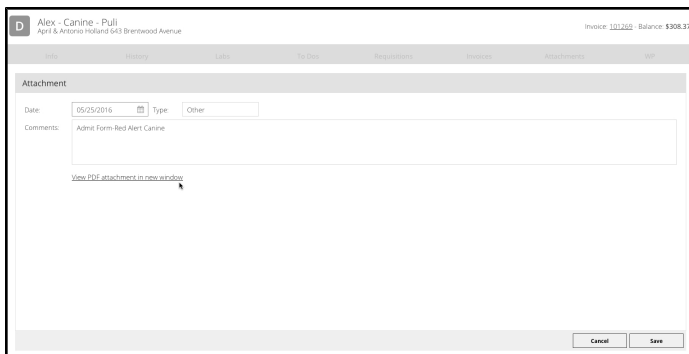
For more on working with attachments, see the associated section in the **Patients** chapter of the DVMAX user guide.

WP Documents

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

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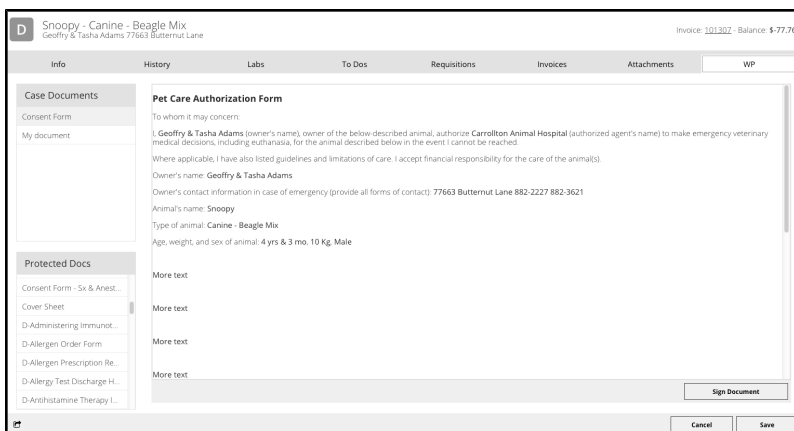
Convert a Protected Document to a Case Document

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

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

- Click **Convert Protected Document**.

- The converted document will appear in the Case document list.

Sign a Consent Form or Document

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

To present a document for signature:

- From the list of Case documents, select the form or document you would like to have signed.

- When you select the document, the contents will display in the preview area on the right side of the screen.

- Click Sign Document. A signature capture area opens at the bottom of the preview pane.

- Sign the document using the mouse (desktop) or stylus (for touch devices, like a tablet).

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

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

To Dos Menu (Desktop Only)

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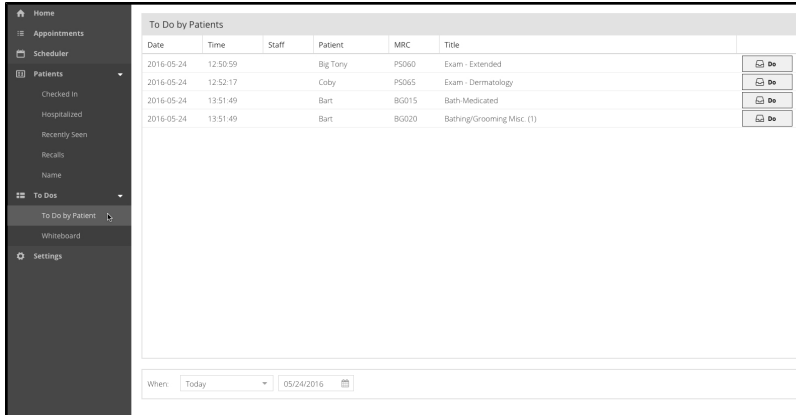
Note that To Do items are added in DVMAX by creating Treatment Plans. Refer to the associated section in the DVMAX user guide for more on creating Treatment Plans.

Search for To Do Items

To search To Do items from the To Do list:

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

-OR-

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

View a To Do

To view a To Do item:

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

- The To Do dialog opens.

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

Complete a To Do

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

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

-OR-

- Double click to open the To Do record.
- From the To Do item detail dialog, select the **Completed** checkbox, then click **OK** on the To Do dialog.

- A linked MRE dialog will open. Add MRE Findings and Comments as needed and click **Save** to save the MRE.
- Once the MRE is saved, Anywhere will return you to the To Do list.

About the Whiteboard

The Whiteboard gives you a view of the To Do activities for a single day. The default view is the current date. Green blocks on the Whiteboard blocks represent pending To Do items. Completed Whiteboard items are shown as grey blocks.

You can complete to do items and/or go to patient records from the Whiteboard. Completing a To Do item from the Whiteboard creates an MRE.

Choosing a Date From the Whiteboard

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

View a Patient Record from the Whiteboard

From the **Patient** column on the Whiteboard, click on a patient name. This will open the patient record.

You can work with the record as you like, including going to the To Do tab of the patient record to view or complete any To Dos associated with the record. When you close the patient record, you will be returned to the Whiteboard.

View To Dos from the Whiteboard

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

view a To Do item from the Whiteboard:

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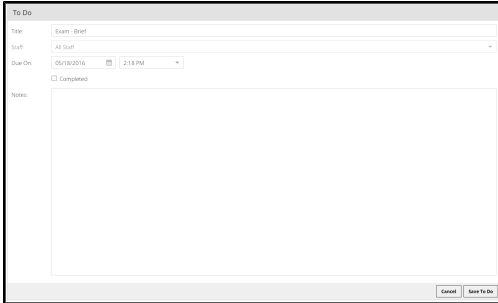
- If the block you select represents multiple To Do items ("Multiples"), a list of the To Dos will display. Select an individual item from the list to view the To Do item details.

Multiple To Dos on the Whiteboard

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

Completing To Dos from the Whiteboard

To complete a To Do item from the Whiteboard:

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

- If the block you select represents a single To Do item, a To Do item record will open. Select the **Completed** checkbox, then click **OK** on the To Do dialog.
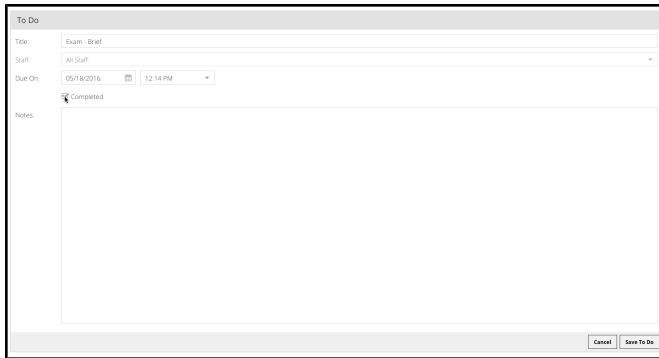
- If the block you select represents multiple To Do items ("Multiples"), a list of the To Dos will display. You must complete each item on the list individually. Double click the To Do item on the list that you want to complete. A To Do item record opens. Select the **Completed** checkbox, then click **OK** on the To Do dialog.

- Once you choose **Completed** on the To Do record and click **OK**, linked MRE dialog will open. Add MRE Findings and Comments as needed and click **Save** to save the MRE.

- Once the MRE is saved, Anywhere will return you to the Whiteboard.

Refresh the To Do List

The Whiteboard is automatically refreshed every minute. Click the **Refresh** button to manually refresh the scheduler.

Appointments

The Appointment Scheduler lets you create, view and modify appointments for new or existing clients and patients. The flexible features include letting you "click and drag" to quickly create appointments, switch between a variety of scheduler views, track appointments for one or more staff and find the next scheduled appointment for a client or patient. You can access a client or patient record associated with any appointment directly from the Appointment Scheduler, letting you get important information easily and efficiently.
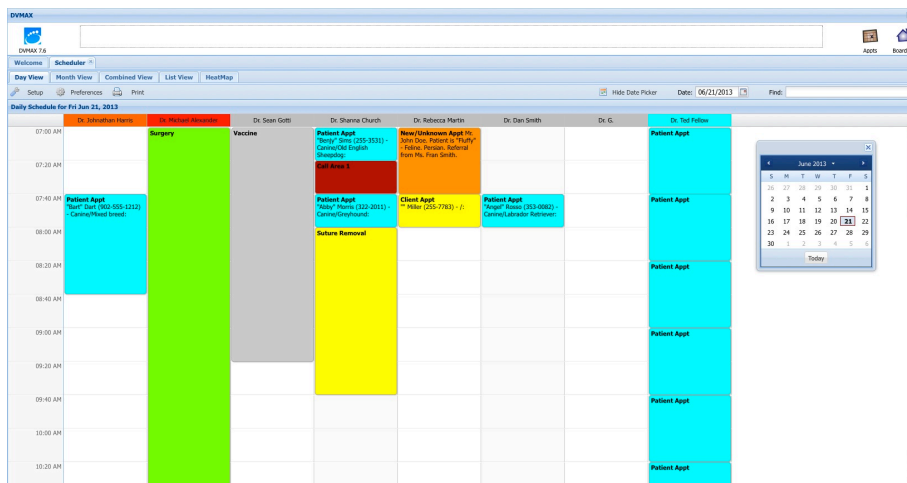
In addition to standard appointment features like the Day View, the web-based Scheduler gives you features like Month View, List View, patient/client Check In, expanded reporting and the ability to copy, cut and paste appointments.

Appointment Scheduler Setup for MPA and Multi-Site Schedules

Beginning with DVMAX v8, MPA practices can now view and work with schedules for all of the clinics associated with the multi-site practice. Each clinic in the multi-site practice will configure their own scheduler using the details in the Setup sections of this chapter.

For more information on setup for MPA, contact DVMAX Technical Support.

Opening the Appointment Scheduler

DVMAX lets you open the Appointment Scheduler three different ways. When you launch the Appointment scheduler, it will open as an embedded browser window within DVMAX (default setting). To open the Appointment Scheduler:

- Click the **Appointments** icon on the **Command Palette**.
- From a client record, choose **Set Appointment** under the **Clients** drop-down menu.

- From a patient record, choose **Set Appointment** under the **Patients** drop-down menu.

⚠️ The Appointment Scheduler opens as an embedded browser within DVMAX. While it is not the recommended option, you can choose to open the Scheduler in an external web browser. See *Defining the Default Browser for Appointments*.

Defining the Default Browser for Appointments

The Appointment Scheduler and Boarding Scheduler open in a browser within DVMAX. This is the default setting and is recommended for optimal performance. You can choose to have DVMAX open the scheduler in an external browser.

To change the default browser for Appointments and Boarding:

- From the **File** menu on the DVMAX main window, choose **Preferences**.

- From **Preferences**, choose the **Assorted Prefs** tab.

- In the Appointment Scheduler/Boarding area, use the **Open With** drop down menu to select the browser you would like DVMAX to use to open Appointments and Boarding. This can be Internal (default) or another browser you have available on your terminal (such as Internet Explorer, Firefox or Chrome).

- The recommended (default) selection is **Internal**. This permits DVMAX to open the Appointment Book within DVMAX and is the only setting that will enable the Scheduler to show in the **Window List**.

- You can have the scheduler open in an external web browser. Use the drop down list to designate another browser available on your terminal for the Scheduler.

⚠️ For optimal performance, it is strongly recommended that you use the **Internal** setting for the Scheduler. If you choose to display the Scheduler in an external browser, you should select a browser for use by the scheduler that is different from your system default browser. For example, if your workstation's default internet browser is Safari, select a browser other than Safari in which to open the Scheduler.
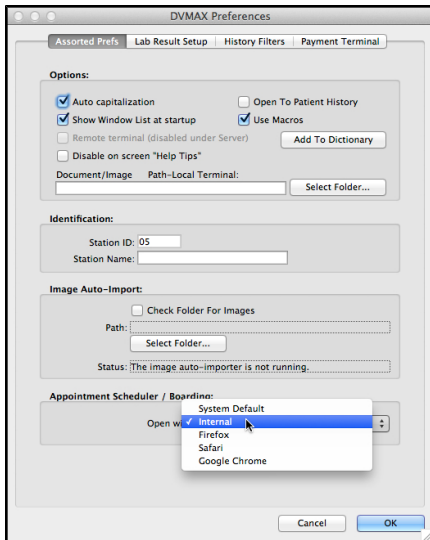
Opening the Appointment Scheduler from the Window List

Once the Scheduler is open, you can access the Appointment Scheduler quickly by clicking **Scheduler/Boarding** from the Window list.
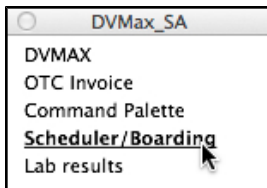
 The Window List will show **Scheduler/Boarding** when the Appointment Scheduler is open, the Boarding Scheduler is open, or both the Appointment and Boarding schedulers are open.

 In order to see the Scheduler in the Window list, the scheduler must be open. **Scheduler/Boarding** will only appear in the Window List if you use the default selection, **Internal**, under **File ->Preferences**.

 For optimal Appointment Scheduler performance, it is strongly recommended that you use the **Internal** setting (default setting) for the Scheduler. If you choose to display the Scheduler in an external browser, you should select a browser for use by the scheduler that is different from your system default browser. For example, if your workstation's default internet browser is Safari, select a browser other than Safari in which to open the Scheduler. Note that the Scheduler will not display in the Window list if you open the Scheduler in an external browser.

Opening the Appointment Scheduler from the Command Palette

You can access the **Appointment Scheduler** quickly by selecting the **Appts** icon from the **Command Palette**.

ℹ️ If you cannot see the **Command Palette**, select **Command Palette** from the **Window List**.

Opening the Appointment Scheduler from Set Appointment

You can create an appointment directly from the client or patient record. If the Scheduler is not already running, this process will launch the scheduler as well as allow you to create the client or patient appointment.

To open the **Appointment Scheduler** from a client or patient record:

- From a patient record, click **Set Appointment** under the **Patient** menu.

- From a client record, click **Set Appointment** under the **Client** menu.
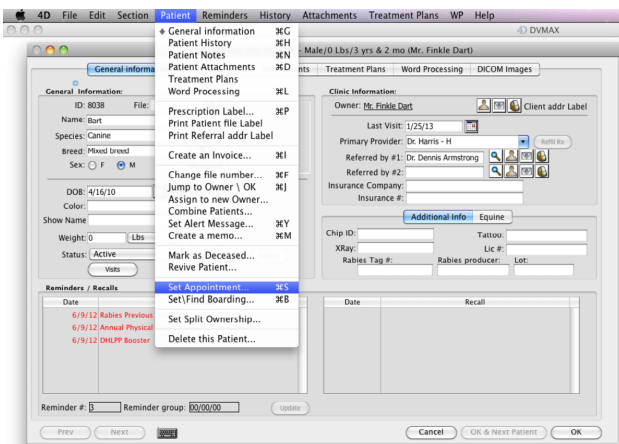
- The Scheduler will open.

- At the top of the Scheduler dialog, there will be text indicating that the next scheduled appointment will be for the Client or Patient for which you wanted to create the appointment.
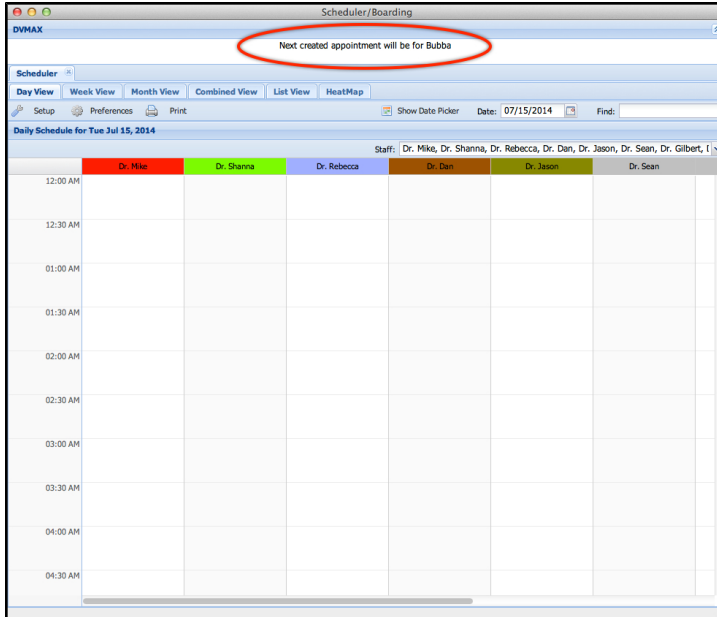
- When you click and drag to create the appointment, the applicable patient and/or client information will be pre-filled in the **Patient Info** and/or **Client Info** sections of the appointment detail dialog. More details on creating appointments are provided under *Creating an Appointment for an Existing Client or Patient*.
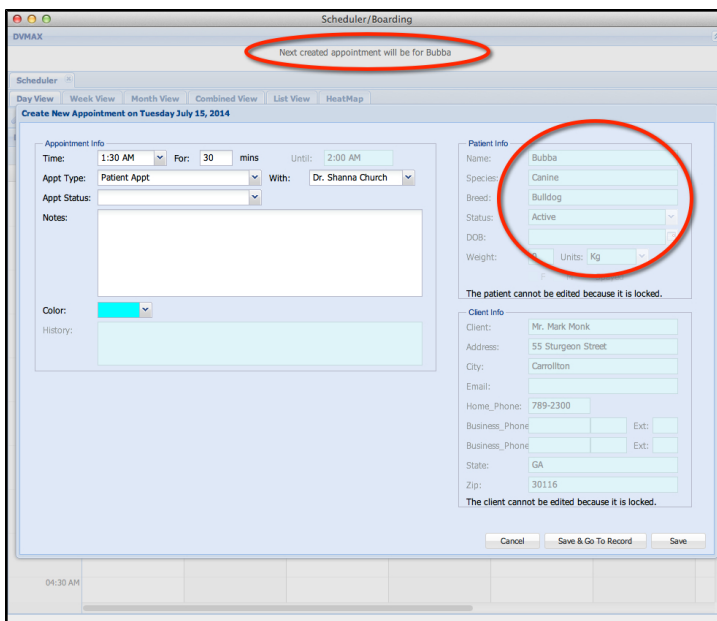
Setting Up the Appointment Scheduler

Before you can use the **Appointment Scheduler** for the first time, you need to define **Appointment Types** (the kinds of appointments you want to be able to schedule) and **Appointment Staff**

(the staff and resources for which you will need to schedule appointments). You can also define **Appointment Status** records. You define all of these from **Setup** on the **Appointment Scheduler**.

As well, several other **Appointment Settings** must be set up, including **Start of Day**, **End of Day**, **Default Appointment Type**, **Initial Appointment Color**, **Default Appointment Color** and **Minimum Appointment Time**. These are also configured from **Setup** on the Scheduler. **Advanced Appointment Settings** include areas for defining the templates for Day and Month view appointment labels and ToolTips display.

General Appointment Settings

General Appointment Settings are details that apply to the regular structure of the Appointment Scheduler and must be defined before the Appointment Scheduler can be used. These are typically defined during initial DVMAX installation, but can be modified at any time by users with appropriate access permissions.
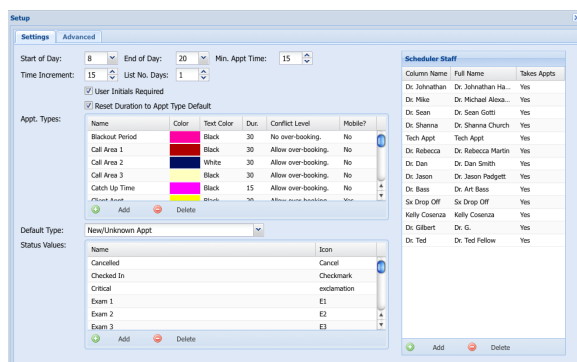
To adjust the Appointment Settings:

- From the **Appointment Scheduler**, click **Setup**.

- From the **Appointment Settings** tab, adjust the individual settings as needed.

- Click the "**x**" in the top right corner of the **Setup** window to save the Appointment settings.

⚠️ You will need to close and reopen the Appointment Scheduler after making changes **Setup**.

Start of Day General Appointment Setting

Use the **Start of Day** and **End of Day** options to define the hour when you want the Scheduler to begin and end. The time must be on the hour, it cannot be on the half or quarter hour. For a 24 hour clinic, set the Start of Day to 0 and End of Day to 24.

To set the **Start of Day**:

- From the Scheduler, click **Setup**.

- From **Settings**, select a start time from the **Start of Day** drop down list. This represents the start time for the first available appointment of the day on the Appointment Scheduler.
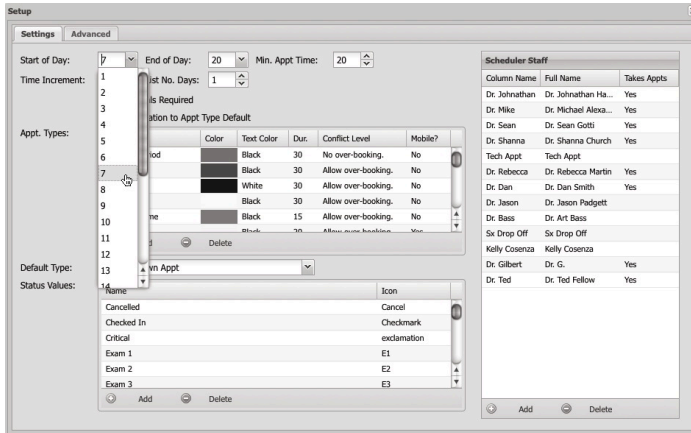
The **Start of Day** value must not be greater than the **End of Day** value. For a 24 hour clinic, set the Start of Day to 0 and **End of Day** to 24.

End of Day General Appointment Setting

Use the **Start of Day** and **End of Day** options to define the hour when you want the Scheduler to begin and end. The time must be on the hour, it cannot be on the half or quarter hour. For a 24 hour clinic, set the Start of Day to 0 and End of Day to 24.

To set the **End of Day**:

- From the Scheduler, click **Setup**.

- From **Settings**, select an end time from the **End of Day** drop down list. This represents the end time for the last available appointment of the day on the Appointment Scheduler.
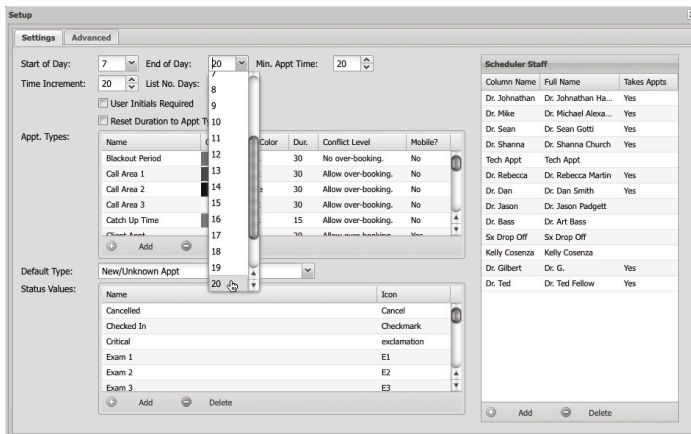
⚠ The **Start of Day** value must not be greater than the **End of Day** value. For a 24 hour clinic, set the Start of Day to 0 and **End of Day** to 24.

Minimum Appointment Time General Setting

The value in the **Min. Appt Time** field defines the minimum length of an appointment you can draw on the scheduler.

- In the **Min. Appt Time** field, type the default minimum length of a standard appointment in minutes or use the up and down arrows to adjust the value. *The* **Min. Apt Time** *value cannot be less than 5 minutes.*

⚠ It is strongly recommended that you consider this **Min Appt Time** value as you define the duration for **Appointment Types** and the **Time Increment** setting.

ⓘ The Min. Appt Time value cannot be less than 5 minutes.

ⓘ Minimum Appointment length and Scheduler **Time Increment** are defined separately. See *Time Increment General Appointment Setting* for more information.

Time Increment General Appointment Setting

The value in the **Time Increment** field determines the intervals between rows on the Appointment Scheduler. For example, if you use an **Increment** of 20, then the Appointment grid will be divided into 20-minute blocks. Of course, actual appointment length can be easily adjusted when creating an appointment (see sections on creating and modifying appointments for more information).

- In the **Time Increment** field, type the increment value for the Appointment grid in minutes or use the up and down arrows to adjust the value.

List Number of Days General Appointment Setting

The value in the **List No.of Days** field determines how many days of appointments will be shown from the **List View** tab on the **Appointment Scheduler**. The default value is 1 (the current day).

- In the **List No. of Days** field, type the number of days of appointments you want displayed from **List View** on the Scheduler, or use the up and down arrows to adjust the value.

User Initials Required Appointment Setting

- If you want user initials to be required when creating, editing or deleting appointments, select **User Initials Required**. When an appointment is created or when changes are made to an existing appointment, the user will be prompted to enter their staff code when they OK the changes.
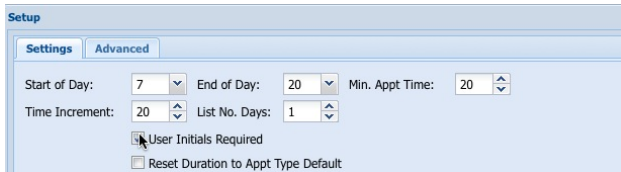
The Staff Code can be viewed or edited from **Section** -> **Patient Codes** -> **Staff**. This is NOT related to the Appointment Staff record (see *Setting Up Appointment Staff* for more on Appointment Staff records).

This setting must be enabled in order to use the **Appointment Change History** report.

Reset Duration to Appointment Type Default

Every **Appointment Type** has a default duration, defined when the **Appointment Type** record is created. However, it is possible to create an appointment outside of the default length, either by "click and drag" or by typing in a time value.
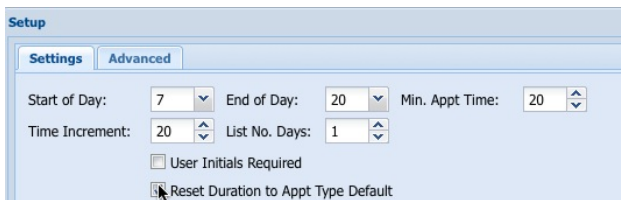
If **Reset Duration to Appointment Type Default** is selected, you are still able to create an appointment longer than the default duration, but if you then change the appointment type on the Appointment Detail dialog, the appointment length will be reset to the default value for that appointment type.

Setting Up Status Values

Status values allow users to define the state of an appointment. An appointment or clinic visit begins with **Check In** and you can change the status of an appointment as the patient moves from the waiting room, for example, to an exam room to a treatment room. A status value can be selected from an appointment detail dialog or by right clicking on an appointment.

Viewing All Status Values

To view the list of all Status Types:

- Select **Setup** from the **Appointment Scheduler**.
- Status Values are listed under the **Status Values** section of Setup.
- Click **Add** to create a new **Status** record. Refer to *Adding a New Status Value* for more information.
- Double click the name of the **Status Value** record you want to edit from the list.

The Status Values List

The **Status Values** list displays **Name** (Status Value Name), **Color** (Status Color) and **Icon** (visual marker placed on the appointment label).

Sorting the List of Status Types

The list of Status Values can be sorted by any of the column headings on the list.

To sort the list of Status Values:

- From the list area, click on the column heading by which you would like to sort the list.
- From the drop down menu, choose to sort the list by the column heading in Ascending or Descending order by selecting **SortAscending** or **Sort Descending** from the menu.

Display or Hide Columns from the Status Values List

The Status Values list displays with a set of default columns. It is possible to hide the display of columns. To display or hide columns from the list:

- From the records list, move your pointer or "mouse over" the heading of a column on the list.
- Note that there is an arrow on the right side of the column heading. Click on the arrow to display the drop down menu.
- Click **Columns** from the menu to see the list of columns that can be displayed or hidden.
- Click on an item to select it and have it appear on the list. An item is selected if there is a checkmark in the box beside the column name.

- To hide a column so that it does not appear on the list, click the associated checkbox to remove the mark from the box. An item is hidden or deselected if there is no checkmark in the box beside the column name.

Adding New Status Values: An Overview

To create a new status record:

- Click **Add** from below the **Status Value** list under Appointment Setup.

- Enter new appointment type information.

- Click **Update** to save the new **Status Value** record.
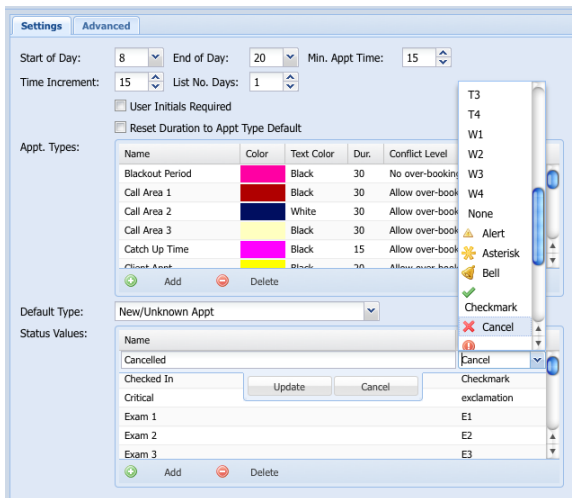
Status Value Information

The following information needs to be added for new status values. You can also use these steps to edit existing records.

- Click **Add** to create a new Status Value or double click an existing record to edit the record.
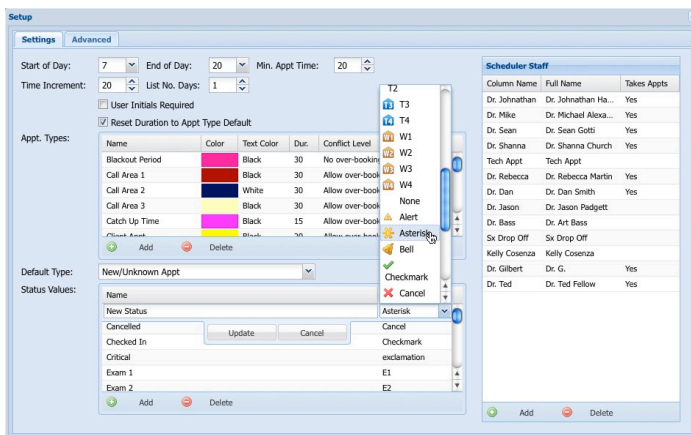
- Type a Status Value **Name**. This is the Status Value label as it will display on the **Status** drop-down menu when you right click (or Ctrl + click) and appointment and choose **Set Status**, as well as the name that will show on the **Status** drop-down list in the **Appointment** detail window when creating or editing an appointment.

- Choose a status **Color**. The default color is gray. Status colors can determine appointment color through the **Initial** and **Default Color** settings.

- Choose a status value **Icon**. The icon will display on the appointment label on the Scheduler, and provides a quick visual indication of the current status of the visit. If you do not want an icon for the status record, chose **None**.

- Click **Update** to add the new status value or save any changes you made to the record.

Editing Status Values

To view or edit an existing **Status Value**:

- Double click the record you want to edit from the **Status Value** list.

- The record can be edited when you see the **Update** and **Cancel** buttons below the record on the list. You can change **Name**, **Color** and **Icon**. Follow the process described in the section titled *Status Value Information* for details.

- Click **Update** to save the changes or **Cancel** to revert changes.

Deleting Status Values

All Status Value records can be deleted. Exercise caution when deleting these records, as it may leave other records or aspects of DVMAX incomplete.

To delete a **Status Value**:

- From the Status Value list, click to select the record you wish to delete.

- Click Delete from below the Status Value list.

- In the **Confirm** window, click **OK** to continue or **Cancel** to abort the delete.

- The selected Status Value record will be deleted.

Setting Up Appointment Types

You need to define the types of appointments that can be scheduled by the Appointment Scheduler. Some of these Appointment Types are defined for you during the DVMAX installation, but you may want to include additional types of appointments (see also *Selecting Appointment Types* under *Appointment Detail Window*).
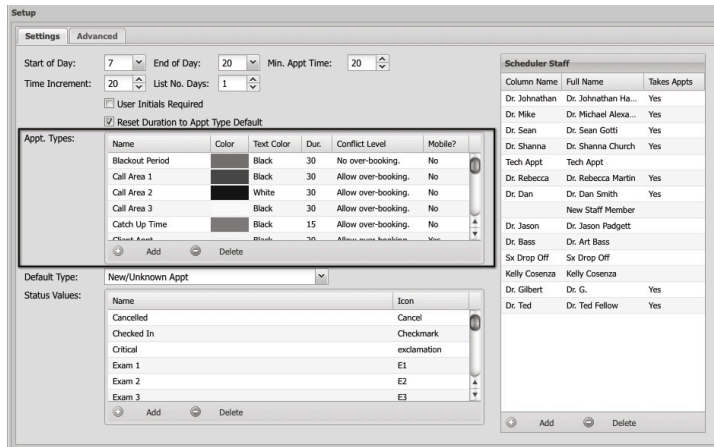
As well, you can create Appointment Types that can be used for staff scheduling entries under Scheduler Staff Dr. Weekly and Recurring schedules (see those sections for more information).

Viewing All Appointment Types

To view the list of all Appointment Types:

- Select **Setup** from the **Appointment Scheduler**.

- Appointment Types are listed under the **Appt. Types** section of Setup.

- Click **Add** to create a new **Appointment Type** record. Refer to *Adding a New Appointment Type* for more information.

- Double click the name of the **Appointment Type** record you want to edit from the list.

The Appointment Types List

The **Appointment Types** list displays **Name** (Appointment Name), **Color** (the default color of the appointment when used on the scheduler), **Text Color** (the color of the font or text on the appointment label), **Duration** (default length of the appointment), **Conflict Level** (whether over-booking is permitted) and **Mobile** (whether this type of appointment can be displayed on mobile devices). (See the sections titled *Appointment Type Information* and *Editing Appointment Labels* for more on these headings).

Sorting the List of Appointment Type Records

The list of Appointment Type records can be sorted by any of the column headings on the list.

To sort the list of Appointment Type records:

- From the list area, click on the column heading by which you would like to sort the list.

- From the drop down menu, choose to sort the list by the column heading in Ascending or Descending order by selecting **SortAscending** or **Sort Descending** from the menu.

Display or Hide Columns from the Appointment Type List

The Appointment Type record list displays with a set of default columns. It is possible to hide the display of columns. To display or hide columns from the list:

- From the records list, move your pointer or "mouse over" the heading of a column on the list.

- Note that there is an arrow on the right side of the column heading. Click on the arrow to display the drop down menu.

- Click **Columns** from the menu to see the list of columns that can be displayed or hidden.

- Click on an item to select it and have it appear on the list. An item is selected if there is a checkmark in the box beside the column name.

- To hide a column so that it does not appear on the list, click the associated checkbox to remove the mark from the box. An item is hidden or deselected if there is no checkmark in the box beside the column name.

Adding New Appointment Types: An Overview

To create a new Appointment Type record:

- Click **Add** from below the **Appointment Types** list under Appointment Setup.

- Enter new appointment type information.

- Click **Update** to save the new **Appointment Type** record.

Appointment Type Information

The following information needs to be added for new appointment types. You can also use these steps to edit existing records.

- Click **Add** to create a new Appointment Type record or double click an existing record to edit the record.

- Type an Appointment **Name**. This is the appointment name as it will display on the **Appointment Scheduler**, as well as the name that will show on the

Appointment Type drop-down list in the **Appointment** detail window when creating or editing an appointment.
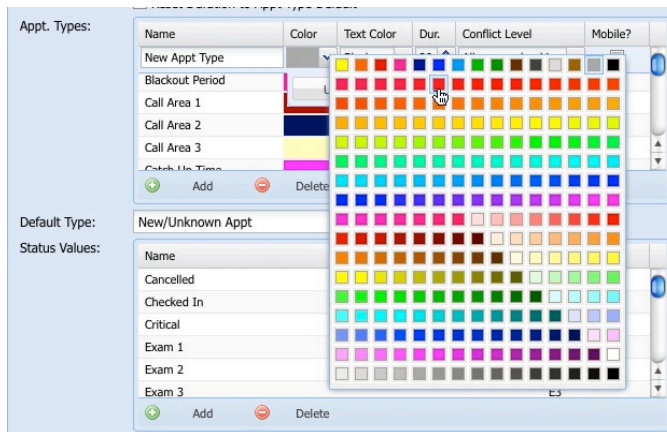
- Select a default color for this appointment type from the **Color** menu. This will be the default color of all appointments scheduled with the selected appointment type. Each appointment type can have its own appointment color. The default color is gray. **Appointment Type** colors can determine appointment color through the **Initial** and **Default Color** settings.

- Select black or white from the **Text Color** option list.

- Type a default appointment length, or duration, for this type of appointment in the **Dur.** field. You can use the up and down arrows to adjust the duration as well.

- Choose a **Conflict Level**. This determines the level of overbooking that is allowed for the selected appointment type. There are three options for conflict level: Allow over-booking, Allow but warn (provides a warning if you are over-booking but will permit over-booking) and No over-booking.

- Select **Mobile** to permit this appointment type to be viewed from mobile devices (such as when working with the DVMAX Anywhere mobile app).

- Click **Update** to add the new appointment type or save any changes you made to the record.
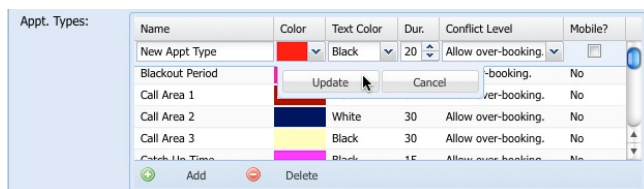
Editing Appointment Types

To view or edit an existing **Appointment Type** record:

- Double click the record you want to edit from the **Appointment Type** list.

- The record can be edited when you see the **Update** and **Cancel** buttons below the record on the list. You can change Appointment **Name**, **Color**, **Text Color**, Duration (**Dur.**), **Conflict Level** and **Mobile** permission. Follow the process described in the section titled *Appointment Type Information* for details.

- Click **Update** to save the changes or **Cancel** to revert changes.

Deleting Appointment Type Records

All Appointment Type records can be deleted.

⚠ Exercise caution when deleting these records, as it may leave other records or aspects of DVMAX incomplete.

To delete an Appointment Type record:

- From the Appointment Types list, click to select the record you wish to delete.

- Click Delete from below the **Appointment Type** list.

- In the **Confirm** window, click **OK** to continue or **Cancel** to abort the delete.

- The selected **Appointment Type** record will be deleted.

Default Appointment Type

From the **Default Type** drop down list, select the default appointment type to use when creating a new appointment on the Scheduler. You can change the appointment type from the **Appt. Type** menu on the appointment detail dialog, but DVMAX assigns a default value to all newly created appointments.
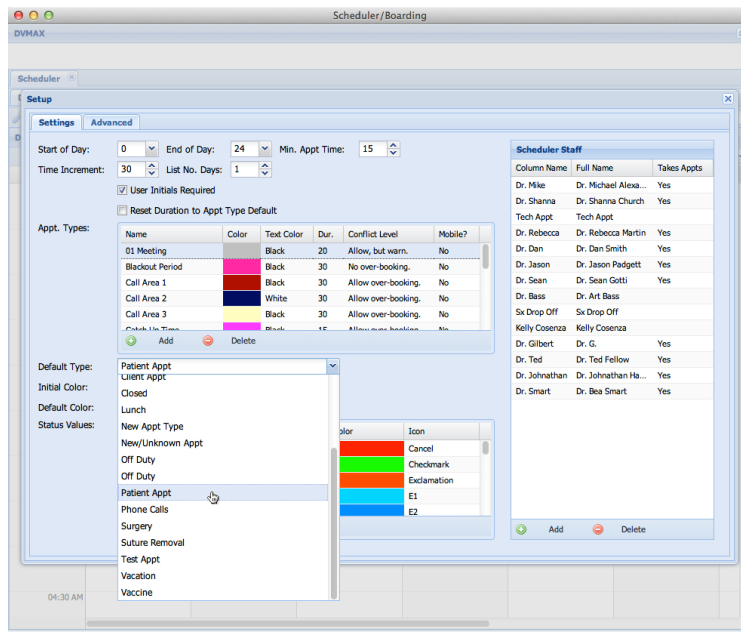
Initial and Default Appointment Color

The Initial Color and Default Color menus under Appointment Setup let you decide how the color of an appointment should be determined. Depending on your clinic's preference, the color of a new appointment made on the Scheduler can be decided based on one of the following. Once an initial appointment is made, the color of the appointment can change based on one of those same options.

- Appointment Type
- Appointment Staff
- Appointment Status

Initial Color

The selection you make from the Initial Color drop down list tells DVMAX what the color of an appointment should be when it is first created. There are 3 possible choices.

Appointment Type – Select Appointment Type if you want the color of a new appointment to be determined by the color associated with the appointment type. The color of an appointment type is selected under Appointment Setup -> Appt Types -> Color (see *Appointment Type Information*).

Appointment Staff - Select Appointment Staff if you want the color of a new appointment to be determined by the color associated with the appointment staff column in which the new appointment is created. The color assigned to an appointment staff is provided under Appointment Setup -> Scheduler Staff -> Color (see *Appointment Staff Information*).

Appointment Status - Select Appointment Status if you want the color of a new appointment to be determined by the color associated with the appointment status assigned when a new appointment is created. The color assigned to an appointment status is provided under Appointment Setup -> Status Values -> Color (see *Status Value Information*).

 Appointment color can always be changed manually when an appointment is created or any time an appointment detail dialog is opened. From the Appointment Detail dialog, simply click the Color drop down menu and select a new color. Manual color selection will override the **Initial** and **Default Color** settings.

Default Color

The selection you make from the Default Color drop down list tells DVMAX what color an appointment should be when changes are made to the appointment. The color of an appointment can change if the appointment type changes, if the staff associated with the appointment changes or if the status of the appointment changes. The **Initial Color** setting determines the color of an appointment when the appointment is first created. The **Default Color** dictates how the color of an appointment should change after that.

Appointment Type – Select Appointment Type if you want the color of an appointment to change if the appointment type is changed after the initial appointment has been created and saved.
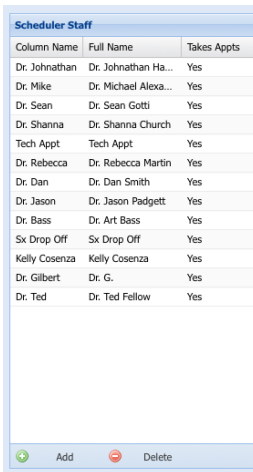
Appointment Staff - Select Appointment Staff if you want the color of an appointment to change if the appointment staff is changed after the initial appointment has been created and saved.

Appointment Status - Select Appointment Status if you want the color of an appointment to change if the appointment status is changed after the initial appointment has been created and saved.

ⓘ Appointment color can always be changed manually any time an appointment detail dialog is opened. From the Appointment Detail dialog, simply click the **Color** drop down menu and select a new color. Manual color selection will override the **Initial** or **Default Color** settings.

Setting Up Appointment Staff

Before you can schedule any appointments, you need to specify at least one staff or resource for which appointments can be made. While some Appointment Staff records are usually added during initial DVMAX installation, you may need to edit existing records or add new appointment staff. Only staff and resources listed in the **Scheduler Staff** area of Appointment **Setup** can be used to schedule appointments.

You can also use the **Scheduler Staff** area to set up a Dr. Weekly and/or a Recurring schedule that applies to a selected staff or resource.

View All Appointment Staff Records

To view the list of all Appointment Staff:

- Select **Appointments** from the **Command Palette**.

- From the **Appointment Scheduler**, select **Setup**.

- From the Setting tab, view a list of all **Scheduler Staff** on the right side of the Setting dialog.

- To add a new Appointment Staff record, refer to *Adding a New Staff Record*.
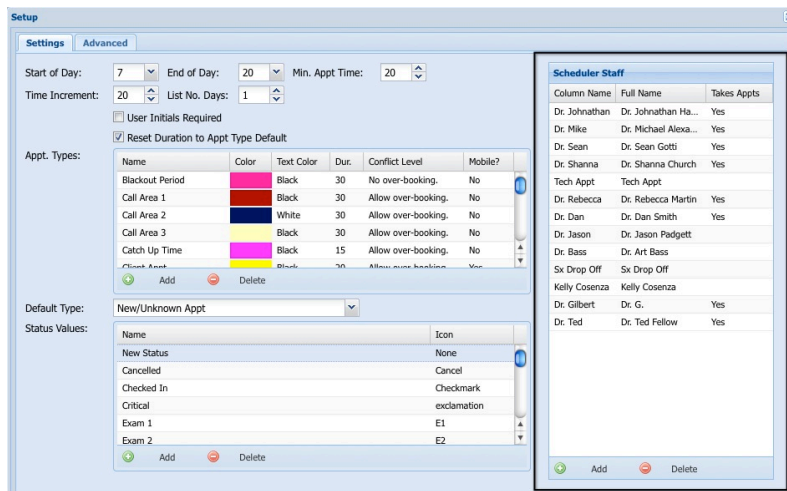
The Appointment Staff List

The Appointment Staff list displays Column Name, Full Name, whether the staff Takes appointments (See *Appointment Staff Information* for more detail). To set or edit the color associated with the Appointment Staff record, double click a Staff record.

Sorting the Appointment Staff List

The list of Appointment Staff records can be sorted by any of the column headings on the list.

To sort the list of Appointment Staff records:

- From the list area, click on the column heading by which you would like to sort the list.

- From the drop down menu, choose to sort the list by the column heading in Ascending or Descending order by selecting **SortAscending** or **Sort Descending** from the menu.

Display or Hide Columns from the Appointment Staff List

The Appointment Staff list displays with a set of default columns. It is possible to hide the display of columns. To display or hide columns from the list:

- From the records list, move your pointer or "mouse over" the heading of a column on the list.

- Note that there is an arrow on the right side of the column heading. Click on the arrow to display the drop down menu.

- Click **Columns** from the menu to see the list of columns that can be displayed or hidden.

- Click on an item to select it and have it appear on the list. An item is selected if there is a checkmark in the box beside the column name.

- To hide a column so that it does not appear on the list, click the associated checkbox to remove the mark from the box. An item is hidden or deselected if there is no checkmark in the box beside the column name.

Opening a Record from the Appointment Staff List

- Double click a selected entry to view or edit the record.

Adding New Appointment Staff

To create a new Appointment Staff record:

- Select **Add** from the **Scheduler Staff** list under Appointment **Setup**.

- A New Appt Staff tabbed window opens.

- Type new appointment staff information in the General Information area. Refer to *Appointment Staff Information* for more details.

- Click **OK** to save the new Scheduler Staff record.

Add or Edit Appointment Staff Information

The following information needs to be added for new appointment staff. You can also use these steps to edit existing records.

- In the **Column Name** field, type a short name. The **Column Name** will also appear on the column header in the Appointment Scheduler.

- In the **Full Name** field, type the full name of the staff person or resource. This is the staff or resource name as it will be listed in the **With** drop down list on the Appointment creation dialog.

- Select **Takes Appointments** to indicate that the staff or resource takes appointments. Click again to clear. Only staff designated as taking appointments can be displayed on the Appointment Scheduler.

- Type a value in the **Sort Order** field. This is a user-defined value used to determine the order in which the columns appear on the Appointment Scheduler. The

Appointment Staff name with the biggest Sort number is listed farthest right in the column order on the Appointment Scheduler. The name with lowest Sort number will appear first on the Appointment Scheduler. If 2 Sort values are the same, the names will appear in alphabetical order from left to right.

- From the **Color** drop down list, select a color to assign to the column header for the appointment staff. This color will display in the column header for that staff member on the Appointment Scheduler. Color will also be used to determine appointment color through the **Initial** and **Default Color** settings where Appt Staff is selected for one or both of those options.

Editing Appointment Staff

To view or edit an existing Scheduler Staff record:

- Double click the record you want to edit from the Scheduler Staff list. This opens an Appt Staff record tabbed window.

- Follow the process described in the section titled *Appointment Staff Information* to edit the basic Scheduler Staff information, or refer to the sections on *Dr. Weekly Schedule*, *Recurring Schedule* and *Regions* for more on creating staff schedules.

Deleting Appointment Staff Records

Appointment Staff records can be deleted, but they may have several associated records that will be affected by the deletion. Alternatives include marking the staff as not taking appointments by clearing the **Takes** field, thereby marking them as inactive.

⚠️ Deleting an Appointment Staff record will **permanently** remove any past or future appointments made under that name. Unless a selected record has never been used, deleting the record is not recommended.

To delete an Appointment Staff record:

- From the Scheduler Staff list, click to select the record you want to delete.

- Click **Delete** from below the Scheduler Staff list.

- A Confirm window opens. Click **OK** again to continue with the deletion of the record, or click **Cancel** to abort the deletion process.
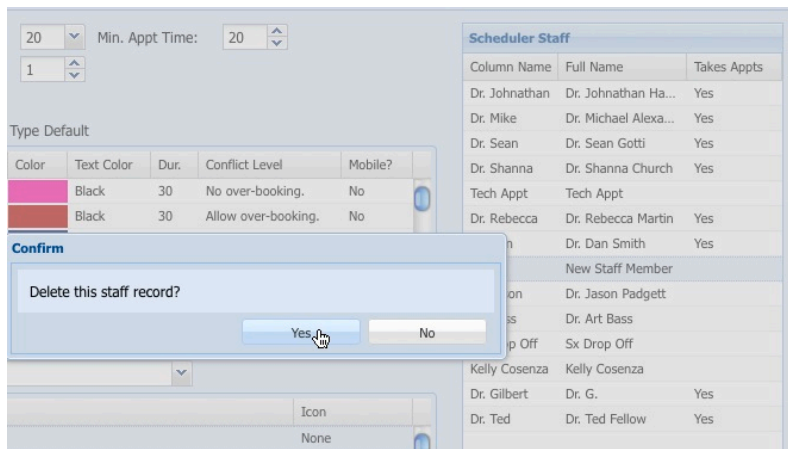
Creating a Dr. Weekly Schedule (Daily Schedule) for Appointment Staff

Formerly called the Daily Schedule, the **Dr. Weekly Schedule** looks like a smaller version of the Appointment Scheduler. While the Appointment Scheduler manages Client and Patient appointments, the **Dr. Weekly Schedule** is like a personal, 7-day calendar for a selected staff or resource. The **Dr. Weekly Schedule** is for staff entries that are not regularly scheduled or are not generally recurring items, such as a special blackout period. Items created in the Dr. Weekly schedule only apply to the current week, Sunday-Saturday. Use the **Recurring Schedule** to set up regularly occurring staff scheduling events and apply the recurring events to a longer period of time.
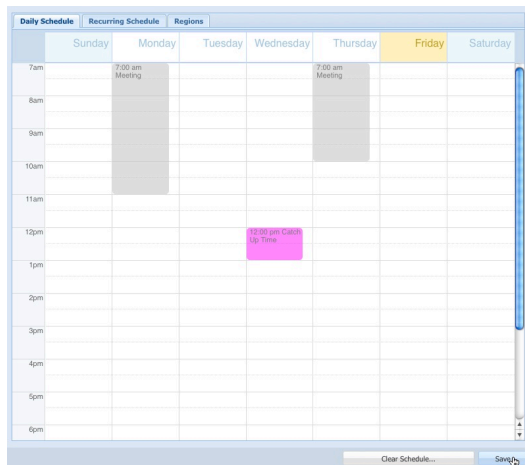
To create or edit the Dr. Weekly Schedule:

- Click the **Dr. Weekly Schedule** tab from the Appt Staff window.

- Drag to create the Schedule event on the day associated with the pending event (see *Creating Appointments* for more on how to create and work with appointments).

- From the **Time** drop down, select the start time if different than the value displayed.

- Type an appointment length in the **For** field (if different than the length displayed).

- Select an **Appointment Type** (scheduled event). Items in this drop-down menu are defined under Appointment Types.

- If desired, select **Staff Scheduling Entry** for this appointment. A Staff Scheduling Entry is not editable from the main Appointment Scheduler. Use this option to make the event non-editable from the main scheduler. You can edit the event from the Dr. Weekly Schedule.

- If desired, you can select **Split into MultipleAppointments**. This is particularly useful if you want to create a large block of the same appointment type. You can select several hours, for example, then divide that block into a series of 20 minute appointments of the same type.

- When you view the regular Appointment Scheduler, this event for that staff or resource will already be blocked on the Scheduler.

- Repeat the process as needed to create the Dr. Weekly schedule.

- Click **Save** from the Dr. Weekly Schedule tab to save the schedule. The events you created will be visible on the main scheduler for the current week. You may need to refresh the Scheduler to see the new events.

For more information on working with appointments, see *Creating and Editing Appointments* for the regular **Appointment Scheduler**. The basic process of creating, moving and editing is the same for the **Dr. Weekly** and **Recurring** as it is for the main **Appointment Scheduler**.

Deleting Dr. Weekly Schedule Appointments

You cannot delete Staff Scheduling Entries added via the Dr. Weekly Schedule from the main Appointment Scheduler. You must be in the **Appointment Staff Dr. Weekly Schedule**.

To delete a Dr. Weekly Schedule Appointment block or blocks:

- From the **Dr. Weekly Schedule** tab of the Appointment Staff record, double click the appointment you want to delete.

- Click **Delete**.

- Type staff initials if requested.

Clearing the Dr. Weekly Schedule

You can clear events added to the *main Appointment Book* from the Dr. Weekly Scheduler using the **Clear Staff Schedule** button.

To clear the Dr. Weekly Schedule:

- From the Dr. Weekly Schedule tab, click **Clear Staff Schedule**.

- Type a date range over which to apply the Clear. This will clear all Staff Scheduling Entries and all non-populated regular appointments from this appointment staff person's schedule for the specified date range. It will also clear those appointments from the Dr. Weekly Schedule tab.

- Click **OK** to continue.

- The Dr. Weekly Schedule for the specified Appointment Staff will be cleared for the selected date range. Those appointments will be removed from the Dr. Weekly schedule and from the main Scheduler.

⚠️ Clicking **Clear Staff Schedule** will only remove **Staff Scheduling Entries** and all non-populated regular appointments from this appointment staff person's schedule for the specified date range. Appointments associated with a client or patient, or appointments to which notes have been added and saved, will never be removed from the main scheduler unless you delete individual appointments manually.

Creating and Editing a Recurring Schedule for Appointment Staff

The process of creating and editing a Recurring Schedule is effectively the same as that for the Dr. Weekly Schedule. The Recurring Schedule is designed to reflect recurring staff scheduling entries over a generic one-week period and is useful for events that occur at regular time and day intervals over a period of weeks or months, such as lunch breaks. The Recurring Schedule may also be used to block off times when a particular staff or resource is never available for appointments or is only available for certain types of appointments.

⚠️ Remember that the Recurring Schedule must be applied to a specified date range before you click **OK** or the schedule will not become effective. The Recurring Schedule will display on the main Appointment Scheduler for the selected staff for the duration of the range.

To create or edit a Recurring Schedule:

- From Appointment Scheduler Setup, select the Scheduler Staff for whom you wish to create a Recurring Schedule.

- Click the **Recurring Schedule** tab from the **Appt Staff** window.

- Drag to create the Schedule event on the day associated with the pending event (see *Creating Appointments* for more on how to create and work with appointments).

- From the **Time** drop down, select the start time if different than the value displayed.

- Type an appointment length in the **For** field (if different than the length displayed).

- Select an **Appointment Type** (scheduled event). Items in this drop-down menu are defined under Appointment Types.

- If desired, select **Staff Scheduling Entry** for this appointment. A Staff Scheduling Entry is not editable from the main Appointment Scheduler.

- If desired, you can select **Split into MultipleAppointments**. This is particularly useful if you want to create a large block of the same appointment type. You can select several hours, for example, then divide that block into a series of 20-minute appointments of the same type.

- When you view the regular Appointment Scheduler, this event for that staff or resource will already be blocked on the Scheduler. These blocks will be editable from the main Scheduler, provided they are not Staff Scheduling Entries.

- Repeat the process as needed to create the recurring schedule.

- Click **Apply to Date Range** and type a Start Date and End Date for the range over which you want to apply the schedule.
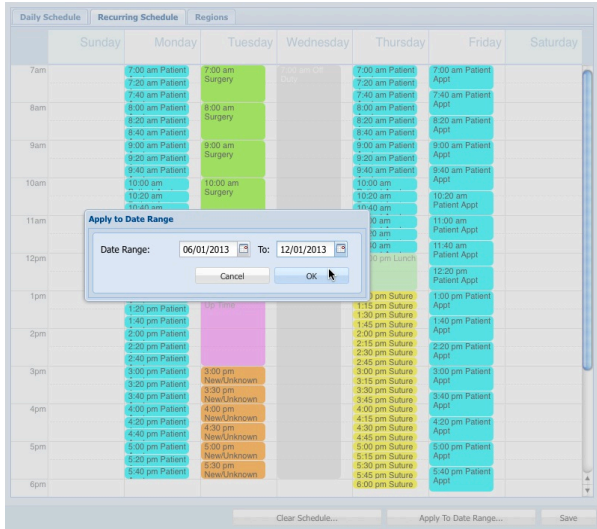
- A notification window will open in the top right corner of your browser window indicating that events are being created.
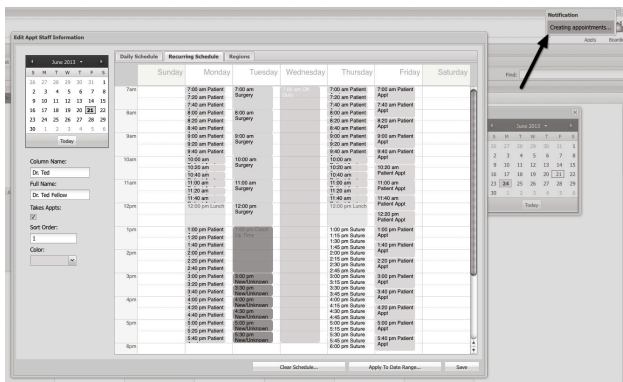
- When the appointments or events have been created on the main Schedule, you will see a pop up alert that says "Apply Completed". Click **OK** to close the Alert.
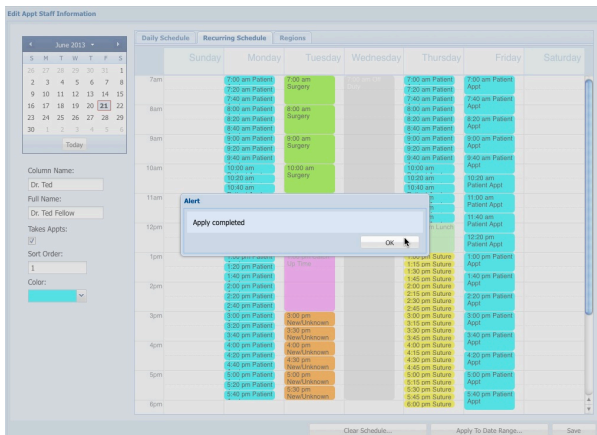
- Click **Save** from the Recurring Schedule tab to close the Recurring Schedule tab and return to the Setup dialog.

⚠️ Remember you must click **Apply to Date Range** and specify a start date and end date or the recurring schedule will not be applied.

ℹ️ For more information on working with appointments, see *Creating and Editing Appointments for the regular Appointment Scheduler*. The basic process of creating, moving and editing is the same for the Dr. Weekly and Recurring as it is for the Appointment Scheduler.

Deleting Recurring Schedule Events

You cannot delete some types of appointments made using the Recurring Schedule from the main Appointment Scheduler. If you try, you will get a message reminding you that staff scheduling entries cannot be modified on the Appointment Scheduler.

ℹ️ To remove or edit individual Staff Scheduling Entries that appear on the main Appointment Scheduler, you must be in the Appointment Staff **Dr. Weekly Schedule** Setup tab. From the Recurring Schedule you can only clear the full schedule over a specified date range (See *Clearing the Recurring Schedule*) or modify the Recurring Schedule template.

Clearing the Recurring Schedule

You can clear events added to the *main Appointment Book* from the Dr. Weekly Scheduler and Recurring Schedule using the **Clear Staff Schedule** button

To clear Recurring Schedule events from the main appointment Scheduler:

- From the **Recurring Schedule** tab, click **Clear Staff Schedule**.

- Type a date range over which to apply the Clear. This will clear all Staff Scheduling Entries and all non-populated regular appointments from the main appointment scheduler for this appointment staff for the specified date range.

- To edit or modify the Recurring schedule template itself, you must individually edit or delete the events on the Recurring schedule.

- Click **OK** to continue.

⚠️ Clicking **Clear Staff Schedule** from the **Recurring Schedule** tab will only remove **Staff Scheduling Entries** and all non-populated regular appointments from the main Appointment Scheduler for this staff person for the specified date range. Appointments associated with a client or patient, or appointments to which notes have been added and saved, will never be removed from the main scheduler unless you delete individual appointments manually on the main scheduler.

⚠️ When **Clear** is used on the **Recurring Schedule**, associated items in the specified date range are cleared *from the Main Scheduleronly*. The events on the **Recurring Schedule** tab itself remain in tact (are not cleared). To change the Recurring Schedule itself, you must manually move, edit or delete individual items on the Recurring Schedule tab.

⚠ The existing items on the Main Scheduler are not removed when you apply a new Recurring Schedule, so events may overlap. If you want to replace one recurring schedule with a new one, clear the old one first by manually deleting the events you want to remove. Then, edit the Recurring Schedule template as needed, and Apply.

Regions Scheduler

The **Regions** scheduler lets you visually block out sections of the Day View schedule over a generic one-week period. You can color segments or full columns if you choose. Regions are background colored blocks on the scheduler, where the color corresponds with the default color of the selected appointment type. There is no possible user interaction with these blocks. They are simply a background visual cue for users as to the type of appointment that should be booked in the blocked space. When you create and save a Regions schedule for a staff or resource, the opaque "schedule" appears as a watermark or background on the staff column. Actual appointments can easily be created over these colored "regions".

To create or edit Regions:

- From Appointment Scheduler Setup, select the Scheduler Staff for whom you wish to create a Region Schedule.

- Click the **Regions** tab from the **Appt Staff** window.

- Drag to create a region on a day or part of the day.

- From the **Create Region** pop up menu, select the type of appointment you want to assign to this region. This will provide a visual cue for those using the scheduler that on that day of the week, over the specified time period, scheduling appointments of the specified type is preferred. For example, if you create a Patient Appointment region from 7AM-4PM on Monday, this will display on the Main Scheduler as an opaque block on Mondays, reminding users that time is primarily for scheduling patient appointments.
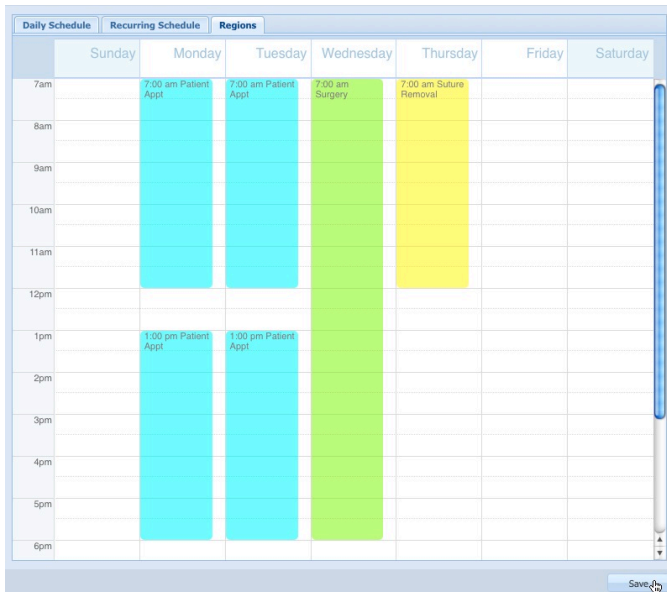
- Click **Save** to create the Regions schedule for the selected staff.

- The schedule is applied indefinitely. You can edit or remove the regions at any time by going to the **Regions** tab and double clicking the block you want to edit or remove. Choose a different appointment type from the drop down menu, or click **Delete** to remove the region.

Advanced Appointment Settings

From the **Advanced** tab under Appointment **Setup**, you can define the appointment labels, also called templates, for appointments in Day view and Month view, as well as defining what you would like to display with the **ToolTip** bubble that appears when hovering over appointments.
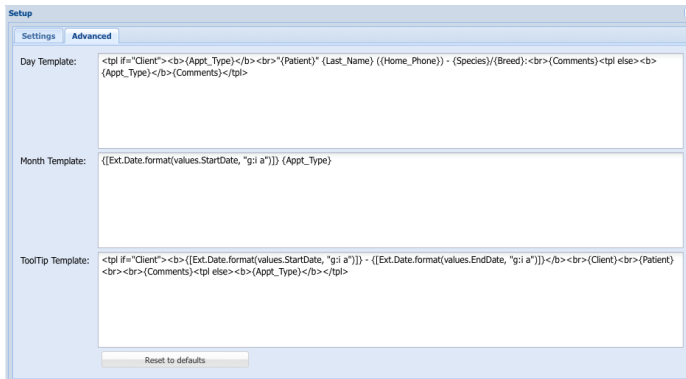
Day Template

The Day template defines the label that displays on appointments under Day view on the Scheduler.
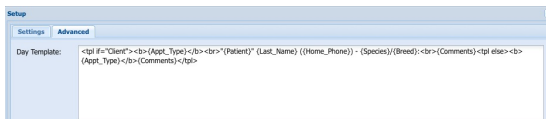
⚠ It is strongly recommended that you seek the advice of DVMAX Technical Support before making any changes to the templates.

Month Template

The Month template defines the label that displays on appointments under Month view on the Scheduler.

The default template is {[Ext.Date.format(values.StartDate, "g:i a")]} {Appt_Type}, which will display the date and time

⚠ It is strongly recommended that you seek the advice of DVMAX Technical Support before making any changes to the templates.

ToolTip Template

The ToolTip appears when hovering over appointments. The content of the ToolTip is managed from **Advanced** tab of Appointment **Setup**. You can turn the ToolTip behavior on or off from

Preferences on the Appointment Scheduler.
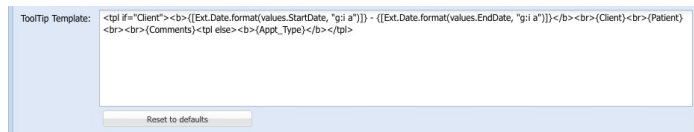
ToolTip Template: `<tpl if="Client"><b>({[Ext.Date.format(values.StartDate, "g:i a")]} - {[Ext.Date.format(values.EndDate, "g:i a")]})</b><br>{Client}<br>{Patient} <br><br>{Comments}<tpl else><b>{Appt_Type}</b></tpl>`

Reset to defaults

⚠️ It is strongly recommended that you seek the advice of DVMAX Technical Support before making any changes to the templates.

Defining Appointment Labels and ToolTip Templates

⚠️ It is strongly recommended that you seek the advice of DVMAX Technical Support before making any changes to the templates.

There are default values provided for appointment labels (Day and Month) and the ToolTips bubble when DVMAX is installed. However, the information displayed is very flexible and can be configured to reflect values most useful to your clinic staff by using templates.

General Guidelines for Creating Templates

1. Most templates will start with <tpl> and end with </tpl> (These are called tags). Inside these tags are placeholders for appointment information. Placeholders are inside brackets {…}.

The simplest template possible is something like this:

<tpl>{Client}</tpl>

This will simply display the client name.

2. Templates can also use conditionals (i.e. "if" and "else") like this:

<tpl if="Client">{Client}<tpl else>{Appt_Type}</tpl>

This says if there is a client name (if="Client") then put it on the label. If there is no client name ("else"), then just display the appointment type.

3. Templates can also include simple formatting codes, like bold, and italic:

<tpl if="Client">{Client}<tpl else><i>{Appt_Type}</i></tpl>

This will display the client name in bold, or the appointment type in italic.

4. You can also include date and time in the template. When editing date and time values, only edit the values between the quotation marks. Do not edit or manipulate brackets or commas or other punctuation.

{[Ext.Date.format(values.StartDate, "g:i a")]}

This says the time will display using a 12-hour clock, including minutes and the time will be followed by "am" or "pm" in lowercase.

If you see the following (as contained in the default ToolTip template):

{[Ext.Date.format(values.StartDate, "g:i a")]} - {[Ext.Date.format(values.EndDate, "g:i a")]}

This represents a range of time, such as with the beginning (StartDate) and end (EndDate) of an appointment block.

Review the values under *Date and Time Formatting for Templates* for date and time formatting options.

⚠ Contact DVMAX Technical Support if you require assistance in setting up the Day, Month and ToolTip templates to make sure everything works correctly.

Possible Fields for Inclusion in Templates

The following is a selection of possible fields to include in your templates. Keep in mind that space is very limited, as this is just a small label for an appointment or tooltip.

{Appt_Type} – Use to include appointment type in the template.

{Appt_Status} – Use to include appointment status in the template.

{Breed} - Use to include breed in the template.

{Business_Phone} - Use to include business phone in the template.

{City} - Use to include city in the template.

{Client_Alert} - Use to include client alert in the template.

{Client} - Use to include Client name in the template.

{Deceased} - Use to include deceased status in the template.

{DOB} - Use to include patient DOB in the template.

{Email} - Use to include client email in the template.

{Gender} – Use to include patient gender in the template.

{Home_Phone} - Use to include home phone in the template.

{Patient_Alert} - Use to include patient alert in the template.

{Patient} - Use to include patient name in the template.

{Species} - Use to include species in the template.

{Staff_Name} – Use to include the appointment staff/resource name in the template.

{Visit_Reason} - Use to include visit reason in the template.

{Weight} - Use to include patient weight in the template.

{Zip} - Use to include client zip code in the template.

Date and Time Formatting for Templates

Below is a list of Date- and Time-related formatting values that may be used in templates. Included for each value is the format, description and examples.

d - Day of the month, 2 digits with leading zeros 01 to 31
D - A short textual representation of the day of the week Mon to Sun
j - Day of the month without leading zeros 1 to 31
l - A full textual representation of the day of the week Sunday to Saturday
m - Numeric representation of a month, with leading zeros 01 to 12
M - A short textual representation of a month Jan to Dec
n - Numeric representation of a month, without leading zeros 1 to 12
a - Lowercase Ante meridiem and Post meridiem am or pm
A - Uppercase Ante meridiem and Post meridiem AM or PM
g - 12-hour format of an hour without leading zeros 1 to 12
G - 24-hour format of an hour without leading zeros 0 to 23
h - 12-hour format of an hour with leading zeros 01 to 12
H - 24-hour format of an hour with leading zeros 00 to 23
i - Minutes, with leading zeros 00 to 59
s - Seconds, with leading zeros 00 to 59

⚠ When editing date and time values, only edit the values between the quotation marks. Do not edit or manipulate brackets or commas or text other than that inside the commas. For example, notice "g:i a" in the following template could be edited, but you should not change the rest:

{[Ext.Date.format(values.StartDate, "g:i a")]}

⚠ Contact DVMAX Technical Support if you require assistance in setting up the Day, Month and ToolTip templates to make sure everything works correctly

The Appointment Scheduler: An Overview

Before you can take full advantage of the flexibility of the **Appointment Scheduler**, you should become familiar with the many features it contains. The Appointment Scheduler is a tabbed window divided into 6 panels for working with appointments: **Day View**, **Week View**, **Month View**, **Combined View**, **List View** and **Heat Map**. There is a toolbar at the top of the Scheduler that includes appointment **Preferences** and **Print** buttons, a **ShowDate Picker** button, a **Date** field with calendar and a **Find** field. There is a **Setup** button at the top of the Scheduler.

- The **Setup** button is positioned in the upper left corner of the Appointment Book and opens the Setup user interface for the Appointment Scheduler.
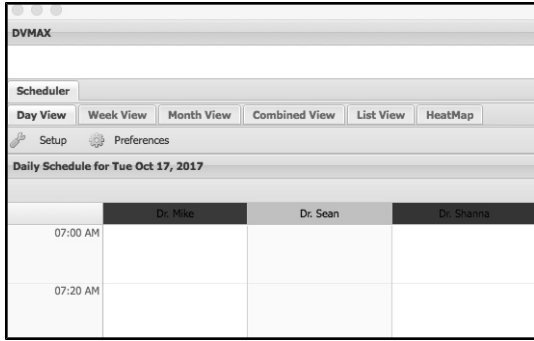
- The **Print** button is positioned in the lower left when working with a scheduler open in an internal browser (default) or in the upper left corner of the Appointment Book if the scheduler is open in an external browser. Clicking **Print** will print appointments by selected staff for the date range specified.
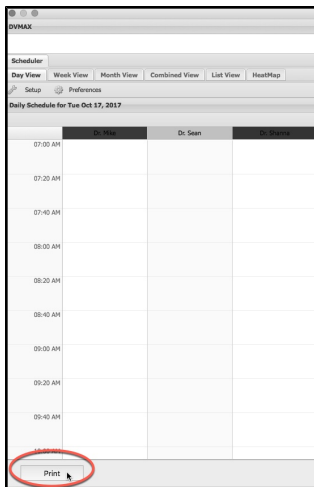
- The **Date Picker** button opens a floating calendar that can be repositioned.

- The **Date** field is positioned in the upper right of the Appointment Book.

- The **Find** field is positioned in the upper right corner of the Appointment Book. Confirm that typing in the Find field provides a list of client and patient appointments that begin with the text you type.

Scheduler Views

The Scheduler can be displayed in 6 different views. You can move between views by clicking the tab of the view you wish to see. For information on working with those views, see the relevant section in the *Appointments* chapter.

Day View – The Day view on the main appointment grid is the place where scheduled appointments for the selected day are displayed. Appointments appear as colored blocks on the grid. What label appears on the appointment block is defined under Setup -> Advanced tab -> Day Template. The ToolTip bubble that displays when you hover the pointer (mouse over) an appointment in Day View is defined under Setup ->Advanced -> ToolTip template. You can create and edit appointments from Day View.
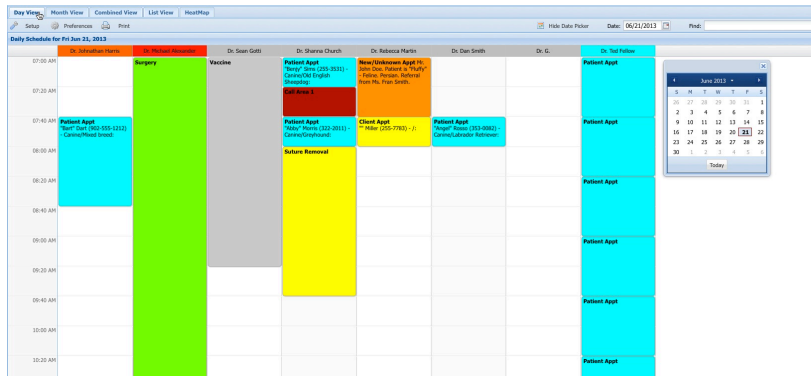
Week View – The Week View displays appointments in a 1-week (Sunday – Saturday) calendar. By default, the current week displays, showing appointments for the first staff or resource on the Appointment Staff List (determined by Staff Sort Order in Setup). There is a Staff filter on the Week View. You can create and edit appointments for any appointment staff in Week View.

Month View – The Month View displays appointments in a one-month calendar. Appointments on the Month View are filtered by **Appointment Type** and Appointment **Staff**. Filters are located in the top right of the appointment grid area. The default view is to show the default appointment type (as defined under Setup) for the first listed Appointment Staff person (determined by Staff Sort Order in Setup). You can create and edit appointments in Month View.
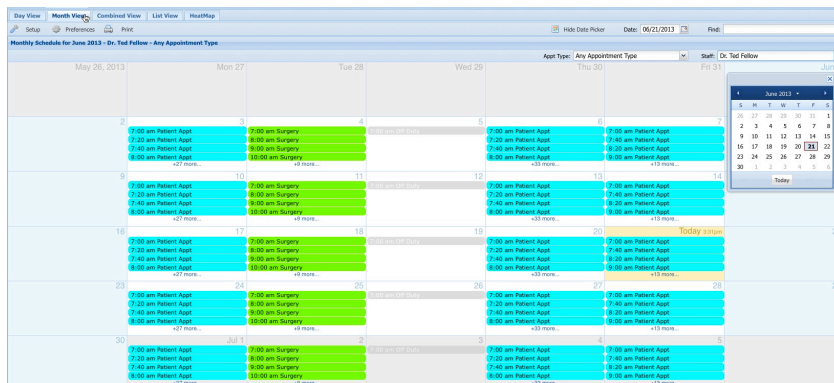
Combined View – The Combined View is a combination of Month and Day Views, with the top portion of the window showing Month View and lower half of the window showing Day View. You can create and edit appointments in Combined View.
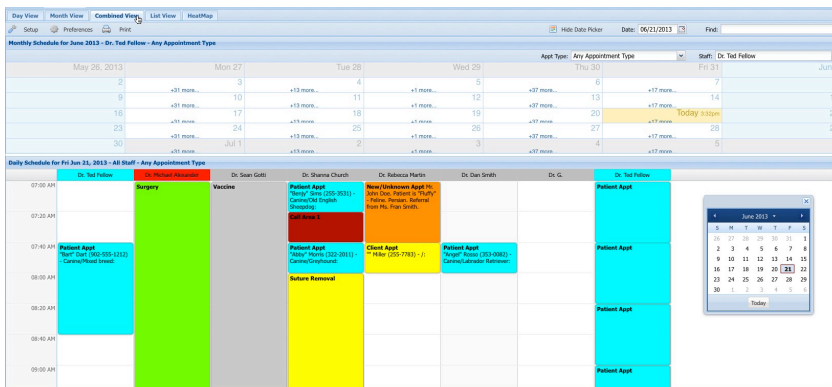
List View – The List View displays a list of appointments by date. The default view is to show appointments over a 1-day period. You cannot create appointments in List View, but you can edit existing appointments.

Heat Map – The Heat Map view displays a one month visual overview of productivity, showing the percentage of time booked for client- and patient-associated appointments per day in relation to the total hours for which the clinic is open daily (as defined under Scheduler Setup). You cannot create or edit appointments from this view. Clicking on a day in the Heat Map takes you to the selected date in Day View.
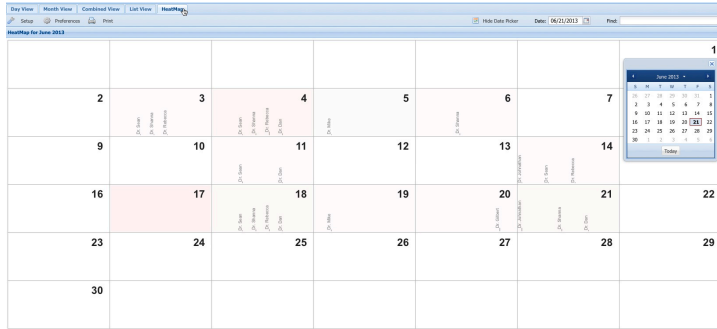
Optimizing Scheduler Performance

Scheduler speed and performance will be affected by the number of columns, resources (staff) and/or events (appointments) displayed on any given Scheduler view. You may wish to consider constraining the number of columns or resources (staff) in a particular view, such as showing fewer columns in Day View or fewer staff in week view, to optimize performance. Since Scheduler configuration is a preference set per workstation, not everyone at every workstation may need to see every column/event or resource all the time. As well, for optimum performance, users should refer to DVMAX hardware and operating system requirements documents found at https://dvmaxk-b.atlassian.net/wiki/spaces/DP/pages/1179675/System+Requirements+Certification+Matrix. Contact DVMAX Technical Support with any questions about system requirements or proper setup for the Appointment Scheduler.

Appointment Preferences

Appointment **Preferences** give you control over the column width and row height of the Scheduler grid ad well as whether the ToolTip feature is enabled. The ToolTip is an information bubble that displays when you hover or "mouse over" an appointment. The content of the **ToolTip** message is defined under **Setup** (see *ToolTips* under *Advanced Appointment Settings*).
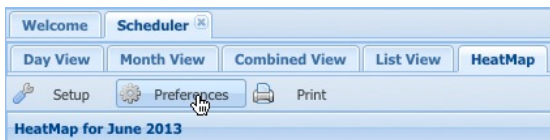
Show ToolTips

Select **Show ToolTips** to display the ToolTip message when you hover over an appointment. To adjust the content of the ToolTip message, see *ToolTip Template* under *Advanced Appointment Settings*.
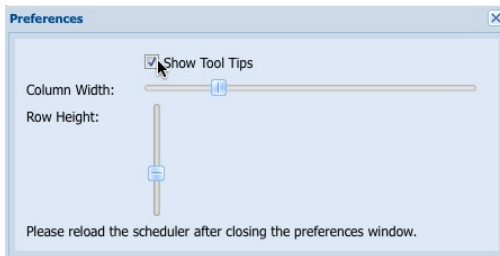
Automatic Column Widths

Select Automatic Column Widths to automatically resize column width based on the size of the appointment scheduler window. DVMAX will update column width to fit the size of the scheduler window. When this option is not selected, you can manually adjust column width the Column Width slider, also located under Scheduler **Preferences**.
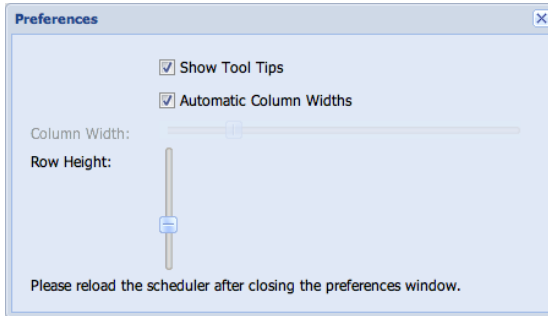
Adjust the Column Width on the Appointment Scheduler

Column width and row height of the Scheduler display are set from **Preferences** on the **Appointment Scheduler**. To adjust column width of the Appointment grid, move the horizontal **Column Width** slider to the left for narrower columns or to the right for wider columns. To have column widths automatically adjust as you resize the appointment window, select **Automatic Column Widths**, also located under Scheduler Preferences.
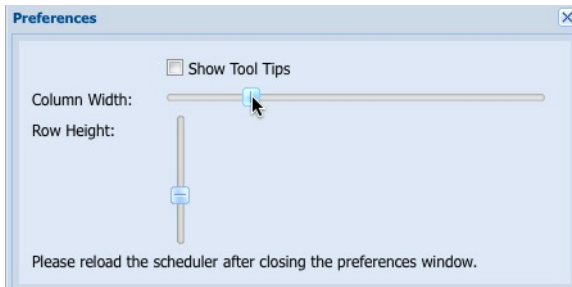
Adjust the Row Height on the Appointment Scheduler

Column width and row height of the Scheduler display are set from **Preferences** on the **Appointment Scheduler**. To adjust row height of the Appointment grid, move the vertical **Row Height** slider up for taller rows or down for shorter rows.

Show Date Picker (Calendar)

The Date Picker is a floating calendar you can position anywhere inside the Appointment Scheduler window. Clicking the **ShowDate Picker** button opens the floating calendar. The **Date Picker** remains open until it is closed.
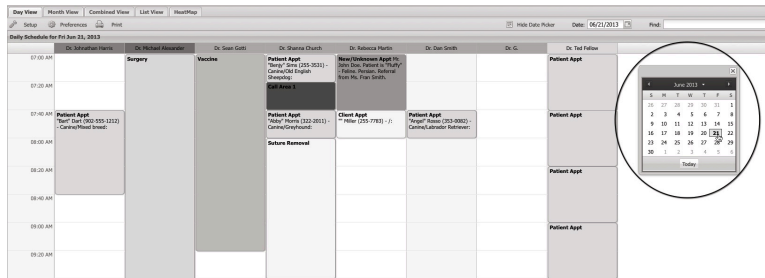
Selecting a date from the Date Picker opens that date on the Day View, Combined View or List View and changes the date in the Date field to the selected date. Use the Date Picker like the Calendar to select a day or month in which to view or create appointments. See *Using the Calendar* for more details on how to use the Date Picker.
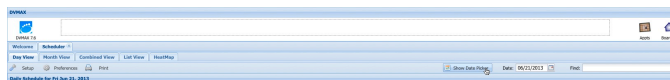
ⓘ The Date Picker will remain open until it is closed. Even if you close the browser, if you did not close the Date Picker, it will be open in the same location you last placed it when you reopen the browser. Please note that you cannot move the Date Picker off the screen.

Appointment Scheduler Date Field

The **Date** field is positioned in the upper right of the Appointment Book. Type a date in the field or use the Calendar to select the day and month for which you wish to make or view appointments on the Appointment Book. See *Using the Calendar* for more details on how to use the calendar in the Date field.
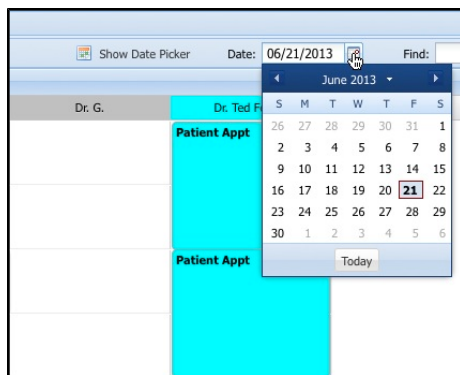
Using the Calendar

Use the **Calendar** from the **Date Picker** or **Date** field to select the day and month for which you wish to make or view appointment on the **Appointment Scheduler.**

Any appointments showing will be for the day and month selected on the Calendar, and any new appointments you create will be for that day. By default, the **Appointment Scheduler** shows the current month and day. You can move forward or back in the Calendar by clicking the appropriate area.

Choosing a Day from the Calendar

The Calendar shows all of the days in the selected month. The default is to display the dates for the current month. The current date is indicated on the Calendar with a red square around the day.

To choose a day from the Calendar:

- Click on a date on the Calendar. The date you select will be highlighted.
- The Appointment view will adjust to reflect appointments, if any, for the chosen day (in Day View) or month (in Month View).
- Click the **Today** button from the Calendar to quickly return to the current date.

Selecting a Month from the Calendar

By default, the Calendar shows the days for the current month in Month View. The top of the Calendar shows the name of the month, with arrows on the left and right side of the name.

To make or view appointments in a different month:

- Click the left or right arrow on either side of the name of the month to scroll forward or back in the Calendar year.
- As you click an arrow, the month displayed in Month View will change.
- Click the **Today** button from the Calendar to quickly return to the current date.

Searching for Appointments Using the Find Option

You can use the **Find** option to find appointments from any view. The **Find** field is positioned in the upper right corner of the Appointment Book. Typing in the Find field provides a list of client and patient appointments that begin with the text you type.

To use **Find** to locate appointments:

- From the **Find** field, type the first few letters of the patient name or client name (first or last name). If you prefer, type the full name to filter the list further. A drop down list will display with all client and patient appointments matching what you type. Click the drop down arrow to the right of the Find field to display the list if it is not visible.
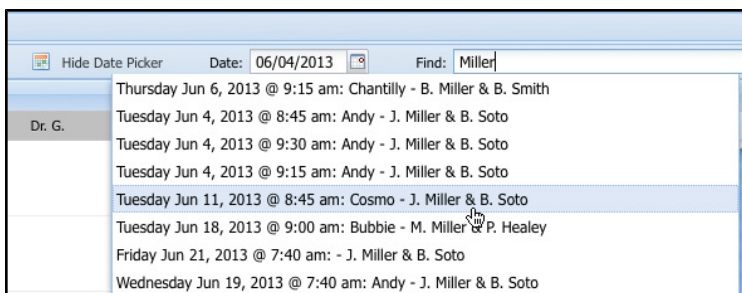
You must type at least 4 characters in the Find field before DVMAX will search. The <Space> bar can be used as a "blank" character. For example, if you were looking for an appointment for a client whose last name contains "Mill", you could either type "Mill" or type "Mil" and press the <Space> bar.

ⓘ If you want to find an appointment for a client with the last name Miller and patient Andy, you could type Miller then press the <Space> bar then type Andy. Alternatively, you could simply type "Mi", press the <Space> bar then type "An". The list of appointments will be filtered by all records containing Mi + An.

- Click to select an appointment from the drop down list. The Appointment Detail dialog for the appointment will open. View or edit appointment details as needed and close the appointment (using **Save**, **Check-In** or **Cancel**, as desired).

- If there are no appointments for a client or patient name matching the text you type, the Find field will display the message, "No Appointments Found".
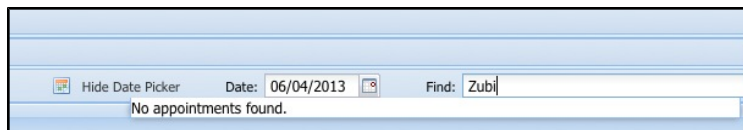
- To find the next appointment for the same client or patient, right click (or Ctrl + click) on the appointment block and select **Find Next Appointment** from the pop up menu. You will move to the next scheduled appointment on the calendar for that patient or client. Where there is no other appointment for the patient or client, a dialog displays stating "Cannot locate future appointment for this patient/client".

Reload the Scheduler (Internal Scheduler Only)

The Reload button at the bottom of the Scheduler is available when the scheduler is open in an internal browser window. This allows you to reload or refresh the scheduler window if needed.

About Day View

Day View is the default view for the Appointment Scheduler. If you are looking at a different Scheduler view, click the **Day View** tab to move to Day View. You can create, edit and delete in Day View. See *Working with Appointments in Day View*, for more on the appointment options in this view.
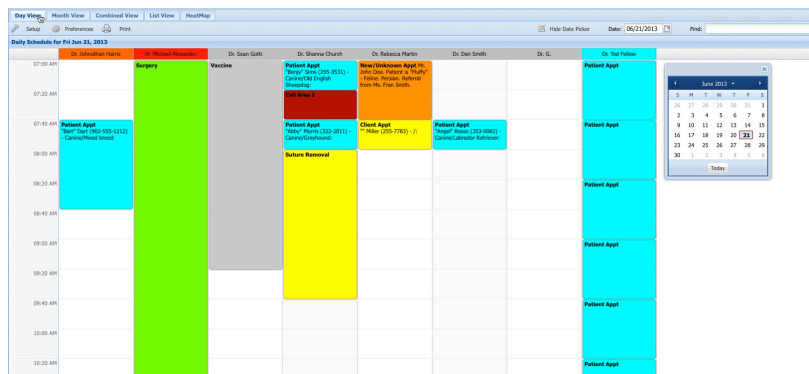
The Appointment grid is the place where scheduled appointments are displayed. In Day View, appointments appear as colored blocks on the grid. The appointment color is configured under Setup.

The content of the appointment label in Day View is defined under Setup. However, space is limited and if you choose to narrow the rows and/or columns (set under Preferences), this may also restrict what you see on the appointment label.

By default, Day View opens to the current day with a column for all defined appointment staff or resources. Between the scheduler toolbar at the top of the page (with the **Setup**, **Preferences** and **Print** buttons) and the column headings/titles for the grid, the date being viewed is shown in the format "Daily Schedule for <Day of Week, Month Day of month, Year>.

Rows and Columns on the Day View Grid

In Day View, rows represent time. The rows are divided into blocks based on the value specified under **Setup** -> **Time Increment**. The first row represents the time specified in the **Start of Day** field under **Setup**. The last time on the grid is one time interval before the time specified in the **End of Day** field under **Setup**.
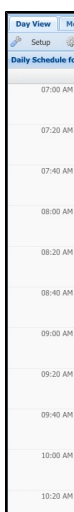
Columns represent appointment staff defined under **Setup** as taking appointments. If there are more columns than can fit on the screen at one time, the scroll bar at the bottom of the Appointment grid will allow you to view the rest of the daily schedule. It is possible to quickly show/hide columns by selecting or deselecting staff/resource from the Staff drop down menu.
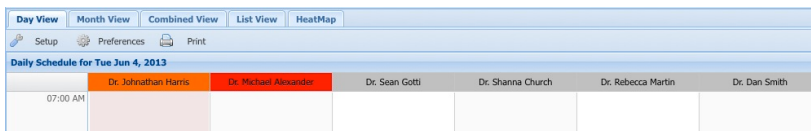
Using the Appointment Staff Filter in Day View

In Day View, appointments are sorted into columns representing appointment staff or resources. You can adjust what columns are displayed using the Staff drop down menu. The Staff drop down menu is located in the top right of the appointment grid area. The default view is to show appointments for all defined Appointment Staff. The order of the columns is determined by the **Staff Sort Order** field in **AppointmentSetup**.

To show/hide columns for specified one or more staff or resource:

- From Day View, select the **Staff** drop down menu.

- All staff/resources are selected by default. A selected staff/resource is high-lighted with a blue background.

- From the **Staff** drop down menu, click to deselect a staff or resource. Deselected staff/resources appear with a white background. Click again to select.

- The Day View panel will need to be refreshed to see the changes. Click on another tab, such as Week View or Month View, then return to Day View.

- Changes made to displayed columns in Day View will remain while the scheduler session is open. When you close the scheduler and reopen it, the Day View will return to default display and all staff/resource columns will be present.

Display or Hide Appointment Staff Columns in Day View

By default, all appointment staff or resources designated as taking appointments (under Scheduler Setup) are displayed in Day View. To display or hide columns from the list:

- From the Staff drop down list on the right side of the Day View window, click to select the staff you want to display.

- Click again to deselect. You may need to reload the screen to see the changes.

Moving Within the Appointment Grid in Day View

- To move up and down within the grid in Day View, use the scroll bar on the right side of the grid, or use the scroll wheel on your mouse (if applicable).

- To navigate left and right, use the scroll bar at the bottom of the grid, or use the left and right arrow keys. The scroll bar on the bottom will only be enabled if there are columns that do not fit on the screen with the view and settings you have selected.

Adjusting the Appointment Scheduler Column Width

See *Automatic Column Width*, *Adjusting Row Height* and *Adjusting Column Width* under *Appointment Preferences*.

Scrolling Left and Right in the Appointment Scheduler

If there are more columns than can fit on the screen at one time, the scroll bar at the bottom of the Appointment grid will allow you to view the rest of the daily or weekly schedule.

ⓘ If you find the Scheduler has performance problems while scrolling using Firefox as your browser (if scrolling is very slow), try turning off **Use Smooth Scrolling** from **Preferences** -> **Advanced** tab.

Appointment Labels in Day View

Appointment labels are highly customizable and are configured under Setup. See *Advanced Appointment Settings* for configuring appointment label templates for Day View and Month View.

The ToolTip Display in Day View

When moving the pointer around on the grid in Day View, the pointer is a clock showing potential appointment start times that correspond to the **Time Increment** value defined under **Setup**. For example, if the **Time Increment** is 20 minutes, there will be 3 possible appointment times in a 1 hour block – at :00, :20, and :40 on the hour.

A **ToolTip** information bubble will display when hovering over an appointment block. The contents of the ToolTip match what is defined under **Setup** -> **Advanced** tab -> **ToolTip Template**.

About Week View

Week View is the second tab or panel on the Appointment Scheduler. Click the **Week View** tab to open this view. The Week View grid displays appointments by staff over a 1-week (Sunday – Saturday) calendar. By default, the current week displays, showing appointments for the first staff or resource on the Appointment Staff List (determined by Staff Sort Order in Setup). If there are no appointments for a given week for a selected staff person, the Week View calendar will be empty. Use the **Staff** drop down menu to select the scheduler for one or more staff.

⚠ While it is possible to select multiple staff in Week View, be aware that speed and performance of the Scheduler will be affected by the number of events displayed.

Appointment Labels in Week View

The content of the appointment label in Week View is the same as under Day View and is defined under Setup. However, space is limited and if you choose to view appointments for multiple staff simultaneously, this will restrict what you see on the appointment label.

Using the Appointment Staff Filter in Week View

Appointments in Week View are filtered by Appointment **Staff**. The **Staff** drop down menu is located in the top right of the appointment grid area. The default view is to show appointments for the first resource in the Appointment Staff list, as determined by **Staff Sort Order** in **Setup**.

To see appointments for a specific staff or resource:

- From Week View, select the **Staff** drop down menu.

- From the **Staff** drop down menu, select the staff or resource for whom to display appointments. You can select more than one staff or resource, but this will affect the ability to display appointment labels.

About Month View

Month View is the third tab or panel on the Appointment Scheduler. Click the **Month View** tab to open this view. The Month View grid displays appointments **by appointment type** and **appointment staff** for a single calendar month. Appointments appear in a list format on each day on the grid. If there are no appointments for a given day for the selected staff person, the date on the calendar will be blank.
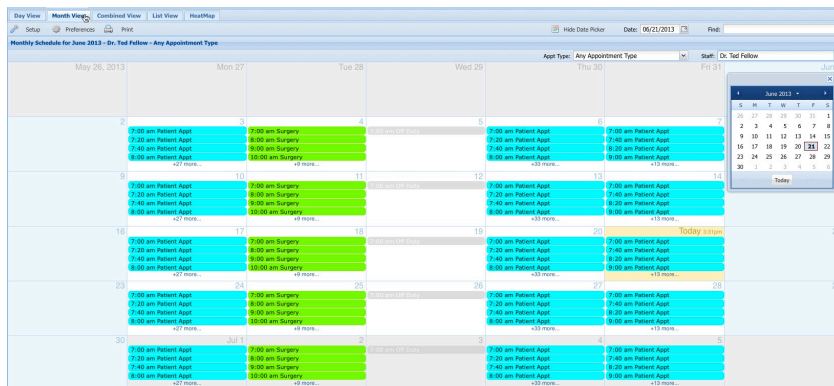
Appointments in **Month View** are displayed by Appointment Type and Staff or Resource. You cannot display all appointments for all staff/resources on Month View. You may only view one staff or resource's Monthly schedule at a time. To view all appointments for all staff over a date range, use **List View**.

If the number of appointments for a day exceeds what will fit on a day block on the grid, there will be text at the bottom of the day block indicating the number of additional appointments not displayed. You can click the **"+ more…"** message to display a full list of the specified appointment type for that day for the staff member.

By default, Month View opens to the current month. Between the scheduler toolbar at the top of the page (with the **Setup**, **Preferences** and **Print** buttons) and the calendar grid, the date being viewed is shown in the format "Monthly Schedule for <Month,Year> - Appointment Staff - Appointment Type".

Appointment Labels in Month View

The content of the appointment label in Month View is defined under **Setup**. See *Advanced Appointment Settings* for configuring appointment label templates for Month View. When you hover over an appointment, a ToolTip bubble will display. Content of the ToolTip is also configured under **Advanced Appointment Settings**.

Using the Appointment Type Filter in Month View

Appointments in **Month View** are filtered by **Appointment Type** and **Staff**. Filters are located in the top right of the appointment grid area. The default view selects the default appointment type (as defined under **Setup**) for the first listed Staff person (determined by Staff Sort Order in **Setup**).

To filter appointments for the selected staff by appointment type:

- From Month View, select the **Appt Type** drop down menu.

- From the **Appt Type** drop down menu, select the type of appointment to display on the calendar. You can select an individual appointment type, or select **AnyAppointment Type** to display all appointments within the month for the selected staff or resource.

- From the **Staff** drop down menu, select the staff or resource for whom to display appointments. You can only display the monthly schedule for one staff or resource at a time. To view appointments for all staff or resources over a time period, use **List View**.

- Appointments will be displayed in a list format on each day of the grid. If the number of appointments for a day exceeds what will fit on a day block on the grid, there will be text at the bottom of the day block indicating the number of additional appointments not displayed. You can click the **"+ more…"** message to display a full list of the specified appointment type for that day for the staff member.

- If a date on the calendar is blank, there are no appointments of the selected type for the chosen staff or resource.

Using the Appointment Staff Filter in Month View

Appointments in Month View are filtered by **Appointment Type** and Appointment **Staff**. Filters are located in the top right of the appointment grid area. The default view is to show default appointment type (as defined under **Setup**) for the first listed Staff person (determined by **Staff Sort Order** in **Setup**).

To see appointments for a specific staff or resource:

- From Month View, select the **Staff** drop down menu.

- From the **Staff** drop down menu, select the staff or resource for whom to display appointments. You can only display one staff or resource at a time.

- From the **Appt Type** drop down menu, select the type of appointment to display on the calendar. You can select an individual appointment type, or select **AnyAppointment Type** to display all appointments within the month for the selected staff or resource.

- Appointments will be displayed in a list format on each day of the grid. If the number of appointments for a day exceeds what will fit on a day block on the grid, there will be text at the bottom of the day block indicating the number of additional appointments not displayed. You can click the **"+ more…"** message to display a full list of the specified appointment type for that day for the staff member.

- If a date on the calendar is blank, there are no appointments of the selected type for the chosen staff or resource.

About Combined View

The Combined View on the Scheduler displays Monthly Schedule in the top part of the panel and Daily Schedule in the bottom part of the panel. The specifications for Month View and Day View apply to this view. Refer to those sections for more information on how to work with Combined View.
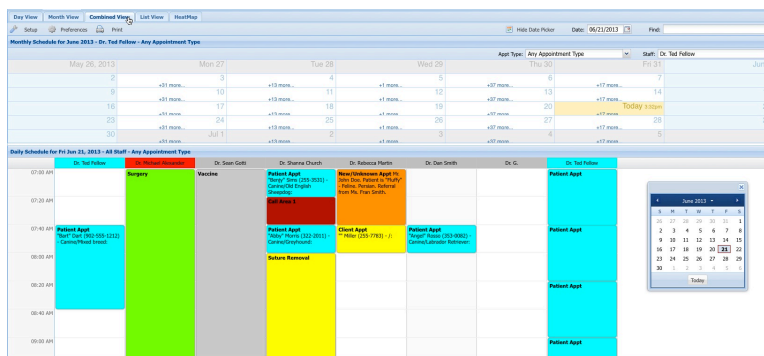
Between the toolbar (with the **Setup**, **Preferences** and **Print** buttons) and the filters for the Monthly Schedule part of the panel, the month being viewed is shown in the date format "Monthly Schedule for <Month, Year> - Appointment Staff - Appointment Type". Changing the month in the **Date** field changes the month displayed.

Between the bottom of the Monthly Schedule portion of the Combined View and the column headings/titles for the Daily Schedule grid, the date being viewed is shown in the format "Daily

Schedule for <Day of Week, Month Day of month, Year> - All Staff – Appointment Type. Changing the day being viewed changes the date displayed in the Daily Schedule section, but the Monthly Schedule area will only change if you change the month from the Date or Date Picker.

About List View

The List View on the Appointment Scheduler displays a list of appointments over a specified number of days. The default view is to show a list of all appointments for the current date. The column options are Date, Time, Duration, Appointment Type, Appointment Staff or Resource, Appointment Status, Checked In Reason, Client Name, Patient Name, Address, City, Email, Phone1, Phone 2, Comments.

Text at the bottom right of the list indicates the number of records displayed in the format "Displaying 1-X of X". You can move though pages in List View using the directional arrows at the bottom left of the panel.

 You cannot add new appointments from List View. You can edit or delete existing appointments; open client or patient records or change the check-in or status value of an appointment from List View.

Number of Days in List View

By default, List View shows a list of all appointments for the current date. To change the number of days of appointments displayed:

- From List View, type a value in days in the **No. Days** field, located at the top of the List View panel.
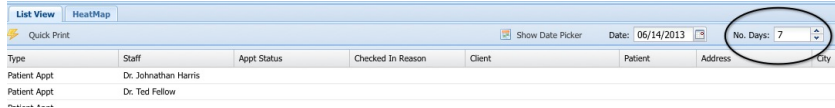
- The default display moves from the current day forward, so if you type 3 in the **No. Days** field, you will see appointments for the current day plus the following 2 days.

- If you want to look back a few days, you will need to change the date in the **Date** field to an appropriate start date in the past, then set the **No. Days** from that point forward to build your list.

Sorting the Appointment List in List View

The list of appointments can be sorted by any of the column headings under List View.

To sort the list of appointments:

- From the list, click on the column heading by which you would like to sort the list.
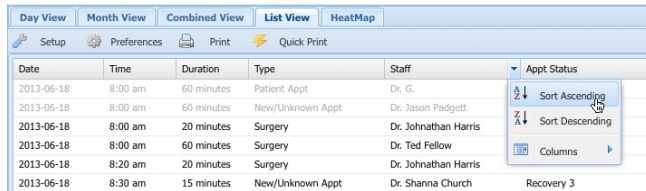
- From the drop down menu, choose to sort the list by the column heading in Ascending or Descending order by selecting **SortAscending** or **Sort Descending** from the menu.

Display or Hide Columns in List View

The appointments list displays with a set of default columns. It is possible to hide the display of columns. To display or hide columns from the list:

- From the records list, move your pointer or "mouse over" the heading of a column on the list.

- Note that there is an arrow on the right side of the column heading. Click on the arrow to display the drop down menu.

- Click **Columns** from the menu to see the list of columns that can be displayed or hidden.

- Click on an item to select it and have it appear on the list. An item is selected if there is a checkmark in the box beside the column name.

- To hide a column so that it does not appear on the list, click the associated checkbox to remove the mark from the box. An item is hidden or deselected if there is no checkmark in the box beside the column name.

About Heat Map View

The Heat Map displays a one month calendar, defaulting to the current month, showing the approximate percentage of time booked for client- and patient-associated appointments per day in relation to the total hours for which the clinic is open daily (as defined under Scheduler Setup).

The Heat Map uses level of cell opacity (the boldness of the color of a day on the grid) to visually indicate how busy the clinic is overall. The darker or less opaque the color on a day, the greater the number of appointments booked for that day. So, if a day on the Heat Map is a solid red, the day is booked close to capacity, while a very opaque or pale red indicates significant availability on the day. Clicking on a day on the Heat Map opens the Day View for that day.
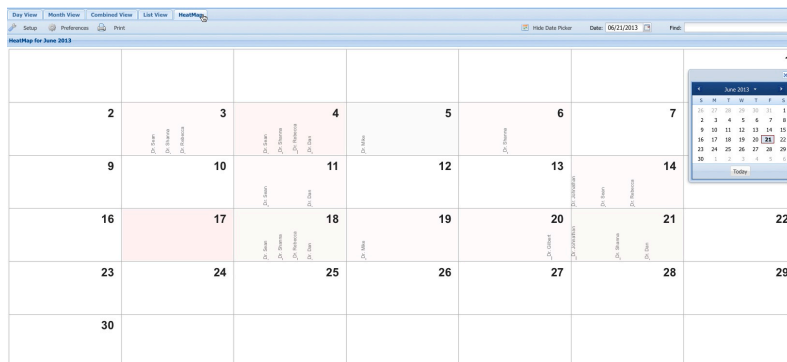
There is a vertical bar representing how busy each staff or resource is on each day, much like a bar graph. The height of the bar indicates how busy the staff or resource is for the day. The taller the bar, the busier the resource.

ℹ️ You cannot work with appointments from Heat Map view. The Heat Map is only intended to provide a visual indication of clinic productivity over a selected month.

⚠️ The Heat Map is intended as a quick, visual reference and does not represent an exact ratio of booking:capacity. Appointments not linked to a client or patient are not included in the Map.

Multi-Site Scheduler and MPA

Among many other advantages, DVMAX permits MPA users to access Schedulers for all of the clinics associated with their multi-site practice. That means if you have a multi-site practice, you can schedule appointments at your local site as well as any of your associated remote clinics. In fact, DVMAX lets you access the appointment book for any of your clinics. If you use the multi-site scheduling feature (only available with MPA, DVMAX v8 and higher), each remote clinic scheduler will have the site name/clinic at the top, identifying the location associated with the schedule. The other functions and features of the scheduler remain identical.

Working with Appointments in Day View

Day View is the default view you will see when you open the Appointment Book. You can create, edit and delete appointments in **Day View**, **Week View**, **Month View** or **Combined View**. By using the Date Picker you can quickly and easily move and copy appointments as well.

From Day View, right clicking on an appointment brings up a short pop up menu, sometimes called a contextual menu, with the following options: **Cut Appointment**, **Copy Appointment**, **Find Next Appointment**, **Go to Record**, **Double Book**, **Check-In** and **Set Status**. When you use **Cut** or **Copy**, you will enable the **Paste Appointment** option, letting you move an appointment or duplicate an appointment, respectively.
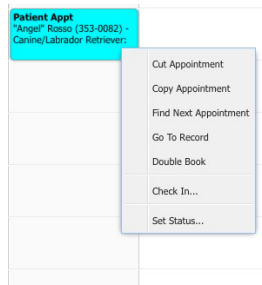
Using the Contextual (Right Click) Menu: A Summary

Cut Appointment works in combination with **Paste Appointment** to allow you to quickly move an appointment anywhere using the same cut and paste method familiar to many applications. Clicking **Cut Appointment** removes the appointment. Find the date where you wish to move the appointment, right click (or Ctrl + click) and select **Paste Appointment**.

Copy Appointment allows you to create a copy or duplicate of an existing appointment and place it in another location. Right click (or Ctrl + click) on an existing appointment, click **Copy Appointment** and then select **Paste Appointment**.

Double Book lets you quickly create a new appointment beside an existing appointment. Right click (or Ctrl + click) on a selected appointment and choose **Double Book**. An appointment is created beside the existing appointment. The appointment is the same type and length as the original appointment, but there is no associated client or patient.

Find Next Appointment locates the next scheduled appointment for the patient or client. If there is no future appointment, a dialog displays indicating this.

The **Go To Record** option in the pop up menu opens the associated Client record (if the appointment is a Client only appointment) or Patient record (for Patient appointments).

Selecting a **Check-In** lets you mark an appointment as "checked in". This marks the start of a patient or client visit. You must choose a reason for the visit from a predefined list of options. The status of the appointment will change to Checked In and this will be noted by a check mark in the top right corner of the appointment, depending on how you have configured the Check In Status Value. Visit Reasons are defined under System Constants -> Client and Patient Settings.

Selecting **Set Status** will bring up a Status drop-down menu that will allow you to express the current status of the appointment, along with a visual marker on the appointment to allow for a quick, at-a-glance view of where a patient or client is in the appointment process. Status values are defined under Appointment Setup. These values also permit you to track the amount of time a patient spends at each stage of their visit.

Moving an Appointment

Once an appointment has been created, it can be easily moved to a new date using the **Cut Appointment** and **Paste Appointment** options, or by dragging and dropping the appointment to a new spot on the Day View grid. **Cut Appointment** is only available in **Day View** and from the Daily Schedule section of **Combined View**.

Using Drag and Drop to Move an Appointment

If you want to move a previously scheduled appointment to another time but the same day within Day View, you can easily **Drag** and **Drop** the appointment to its new time. To drag and drop an appointment in Day View:

- Click on the appointment you wish to move. The mouse cursor (pointer) will change to a "hand" pointer and "grab" the appointment.
- Drag the appointment to a new time on the grid and drop the appointment.

- If you move the appointment to a different staff or resource, you will be asked to confirm the move. Click **Yes** to proceed or **No** to cancel. If you click **No**, the appointment will not be moved.

- If staff initials are required, enter your staff code in the **Staff Code** pop up.

Dragging and Dropping Beyond the Displayed Columns or Rows

You can use the **Drag and Drop** method as long as you are moving an appointment to a different time within the current day, even if all columns or rows are not showing on the screen.

- Click and drag in the same manner as above, but drag just past the outside boundaries of the grid to "force" the browser to scroll up/down or left/right (with the same effect as though you had used the scroll bar).

- When you click and drag, you cannot use the scroll bar, since the mouse is needed for this function, and it is already in use.

- You may find using **Cut Appointment** and **Paste Appointment** a more convenient way to reschedule an appointment if you need to move it outside of the current window. You will need to use Cut/Paste to move the appointment to a new date.

Using Cut Appointment

The **Drag and Drop** method is one way to move an appointment, but it only works to move an appointment within the same day. You must use **Cut and Paste** to move an appointment to a different date. **Cut and Paste** work much the same way as standard cut and paste options found in many other applications. **Cut Appointment** is only available from **Day View**, **Week View** and the Daily Schedule section of **Combined View**.

To move an appointment using **Cut and Paste**:

- From the Appointment Scheduler in Day View, right click (or Ctrl + click) on the appointment you wish to move.

- From the pop up menu, select **Cut Appointment**. The appointment will be "cut" from the **Appointment** window.
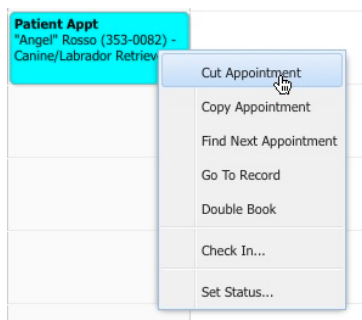
- Find the new date and time where you would like to move the appointment, by selecting a date with the Date Picker or using the Date field (see *The Appointment Calendar* section).

- Right click (or Ctrl + click) on the day and time where you would like to move the appointment and select **Paste Appointment** from the pop up.
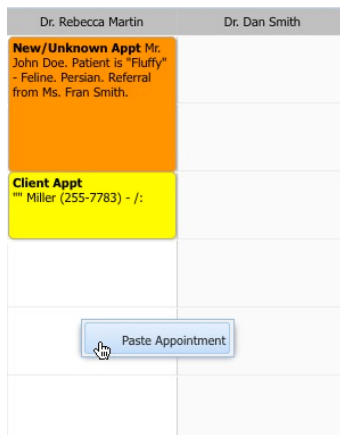
- If you move the appointment to a different staff or resource, you will be asked to confirm the move. Click **Yes** to proceed or **No** to cancel. If you click **No**, the appointment will not be moved.

⚠️ If you exit DVMAX without pasting the cut appointment, the appointment will be deleted. It will be listed in the Deleted Appointment Report.

Using Paste Appointment

When you use **Cut Appointment** or **Copy Appointment**, the **Paste Appointment** option will be available by right clicking on a time on the appointment scheduler in **Day View**, **Week View** or the **Daily Schedule** area of Combined View. See *Using Cut Appointment* or *Using Copy Appointment* for more information.

Moving an Appointment to a Different Staff Person or Resource

If you move an appointment from one staff person or resource to another (by dragging or through the Cut and Paste options), you will be prompted to confirm that you want to perform that action. Click **Yes** to continue, or **No** to return to the Scheduler. If you click **No**, the appointment will not be moved.
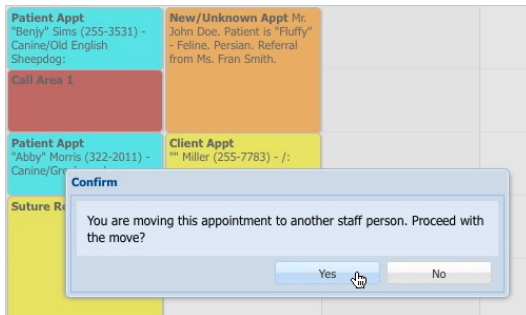
Using Copy Appointment

You can create a duplicate of an existing appointment - including Client and Patient information, appointment type and appointment length - using **Copy Appointment** and **Paste Appointment**. **Copy and Paste** works much the same way as standard copy and paste options found in many other applications. **Copy Appointment** is only available from **Day View**, **Week View** and the Daily Schedule section of **Combined View**.

To create a duplicate appointment using **Copy Appointment**:

- From the Appointment Scheduler **Day View** or **Week View**, right click (or Ctrl + click) on the appointment you wish to copy.

- From the pop up menu, select **Copy Appointment**.
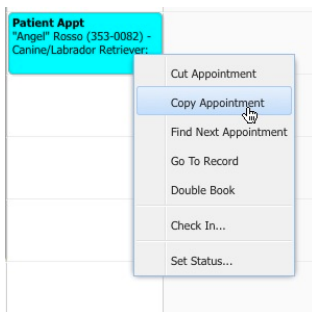
- Find the date and time where you would like to place a copy of the appointment, by selecting a date with the Date Picker or using the Date field (see *The Appointment Calendar* section).

- Right click (or Ctrl + click) on the day and time where you would like to copy the appointment.

- Select **Paste Appointment** from the pop up.

- If you copy the appointment to a different staff or resource than the original appointment, you will not be asked to confirm the change, but the appointment staff will be updated on the record to reflect the staff under the column in which the appointment is placed. This is an exact copy of the original appointment, and so maintains the appointment color and type of the original appointment.

- You can proceed to another date to create yet another copy of the appointment, right clicking again and selecting **Paste**. In this way, you can quickly create as many appointments for the same patient as needed.

Using Paste Appointment

When you use Cut Appointment or Copy Appointment, the Paste Appointment option will be available by right clicking on a time on the appointment scheduler in Day View, Week View or the Daily Schedule area of Combined View. See *Using Cut Appointment* or *Using Copy Appointment* for more information.

Using Find Next Appointment

The **Find Next Appointment** option locates the next appointment scheduled for a selected Client or Patient, if another appointment exists. **Find Next Appointment** is only available from **Day View**, **Week View** and the Daily Schedule section of **Combined View**.

To find the next appointment for a client or patient:

- From the Appointment Scheduler in Day View, right click (or Ctrl + click) on an appointment.

- From the pop up menu, select **Find Next Appointment**.
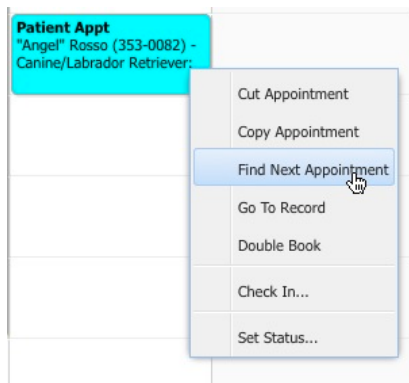
- You will be moved within the **Appointment Scheduler** to the next scheduled appointment for that Client of Patient.

- You can repeat this until no future appointment can be found.

- When there is no future appointment found, DVMAX will show you a message to that effect.
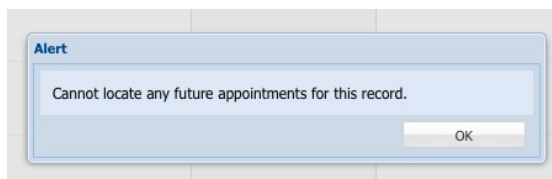
ⓘ You can use the **Find** field in the top right corner of the Scheduler to display a list of all upcoming appointments for a client or patient. Simply type a full or partial name in the field to

create a list. Click the drop down arrow if you do not see the list right away. See *Searching for Appointments Using the Find Option* for details on how to work with this functionality.

Using Go To Record: View a Client or Patient Record from the Scheduler

Once an appointment has been created, the **Go to Record** option will let you retrieve the associated file directly from the Appointment Scheduler. This makes it easy to open the file when the Client or Patient arrives for their scheduled appointment. **Go To Record** is only available from Day View, Week View and the Daily Schedule section of **Combined View** and **List View**. You may also open the client or patient record by selecting **Save and Go to Record** from an open appointment record.

To open or view an associated Client or Patient file from the Appointment Scheduler:

- From the Appointment Scheduler in Day View or Week View, right click (or Ctrl + click) on an appointment.

- From the pop up menu, select **Go to Record**.
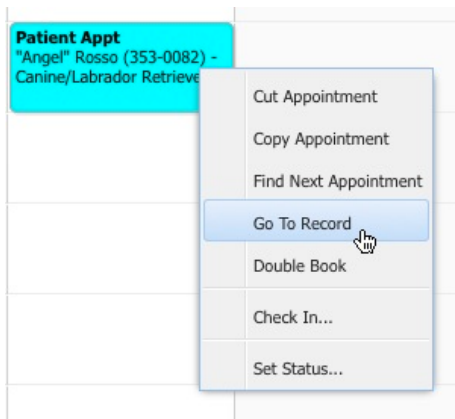
- For Client-only appointments, the associated client record will open. For appointments with an associated patient, the Patient record will open.

- Alternatively, you go to a patient or client record from an open appointment record. From the open appointment record, click **Save and Go to Record**.

About Double Booking Appointments

Double booking occurs when two or more appointments share a block of time. The **Appointment Scheduler** will allow more than one appointment at a given time, provided that the **Conflict Level** of the appointment type record (defined under Setup) permits overbooking.

When you schedule an appointment to overlap with a pre-existing one, you may get one of three responses from the scheduler depending on the conflict level set for the appointment types: Allow without a confirmation message; Allow but confirmation is required, or Overbooking is not allowed.

You can use the drag and drop method to move one existing appointment over another to create a double booking, or use the **Double Book** function to quickly and easily create a double booking.

For more on using the drag and drop method, see *Using Drag and Drop to Move an Appointment*. For more on creating and working with appointments, see the related sections in this *Appointments* chapter.

Using Double Book

The **Double Book** option lets you create a double booking with a single click. It is only available from **Day View** or from the Daily Schedule section of **Combined View**. **Double Book** displays as an option in a pop-up menu when you right click (or use Ctrl + click) on an existing appointment.

To use **Double Book**:

- Right click (or Ctrl + click) on an existing appointment.
- From the pop up menu, select **Double Book**.
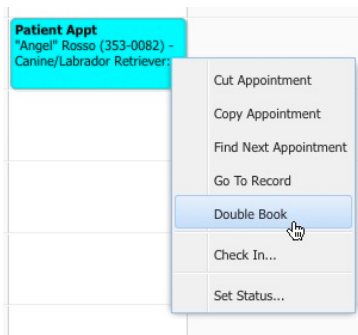
- An appointment is created beside the existing appointment with the same resource or staff. The appointment will be the same type and length as the original appointment, but there will be no associated client or patient.

- If you click **Double Book** on an appointment type that is configured under Setup as "Allow but Warn", a warning is displayed before the double booking is created. Click OK to proceed or Cancel to cancel the action.
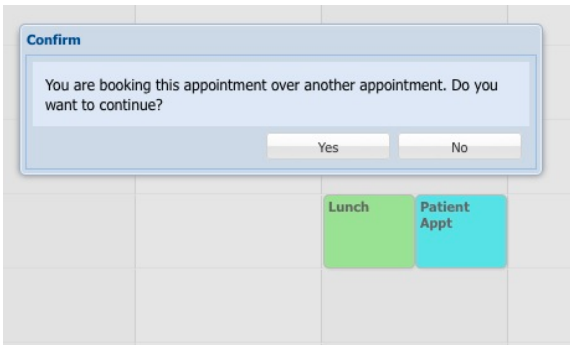
- If you click **Double Book** on an appointment type that is configured under Setup to not permit double booking, an alert will be displayed and the action is not allowed. The double booking will not be created.
- Once the double booking is created, you will need to open the appointment and assign it to a client or patient by selecting a Client/Patient from the pick list. You may also wish to change the appointment type, as needed. For more on creating and working with appointments, see the related sections in this *Appointments* chapter.

When Overbooking Prompts a Confirmation Window

Appointment Types that allow overbooking may be set to alert the user that they are about to create a new appointment or move an appointment over an existing one. A Confirm dialog box will only pop up if the **Appointment Type** has been configured with an "Allow but Warn" **Conflict Level** under Setup.

To allow the overbooking:

- Click **Yes**. The appointment will be scheduled over an existing appointment.
- Click **No** and the double booking is canceled. No new appointment will be created over the existing appointment.
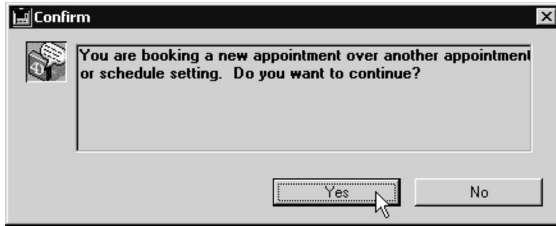
When Overbooking Is Not Allowed

Appointment Types may be defined so that overbooking is not allowed. This is configured under Appointment Setup -> **Appointment Types**. When you schedule an appointment with the **Conflict Level** "**No Overbooking**", no other appointments for the same staff member may be booked to overlap with it. A dialog will display indicating this.

Overbooking Alert When No Other Appointment Is Visible

Occasionally, more than one user may try to reserve or book an appointment for the same patient or client on the scheduler at the exact same moment on different terminals. For example:

Receptionist A is in the process of booking an appointment for Tuesday morning at 10AM with Dr. John Smith from terminal A. In another room, Receptionist B is also creating an appointment for Tuesday morning at 10AM with Dr. John Smith.

In such cases, DVMAX provides immediate conflict checking to let Receptionist B know that they are drawing an appointment in a slot that is already being booked by Receptionist A. While the new appointment may not yet show on the grid because the scheduler has not refreshed, DVMAX will display an alert: "You are booking this appointment over another appointment, do you want to continue?"

To continue, click OK and continue with scheduling the appointment. Click Cancel to book into a different time slot. This first alert is simply to tell you that the time slot already contains an appointment, even though it may not yet be visible.

Note that all conflict level settings for appointment types will still be respected, so when it is time to save the second appointment in the time slot, you will again see the alert. When you schedule an appointment with the appointment type **Conflict Level** "**No Overbooking**", no other appointments for the same staff member may be booked to overlap with it. A dialog will display indicating this.

Overbooking When Using MPA and Multi Site Scheduler

Because users of the MPA multi-site scheduling feature can book appointments at any of the clinics associated with the MPA practice, occasionally, more than one user may try to reserve or book an appointment for the same patient or client on a particular scheduler at the exact same moment from different clinics. For example:

A receptionist at Clinic A is in the process of booking an appointment for Tuesday morning at 10AM with Dr. John Smith at Clinic A. In another clinic across town, a receptionist at Clinic B is also creating an appointment for Tuesday morning at 10AM with Dr. John Smith at Clinic A.

In such cases, DVMAX provides immediate conflict checking to let receptionist B know that they are drawing an appointment in a slot that is already being booked by Receptionist A. While the new appointment may not yet show on the grid because the scheduler has not refreshed, DVMAX will display an alert: "You are booking this appointment over another appointment, do you want to continue?"

To continue, click OK and continue with scheduling the appointment. Click Cancel to book into a different time slot. This first alert is simply to tell you that the time slot already contains an appointment, even though it may not yet be visible.

Note that all conflict level settings for appointment types will still be respected, so when it is time to save the second appointment in the time slot, you will see the standard double booking alert. When you schedule an appointment with the appointment type **Conflict Level** "**No Over-booking**", no other appointments for the same staff member may be booked to overlap with it. A dialog will display indicating this.

Using Check In

Check In is a valuable tool that lets you keep track of when clients and patients have arrived for their appointments. When an appointment is Checked In, this marks the start of a visit record. You must choose a reason for the visit from a predefined list of options. Visit history for every appointment that was checked in can be found on the General Information tab of the associated patient and/or client record. You can also view the history of open visits for the patient or client from the associated invoice.

 Visit Reasons are defined under System Constants -> Client and Patient Settings. Refer to that section of the manual for more details on defining visit reasons.

When an appointment is "checked in", the status of the appointment will change from "blank" to "Checked In". Depending on how you have defined the status, Checked In (see Status Values under Appointment Setup), the appointment may show a green check mark or other icon in the top right corner of the appointment.

Check In is only available from **Day View**, **Week View**, the Daily Schedule section of **Combined View** and from **List View**. However, opening an appointment also lets you choose the Check In option from the **Status** menu from the Appointment Detail dialog. For more on creating and working with appointments, see the related sections in this *Appointments* chapter.

To use the Check In option from the Scheduler without opening the appointment:

- From Day View, Week View or List View, right click (or Ctrl + click) on an appointment.
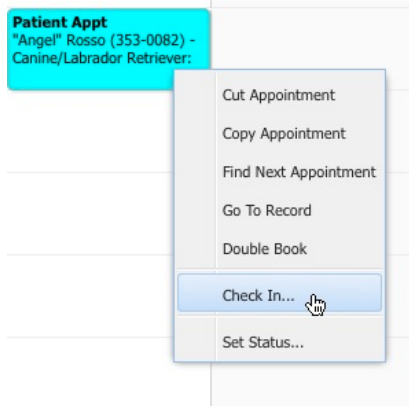
- Move the mouse pointer to the Check In option on the pop up menu. A Visit Reason dialog opens. Select a Visit Reason from the **Reason** drop down list. You may scroll the list, or type the full or partial name of the visit reason in the **Reason** field to filter the list. You can change the Reason for the visit at any time, where needed. This change will be captured in visit history.
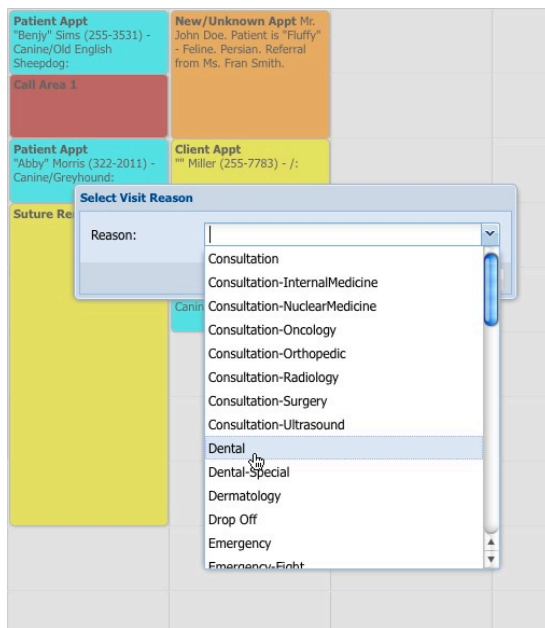
- The appointment may be marked with a green checkmark or other icon in the top right corner.

- If you open the appointment, you will note that the **Status** reads "Checked In" and the specified reason is listed in the **Reason** field of the Appointment Detail dialog. As well, there is a note in the appointment history area showing the appointment was checked in, along with the date, time and visit reason.
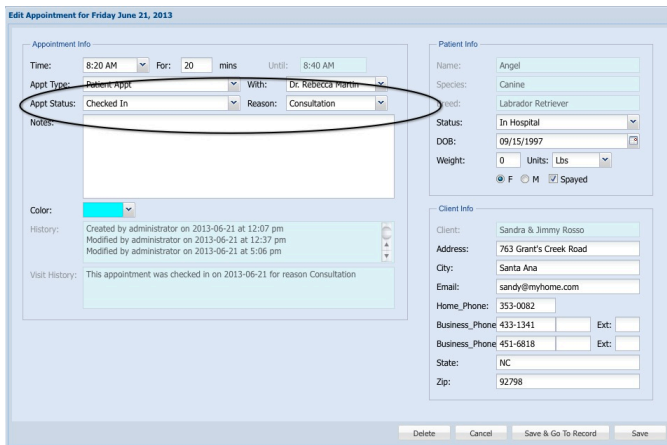
- Alternatively, you can double click to open an existing appointment to check in an appointment. Select "Checked In" from the Status menu and choose a visit reason from the drop-down list. The appointment will be checked in.
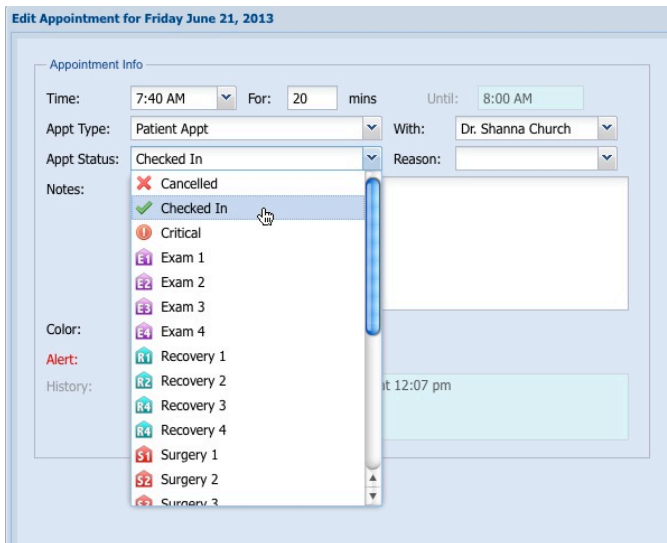
ⓘ You must select a visit reason if you choose the status **Checked In**.

Cancel Check In

If you accidentally marked an appointment as checked in, you can cancel the check in. To cancel:

- From **Day View**, **Week View** or **List View**, right click (or Ctrl + click) on an appointment.

- Select **Cancel Check In**.
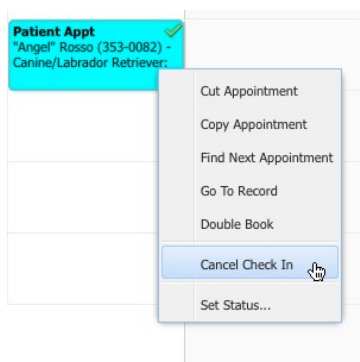
- The appointment will no longer be marked as checked in. The visit history is cleared.

ⓘ

As initial appointment color and status of the appointment are saved when you do a check in, when you cancel the check in at any time in the future, the color and status of the appointment are reverted to the values held at the time of the check in.

ⓘ The **Cancel Check In** button is only available for active visits where the patient is already checked in. Once the visit is closed, the scheduler may need to be refreshed in order to see that the **Cancel Check In** button is no longer available for that appointment record.

Close Visit

Once a visit is closed (from the Visits option under the Client or Patient **General Info** tab, or from an associated invoice), the Check In option and Cancel Check In option are no longer available for the appointment associated with that visit, and changing the status on an appointment will not create a visit event.

Using Set Status

Status values allow users to define the state of an appointment, as well as to track visit history from Check In to the close or end of the visit. Every appointment or clinic visit begins with Check In, which starts the visit record, and you can change the status of an appointment as the patient moves from point to point in a visit. For example, once a patient is arrives for a visit and is Checked In, you can change the status to Exam Room, to Treatment Room to Surgery to

Recovery. Every Status record can have an associated Icon that will display on the appointment label, allowing a quick visual cue as to the location and progress of the patient in your clinic.

Checking In an appointment begins the Visit, and status events are then tracked in Visit History. Visit history can be viewed from the General Info tab of a patient or associated client record. Status Values are defined under Appointment Setup. You can also view the history of open visits for the client or patient from an associated invoice.

Selecting **Set Status** will bring up a Status drop-down menu that will allow you to express the current status of the appointment, along with a visual marker on the appointment to allow for a quick, at-a-glance view of where a patient or client is in the appointment process. You can also set and change status from the open appointment record. Status values are defined under Appointment Setup. These values also permit you to track the amount of time a patient spends at each stage of their visit.

To use the Set Status option from the Scheduler without opening the appointment:

- From Day View, Week View or List View, right click (or Ctrl + click) on an appointment.
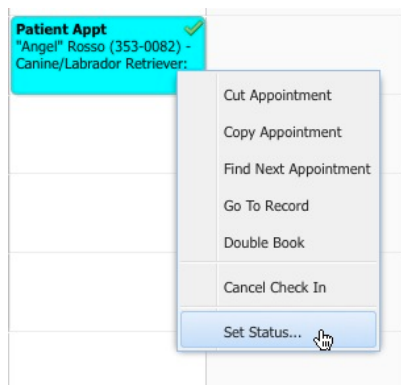
- Select **Set Status** option from the pop up menu. A Status dialog opens. Select a status from drop down list. You should make sure the appointment is checked in before you select a status if you plan to track visit history, since every Visit begins with Check In.
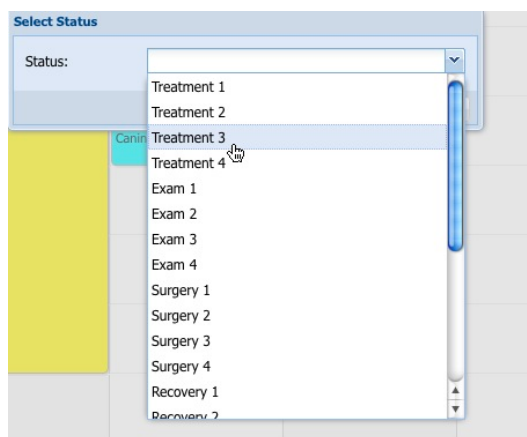
- The appointment may be marked with an icon in the top right corner, if one has been defined for that status value under Setup.

- If you open the appointment, you will note that the selected value is in the **Status** field As well, there is a note in the appointment history area showing the appointment status was changed, along with the date, time and status value.

- Alternatively, you can double click to open an existing appointment to change the status value of an appointment. From the Appointment Detail dialog, select a Status from the Status drop down list. You should make sure the appointment is checked in before you select a status if you plan to track visit history, since every Visit begins with Check In.

⚠ Every appointment Visit must begin with the **Checked In** status or the Visit History will not be tracked in the patient or client record. The status Checked In indicates the start of a Visit record, while all other status events relate back to the Visit record. Once the appointment is Checked In, the Reason drop down will be available. You can change the Reason for the visit at any time, where needed. This change will be captured in visit history.

Creating an Appointment for an Existing Client or Patient

Creating an appointment in DVMAX is fast and easy. Once you have reviewed the basic components of the Appointment Scheduler, you will be equipped to take full advantage of the flexible scheduling options available to you.

Creating Appointments with Multi-Site Scheduling

This is a new feature introduced with DVMAX v8. Once MPA and multi-site scheduling has been configured, users can schedule and work with appointment schedulers across all clinics in the multi-site practice. That means that a user at Site A can create appointments both for their own clinic and for any other clinics that are part of the same practice group simply by opening that site's scheduler from the Command Palette.

To open a scheduler for your current location, simply click the Appointment icon on the Command Palette. To open a scheduler for a remote clinic, right click on the Appointment icon in the Command Palette and select the schedule with which you would like to work. You can have multiple schedulers open at one time, and each scheduler will be titled with the defined clinic name or site name.

⚠ If you have several schedulers open at one time, take care when creating an appointment that you have selected the location at which you meant to scheduler the appointment.

Creating an Appointment: A Quick Summary

You can create new appointments from **Day View**, **Week View**, **Month View** and **Combined View** on the DVMAX Appointment Scheduler. Use the following process to create an appointment for an existing Patient or Client. If you want to make an appointment for a new Patient or Client (one who does not yet have a record), see the appropriate section later in this chapter.

If you are creating an appointment from a Client or Patient record, the process can be summarized as follows:

- Open the record for the Client or Patient for whom you want to make the appointment.

- Select **Set Appointment** from the **Client** or **Patient** pull-down menu. This will open the **Appointment Scheduler** to **Day View**. If you prefer, you can move to Month View or Combined View.

ℹ DVMAX will automatically save a new patient record when you select **Set Appointment** if you have not yet saved the new patient record.

- When the Scheduler opens, the name of the client or patient for whom the appointment is to be made is displayed in large, bold font at the top of the Scheduler window.

- The Scheduler opens to the current date by default. Select a different date, using the Calendar or Date Picker if needed.

- Select a start time for the appointment by clicking and dragging on time on the Scheduler for the day you want to create the appointment. Release the mouse when the appointment box is drawn. A rectangular outline will appear, showing where the appointment will be created when you use the click and drag method. When you release the mouse button, a new appointment area will be drawn in color. Alternatively, you can double click on an appointment time block in Day View or a date in Month View.

- A **Create Appointment** window opens. Define appointment details and enter comments if desired.

- When you create a client or patient appointment from the client or patient record, the basic client information (including name, client ID, client file number and contact details) and patient name (including name, gender and species/breed) will display on the right side of the Create Appointment dialog under the Patient Info and Client Info areas.

- Click **Save** to confirm the appointment or click **Cancel** to return to the **Appointment Scheduler** without creating the appointment.

- Enter your Staff ID if required.

To create an appointment directly from the Appointment Scheduler:

- In Day View, select a start time for the appointment by clicking and dragging on time on the **Appointment Scheduler** for the day you have selected. Release the mouse when the appointment box is drawn. Alternatively, double click on a time block.

- In Week View, click and drag on a date and time. In Month View, double click on a day on the Month View grid.

- An **Appointment Detail** window opens.

- Use the Search area of the Appointment dialog to find the Client or Patient for whom you want to create the appointment. Type a name or partial name in the Client Filter field or Patient filter field and select the client/patient record from the pick list.
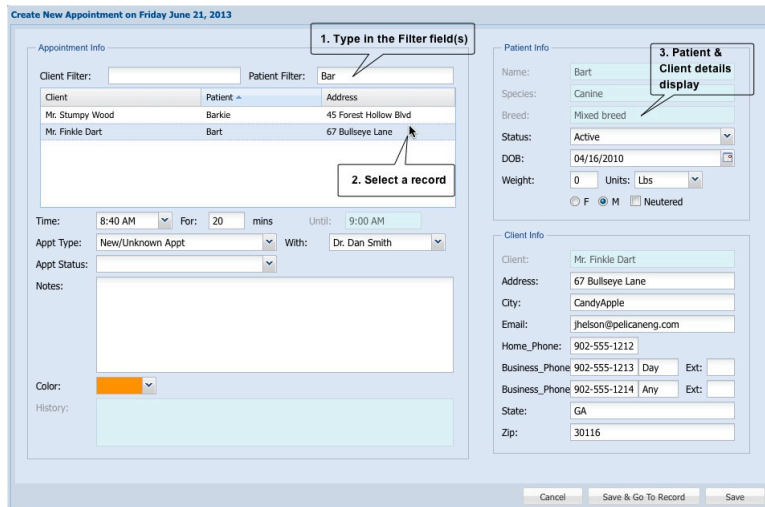
ℹ️ When you select a client/patient record from the pick list, the basic client information (including name and contact details) and patient name (including name, DOB, gender and species/breed) will display on the right side of the Create Appointment dialog.

- For a Client-Only appointment for an existing client, from the Appointment Detail area, type a full or partial Client name in the **Client** field and select the Client record from the list. Select **Client Appt** from the **Appt Type** drop down list.
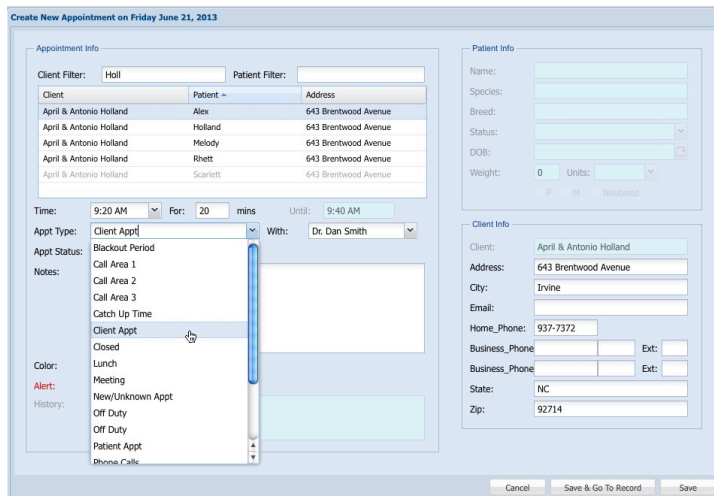
- To create a patient appointment for an existing patient, from the Appointment Detail area, type a full or partial patient name in the Patient field. Use the Client and Patient fields to filter the Client/Patient list.

- Select an Appointment Staff from the **With** drop down menu. If you are creating an appointment from Day View, this field will be populated with the staff under whose column you are creating the appointment.

- Define appointment details and enter comments if desired.

- Click **Save** to confirm the appointment, **Save and Check In** (if the client/patient has arrived), or click **Cancel** to return to the **Appointment Scheduler** without creating the appointment.

- Enter your Staff ID if required.

⚠️ It is possible to make an appointment for a deceased patient. Deceased patients are indicated in gray font in the Client/Patient pick list. The deceased status will be noted in the Patient Information section of the Appointment Detail dialog as well.

Using Client and Patient Filters When Making an Appointment

You can create a client or patient appointment directly from the Client or Patient record using **Set Appointment** from the Client or Patient menu, respectively. You can also create an appointment on the Scheduler by clicking and dragging to draw in the appointment block on the grid and then using the Client and Patient filters and pick list to select a record.

To use the search function to find a client or patient for whom you wish to create an appointment:
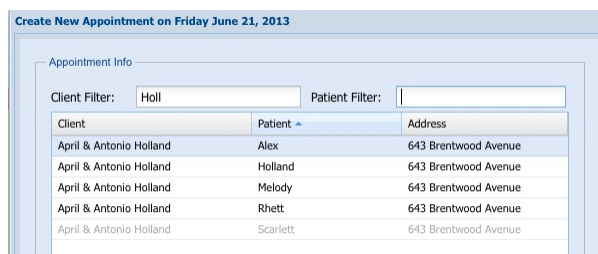
- To find a Client record, type a full or partial client name in the **Client Filter**. You may need to press <TAB> to filter the list.

- To find a Patient record, type a full or partial Client name in the **Client Filter** and/or type a full or partial name in the **Patient Filter**. You may need to press <TAB> to filter the list.

- From the Pick List, click to select the record for which to create the appointment. The name of the Client and Patient will display in the Client and Patient Info areas.

Tips for Searching for Clients and Patients When Creating an Appointment

Here are some important useful tips for using the Filters and Pick List:

- The Appointment Detail dialog has 2 filters, a **Client Filter** and a **Patient Filter**. You can search using one or both filters. Type a full or partial name in the appropriate filter. The more exact you are, the more the pick list will be narrowed.

ℹ️ Note in this illustrated example, when you type only the first few letters of the Client name, you have a list of records that match the Client name.

When you add the first few letters of the Patient name as well, you narrow the list of records and the record you are looking for is much easier to locate.

- Depending on your DVMAX configuration (determined by Advanced Settings), the filters either work on keystroke (the list is filtered as you type) or the filters allow you to type and once you press <TAB> the pick list is sorted by what you typed. This "search on keystroke" functionality may not be ideal for clinics with very a very large number of records, as it does take more time to perform this type of search.

- DVMAX does not display the complete list of client and patient records in the pick list, as that would greatly slow down the search. Instead, the Scheduler presents a predefined number of records (configured under Advanced Settings) at one time. However, the Scheduler searches every record in your database to find the record you want.

- If a Client has more than one animal, typing the Client name in the Client Filter will display an alphabetical list of all patients associated with that client. You can then select the appropriate patient record from the pick list.

Editing Client or Patient Info from an Appointment Record

You can edit certain client and patient details directly from the appointment record. For a patient record, you can edit Patient Status (Active, Deceased, In Hospital), DOB, Weight, Gender and whether the patient is Spayed/Neutered. You cannot edit Name, Species or Breed from the appointment record. For a Client, you can edit Client address, email and phone number from the appointment record. You cannot edit the client's name, client ID or File Number from the appointment record.

⚠ If the Client or Patient record associated with the appointment you are creating is open in DVMAX, you will see a note under the Client Info and/or Patient Info areas indicating that the Client or Patient fields in the appointment record cannot be edited.

Selecting an Appointment Date and Time

Before you can make an appointment, you need to display the selected date on the **Appointment Scheduler**, much like opening a paper Appointment book to the proper page. By default, the **Appointment Scheduler** will open in **DayView**, showing appointments for the current date. In **Month View**, it will show appointments for a one-month period, defaulting to the current month.

⚠ You cannot edit the date of an appointment from the Appointment Detail dialog, although you can use the **Cut Appointment** functionality to move an existing appointment to a new date. For new appointments, you must create the appointment from the date for which you want to schedule it. Use the Date Picker or Date field to open the Scheduler to the appropriate date, then make the appointment.

See the related sections on using the Date Picker and Date Field in this *Appointments* chapter.

Making an Appointment from Day View or Week View

With the Appointment Scheduler open in **Day View**, **Week View** or the Daily Scheduler section of **Combined View** to the date for which you wish to make the appointment:

- Click and drag on a start time (the time that you want the appointment to begin) in the Appointment grid. Alternatively, double click on a time block on the grid where you want to create the appointment. Be sure to choose the staff or resource with whom to make the appointment (if applicable) by working within the appropriate column.

- A rectangular outline will appear, showing where the appointment will be created.

ⓘ The appointment will use the default appointment length defined for that type under **Setup**. You can drag down through multiple cells or change the appointment length on the Appointment Detail dialog to create a longer or shorter appointment period.

ⓘ The appointment will use the default appointment type defined under **Setup**. Choose a different appointment type from the Types list in the Appointment Detail dialog if needed.

- An **Appointment Detail** window will open. You can define the length of the appointment and other details here.

ⓘ To click and drag to create an appointment, place the mouse pointer in the cell where you want the appointment to start. Click and hold the Left mouse button. You will see a rectangle appear in the cell. Drag down and to the right to create the appointment. Release the mouse button, and the **Appointment Detail** window will open.

Double click on a time block on the grid where you want to create the appointment.

Making an Appointment from Month View

With the Appointment Scheduler open in **Month View** to the month in which you wish to make the appointment:

- Double click on the day on the **Month View** grid where you want to create the appointment.

- An **Appointment Detail** window will open. You can define the length of the appointment and other details here.

ⓘ The appointment will use the default appointment type and appointment Staff/Resource defined under **Setup**. Choose a different option from the Appointment Detail dialog if needed.

Defining Appointment Details

The **Appointment Detail** window will open after you have created an appointment on the **Day View** or **Month View** grid.

From the **Appointment Detail** window, you can modify the default appointment staff, appointment type and length of the appointment. When you have finished entering the details:

- Click **Save** to confirm the appointment details and close the window.

- Click **Cancel** to return to the **Appointment Scheduler** without booking the appointment.

- To complete the task you may be asked for your Staff ID, depending on how DVMAX is configured.

What's In the Appointment Detail Window

The date of the scheduled appointment is shown in the window title bar. The following information is in the Appointment Detail dialog:

- Client and Patient selection (who the appointment is for)

- Start Time

- Appointment Length

- End Time

- Appointment Staff or Resource

- Appointment Type

- Appointment Color

- Use Manual (Appointment) Color checkbox

- Appointment Notes

- Appointment Status

- Appointment History

- Visit History

- Patient Information Area

- Client Information Area

About Appointment History

DVMAX tracks 2 kinds of appointment history: appointment change history and visit history. In the **History** area, there is a listing of when the appointment was created and who created the appointment, as well as entries for any changes made to the appointment. When an appointment is checked in or the appointment status is changed, the information appears in the **Visit History**.
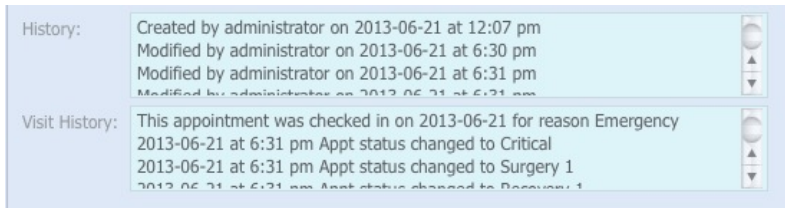
Setting or Changing the Start Time

The **Time** field shows the appointment start time you selected when you created the appointment. You can use the drop-down menu to change the start time if needed. The intervals shown on the **Time** drop down are determined by the **Time Increment** value under **Setup**.

If you want to move the appointment to an entirely different time, drag and drop the appointment to a new time, or use the **Cut Appointment** and **Paste Appointment** options. These options are only available from Day View.

To change the start time of the appointment:

- Click to select an appointment start time from the **Time** drop-down menu. The appointment times are in increments determined by the **Time Increment** value under **Setup**.

⚠️ Although it is possible to type a start time in the **Time** field, it is strongly recommended that you use the drop down menu to select a time. Typing a value that is not found in the drop down menu can create visually confusing appointment blocks or appointments outside the Start/End of day limits, which will not show up on **Day View**.

Setting or Changing the Length of the Appointment

Each appointment type has a user-defined, default duration, shown in the **For** field. This can be adjusted within the current appointment by entering a different minute value.

To change the length of the appointment:

- Backspace to delete the current value or drag over the box to highlight the box.

- Type a new appointment length.

ℹ️ If you plan to change the appointment type, select the new type first. Otherwise, changing the appointment type may reset the duration to reflect the default value for that appointment type.

Appointment End Time

The **Until** field represents the appointment end time based on Start time and duration. It will be recalculated each time you make changes to the start time or length of the appointment.

Selecting the Staff Member or Resource

The **With** field shows the name of the staff or resource with whom the appointment is scheduled.

If you have entered an appointment from **DayView**, you have already selected the staff member with whom the appointment is to be booked by your choice of column.

To select or change the staff or resource with which to schedule the appointment:

- Click to select a staff or resource from the **With** drop-down menu.

⚠ Only staff and resources that have an **Appointment Staff** record under Appointment **Setup** will appear on this list.

Selecting the Appointment Type

All appointments are automatically assigned the Appointment Type default value, defined under Setup. However, you can change the appointment type using the **Appt Type** drop-down menu.

Appointment types showing in this list have been defined under **Appointment Types** in **Setup**. Each appointment type has a default duration that will be reflected in the **For** field as you select the **Type**.

To choose an Appointment Type:

- Click to select an appointment type from the **Appt Type** drop-down menu.
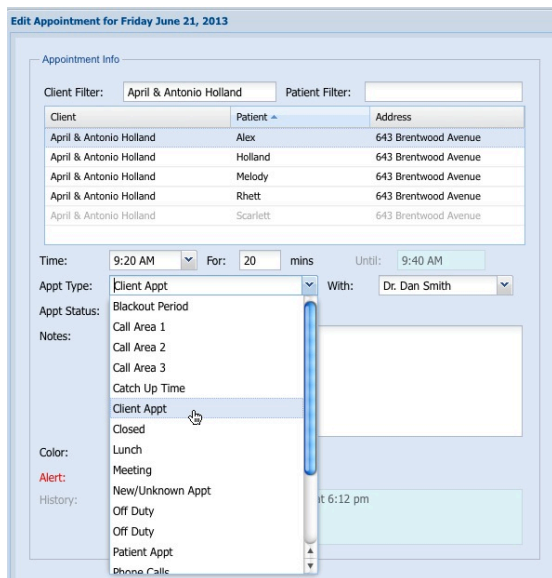
Entering Notes About the Appointment

The **Notes** area of the **Appointment Detail** window lets you add any comments about the appointment as needed.

To type Notes:

- Click anywhere within the **Notes** area.
- The typing cursor will indicate where text will begin.
- Type notes.

Changing Appointment Type Color

The default color of an appointment is determined by the **Initial Color** and **Default Color** settings under Appointment **Setup** (see related sections in this chapter for more detail). You can manually change the appointment color any time using the **Color** drop-down menu.

To choose an appointment color:

- Click to select an appointment color from the **Color** drop-down menu. This will only change the color for the appointment you are creating, not the default color for all appointments of that type.
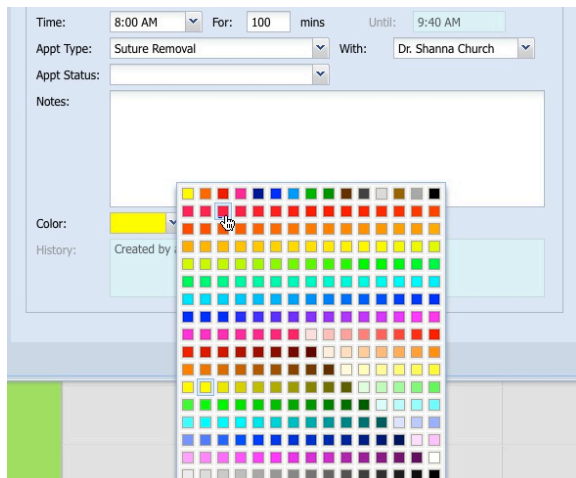
Use Manual Color Option for Appointment Color

The default color of an appointment is determined by the **Initial Color** and **Default Color** settings under Appointment **Setup** (see related sections in this chapter for more detail). You can manually change the appointment color any time using the **Color** drop-down menu.

When you select a color from the Color drop down menu, the **Use Manual Color** checkbox beside the Color drop down is automatically selected. Selecting **Use Manual Color** overrides the **Initial Color** and **Default Color** settings for this appointment, and as long as this checkbox is selected, the only way to change the color of this appointment is to do so manually.
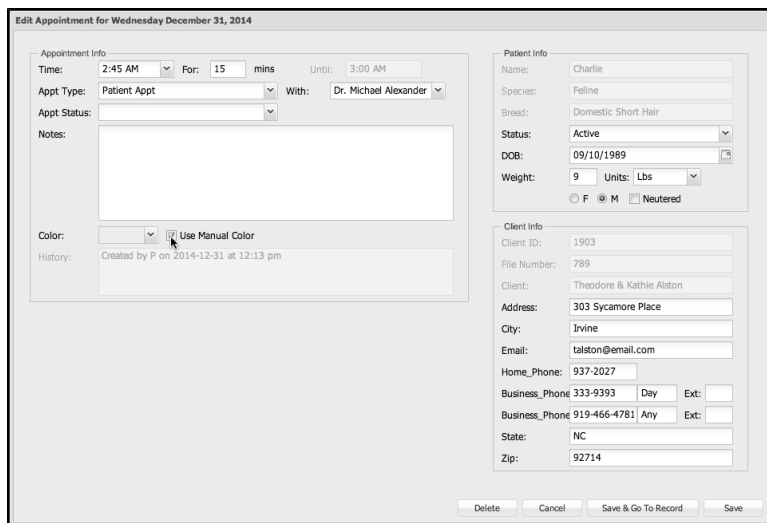
Uncheck **Use Manual Color** to have the regular color rules (as determined by Appointment Setup) take effect. Changes to this setting will not retroactively affect the appointment.

Scheduling Multiple Appointments for the Same Client or Patient

If you want to make more than one appointment for the same Client or Patient, you can use the **Shift+Save** function from the **Appointment Detail** window. Clicking <Shift>+Save or <Shift>+Check-In Reason functions like **OK and Next** button in DVMAX v7.5.1 and earlier.

To make multiple appointments:

- Make the first appointment by following the steps as outlined above under *Creating an Appointment for an Existing Client or Patient*.

- When you have finished entering information in the **Appointment Detail** dialog, hold down the <Shift> key and select **Save**.

- You will see text at the top of the Scheduler that reads "Next created appointment will be for <Client Name>" (for client-only appointments) or "Next created appointment will be for <Patient Name>", as applicable. The next created appointment will have the correct patient and/or client name pre-filled.

- Select a new date and time for the next appointment and repeat the appointment creation process.

OK and Next Appointment

See *Scheduling Multiple Appointments for the Same Client or Patient*.

Appointment Change History

You can view all the changes made to an appointment in the History area of the Appointment Detail window. The History lists appointment creation date as well as the date and time changes were made to the appointment.

If you want to see the Appointment Change history for all appointments over a specified period, see the report section for the Appointments Change History Report.

⚠️ Appointment Change History is recorded regardless of whether Staff ID is required when creating, editing and deleting appointments.

Creating an Appointment for a New Client (and Associated Patient)

You can make an appointment for a new Client two ways.

1) You can create and save a new record for the Client and associated Patient. Then, follow the basic process for *Creating an Appointment for an Existing Client or Patient*.

2) You can open the Scheduler and create a new appointment using an appointment type such as New/Unknown or whatever appointment type you may have defined under Setup for a new client who does not yet have a record in DVMAX. A new Client (and associated patient, where applicable) record can be created at a later date.

To create an appointment for a new client/patient:

- From the Command Palette, click **Appts** to open the Scheduler.

- In Day View, select a start time for the appointment by clicking and dragging on time on the **Appointment Scheduler** for the day you have selected. Release the mouse when the appointment box is drawn. Alternatively, double click on a time block.

-OR-

- In Month View, double click on a day on the Month View grid.

- An **Appointment Detail** window opens.

- Leave the Client and Patient fields blank, as there is no record for this client in DVMAX yet.

- Select the appointment type as appropriate for a New/Unknown client, since the appointment is not associated with a known Client or Patient.

- Use the **Notes** space in the **Appointment Detail** window to enter Client name, and any other details that may be known (such as phone number and animal's name).

 To create a Client Only appointment, you must select Client Appt from the Appt Type drop down list.

Modifying or Extending Existing Appointments

There are several ways in which you may want to adjust an existing appointment. You can change the length of an appointment, the type, the status, the staff or resource, edit notes and edit client or patient details.

Changing the Appointment Details

You can make changes to an existing appointment simply by double clicking on the appointment. This opens the Appointment Detail window. You can modify any of the appointment details here except the actual Date on which the appointment has been scheduled.

Changing the Appointment Length

You can adjust the length of the appointment through the **Appointment Detail** window by changing the value in the **For** field. You can also make changes to the length of an appointment in Day View by clicking and dragging on the bottom edge of the appointment. Drag up to shorten the appointment, down to lengthen it.

Deleting Appointments

To delete an appointment:

- From Day View, the Daily Scheduler section of Combined View or from Month View, double click the appointment you want to delete.

- The **Appointment Detail** window opens.

- Click **Delete**.

- From the Confirm window, click **Yes** to confirm the deletion of the appointment, or **No** to keep the appointment and return to the Detail window.
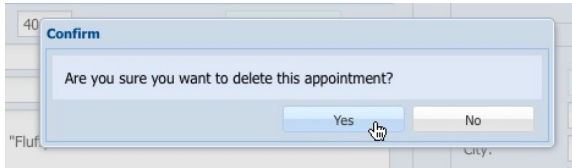
Printing an Appointment List

Printing a list of appointments form the Scheduler is slightly different depending on whether you are using an internal browser or external browser window for the Scheduler.

- To print an appointment list from the Scheduler when using an *internal browser* window, click **Print** from the bottom left corner of the **Scheduler**.

-OR-

- To print an appointment list from the Scheduler when using an external browser window, click **Print** from the top left corner of the **Scheduler**.

- Select a Start Date and an End Date range over which to print appointments.

- You can print the appointment list for every doctor in the clinic individually by selecting only a single doctor or resource at a time. Select a resource or staff by clicking the name in the Staff list. A check mark or asterisk beside the name indicates it has been selected. No check mark or asterisk means it is not selected and will not be included in the printing. Select all resources to print a complete list. Remember, these staff names correspond with the names at the top of each staff or resource column listed in Day View on the Scheduler.
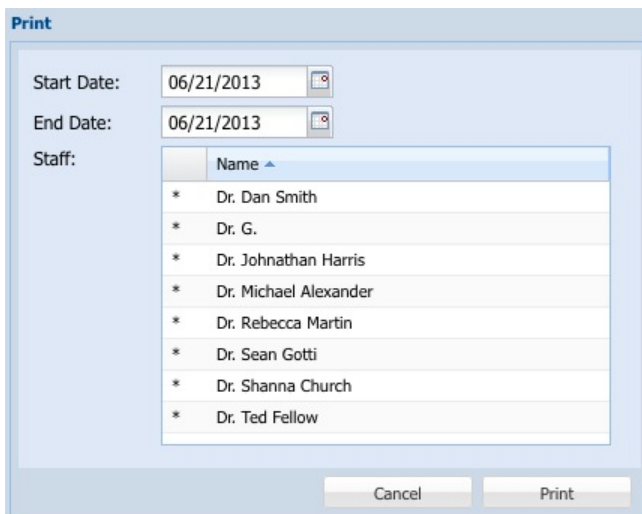
- The appointment type, appointment start time and duration, client name and phone number, patient name and appointment notes are all included on the print-out.

Printing a List of Clients by Appointment Date

To generate a list of clients with appointments within a specified date range:

- From the DVMAX main screen, click **Clients** from the Command Palette.

- From the Find dialog, select **Appointment Dates** (Start, End) from the **By** drop down menu.

- In the **Enter Date Range** field, specify a date range for which you would like to print appointments. Enter the start date followed by the end date using the format MM/DD/YY,MM/DD/YY. The default range is the current day.

- After the date range, you can specify one or more appointment staff. This lets you create a list of appointments on a given day for specified staff. To specify staff, you can use last name, first name (or partial name). The default search includes all appointment staff. The format should be MM/DD/YY,MM/DD/YY, Name

- Click **Search**.

- DVMAX returns a list of all clients with appointments in the date range specified and for the specified appointment staff.

- To print the list, select **Print** from the **File** menu, then choose **List** and click the **Print** button from the Printing Clients dialog.

Printing a List of Patients by Appointment Date

To generate a list of patients with appointments within a specified date range:

- From the DVMAX main screen, click **Patients** from the Command Palette.

- From the Find dialog, select **Appointment Dates** (Start, End) from the **By** drop down menu.

- In the **Enter Date Range** field, specify a date range for which you would like to print appointments. Enter the start date followed by the end date using the format MM/DD/YY, MM/DD/YY. The default range is the current day.

- After the date range, you can specify one or more appointment staff. This lets you create a list of appointments on a given day for specified staff. To specify staff, you can use last name, first name (or partial name). The default search includes all appointment staff. The format should be MM/DD/YY,MM/DD/YY, Name
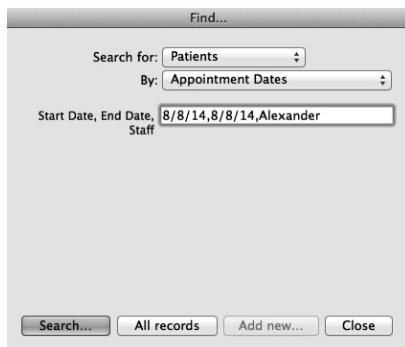
- Click **Search**.

- DVMAX returns a list of all patients with appointments in the date range specified and for the appointment staff specified.

- To print the list, select **Print** from the **File** menu, then choose **List** and click the **Print** button from the Printing Patients dialog.

Appointment Reports

Using the **Print** option from the Scheduler provides you with a quick method for printing a list of appointments for one or more staff or resource over a specified date range. There are also a number of Appointment-related report options available from **General Management** under the **Section** menu from the DVMAX main screen. Refer to the *Reports* chapter for more information.

Appointment Listing – The Appointment Listing general report shows all appointments within a user-specified date range. It is much like the Appointment List you can generate from the **Print** option on the Scheduler, except the Appointment Listing report prints a list for all staff and resources. There is no option to select specific staff.

Appointment Change History – The Appointment Change History report lists those appointments that have been changed within a user-specified date range. This report requires you to have the **Require User Initials** option enabled under Appointment Setup.

Appointment List by Staff – This custom report shows client, patient and appointment information for selected staff in a selected date range. This report offers more options than other reports that list appointments. It allows you to also include details such as appointment type and appointment duration.

Deleted Appointments – This custom report provides a list of deleted appointments over a user-defined date range.

Appointment Range Report – The Appointment Range Report is a custom report that returns appointments within a user-specified date range. The report output is information about the appointment, client, and patient. You can copy and paste this report into an Excel spreadsheet to share with third-party vendors.

Appointment Type Count and Sales - This custom report reviews appointments within a user-specified date range, totaling them by **Appointment Type**. The system then makes a comparison between the date of an appointment and any invoices on the same date with an associated client to return an estimate of sales by appointment type.

Visit Report – A custom report that provides a list of all active Visits for reference by care staff away from the Front Desk/Waiting Area. The list will show the most recently checked-in visit at the top.

Viewing the Appointments List in Web Browsers/Smartphones

You can view your Appointments in a Web browser or on a mobile browser from your Smartphone. You can also use DVMAX Anywhere on your tablet to view appointments. Refer to the *DVMAX Anywhere* chapter for more details.

To view appointments from the web, point your web browser at http://<-YourWebserverAddress>/appts/. Login using a DVMAX username that has scheduler access. When logged in, you can view any doctor's schedule in HTML or RSS (the HTML page will refresh every 5 minutes, the RSS feed refreshing is handled by the RSS reader software).

Appointment Listings for Railroad Animal Hospital

Staff:	Recent		Upcoming	
Entire Practice	HTML	RSS	HTML	RSS
Karim Phil Donot, D.V.M.	HTML	RSS	HTML	RSS
T. Boone Chewtoy, D.V.M.	HTML	RSS	HTML	RSS
Arthur Bass, V.M.D.	HTML	RSS	HTML	RSS
Surgery	HTML	RSS	HTML	RSS
May N. Cooncat, D.V.M.	HTML	RSS	HTML	RSS
New Doc	HTML	RSS	HTML	RSS
John New, D.V.M.	HTML	RSS	HTML	RSS
	HTML	RSS	HTML	RSS

For the applicable staff member, click **HTML** or **RSS**, for either Recent or Upcoming appointments. The definitions of "Recent" and "Upcoming" are Advanced Settings, by default set to 1 day. Scheduled appointments display in the web browser.

You can also view the most recent history items for any patient listed in an appointment. The number of history items listed is determined by an Advanced Setting. The default setting is 5 history items. Click the **View Recent History** link to view the history items. For more on the Advanced Settings that control web appointments and web history, please contact DVMAX Technical Support.

Bill Items

Bill Items are the key components in DVMAX's invoicing system. They represent any inventory item or service for which you would charge a client. They can also be used to place messages onto an invoice, add items to a patient history, or record other information into the patient record. As well, bill items linked to Medical Record Entries can allow an invoice to be updated automatically whenever a MRC linked to a bill item is applied to patient history.

Bill items can be linked to inventory items to help you keep track of the quantity on hand of any physical items that your practice uses or sells. Linking a bill item with one or more inventory items also allows you the option of automatically updating the price of any linked bill item if inventory costs change.

Bill Items have a wide variety of settings that can be used to control pricing of the item(s). Patient links allow a Bill Item to make a wide variety of automatic entries and adjustments to a Patient's history and record. The settings you apply to a Bill Item determine how the item behaves when used on an invoice.

Search for Bill Items

To find a Bill Item record in DVMAX:

- Select **Inventory Management** from the **Section** drop-down menu.

- Select Bill Items from the **Search For** menu.
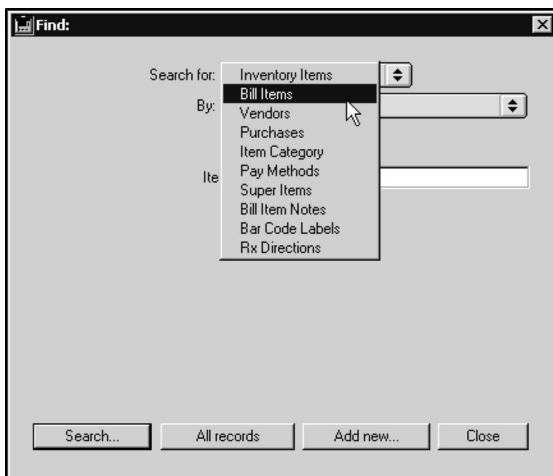
- From the **By** menu, choose a criterion (Bill Code, Description, Keyword, Linked Inventory Code, Linked Inventory Item, Category, Travel Sheet, General) from the **By** drop-down list. See **Search Criteria** for more information.

- If necessary, type requested details in the field provided. See **Search Criteria** for more information.

- Click **Search.**

- If there is more than one match for your search, the **Bill Items** window will display a list of items that matched your search.

- If there is only one Bill Item that matches your criteria, that Bill Item record will open.

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

Bill Item Record Search Criteria

DVMAX provides several predefined ways to search for Bill Item records. A description of each follows. You can also choose to use the General Search option and define your own search criteria. See the **General Searches** chapter for more information.

Search By Bill Item Code

A **Bill Item Code** search locates a Bill Item using the item's code. If you do not know the entire item code, type as much of the start of the code as you know and click **Search**. DVMAX will show a list of all items whose code starts with what you typed.

Search By Bill Item Description

A **Description** search finds Bill Items using the items' Description field. Your search term does not need to be an entire word. Note that a Description search will only match from the start of the description – that is, you must know the exact start of the description to find any matches.

Search by Keyword in Bill Item Description

A **Keyword in Description** returns a match if what you type is found anywhere in an item's description. The term you type does not need to be an entire word.

Search By Linked Inventory Code

This search locates a Bill Item using the item's linked Inventory Code. If you do not know the entire Inventory code, type as much of the start of the code as you know and click **Search**. DVMAX will show a list of all items whose code starts with the linked Inventory Code you typed.

Search By Linked Inventory Items By Description

A **Linked Inventory Items ByDescription** search finds Bill Items using the description of the Bill Items' linked Inventory Item. Your search term does not need to be an entire word. Note that a Description search will only match from the start of the description – that is, you must know the exact start of the description to find any matches.

Search By Category

This search finds Bill Items using the items' associated Category code. Type the Category or partial Category code in the Category field.

Search By Travel Sheet

This search identifies all Bill Item records tagged as Travel Sheets.

About the Bill Items List

The Bill Items List window contains a list of Bill Item records that match your search. You can see at a glance an item's code, description, net price and current cost.

To select and view a Bill Item from the Bill Items list:

- Double click the Bill Item you wish to view

-OR-

- Click once on the Bill Item you wish to view, and then click **Show**.

Creating a New Bill Item Record

To create a new Bill Item record:

- From the **Section** drop-down menu, choose **Inventory Management**.

- From the Find window, select **Bill Items** from the **Search For** list.

- Click **Add New**. A new Bill Item record window opens.

- From the General Information tab on the Bill Item window, type a unique bill item code in the **Bill Code** field.

ⓘ To help remember and organize bill item records, you can create a bill item code that uses the **Category** code plus a number, such as RX5000 for the pharmacy item Amoxicillin 50mg. This makes it easy to identify the category, such as RX, to which the bill item belongs.

- In the field to the right of the **Bill Code** field, type a bill item description. This is a brief name or description you want to give to the bill item.

- In the **Category** field, type the category code in which to place that the bill item. To display a list of all Category Codes, click the lookup icon beside the field. Select a Category Code from the list and click **OK**.

- The **Bar Code** field is used to hold a secondary bill item code. It is typically a UPC (universal product code), and it allows you to use a bar code reader/scanner to place an item on an invoice. A Bar Code is not required to create a

Bill Item, and you may choose to leave this field blank. The **Bar Code** field will be replaced by a **Provider Code** field if the **Lab Requisition** checkbox is selected. See **Integrations, Requisitions and Lab Results** for more.

- The **Provider Code** field holds the Provider-specific requisition code that has been linked to the Bill Item via the **Integrations Setup Wizard**. This field will replace the **Bar Code** field if the Lab Requisition checkbox is selected. See **Integrations, Requisitions and Lab Results** for more information.

- If the **Lab Requisition** checkbox on the Bill Item record has been selected, there will be a **Provider** drop down menu beside the **Provider Code** field. You can choose to link this Bill Item to a Lab Provider (IDEXX, Antech/Zoasis or VetLab). Once you choose the provider, you can click the lookup icon beside the Requisition Code field to choose a Requisition Code. If you already know the code, type it in the Requisition Code field. See **Integrations, Requisitions and Lab Results** for more information on linking Bill Items and Requisition Codes.

ⓘ The Bar Code can be up to 15 characters long. If your system contains data converted from another practice management program, you may want to use this field to hold the code used by your previous system for this item or service.

ⓘ The **Bar Code** field may be replaced with a **Provider Code** field where the Bill Item has been linked with a Lab Requisition provider. The **Lab Requisition** checkbox on the Bill Item record will be selected. See the chapter **Integrations, Requisitions and Lab Results** for more information on provider codes.

- Type a GL Account Code, where applicable, in the **GL Account Code** field to link the Bill Item record with a specific GL Account code. A GL Account code is not required to create a Bill Item, so you may choose to leave this field blank if you don't plan to use GL accounting features with this item.

- If the Bill Item will not be linked to an inventory item, type a simple price in the **Service Price** field. The price for a service or an inventory item whose cost does not fluctuate can be entered in the Service Price field.

- The **Inventory Price** is set under Inventory Items and cannot be adjusted from the Bill Items record. See **Linking Inventory Items to Bill Items** for more information on inventory price.

- The **Net Price** is the sum of the Service Price and Inventory Price, and it is calculated automatically. This is the price used on an invoice when billing for this item.

ⓘ **Current Cost** and **Pricing Cost** are not editable. **Current Cost** is the actual last cost paid for an inventory item (entered as a purchase). **Pricing Cost** is the cost that the bill item is using to base the bill item price on.

- Select **Minimum** if this bill item will have a minimum price when placed on an invoice. Type a minimum fee value in the field to the right of the **Minimum** checkbox. You must both select **Minimum** and type a fee value in order to use this bill item feature on an invoice. If the price based on quantity sold is below the minimum price, DVMAX will automatically charge the minimum price.

- The **Minimum** price will be used when an item's calculated Ext Price (i.e. qty x price) is below the minimum setting. In these cases the Ext price is set to the **Minimum**. In cases when the **Ext Price** is below or equal to the **Minimum** price, the **Add-On** value is added to the price before it calculates the Ext price based on quantity. Then, if that value is less than the minimum, it changes the Ext price to the minimum.

- Select **Add-On** if you want to set this item to have a set fee automatically added to the calculated price when this item is placed on an invoice. Type an add-on fee value in the field to the right of the **Add-On** checkbox. You must both select **Add-On** and type a fee value in order to use this bill item feature on an invoice. The Add-On only is added to the Ext Price when the Ext Price is equal to or above the Minimum Price. An **Add-On** is generally used for a dispensing fee or pharmacy fee.

- Type a value in the **Round Up To** field to which you want to round the extended price (the total price for the bill item, including quantity and pricing adjustments such as minimum or add-on amounts) whenever this item is sold. For example, you may choose to round the price up to the nearest $1.00. Leave this field at the default value of $0.00 to prevent any rounding of the price on an invoice.

⚠ Rounding is applied only to the price on the invoice line with this bill item on an invoice not to the invoice total.

- **Est. High Price** designates the estimated high-end cost of this bill item when applied to an estimate. The default value of the **Est. High Price** is the **Net Price**. The estimated high price can be increased as necessary to indicate a higher potential estimate, but will always be at least as much as the **Net Price** of the bill item.

- The **Administration Fee** will be added to an invoice if this Bill Item is **Administered** (as opposed to **Dispensed** – see **Invoicing** for details). DVMAX will automatically add the value you type in the **Administration Fee** field to an invoice if this Bill Item is marked as **Administered** on an invoice line.

- Select **Taxable** if the bill item will be subject to sales tax when sold to your clients. From the drop-down menu below the **Taxable** checkbox, select a sales tax rate. Sales tax rates are set in **System Constants**.

- Select **Adjustable** if you want the bill item to have an adjustable price. When an adjustable item is entered on an invoice, invisible invoice or an estimate, DVMAX will ask you to enter a price. The **Net Price** for the bill item will be the suggested price.

ⓘ The **Adjustable** setting will slow down the entry of items on an invoice. It is recommended you use it only when necessary.

- Select **Miscellaneous** if you want to be able to type a general description beside the bill item when it appears on an invoice. This makes it possible to have a general bill item for unusual charges. When you type a description on an invoice, it is unique to that invoice and it will not be stored in the bill item record for use on other invoices.

- Select **Discountable** to set the item as discountable. This is valuable if you prefer to allow discounts on only certain items in the system. DVMAX allows you to select Global Discounting on invoices (determined by Invoice Settings under System Constants). If the **Global Discounting** setting is not selected, only those bill items marked as **Discountable** can be discounted on an invoice.

- Select **Certificates** if you would like DVMAX to ask you to print certificates after completing any invoice with this item on it. This setting should be used on any service or procedure that would typically necessitate a certificate; such as rabies vaccines, spay or neuter procedures.

- Select **Non-Printing** if you would not like this item to appear as a line item on any printed invoice. All non-printing items must have a **Net Price** of $0.00.

- Select **Auto-Update Costs** if the price for the bill item should increase whenever the cost for the linked inventory item increases. If you pay more for this product, then your clients will be charged more for it as well. This option is only applicable to bill items that have linked inventory items.

ℹ️ DVMAX will never automatically lower a price, only increase it.

- Select **Travel Sheet Item** to include this item in the list of bill items that is found by selecting a search for Bill Items by Travel Sheet from the **Find** window. This option allows you to mark the common items that you may want on a basic travel sheet.

- Select **Fixed Price** if the price of the bill item will not depend on the quantity sold. This means that the final price for the client will always be the same, regardless of the quantity of this bill item sold on an invoice.

ℹ️ The **Fixed Price** option should be used with caution, since it can easily result in selling goods at a loss.

- If this is a Lab Requisition bill item (IDEXX, VetLab or Antech/Zoasis), select the **Lab Requisitions** checkbox. This will change the **Bar Code** field to a **Provider Code** field and allow you to select a provider and associated requisition code. You can also create this link from the Integrations Wizard (see **Integrations, Requisitions and Lab Results**). Note that deselecting this checkbox can break the link to the Requisition Provider for this Bill Item.

- Select **Always Dispensed** if you want to have this Bill Item default to **Dispensed** even when the item is listed on a treatment plan (where it would usually default to **Administered**).

- Type a default staff code in the **Default Dr.** field if the service described by the bill item is always rendered by a specific provider. Choosing this option assures that the appropriate provider is credited when the service is invoiced. Click **Clear** to clear the **Default Dr.** code if needed. Any default provider information for this bill item will be removed.

Creating a Super Item

A Super Item is a set of bill items, sometimes called **child** items, linked to a primary or **parent** bill item. When the bill code you add to an invoice is a Super Item, DVMAX will ask you to provide quantities and other information about the individual child items that make up the Super Item. Super Items help you bundle together a complex group of products and/or services so the invoice can capture all of the billing details quickly and easily.

An example of a Super Item might be a dental cleaning, which could include anesthesia, antibiotic injection, extraction, cleaning, polishing and more.

To create a new Super Item:

- From the **Section** drop-down menu, choose **Inventory Management**.

- From the Find window, select **Super Items** from the **Search For** list.
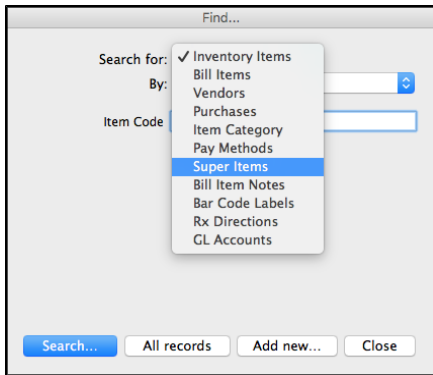
- Click **Add New**. A new Super Items record window opens.
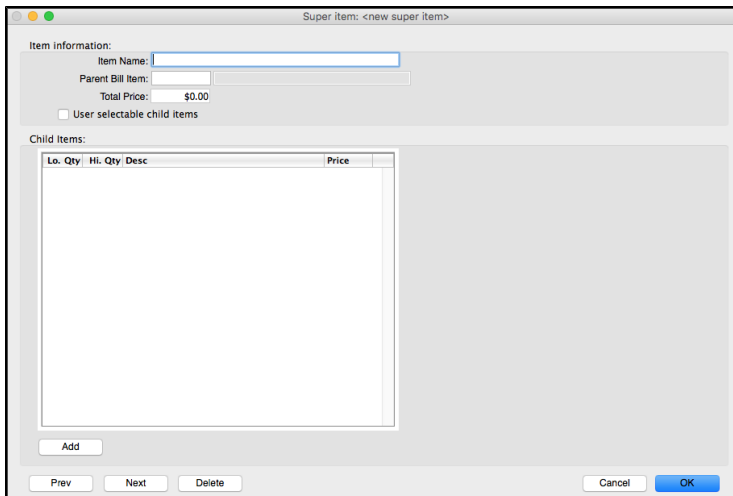
- In the **Item Name** field, type a name for your Super Item. The name must be 40 characters or less.

- In **the Parent Bill Item** field, type the Bill Item code that you want to use as the parent item, or type a partial code and press TAB to display a list of codes that match what you typed. Select a code from the Bill Items pick list.

- The price associated with the parent item will be automatically added in the **Total Price** field. The total price is not adjustable from the Super Item record. Edit the individual bill item (parent or child item) to adjust the price.

- If you want DVMAX to display a list of child items when this Super Item is applied to an invoice, choose **User Selectable Child Items**. When you apply this Super Item to an invoice or when you add a MRE linked to the Parent Item code, a list of child items associated with the parent code will display. You can then choose which child items you want to include on the invoice by selecting or deselecting items on the list.

- If you choose **User Selectable Child Items**, you will see the option **Child Items Default to Unselected**. This means that when you add a Super Item with **User Selectable Child Items** enabled to an invoice, the list of child items that

is displayed will all be deselected by default. You can then select only the child items you want to apply to the invoice.

- Add child items to the Super Item by clicking Add below the Child Items field.

- When you click Add, an **Add Child Item** dialog will open. In the Item Code field, type the bill item code you want to add to the super item or type a partial code and press TAB to display a list of codes that match what you typed. Select a code from the Bill Items pick list.

- Item price for the child item is derived from the Bill Item record and is not editable from the **Add Child Item** dialog. You must edit the Bill Item record if you want to adjust the item price.

- Enter **Low Quantity** and **High Quantity** for the child item in the respective fields. This determines what quantity of the child item will be administered/dispensed for every quantity of the parent item sold. The quantity is typically set to 1.

- Click **OK** to add the Child Item to the Super Item bundle.

- Repeat the process to add as many Child Items as you want to include in the Super Item. Remember that if you have chosen User Selectable Child Items, you will always have the option to deselect child items on a case-by-case basis from a presented list when the Super Item is added to an invoice.

- Click **OK** from the Super Item dialog to save the new Super Item record.

Modify or Edit Child Items

You can edit or delete Child Items from the Super Item record.

To edit or delete a Child Item:

- Open the Super Item record you wish to modify.

- To edit, double click on the Child Item you want to modify and make changes to the item as needed.

- To delete a Child Item, double click on the Child Item to open the dialog, then click **Delete**.

Linking Inventory Items to Bill Items

Every Bill Item record can be linked to one or more inventory items. Linking inventory items to bill items lets you accurately reflect the depletion of inventory **Quantity on Hand** for tracking and reorder purposes. It also gives you the option of using a markup percentage based on inventory cost when calculating the bill item price (the price charged to clients on an invoice). You do not need to link inventory items to bill items if you do not plan to track the physical inventory of a bill item, and/or you do not plan to use markup percentages to adjust your bill item price, such as when you are using a flat-rate **Service Price**.

There are three ways to link inventory items to bill items:

- Use the **Auto-Link** function to create a new inventory item and link it to a new bill item as you create the bill item record.

- Link an existing inventory item to a new bill item record.

- Select the **Create Item** button to create a new Inventory Item with the same item code.

ℹ Typically, an associated inventory item does not exist at the time of creating your new bill item, so using the **Auto-Link** function is the easiest way to accomplish both tasks at once.

Linking a New Inventory Item to a Bill Item Using Auto-Link

Typically, an associated inventory item record has not been created at the time you are creating a new bill item record. DVMAX's **Auto-Link** function, available from the Bill Item record window, lets you create and link a new or existing inventory item to the bill item record.

To link a new inventory item record to a new bill item record:

First create the inventory item, then complete the linked inventory item details. An overview of the steps involved in creating a linked inventory item is as follows:

- From the Bill Items window, select **Add Linked Inventory** from the **Inventory Links** drop-down menu. The **Add Linked Inventory Item** window opens.
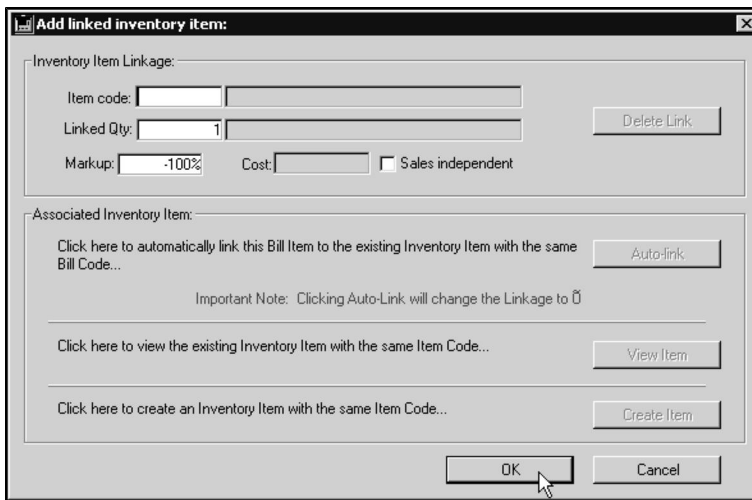
- Click **Auto-Link**. An Auto-Link Entry for Inventory Item window opens.
- Complete the Inventory Item record details. This creates a new inventory item to link to the bill item.
- Click **OK** to save the inventory item and return to the Add Linked Inventory Item window.
- From the Add Linked Inventory window, complete the linked inventory details.
- Click **OK**. The new inventory item will be linked to the bill item record.

ℹ You can also double click in the Linked inventory area to link an item.

Create a New Inventory Item through Auto-Link

To create a new inventory item to link to a bill item:

- From the **Inventory Links** drop-down menu, select **Add Linked Inventory**.

- Click **Auto-Link**. A new Inventory Item record window opens.

- The identical code and description assigned to the linked bill item will be given to the new inventory item.

- In the **Purchase Units** field, type over the default text with a description of how you purchase and receive your inventory for this item. For example, you might type **Case of 24 Cans** as the **Purchase Units** for a certain pet food.

- In the **Dispensing Units** field, type over the default text with a description of the way that this item will be dispensed to clients. For example, the units might be in **Cans** for pet food.

- Type the number of dispensing units contained in a purchase unit in the **Unit Factor** field.

ℹ️ Purchase Units Example: If a bill item is for **One Can Dog Food**, but you purchase dog food from your vendor in a case of 24 cans, the **Purchase Units** field would be **Case of 24**, the **Dispensing Units** would be **Can** and the **Unit Factor** would be **24**, because there are 24 cans of dog food in a **Case of 24**.

- Type the last cost that you paid to the vendor for this product in the **Last Cost** field. This is required if you intend to use a markup percentage in establishing the **Net Price** for the bill item.

- Type the current physical quantity on hand of this product, in terms of **Purchase Units** in the **Qty on Hand** field.

- Type the minimum quantity of **Purchase Units** you want on hand before this item appears on a reorder list in the **Reorder Minimum** field.

- Select **Rx Item** if this inventory item is a pharmacy item and should appear on your Rx Labeling list. You may also want to select **Rx item** if you wish to track the Lot # and or expiration dates of the item.

ℹ️ If the inventory item is RX, it will not appear on the RX list until you rebuild that list or quit and restart DVMAX on each terminal.

- Select **Taxable** if you pay sales taxes when **purchasing** this inventory item from the vendor. Note that this is **not** related to whether the client pays tax to your clinic for this item.

- Click **OK** to save the new inventory item record.

- The newly created inventory item will appear in the Add Linked Inventory Item window.

Link a New Inventory Item to a Bill Item

To link a new inventory item created from Auto-Link to the bill item record:

- From the Bill Items window, follow the steps listed under **Create a New Inventory Item through Auto-Link** to add the inventory item you wish to link to the bill item.

- From the Add Linked Inventory Item window, the **Item Code** should already contain the newly created inventory item code. Typically, this is the same as the bill code.

- Type a linked quantity in the **Linked Qty** field. The Linked Quantity determines how much of the inventory item to sell with this Bill Item. The quantity is measured in the units shown just to the right of this field. The units shown are the **Dispensing** units for the inventory item that was set using the **Auto-Link** function.

⚠️**Linked Quantity** controls how the inventory is depleted and must be set correctly or the inventory tracking will be incorrect.

- **Cost** reflects the cost of the inventory item and the linked quantity associated with this Bill Item. It is not editable.

- If you are setting the bill item price based on an inventory markup, enter the markup percentage in the **Markup** field.

ℹ️ The markup is the percentage above the inventory cost that you want to charge for this bill item. For example, a 50% markup = 1.5 x inventory cost. If your inventory item cost is $1.00 a can, a 50% markup will charge $1.50 per can to the client on an invoice.

⚠️ The **Markup** default value is -100%. This tells DVMAX not to use inventory costs as a determining factor for the bill item price. If you are using a flat-rate **Service Price** as the price for this bill item, and are only linking an inventory item to this bill item for tracking purposes, use the default **Markup** value.

- Select **Sales Independent** if you want DVMAX to deduct only the linked quantity of the item from inventory, regardless of how many of the bill items are sold on a single invoice line. Use this setting with caution.

- Click **OK** to save the Linked Inventory Item settings.

Link an Existing Inventory Item to a New Bill Item

Existing inventory can be linked to a new bill item. The process is similar to linking a new inventory item to a new bill item.

To link an existing inventory item to a new bill item:

- From the Bill Items window, select **Add Linked Inventory** from the **Inventory Links** drop-down menu. An Add Linked Inventory Item window opens.

- Click **Auto-Link**.

- DVMAX will link the bill item to the inventory item whose code matches the bill item code. The code for the inventory item will appear in the **Item Code** field, with the description beside the field. If there is no matching inventory item, you can create a new inventory item or link to an existing inventory item.

- Type a linked quantity in the **Linked Qty** field. The Linked Quantity determines how much of the inventory item to sell with this Bill Item. The quantity is measured in the units shown just to the right of this field. These are the **Dispensing** units for the inventory item.

⚠️**Linked Quantity** controls how the inventory is depleted and must be set correctly or the inventory tracking will be incorrect.

- **Cost** reflects the cost of the inventory item and the linked quantity associated with this Bill Item. It is not editable.

- If you are setting the bill item price based on an inventory markup, enter the markup percentage in the **Markup** field.

ℹ️ The markup is the percentage above the inventory cost that you want to charge for this bill item. For example, a 50% markup = 1.5 x inventory cost. If your inventory item cost is $1.00 a can, a 50% markup will charge $1.50 per can to the client on an invoice.

⚠️ The **Markup** default value is -100%. This tells DVMAX not to use inventory costs as a determining factor for the bill item price. If you are using a flat-rate **Service Price** as the price for this bill item, and are only linking an inventory item to this bill item for tracking purposes, use the default value

- Select **Sales Independent** if this setting is checked, the system will only deduct the linked quantity of the item from inventory, regardless of how many of the bill items are sold on a single invoice line. Use this setting with caution.

- Click **OK** to save the Linked Inventory Item settings.

⚠️ If you have just entered a newly linked inventory item with a markup percentage, you may not immediately see the new price reflected on the bill item record under **Inventory Price** and **Net Price**. To update the bill item with the new settings, select **Update Inventory Price** from the **Inventory Links** drop-down menu.

⚠️ You may encounter a message asking if you would like to link this new bill item to a MRC or a treatment after setting up the new bill item. It is strongly recommended that you always choose **Yes** even if you think it is unnecessary. Creating a linked treatment will never have a negative impact on your system, whereas not creating one can cause many problems.

Bill Items and the Patient Record

A Bill Item can be connected to any combination of Reminders, Recalls, Medical Record Entries and Diagnoses. When you place a Bill Item on an invoice, DVMAX will search for these connections and modify the Patient record accordingly.

You can see and specify links to the patient record on the **Patient Links** tab of the Bill Items screen.

The Patient Links Tab

The **Patient Links** tab is divided into 4 areas:

- **Linked Reminders:** DVMAX will apply the Reminders in this list to the Patient record when the Bill Item is entered on an Invoice.

- **Linked Recalls:** DVMAX will apply the Recalls in this list to the Patient record when the Bill Item is entered on an Invoice.

- **Linked Medical Record Entries:** DVMAX will apply the Medical Record Entries in this list to the Patient record when the Bill Item is entered on an Invoice. Typically each Bill Item has only one linked Medical Record Entry.

- **Linked Diagnoses:** DVMAX will apply the Diagnoses in this list to the Patient record when the Bill Item is entered on an Invoice. A typical diagnosis does not appear on the printed invoice.
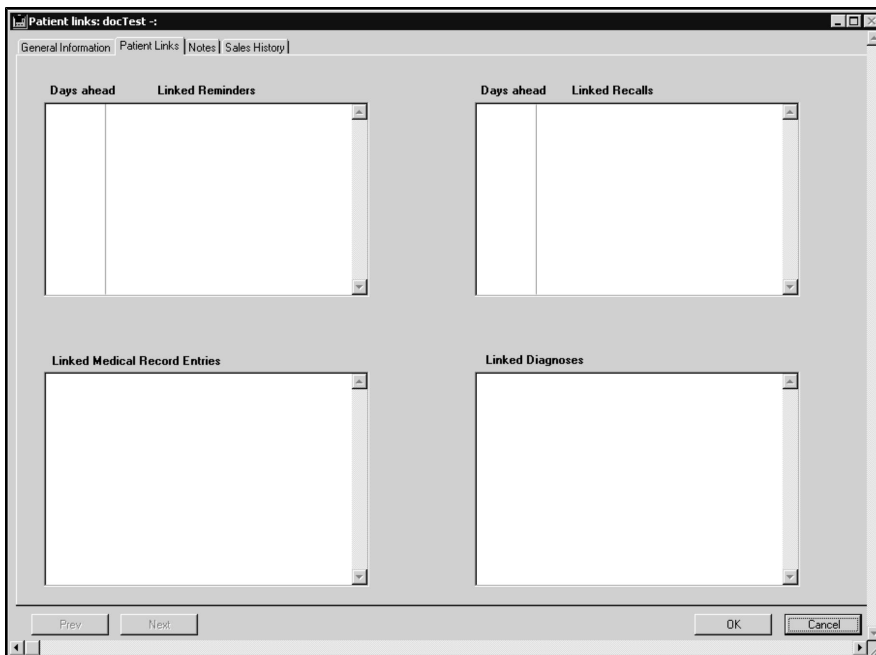
Linked Reminders

Linked Reminders tell DVMAX how to update Reminders on a Patient record when a Bill Item is used on an invoice. Linked Reminders can create new Reminders, update existing Reminders, or remove Reminders from a Patient record.

To link a Reminder to a Bill Item:

- Locate the Bill Item you wish to link.

- Click the **Patient Links** tab at the top of the Bill Item dialog.

- Choose **Add Linked Reminder** from the **Patient Links** drop-down menu.

-OR-

- Double click an empty area in the **Linked Reminders** list.

ℹ️ CONTROL+R (COMMAND+R on Macintosh) is a keyboard shortcut for **Add Linked Reminder**.

- The **Add Linked Reminder** dialog opens.

```
┌─ Add Linked Reminder: ──────────────────────────────────── ☒ ┐
│                                                               │
│  Reminder code: [      ] [                                 ]  │
│                                                               │
│     Days ahead: [---]                                         │
│                                                               │
│        □ Remove this reminder from patient record             │
│                                                               │
│   [ Delete ]              [   OK   ]   [ Cancel ]             │
│                                   ⌐                           │
└───────────────────────────────────────────────────────────────┘
```
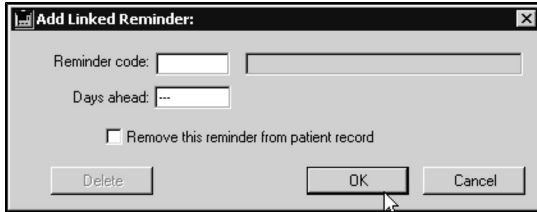
- Type the code of the Reminder you wish to link into the **Reminder Code** field. If you know the first few letters of the Reminder code, type them into the field and then press the TAB key to see a list of matches.

- Type a number into the **Days Ahead** field. This tells when to set the due date for this Reminder. This field defaults to the duration that is defined in the Reminder itself.

ℹ️ The calculation of the due date is based on the **From Administration** or **From Birthdate** setting for the Reminder type. If the selected reminder is a fixed date reminder, then the **Days Ahead** field is ignored. For more information, see **Reminders.**

- If you wish DVMAX to erase this Reminder from the Patient record when this Bill Item is placed on an invoice, select **Remove this Reminder from the Patient Record**. If you intend this Bill Item to place the Reminder on the Patient record, make sure not to select this check box.

- Click **OK** to save your changes, or **Cancel** to return to the **Patient Links** tab without saving the Reminder.

Linked Recalls

Linked Recalls tell DVMAX how to update Recalls on a Patient record when a Bill Item is used on an invoice. Linked Recalls can create new Recalls, update existing Recalls, or remove Recalls from a Patient record.

To link a Recall to a Bill Item**:**

- Locate the Bill Item you wish to link.

- Click the **Patient Links** tab at the top of the Bill Item window.

- Choose **Add Linked Recall** from the **Patient Links** drop-down menu.

-OR-

- Double click in the **Linked Recalls** list.

ℹ️ CONTROL+M (COMMAND+M on Macintosh) is a keyboard shortcut for Add Linked Recall.

- The **Add Linked Recall** dialog opens.
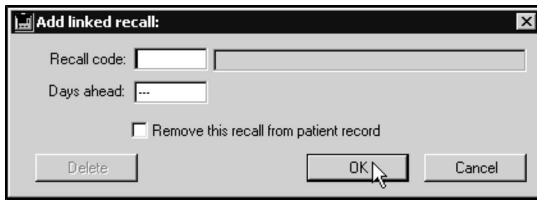
- Type the code of the Recall you wish to link into the **Recall Code** field. If you do not know the exact recall code, type the first letter into the **Recall Code** field and press **TAB**. This will bring up a window listing all existing codes.

- Type a number into the **Days Ahead** field. This tells when to set the due date for this Recall. This field defaults to the duration that is defined in the Recall itself.

ⓘ The calculation of the due date is based on the **From Administration** or **From Birthdate** setting for the Recall. If the selected reminder is a fixed date reminder, then the **Days Ahead** field is ignored. For more information, see **Recalls**.

- If you wish DVMAX to erase this Recall from the Patient record when this Bill Item is placed on an invoice, select **Remove this Recall from the Patient Record**. **If you intend this Bill Item to place the Recall on the Patient record, do not select this checkbox**.

- Click **OK** to save your changes or **Cancel** to return to the **Patient Links** dialog without saving the Recall.

Linked Medical Record Entries

Linked Medical Record Entries tell DVMAX how to update the treatment history for a Patient record when a Bill Item is used on an invoice. As well, when an MRE linked to a bill item is added to patient history, DVMAX will update the invoice accordingly.

To link a Medical Record Entry to a Bill Item:

- Locate the Bill Item you wish to link.

- Click the **Patient Links** tab at the top of the Bill Item dialog.

- Choose **Add Linked Med Rec Entry** from the **Patient Links** drop-down menu.

-OR-

- Double click in the **Linked Medical Record Entries** list.

ⓘ CONTROL+T (COMMAND+T on Macintosh) is a keyboard shortcut for **Add Linked Med Rec Entry**.

- The **Add Linked Medical Record Entry** dialog opens.
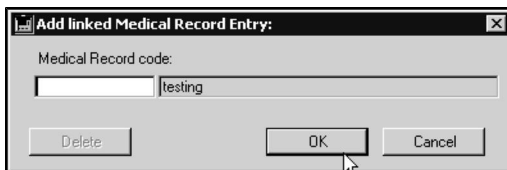
- Type the code of the Medical Record Entry you wish to link into the **Medical Record Entry Code** field. If you do not know the exact medical record code,

type the first letter into the **Medical Record Code** field and press **TAB**. This will bring up a window listing all existing codes.

- Click **OK** to save your changes, or **Cancel** to return to the **Patient Links** dialog without saving the Medical Record Entry.

Linked Diagnoses

Linked Diagnoses tell DVMAX how to update the diagnosis history for a Patient record when a Bill Item is used on an invoice.

ⓘ In most cases Bill Items with linked diagnoses are non-printing items and do not appear on a printed invoice.

To link a Diagnosis to a Bill Item:

- Locate the Bill Item you wish to link.
- Click the **Patient Links** tab at the top of the Bill Item dialog.
- Choose **Add Linked Diagnosis** from the **Patient Links** drop-down menu.

-OR-

- Double click in the Linked Diagnoses list.

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

- The **Add Linked Diagnosis dialog** opens.
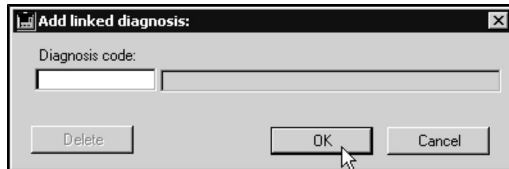
- Type the code of the Diagnosis you wish to link into the **Diagnosis code** box. If you do not know the exact Diagnostic Code, type the first letter into the **Diagnostic Code** field and press <**TAB**>. This will bring up a window listing all existing codes.
- Click **OK** to save your changes or **Cancel** to return to the **Patient Links** tab without saving the Diagnosis.

Bill Item Notes Tab

You can associate up to two **Bill Item Notes** with an individual Bill Item.

A Bill Item Note attached to a Bill Item as its **Note** is printed on any invoice containing that Bill Item. This Note should address issues present **after** a procedure is performed or treatment is provided.

A Bill Item Note attached to a Bill Item as its **Estimate Note** is printed on any estimate containing that Bill Item. Estimate Notes should address issues present **before** a procedure is performed or treatment is provided.

For more information on Bill Item Notes, see **Bill Item Notes** elsewhere in this reference.

Attaching Notes to a Bill Item

To attach notes to a Bill Item:

- Locate the Bill Item you wish to link.

- Click the **Notes** tab at the top of the Bill Item dialog.

- The **Notes** tab is split into two sections: the top section contains the Bill Item Note (which will appear on Invoices containing this Bill Item), and the lower half contains the Estimate Note (which will appear on Estimates containing this Bill Item).
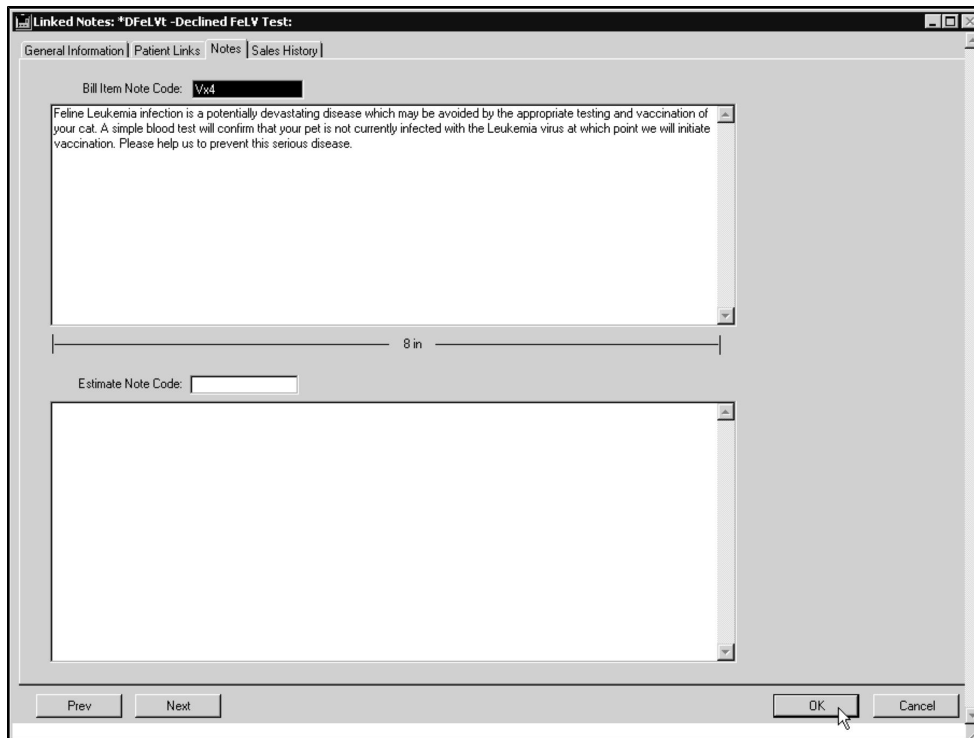
- To specify a Bill Item Note to be printed on any **Invoice** containing this Bill Item, type the code of an existing Bill Item Note into the Bill Item Note Code box. To see a list of Bill Item Notes codes to choose from, click in the **Bill Item Note Code** field and type the first letter and press <**TAB>**. This will bring up a window listing all existing codes.

- To specify a Bill Item Note to be printed on any *Estimate* containing this Bill Item, type the code of an existing Bill Item Note into the Estimate Note Code field. To see a list of Bill Item Notes codes to choose from, click in the **Bill Item Note Code** field and type the first letter and press <**TAB>**. This will bring up a window listing all existing codes.

For more information on Bill Item Notes see *Bill Item Notes* elsewhere in this reference.

Creating a New Bill Item Note from the Notes Tab

You can create a new Bill Item Note from a Bill Item's Notes tab. A Note that you create in this manner will become a regular Bill Item Note, and will be available to all other Bill Items.

For an alternate method of creating Bill Item Notes, see **Bill Item Notes** elsewhere in this reference.

To create a new Bill Item Note from a Bill Item record:

- From the **Notes** tab of a Bill Item record type a new Bill Item Code in either the **Bill Item Note Code** field or **Estimate Note Code** field.

- If the code is not currently in use, DVMAX will present a dialog informing you that the Note Code you typed is not a pre-existing Note Code.

- Click **OK**. The **Enter New Note** dialog opens, with the Code you typed previously in the **Note Code** field.
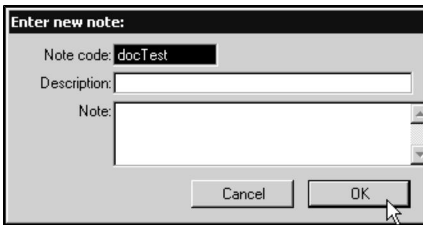
- Type a description of the new Bill Item Note in the **Description** field.

- Type the text of the new Note in the **Note** field.

- Click **OK**.

The Note field in the **Enter New Note** dialog is relatively small. If your new Bill Item Note is going to be longer than a paragraph, you may find it easier to create a Bill Item Note by following the procedures outlined in **Bill Item Notes**.

Editing a Bill Item Note from the Notes Tab

You can edit the text of an existing Bill Item Note from the **Notes** tab of the Bill Item.

The changes you make will be saved as part of the Bill Item Note linked to the Bill Item. This means they will be printed on all future Invoices containing Bill Items that use the Bill Item Note.

For an alternate method of editing Bill Item Notes, see **Bill Item Notes** elsewhere in this reference.

- From the **Notes** tab of a Bill Item, type the changes you wish to make to the Bill Item Note or the Estimate Note.

- Click anywhere outside the **Note** field, or press the <TAB> key.

- DVMAX will ask you to confirm that you wish to modify the Bill Item Note linked to this Bill Item.
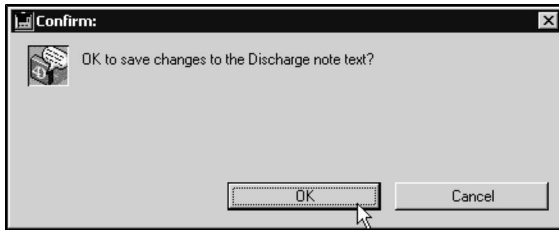
- Click **OK** to save your changes to the Bill Item Note. Click **Cancel** to discard your changes and leave the original note unchanged.

Sales History Tab

You can view an up-to-date graphical Sales History of any Bill Item in your practice at any time. You can see sales totals in terms of revenue generated and quantity of items sold.

To view Sales History:

- Open the record of the Bill Item you wish to view.

- From the Bill Item record, select the **Sales History** tab.
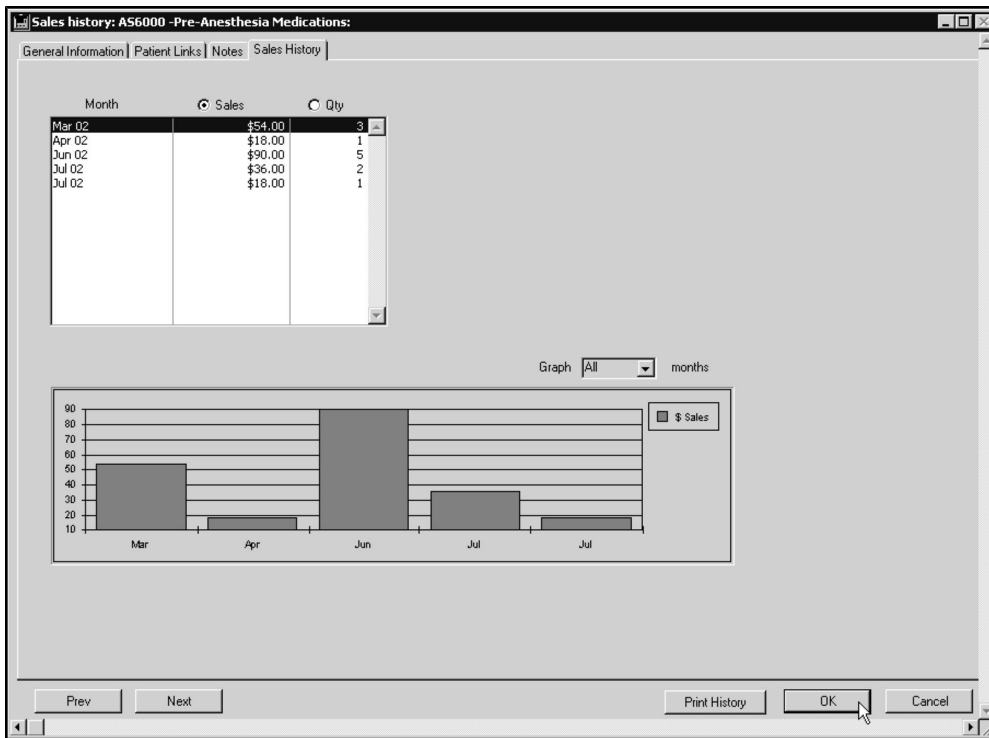
- The top part of the Sales History dialog shows the complete Sales History for the Bill Item, in chronological order. The bottom part of the screen is a graphical representation of the information in the top part of the dialog.

- By default, the graph will show sales in dollar amounts. To change the graph to show quantity, click the **Qty** radio button above the Quantity column of the sales

figures table near the top of the dialog. To change back to dollars, click the **Sales** radio button.

- To print the Sales History exactly as it appears on screen, along with a summary of this Bill Item's settings, click the **Print History** button.

ℹ️ You can click on a month in the top list to alter the graph. For example, if you click from Mar 02 to Jul 02 and change the graph pop-down to 3 months, it will show 3 months starting with Jul 02.

Bill Item Notes

DVMAX uses Bill Item Notes to define standard messages to appear on Invoices and Estimates. When a Bill Item Note is linked to a Bill Item, the text in the Bill Item Note will appear on any Invoice or Estimate that includes the Bill Item.

Bill Item Notes make it easy for you to associate a single message with more than one Bill Item, and to make sure that the same note does not appear more than once on an Invoice or Estimate.

This chapter tells you how to locate, create, modify and delete Bill Item Notes. For more information on how to use Bill Item Notes in DVMAX, see **Bill Items.**

Viewing All Bill Item Notes

To see a list of all Bill Item Notes:

- Choose **Inventory Management** from the **Section** drop-down menu on the DVMAX main screen.
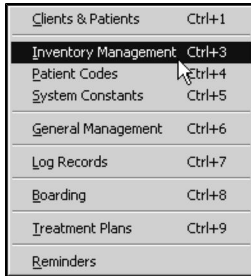
- The **Find** window opens. Select **Bill Item Notes** from the **Search For** drop-down list.
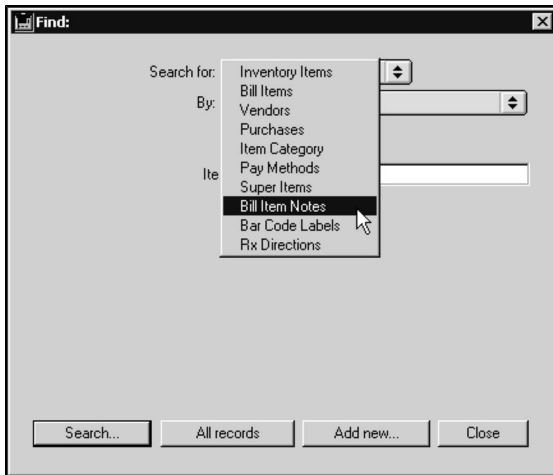
- Click **All Records**.

- A list of all Bill Item Notes displays.
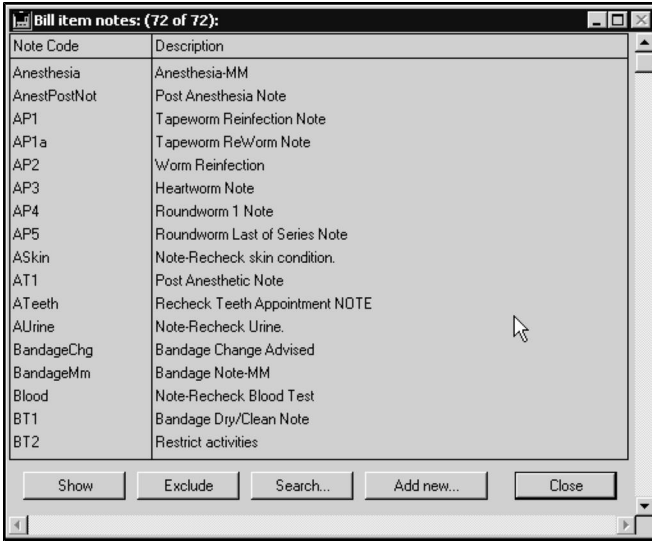
Finding a Bill Item Note

To find an existing Bill Item Note:

- Choose **Inventory Management** from the **Section** drop-down menu.

- The **Find** window opens.
- Select **Bill Item Notes** from the **Search For** drop-down list.
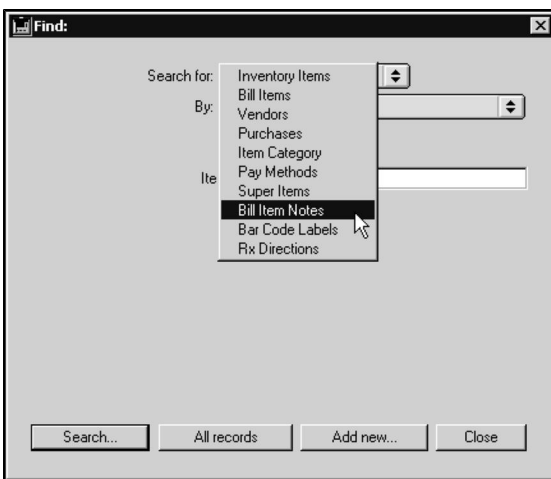
- From the **By** drop-down list, choose one of **Note Code**, **Description** or **Keyword in Notes**.
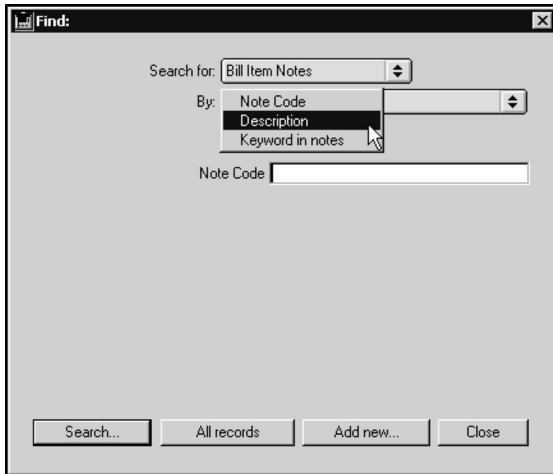
- **Note Code** will search all Note Codes for the code or partial code you type in the Note Code field. **Description** will locate all Bill Item Notes with a description that begins with the text you type. **Keyword in Notes** will find all Bill Item Notes containing the word you specify.

- Type a **Note Code**, **Description** or **Keyword** into the box below the **By** drop-down list. If you do not know a complete code or are unsure of the spelling of a Description or Keyword, type as much as you know.

- Click **Search**. If there are multiple records matching your search criteria, DVMAX will present them in a list. To view a Bill Item Note, double-click it.
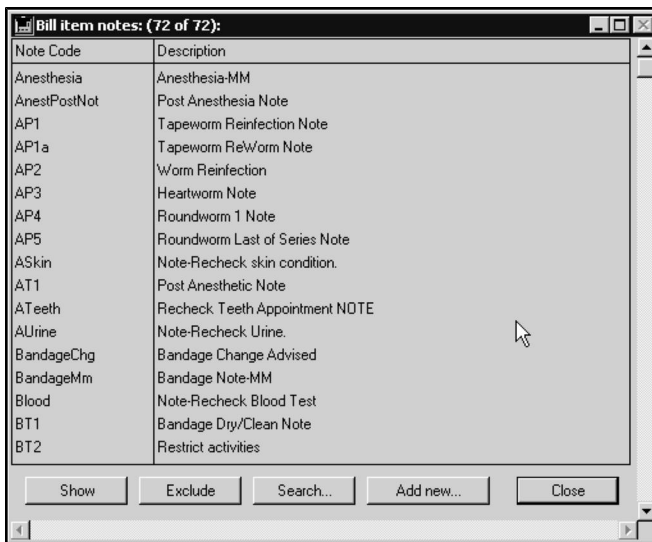
- If there is a single match for your search criteria, DVMAX will open the record.
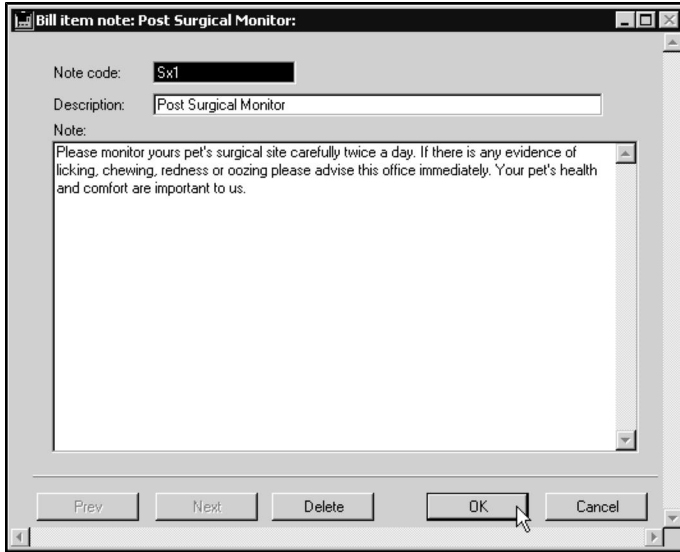
- If there are no matches for your search, DVMAX will present an Alert dialog to that effect.

- Click **OK** in this dialog to return to the **Find** window and search again.

Creating a New Bill Item Note

To create a new Bill Item Note record:

- Choose **Inventory Management** from the **Section** drop-down menu.
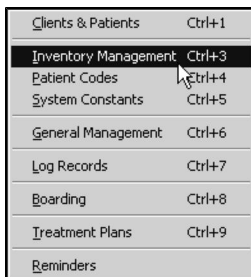
- From the **Find** window, select **Bill Item Notes** from the **Search For** drop-down list.
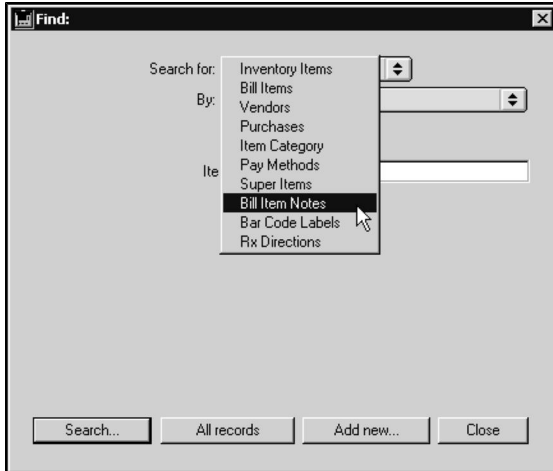
- Click **Add New**.
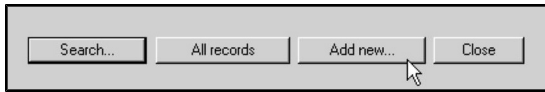
- A new Bill Item Note dialog opens.
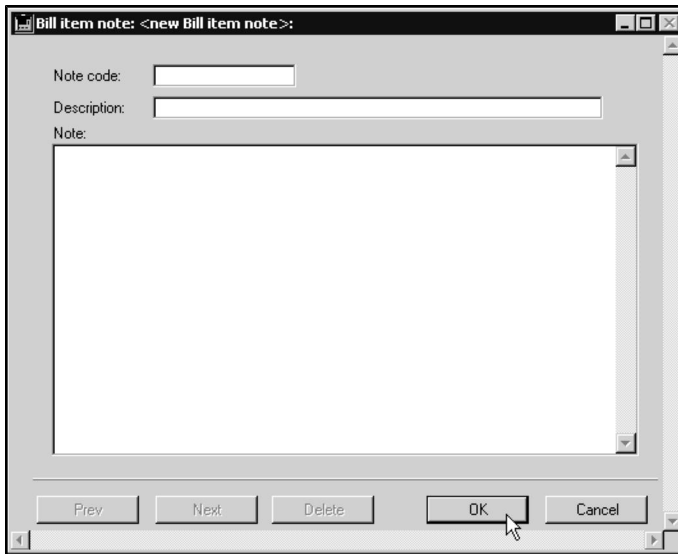
- Type a unique code for this Bill Item Note in the **Note Code** field. DVMAX will use the code you type to identify this Bill Item Note. The code you type can be **no longer than 12 characters**.

- Type a short description of this Bill Item Note in the **Description** box. The description is the name of this Bill Item Note, and can be up to 80 characters long.

- Type (or paste) the text of the Bill Item Note itself into the **Note** box. The text in the Note box is what will be printed on Invoices or Estimates, and can be up to 32,000 characters (about ten pages) long.

- Click **OK** to save the new Bill Item Note, or click **Cancel** to close the Bill Item Note dialog without saving your new Bill Item Note record.

ℹ️ You can also create a new Bill Item Note by choosing **Add New** from the **Bill Item Notes** drop-down menu when the Bill Item Notes record list is displayed. The **Bill Item Notes** menu is available when you are viewing a list of Bill Item Notes. For more information on lists of Bill Item Notes, see **Finding a Bill Item Note** and **Viewing All Bill Item Notes**.

Modifying a Bill Item Note Record

You can modify the description and text of any Bill Item Note record.

⚠️ You should **NOT** modify the **Note Code** of a Bill Item Note. Doing so will cause problems with any Bill Items currently using the Note.

To modify a Bill Item Note record:

- Locate the Note you wish to modify by following the procedures outlined in **Finding a Bill Item Note**.
- Type the changes you wish to make in the **Description** and/or **Note** box.
- Click **OK** to save your changes, or click **Cancel** to discard your changes.

Deleting Bill Item Notes

Typically, you will have no need to delete a Bill Item Note; an unused Note has no adverse effect on DVMAX.

⚠️ Deleting a Bill Item Note record can affect Bill Items linked to the Note, and leave other records in DVMAX incomplete. If you are unsure of the effects of deleting a Bill Item Note, leave the Note record intact.

Deleting a Single Bill Item Note

To delete a single Bill Item Note:

- Locate and open the Bill Item Note you wish to delete by following the procedure outlined in **Finding a Bill Item Note**.
- Click **Delete** at the bottom of the Bill Item Note dialog. DVMAX will ask you to confirm that you wish to delete this Note.
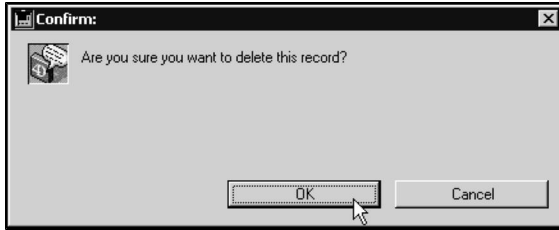
- Click **OK**. DVMAX will warn you that deleting this Note record may affect other parts of the system.

- If you are sure you wish to delete the Note, click **OK**. Otherwise, click **Cancel** to leave the Note record intact.

Deleting Multiple Bill Item Notes

To delete multiple Bill Item Notes, you must be viewing a list of Bill Item Note records from which you can then make a selection. To view a list of Bill Item Notes, follow the procedure outlined in **Finding a Bill Item Note** or **Viewing All Bill Item Notes**.

To delete multiple records from the Bill Item Note records list:

- From the records list, click to select the Bill Item Notes you wish to delete. Press the SHIFT key while clicking to select multiple adjacent lines. Press the CONTROL key (COMMAND on Macintosh) while clicking to select lines that are not adjacent.

- Choose **Delete Records** from the **Bill Item Notes** drop-down menu.

- DVMAX will ask you to confirm that you wish to proceed.

- Click **Delete**. DVMAX will warn you that the delete action is permanent.

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- If you are sure you wish to proceed, click **Delete**. Otherwise, click **Stop**.

Blood Analyzer Configuration

DVMAX works with a variety of in-house blood analyzers, providing the seamless integration of test results to your patient records. This chapter describes how to configure DVMAX to work with supported blood analyzers and provides vendor-specific setup procedures. For more information on working with analyzers and lab results, see the chapter **Integrations, Requisitions and Results**.

Supported Analyzers

You can configure DVMAX to work with any of the following analyzers:

- Abaxis Vetscan VS2, VetScan, VetScan HMT, VetScan + HMT, Abaxis HM5, Abaxsis VetScan HMTII
- Hemagen Analyst
- IDEXX VetTest, VetTest + VetCom, and VetTest + SnapReader
- Synermed
- Vet-ABC-Diff
- Heska Spotchem
- Heska CBC-Diff
- Heska Dry-Chem/Heska DCU
- HEMAVET
- IDEXX VetLab Station Serial
- IDEXX VetLab Station Network

Configuring Analyzers in DVMAX

To configure DVMAX to work with your analyzer:

- Choose **Preferences** from the **File** drop-down menu.
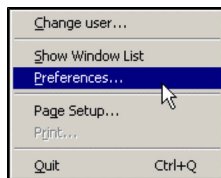
- The DVMAX Preferences dialog opens.
- Select the **Lab Result Setup** tab.
- Click the **Set Analyzer** button in the In-Office Analyzer section of the **Lab Results Setup** tab.
- From the **Analyzer** drop-down list, select your analyzer.

- Your analyzer is connected to DVMAX on a specific port. Click the **Port** drop-down list and select your port. If you do not know the port, please contact DVMAX technical support. The IDEXX VetLab Station Network will not require you to specify a port because it is networked.

⚠ If you use a Serial to Ethernet adapter you will need to specify an IP address in Advanced Settings. Please contact DVMAX Technical Support for assistance.

- Click **Select** to save your analyzer settings and return to the **Lab Results Setup** tab.

-OR-

- Click **Cancel** to return to the **Lab Results Setup** tab without changing your settings.

- Click **Start Analyzer** in the In-Office Analyzer section to start the analyzer.

- Click **OK** to close **Preferences** and save your settings.

IDEXX VetLab Station

DVMAX integrates easily with the IDEXX VetLab Station. The VetLab Station can be either Serial or Network. The IDEXX VetLab Station Network lets you manage requisitions (send, resubmit, edit or cancel requisitions) to the VetLab and automatically receive results, sent directly to the appropriate patient record.

To learn more about setting up lab requisitions for and working with lab results received from the VetLab Network, refer to the chapter **Integrations, Requisitions and Results**.

Configuring the IDEXX VetLab Station Network

You will need to specify a Practice Management Network Connection to use the VetLab Network Station.

- Connect the proper power cable to Dell PC

- Connect the monitor cable to Dell PC

- Connect the Lab Station mouse to Dell PC

- Connect the power supply to the Lab Station

- Connect the Lab Station to Dell PC with a USB cable

- Power on all machines.

- To enable DVMAX to work with the VetLab Station Network, you will need to make sure the VetLab Station Practice Management Network Connection is properly configured.

- If it is not already enabled, from the Practice Management tab, Practice Management Software area, select the **Other** radio button. Then select Network. Click **Configure** to specify the network settings. Select **Autoconfigure**, or to work from a specified IP, select Direct Connect and enter the IP address. Be sure to type DVMAX in the **Integration Name** field.

- Configure DVMAX to read data from the **VetLab Station Network**. See **Configuring Analyzers in DVMAX** for instructions. Note you will not need to select a port for the networked connection. When a connection has been made, an icon on the VetLab machine displays on the bottom of right the lab station screen with the message "Ready".

To learn more about setting up lab requisitions and working with lab results received from the VetLab Network, refer to the chapter **Integrations, Requisitions and Results**.

Configuring the IDEXX VetLab Station Serial

To configure the IDEXX VetLab Station Serial to work with DVMAX:

Step 1: Connect and Power On All Machines:

- Connect the proper power cable to Dell PC

- Connect the monitor cable to Dell PC

- Connect the Lab Station mouse to Dell PC

- Connect the power supply to the Lab Station

- Connect the Lab Station to Dell PC with a USB cable

- Power on all machines.

- Configure DVMAX to read data from the **VetLab Station Serial**. See **Configuring Analyzers in DVMAX** for instructions. When a connection has been made, an icon for the machine displays on the bottom of the lab station screen with the message "ready".

Step 2: Set Preferences on the Lab Station:

- Click the **Settings** button.

- Click the **Practice Management** tab.

- Click to select the **Other** radio button. **Serial** is selected by default.

- Click **OK.**

- Click the **Instruments** button.

- Click the **Practice Management** tab.

- Click the **On (Records Will be Transmitted)** radio button in the Transmit Records area of the screen.

- Click **OK.**

To run a sample on the IDEXX Lab Station:

- Insert Sample into the Lab Station.

- Click the **Sample** button on the instrument screen. The **Identify Sample** screen appears.

- Enter Client information (ID, Last Name, First Name, Requisition ID) on the **Identify Sample** screen.

- Enter Patient information (Name, Species) on the **Identify Sample** screen.

ⓘ Existing (previous) client information can be accessed by choosing a client ID from the **Client ID** drop-down list.

- On the Run Sample screen, select the **Lab Station/ProCyte/LaserCyte** checkbox under **Instruments to Run.**
- Click to select a **Reason for Testing**.
- Click **OK**.
- The Lab Station will start analysis – the machine will beep. When the sample is complete, a results screen will appear. You can you choose to print, view, change or delete results.
- Results will be automatically displayed in DVMAX and will be added to the Patient history.

You can configure DVMAX to read data from your analyzer. See **Configuring Analyzers in DVMAX** for instructions.

An illustrated tutorial on this topic is available under **Support** on the DVMAX website at www.dvmax.com.

Abaxis Vetscan VS2 Chemistry Analyzer

The Vetscan VS2 Chemistry Analyzer provides quantitative in-vitro determinations of clinical chemistry analytes in heparinized whole blood, heparinized plasma, or serum.

The Vetscan VS2 Chemistry Analyzer is equipped to transmit patient and control results in eight-bit, ASCII format to a computer through the USB serial port. To receive the results from the VS2, a computer requires terminal emulation software, such as HyperTerminal, which is included with Windows 95 and higher. The computer also requires driver software to communicate with the VS2. The driver software is available on the VS2's accompanying CD.

For more information, go to http://www.abaxis.com.

Setting up the VS2 Analyzer

To set up the VS2 analyzer:

- Turn on the computer, and insert the Abaxis Driver CD into the CD drive.
- DO NOT connect the analyzer to the computer yet.
- For PCs, run the Abaxis Driver Setup.exe in the Win2K_XP folder.
- For Macs, browse to the CD drive and run FTDIUSBSerialDriver_vX_X_X.dmg in the Mac\Intel folder for Intel-based Macs, or run FTDI-

USBSerialDriver_vX_X_X.dmg in the Mac\PPC folder for PowerPC-based Macs.

- Follow the installer instructions. Wait for the installer to complete. Click **OK**.

- Plug the power jack into the analyzer, and plug the detached power supply cord into the power adapter and into a grounded electrical outlet.

- Connect the USB cable to a Type A connector on the computer and to the upper-most USB connector (Type B) on the back of the analyzer.

- Turn on the analyzer. Wait for the computer to recognize the analyzer. This may take a few minutes.

- Press the power button to turn on the analyzer. A spiral image will be displayed.

- The analyzer goes through a warming up period. After passing the self-test and reaching operating temperature, the analyzer is ready to run the first reagent rotor, and displays "Analyze".

Configuring HEMAVET CDC Mascot

To configure the HEMAVET analyzer to work with DVMAX:

- Attach modem cable to the back of the machine, and to the computer.

- Attach the power cable to the machine.

- Turn on the power switch at the side of the machine.

To run a test on the CDC Mascot:

- The HEMAVET CDC Mascot has been set up with one file in memory for the purpose of re-transmitting data as an initial test. DO NOT press the Start key. This will run a cycle and the data will be lost.

To re-transmit data from the last sample run, on the analyzer keypad, press the following key sequence:

- 9 SPECL

- Then press 7 (Diagnostics)

- Press 3 (DMS)

- Press 1 (Initialize)

- Press 2 (Send)

You can configure DVMAX to read data from your analyzer. See **Configuring Analyzers in DVMAX** for instructions.

An illustrated tutorial on this topic is available under **Support** on the DVMAX website at www.dvmax.com.

Configuring the Abaxis HM5

Support has been added for the Abaxis HM5 blood cell count machine.

⚠ For configuration details, please contact DVMAX technical support. Error conditions do not get added to the graph, they only appear in the main result.

Configuring the Abaxis VetScan Chemistry System

The VetScan Chemistry System provides quantitative in vitro determinations of clinical chemistry analytes in heparinized whole blood, heparinized plasma, or serum.

To configure this device to work with DVMAX:

- Connect the analyzer and your computer with a Straight Through Cable.
- Configure your analyzer for auto-transmission. Press the **Recall** button on the unit's keypad.
- Press 1, then press **Enter**.
- Press 2, then press **Enter**.
- Choose **Results**, then press **Enter** to test your configuration.
- Test Results will appear on your computer screen.

You can configure DVMAX to read data from your analyzer. See **Configuring Analyzers in DVMAX** for instructions.

An illustrated tutorial on this topic is available under **Support** on the DVMAX website at www.dvmax.com.

Configuring the Abaxis VetScan HMT Hematology Analyzer

VetScan HMT Hematology is a fully automated system for complete blood count (CBC) of white blood cells, red blood cells, and platelets in whole blood in a veterinary setting.

To configure this device to work with DVMAX:

- Plug the device into an electrical outlet and turn on the power.
- Insert an HMT card into the slot on the side of the analyzer.
- Select your preferences. Press the **Menu** button on the front of the unit.
- Use the arrows on the front of the unit to select **SYSTEM** on the unit's screen.
- Press the **Enter** button on the front of the unit.
- Use the arrows on the front of the unit to select **COMMUNICATIONS** on the unit's screen.
- Press the **Enter** button on the front of the unit.
- Select a **Baud rate** of 9600.
- Select a **Data rate** of 8 bit.
- Set **Parity** to NONE.
- Set **Data Out** to NONE.
- Press the **Exit** button to return to the main menu.

- Insert the provided NULL modem cable (Serial Cable) into the Computer port (2nd from top) on the side of analyzer.

- Attach the other end of the cable to your computer.

You can configure DVMAX to read data from your analyzer. See **Configuring Analyzers in DVMAX** for instructions.

An illustrated tutorial on this topic is available under **Support** on the DVMAX website at www.dvmax.com.

To run a sample:

- Put the blood sample in the analyzer.

- Press the **Analysis** (Test Tube) button on the front of the analyzer.

- Enter patient codes.

- Press **Enter** to start the analysis.

- Press **Enter** to validate.

- When the analysis is complete, a printout will appear, and results will display on the monitor.

Configuring the Abaxis VetScan HMTII Hematology Analyzer

To configure this device to work with DVMAX:

- On the back of the analyzer, hook up all the appropriate hoses to the associated Hematology Reagent Pack. See HMII Owners manual.

- Attach null modem serial cable to the port labeled Serial on the analyzer, and then to the serial port on your computer. Contact DVMAX Technical Support for assistance on selecting a port if needed.

⚠️ If you use a Serial to Ethernet adapter you will need to specify an IP address in Advanced Settings. Please contact DVMAX Technical Support for assistance.

- Attach the power cable and plug it into the power outlet.

- Turn on power switch.

You can configure DVMAX to read data from your analyzer. See **Configuring Analyzers in DVMAX** for instructions.

An illustrated tutorial on this topic is available under **Support** on the DVMAX website at www.dvmax.com.

To run a test on the VetScan HMTII:

- Select the test tube button on the keypad at the front of the analyzer.

- Put a sample in the tray.

- Start analysis by selecting the Start button.

- Once the analysis has finished, the results will be displayed on the analyzer screen.

- The results will also be displayed in DVMAX.

Configuring the Hemagen Analyst

The Hemagen Analyst provides a profile, panel and single results in 10 minutes for Glucose, BUN, creatinine, BUN/creatinine ratio, uric acid, cholesterol, triglyceride, GOT, total bilirubin, Alkaline phosphatase, GPT, GGT, calcium, total protein and amylase.

⚠ For configuration details, please contact DVMAX Technical Support.

Configuring the Heska CBC Diff Veterinary Hematology System

To configure this device to work with DVMAX:

- Make sure the unit is powered down, and insert a serial cable into the back.

- Plug in the power cable. Turn on the power.

- Set your preferences. On the menu pad, press **Menu**. This brings up the main menu.

- Use the arrow keys to move down to item 5, "Setup Menu". Press the **Enter** button.

- Use the arrow keys to move down to item 5.10, "Setup menu 2". Press the **Enter** button.

- Use the arrow keys to move down to item 5.10.5, "Serial Port Setup ". Press the **Enter** button.

- Select the following options: Baud 9600, Parity = N, Databits = 8, Stopbits = 1, HW-handshake = y. Press the **Enter** button.

- Press **Main** to return to the main menu.

- On the main menu, set **autoprint mode** to **6**.

- On the main menu, set **print key function** to **6**.

- On the main menu, set **print format** to **18**.

You can configure DVMAX to read data from your analyzer. See **Configuring Analyzers in DVMAX** for instructions.

An illustrated tutorial on this topic is available under **Support** on the DVMAX website at www.dvmax.com.

Configuring the Heska Dri Chem (Heska DCU)

⚠️ For configuration details, please contact DVMAX Technical Support. Visit Heska product support online at http://www.heska.com/Products/Lab-Systems.aspx for more details on configuring this instrument..

Configuring the Heska Spotchem EZ Dry Chemistry System

To configure this device to work with DVMAX:

- Connect cable to analyzer and computer. The end of the cable that resembles a telephone jack plugs into the back of your Spotchem EZ analyzer. The opposite end (large silver block) attaches to the serial port on the back of your computer.

- Configure the analyzer. Ensure that the **Main Menu** on the analyzer displays "1, 2, 3".

- Press **MENU & STOP** together.

- At the password prompt, press the **-/.** key**.**

- Type in **4430**, and then press **-/.** again.

- Press **Enter.**

- Press the **2** key (**Submenu**), **6** key (**Setup**), and then the **3** key (**Communication**)

- Press **-/.** to toggle function to "ON", then press **ENTER**.

- Press **-/.** to toggle format to "1", then press **ENTER**.

- Press **-/.** to toggle Baud to "9600", then press **ENTER**.

- ID format is displayed. Press **ENTER**.

- When the menu reappears, press **STOP** several times to "Back to USER MODE?"

- Press the **START** button.

- The analyzer will do a brief initialization.

You can configure DVMAX to read data from your analyzer. See **Configuring Analyzers in DVMAX** for instructions.

An illustrated tutorial on this topic is available under **Support** on the DVMAX website at www.dvmax.com.

Configuring the IDEXX VetTest

To configure this device to work with DVMAX:

Step 1: Insert the software disk

- Make sure the analyzer is OFF

- Remove the disk cover at the back of the analyzer.

- Push the black button to eject any disk that may be in the drive.

- Insert software disk into drive.

- Replace cover to prevent inadvertent ejection of disk.

Step 2: Connect the serial cable to the computer

- To connect directly to the computer, use the serial cable marked IDEEX Vet-Test – D. To connect to the VetCom multiplexing Device, use the serial cable marked IDEEX VetTest – S

- Connect the appropriate serial cable to the serial port on the back of the analyzer, labeled RS232.

- Attach other end of cable into the computer for direct connections, or into the port labeled VetTest for connecting to the VetCom.

⚠ If you use a Serial to Ethernet adapter you will need to specify an IP address in Advanced Settings. Please contact DVMAX Technical Support for assistance.

Step 3: Turn on the power

- Insert the female end of the power cord into the back of the VetTest, in the port marked "Power."

- Plug the male end of the power cord into a wall outlet or power bar.

- Turn on the analyzer.

- The analyzer will run through a series of self-checking procedures, which last for two minutes. The analyzer will then begin its warm-up procedure to reach the correct operating temperature. This will normally take 25 minutes.

Step 4: Check settings

- After warm up, the main menu will appear.

- Select "5. Settings".

- Select "7. Data Transfer choices".

- Select "4. Transmission Control".

- The next screen will present you with "2. Disable Transmission" or "Enable Transmission". Make sure the option "2. Disable transmission" is visible. This actually means that "2. Enable Transmission" is currently selected.

You can configure DVMAX to read data from your analyzer. See **Configuring Analyzers in DVMAX** for instructions.

An illustrated tutorial on this topic is available under **Support** on the DVMAX website at www.dvmax.com.

To run a test sample

- Press 1 on the keypad to enter New Sample.

- Follow the prompts to enter patient information.

- Place pipettor tip in sample and press button. You will hear one (1) beep.

- When you hear two (2) beeps, remove pipettor from the sample.

- At three (3) beeps, wipe off tip.

- Examine the tip, and place the pipettor back in the analyzer. The rest of the testing occurs automatically.

Configuring the Vet ABC Hematology Analyzer

Step 1. Hook up cables

- Attach the power cord to the outlet in the back of the analyzer.

- Attach the printer cable to the back of the analyzer.

- Using a Keyspan cable adapter, connect the printer cable to your computer.

Step 2. Turn on analyzer

- Switch the analyzer on by pressing the ON/OFF (I/O) switch on the back of the analyzer.

- When first switched on, the analyzer goes into a warm-up period followed by an automatic STARTUP cycle. The STARTUP should be interrupted to make preference settings.

- To stop the STARTUP, hit the Esc button until you are given a new menu. Select Yes using the Enter button.

Step 3. Set analyzer preferences
By default, the analyzer will search for a printer. If this setting is not changed, an error will occur and the analyzer will be unable to send results to DVMAX. To change this setting, use the Up and Down arrow buttons from analyzer's main menu to:

- Select 5. Setup, then Enter

- In Setup menu select, 1. Results, then Enter

- In Results menu select, 4. Printer, then Enter

- In Printer menu select, 5. None, then Enter

- Hit ESC until you get back out to the Main Menu

Step 4. Setup DVMAX

- Launch DVMAX

- From the file menu, select preferences

- From the lab results tab select Set analyzer

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- Select analyzer: Vet ABC_Diff

- Select port to be used

- Select Start analysis

Step 5. Restart DVMAX
   To complete the setup, restart DVMAX.

You can configure DVMAX to read data from your analyzer. See **Configuring Analyzers in DVMAX** for instructions.

An illustrated tutorial on this topic is available under **Support** on the DVMAX website at www.dvmax.com.

Boarding

The DVMAX Boarding facility lets you schedule patients for boarding. The Boarding facility is a web-based interface, providing greater flexibility of the boarding functions. Boarding is typically used to reserve or "book" a cage for a patient for a term ranging from a few hours (such as following a surgical procedure) to several days (as with formal boarding of the pet if owner is away). You can schedule boarding from a patient record or directly from the Boarding facility.

You will need to set up the Boarding facility before you can use the Boarding functionality for the first time.

Setting Up Boarding: An Overview

Before you can use the Boarding facility for the first time, you need to specify Rooms and Cages within those rooms where animals can be boarded, as well as a few other details. Boarding **Setup** is found on the **Boarding** facility by clicking the **Setup** button in the top left corner of the Boarding window.

As a general overview, the steps you follow to set up boarding are listed below. Refer to the applicable section for more detail.

To set up Boarding:

- Open the Boarding facility by clicking the **Boarding** icon from the Command Palette or select **Boarding** from the **Section** drop-down menu.

- From Boarding select **Setup** in the top left corner of the Boarding window.

- From the **Setup** tabbed window, choose the **Settings** tab. This is the default display when you open Boarding **Setup**. Depending on your user configuration, you may not have access to the **Setup** functionality.

- Set the boarding label format for short-term (Events Under One Day) and longer-term (Events Over One Day) boarding appointments. This is the label that will show on any boarding or boarding reservations you schedule. The default is **Patient Name: Check In Time/Date, Check Out Time/Date**.

- In the **Options** area, set the default # **Days Forward** to display. This determines how many days forward from the current date will show in the Boarding grid in the standard **Days** view. The default value is 365 days, which allows you to view the next 365 days in the boarding schedule (using the horizontal scroll bar).

- In the **Options** area, set the default # **Days Back** to display. This determines how many days back from the current date will show in the Boarding grid in the standard **Days** view. The default value is 7 days, which allows you to view the previous 7 days in the boarding schedule (using the horizontal scroll bar).

- In the **Options** area, select the default status to display when a boarding is created.

- Select **Prompt for Boarding for In-Hospital Patients** if you wish DVMAX to prompt for boarding from a patient record when a patient status is changed in the record to "In Hospital".

- Define at least one Boarding Status type in the **Status Values** area. Examples of boarding values include **Reserved** or **Arrived**.

- From the **Setup** tabbed window, choose the **Rooms & Cages** tab.
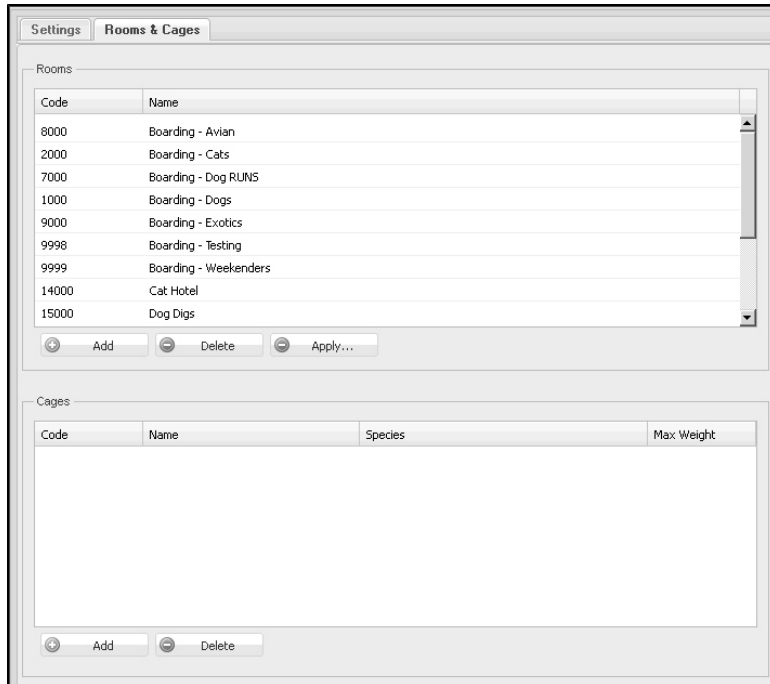
- Add at least one Room (see **Boarding Setup: Add a Ward or Room** for more information). A room or ward is a group name under which one or more cages can be added. Patients cannot be boarded in a room, only in cages linked to a room.

- Add Cages to a Room.

- Close the Boarding **Setup** window.

- The changes you make to boarding setup will be available to all workstations running DVMAX.

Boarding Setup: Settings

The Boarding **Settings** tab under **Setup** includes 3 main sections: **Event Format**, **Options** and **Status Values**. The **Event Values** area is where you set the boarding label format for short-term and longer-term boarding appointments.

In the **Options** area, you set the default Days to Display (Forward and Back), set the default status for new boarding appointments, determine if you want DVMAX to prompt for boarding for a patient with status "In-Hospital". Under the **Status Values** area, you need to define boarding Status types. These values are used when scheduling boarding and color code the boarding appointments so you can see at a glance what types of boarding appointments are scheduled, as well as the Check-In status of the boarding appointment.

Boarding Setup: Event Format (Boarding Label)

Set the boarding label format for short-term (Events Under One Day) and longer-term (Events Over One Day) boarding appointments. These are the labels that will show on any boarding or boarding reservations you schedule.

Events Under One Day are considered short term boarding appointments. The default label for these types of boarding appointments is **Patient Name: Check In Time, Check Out Time**. The boarding label on the Boarding grid will show a patient's name and the time of day they check in and check out. You can add or remove items from the label using the options shown on the lower part of the Events area. See **Boarding Appointment Label Options** for a description of the options.

Events Over One Day are considered long term boarding appointments. The default label is **Patient Name: Check In Date, Check Out Date**. The boarding label on the Boarding grid will show a patient's name and the date they check in and date check out. You can add or remove items from the label using the options shown on the lower part of the Events area. See **Boarding Appointment Label Options** for a description of the options.

Boarding Appointment Label Options

You can use any of the follow options in the boarding appointment (or event) label. Keep in mind that space is limited, especially on short term boarding appointments, so you may not be able to see the full label.

- Patient name – use the format {Patient}

- Client name – use the format {Client}

- Boarding start date - use the format {StartDate}

- Boarding start time - use the format {StartTime}

- Boarding end date - use the format {EndDate}

- Boarding end time - use the format {EndTime}

- Boarding status - use the format {Status}

To create a boarding label:

- From the label options listed above, select what items you want to appear in the boarding label. Keep in mind that depending on the length of the boarding and the Boarding grid display, you may have very limited space in the label.

- Using the format listed above, add any of the 7 label options. You may separate the label options with spaces (<SPACEBAR>), commas (",") or colons (":").

- The default labels are {Patient}: {StartTime}{EndTime} and {Patient}: {Start-Date}{EndDate}.

Boarding Setup: Default Days to Display

In the **Options** area, type a number of days in the # Days Forward and # Days Back fields, or use the Up/Down arrows beside the field to increase or decrease the default value. This determines how many days will show in the boarding grid in the standard **Days** view.

Boarding: Number of Days Forward

The default **# Days Forward** value is 365 days, which allows you to view the next 365 days, beginning with the current date, in the boarding schedule. A horizontal scroll bar will display in the bottom of your browser window if the number of days you select does not fit in the browser window.

⚠️ If **# Days Forward** is set to a large number, switching from **Days** view to another view, such as **Hours**, may prompt an alert from DVMAX that the date range displayed has been adjusted. This is because you may be requesting DVMAX display a very large number of cells in the boarding grid and that could take a significant amount of time to generate. For example, displaying 365 days of boarding data, broken down by hours (365days x 24hrs) for every cage in boarding could result in a massive boarding grid with hundreds of thousands of cells. If this happens, DVMAX will display a notice that the view user is trying to display is too complex and adjusts the date range to make the display work.

Boarding: Number of Days Back

The default **# Days Back** value is 7 days, which allows you to view the previous 7 days, beginning with the current date, in the boarding schedule. A horizontal scroll bar will display in the bottom of your browser window if the number of days you select does not fit in the browser window.

ℹ️ Remember that this setting will provide a default boarding display that does NOT begin with the current date. The leftmost column in Day View will be 7 days back from the current day. Keep this in mind when drawing in a boarding reservation so that you create the boarding for the correct date.

Boarding Setup: Default Status

From the **Default Status** drop down list, select the default status to display when a boarding is created. There are 3 pre-defined status values: Reserved, Arrived and Cancelled. Under the Status Values area of Boarding Setup -> Settings tab you can add, edit or delete status values.

Boarding Setup: Status Values

Boarding Status values define the status of a scheduled boarding appointment. You can assign a status to a new boarding type when you schedule the boarding. The status is associated with a selected color and icon (if defined) on the boarding grid so you can see at-a-glance the status of boarding appointments you have scheduled. For example, you could create a boarding status of **Reserved** that you can apply to upcoming boarding appointments, letting you know what cages are reserved and when. When a patient arrives for the boarding, you can change the status to **Arrived**, indicating that the cage is now occupied.

Status values are available from the **Status** drop-down menu when creating a new boarding appointment for a patient. If you do not define any status values, this field will not be visible.

To **add** Status Values:

- From the **Status Values** area, click **Add**.

- In the **Status** field, type a name for the status. For example, **Reserved**.

- In the **Text Color** field, select a text color for this boarding type from the **Text Color** drop-down menu.

- In the **Color** field, select a block or cell color for the boarding appointment type from the **Color** drop-down menu.

- In the **Icon** field, select an icon for this boarding type from the **Icon** drop-down menu. You can choose No Icon (no icon will display), Checkmark (a checkmark will display on the new boarding appointment), Cancel (an "X" icon will show on the new boarding appointment) or Exclamation Point (an exclamation mark. "!", will show on the new boarding appointment).

- Click **Update** to save the **Status Value**.

Boarding Setup: Prompt For In-Hospital Patients

If the **Prompt for Boarding for 'In Hospital' Patients"** checkbox is selected, the Boarding Cage dialog is displayed when assigning In-Hospital status to a patient from the patient record. If it is not checked then the Boarding Cage dialog is not displayed when "In-Hospital" status is added to a patient record.

Boarding Setup: Rooms & Cages

Before you can use the Boarding facility for the first time, you need to specify Rooms and Cages within those rooms where animals can be boarded.

Boarding Setup: Add a Room

A Room provides a group heading to which one or more cages can be assigned. It does not have to be an actual physical room. The Room designation allows you to group a set of cages for use by animals of a certain species, weight, or other criteria. For example, you may have a number of cages in your facility that are used specifically for small canines. You could create a Room named Small Dog Room and then define which cages in your facility are designated as part of that room.

⚠ Quotation marks are not permitted in Room and Cage names. If you use them, they will be stripped from the name when the Room or Cage name is saved.

Room and Cage Code Essentials

⚠ A Room must be given a **Code** number, and cages are assigned **Codes** that are associated with the **Room Code**. The Room and Cage codes must be in a specific format.

Room Codes: Rooms Codes must be numbered 1000-999000, where each Room Code has 3 trailing zeros. Start your numbering at room 1000, then 2000, 3000, 4000, 5000, etc.

Cage Codes: The Room to which Cages are linked can be easily identified because the Cage Code will begin with the same number as the Room Code. For example, all cage codes associated with Room Code 1000 would fall between 1001 and 1999; all cage codes linked to room code 2000 would fall between 2001 and 2999, etc.

Even if you do not have many rooms or cages, you need to use this Code format.
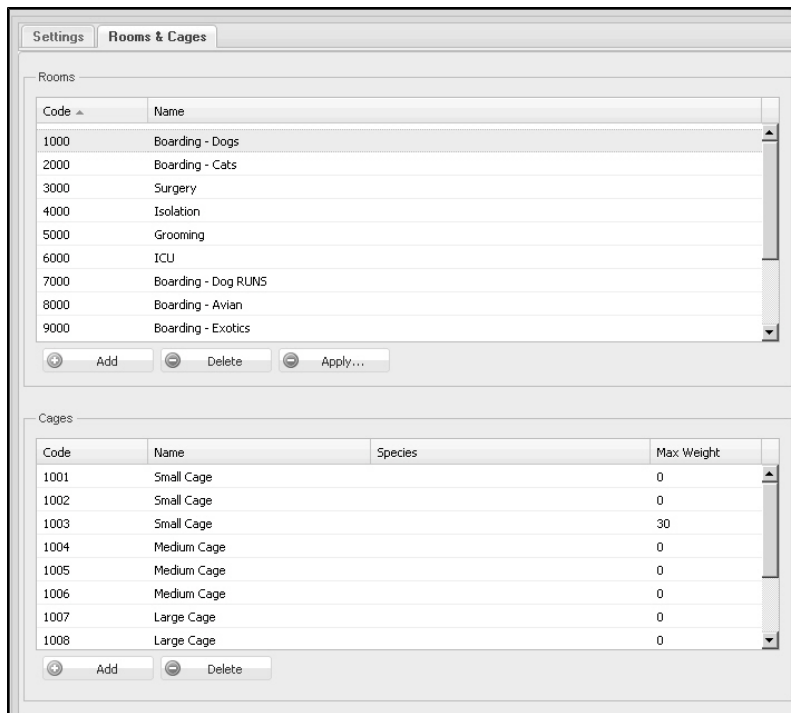
To Add a Room:

- Open the Boarding facility by clicking the **Boarding** icon from the Command Palette or select **Boarding** from the **Section** drop-down menu.

- From **Boarding** select **Setup** (the Tool icon) in the top left corner of the Boarding window.
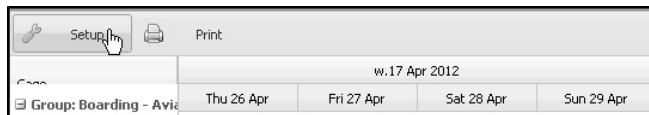
- From the **Setup** tabbed window, choose the **Rooms & Cages** tab.

- Under the Room(s) area in the Rooms & Cages window, click **Add.**

- In the Room Code field, type the Room Code using the format described under **Room and Cage Code Essentials**.

⚠ You must use the format as described under **Room and Cage Code Essentials**.

- Type a name for the room in the Room **Name** field.

- Click **Update** to save the Room. The room will appear in the Rooms drop-down menu when scheduling a new boarding.

ℹ The name you give to the Room can help you to select the most appropriate Room (and associated cage) in which to board an animal. Try to select a Room name that accurately reflects the species (and possibly size or weight) of animal you expect to house in that area. For example, the name Dog Ward indicates that this Room contains cages for canines.

View or Edit a Room

To view or edit a Room:

- From the **Rooms & Cages** window, double click a room name on the Rooms list.

- Make any changes, as needed.

- Click **Update** to save the changes to the Room.

Delete a Ward/Room

- From the **Rooms & Cages** window, click the room on the Rooms list that you want to delete.

- Click **Delete**.

- Click **OK** from the Confirm window to delete the Room.

ⓘ A Room cannot be deleted if it has associated Cages. You must delete the Cages first, moving or deleting any scheduled boarding for those cages, then you can delete the Room.

Boarding Setup: Add a Cage

To add a cage:

- Open the Boarding facility by clicking the **Boarding** icon from the Command Palette or select **Boarding** from the **Section** drop-down menu.

- From **Boarding** select **Setup** (the Tool icon) in the top left corner of the Boarding window.

- From the Setup tabbed window, choose the **Rooms & Cages** tab.

- On the **Room** list, click to select a Room group under which the cage will be created.

- If no cages have been defined for the selected Room, the **Cages** list area will be empty.

- If cages have already been created for that Room, the associated cage list will display in the **Cages** list area.

- To add a new cage to the selected Room, click **Add** under the Cages list area.
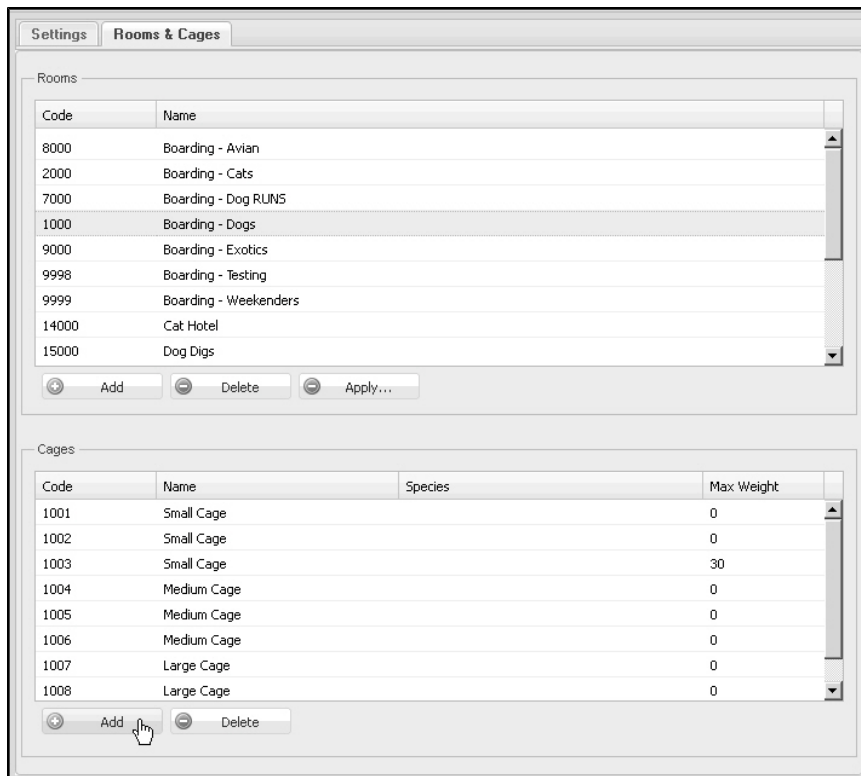
- Type a Code number for the Cage in the **Code** field using the format described under **Room and Cage Code Essentials**.

⚠️ **You must use the format as described under Room and Cage Code Essentials.**

- Type a name for the cage in the **Name** field.

- Type a number to determine the cage sort order in the **Order** field. The lower the number, the higher up in the default sort order the cage will appear.

- From the **Species** drop-down list, choose which species you want to allow to board in the selected cage. By default, all species are selected. If you wish to place restrictions on the species of animal that can be boarded in the cage, click to deselect each species you want removed from the allowed list. Those species marked with a bullet can be selected for boarding. Click to select and deselect any species on the list.

- In the **Max Weight** field type a maximum allowable weight (in lbs) for any animal boarded in the selected cage. Setting a maximum weight allows you to place restrictions on the size of animal that can be boarded in the cage. If you do not wish to set any restrictions on the cage, use the default **Max Weight** value of 0. This will allow an animal of any weight to be booked in the cage.

- Click **Update** to save the cage. The cage will appear in the Cages drop-down menu when scheduling a new boarding once the Room under which the cage is defined is selected.

- Continue the Add Cage process until all cages have been created.

The name you give to each cage can help you later when selecting the most appropriate cage in which to board an animal. Consider choosing Cage names that accurately reflect the species (and possibly size or weight) of the animals you expect to board in those cages. For example, the name Large Dog Cage indicates that this cage can house larger canines.

Quotation marks are not permitted in Room and Cage names. If you use them, they will be stripped from the name when the Room or Cage name is saved.

View or Edit a Cage

To view or edit a Cage:

- From the Rooms list, click to select the Room under which the Cage you want to view or edit is grouped.

- Under the Cages list area, double click on the cage you want to edit.

- Modify the cage details **as** needed.

- Click **Update** to save changes.

Delete a Cage

- From the Rooms list, click to select the Room under which the Cage you want to view or edit is grouped.

- Under the Cages list area, click on the cage you want to delete.

- Click **Delete**.

- Click **OK** from the Confirm window to delete.

⚠️ **If there is a current or scheduled boarding for the cage you are trying to delete, you will need to move the boarding to another cage before you can delete the selected cage.**

Opening the Boarding Facility

To open the Boarding window:

- From the **Section** drop-down menu, choose **Boarding**.
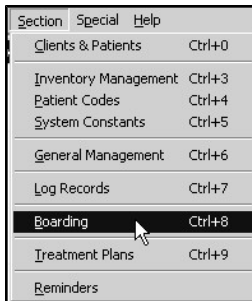
-OR-

- Click the **Boarding** icon on the Command Palette.

-OR-

- From the **Patient** drop-down menu in a patient record, choose **Set/Find Boarding**.

About the Boarding Window

The Boarding schedule is a grid, where columns are a time period (hours or days, depending on the view you have selected), and rows represent Room and associated Cages. Scheduled boarding shows in Cage rows only. For more information about the various sections of the Boarding schedule, see the related topics in this **Boarding** chapter.

Defining the Default Browser for Boarding

The default browser in which Boarding and Appointments opens is specified under **File -> Preferences** on the DVMAX main window. To set the default browser for Boarding:

- From the **File** menu on the DVMAX main window, choose **Preferences**.

- From **Preferences**, choose the **Assorted Prefs** tab.

- In the Appointment Scheduler/Boarding area, use the drop down menu to select the browser you would like DVMAX to use to open Boarding and Appointments. DVMAX uses your computer system's default browser as the default selection.

View a Room and Associated Cages

A room is defined in DVMAX as the group name under which there exists one or more associated cages. When scheduling a boarding, a patient is booked in to a cage within a selected room.

The default view displays the Boarding schedule with rooms and cages. Rooms and Cages are listed in the **Cage** column of the Boarding window. Rooms are indicated with a small box before the room name and the room name is in a bold font.

To hide cages associated with a room:

- Click the small box beside the room name to hide the cages associated with that room.

- To view cage rows, click the small box beside Room name again.

- If rooms are hidden, the small box will have a plus ("+") sign in the box. If the rooms are already displayed, the small box will have a minus ("-") sign in the box.

Color Coding on the Boarding Schedule

The Boarding schedule uses a color-coding scheme to assist you with reading cage availability, boarding status and the duration of boarding appointments.

Cages and Scheduled Boarding

Rows representing individual cages are white. Within these rows, a scheduled boarding appears as a colored bar that extends the length of the scheduled boarding, as defined by the display type on the boarding grid (Hours, Days, Weeks, etc.).

The length of the line represents the duration of the scheduled boarding. As with Appointments, the details on the scheduled boarding are defined under setup. See the **Boarding Setup** sections in this **Boarding** chapter for more information. Double click a scheduled boarding to view boarding details for that patient.

Room and Cage Availability Indicator

Current space availability in the cages associated with a room or ward is indicated by levels of grey shading. The deeper the shade of grey, the more full the cages.

Boarding Schedule Display Type

The Boarding schedule can be displayed using Hours, Days, Weeks or Months view. The default view is Days. The number of days displayed forward (ahead of the current date) and back (before the current date) is defined under Boarding **Setup**.

To change the view

- Click to select the display setting you prefer from the selection at the top of the Boarding window.

The view selection is:

- **Hours** – The **Hours** view displays the schedule of boarders over a 24 hour period.

- **Days** – The **Days** view displays the schedule of boarders over a set number of days. The default number of days forward, configured under Boarding Setup, is 365. The default number of days back is 7. You can change the default number of days under **Setup**, or use the **Start Date** and **End Date** calendars at the top of the Boarding window to adjust the selection.

- **Weekly** – The **Weeks** view displays the schedule for a 6-week period from the current week.

- **Months**– The **Months** view displays the schedule for a 12-month period from the current month.

⚠ Switching from one view to another view, such as from **Days** to **Hours**, may prompt an alert from DVMAX that the date range displayed has been adjusted. This is because you may be requesting DVMAX display a very large number of cells in the boarding grid and that could take a significant amount of time to generate. For example, displaying 365 days of boarding data (the default number of days forward displayed. See **Boarding Setup** for more on this setting.), broken down by hours (365days x 24hrs) for every cage in boarding could result in a massive boarding grid with hundreds of thousands of cells. If this happens, DVMAX will display a notice that the view user is trying to display is too complex and adjusts the date range to make the display work.

Print Boarding

DVMAX allows you to print 3 different boarding options from the Boarding Scheduler:

1. **Check In** - A report of all patients checking in on a specified date.

2. **Check Out** – A report of all patients checking out on a specified date

3. **Is Boarding** – A report of all patients in boarding on a specified date.

To print a boarding:

- From the Boarding schedule window, click the **Print** icon found in the top left corner of the window.

- Select **Check In**, **Check Out** or **Is Boarding**, depending on the report you wish to print.

- Type a start date and end date in the **Date** fields, or select a date range using the Calendar icons.

- Click **OK** to print.

See also **Boarding Reports**.

Add New Boarding

You can add a new boarding from a patient record or directly from the Boarding window. The following is an overview of the steps involved in scheduling a new boarding. See the related topics in this section for more information on a particular step.

Add Boarding from a Patient Record (Set/Find Boarding)

To add a new boarding from a patient record:

- Open the record for the patient for whom you wish to schedule boarding.

- From the **Patient** drop-down menu, click **Set/Find Boarding**.

- The Boarding scheduler opens. From the Boarding window, click and drag across the area where you would like to schedule the new boarding. This means you need to find the Room and Cage area where you want to place the boarding as well as finding the appropriate date for the boarding.

- The Boarding detail dialog opens. The patient name will be pre-filled. The date range will correspond to the date(s) in which you created the record using the click and drag motion. The date range can be manually adjusted using the **Check In** and **Check Out** fields. Complete any other boarding details as needed.

Add Boarding from the Boarding Scheduler

You can either create the new boarding appointment by using the click and drag method, or you can open the Boarding Detail dialog and edit the details to create the boarding record.

To add new boarding from the Boarding window using click and drag:

- From the Boarding window, click and drag across the area where you would like to schedule the new boarding. This means you need to find the Room and Cage area where you want to place the boarding as well as finding the appropriate date for the boarding.

- From the Boarding details dialog, select the patient for which you want to schedule the boarding. The patients list will only display if you are adding boarding directly from the boarding window. If you add boarding from a Patient record, the patient and client details will display automatically in the Boarding detail window.

- Note that only patients whose species type and weight is allowed to be boarded in the selected cage will be listed in the Patients list area of the Boarding details dialog.

- Use the Patient and Client filters at the top of the Boarding detail window to find the Patient for which you would like to schedule boarding.

- Complete the boarding details as needed.

To add a new boarding appointment from the Boarding Detail dialog:

ℹ️ If you try to add boarding for a patient marked as Deceased, you will get a message alerting you to this.

- You will need to click and drag on any open space on the Boarding scheduler to open the Boarding dialog. Remember that only patients whose species type and weight is allowed to be boarded in the selected cage will be listed in the Patients list area of the Boarding details dialog.

- In the Client and Patient area, select the patient for which you would like to schedule the boarding.

- If desired, select a status type for this boarding. Status types are defined under Setup.

- From the **Boarding** dialog select a **Check In** date and time.

- Select a **Check Out** date and time.

- Select a **Room** and **Cage** from the drop-down lists.

- If the patient record shows the patient is hospitalized, the **In Hospital** box should be marked. If needed, select **In Hospital**. Click **Reason** to type or view the reason for hospitalization.

- Click **Add Comments** to type any additional notes about the selected patient, as needed.

- Click **OK** to schedule the boarding and return to the main Boarding window. The new boarding will show on the schedule under the room and cage you selected.

AutoBook from the Boarding Scheduler

AutoBook is a time saving feature that allows busy boarding facilities to quickly find and book boarding times within a packed boarding schedule. The **AutoBook** feature identifies open cage times for a specified time period by species and cage size.

To add a new boarding using the **AutoBook** feature:

- Open the Boarding Scheduler.

- Click **AutoBook**. The **AutoBook** button is located under the tab bar next to the **Print** button.
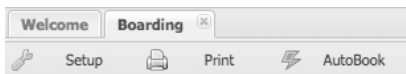
- The AutoBook dialog displays.
- Identify desired **Check In** and **CheckOut** times and dates.

- Select the **Room/Ward** to identify species and boarding requirements.

Note: the default Room/Ward value is for Avian boarding. The booking will not proceed if the booked patient is not an Avian within the default size restrictions.

- The Boarding window displays. Select a patient from the Patient menu.
- Make any edits required and click **OK** to schedule the boarding and return to the main Boarding window.
- The new boarding will show on the schedule in an available open cage within the room selected and for the date/time specified.

Setting the Status Type for Boarding

Boarding Status values provide a quick means of determining the status of boarding appointments you have scheduled. You can assign a status to a new boarding type when you schedule the boarding. The status is associated with a specified color on the boarding grid so you can see at-a-glance what types of boarding appointments you have at your facility. For example, you could create a boarding status of **Reserved** that you can apply to upcoming boarding appointments, letting you know what cages are reserved and when.

To set a status for a new boarding:

- From the Boarding Detail dialog, select a status from the **Status** drop-down menu. This status will affect the color, font color and icon (if any) displayed on the boarding grid for this boarding appointment.
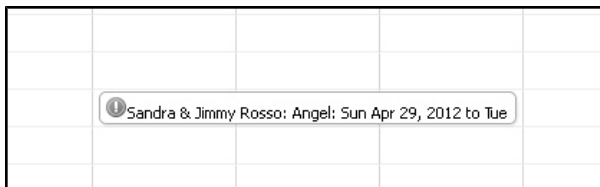
Setting the Check In and Check Out Date and Time

Check In is the date and time at which you expect the patient to be admitted to boarding (when the selected cage will be occupied). **Check Out** is the date and time when the patient is scheduled to be "picked up", or when boarding ends. The **Check In** and **Check Out** time will define the duration of the boarding, and will be indicated by green and red markers respectively on the Boarding window.

To set the Check In and Check Out date and time:

- From the Boarding Detail dialog, type a **Check In** date or click the Calendar icon and select a date. The default setting is the current date.

- Select a **Check In** time from the drop-down menu or type a **Check In** time (HH:MM), using a 12-hour clock, and type **AM** or **PM**. The default time is defined under Setup. See **Boarding Setup** for more on this default value.

- Type a **Check Out** date or click the Calendar icon and select a date.

- Select a **Check Out** time from the drop-down menu or type a **Check Out** time (HH:MM), using a 12-hour clock, and type **AM** or **PM**. The default time is defined under Setup. See **Boarding Setup** for more on this default value.

- If you typed a **Check In** and **Check Out** date, the Total Duration of the boarding, in days, will be calculated automatically.

- If you prefer, you can type a **Check In** date, then type a duration in days in the **Duration** field. The **Check Out** date will be automatically updated. You will still need to modify the **Check Out** time, if different than the default time.

Selecting a Room and Cage

To schedule boarding, you need to select a cage in which the patient is to be boarded. This involves selecting an appropriate room or ward, then choosing a cage from within that room. (See also, **Boarding Setup: Rooms and Cages** for more information).

Species and weight restrictions can be placed on cages under Cage Setup. Therefore, only those cages suited to the species and weight of the animal will be available as options.

To select a room and cage:

- From the **Room** drop-down list, select a room. The Room is the name under which a set of cages has been grouped.

- Select a cage from the **Cage** drop-down list. By default, only **Open Cages** (those not already booked for the selected dates) are shown. To display a list of all cages associated with a room, even those which may already be occupied or booked, choose **All Cages**. Any species and weight restrictions on cages (as defined under Cage Setup) will still limit the cage options displayed.

Boarding: Patient "In Hospital" Status

If the animal for which you are scheduling boarding is currently in hospital, this should be indicated on the **Status** field on the patient record. In that case, the **In Hospital** status should also be indicated on the Boarding detail window.

To mark the patient as **In Hospital** from the Boarding window:

- On the Boarding detail window, select **In Hospital**. Click again to deselect.

- Type a reason for hospitalization in the text area as needed.

Additional Comments

To make any additional boarding notes for the selected patient:

- Type comments in the **Comments** field of the Boarding detail window.

View or Edit Existing Boarding Appointment

You can choose to view or edit scheduled boarding through either the **Patient** menu (from a patient record), through the **Section** menu, or by selecting the **Boarding** icon.

To view or edit the details of a scheduled boarding:

- From the **Section** drop-down menu, click **Boarding**.

-OR-

- Select the **Boarding** icon from the Command Palette.

-OR-

- Choose **Set/Find Boarding** from the **Patient** menu in a patient record.

- From the Boarding window, double click on the scheduled boarding you want to view or edit.

- This opens a Boarding detail window, the same window as seen when adding a new boarding.

- From the Boarding window, make any necessary changes to the existing schedule. See related topics under **Add New Boarding** for more detail on modifying areas of the Boarding For detail window.

- Click **OK**.

Adjusting Boarding Duration

You can adjust the duration of a scheduled boarding as follows:

- From the Boarding window, double click on the scheduled boarding you wish to modify.

- Then, from the Boarding detail window, change the **Check In** and/or **Check Out** date or time.

-OR-

- Drag the beginning or the end of the scheduled boarding to make the duration longer or shorter.

Delete Boarding

To delete a scheduled boarding:

- From the Boarding window, double click on the boarding you want to delete.

- From the Boarding detail window, click **Delete**.

- Click **OK** from the Confirm window to delete the boarding record.

ⓘ You cannot delete a boarding until it has actually been scheduled. Therefore, while you are adding a new boarding, the **Delete** button will be unavailable.

Go To Record: Open a Patient Record from Boarding

You can open the patient record associated with a scheduled boarding directly from the Boarding Scheduler. To open a patient record:

- From Boarding, right click on the boarding appointment associated with the patient record you want to view. A pop up menu displays

- Select **Go To Record** from the pop up menu. The associated patient record will open.

- Note that DVMAX must be running (not just the Boarding and Appointments schedulers) in order for the associated patient record to open.

Print Boarding and Boarding Reports

There are a variety of ways to print boarding information and Boarding reports. Four reports can be printed directly from the Boarding display. The fifth, the custom Boarding Report, is run from

General Management in DVMAX.

DVMAX allows you to print 4 different boarding options from the Boarding Scheduler:

Boarding Schedule by Staff (Internal Scheduler Only)

You can print a copy of the boarding schedule by staff by clicking the Print button located on the bottom left of the Boarding schedule. Note that this report is only available when you are viewing the boarding schedule from an internal window. If you have DVMAX configured to open the schedule in an external browser, you will not see the Print button in the lower left corner of the browser window.

To print boarding by staff:

- Click **Print** from the lower left corner of the Boarding window.
- Identify the **Start** and **End** range for the report.
- Select the staff on which to report. By default, all staff are select.
- Click **OK** to print the report.

Check In Report

The Check In report provides a report of all patients checking in on a specified date or date range.

To print the Check Out report:

- Click **Print** from the top left corner of the Boarding window, beside the **Setup** button.
- Identify the **Start** and **End** range for the report.
- Click **OK** to print the report.

Check Out

The Check Out report provides a report of all patients checking out on a specified date or date range.

To print the Check Out report:

- Click **Print** from the top left corner of the Boarding window, beside the **Setup** button.
- Identify the **Start** and **End** range for the report.
- Click **OK** to print the report.

Is Boarding Report

The Is Boarding report provides a report of all patients in boarding on a specified date or date range.

To print the Is Boarding report:

- Click **Print** from the top left corner of the Boarding window, beside the **Setup** button.

- Identify the **Start** and **End** range for the report.
- Click **OK** to print the report.

Running Check In, Check Out and Is Boarding Reports

To print the **Check In**, **Check Out** or **Is Boarding** report:

- From the Boarding schedule window, click the **Print** icon in the top left corner of the boarding window.
- Select **Check In**, **Check Out** or **Is Boarding**, depending on the report you wish to print.
- Type a start date and end date in the **Date** fields, or select a date range using the Calendar icons.
- Click **OK** to print.

Boarding Custom Report

The Boarding custom report shows all patients boarded within the user-specified date range. The report provides patient signalment and client address information. To run this report:

- From the DVMAX main window, select **General Management** from the **Section** menu.
- Choose the **Reports** tab from **General Management**.
- From the **Custom Reports** area, select **Boarding Report**.
- Type a start date and end date for the reporting period and click **Generate Report**.

Breed Records

Breed records allow you to standardize the way you classify your patients in DVMAX. Setting up Breed records properly allows DVMAX to make certain breed-specific adjustments to a patient's record.

Breed records require a corresponding species record in order to be set up correctly. See **Species Records** for more information.

Creating a New Breed Record

To create a new Breed record in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu.
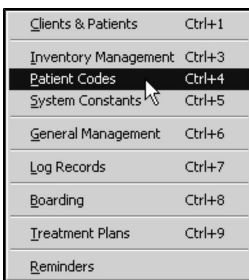
- The **Find** window displays.
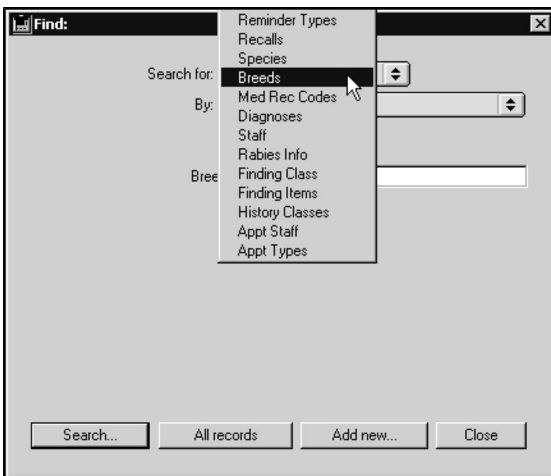
- From the **Find** dialog, choose **Breed** from the **Search For** drop-down list.
- Click **Add New**.
- A **New Breed Record** dialog displays.
- Type a unique code for the Breed record in the **Breed Code** field. Breed Code can be up to 20 characters in length.
- Type a name for the breed in the **Breed Name** field. See **Breed Names and January Aging** for information on naming conventions that can affect Thoroughbred Aging.

- Type the species name in the **Species Name** field, or click the magnifying glass to the right of the field and select a species from the list of species records.
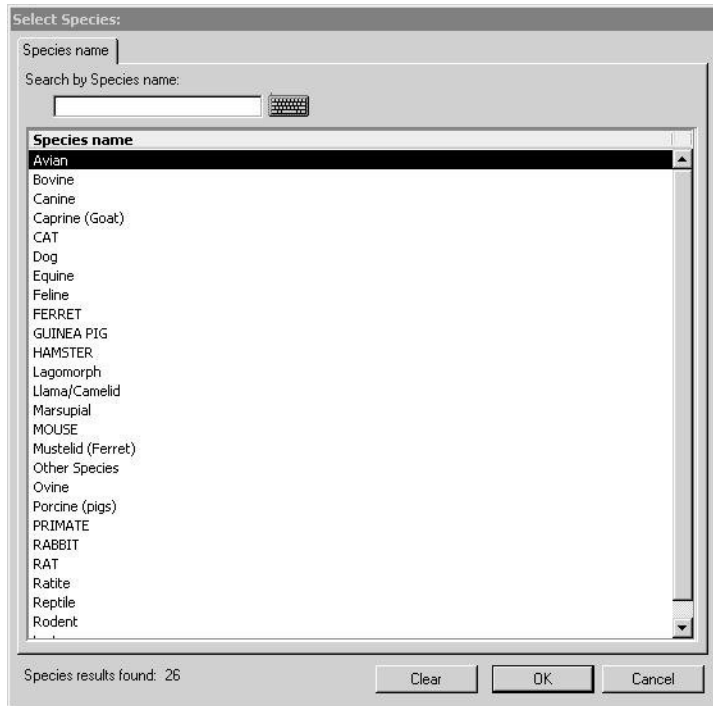
- To see a list of Species Names, click in the Species Name field, type the first letter and press <**TAB**>. This will bring up a window listing all existing codes.

- Click to select the **Aging** checkbox if you wish DVMAX to calculate ages for this breed with January or Thoroughbred aging. The species must be Equine for this setting to have any effect. See **Species Names and Sex Nomenclature** in **Species** and **Breed Names and January Aging** for more details.

- Click **OK** to save the Breed record.

Searching For Breed Records

To find a Breed record in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu.
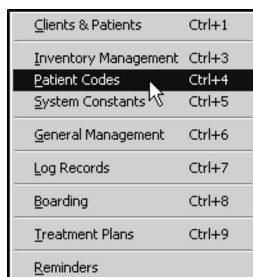
- The **Find** dialog displays.
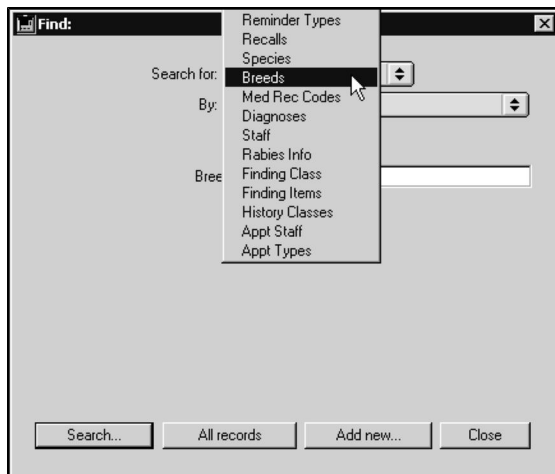
- Choose **Breed** from the **Search For** drop-down list.
- Choose **Breed Code** from the **By** drop-down list to search Breed records by code.

-OR-

- Choose **Keyword in Breed** to find any Breed records by breed name.
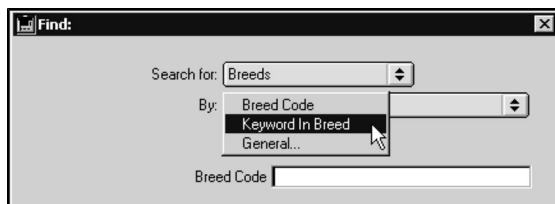
- Type a Breed code or name into the field below the **By** drop-down list. If you are searching by code, you must type at least the first few letters of the breed code. If you are searching by name, DVMAX will find all breeds that contain the word you type.
- Click **Search**.
- If there is more than one match for your search, the Breed List window will present a list of all items that matched your search.
- If there is only one Breed Record that matches your criteria, DVMAX will open that Breed Record.
- If there are no matches, DVMAX will display a message to that effect and return you to the **Find** window. Try your search again with different criteria, or display a list of all breed records and select from the list.

List All Breed Records

To list all Breed records defined in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu.
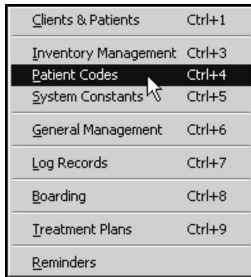
- The **Find** dialog displays.
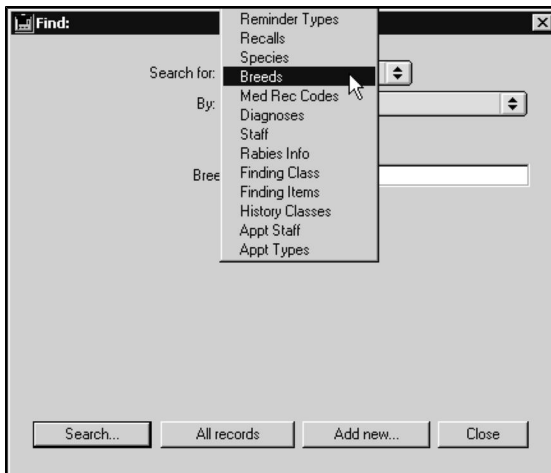
- Choose **Breeds** from the **Search For** drop-down list.
- Click **All Records** at the bottom of the **Find** window. A list of all defined Breeds displays.
- Each Breed record is listed on an individual line, with columns for Breed Name, Breed Code, and Breed Species.

Deleting a Breed Record

To delete a single Breed record from DVMAX:

- Find and open the Breed record you wish to delete. See **Searching for Breed Records.**

- Click **Delete**.

- DVMAX will ask you to confirm that you want to delete the Breed record

- Click **OK**.

To delete multiple Breeds from DVMAX:

- List all Breed record (see **Listing All Breed Records**).

- Click to select the Breed record you wish to delete.

- Choose **Delete Records** from the **Breed** menu.

- DVMAX will ask you to confirm that you want to delete the Breed records.
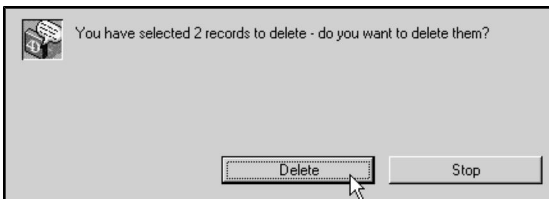
- Click **Delete**.

Breed Code Names: Conventions and Recommendations

As you continue to use DVMAX, you will need to add new breed codes. It is important not to duplicate breed names. We recommend that you follow these conventions when creating new breed codes:

- Breed Codes should be made up of letters or numbers. They must not contain spaces.

- If the full breed name is 10 letters or less, use it as the breed code.

- If the full breed name is longer than 10 characters, combine the first 3 letters from each word in the breed name to make a breed code. For example, "Boston Terrier" would be coded "BosTer".

- If you are creating a code for a new breed mix, place the word "mix" (or the characters "mx") at the end of the breed code you create. An example would be "Labcolliemx".

Breed Names and January (Thoroughbred) Aging

DVMAX will calculate an animal's age using Thoroughbred aging if two conditions are met on a patient record:

- The species name includes the word "Equine"

-AND-

- The breed code for the patient contains the letters "TBA", for "Thoroughbred Aging".

If these two conditions are met, then the age of the patient will be calculated as if the animal were born on January 1st. For instance, a breed code of QH for Quarter Horse would calculate the age based on the date of birth, while a breed code of QHtba would calculate the age based on Thoroughbred Aging.

For more information on this see **Species Records** and **Working with Patient Records**.

Client Records

Much of your time in DVMAX will be spent working with Client records. A Client is a customer of your practice or clinic. A Client Record contains all information about a particular client.

Through the Client screen you can access client and patient information and enter financial transactions such as invoices and payments. You can also write directly to your clients using DVMAX's built-in word processor.

As well, you can create invoices, estimates and returns from the client record. For more information on these topics, see the **Invoices**, **Estimates** and **Returns** sections of the Clients chapter.

An Overview of the Client Record

The Client record has three tabs, the **General Information** tab, the **Finances** tab and the **Word Processing** tab.

- The **General Information** tab shows basic client data, such as the client's name, address, account information and a list of all patients that belong to the client.

- The **Finances** tab shows past financial transactions, unfinished invoices and financial settings for the client.

- The **Word Processing** tab displays the word processing area for the client.

You can switch between these screens by clicking the appropriate tab near the top of the client window.
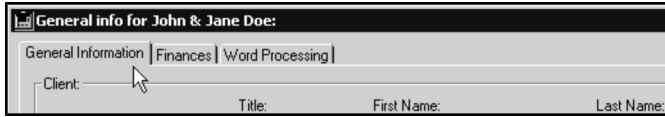
It is not necessary to click **OK** or **Cancel** before switching screens.

Searching for Client Records

To find a Client record in DVMAX:

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

   -OR-
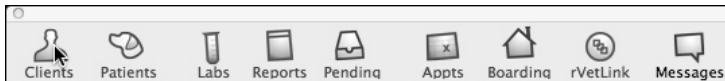
- Choose **Clients & Patients** from the **Section** drop-down menu.
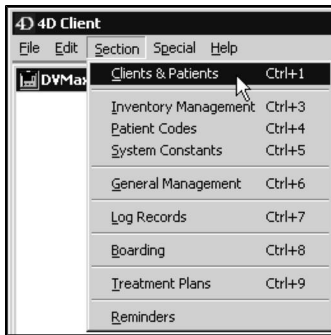
- The **Find** dialog opens.

- Choose a criterion from the **By** drop-down list. See **Search Criteria** for more information.
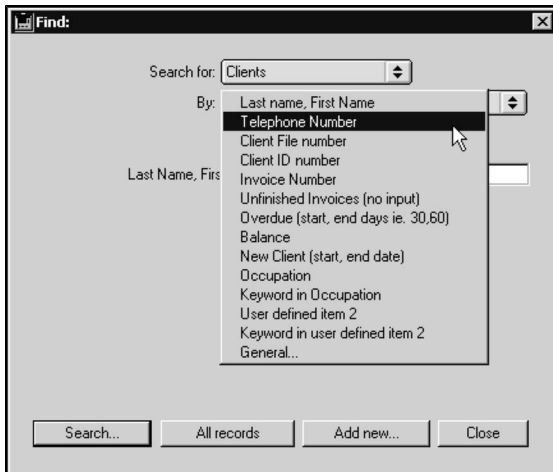
- If necessary, type an appropriate search term into the field below the **By** drop-down list. See **Search Criteria** for more information on appropriate search terms. The label of this field is determined by your choice from the **By** drop-down list.

- If your practice has multiple sites, choose a site from the **Site** drop-down list.

- Click **Search.**

- If there is more than one match for your search, a **Client List** will display, containing a list of records that matched your search.

- The first column of the **Client List** displays either the Client ID number or the Client File number.

ℹ️ Whether the Client ID or File number is displayed is controlled in the Clients & Patients Settings section of **System Constants**.

- DVMAX also displays the client's name, address and home phone number. You can sort the list either by Client number or Client name.

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

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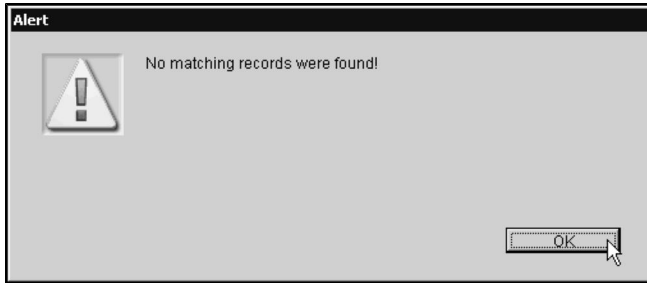
Search for Client Records

DVMAX provides a number of predefined ways to search for Client records. A description of each follows.

To find a Client record in DVMAX:

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

- From the **Find** dialog, choose a criterion from the **By** drop-down list.

- If necessary, type requested details in the field provided.

- Click **Search.**

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

- If there is only one record that matches your criteria, that Client record will open.

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

Client Record Search Criteria

DVMAX provides several predefined ways to search for Client records. A description of each follows. You can also choose to use the General Search option and define your own search criteria. See the **General Searches** chapter for more information.

Search for Client Records by Last Name, First Name

To conduct a simple search based on name:

- Type the last name, a comma and the first name. DVMAX will check both first and last names on the Client Record for a match. For example, if you wanted to search for "James Madison" you could enter "Madison, James".

- DVMAX will search the first and last name of both **Name 1** and **Name 2** on the Client record, if applicable.

- DVMAX will also search for partial matches based on how the name starts. For example, you could enter "Mad, J" to find all clients whose last name begins with "Mad", and whose first name begins with "J". This search would find "James Madison", and would also find "John Madden".

- You can leave out the first name and simply enter "Madison" to find all clients whose last names are "Madison".

ℹ Searches are not case-sensitive. "James Madison" and "james madison" are the same names. You do not need to capitalize your entries when searching.

Search for Client Records by Telephone Number

The Telephone number search uses the phone number provided in the first Phone field to locate the Client record. It uses the 7 digits of that phone number (it does not use the area code) but can sometimes search on the last four digits. You do not need to enter any dashes. DVMAX will find only exact matches with a Telephone number search.

Search for Client Records by Client File Number

The Client File Number search uses the File Number to locate a Client record. This search will find a client only if the File number matches exactly.

For more information on File Numbers, see **Client File Numbers.**

Search for Client Records by Client ID Number

The Client ID Number search uses the ID Number to locate a Client record. This search will find a client only if the ID number matches exactly.

For more information on ID Numbers, see **Client File Numbers.**

Search for Client Records by Invoice Number

The Invoice Number search finds a Client record based on an Invoice number. If the invoice has not been deleted, DVMAX will find the invoice and the associated client record.

Search for Client Records by Unfinished Invoices (No Input)

The Unfinished Invoices search finds all Clients with unfinished invoices. Typically, these are clients who have patients in the hospital for treatment. You do not enter any information for this search.

Search for Client Records with Overdue Balances

The Overdue search finds all Clients with overdue balances aged between the specified days. For example, entering "90, 120" will find all clients who have a balance that is more than 90 days old and less than 120 days old. This search is useful for generating notices and correspondence to slow-paying clients.

Search for New Client Records

The New Client search finds all new Client records created between the specified dates. By default, the first and last days of the previous month are entered when you choose this type of search. You can edit these dates as required. The New Client search is useful for tracking new clients and referral sources.

Search for Client Records with a Balance

The Balance Search finds all clients with a balance within the range you specify. You can further narrow your search by specifying a date range within which the client must have last visited your clinic. In Multi-Practice Access environments you can constrain by site.

To specify criteria for a Balance Search:

- In the **Balance Range** field, type a range of numbers into which client's balance must fall. For example, to find all clients with a balance between $50 and $100, inclusive, you would type 50,100.

- In the **Last Visit Date Range** field, type a range of dates in which the client's last visit must have occurred. For example, to see only clients who visited the clinic in June of 2016, you would type 06/01/2016, 06/30/2016.

- To limit the search by site, choose a site from the Site drop-down list.

Search for Client Records via User Defined Items

This search allows you to find Clients based on the contents of a User Defined Item. For example, if you keep clients' drivers license numbers in user-defined item #1 you can enter a license number to find a client.

⚠️ If you have defined a label for this user defined item, then the search menu will list the "label" you defined for this field rather than "User defined item 1". For example, if you defined the label for user defined item #1 to be "Drivers License #", then the search menu will read "Drivers License #".

For more information, see **User-Defined Fields.**

Search for Client Records with Keyword in User Defined Items

This search allows you to find Clients based on a word, phrase or code stored in a user-defined Item.

This makes it possible for you to use the user-defined item to store information to classify your clients. For example, you may want to note which clients are breeders, trainers or sitters for animals. You can do this easily by entering the appropriate word in User Defined Item 2 for each client. Then you can use this keyword search to find all of your "sitter" clients.

For more information, see **User-Defined Fields.**

Search for Client Records Using General Query

This search allows you to query based on any field that is part of the Client Record. For more information, see **General Searches**.

Listing All Clients

To list all clients in DVMAX:

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

   -OR-

- Choose **Clients & Patients** from the **Section** drop-down menu.
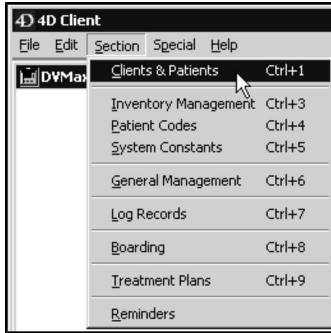
- The **Find** dialog opens.
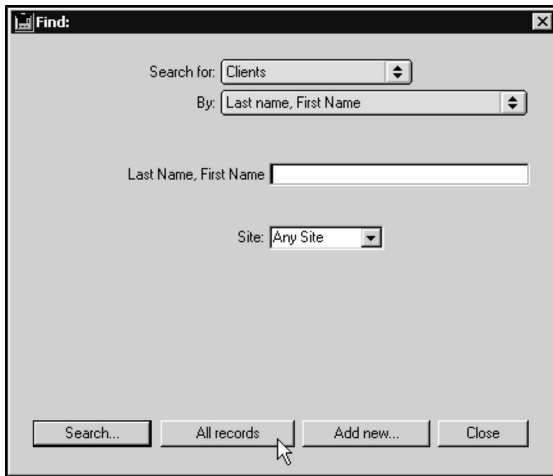
- Click **All Records** at the bottom of the **Find** dialog**.**

Creating a New Client Record

When you create a new Client record, DVMAX will automatically assign it a unique client ID number. This means that you do not need to worry if two or more clients share the same name, telephone number or any other information.

ⓘ If you are going to enter many client records in one sitting, you will want to enable the **Quicker Client Entry** in **System Constants**. For more information, see the entry in **System Constants That Affect the Client Record**.

To create a new Client record in DVMAX:

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

-OR-

- Choose **Clients & Patients** from the **Section** drop-down menu.
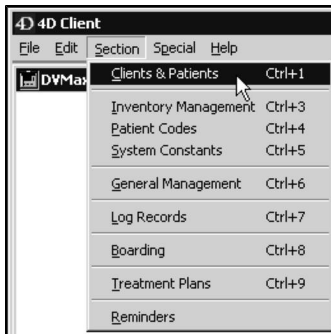
- The **Find** dialog opens.
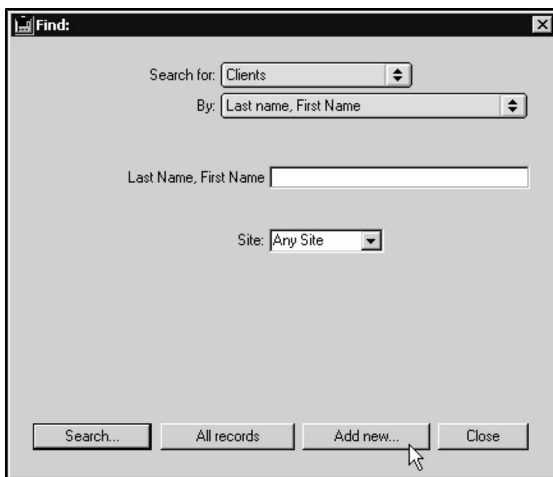
- Click **Add New** at the bottom of the Find dialog.

ℹ You will also find an **Add New** button at the bottom of the list of clients resulting from a Client search. For more information about Client searches, see **Searching for a Client**.

- DVMAX opens a new Client record, showing the **General Information** tab.
- Type the client's name, contact information any relevant notes, and add any patients this client owns. See the sections below for more detail. You can add to or alter most client information at any time.
- Click **OK** to save the new Client record and return to the Find window, or click **OK & Next Client** to create another Client record.

Enter a Client Name on a Client Record

To create a Client record, you must at least fill in the first **Last Name** field in the **Name 1** line.

A Client record can contain two names (**Name 1**, **Name 2**). Many will only need one. Each name is divided into three fields - **Title**, **First Name**, **Last Name**.

ℹ If your client is a business, enter the business name in the **Last Name** field for Name 1. Leave the **Title** and **First Name** fields in Name 1 empty. Enter the name of a contact person in Name 2. This allows you to search for this client either by company name or by the contact person's name.

To fill out the Client Name fields:

- Type the title, first name and last name of the first person associated with this client record into the appropriate fields beside the Name 1 button. Use the TAB key to move between the fields.

- If necessary, type the title, first name and last name of the second person associated with this client record into the appropriate fields beside the Name 2 button. DVMAX will automatically enter the last name from Name 1. You can type over this name.

ℹ️ Clicking either the Name 1 or Name 2 button will show you a list of pre-defined titles. Selecting a title from this list will insert it into the **Title** field.
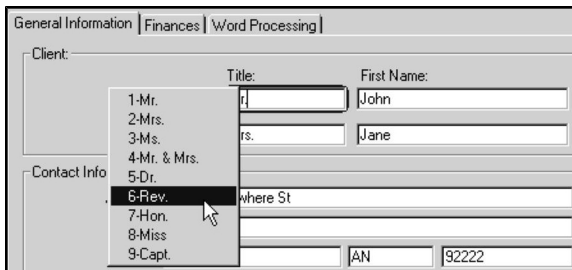
ℹ️ DVMAX will automatically capitalize the first letter of the name you type if the Auto-Capitalization preference is turned on. To find the Auto-Capitalization preference, first select **Preferences** from the **File** menu and then click the **Assorted** tab.

Add Client Contact Information to a Client Record

To fill out client contact information:

- Type the client's address in the **Address** field. Use two lines if necessary.

- Type the client's city, town or village in the **City** field.

ℹ️ You can type the client's zip code into the **City** field and DVMAX will automatically fill in the City, State and Zip Code fields and move you to the first Phone number field. For more information, see **Zip Code Lookups**.

- Type the two-letter abbreviation of the client's state or province in the **State** field. DVMAX will automatically capitalize any two-letter state or province abbreviation you type.

- Type the client's zip or postal code into the **Zip/Postal Code** field.

ℹ️ DVMAX will warn you if the zip or postal code you type is not the correct length or format for your country. You can choose to ignore this warning and DVMAX will leave what you typed intact.

- DVMAX provides Phone Number fields for up to 3 phone numbers. Type the client's phone numbers, as applicable, into the phone number fields. The second and third phone fields provide space for an Extension (Ext).

- Beside each phone number is a **Time of Day** drop down menu. Use these to identify which phone number is the best contact based on time of day you may be calling the client. For example, you may choose the "Day" option for the Work number, or "Eve" for the Home number.

ℹ️ The labels and time of day drop down menus for each of the Phone fields are customizable with the assistance of DVMAX Technical Support. For example, you may want to use one of the phone fields for a client's cell phone number.

ℹ️ DVMAX automatically formats any telephone number into "xxx-xxxx" or "xxx-xxx-xxxx" format. There is no need to type dashes or parentheses. The system will warn you if a telephone number is not a 7 or 10 digit number. DVMAX will also convert letters to their number equivalents.

- Type the client's occupation into the **Occupation** field.

⚠️ The titles of the Occupation and Item 2 fields are configurable. You can set these fields to contain whatever information is useful to your practice. For more information, see **User Defined Fields**.

- If necessary, type a value into the **Item 2** field.

- Type the client's email address into the **Email Address** field. Email addresses are of the form example@example.com.

- If you wish to send Reminders to this client via email, click to select the **Email Reminders** checkbox.

- If you do not wish to send this client any Reminders, click to select the **Do Not Send Reminders** checkbox.

- If you wish to send Statements to this client via email, click to select the **Email Statements** checkbox.

⚠️ In order to enable the email reminders and statements capabilities, you must also configure email (including selecting **Send Reminders by Email If Possible** checkbox) from the **Email Reminders** tab under **System Constants**. See the **System Constants** chapter for more details.

ℹ️ For more information on sending Reminders, see the chapter, **Reminders**.

Add Notes to a Client Record

The Notes area in the lower right of a client's **General Information** tab is intended for general comments about the client, including family members, staff preferences, etc. These notes only appear on the **General Information** dialog and are not printed anywhere. Notes can hold up to 32 000 characters (about 15-20 pages).

Notes:

> Statement printed on 08/12/04 w/o interest, balance was $8.81, run not confirmed as completed.
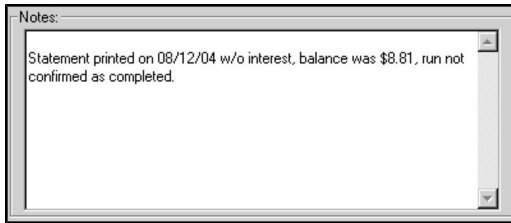
Actions in other sections of DVMAX, such as printing statements, can automatically add text to the notes field of the Client record.

⚠ These comments should be non-critical notes, **not** medical notes or any other critical information. Medical notes should be stored on the appropriate Patient record.

Add a New Patient to a Client Record

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 General Information tab).

Patients:

Status	Name	Sex	Species	Next due

Prev   Next

-OR-

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

4D Client

File Edit Section Client Patients Finances WP Help

DVMax

    View patient record... Ctrl+P
    Add new patient... Ctrl+N

General info for
    Print certificates...
General Information Prescription label...
    Print Patient label
Client:

- A new Patient dialog opens. For information on filling out the Patient dialog, see **Working with Patient Records.**

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

   ℹ️ DVMAX prevents you from combining patients when opening a patient from the client record. To combine patients, you must open the patient record directly. For more information, refer to the **Patients** chapter in this manual.

About Deleting Client Records

If you are absolutely certain that you will have no need for a client record in the future, you may delete that client record from DVMAX.

You cannot delete a client with an outstanding balance or unfinished invoice.

⚠️ Deleting a client will also delete all patients belonging to the client. Deleting a client is permanent and cannot be undone.

An alternative to deleting a client is marking the client as inactive. For more information, see **Marking a Client as Inactive**.

The ability to delete clients can be restricted to authorized users only. For more information, see **Users and Passwords**.

Delete a Single Client Record

To delete a single Client record while you are viewing it:

- Choose **Delete Client** from the **Client** menu.
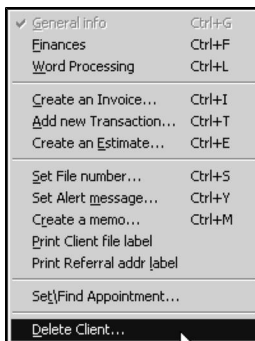
- DVMAX will ask you to confirm that you want to delete this client.
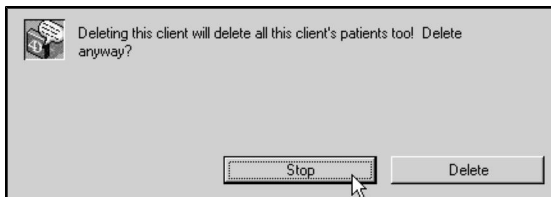
- Click **Stop** to return to the Client record

   -OR-

- Click **Delete** and then click **Yes** when asked again to confirm. The client will be deleted and you will be taken either back to the Find window or to the next client in the set you have been working with.

Delete Multiple Client Records

To delete more than one Client Record at once:

- Use the Find dialog to view a list of the Client records you wish to delete. For information on finding Client Records, see **Searching for and Finding Client Records**.

- Click to select the specific clients you wish to delete from the list. To select contiguous clients, press and hold the SHIFT key while clicking. To select non-contiguously, press and hold the CONTROL key.

- Choose **Delete Records** from the **Clients** menu.

```
Show subset
Exclude subset

Add new Client...      Ctrl+N
Search...              Ctrl+S
Sort...

Delete records...

Export Zip Code File...
Import Zip Code File...
```

- DVMAX will ask you to confirm that you want to delete this client.

```
Delete the selected Client records and all their patients?

        [   Stop   ]        [  Delete  ]
```
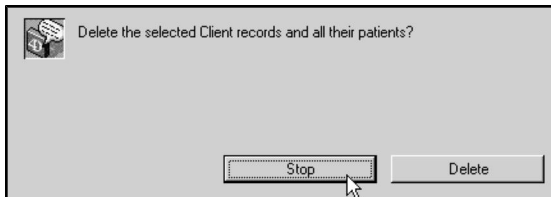
- Click **Stop** to return to the list of Client records

-OR-

- Click **Delete** and then click **Delete** when asked again to confirm. The clients will be deleted, and you will be taken back to the Find window.

Client General Information

The **General Information** tabbed window shows the client's name and address, account information, notes and a list of all patients that belong to the client.

Client Name and Contact Information

See **Creating a Client Record** for details on the various fields that make up a client's name and contact information. Most of these fields contain standard data, such as addresses and telephone numbers. You can configure two of the fields to contain data specific to your practice.

User Defined Fields on a Client Record

DVMAX allows you to define two fields on a Client record. By default, these are set to "Occupation" and "Item 2". You may label these fields to contain whatever data is most useful to your practice. For instance, you may want a field to contain a client's cell phone number or a field to contain a client's fax number.

To define the Data Fields:

- Choose **System Constants** from the **Section** menu.
- Click the **User Settings** tab.

-OR-

- Choose **User Settings** from the **System Constants** menu.
- Type the first label in the **User Defined Client Label 1** field.

- Type the second label in the **User Defined Client Label 2** field.

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

You do not need to define both labels. If you define only the first label, the second will appear as "Item 2" on the Client record.

Zip Code or Postal Code Lookup from a Client Record

DVMAX can memorize zip codes/postal codes and the towns or cities with which they are associated. DVMAX learns this information from the data you enter into the system.

To speed the entry of new clients into the system, you can use the zip code or postal codes of a new client as a shortcut to enter their city and state.

Typically, when you enter client information you will enter the name, the address and then move into the **City** field. If at this point you type the client's zip code into the **City** field, DVMAX will automatically fill in the city, state and zip code for you and will then move you into the next field (home phone) for data entry.

DVMAX will accept zip+4 codes and use only the first 5 digits for the purpose of looking up the matching city and state. If there is more than one city or town associated with the zip code, you will be able to choose the right one from a popup selection list.

If the zip code is not "on file" DVMAX will tell you this and ask you to enter the full information. It will then "learn" that zip code and be able to handle it next time.

⚠️ To use this feature you **must** enter the zip code into the **City** field.

Email a Client Directly from a Client Record

You can send an email directly to the client from the record. Enter an email address in the **Email Address** field. Click the email icon.

View Patient Visit History from a Client Record

The **Visits** button in the General Info section of the Client record lets you view Visit details for all of the Client's patients, including Visit Reason and any status changes (as tracked from the appointment using Check In and Status drop-down menus).

The top section of the Visits dialog shows Visits (current/active and past visits), and indicates whether a visit is active or not.

- If the Visit Active checkbox is selected (checked), then the visit is active.

- Click the **Visit Active** checkbox to deselect and close a patient visit. When you close the Visits dialog, DVMAX will ask to confirm that you want to close the visits you deselect. Those visits will remain in the visit history, but will be marked as inactive. You can also close a visit from an invoice or directly from the patient record.

- The lower portion of the Visit history dialog shows visit Events, or status changes, over a selected visit. These Events are selected from an appointment record. For example, a patient may be marked as being in the Waiting Room,

then an Exam Room, then a Treatment Room. In this way, you can see the approximate amount of time a patient spent in the clinic and where they spent their visit.

The Patient List on a Client Record

The patients associated with the client record are listed in the lower-left hand area of the client's General Information dialog. These are the animals owned by the client. Animals that are split-owned will show the percentage of ownership beside the patient name.

Each patient owned by a client is listed on an individual line. The patient's Status, Name, Sex and Species are listed. For more information on these items, see **Patients**. The patient's next upcoming Reminder is also listed. For more information, see **Reminders**.

Patients in red in the list are due for a recall, or a Reminder is overdue for that patient.

Opening a Patient Record from the Patient List

To open a Patient record while viewing a Client record:

- Double click the desired patient from the Patient List

   -OR-

- Click the patient's name in the Patient List.
- Choose **View Patient Record** from the **Patients** menu.

ⓘ CONTROL+P (COMMAND+P on Macintosh) is a keyboard shortcut for **View Patient Record**.

⚠ DVMAX prevents you from combining patients when opening a patient from the client record. To combine patients, you must open the Patient record directly. For more information, refer to the chapter Patients in this manual.

Adding a Patient to the Patient List

To add a patient to a client's Patient List:

- Double click in an empty area of the Patient List (in the lower left corner of the General Information dialog).

-OR-
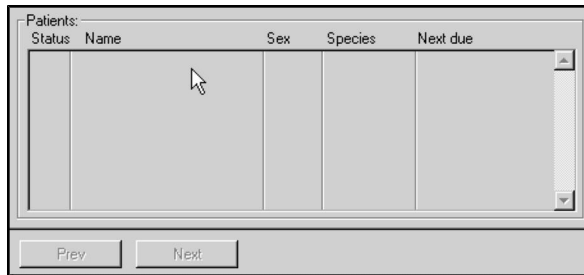
- Choose **Add New Patient** from the Patient drop-down menu.
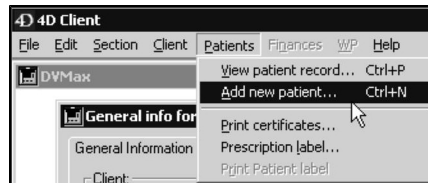
- A new Patient dialog opens. For information on filling out the Patient dialog, see **Working with Patient Records.**

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

About the Client Notes Section of the Client Record

The Notes area in the lower right of a client's General Information dialog is designed for adding general comments about the client - family members, staff preferences, etc. These notes only appear on the General Information dialog and are not printed anywhere. Notes can hold up to 32 000 characters (about 15-20 pages).
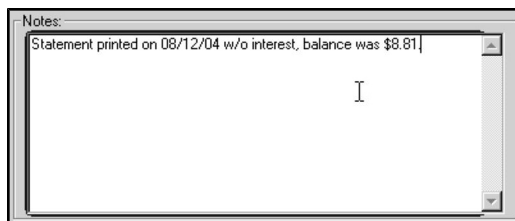
Actions in other sections of DVMAX, such as printing statements, can automatically add text to the notes field of the Client Record.

⚠️ These comments should be non-critical notes, **not** medical notes or any other critical information.

Viewing Account Information from a Client Record

The **Account Information** section of the **General Information** dialog contains an overview of your client's account at your practice. These details include:

- The client's **File Number** at your practice.

- The client's unique **ID Number** as assigned by DVMAX.

ⓘ In many cases the ID number is the same as the File Number – see Client File Numbers for more information on File and ID numbers.

- The **YTD** field contains the amount your client has spent so far this year.

- The **Balance** field contains the client's current balance. See **Viewing Balance Details** for more information.

- The date of the client's **First Visit** to your clinic.

- The date of the client's **Last Activity** at your clinic, where activity is any financial transaction involving the client.

Viewing Balance Details from a Client Record

To see a quick summary of the details of a client's balance:

- Click the **Balance** field in the client's Account Information on the General Information dialog.

- The **Aging Info/Other balances** dialog opens.

- This window contains alert messages, aged balances, payment information and balances at other sites.

Client Referral Details on the Client Record

DVMAX allows you to keep track of how clients 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 clients.

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.

Set a Client's Referral Source

To specify how a client was referred:

- Click the magnifying glass beside the **Ref By** field.
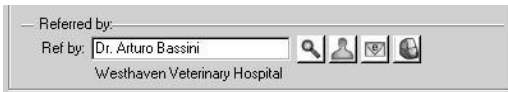
- The **Select Referral Source** window opens.
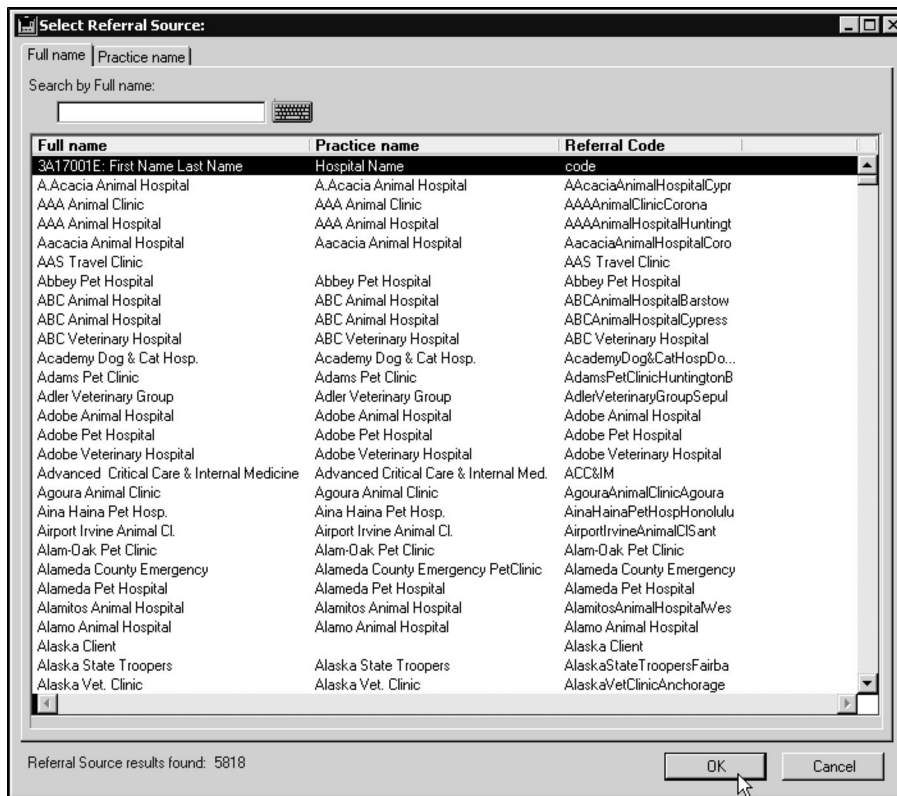
- Click the **Practice Name** tab if you wish to search Referral Sources by Practice Name rather than by the default, **Full Name**.

- 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**.

 You may be able to set the referral source to another client of yours. To set the referral source to another client of your practice, type "Client Referral" into the **Search By** field and click **OK**. This will produce a list of clients in your practice from which you can choose, using techniques similar to those outlined above. 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. It is also possible to enter a referral source directly by typing the practice name or full name in the referral field then hit <TAB>.

Show Client Referral Source Information

To see a quick summary of a client's referral source:

- Click the **Referral Info** button near the **Ref By** field.
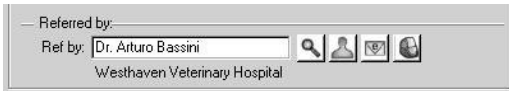
- The Referral Info floating window displays, containing a summary of the client's referral source.
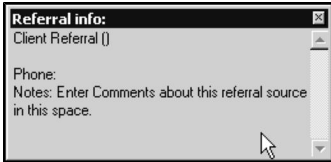
Email a Referral Letter from the Client Record

To email a referral letter directly from the client record, click the **Email** icon to the right of the **Ref by** field. The referral source must have a valid email address listed in the Referral Source record. If the referral source does not have an email address associated with the record, an email address Request dialog will display. Type the referral source email address in the field.

Client Finances

The Client **Finances** tabbed window shows a client's complete financial history, including any unfinished invoices on file. You can also set many billing options from this dialog.
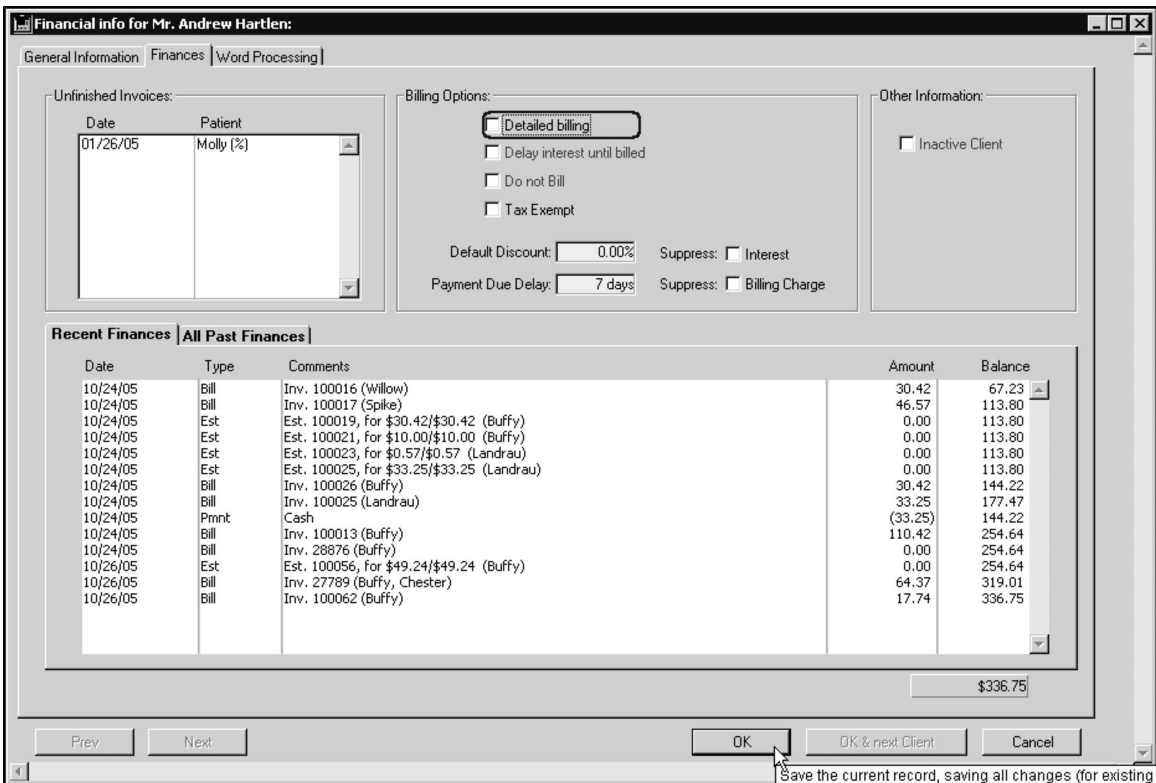
To access the Client Finances dialog:

- Click the **Finances** tab

-OR-

- Choose **Finances** from the **Client** menu
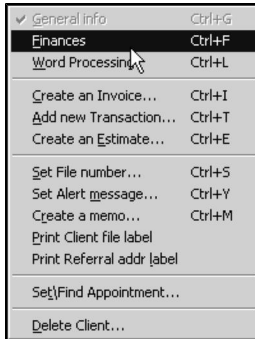
ⓘ CONTROL+F (COMMAND+F on Macintosh) is a keyboard shortcut for choosing **Finances** from the **Client** menu.

Set Client Billing Options

You can set several billing options from the Client **Finances** tab. To turn on any of the options, click to select the checkbox beside the option. To turn off any of the options, click to deselect the checkbox beside the option.
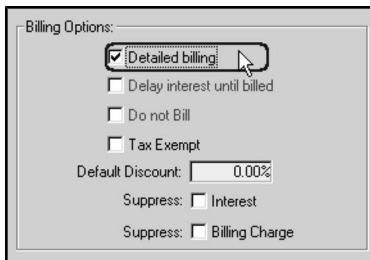
Detailed Billing from the Client Record

The **Detailed Billing** option, when set, assures that simplified copies of all recent unpaid invoices will accompany any printed monthly statement.

Delay Interest Until Billed

The **Delay Interest Until Billed** option, when set, keeps the interest "clock" from starting until a statement is produced by the system at the end of the month. Use this if you normally bill your clients for collected charges at the end of the month.

If this option is not set, interest will be calculated from the dates of individual invoices, rather than of statements.

For example, if you have this option checked and your Grace Period is set to 25 days, then DVMAX will start charging interest 25 days after you print the first statement for the client.

Do Not Bill - Client Billing Option

The **Do Not Bill** option, when set, prevents DVMAX from issuing a statement for any out-standing balance for a client. The client will not be charged interest or a billing fee while this setting is active. This is used when a Client account has been transferred to a collection agency.

Tax Exempt – Client Billing Option

The **Tax Exempt** option, when set, ensures that the client will not be charged any sales tax. Use this for tax-exempt organizations.

Suppress Interest – Client Billing Option

The **Suppress Interest** option, when set, keeps DVMAX from charging interest against any out-standing balance.

Suppress Billing Charge – Client Billing Option

The **Suppress Billing Charge** option, when set, keeps DVMAX from issuing a billing charge on statements.

Default Discount – Client Billing Option

Defines a discount that will be applied automatically to invoices for this client. You can override this setting on any invoice or invoice line item.

To set a default discount for a client:

- Type a percentage into the **Default Discount** field

To remove a default discount for a client:

- Type a percentage of 0 into the **Default Discount** field.

Payment Due Delay – Client Billing Option

The **Payment Due Delay** setting applies only if the **Practice Language Preference** in **System Constants** is set to a language other than English. This setting is used as the basis of a due date calculation for some non-English invoices. See **Multi-Language Support** for more information on this setting.

Mark a Client as Inactive

Marking a client as inactive means the client:

- Will not be sent any statements
- Will not be charged interest or billing charges for any outstanding balance
- Will not be sent reminders.

To mark a client as inactive:

- Click to select the **Inactive Client** checkbox in the **Other Options** section of the **Finances** dialog.
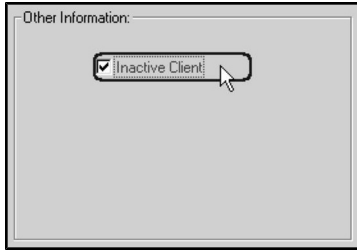
- Click **OK** to save the change.

View Client Financial History

A client's recent financial transactions are listed in the bottom half of the Client Finances dialog. To see a client's complete financial history, click the **All Past Finances** tab on the Client **Finances** dialog.

View a Transaction from Client Financial History

To view an individual transaction from a client's Financial History:

- Click to select a transaction line from either Past Finances list.

- Choose **View Item** from the **Finances** menu

Print a Transaction from Client Financial History

To print an individual transaction from a client's Financial History:

● Click to select a transaction line from either Past Finances list.

● Choose **Print Item** from the **Finances** menu.

Viewing Balance Details

To see a quick summary of the details of a client's balance:

● Click the **Balance** field in the lower right of the Client **Finances** tab.
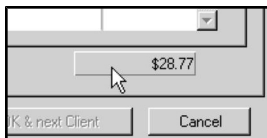
● The **Aging Info/Other balances** window displays.
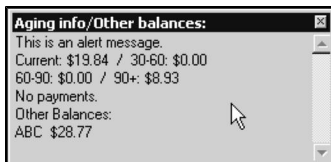
● This window contains aged balances, payment information, and balances at other sites.

View Unfinished Invoices

A client's unfinished invoices are listed in the upper left hand side of the Client **Finances** tab.
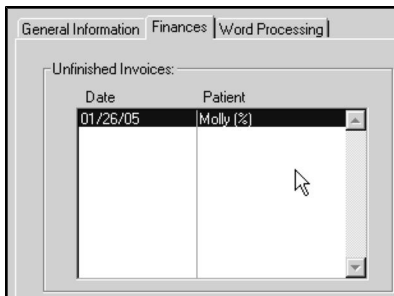
To view an unfinished invoice:

● Double click an unfinished invoice in the list.

-OR-

- Click to select an unfinished invoice from the list.
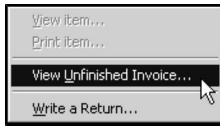
- Choose **View Unfinished Invoice** from the **Finances** menu.

For more information on unfinished invoices, see **Invoices.**

Word Processing from a Client Record

You can use the Word Processing function under the client record **Word Processing** tabbed window to write letters and other correspondence to your clients, utilizing templates and accessing relevant client, patient and financial information. The **Word Processing** window gives you the option to **Open** a template document or create a **New** blank document.
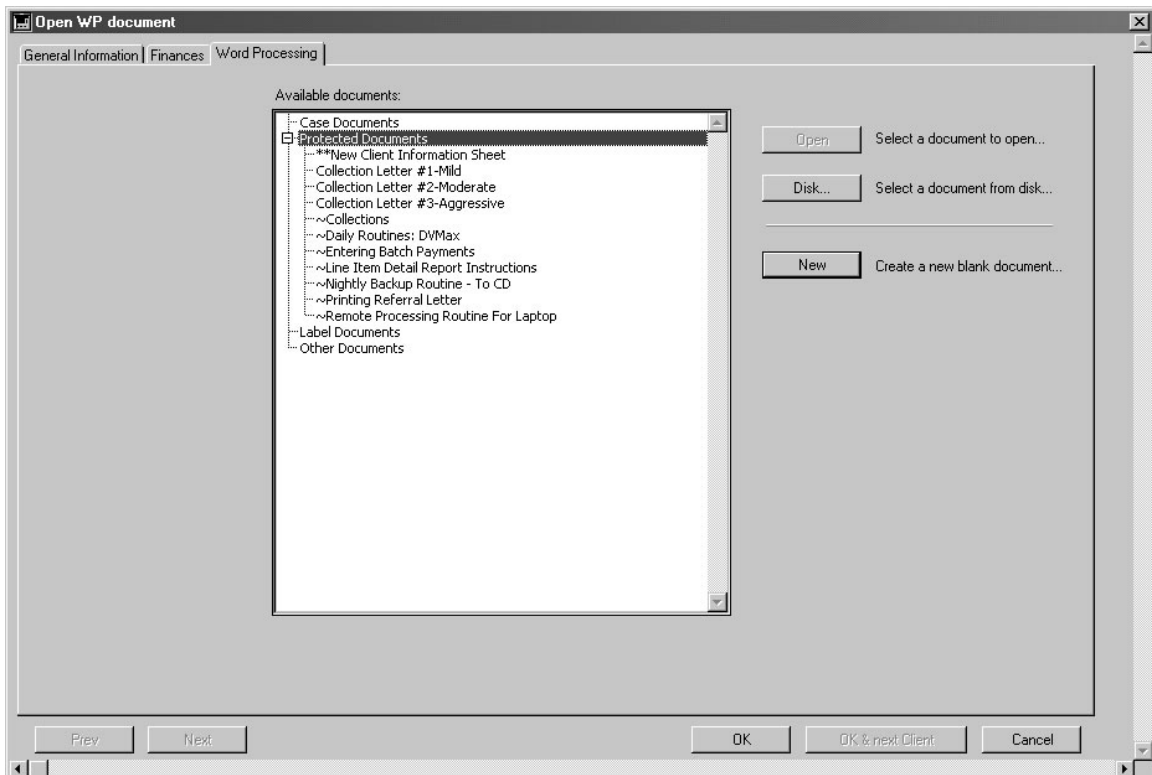
For a complete discussion of using the Word Processor to write to clients, see **Word Processing**.

About the Client Word Processing Palette

The Client Word Processing palette allows you to easily insert client and patient information into a document.
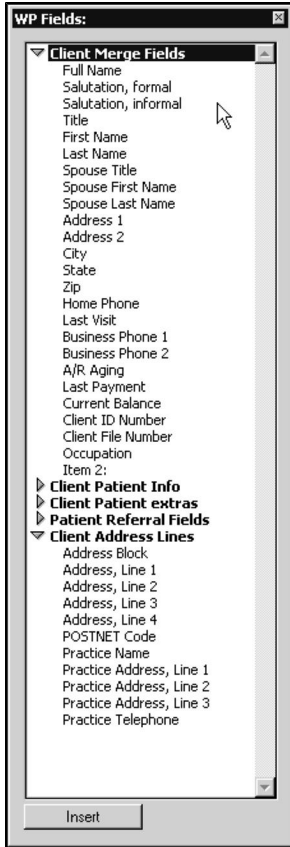
Opening the Client Word Processing Palette

To open the Client Word Processing Palette at any time while working on a Client Word Processing dialog:

- Click the **Show Palette** button in the lower left of the WP window.
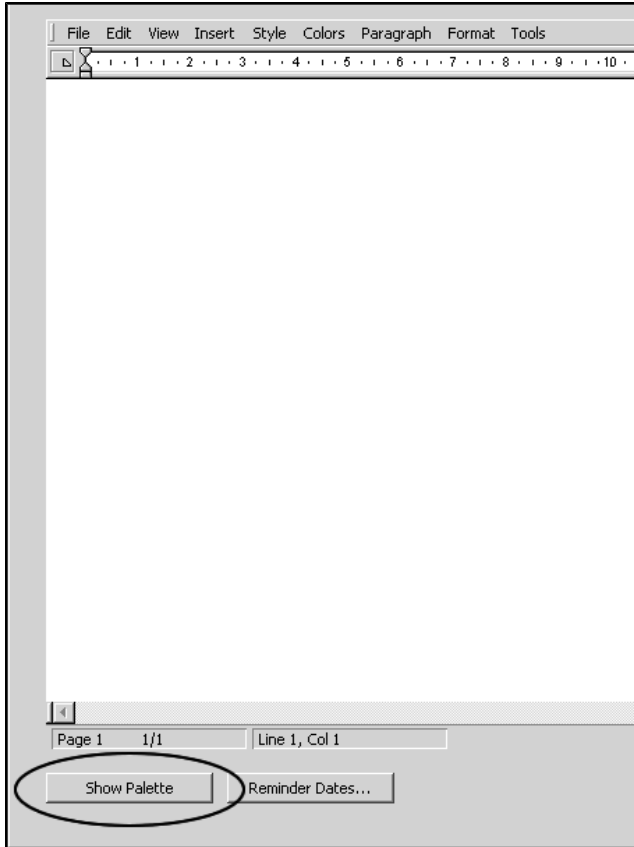
Closing the Client Word Processing Palette

To close the Client Word Processing Palette at any time while working on a Client Word Processing dialog:

- Click the **Close** box ('x') in the upper right corner of the Palette.

-OR-

- Click the **Hide Palette** button in the lower left of the WP window.
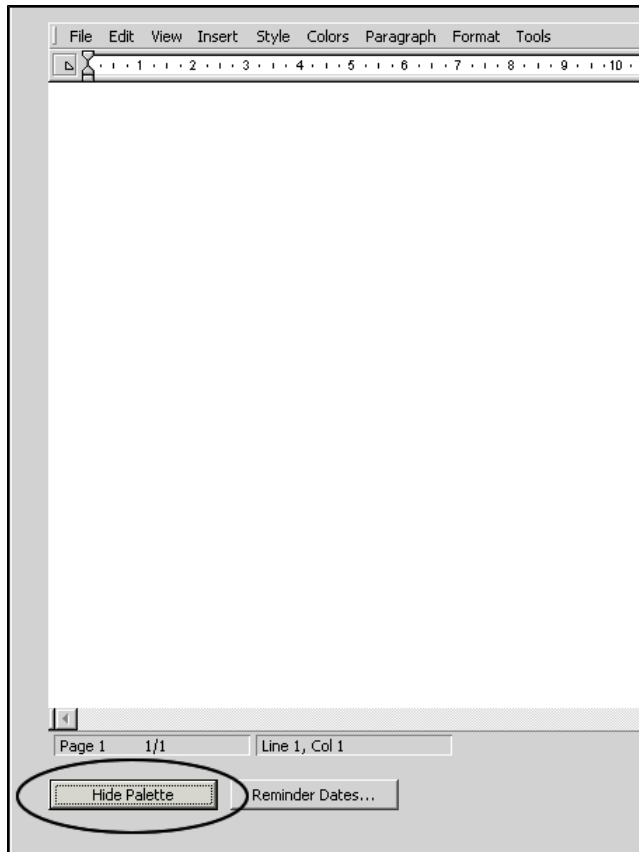
Using the Client Word Processing Palette

To use the Client Word Processing Palette, simply click an information field on the palette, then click **Insert** at the bottom of the palette. DVMAX will place the selected information into the word processing document at the current cursor position. Double clicking a field name in the Palette is a shortcut for inserting that field.

ℹ️ Holding down the <Shift> key on your keyboard while inserting an item from the Word Processing Palette will capitalize the text you are inserting.

The Client Word Processing Palette is broken down into 5 main "groups" of references:

- **Client Merge Fields** insert information from the client record onto a document.

- **Client Patient Info** inserts information about the client's patients onto a document.

- **Client Patient Extras** inserts pronouns and other special items related to patient information onto a document.

- **Patient Referral Fields** insert information about the referral source for this client.

- **Client Address Lines** insert the Client or practice address onto a document.

⚠️ Adding information through the **WP Palette** creates a reference to that field from the current client record, as opposed to copying that information from the current client record. This

means that if you insert the client's "name" onto the document, then that document can display the name of whichever client record you are viewing at the time you load the document.

Client Merge Fields (Word Processing)

Inserting any of the Client Merge Fields will place that information from the client record into the document.
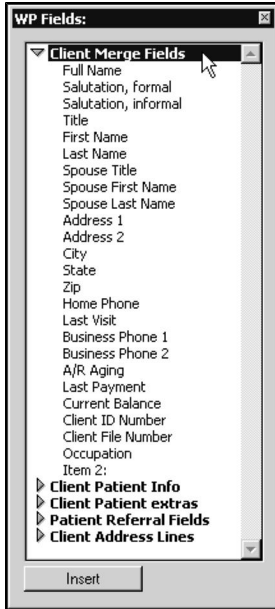
Client Patient Info (Word Processing)

Client Patient Info references allow you to insert information on a group of patients belonging to this client.
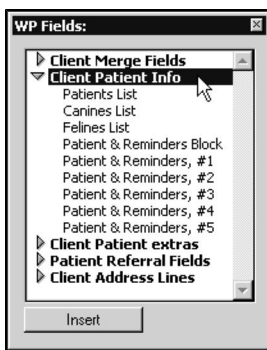
⚠ These references can deal only with groups of a client's patients. To write about an individual patient, use the Word Processing Palette on the Patient Word Processing dialog.

Patients List: Inserts a list of all living patients that belong to this client. DVMAX separates this list by commas if there are more than 2 patients and by "and" if there are only 2 patients. Single patients are listed alone. This makes it easy to write a sentence like "We welcome **Fluffy, Suzie, and Munch** to our practice!"

Canines List: Similar to the Patients list command except that it inserts living canines only. DVMAX identifies which patients are canines by comparing their species code to that specified for canines in System Constants - Client & Patient settings.

Felines List: Similar to the Patients list command except that it inserts living felines only. DVMAX identifies which patients are felines by comparing their species code to that specified for felines in System Constants - Client & Patient settings.

Patient & Reminders Block: Inserts a block of text listing all patients due for reminders as well as the procedures for which they are due. The system determines which patients are due based on the criteria of your most recent search for reminders.

The block will show the patient names on the left, and then include a list of reminders for which they are due to the right. This list of reminders is built from the "short note" field in the Reminder Type record. The block will include all patients that are due, and is very useful if you send reminder letters to your clients to inform them when their animals are due for their vaccines, etc. It is not recommend for use on reminder cards because it may easily exceed the size of a single card.

See **Reminders** for more information.

Patient & Reminders #1 through #5: These commands insert a single line, one for each patient belonging to this client that is due for reminders. Each line is constructed in the same fashion as the Patient & Reminders block, with the patient name on the left, and the list of reminders slightly to the right.

Using the separate lines it is possible to build a compact document for printing onto a postcard. This makes it possible to send a single reminder card which refers to multiple patients to a client.

Client Patient Extras (Word Processing)

Client Patient Extras words your document so that it reads correctly regardless of how many patients you are addressing.

To use these commands, locate the type of "extra" you want to add (**Pluralize, is or are, they or he-she, their or his-her, them or him-her**). Then select the "group" of patients on which DVMAX will base the "extra" (**All Patients, Canines, Felines, Reminders**).

For example, if you were writing to welcome a new client to your practice, you might write: "We want to welcome your **pet** to our practice!" But this would only be correct if the client has only one pet. If they have several animals, you would have to write: "We want to welcome your **pets** to our practice!"

Pluralize: will add an "s" wherever it is inserted if the referred group has more than one patient. Thus "We welcome your pet to our practice" can automatically become "We welcome your pets to our practice".

Is or are: provides the right form of "is" or "are" depending on how many animals you are referring to. For example: "Your pet is going to feel right at home in our practice" can automatically become "Your pets are going to feel right at home in our practice".

They or he-she: provides the right pronoun for the number of animals you are referring to. For example: "We know that **he** will feel comfortable with our staff" can become "We know that **they** will feel comfortable with our staff". In the case of just one animal, DVMAX will automatically select the appropriate pronoun (he or she) based on the sex of the animal.

Their or his-her: provides the right possessive pronoun depending on the number of animals you are referring to. For example: "We will write again when **his** vaccines are due" can automatically become "We will write again when **their** vaccines are due". DVMAX will automatically select the appropriate pronoun (he or she) based on the sex of the animal.

Them or him-her: provides the right pronoun depending on the number of animals. For example: "We know you love **him,** so be sure to come back for your free follow-up exam" can become "We know you love **them,** so be sure to come back for your free follow-up exams".

Patient Referral Fields (Word Processing)

Patient Referral Fields allow you to insert information from the Client referral source onto a letter or other document. The fields are self-explanatory.
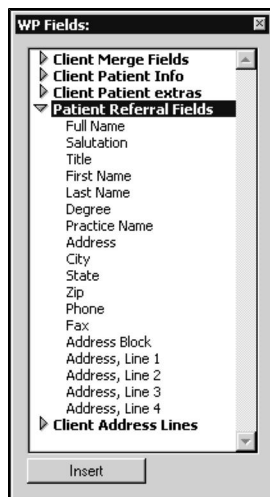
Client Address Lines (Word Processing)

Client Address Lines allow you to insert the client's address onto a letter or other document easily.

Using this menu you can also insert the Practice name, address, and telephone number. This is useful since it will change automatically if the practice should move to a new location.

Below is a list of the other commands and their functions:

Address Block: inserts the complete client address as a single block.

Address, Line 1-4: inserts the client's address line-by-line. Using these separate lines makes it possible to include text to the right of the address if this is required.

POSTNET Code: calculates and inserts a US Postal Service POSTNET delivery code to aid in delivery of your letter. In order to use this feature you must have a printable POSTNET Bar Code Font installed on your computer. The POSTNETcode must be printed using this font and in an appropriate location on your document so it can be read by the Postal Service.

Practice Name: inserts the practice name onto your document. The practice name is taken from System Constants.

Practice Address, line 1 (etc.): inserts the lines of the practice address into your document. The address lines are taken from System Constants.

Practice telephone: inserts the practice telephone number into your document. The practice telephone is taken from System Constants.

Client File Numbers

By default, DVMAX will assign each new client a sequential file number. You can override this assigned file number if you wish to maintain consistency between DVMAX and a secondary filing system.

Setting a Client's File Number

To manually set a client's file number:

- Choose **Set File Number** from the **Client** drop-down menu.

- The **Client File Number** dialog opens.
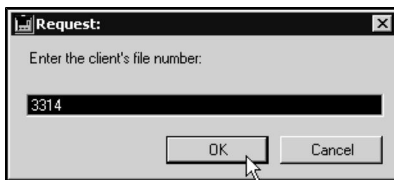
 CONTROL+S (COMMAND+S on Macintosh) is a keyboard shortcut for **Set File Number**.

- Type the new file number and click **OK**.

Reserved File Numbers

DVMAX reserves certain file numbers:

- OTC**:** This file number indicates that this Client record is to be used as an "OTC" ("over the counter" or "cash sale") client. See **Invoicing** for more information.

- **Hospital:** This file number is for the Client record that represents your practice or hospital itself. DVMAX will apply no charges to this client record for any invoices that are written (they are automatically set to a net charge of $0.00), and invoice entries on this client record will not be recorded into a patient history (a "dummy" patient record is still required - we suggest the name "Hospital Use"). We suggest that the name for this Client record be "Inventory Adjustment".

- **Resident:** This file number is similar to the "Hospital" file number, except that entries on invoices for this client will be recorded onto the patient history. You can use this client to record treatments made to resident animals.

Client Alerts and Memos

An **Alert** is a message that appears when you open a Client record in DVMAX.

- Click the Alert to have it open in a window. Click OK to dismiss it. You cannot work with the Client record until you have dismissed the alert. There can be only one alert message per client. Use alerts for critical notes.

- A **Memo** is a message that appears in a floating window when a Client record is opened in DVMAX:

You can continue to work with the Client record while the memo is displayed. It is possible to have more than one memo per client. Memos are useful for alerting staff about follow-up questions, answers, etc. Memos can either be kept on file (to reappear the next time the Client Record appears), or deleted.

Set a Client Alert

To set an alert that will appear as soon as a Client record is opened:

- Open the Client Record for which you wish to set an alert.

- Choose **Set Alert Message** from the **Client** menu.
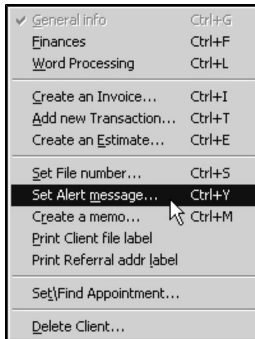
CONTROL+Y (COMMAND+Y on Macintosh) is a keyboard shortcut for **Set Alert Message**.

- The **Alert Note** dialog opens.

- Type your message into the Alert Note dialog.

- Click **OK** to save the alert message.

-OR-

- Click **Cancel** to close the Alert Note dialog without setting an alert.

Edit an Alert Message

To change the text of a client's alert message:

- Open the Client Record for which you wish to edit the alert.
- Choose **Set Alert Message** from the **Client** menu.
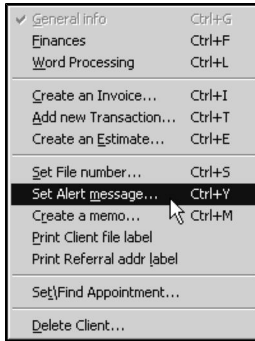
CONTROL+Y (COMMAND+Y on Macintosh) is a keyboard shortcut for **Set Alert Message**.

- The **Alert Note** dialog opens.

- Change the text in the Alert Note dialog.
- Click **OK** to save the changed alert message.

-OR-

- Click **Cancel** to close the Alert Note dialog without saving your changes.

Delete a Client Alert

To remove an alert from a Client record:

- Open the Client record from which you wish to remove the alert.
- Choose **Set Alert Message** from the **Client** menu.
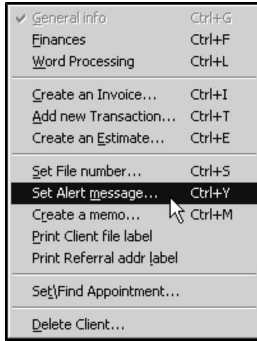
ℹ️ CONTROL+Y (COMMAND+Y on Macintosh) is a keyboard shortcut for **Set Alert Message**.

- The **Alert Note** dialog appears.
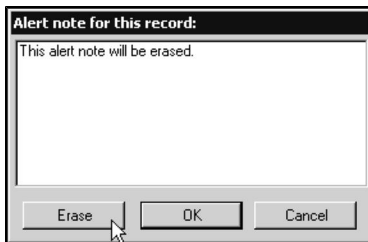
- Click **Erase**. The Alert Note dialog closes and the alert is removed from the Client Record.

Setting a Client Memo

To set a memo to display in a floating window when a Client record is opened:

- Open the Client record for which you wish to set a memo.

- Choose **Create a Memo** from the **Client** menu.
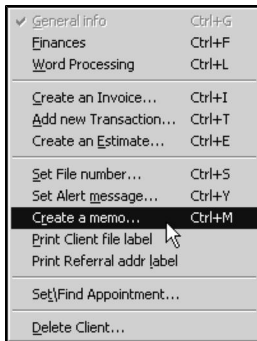
- The Memo dialog field appears.
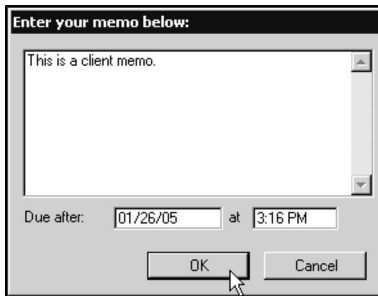
- Type the text of the memo in the Memo dialog field.
- If necessary, type the date and time after which the memo should appear into the appropriate spaces. The current date and time are filled in by default.
- Click **OK** to save the memo to the Client Record.

-OR-

- Click **Cancel** to close the Memo dialog without setting a memo.

Dismiss a Client Memo

You can dismiss a client memo without deleting it. This means that the memo will appear the next time the Client record is accessed.

To dismiss a client memo, click **OK & Keep** when the memo appears.

Delete a Client Memo

To remove a memo from a Client record:

- Open the Client record from which you wish to remove the memo. The memo you wish to remove will appear.

- Click **OK & Delete**.

Edit a Client Memo

There is no way to edit a client memo. To change a client memo, create a new memo and delete the old memo requiring change.

Set a Client Appointment

You can jump to the Appointment Scheduler while viewing a client record to schedule an appointment for the selected client or associated patients.

To go to the Appointment Scheduler from a Client dialog:

- Choose **Set Appointment** from the **Client** menu.

- The Appointment window opens, ready to schedule a new appointment for this client. Note that on the top of the Scheduler beside the DVMAX icon, there is a note that says, "Next scheduled appointment will be for <Client Name>."

For more information on setting and finding appointments, see **Appointments.**

Print Labels from the Client Record

You can print a variety of useful labels while viewing a Client record. In each case below, the label will contain information pertaining to the open Client record.

⚠ Label printing requires a label printer. For information on setting up a label printer to work with DVMAX, see Setup Label Printers.

Print a Client File Label

A Client File Label contains the client's name, phone number, File and ID numbers and is useful for labeling a folder or other documents.

To print a single Client File Label:

- Choose **Print Client File Label** from the **Client** menu.
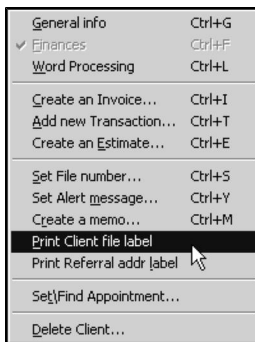
Print a Client Address Label

A Client Address Label is useful for mailing correspondence to a client.

To print a single Client Address Label:

- Click the **Client Addr Label** button in the **Contact Information** area of the client's **General Information** dialog.

Print a Referral Address Label

This label includes a client's referral source name and address.

To print a single Referral Address Label:

- Choose **Print Referral Addr Label** from the **Client** menu.

    -OR-

- Click the **Ref Addr Label** button in the **Referred By** section of the client's **General Information** dialog.
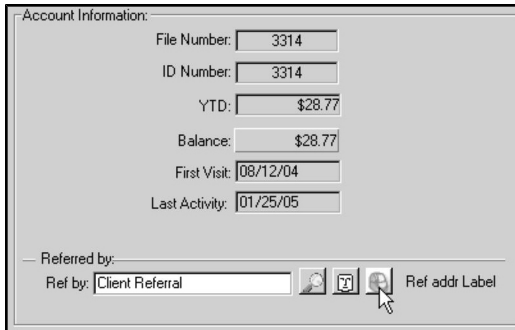
Print a Patient Label

For information on printing a Patient Label while working with a Client Record, see **Working with Patients on the Client Record.**

Working with Patients from the Client Record

You can perform several operations relating to a client's patients while you are working with the Client record. These operations are available only while you are on the **General Information** dialog.

For complete information about working with Patients, see the **Working with Patient Records** section of this manual.

Print Certificates from a Client Record

DVMAX allows you to quickly print certificates for any of the patients belonging to a client.

To print a certificate while working with a Client Record:

- Choose **Print Certificates** from the **Patients** menu.

- The **Certificate Printing** dialog appears.
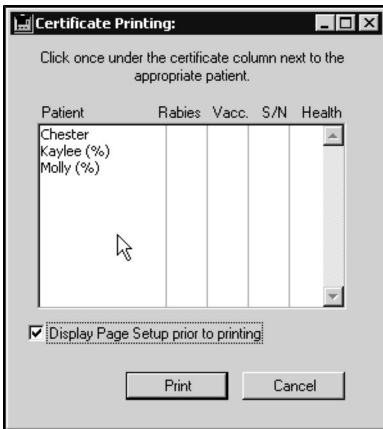
- Click once in the appropriate columns to choose which certificates to print for each patient.
- If desired, click to select the **Display Page Setup Prior to Printing** checkbox.
- Click **Print.**

Print Prescription Labels from a Client Record

DVMAX allows you to print a prescription label for a selected patient (or for any patient belonging to a client) while working with a Client record.

To print a prescription label while working with a Client record:

- Choose **Prescription Label** from the **Patients** menu.

- The **Prescription Labeling** dialog appears.

For information on filling out the Prescription Labeling dialog, see **Prescriptions.**

Print a Patient Label from a Client Record

You can print a Patient Label while working with a Client Record. For more information on Patient Labels, see **Working with Patient Records**.

To print a Patient Label while working with a Client Record:

- Click once to select a patient from the Patient List.

- Choose **Print Patient Label** from the **Patients** menu.

Print Client Reports and Statements

DVMAX offers a number of predefined Client reports and statements. To print these reports or statements:

- Choose **Print** from the **File** menu when viewing a Client or list of Clients.
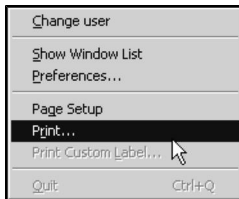
- The **Printing Clients** window appears
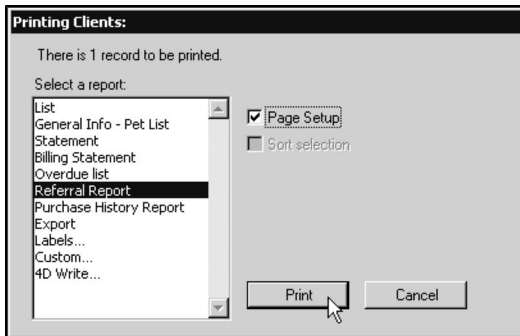
- Select the report you would like to print from the list of available reports. For more information on each type of report, see its documentation.
- If necessary, click to select the **Page Setup** checkbox.
- Click **Print.**

⚠️ Reports will be based on the number of Client Records selected in the Client List Window. If you are viewing an individual Client Record, the report will be based on that one Client Record. For more information on the Client List Window, see Searching For and Finding Client Records.

The Client List Report

The **Client List Report** prints a list of selected clients. The list includes client ID or File number, client name, address, home phone number and business phone number.

The General Info – Pet List Report

For each selected client, the **General Info – Pet List** report prints client name & contact information, then a list of the client's patients, including their sex and species, next due and reason for next visit.

Statement (Client Record)

A statement is a summary of all financial activity on the client's account.

Normally, when you select **File**->**Print** to print a statement or billing statement for a client, DVMAX will post a "STMT" transaction to the client's transaction history. The **clients.postStatementTransactionWhenReprinting** advanced setting can be used to suppress this behavior. The default value is True. Contact DVMAX technical support for more information.

Billing Statement

For each selected client. DVMAX will print a statement listing any items outstanding on the client account.

ℹ️ If Detailed Billing is set on the client's Finance dialog, the billing statement will also print a copy of any outstanding invoices for the last 30 days. For more information, see Setting Billing Options for a Client.

Overdue List

Typically, you will print this report after searching for clients with overdue accounts. (See Searching For and Finding Clients for more information). The **Overdue List** prints a listing of client names, home and business phone numbers, balance due, last payment amount and last payment date.

Referral Report

This report is typically printed after searching for a specific group of clients (such as new clients from a specific time period). The Client Referral Report lists clients referred by Doctor, Hospital or other Client. Patient information is provided for each client, along with a total number of referrals and the revenue generated from each referral.

When you generate a Client Referral Report, DVMAX will present you with the **Referral Report Options** dialog.
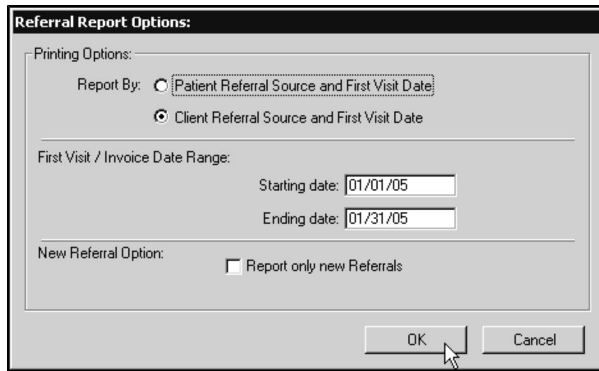
To complete the **Referral Report Options** dialog:

- Click to select the **Client Referral Source and First Date** radio button.

- Type a Start and End date into the fields provided. Referrals must have first visited your clinic within these dates to be counted in the report.

- To report only on New Referrals in the given time period, click to select the **Report Only New Referrals** checkbox.

- Click **OK**.

Purchase History Report

The Purchase History Report lists all purchases made by each selected client in a given time period. The date of the purchase, invoice number, Bill Item code and description, Doctor, quantity, price, extended price and item total are all listed. Subtotals are provided per patient and per client.

When you generate a Purchase History Report, DVMAX will present you with the **Purchase History Options** dialog.
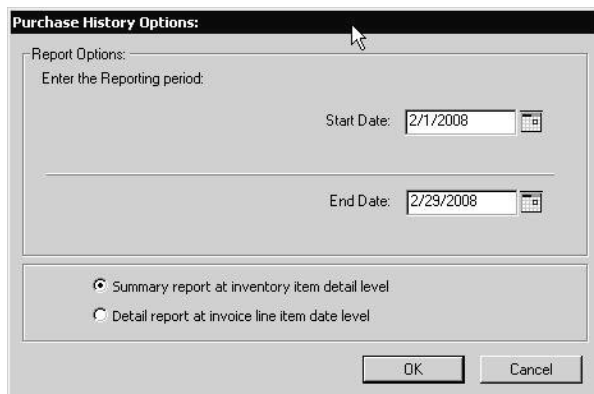
To fill out the **Purchase History Options** dialog:

- Click the calendar beside the **Start Date** field to enter a starting date for the report, or type a date directly into the field itself.

- Click the calendar beside the **End Date** field to enter an ending date for the report, or type a date directly into the field itself.

- Select whether you would like a **Summary report at inventory item detail level**, or a **Detail report at invoice line item date level**.
- Click **OK**.

System Constants that Affect the Client Record

Some behaviors and appearances in Client records are set or affected by settings in System Constants.

Client and Patient Settings

To access the Client and Patient Settings:

- From the **Section** drop-down menu of the DVMAX main window, choose **System Constants**. The System Constants dialog appears.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Client & Patient Settings**. Alternatively, locate and click the **Client & Patient Settings** tab. The Client & Patient Settings dialog appears.
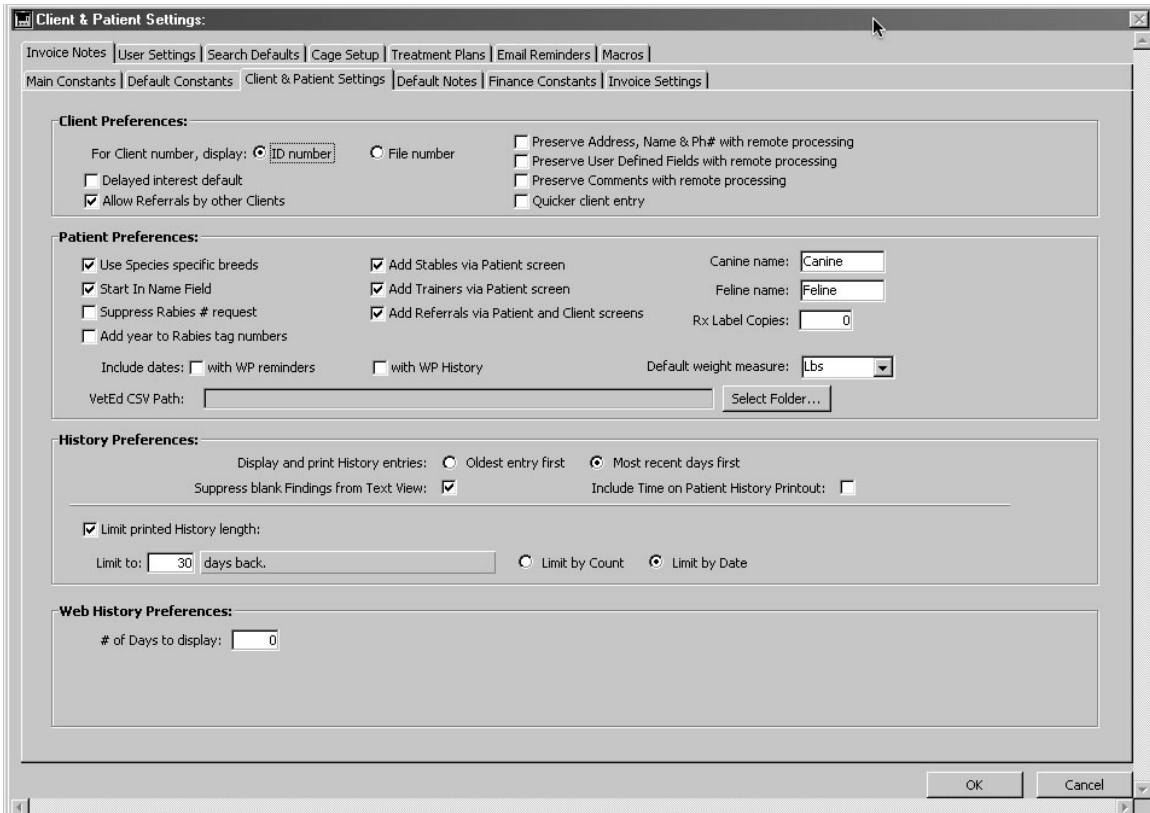
For Client Number, Display: ID Number or File Number

This setting determines whether the Client ID number or File number will be shown on Client list dialogs, invoices, statements and reports.

Quicker Client Entry

This setting enables DVMAX to accept new clients quickly, one after another. **Quicker Client Entry** is typically used when a system is first set up, to speed entry of an existing client base.

When **Quicker Client Entry** is selected DVMAX will bring up a new client record as soon as you have clicked **OK** on the previous client record, or as soon as you click **OK & Next Client** on a patient record.

This setting will also allow you to enter patients repeatedly by clicking **OK** on the patient record.

Delayed Interest Default

This is the default setting for the **Delay Interest Until Billed** option on the Client Finances dialog. If **Delayed Interest Default** is checked, then **Delay Interest Until Billed** will be selected for every new client.

Default Constants

To access the Default Constants:

- From the **Section** drop-down menu of the DVMAX main window, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Default Constants**. Alternatively, locate and click the **Default Constants** tab. The Default Constants window appears.

Default Client City, State and Zip Code from System Constants

The text in these three fields will appear initially in the corresponding location of a new Client Record.

User Settings for Client Records

To access the User Settings:

- From the **Section** drop-down menu of the DVMAX main window, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main window, choose **User Settings**. Alternatively, locate and click the **User Settings** tab.

User Defined Fields for Client Records

The text typed in these fields will appear as labels in the corresponding location on all client records. See the discussion in the **User Defined Fields** section under **Client General Information**.

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Integrated Credit Card and Debit Card Processing

DVMAX offers fully integrated credit and debit card processing capabilities that allow for the automatic capture of all payment information. The easy-to-use Payment Terminal Setup Wizard lets you configure your workstation to run an EMV terminal (chip card capable) or a non-EMV terminal. You must have a persistent internet connection (not dial-up) to utilize the credit card processing feature.

Advantages to this feature include:

- No more manual processing.
- Entry mistakes, mismatched end of day reports, and the time spent correcting these are all eliminated.
- All payment information is automatically captured from credit and debit cards and processed through DVMAX.

This chapter describes how set up your workstation(s) to use the credit card processing feature and how to process a payment from an invoice, estimate or other similar transaction using credit or debit card. Batch Reports and Credit and Debit Card Transaction logs are described in this chapter as well.

🛈 If you plan to have more than one pay terminal set up at your location, each terminal must have its own set up. DVMAX also includes an option for multiple merchant accounts if needed. See **About the Payment Terminal Setup Wizard** for more information.

Setting Up Integrated Credit and Debit Card Processing: An Overview

With DVMAX's integrated credit card and debit card payment processing functions, transactions are authorized in real time using supported gateway(s) via an internet connection. To enable the credit and debit card processing feature, you need to complete three main steps:

- Assign DVMAX users proper security access to allow them to accept credit and debit card payments.
- Connect the hardware peripherals to the Payment Terminal workstation(s), where applicable.
- Run the Payment Terminal Setup Wizard to configure the payment terminal(s).

Assign Security Group Access to Users for Credit Card Processing

You must add users to the Credit Card Processing security group before they can process credit and debit card payments. Only users in this group are able to initiate transactions, access the setup wizard, or browse credit card processing logs.

To add users to Credit Card Processing security group:

- From the **Section** menu, select **General Management**. The Management Functions dialog opens.
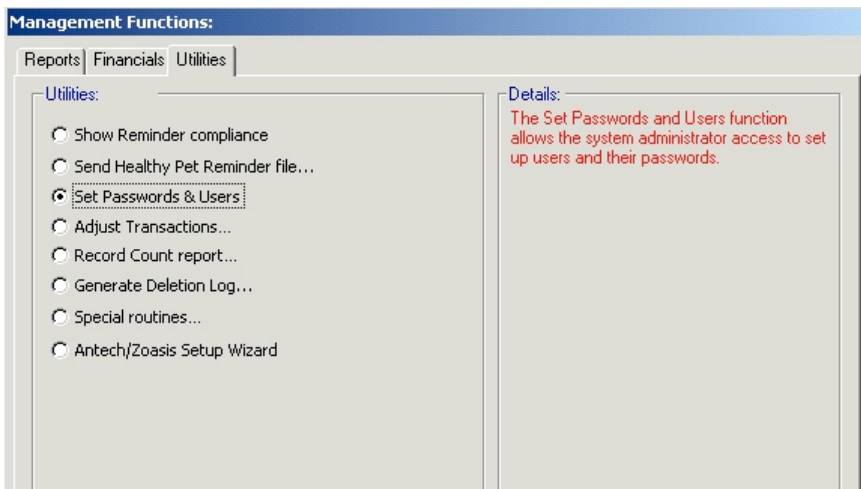
- Select **Set Passwords and Users**, and click **OK**. The Tool Box dialog displays.
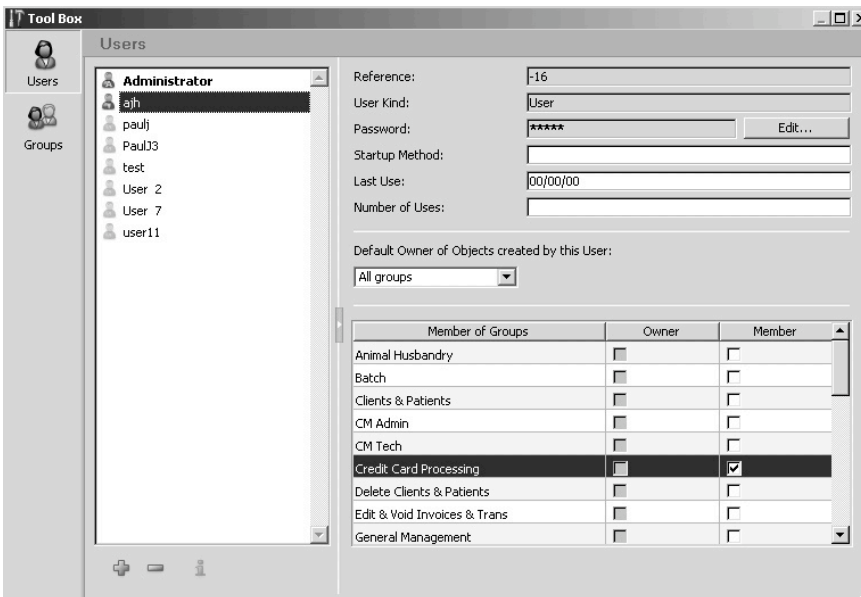
- Select the user you wish to assign to the Credit Card Processing group. In the Member column, select the **Credit Card Processing** check box.

- Alternatively, click the **Groups** icon, select the **Credit Card Processing** group, and add users to it by selecting the check box beside their name.
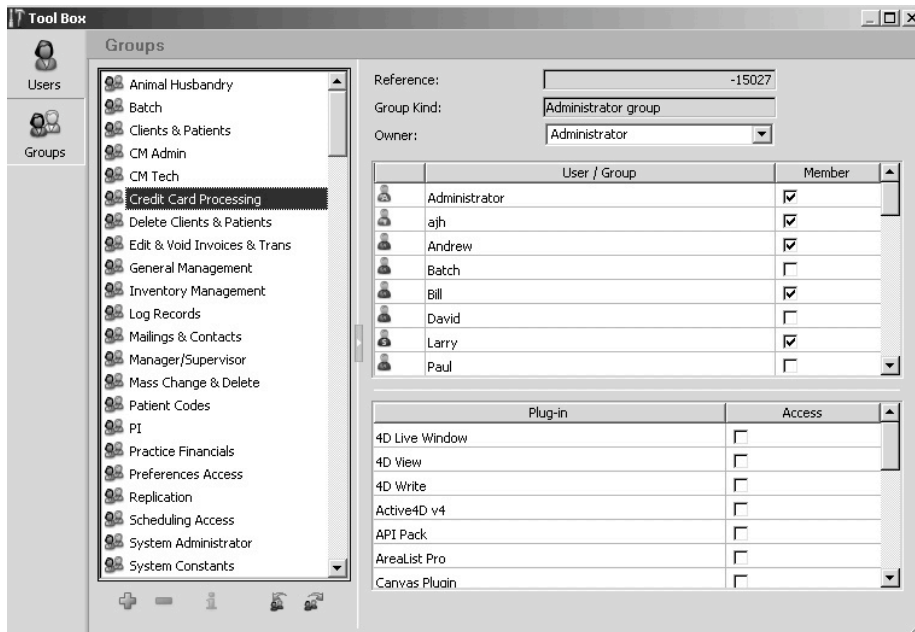
- Close the Tool Box.

Connect Your Hardware Peripherals for Credit and Debit Card Processing for EMV Terminals

To be able to accept debit and credit card payments through DVMAX, you need to connect the relevant hardware peripherals. If you are running an EMV Terminal, your EMV Smart Terminal (iPP320) and Epson receipt printer need to be connected to the workstation you are setting up as a pay terminal. DVMAX supports multiple merchant accounts, so you may have more than one type of pay terminal and/or peripheral(s) in your clinic. If you are running a non-EMV Terminal, see *Connecting Your Hardware and Peripherals for Credit and Debit Card Processing for Non-EMV Terminals*.

To connect your hardware peripherals to the workstation:

- Plug the smart terminal or card reader into a USB port on the pay terminal workstation.

- Set up your receipt printer, if applicable. See supported devices under **Receipt Printer** in this chapter of the User Guide.

ℹ You can have more than one pay terminal set up at your location but each terminal has to be set up. DVMAX also includes an option for multiple merchant accounts, if needed. See **About the Payment Terminal Setup Wizard** for more information.

ℹ For assistance in setting up your payment terminals, contact DVMAX Technical

EMV Terminal

DVMAX supports the use of EMV Terminals (Integrated Circuit or Chip Card Capable Point of Sale Terminals). The EMV Terminal is both a card reader and a PINPad device. Plug the EMV Terminal into an available USB port on the workstation you are configuring for EMV transactions.

You will need to install ancillary software to run an EMV Terminal. Contact IDEXX Sales at 800-283-8386, option 5 (for Payment Processing) for information on supported EVM terminals and ancillary software setup.

Receipt Printer

For credit card processing with EVMV terminals, only the network ready **Epson TM88IV** or **TM-T20** receipt printers are supported.

Epson TM88IV or TM-T20 Ethernet - Paper as per Epson specifications (Thermal Roll Paper). The Epson Printer requires an Ethernet cable to access LAN.

Connecting Your Hardware Peripherals for Credit and Debit Card Processing for Non-EMV Terminals

To be able to accept debit and credit card payments through DVMAX, you need to connect the relevant hardware peripherals. For a non-EMV Terminal, your card reader (optional), receipt printer (optional) and/or PINPad (optional) need to be connected to the workstation you are setting up as a pay terminal. Details regarding the various peripherals are noted in sections in this chapter titled **Card Swipe Track Reader**, **Receipt Printers** and **PINPad**. DVMAX supports multiple merchant accounts, so you may have more than one type of terminal and/or peripheral (s) in your clinic. If you are running an EMV Terminal, see *Connecting Your Hardware and Peripherals for Credit and Debit Card Processing for EMV Terminals*.

To connect your hardware peripherals to the workstation:

- Plug the card reader, where applicable, into a USB port on the pay terminal workstation.

- Set up your receipt printer, if applicable. See supported devices under **Receipt Printer** in this chapter of the User Guide.

- Plug the PINPad, if you are using one, in to a USB port on the pay terminal workstation. Be sure to install the driver for this device, where applicable, before using. The use of a Keyspan USB/serial adapter will be needed if your computer does not have a serial port.

ⓘ You can have more than one pay terminal set up at your location but each terminal has to be set up. DVMAX also includes an option for multiple merchant accounts, if needed. See **About the Payment Terminal Setup Wizard** for more information.

ⓘ For assistance in setting up your payment terminals, contact DVMAX Technical Support, or visit DVMAX online for support documents at: https://dvmaxb.atlassian.net/wiki/spaces/DP/pages/1179827/Credit+Card+Processing

Card Swipe Track Reader

DVMAX supports the use of keyboard equivalent swipers, as well as a number of other card readers. You may need to install a driver for this device before using. We recommend you visit https://dvmaxkb.atlassian.net/wiki/spaces/DP/pages/1179827/Credit+Card+Processing or contact DVMAX Technical Support for help with identifying supported card readers and installing drivers, as needed. You will need an EMV terminal if you plan to run chip card transactions. See the section titled **EMV Terminal**.

Receipt Printer

DVMAX Credit Card Processing supports the use of the **Dymo/Costar LabelWriterSE300** and **SE450**, the **Star TSP700II**, as well as the network ready **Epson TM88IV** or **TM-T20** receipt printers. *Only the Epson printers are supported for EVM Terminals*.

⚠ If you are using a serial to ethernet adapter to connect your device, you will need to specify your IP address. Contact DVMAX Technical Support for assistance.

Dymo/Costar LabelWriter – Paper as per Dymo specifications.

Epson TM88IV or TM-T20 Ethernet - Paper as per Epson specifications (Thermal Roll Paper). The Epson Printer requires an Ethernet cable to access LAN.

Star TSP700II – Paper as per Star Micronics specifications. Be sure to install the appropriate printer driver. This printer will require a USB port.

PINPad

DVMAX supports the use of the Verifone 1000SE for non-EMV terminals. Note that this is a serial device and will require a Keyspan USB/Serial adapter if there is no serial port on the workstation you plan to use as the pay terminal. The Keyspan serial adapter driver must be installed on the system before using the adapter. For supported EMV Terminals, see the section **EMV Terminal**.

⚠ If you are using a serial to ethernet adapter to connect your device, you will need to specify your IP address. Contact DVMAX Technical Support for assistance.

About the Payment Terminal Setup Wizard

Once users have security access to credit card processing and the peripherals have been connected, a workstation can be set up as a pay terminal. The Payment Terminal Setup Wizard walks you though a simple, step-by-step process for configuring a DVMAX workstation to accept real-time credit and debit card payments. Payments are authorized in real time using supported payment gateways. Multiple payment terminals are permitted but each terminal has to have its own setup.

To open the Payment Terminal Setup Wizard:

- From the DVMAX **File** menu, select **Preferences**. The DVMAX Preferences tabbed dialog opens.
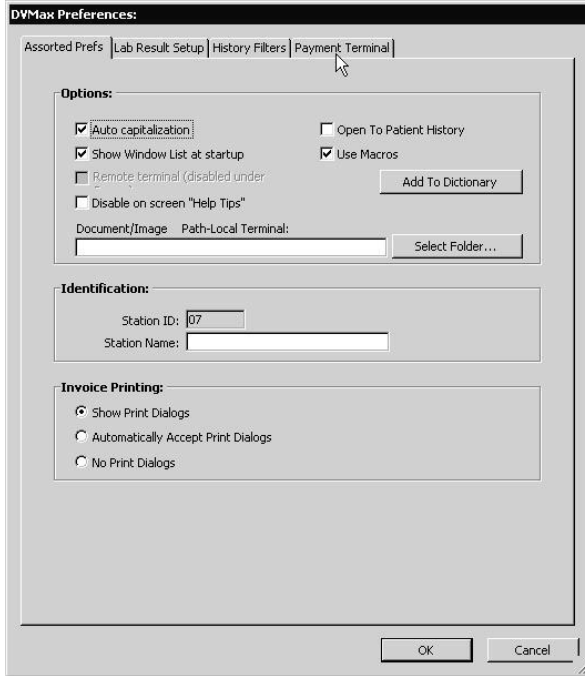
- Choose the **Payment Terminal** tab.
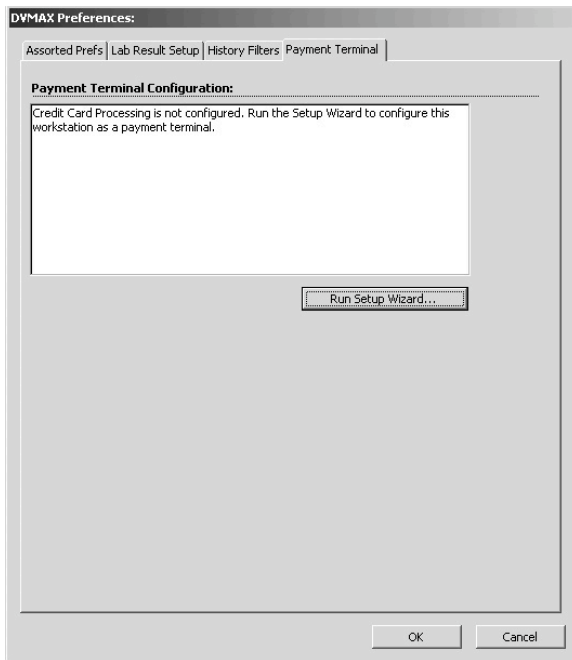
- Click **Run Setup Wizard**. A message indicates all existing Payment Terminal information will be overwritten.

- Click **OK** to continue and proceed with Payment Terminal setup or **Cancel** to go back.
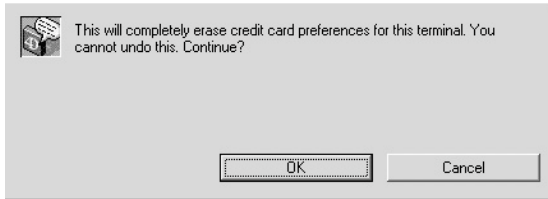
EMV Payment Terminal Setup

The following sections cover set up for EMV terminals. For information on setting up an EMV terminal, see *Non-EMV Payment Terminal Setup.*

EMV Payment Terminal Setup Wizard: Select a Payment Processor

Once you click **Run Setup Wizard** from the Payment Terminal dialog, the Payment Terminal Setup Wizard opens. The first step is to select your payment processor. From the list of options, click the radial button beside the name of the processor used by your clinic.

- If multiple merchant accounts need to be configured, select the **Multiple merchant accounts in this copy of DVMAX** check box. This prevents the Merchant ID, Authentication Key, and Terminal ID from being auto-populated, allowing you to enter per terminal values. Selecting **Multiple Merchant accounts** is particularly useful at a location that needs to have multiple, unique credit card processing accounts, such as might be the case where DVMAX has been installed to a multiple business environment.

- If the **Multiple Merchant** setting is cleared, the Merchant ID, Authentication Key, and Terminal ID will be persistent across terminals. Merchant ID, Authentication Key, and Terminal ID values will then be automatically inserted as the default values in the appropriate fields when the wizard is run on another terminal at your location.

- Only X-Charge merchant accounts can select Use EMV Terminal. If a station will be an EMV Terminal, click **Use EMV Terminal**.

- Click **Next**. Terminal Setup Wizard Step 2 of 8: Account Information page displays.

EMV Payment Terminal Setup Wizard: Account Information

The process of setting up your account information, Step 2 of 8 in the Payment Terminal Setup Wizard, will vary depending on the payment processor you use.

- On the Payment Terminal Wizard Account Information dialog (Step 2 of 8), type your X-Web ID, X-Charge Authentication Key, and X-Charge Terminal ID. You should have received these values from X-Charge.

- In the **OpenEdge EMV Token** field, enter your EMV token. You should have received this value from X-Charge.

- Click **Next**. This will take you to Step 3 of 8, Test the Connection, in the Payment Terminal Setup Wizard, Payment Terminal Setup.

ℹ️ If these values have been provided on another terminal, and if **Multiple merchant accounts in this copy of DVMAX** has not been selected, all but Terminal ID and EVM Token will be pre-filled.

EMV Payment Terminal Setup Wizard: Test the Connection

After the account information has been set up, the Payment Terminal Setup Wizard tests the connection between your payment terminal and the payment processor. A transaction request is made to the appropriate payment gateway, and a particular response expected. No customer or other sensitive information is transmitted.

To test the connection:

- From the Payment Terminal Setup dialog window (Step 3 of 8), click **Test Connection**.

- The **Next** button is enabled only when the expected gateway response is received.

- If the connection test is successful, a message displays in green text that the connection was made and a response received.

- Click **Next**.

If a Test Connection Fails

If the test connection fails, it could mean one of the following:

- There is no internet connection.

- The payment processor host is unreachable.

- You entered correct information, but there is a problem with the payment processor host. Contact Support for your payment processor.

- You entered incorrect information, resulting in an error message. Error messages are displayed in red text.

EMV Payment Terminal Setup Wizard: Test Receipt Printer

The next step in the Payment Terminal setup is to test your receipt printer. To test your receipt printer:

- Your receipt printer will be shown in the **Receipt Printer Type** field. For EMV Terminals, only Epson printers identified in the peripherals section of this chapter are supported.
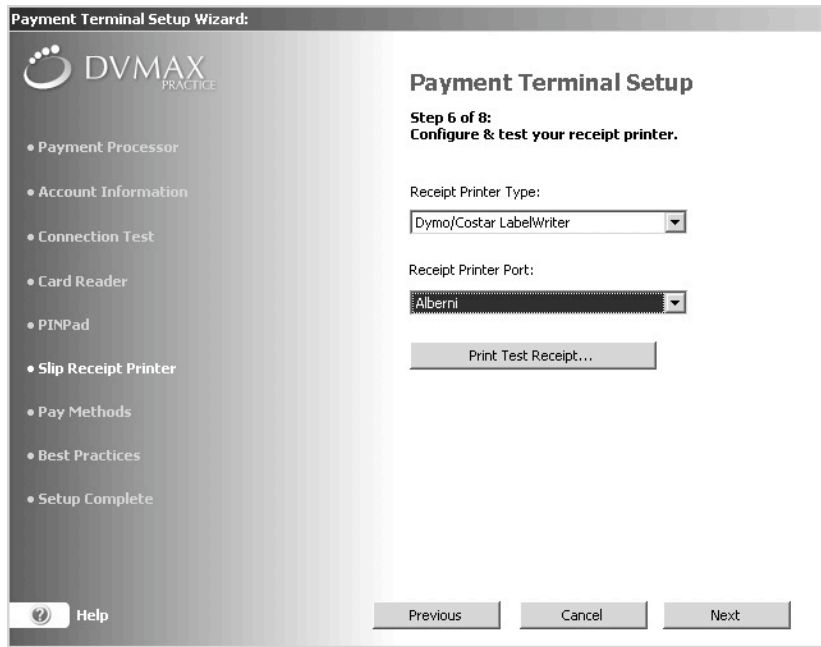
ⓘ The Epson printers are network-based (TCP/IP) and can be used by multiple terminals.

- If an Epson printer is chosen, the **Port** drop-down list changes to a **Receipt Printer IP Address** field. Enter the IP address of your receipt printer in the **Receipt Printer IP Address** field.

⚠ When entering an IP address in the **Receipt Printer IP Address** field, you must supply leading zeros for each octet (for example, the IP address 192.168.1.90 must be entered as 192.168.001.090). For assistance, contact DVMAX Technical Support or visit https://dvmaxb.atlassian.net/wiki/spaces/DP/pages/1179827/Credit+Card+Processing.
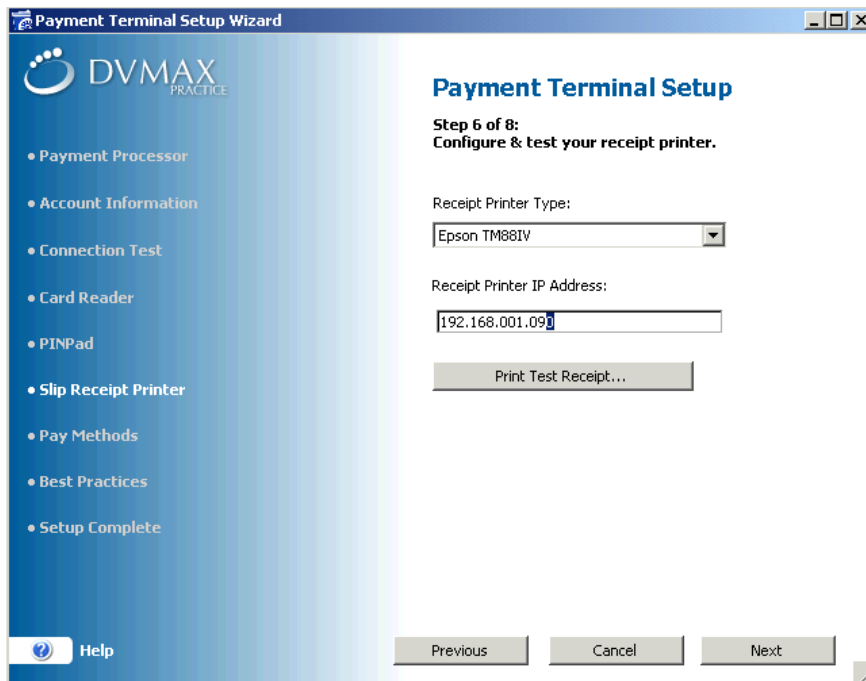
- Click **Print Test Receipt** to send a test receipt to the printer.

- Click **Next**. This takes you to the next step, identifying pay methods.

EMV Payment Terminal Setup Wizard: Create Pay Methods

The next step in setting up credit and debit card processing using the Payment Terminal Setup Wizard is to ensure pay method codes are properly created and ready for use (Step 7 of 8 in the Wizard). To enable payment processing, DVMAX needs to create 2 specially-named pay methods, one for credit card and one for debit card payments. These methods will have the abbreviations "cCard" and "Debit", respectively. These pay method code names are automatically reserved by DVMAX for this purpose, and cannot be in use elsewhere in your DVMAX database. If they are, those existing codes will have to be renamed.

Credit and Debit Card Pay Methods Already Created

It is possible that the "cCard" and "Debit" Pay Methods were previously created via the Payment Terminal Wizard for use by another Payment Terminal at your location**.** In that case, the Credit and Debit Card Pay Methods dialog indicates that the pay methods already exist. Click **Next** to proceed to the next step in setup.

Credit and Debit Card Pay Methods Need to Be Renamed

If your DVMAX database was already using a method named "cCard" or "Debit", but the pay method was not created by the Payment Terminal Wizard for DVMAX credit and debit card transactions, DVMAX will prompt you to rename your existing codes to free up the method names "cCard" and "Debit" for use by the Pay Terminal function.

To rename the existing codes:

- In the Credit Card Code and/or Debit Card Code field, type a new name for the code that needs to be renamed.
- In the Credit Card Description or Debit Card Description field, type a description for the code you are renaming.
- Click **Rename**.
- Once these old codes have been renamed, DVMAX will create the necessary Pay Methods "cCard" and "Debit" for use by the Payment Terminal.
- Click **Next**.

Credit and Debit Card Pay Methods Need to Be Created

If one or both pay methods need to be created:

- From the Credit and Debit Card Pay Methods dialog, click **Create**.

- You will receive a message on the page when the pay methods have been successfully created.

- Click **Next**.

EMV Payment Terminal Setup Wizard: Best Practices Review and Sign Off

The Best Practices dialog provides valuable information on safeguarding the security of the data in your pay terminal and network.

- The Best Practices page opens. Read or review the Best Practices information.
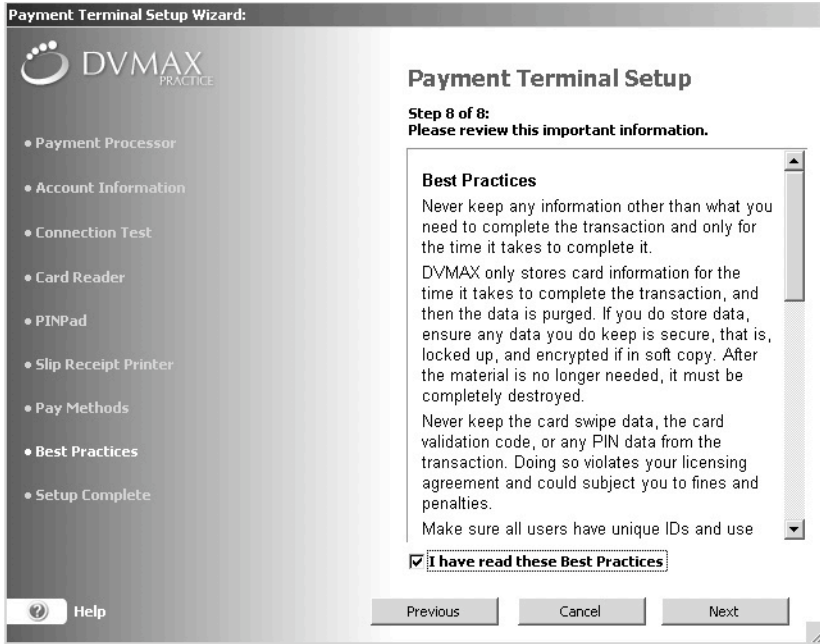
- When you have finished reading the Best Practices information, select **I have read these Best Practices**.
- Click **Next**.

Finish and Close the Payment Terminal Setup Wizard

When you have completed the basic steps in the Payment Terminal Setup Wizard, click **Finish** to close the Setup Wizard.
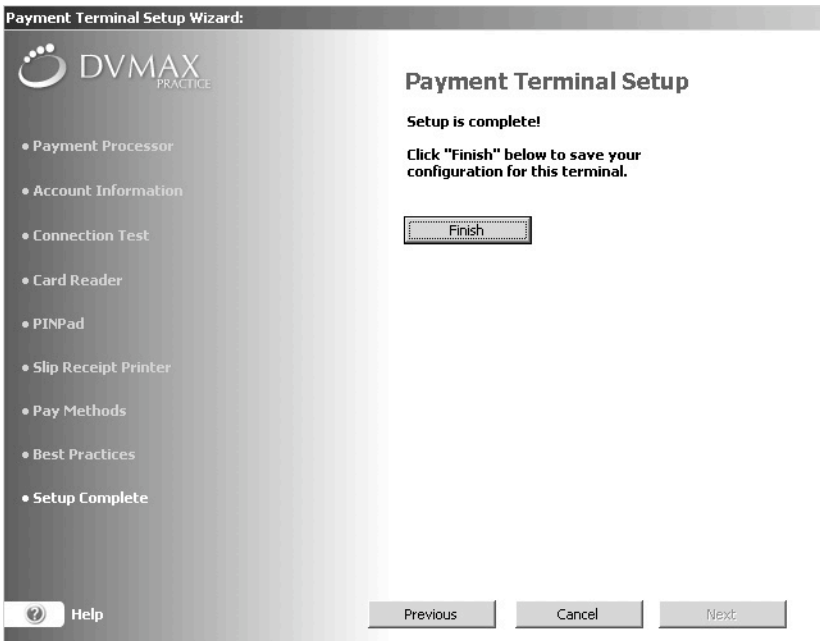
- The Setup Complete page displays. A summary of your Payment Terminal Configuration displays on the Payment Terminal tab of the DVMAX Preferences window.

- Click **OK** to close the window.

```
DVMAX Preferences:

Assorted Prefs | Lab Result Setup | History Filters | Payment Terminal

Payment Terminal Configuration:

Payment Provider: X-Charge
Merchant ID: ********0005
Authorization Code: **************************p8R2
Terminal ID:  ****0005
Card Reader: Unitech MSR120B-33U
Card Reader Port: Halifax
Receipt Printer: Dymo/Costar LabelWriter
Receipt Printer Port: Alberni
PINPad: Verifone Se1000
PINPad Port: Coquitlam

                              [ Run Setup Wizard... ]

                                    [ OK ]   [ Cancel ]
```
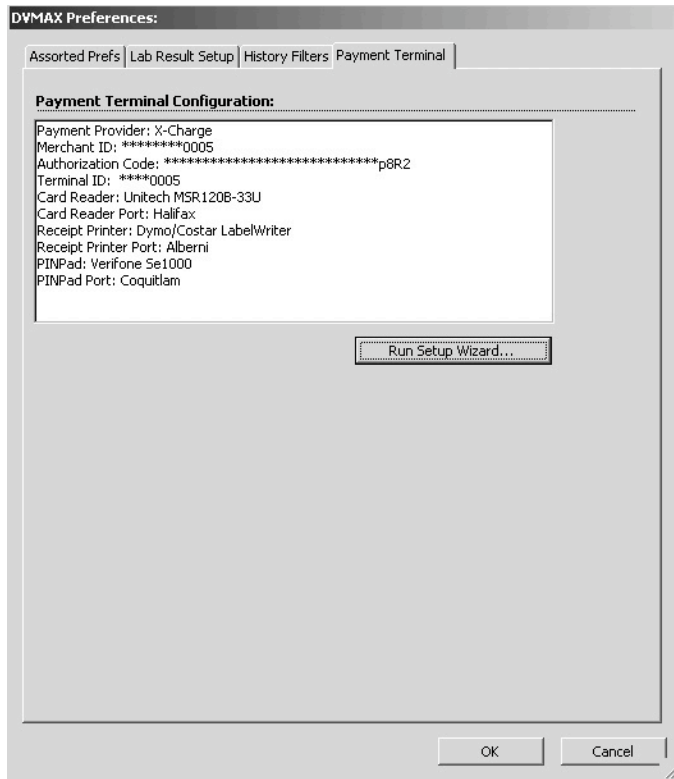
Non-EMV Payment Terminal Setup

The following sections cover set up for non-EMV terminals. For information on setting up an EMV terminal, see *EMV Payment Terminal Setup.*

Non-EMV Payment Terminal Wizard Step 1 of 8: Select a Payment Processor

Once you click **Run Setup Wizard** from the Payment Terminal dialog, the Payment Terminal Setup Wizard opens. The first step is to select your payment processor. From the list of options, click the radial button beside the name of the processor used by your clinic.

- If multiple merchant accounts need to be configured, select the **Multiple merchant accounts in this copy of DVMAX** check box. This prevents the Merchant ID, Authentication Key, and Terminal ID from being auto-populated, allowing you to enter per terminal values. Selecting **Multiple Merchant accounts** is particularly useful at a location that needs to have multiple, unique credit card processing accounts, such as might be the case where DVMAX has been installed to a multiple business environment.

- If the **Multiple Merchant** setting is cleared, the Merchant ID, Authentication Key, and Terminal ID will be persistent across terminals. Merchant ID, Authentication Key, and Terminal ID values will then be automatically inserted as the default values in the appropriate fields when the wizard is run on another terminal at your location.

- Only X-Charge merchant accounts can select Use EMV Terminal. For more on configuring an EVM Terminal, see *EMV Payment Terminal Setup.*

- Click **Next**. Terminal Setup Wizard Step 2 of 8: Account Information page displays.

Non-EMV Payment Terminal Setup Wizard Step 2 of 8: Account Information

The process of setting up your account information, Step 2 of 8 in the Payment Terminal Setup Wizard, will vary depending on the payment processor you use.

X-Charge Customers

- On the Payment Terminal Wizard Account Information dialog (Step 2 of 8), type your X-Web ID, X-Charge Authentication Key, and X-Charge Terminal ID. You should have received these values from X-Charge.

- Click **Next**. This will take you to Step 3 of 8, Test the Connection, in the Payment Terminal Setup Wizard, Payment Terminal Setup.

ⓘ If these values have been provided on another terminal, and if **Multiple merchant accounts in this copy of DVMAX** has not been selected, all but Terminal ID will be pre-filled.

ⓘ If these values have been provided on another terminal, and if **Multiple merchant accounts in this copy of DVMAX** has not been selected, all but Terminal ID and EVM Token will be pre-filled.

Quickbooks Merchant Services Intuit Customers

- On the Payment Terminal Wizard Account Information dialog box (Step 2 of 8), enter the **Connection Ticket**. You should already have received this from Quickbooks Merchant Services (Intuit).

- Click **Next**. This will take you to Step 3 of 8, Test the Connection, in the Payment Terminal Setup Wizard, Payment Terminal Setup.

- If you have not set up your Quickbooks Merchant Services/Intuit account and do not have a connection ticket for DVMAX, you will need to obtain a connection ticket for DVMAX before you can proceed further with the Payment Terminal Setup.
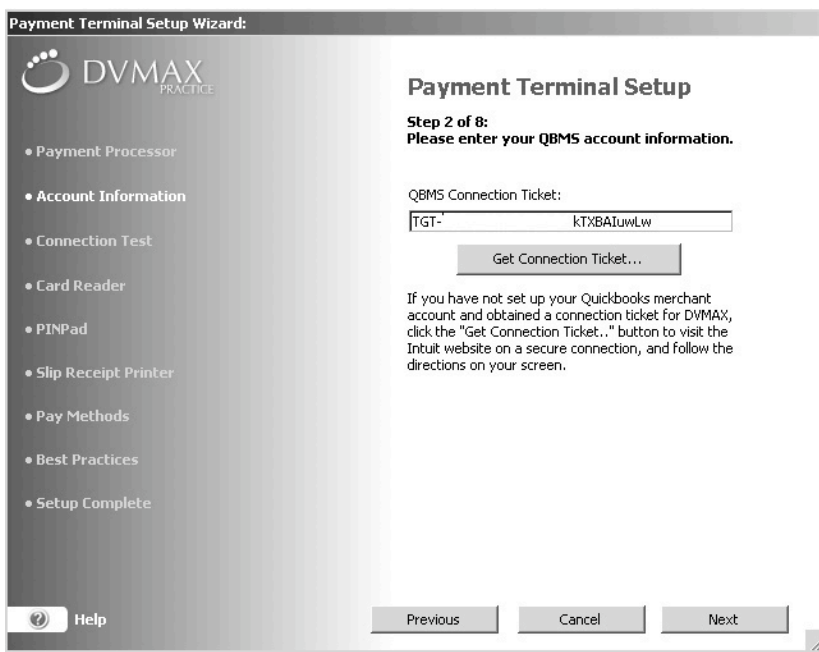
- Click **Get Connection Ticket**. A Confirm dialog box opens. To get a ticket, you will need to visit Quickbooks'/Intuit's Merchant Account website. You must have your Intuit log in details ready, along with the confirmation email you would have received from Intuit.
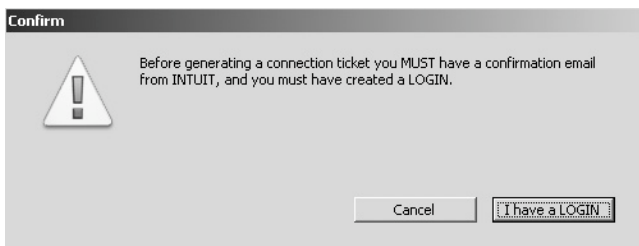
- Click **I have a LOGIN** if you wish to continue.

- Click **Cancel** to quit the installation if you do not have your Intuit Login created and/or have not received a confirmation email from Intuit.

- If you clicked **I have a LOGIN**, a page will display to allow you to log in to your Quickbooks Merchant Services (Intuit) Account. Enter your Merchant Account login details, including **E-mail** and **Password** information, and click **Log In**.

- Follow the directions on the Intuit site to obtain a ticket. Once you obtain a connection ticket for DVMAX, copy this connection ticket to the system clipboard. Return to the DVMAX Payment Terminal Setup Wizard and paste the ticket into the **Connection Ticket** field.
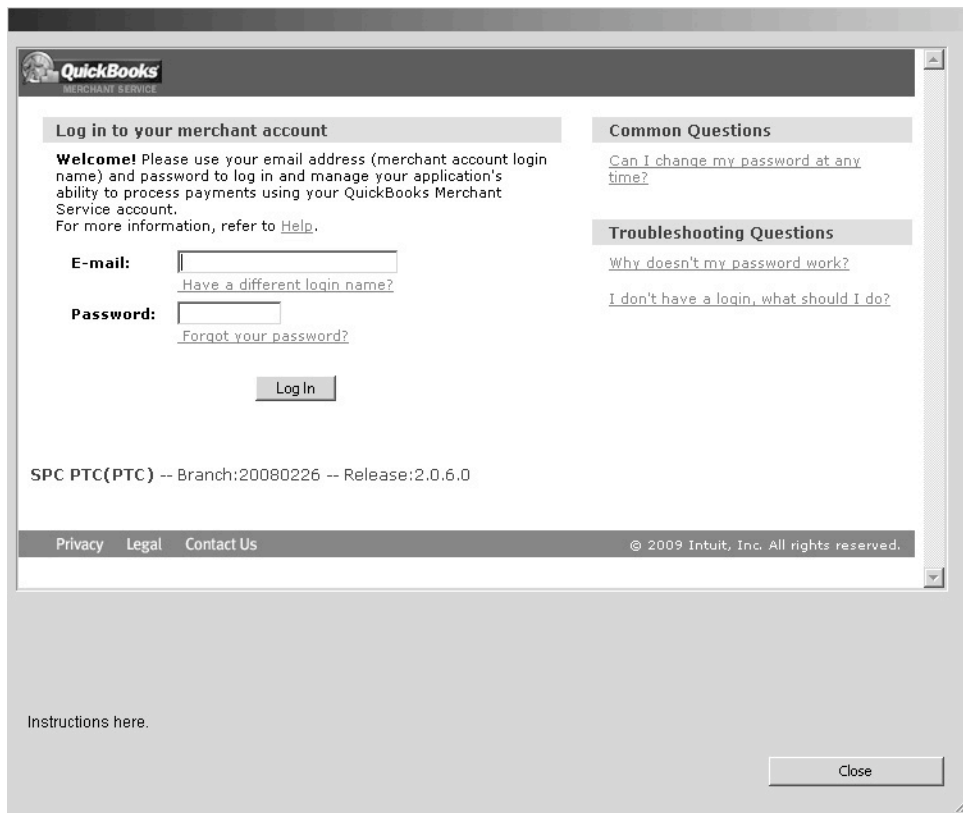
First Data/Rapid Connect Customers

- On the Payment Terminal Wizard Account Information dialog (Step 2 of 8), type your First Data/Rapid Connect Merchant ID, your Datawire Secure Transport ID (DID), your Terminal ID and your Group ID. You should have received these values from First Data/Rapid Connect.

- Click **Next**. This will take you to Step 3 of 8, Test the Connection, in the Payment Terminal Setup Wizard, Payment Terminal Setup.

ⓘ If these values have been provided on another terminal, all but Terminal ID will be pre-filled.

Non-EMV Payment Terminal Setup Wizard Step 3 of 8: Test the Connection

After the account information has been set up, the Terminal Setup Wizard tests the connection between your payment terminal and the payment processor. A transaction request is made to the appropriate payment gateway, and a particular response expected. No customer or other sensitive information is transmitted.

To test the connection:

- From the Payment Terminal Setup dialog window (Step 3 of 8), click **Test Connection**.

- The **Next** button is enabled only when the expected gateway response is received.
- If the connection test is successful, a message displays in green text that the connection was made and a response received.

- Click **Next**.

If a Test Connection Fails

If the test connection fails, it could mean one of the following:

- There is no internet connection.

- The payment processor host is unreachable.

- You entered correct information, but there is a problem with the payment processor host. Contact Support for your payment processor.

- You entered incorrect information, resulting in an error message. Error messages are displayed in red text.

Non-EMV Payment Terminal Setup Wizard Step 4 of 8: Configure and Test Card

The next step in the setup process is to configure and test your card reader. The card reader is optional, and not all payment terminals will necessarily make use of a card reader. *You will not see this step if you are configuring an EMV Terminal.*
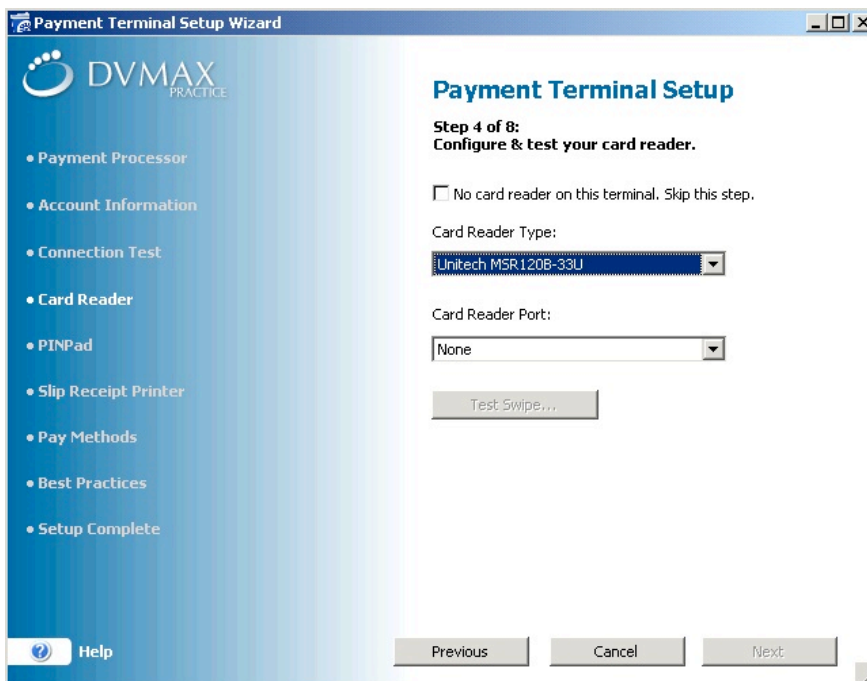
- If your payment terminal does not use a card reader, select **No Card Reader on this Terminal** and click **Next**.

- If you have a card reader on the terminal, select your card reader type from the **Card Reader Type** drop-down menu.

- Select the card reader port from the **Card Reader Port** drop-down menu.

- When your card reader and port have been set, the **Test Swipe** button becomes enabled. To test the card reader, click **Test Swipe**.
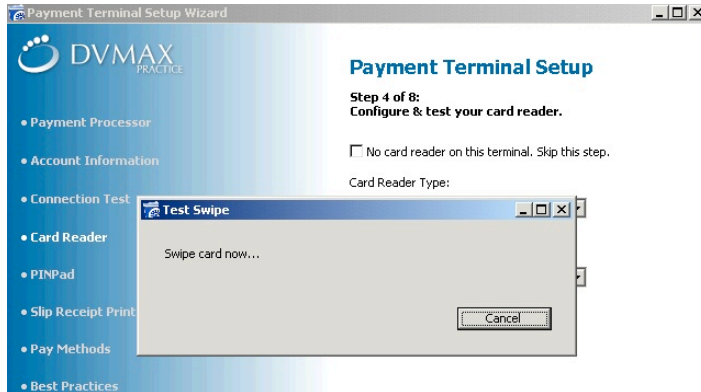
- Swipe the card through the card reader. You should see a message that the card has been read successfully.

- Click **OK**.

- Click **Next**. Step 5 of 8: Configure and Test Your PINPad page opens.

You will not see this step if you are configuring an EMV Terminal.

Non-EMV Payment Terminal Setup Wizard Step 5 of 8: Configure and Test PINPad

If your payment terminal uses a PINPad, the next step in the Payment Terminal setup is to identify and test your PINPad. *You will not see this step if you are configuring an EMV Terminal.*

- If you do not use a PINPad, select **We don't use a PINPad** and click **Next** to move to the next step in the setup process.

- If you use a PINPad for debit card transactions, select the PINPad from the **PINPad** drop-down list. DVMAX supports Verifone SE1000 PINPad.

- Select the port to which the PINPad is attached from the **PINPad Port** drop-down list.

- Click **Test PINPad**.

- The screen on your PINPad should read "DVMAX ONE SWIPE".

- From the Confirm window, click **Yes** if you see the "DVMAX ONE SWIPE" message in the PINPad.

- If you do not see the "DVMAX ONE SWIPE" message on your PINPad, click **No**. Check that all hardware is connected properly to your pay terminal, and try again.
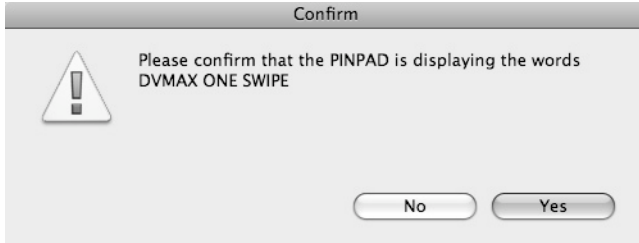
- From the Configure and Test Your PINPad dialog, click **Next**.

Non-EMV Payment Terminal Setup Wizard Step 6 of 8: Configure and Test Receipt Printer

The next step in the Payment Terminal setup is to configure and then test your receipt printer. To configure and test your receipt printer:

- Select your receipt printer from the **Receipt Printer Type** drop-down list.
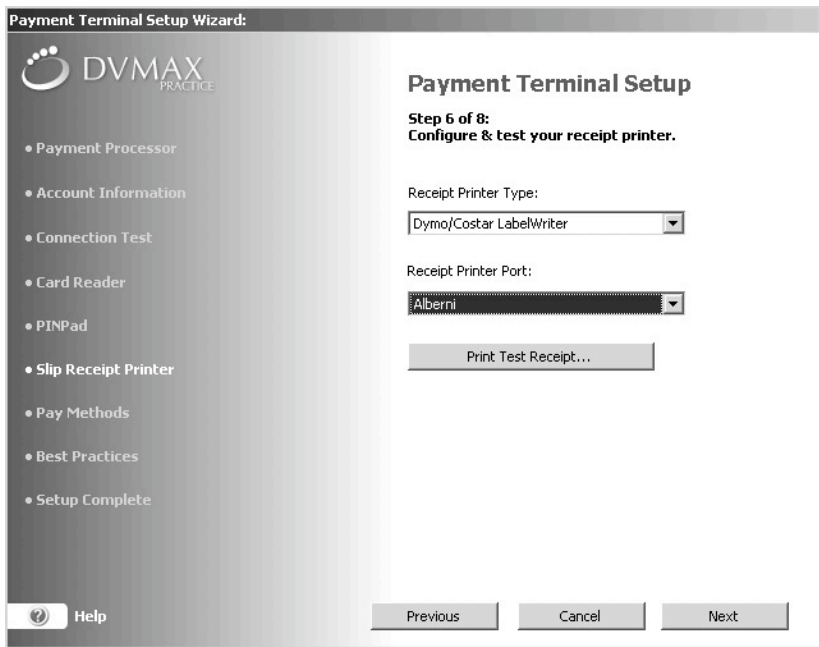
ⓘ The Epson printers are network-based (TCP/IP) and can be used by multiple terminals.

- If a LabelWriter is selected, choose the port the printer is connected to from the **Receipt Printer Port** drop-down list.

- If an Epson printer is chosen, the **Port** drop-down list changes to a **Receipt Printer IP Address** field. Enter the IP address of your receipt printer in the **Receipt Printer IP Address** field.

⚠ When entering an IP address in the **Receipt Printer IP Address** field, you must supply leading zeros for each octet (for example, the IP address 192.168.1.90 must be entered as 192.168.001.090). For assistance, contact DVMAX Technical Support or visit https://dvmaxk-b.atlassian.net/wiki/spaces/DP/pages/1179827/Credit+Card+Processing.
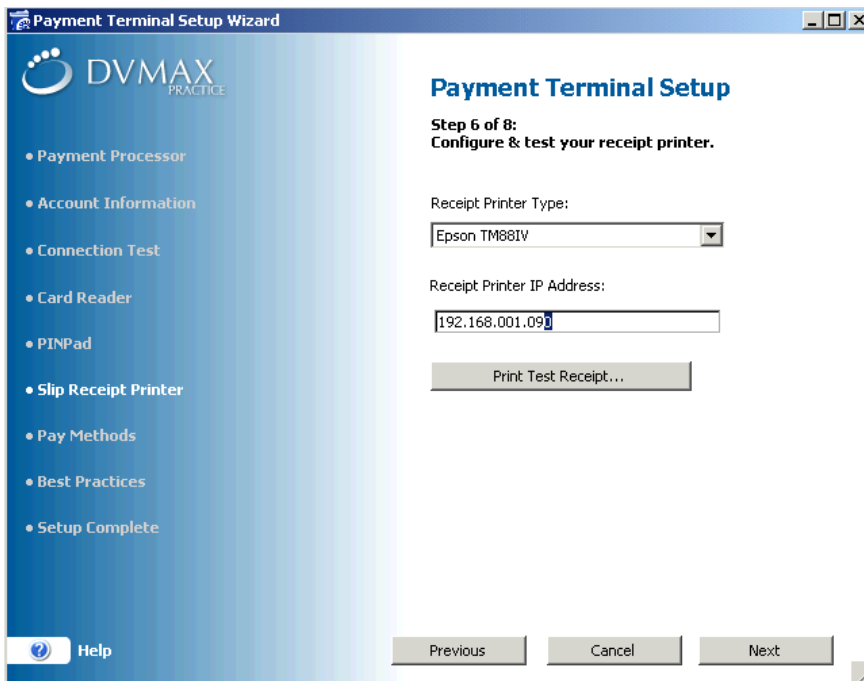
- Click **Print Test Receipt** to send a test receipt to the printer.

- Click **Next**. This takes you to step 7 of 8, identifying pay methods.

Non-EMV Payment Terminal Setup Wizard Step 7 of 8: Credit Card and Debit Card Pay Methods

The next step in setting up credit and debit card processing using the Payment Terminal Setup Wizard is to ensure pay method codes are properly created and ready for use (Step 7 of 8 in the Wizard). To enable payment processing, DVMAX needs to create 2 specially-named pay methods, one for credit card and one for debit card payments. These methods will have the

abbreviations "cCard" and "Debit", respectively. These pay method code names are auto-matically reserved by DVMAX for this purpose, and cannot be in use elsewhere in your DVMAX database. If they are, those existing codes will have to be renamed.

Credit and Debit Card Pay Methods Already Created

It is possible that the "cCard" and "Debit" Pay Methods were previously created via the Payment Terminal Wizard for use by another Payment Terminal at your location. In that case, the Credit and Debit Card Pay Methods dialog indicates that the pay methods already exist. Click **Next** to proceed to step 8 of 8.

Credit and Debit Card Pay Methods Need to Be Renamed

If your DVMAX database was already using a method named "cCard" or "Debit", but the pay method was not created by the Payment Terminal Wizard for DVMAX credit and debit card transactions, DVMAX will prompt you to rename your existing codes to free up the method names "cCard" and "Debit" for use by the Pay Terminal function.

To rename the existing codes:

- In the Credit Card Code and/or Debit Card Code field, type a new name for the code that needs to be renamed.

- In the Credit Card Description or Debit Card Description field, type a description for the code you are renaming.

- Click **Rename**.

- Once these old codes have been renamed, DVMAX will create the necessary Pay Methods "cCard" and "Debit" for use by the Payment Terminal.

- Click **Next**.

Credit and Debit Card Pay Methods Need to Be Created

If one or both pay methods need to be created:

- From the Credit and Debit Card Pay Methods dialog, click **Create**.

- You will receive a message on the page when the pay methods have been successfully created.

- Click **Next**.

Non-EMV Payment Terminal Setup Wizard Step 8 of 8: Best Practices Review and Sign Off

The Best Practices dialog provides valuable information on safeguarding the security of the data in your pay terminal and network.

- The Best Practices page opens. Read or review the Best Practices information.

- When you have finished reading the Best Practices information, select **I have read these Best Practices**.
- Click **Next**.

Finish and Close the Payment Terminal Setup Wizard

When you have completed the 8 basic steps in the Payment Terminal Setup Wizard, click **Finish** to close the Setup Wizard.
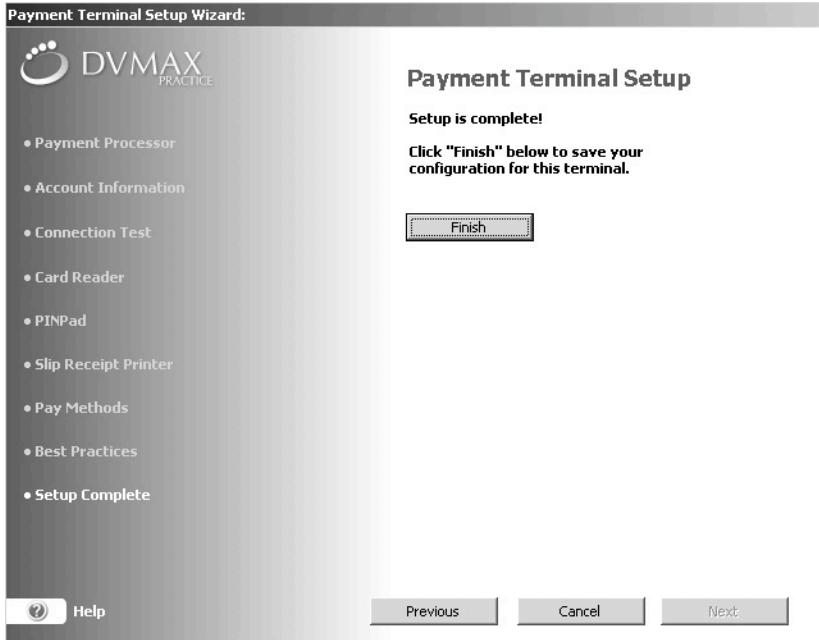
- The Setup Complete page displays. A summary of your Payment Terminal Configuration displays on the Payment Terminal tab of the DVMAX Preferences window.

- Click **OK** to close the window.
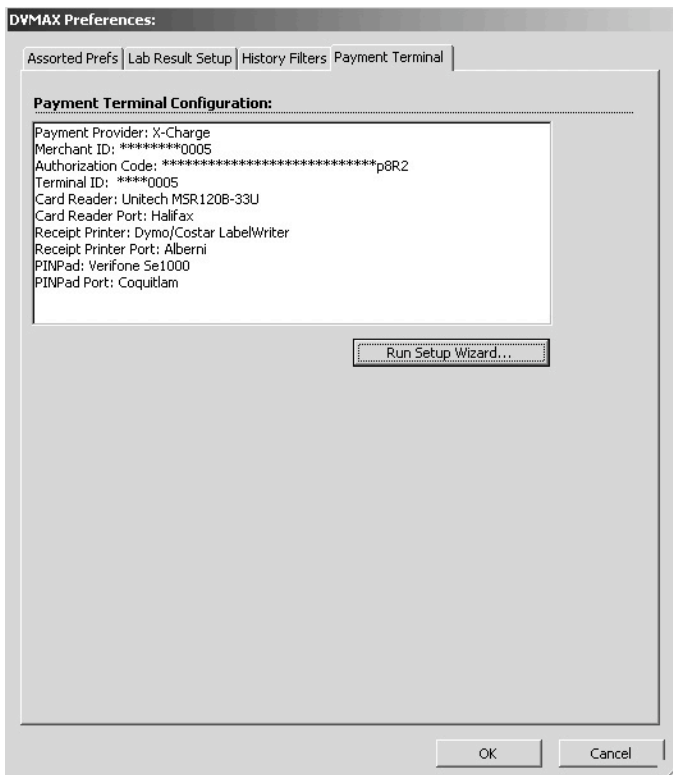
Processing a Credit or Debit Card Payment Using the Payment Terminal

Once you have your payment terminal(s) set up, you are ready to process real-time credit card and debit card transactions within DVMAX, including:

- As payment method on an invoice (see **Invoicing** in the User Guide for more on working with invoices)

- As a deposit method for estimates (see **Estimates** in the User Guide for more on working with estimates)

- As payment method for OTC invoicing (see **Invoicing** in the User Guide for more on working with OTC invoices)

- As a payment method via **Add New Transaction** from the **Client** menu in a client record.

- As a payment method when entering batch payments from **Batch Payments** under the **Special** menu on the DVMAX main screen.

- As a refund method when processing a return (see **Writing Returns** in the User Guide for more on working with returns).

Processing a payment, return or deposit using the integrated credit card feature is nearly identical to using any other pay method in DVMAX, such as cash or check, with the addition of one extra step. When you choose cCard or Debit as a pay method, a **Process Payment Now** button appears beside the Pay Method amount field, and you need to click that button to proceed with the transaction.

Remember, you must configure DVMAX to accept credit and debit card transactions, including running the Payment Terminal Setup Wizard to set up a payment terminal, before you can use the credit and debit card processing functions. Review the steps required in the User Guide under the sections Assign Security Group Access, Configure Your Hardware Peripherals and About the Payment Terminal Setup Wizard for more details.

Processing a Payment from an EMV Terminal

To process a payment using credit card (**cCard** pay method) or debit (**Debit** pay method) from any area in DVMAX that displays the payment transaction:

- From the **Pay Method** drop-down list, select the pay method **cCard** for credit card or choose **Debit** for debit pay method**.**

- The **Process Payment Now** button displays. Enter a payment in the **Amount** field, and click **Process Payment Now**.

- Follow the prompts on the EMV terminal display to Insert, Swipe or Tap the card.

- To run the transaction manually, select the **Manual Entry** checkbox before selecting **Process Now**. This option is not available for Debit transactions.

- For manual input you will be prompted to enter card number, expiry date and CVV.

- If making a transaction that requires the client to enter a PIN number (such as with a debit transaction), present the PINPad to the customer for them to **OK** the purchase and enter their PIN.

- Clicking Cancel on the PINPad cancels the transaction.

Processing a Payment from a Non-EMV Terminal

To process a payment using credit card (**cCard** pay method) or debit (**Debit** pay method) from any area in DVMAX that displays the payment transaction:

- From the **Pay Method** drop-down list, select the pay method **cCard** for credit card or select **Debit** for debit card pay method.

- The **Process Payment Now** button displays. Enter a payment in the **Amount** field, and click **Process Payment Now**.

- If your Pay Terminal is using a non-EMV card reader (which has already been set up under the **Pay Terminal Wizard**), you are prompted to Swipe the card.

- On the Swipe Card Now dialog, swipe the card through the card reader (where applicable).

- To run the transaction manually, select the **Manual Entry** button after selecting **Process Now**. This option is not available for Debit transaction.

- Click **Manual Input** to see the Enter Card Data dialog.
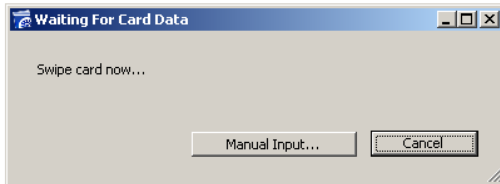
- For manual input, on the Enter Card Data dialog, complete the cardholder information, making sure to enter the **Card Number**, **Expiry Date**, and **CCV**. You will receive error messages if the card number is not in a valid format, or if the expiry date is in the past.

- Click **Submit** to continue and process the payment, or click **Cancel** to go back.

- If making a transaction that requires the client to enter a PIN number (such as with a debit transaction), present the PINPad to the customer for them to **OK** the purchase and enter their PIN.

Processing a Transaction Using Batch Payments

You can use the Batch Payments function to enter a credit card or debit card payment quickly and directly, without having to open the associated client record.

To process a payment using the Batch Payments function:

- From the DVMAX main screen, choose **Enter Batch Payments** from the **Special** drop-down menu.

- On the Batch Payment Entry dialog, type the client name or client ID.

- If you do not know the full client name, type the first letter or letters of the last name, then press <Tab>. Choose the client from the client list.

- Type a pay method code in the **Payment Method** field. When you enter cCard or Debit, the **Process Now** button becomes visible. You must have entered both an amount and an appropriate pay method to have the **Process Now** button enabled.

- Type an amount in the Transaction Amt field. You must have entered both an amount and an appropriate pay method to have the **Process Now** button enabled.

- Click **Process Now**.

- If your Pay Terminal is using a non-EMV card reader (which has already been set up under the Pay Terminal Wizard), you are prompted to **Swipe** the card, with the option of manually entering the card number for a credit card payment. Swipe the card through the card reader (where applicable), or click **Manual Input** to see the Enter Card Data dialog. No manual option is available for debit transactions.

- If you are using an EMV Terminal, follow the prompt on the EVM terminal display to Swipe, Insert or Tap the card, with the option of selecting Manual Input. For manual input, you will need the card expiry date and CVV.

- If no card reader has been set up on your non-EMV Pay Terminal, the Enter Card Data manual input dialog appears automatically.

- For manual input, on the Enter Card Data dialog, complete the cardholder information, making sure to enter the **Card Number**, **Expiry Date**, and **CCV**. You will receive error messages if the card number is not in a valid format, or if the expiry date is in the past. Where available, the client name and details will be prefilled by DVMAX. Click **Authorize** to continue and process the payment, or **Cancel** to go back.

- If making a transaction that requires the client to enter a PIN number (such as with a debit transaction), present the PINPad to the customer for them to **OK** the purchase and enter their PIN.

Failed Transactions at the Processor

If a credit card transaction fails after swiping a card (other than an internet connection failure - see *Internet Failed Transactions*), DVMAX will return a message. The text of the message varies based on your payment processor and reason for transaction failure. You may try running the transaction again, try a different pay method or cancel the transaction.

Internet Failed Transactions

For the case when a credit card payment transaction fails to process because of an internet-related issue (Internet Failed), you will be prompted to store the authorization number to allow the transaction to be completed in DVMAX. The transaction will be flagged as "no online auth" so you can report on this and see which transactions need to be reconciled. The card type is already set correctly, since it is detected from the card number.

If you are processing EMV cards, please contact Open Edge in the case of internet failed transactions.

Voiding Credit Card and Debit Card Transactions

DVMAX allows to you void a credit card and debit card transactions and, where available, have the associated funds automatically returned to the client's card.

⚠️ Depending on your payment processor, you may not be able to void a debit card transaction. In those cases, you will have to use the credit card (cCard) method to issue a refund instead to try to have funds returned to the client's credit card, or issue a refund or return in the same way you would for a cash transaction. If it is not possible to void a Debit transaction (processed using DVMAX's integrated credit and debit card feature), you will get an Alert notice from DVMAX indicating that you cannot perform the void.

For more information on voiding transactions, see the **Invoicing** chapter of the User Guide.

To void a credit card transaction:

- From the Finances tab of the Client record, chose the card transaction you want to void.

- Double click to select the transaction. This opens the Transaction detail dialog.

- From the **Transaction** menu, choose **Void this Entry**.

- A Confirm dialog opens. Click **Yes** to continue and void the entry, or **No** to cancel the action.

- Another Confirm dialog opens indicating that your action will create an entry in the Finance History to show that the transaction was reversed. Click **Yes** to continue or **No** to cancel.

- A third dialog opens to ask if you would like DVMAX to try to return funds to the client's card. Click **Yes** to have funds returned to the client's card. An Alert dialog lets you know if the funds were successfully returned to the client's card. If funds could not be automatically returned to the card, you must issue funds manually.

- Click **OK** from the Alert dialog to close the dialog and return to the Finances tab of the Client record. Note that an entry has been made under the Recent Finances area of the Finances tab to show that a transaction was voided.

⚠️ When you try to void a card payment, DVMAX tries to perform a refund first, then do a return afterward. If both fail, DVMAX lets you know you need to run the void manually. DVMAX assumes you wanted to perform the void regardless of the method, and will post the refund/return transaction as Echg in DVMAX Client Financials to reflect the refund you process.

⚠️ While individual card transactions can be automatically reversed to the client's card, voided invoices that contain debit or credit card transactions do NOT have the option of having those payments auto-reversed and it is not possible to void such an invoice. Those transactions must be

refunded manually. See **Voiding an Invoice that Contains a Credit or Debit Card Transaction** for more information.

Voiding an Invoice that Contains a Credit or Debit Card Transaction

It is not possible to void an invoice that contains a credit card or debit card transaction processed on DVMAX's integrated credit card processing feature using the payment terminal. If you try to void the invoice, a message is displayed indicating that you cannot void the invoice because a debit or credit card payment was accepted on the invoice.   For information on voiding other types of invoices, see the **Invoicing** chapter of the User Guide.

Writing Returns on Credit Card Transactions

Writing a return using the credit card (cCard) or Debit pay methods is effectively the same as writing a return for any other pay method (see *Writing Returns* in the User Guide for more information). When writing a return where funds will be transferred to a client's credit or debit card, choose the appropriate pay method and follow the same process as listed under *Processing a Credit or Debit Card Payment Using the Payment Terminal.*

⚠ Depending on your payment processor, you may not be permitted to perform a return on a debit card transaction. You may be asked to use credit card (cCard) to issue a refund, or perform a return by other pay method. If this is the case, when you select Debit as pay method, you will see an Alert message noting that this pay method cannot be used for a return.

Batch Reports (X-Charge Only)

DVMAX offers a batch inquiry function for X-Charge users, where an automatic end of day report compares the totals in DVMAX with the totals in the XML report from X-Charge.

To view the XCharge/DVMAX EOD Comparison report:

- From the **Section** menu, select **General Management**. The Management Functions dialog opens.
- Click the Financials tab.
- Select **XCharge/DVMAX EOD Comparison** and click **OK**.
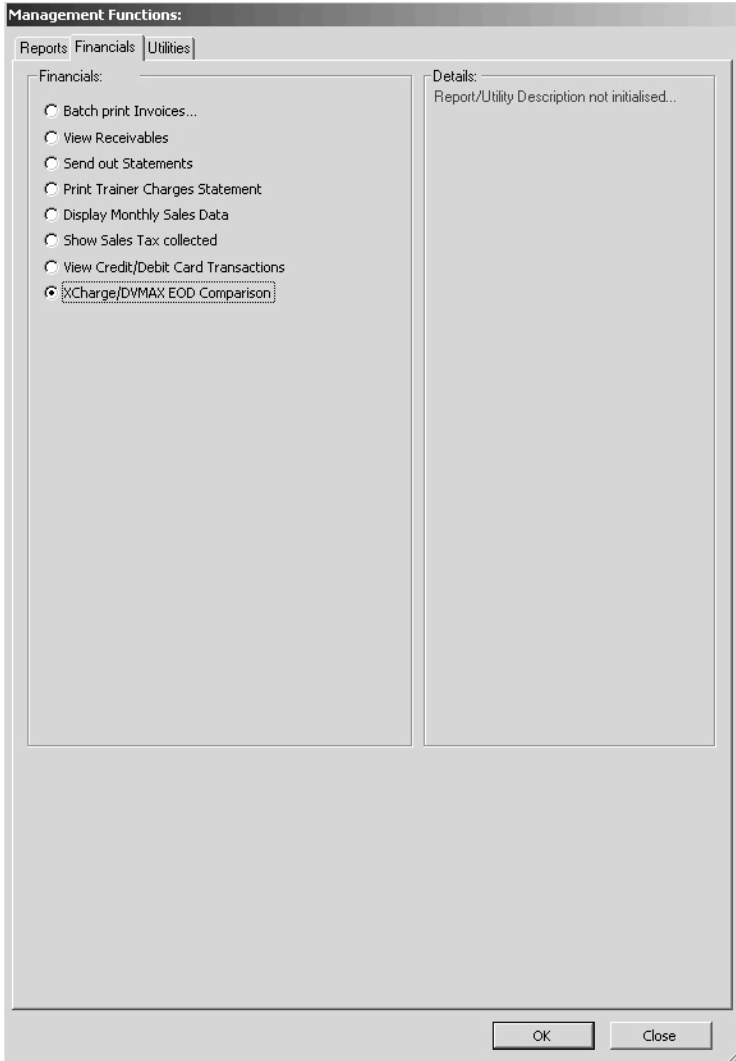
- The XCharge/DVMAX EOD will be displayed.

Batch Settlement/Batch Close

DVMAX offers a batch settlement option, but the feature is dependent on whether your payment processor offers a Batch option.

DVMAX normally closes the batch at a set time daily, as determined by the payment processor. This is the most common (and recommended) option. Users can force a settlement (batch close) of the open batch at the payment processor. This is typically only recommended for clinics with 24hour operation. To force a settlement:

- From the **Section** menu, select **General Management**. The Management Functions dialog opens.

- Click the Financials tab.

- Select **Release Current Open Batch for Settlement** and click **OK**.

- If batch closes successfully, DVMAX will display a notice on the screen indicating a successful close and a Batch Close report will print from the receipt printer.

Accessing the Intuit Merchant Service Centre from DVMAX

Intuit Quickbooks users can securely access the Quickbooks/Intuit Merchant Service Centre from DVMAX at any time.

To access the MSC:

- From the **Section** menu, select **General Management**. The Management Functions dialog opens.

- Click the Financials tab.

- Select **Intuit Quickbooks Merchant Service Centre** and click **OK**.

- The MSC secure webpage will open in your browser.

Credit and Debit Card Transaction Logs

DVMAX logs all incoming and outgoing credit and debit card transaction requests. DVMAX audit logs are automatically enabled, and cannot be disabled. These logs can be exported and then purged. For Batch Close users, the amount of the closed batch will be reflected in the log as well.

To view the Credit and Debit Card transaction log:

- From the **Section** menu, select **General Management** and go to the Financials tab.

- Select **View Credit/Debit Card Transactions** and click **OK**.
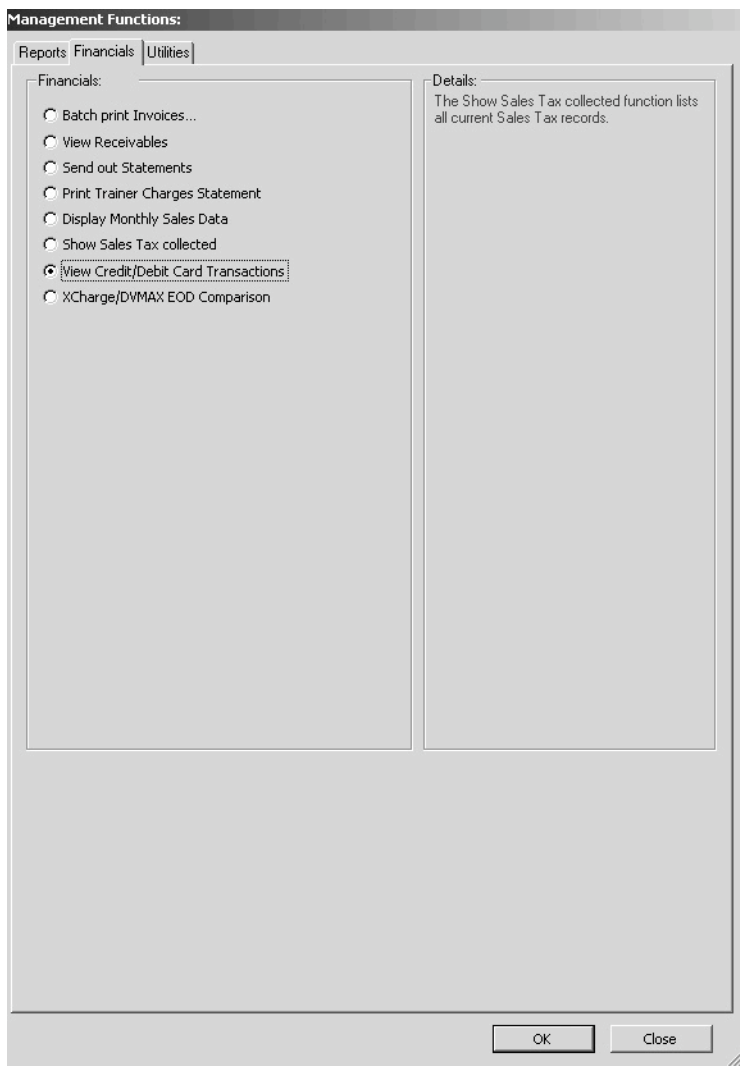
Management Functions:

Reports | Financials | Utilities

Financials:

- ○ Batch print Invoices...
- ○ View Receivables
- ○ Send out Statements
- ○ Print Trainer Charges Statement
- ○ Display Monthly Sales Data
- ○ Show Sales Tax collected
- ● View Credit/Debit Card Transactions
- ○ XCharge/DVMAX EOD Comparison

Details:

The Show Sales Tax collected function lists all current Sales Tax records.

[OK]   [Close]

Custom Reports

Custom Reports are available from the **General Management** -> **Reports** tab and from the **Reports** button on the Command Palette. These reports are web-based; that is, they require an internet connection to generate the report. DVMAX's reporting engine allows custom reports to be sent to clinics independent of release cycle. The reporting engine respects existing DVMAX security and logins. Each report's security is mapped to an existing Practice security group.

⚠️ From time to time, new custom reports are added. *The list provided in this Reports chapter may not cover all existing custom reports.* There is a description of each report included in the list of custom reports. You can review the selection of reports by choosing **General Management** from the **Section** menu of the DVMAX main screen.

ℹ️ The webserver must be running, and you must have a valid IP address.

To verify that the webserver is running:

- Log in to DVMAX as Administrator.
- From the **Section** menu, select **System Constants**. Go to the **User Settings** tab.

- Verify that the Web Server is ON and that there is a valid Port number.
- Close **System Constants**.

About Custom Reports

Custom Reports not only offer a powerful addition to DVMAX's report generating function but the reports offer the data in a more presentation-ready layout. Reports are stored in the "customReports" folder in the web folder. Each report is contained in its own folder inside the "customReports" folder. Any patient names in the reports (where applicable) will link to DVMAX Anywhere (see the chapter on *DVMAX Anywhere* for details). This feature will let you click the link and the patient record will open in DVMAX Anywhere. In each report's folder are two files:

- *index.shtml* - this is the report code.
- *Definition.xml* - the report definition. This contains the report's name, security access, and description.

The name of the report and its description appear on the Reports list.

Appointment List By Staff

The **Appointment List by Staff** report shows patient, client and appointment information for selected staff by date range. There are a number of user-selectable options that can be added to the report, such as client phone number and email address, patient species and breed and appointment duration, type and appointment comments. Report columns are configurable and can be exported to Excel.

If you display the report online, you can click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the *DVMAX Anywhere* chapter in the user guide.

Appointment Range Report

The **Appointment Range** report returns Appointments in a range of dates. You can copy the information into Excel to share with third-party vendors. If you display the report online, you can click a patient name link on in the report to open the patient record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the *DVMAX Anywhere* chapter in the user guide.

Appointment Type Count and Sales Report

The Appointment Type Count and Sales report totals appointments by appointment type and roughly estimated sales.

Boarding Report

The Boarding Report shows all patients who visited within the requested date range.

Client Retention Analysis Report

This report gathers client activity based on two user-specified time periods to make comparisons.

Complete Audit Trail Report – All Transactions

The Complete Audit Trail report lists all transactions, broken down by client, for a given time period. All unfinished invoices are included, regardless of specified date.

If you display the report online, you can click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the *DVMAX Anywhere* chapter in the user guide.

Consult Retention Report

The Consult Retention report allows referral practices to determine if patients who visited for an initial consult return to the referral clinic for another visit. It observes retention based on a specific bill code that identifies the initial consult, then looks at Visit records to see if the patient returned. In most cases, the patient typically comes in to be seen once for specific reason and then returns to their primary hospital.

This report requires you to identify all bill codes that are considered "initial consults" in your practice. From the Consult Retention report page, click Report Setup to add the bill codes.

Current Visit Report

The Current Visit Report presents a list of active visits for reference by care staff away from the Front Desk/Waiting Area. The report shows the most recently checked-in visit at the top of the list and is refreshed every 30 seconds. This report is ideal to display on a monitor rather than a paper print out. Click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the *DVMAX Anywhere* chapter in the user guide.

Deleted Appointments Report

The Deleted Appointments report shows a list of deleted appointments for a given date range. If you display the report online, you can click a patient name link on in the

report to open the patient record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the *DVMAX Anywhere* chapter in the user guide.

Detailed Doctor Production Report

The Detailed Doctor Production report allows you to configure and perform bonus calculations by provider. The report gathers information from the Detailed Sales Report, Receivables Report and the Average Invoices per Doctor report. Information about this report is outlined under Report Explanation from the report page. Some setup is required before running this report. Click Report Setup from the report page to identify provider pay rates and percentages.

Detailed Sales Report

The Detailed Sales Report is the standard DVMAX sales report, also available under the main Reports section. It allows you to report on any combination of doctors, time periods and bill items.

Discount Report

The Discount report gathers all undefined discounts (global/default discounts, etc) and reports on them. Separately, it reports on bill item discounts as well and then returns a grand total value. Information about this report is outlined under Report Explanation from the report page. Some setup is required before running this report. Click Report Setup from the report page to identify discount groups.

GL Account Report

The GL Account report makes full use of the GL Account codes in DVMAX. If assigned to Bill items, DVMAX will search for and group sales totals based on GL Account codes. The report can be copy/pasted into Excel and then imported into accounting software like Quickbooks.

Initial Referral Report

The Initial Referral Report provides a comparison of referral numbers between two time periods, broken down by referring DVM, Practice and referral recipient. It allows users to measure impact of marketing efforts.

Invoice to Line Item Comparison Report

Use the Invoice to Line Item Comparison report to find how an adjustable bill item is used on invoices. The output shows the invoice number, the invoice total, whether the queried bill item was used and how much money was associated with it.

Items Sold Detail Report

The Items Sold Detail report gathers financial data and formats it for export as a CSV file type.

MRE Search Report

The MRE Search report gathers medical record entries with a specified code and within a date range and reports on client/patient, medical record code/description and totals them per active doctor or provider.

Multi Site Detailed Doctor Production Report

The multi site detailed doctor production report lets you configure and perform bonus calculations per provider across multiple clinics.

Patient Visits and Revenue Report

The Patient Visits and Revenue report looks over invoices in a date range, and reports on how many Patients were invoiced. As a result, it gives an idea of how many unique patient visits have occurred for a specific provider compared to revenue.

PMP Drug Report

The PMP Drug report is specifically designed to generate logs required for monitoring dispensed, controlled drugs within a state.

Price Increase/Revenue Projection Report

The Price Increase/Revenue Projection report shows the top-selling items in your practice over the last 12 months and what the net increase in revenue would be were you to increase the prices of these items 5%, 10% or 15%.

Rabies Vaccine Report

The Rabies Vaccine report displays or exports information on patients who have received a rabies vaccination within a specified time period. If you display the report online, you can click a patient name link on in the report to open the patient record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the *DVMAX Anywhere* chapter in the user guide.

Recall by Department Report

The Recall by Department report provides a list of recalls broken down by Department.

Recall Reason

The Recall Reason report searches a date range for recalls and their reason, summarized in a compact view.

Referral Line Item Report

The Referral Line Item report gathers invoice line items in a specified date range and category and reports on patient, provider and referral revenue associated with them. This report is meant to be exported.

If you display the report online, you can click a patient name link on in the report to open the patient record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the *DVMAX Anywhere* chapter in the user guide.

Reminder Call Up List Report

The **Reminder Call Up List** reports on all patients due for reminders in a date range, flagging overdue items. Client call up information is provided.

Reminder Compliance Helper

The Reminder Compliance Helper gathers all reminders due in a date range, grouped by reminder type. It will help you track compliance for specific reminder types.

RVL Referral Export Report

The **RVLReferral Export Report** lets you generate a list of all rVetLink referral sources in a format accepted by rVetLink. Running the report will display a list of referral sources and related information on screen, which can then be copy/pasted and sent to rVetLink to aid in the on-boarding process.

Species Revenue Report

The Species Revenue report groups sales totals by species.

Transaction Report

The Transaction report shows all transactions for a given time period. You can report on one or multiple transaction types.

Visit Overview Report

A report on a per doctor basis that estimates average visit duration, wait time and revenue per visit. This report works when using the Visit Check-In and Status features associated with the Appointment Scheduler.

If you display the report online, you can click a patient name link on in the report to open the patient record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the *DVMAX Anywhere* chapter in the user guide.

Generating a Custom Report

- Click the **Reports** button on the **Command Palette**, or choose **General Management** from the **Section** drop-down menu and click the **Reports** tab. The **Report List** appears.

- The Standard and Custom report lists display. Double-click the report in the Custom list you want to generate.

- Type the requested information such as Start Date and End Date in the appropriate fields.

- Click **Generate Report**.

- The report opens in a new browser window

- Where applicable, when you display the report online, you can click a patient name link on in the report to open the patient record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the *DVMAX Anywhere* chapter in the user guide.

- Report Setup may be required. If that is the case, you will see a **Report Setup** menu option on the Report page. Click **Report Setup** and complete the requested details.

- Some reports offer additional details about the report under a **Report Explanation** link from the specific Custom Report page.
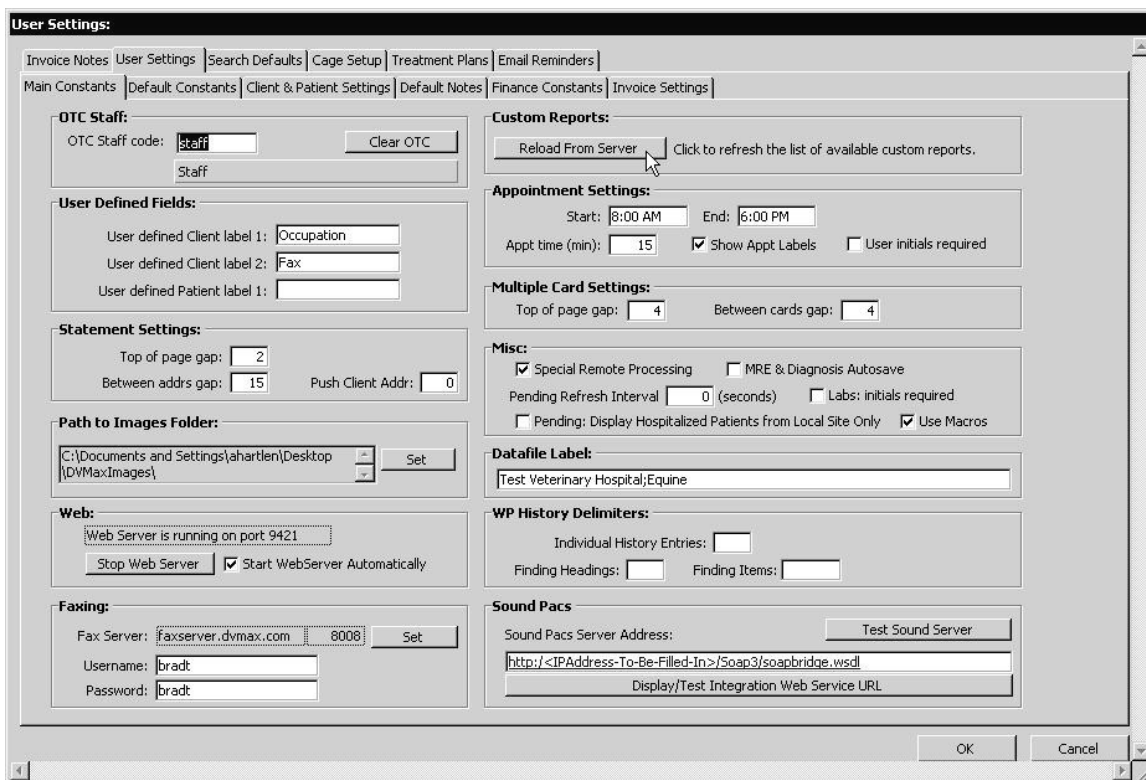
Adding a New Custom Report to the Custom Report List

When a new report is received (typically by e-mail from your DVMAX Technical Support team), you must place it in its proper folder.

⚠️ Only alphanumeric codes and the underscore character can appear in the XML element definitions.

To add a new custom report:

- From the **Section** menu, select **System Constants**. Click the **User Settings** tab. In the Custom Report section, click **Reload From Server**.

Custom Reporting Security Access

You can restrict access to a specific group by adding the group name to the "Access" parameter in the XML file. Separate multiple groups with commas.

⚠️ When upgrading to a new version of DVMAX take care to preserve the contents of the Custom Reports folder.

Department Records

DVMAX uses Department records to identify the various service and/or product divisions in the practice and make them available for associating with recalls, staff and invoice line items. As well, some reports include breakdown by Department, like the End of Day Transaction report. By default, DVMAX has only one Department record, Clinic Name, and this record is used anywhere Departments are employed. To take full advantage of the Departments feature, you will need to create Department records, then assign Departments to Staff records, as desired.

Viewing All Department Records

To see a list of all Department records:

- Choose **Patient Codes** from the **Section** drop-down menu on the DVMAX main screen.

- The **Find** window opens. Select **Departments** from the **Search For** drop-down list.

- Click **All Records**.

- A list of all **Department** records displays.

Finding a Department Record

To find an existing Department Record:

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

- The **Find** window opens.

- Select **Departments** from the **Search For** drop-down list.

- From the **By** drop-down list, choose **Department Name** or **General.**

- **Department Name** will locate the Department name(s) matching the text you type. **General** lets you run a custom search. See the chapter on **General Searches** for more information.

- Type a **Department Name** into the box below the **By** drop-down list. If you do not know a complete code or are unsure of the spelling of a Department name, type as much as you know.

- Click **Search**. If there are multiple records matching your search criteria, DVMAX will present them in a list. To view a Department record, double click it.

- If there is a single match for your search criteria, DVMAX will open the record.

- If there are no matches for your search, DVMAX will present an Alert dialog indicating no matching records were found.

- Click **OK** in this dialog to return to the **Find** window and search again.

Creating a New Department Record

To create a new Department Record:

- From the **Section** drop down menu, select **Patient Codes**.

- From the **Find** dialog, select **Department** from the **Search For** menu.

- Select **Add New** to create a new Department record. A new Department record dialog opens. Alternatively, click **Add New** from the **Department** menu on the menu bar at the top of the DVMAX main screen.

- Type a name for the Department in the **Department Name** field.

- Click **OK** to save the new record.

Modifying or Editing a Department Record

To edit a Department record:

- From the **Section** menu, select **Patient Codes**.

- From the **Find** dialog, select **Department** from the **Search For** menu.

- Use the search features to identify the record you wish to modify or select **All Records** to see a list of all Department records and then select the record you want to modify from the list presented.

- From the Department record, make the required changes to Department Name and select **OK**.

Deleting a Department Record

To delete a Department record:

- Locate and open the Department record you wish to delete by following the procedure outlined in **Finding a Department Record**.

- Click **Delete** at the bottom of the Department record dialog. DVMAX will ask you to confirm that you wish to delete this record.

- Click **OK**. DVMAX will warn you that deleting this record may affect other parts of the system.
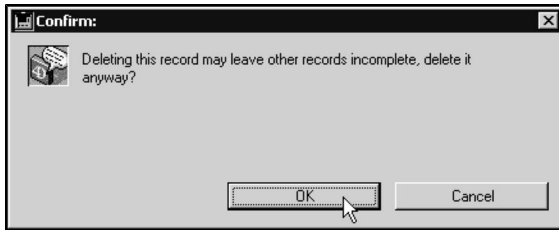
- If you are sure you wish to delete the Department record, click **OK**. Otherwise, click **Cancel** to leave the Department record intact.

Deleting Multiple Department Records

To delete multiple Department records, you must be viewing a list of Department records from which you can then make a selection. To view a list of Department records, follow the procedure outlined in **Finding a Department Record** or **Viewing All Department Records**.

To delete multiple records from the Department records list:

- From the records list, click to select the Department records you wish to delete. Press the SHIFT key while clicking to select multiple adjacent lines. Press the CONTROL key (COMMAND on Macintosh) while clicking to select lines that are not adjacent.

- Choose **Delete Records** from the **Department** drop-down menu at the top of your screen.

- DVMAX will ask you to confirm that you wish to proceed.

- Click **Delete**. DVMAX will warn you that the delete action is permanent.

- If you are sure you wish to proceed, click **Delete**. Otherwise, click **Stop**.

Linking Departments to Staff Records

If your practice uses the Departments feature, you will need to select the department with which you want to associate each staff member. The Department selection will then be used in areas of DVMAX that use Departments, such as line items on invoices.

To define the Department for a Staff record:

- From the **Section** menu, select **Patient Codes**.

- From the **Find** dialog, select **Staff** from the **Search For** menu.

- Use the search features to identify the record you wish to modify or select **All Records** to see a list of all Staff records and then select the record you want to modify from the list presented.

- From the Staff record, select the default Department for the staff record from the **Departments** drop down menu.

- Click **OK** to save the Staff record.

Diagnoses

DVMAX uses Diagnosis records to store and classify possible diagnoses for use on a Patient record. This chapter is about creating and working with Diagnoses records. To learn more about adding a diagnosis to a patient record, see **Add a Diagnosis to Patient History** in the **Working with Patient Records** chapter of this manual. You can place a Diagnosis on a Patient record manually, or DVMAX can place it there automatically when a linked Bill Item is added to an Invoice. See **Invoicing** and **Bill Items** for more information.

Like MRCs, the Diagnosis record can include linked external documents (such as LifeLearn documents) and editable templates that can be attached to the patient record when the Diagnosis is applied. A Diagnosis can also be part of a Finding Class and/or a History Class. See **Findings** and **History Classes** for more information about these topics.

An Overview of the Diagnosis Record

The Diagnosis record in DVMAX consists of a dialog box with 2 tabs: General Information (Diagnosis code, description and notes) and a Documents tab (for linking external documents).
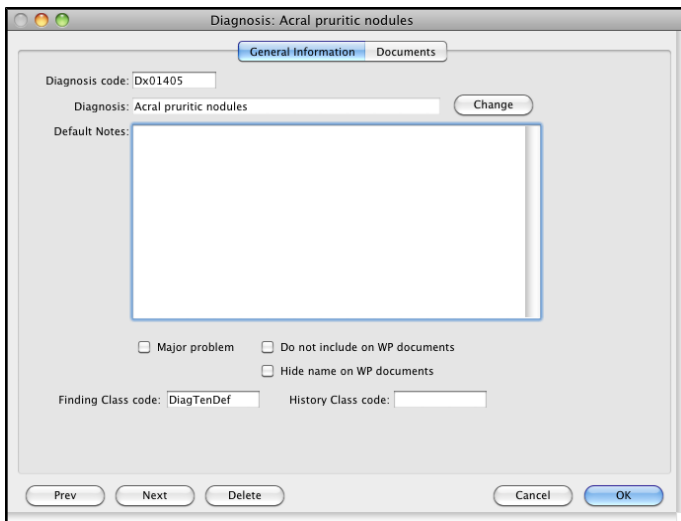
There are also settings that affect how a Diagnosis behaves when placed on a patient record. For full information on Diagnosis record settings, see **Creating a Diagnosis Record**.

Listing All Diagnosis Records

To view a list all Diagnosis records:

- Choose **Patient Codes** from the **Section** drop-down menu.
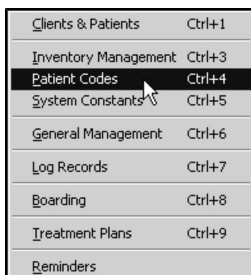
- From the **Find** window, choose **Diagnoses** from the **Search For** drop-down list.
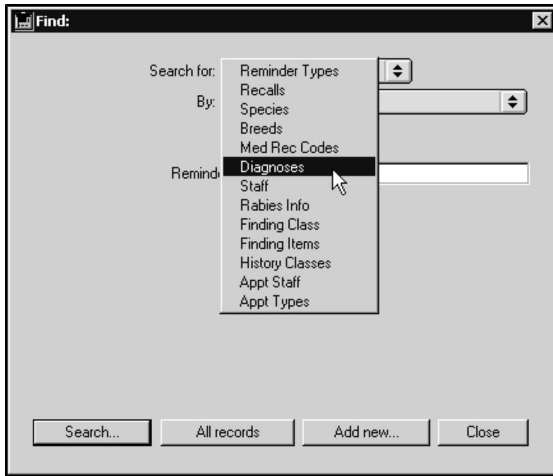
- Click **All Records** at the bottom of the **Find** window.
- The **Diagnoses List** displays, containing all defined Diagnoses in DVMAX.

The Diagnoses List

The Diagnoses list displays one Diagnosis record per line. There are columns for Diagnosis Code and Description.

Opening a Record from the Diagnosis List

- Double click a selected Diagnosis to view the record.

-OR-

- Click to highlight a selected record and click **Show**.

Search from the Diagnosis List

- Click **Search** to run a new **Diagnosis** or other **Patient Codes** search.

-OR-

- Choose **Search** from the **Diagnoses** drop-down menu.
- The **Find** dialog box opens. See the section titled **Searching For and Finding Diagnosis Records** for more detail.

Show a Subset of Records

- Select a set of records from the Diagnosis records list.
- Click **Show** from the Diagnosis records list to display the subset of selected records.

Exclude a Subset of Records

- Select a set of records from the Diagnosis records list.
- Click **Exclude** to hide the group of selected records.

Add a New Diagnosis Record from the Diagnosis List

To add a new diagnosis record from the Diagnosis List:

- Click **Add New** at the bottom of the Diagnosis List.

-OR-

- Choose **Add New** from the **Diagnoses** drop-down menu.
- A new Diagnosis record window opens.

See **Creating a Diagnosis Record** for more information

Creating a Diagnosis Record

To create a new Diagnosis record:

- Choose **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, choose **Diagnoses** from the **Search For** drop-down list.
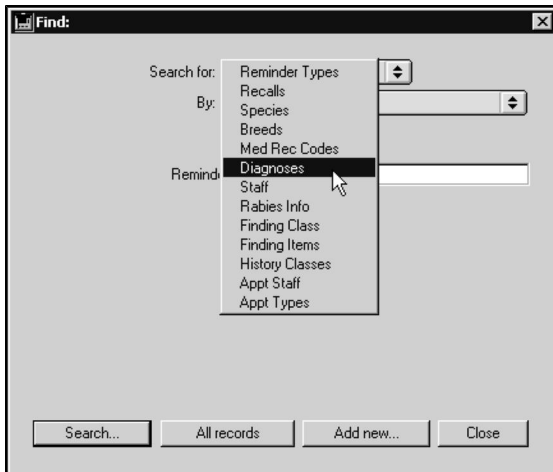
- Click **Add New** at the bottom of the **Find** window.

ⓘ You can also create a new Diagnosis record by clicking the **Add New** button at the bottom of the **Diagnosis List**. See **The Diagnosis List** for more information.

- The **New Diagnosis Type** record window displays.
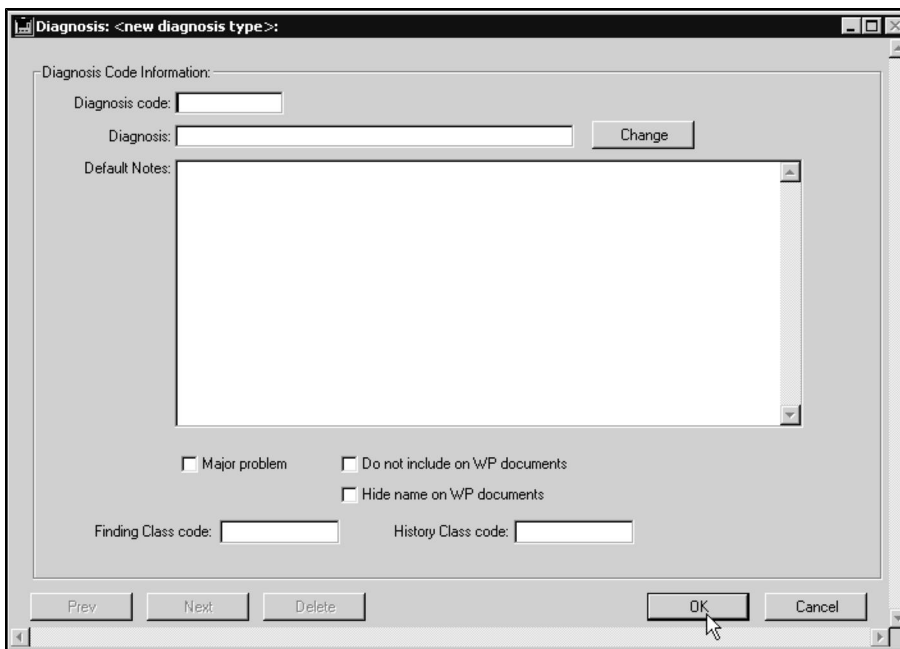
- Type a unique diagnosis code in the **Diagnosis Code** field. This code can be up to 12 characters long.

- Type the name of the diagnosis into the **Diagnosis** field. This will appear on the Patient history and any Word Processing documents that reference this diagnosis.

- Type the text that you want DVMAX to place automatically on a patient's history into the **Default Notes** field. This text will appear in the notes area of the

individual diagnosis entry. You can edit or even delete this text entirely after it has been placed on the patient history.

- Click to select the **Major Problem** checkbox if you want DVMAX to place a copy of this diagnosis in the Major Problems area of the patient record.

- Click to select the **Do Not Include on WP documents** checkbox if you do not wish this diagnosis to be inserted on Word Processing documents. See **Word Processing** for more information.

ⓘ You can override this setting when entering a diagnosis on a patient record.

- Click to select the **Hide Name of WP documents** checkbox if you wish the contents of this diagnosis, but not the name, to appear in Word Processing documents. This setting is useful for inserting comments on the patient record.

- If you want to enter Findings on the patient record with this Diagnosis, type a valid Finding Class Code in the **Finding Class Code** box. See **Linking a Diagnosis to a Finding Class**.

- If you wish this Diagnosis to be included in a History Class, type a valid History Class Code in the **History Class Code** box. See **Linking a Diagnosis to a History Class**.

- If you wish to link this Diagnosis code to an external document or editable template, select the Documents tab and complete the required steps. See **Linking a Document to a Diagnosis**.

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

ⓘ To see a list of **Finding Class** and **History Class Codes**, click in the code field, type the first letter of the desired code and press **TAB**. This will bring up a window listing existing codes.

Linking a Diagnosis to a Finding Class

When a Diagnosis is linked to a Finding Class, Findings associated with the Finding class will be shown and, where applicable, the **Findings Options** button will become available when you enter the Diagnosis on a patient history. This allows you to enter specialized predefined Findings and options for this Diagnosis.

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

Linking a Diagnosis 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 Diagnosis on a patient record is part of a particular History Class, that Diagnosis 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 a Diagnosis

When an external document is linked to a Diagnosis record, the document will display when you enter the Diagnosis 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 a Diagnosis record:

- From the Diagnosis record, click the **Documents** tab.

- From the **Documents** tab, specify the document location for the document you wish to link to the Diagnosis code 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 document. 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 Diagnosis code. 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 Diagnosis code.

- From the **Display** options, select **Upon DX Code Selection** to have the document open when you click to create the diagnosis on the patient record, Choose **Upon DX 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 **Diagnosis** record.

Searching for Diagnosis Records

To find a Diagnosis record in DVMAX:

- Select **Patient Codes** from the **Section** drop-down menu.
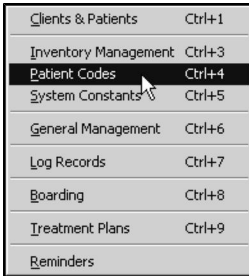
- The **Find** window displays.
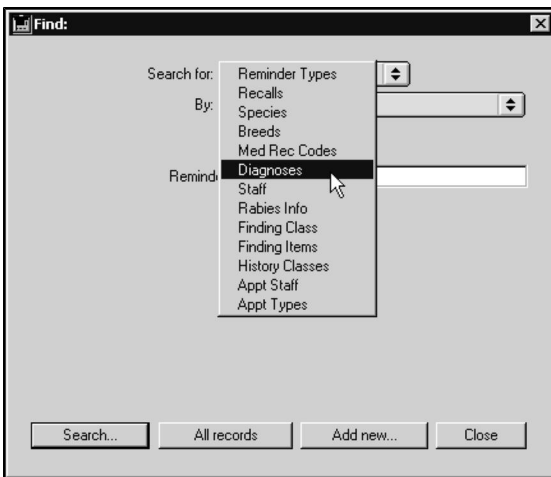
- Click to select **Diagnoses** from the **Search For** drop-down list.
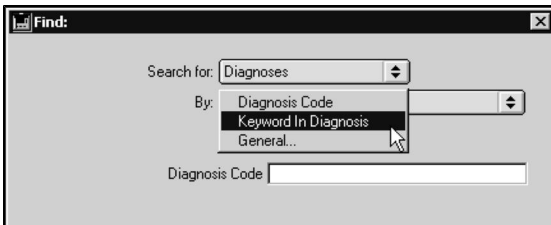
- Choose **Diagnosis Code** from the **By** drop-down list to search Diagnosis records by code.

-OR-

- Choose **Keyword in Diagnosis** to search the description fields of Diagnoses.

- Type a Diagnosis Code or word(s) from a Diagnosis 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 Diagnosis code as you know. If you are searching by description, DVMAX will find all Diagnoses whose descriptions contain the word you type.

- Click **Search**.

- If there is more than one match for your search, the **Diagnosis List** window will appear, containing a list of items that matched your search.

- If there is only one Diagnosis that matches your criteria, DVMAX will open that Diagnosis Record.
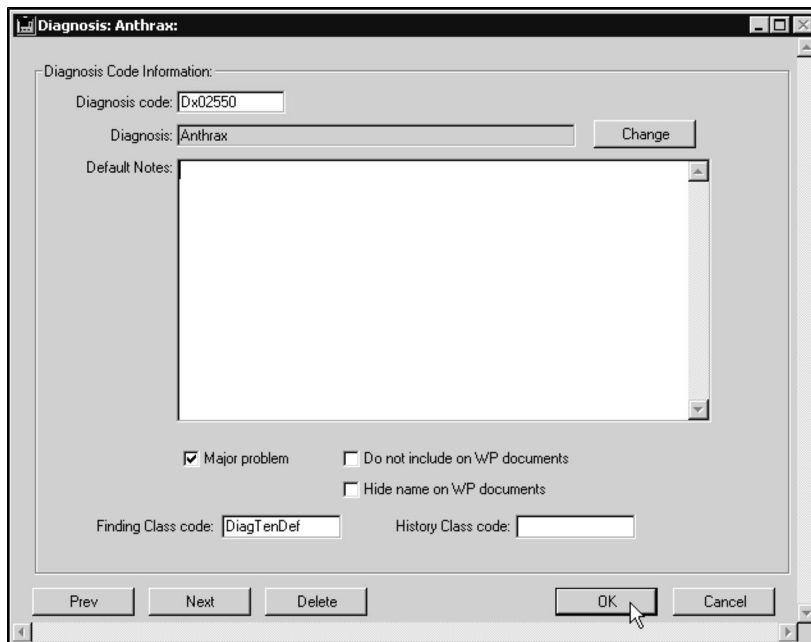
- If there are no matches, DVMAX will display a message to that effect and return you to the **Find** window to search again.

Deleting a Diagnosis Record

To delete a single Diagnosis from DVMAX:

- Find and open the Diagnosis you wish to delete. See **Searching for Diagnosis Records.**

- Click the **Delete** button at the bottom of the Diagnosis window.

- Click **OK** to confirm that you wish to delete the record, or **Cancel** to keep the record.

- DVMAX will ask you to confirm that you are sure you want to delete the record. Click **OK** to continue and delete the record.
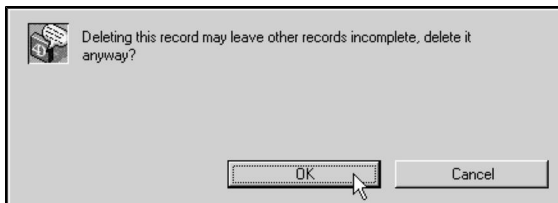
To delete multiple diagnosis records from DVMAX:

- List all Diagnoses (see **Listing All Diagnoses**).

- Click to select the diagnosis records you wish to delete.

ⓘ Press and hold the SHIFT key to select multiple adjacent diagnosis records from the list. Press and hold the CONTROL key (COMMAND on Macintosh) to select multiple non-adjacent Diagnoses.

- Choose **Delete Records** from the **Diagnoses** drop-down menu.
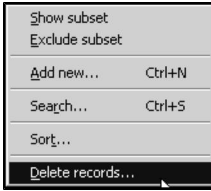
- Click **OK** to confirm that you wish to delete the records, or **Cancel** to keep the record.
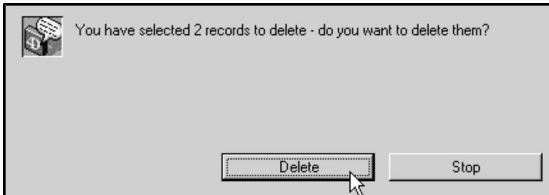
- DVMAX will ask you to confirm that you are sure you want to delete the records. Click **Delete** to continue and delete the records.

⚠ When you delete a Diagnosis, it can affect any Patient record on which that Diagnosis has been placed. The text from the Diagnosis record will remain on the Patient record, but the Diagnosis itself will be marked as invalid in the Diagnosis List on the Patient history. See **Working With Patient Records** for more information.

⚠ Deleting a Diagnosis will also leave incomplete any Bill Items that are linked to the deleted Diagnosis. You should remove the link to the deleted Diagnosis from any Bill Items that used the deleted Diagnosis. See **Bill Items** for more information.

Modifying a Diagnosis Record

You can change any part of a diagnosis record at any time, except for the Diagnosis Code. Patient records on which this diagnosis has been placed will **not** be updated to reflect your changes, with the exception of the Diagnosis Name. If you update the Diagnosis Name, the name will be updated on Patient records which contain the diagnosis.

To update the Diagnosis Name on all records which use this name:

- Click **Change** beside the **Diagnosis** field.
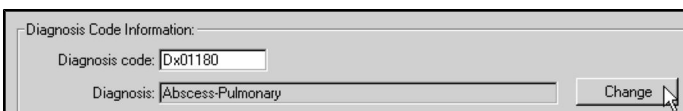
- DVMAX warns you that changing the name may change the name on all patient records containing this diagnosis.
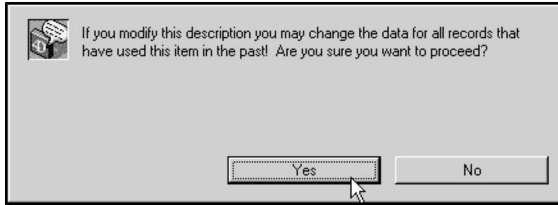
- Click **Yes**.

- Type the new name into the **Diagnosis** field.

- Click **OK** to save the changed Diagnosis.

- Changes made to the **Do Not Include on WP documents** and **Hide Name of WP documents** also take effect immediately.

DVMAXLink DICOM Integration (PurView)

This chapter addresses the setup of DVMAX PACS Link integration, which permits the viewing of diagnostic imaging from DVMAX via Purview (previously known as SecureRAD). With DVMAX version 8.7, a new IDEXX Web PACS functionality has been added to DVMAX for working with imaging, and many DVMAX users will not employ the older PACSLink functionality. For details on IDEXX Web PACS integration, refer to the **Integrations, Requisitions and Lab Results** chapter.

DVMAXLink provides an integrated MWL (modality work list) that takes image requests from DVMAX and passes them on to medical imaging equipment such as X-Ray, Ultrasound, MRI and CT. The resulting images are linked automatically to the appropriate patient record and you can view an image on multiple workstations under DVMAX.

Once you have the DVMAX PACS Link configured, the process is triggered automatically when you create a PACS Link Medical Record Entry on a patient's history. For more information on creating Medical Record Entries, see **Working with Patient Records**.

Configuring DVMAX PACS Link Integration

DVMAX Technical Support will guide you through the process of configuring the DVMAX PACS Link. Configuration will include:

1. Providing DVMAX with the address of the DVMAX PACS Link server.

2. Creating or editing Medical Record Codes in DVMAX containing the **PACS Link** special setting. **You will *not* use the PACS Link special setting if you are using IDEXX Web PACS**.

Entering the DVMAX PACS Link Server Address

⚠ DVMAX Technical Support will assist you in setting up your DVMAX PACS Link and ensuring it is running smoothly. Please contact Technical Support to determine the first steps.

If you do not know your DVMAX PACS Link server address, please contact your network administrator or DVMAX technical support. This setting does not apply to IDEXX Web PACS. Refer to the chapter **Integration, Requisitions and Lab Results** for that information.

To enter the DVMAX PACS Link digital radiography server address:

- Choose **System Constants** 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	
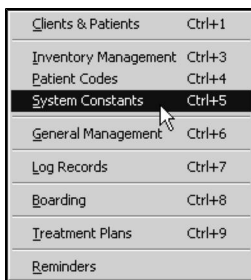
ⓘ CONTROL+5 (COMMAND+5 on Macintosh) is a keyboard shortcut for **System Constants**.

- Click the **User Settings** tab.

-OR-

- Choose **User Settings** from the **System Constants** drop-down menu.

- Type the web address of the DVMAX PACS Link server into the **DVMAX PACS Link Server Address** field in the lower right corner of the **User Settings** tab.

DVMAX PACS Link

DVMAX PACS Link Server Address: Test PACS Link

http://<PleaseCheckAddress>/4DSOAP/
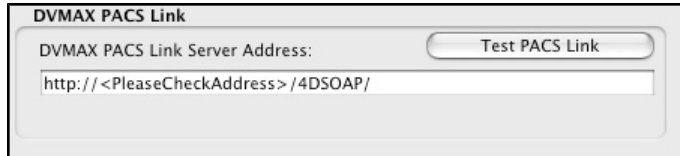
- Click **OK** to save your changes.
- Click **OK** again to exit **System Constants**.

Testing the DVMAX PACS Link Server Setting

You can test your DVMAX PACS Link Server address before you attempt to send an actual working request. To test your Server Address:

- Click **Test PACS Link** on the **User Settings** tab of **System Constants.**

- DVMAX will present a dialog informing you that testing is about to begin. Click **OK** to begin the test.

Alert

⚠ **Testing DVMAX PACS Link connection**
Test will start when you click OK...please be patient

OK
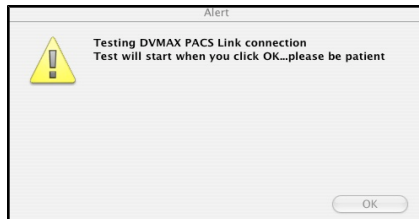
- DVMAX will notify you of the success or failure of the test by noting whether the PACS Link is available (successful test) or not available (failed test).

- If DVMAX is unable to connect to your server, the IP address portion of the PACS Link Server Address previously recorded will be replaced with **<PleaseCheckAddress>**.

Creating Medical Record Codes for DVMAX PACS Link Integration

In order to enable DVMAX PACS Link integration, you must create Medical Record Codes with the **PACS Link Special Setting**. In this way, the DVMAX PACS Link will automatically be triggered whenever a MRE is made using a MRC created with the **PACS Link Special Setting**.

⚠️ Note that the PACS Link special setting is not used for the IDEXX Web PACS provider. The special setting only applies to integration with Purview (SecureRAD). See the **Integration, Requisitions and Lab Results** chapter for IDEXX Web PACS setup.

This section outlines the minimum steps necessary to create MRCs that enable the PACS Link integration. For complete information on creating MRCs, see **Medical Record Codes**.

DVMAX PACS Link MRC Format

Medical Record Codes that work with DVMAX PACS Link integration (for Purview integration) must be created using a specified format. An example of the required format is DXCT45, where DX represents the MRC Category to which ALL PACS Link MRCs are assigned; CT represents the 2-character code for modality type (in this example, CT Scan) and the end of the MRC is a 2-digit number for purposes of distinguishing types of images within your clinic.

Use the following guide to format your MRCs for PACS Link integration:

- The MRC begins with the 2-character Category code that you will use for diagnostic imaging. Select the same Category code for all MRCs with the PACS Link special setting. This is often DX, but your clinic may use a different Category code.

- The next 2 characters *must* be the modality code. These include CT (CT Scan), US (Ultrasound) and CR (X-ray).

- The last part of the MRC will be a unique ID number of at least 2 digits.

- All MRCs must also be given the PACS Link special setting for Purview (previously SecureRAD) integration. (See Creating a Medical Record with the PACS Link Special Setting). Note that the PACS Link special setting is not used for IDEXX Web PACS integration. See the **Integration, Requisitions and Lab Results** chapter for IDEXX Web PACS setup.

Creating a Medical Record Code with the PACS Link Special Setting

To enable DVMAX PACS Link integration, you must create at least one Medical Record Code for each modality you will use, and each MRC must have the **PACS Link** special setting enabled. Note that the PACS Link special setting is not used in IDEXX Web PACS integration. See the **Integration, Requisitions and Lab Results** chapter for IDEXX Digital setup.

To create a Medical Record Code with the PACS Link special setting:

- Choose **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	

ℹ️ CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.

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

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

ℹ️ You can also create a new Medical Record Code by clicking the **Add New** button at the bottom of the **Medical Record Code List**. See The Medical Record Code List in Medical Record Codes for more information.

- From the new Medical Record Code window, type a unique code for this MRC in the **Medical Record Code** field. The format for the code must be as described under the **DVMAX PACS Link MRC Format**. The MRC begins with the diagnostic imaging Category code (such as DX), followed by the **required** 2-character modality code (such as CT, or US) and a unique number code of at least 2 digits. For example, DXCT45, where DX is the category, CT is the code for CT Scan and 45 is the unique numeric ID that the clinic assigned to this particular type of CT image.

- Type a short description of this MRC in the **Description** field.

- Click to place an asterisk (*) beside **PACS Link** in the **Special Settings** list.
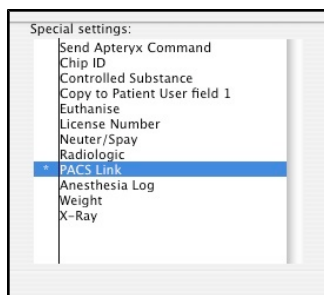
- Click **OK** to save the Medical Record Code.

For more information on the other settings available when creating Medical Record Codes, see **Medical Record Codes**.

Optional DICOM Image Viewing Software

DVMAX PACS Link integration works with Purview (formerly SecureRAD). If you are using IDEXX Web PACS, refer to the **Integrations, Requisitions and Lab Results** chapter. With DVMAX PACS Link, you can view DICOM (Digital Imaging and Communications in Medicine) images directly from a patient record without the need to have any dedicated DICOM viewing software, and you can access the images from any workstation via the patient record.

To edit DICOM images, where applicable, you will need to obtain and install DICOM image viewing software for your computer. Osirix is the recommended choice for software (http://www.osirix-viewer.com). For further assistance, contact DVMAX Technical Support.

Configuring DVMAX PACS Link

Please contact DVMAX Technical Support for information and assistance on configuring your DVMAX PACS Link (for Purview users). It is important to have your DVMAX ID ready when calling Tech Support.

⚠ If you are using DVMAX with IDEXX Web PACS integration, refer to the chapter **Integrations, Requisitions and Lab Results**.

How DVMAX PACS Link Integration Works

In the following example, the Medical Record Code DXCT45 has the PACS Link special setting enabled. Note that the PACS Link special setting is not used for IDEXX Web PACS integration (DVMAX version 8.7). See the **Integrations, Requisitions and Lab Results** chapter for IDEXX Web PACS setup.

1. Creating a Medical Record Entry containing DXCT45 on a patient history will send an imaging request to the DVMAX PACS Link server. The following data is transferred to the PACS Link server:

   - Patient Information:
   - Patient ID
   - Name
   - Date of Birth or Age
   - Sex
   - Breed
   - Species
   - Weight
     - Client Information:
   - ID
   - Name
   - Address (Street, City, State, Postal/Zip code)
   - Email
   - Phone

- Fax

- Alternate phone numbers

  - Exam Information:

- ID

- Vet ID

- Vet Name

- Vet Address (Street, City, State, Postal/Zip code)

- Email

- Phone

- Fax

- Alternate phone numbers

2. When the new image is ready, the image will be automatically link back to DVMAX by the DVMAX PACS Link, in DICOM format.

3. The image can then be viewed directly from the patient record by clicking the WebPACS button. This button is also used by IDEXX Web PACS. If you are using Purview (previously SecureRAD), clicking the WebPACS button on the patient **History** tab will open the image in the same way as clicking the DICOM tab. The DICOM tab has been removed from the DVMAX patient record.

DVMAX Sync (Remote Processing)

DVMAX Sync, which replaced Remote Processing with the release of DVMAX v7.5, is a "one-click" synchronize feature that allows remote terminals and laptop workstations to quickly and confidently update records changed in the field and synchronize their records with data stored on the main DVMAX server.

In this chapter, "main computer" refers to the computer or server at your office or clinic that holds your DVMAX data. "Remote computer" refers to the laptop(s) or computer(s) at satellite locations.

⚠ Be certain to follow all instructions below carefully and in the exact order they appear. Skipping or misunderstanding a step can cause **serious damage to your data.** Working with DVMAX Technical Support in the initial setup of DVMAX Sync is recommended.

Setting Up For DVMAX Sync (Remote Processing)

The following sections will take you through the steps involved in preparing for and setting up DVMAX Sync. DVMAX Sync, introduced with DVMAX v7.5, is an enhanced version of the original remote processing feature. Again, if you have any questions, please contact DVMAX Technical Support.

DVMAX Sync Pre-Setup Checklist

- The DVMAX Server or primary Single User computer must be on a static IP.

- The synchronization takes places over a network, so both the laptops/remote terminals and your main system should be on the same network for the best experience - wired or wireless.

- DVMAX should already be installed and running on all computers. This includes installing DVMAX Single User on the laptops to be used.

DVMAX Sync Step 1: DVMAX Server Setup

⚠ If the 'main' computer is running DVMAX Single User, you do not need to check these settings and you can skip to the next step, *Get a Copy of the Data from the DVMAX Server*.

There should not be any setup necessary on the DVMAX Server, but verify the SQL Server is running.

On the DVMAX Server:

- Click on the SQL Server tab at the top.

- Verify the Status says SQL Server is started. If it is not, click Start SQL

Server.

- Lastly, Quit the DVMAX Server computer in preparation for later steps.

DVMAX Sync Step 2: Get a Copy of the Data from the Server

The next step is to get a copy of the data from the DVMAX Server.

- Ensure the DVMAX Server program is not running.

- On the Remote Station/Laptop, get a copy of the entire DVMAX Data either through copying files over the network, or from a USB Hard drive.

- The DVMAX Server datafile is typically located in C:/DVMAXDatabaseFiles/DVMAXDataFolder/ on Windows, or Macintosh HD:DVMAXDatabaseFiles:DVMAXDataFolder. The exact files to copy **must be** the following:

DVMAX.4DD

DVMAX.4DIndx

DVMAX.4DSyncData

DVMAX.4DSyncHeader

DVMAX.Match

⚠ The exact files to copy MUST BE those listed about. Your files may not have the name 'DVMAX' but should have all the listed extensions.

- Place the copied DVMAX Data into the Data folder on the Remote Laptop, again typically located in: Windows C:/DVMAXDatabaseFiles/DVMAXDataFolder/ and for Macintosh, HD:DVMAXDatabaseFiles:DVMAXDataFolder

- The DVMAX Server can now be launched again, and must be running for the next step.

DVMAX Sync Step 3: Launch DVMAX Remote and Configure

⚠ DVMAX Server must be running for this step.

- Launch DVMAX Single User on the Remote Laptop.

- If this is first time launching DVMAX, you will be given a prompt to select from a few options. Click the **Open** button.

- Navigate to the DVMAX.4DD file you saved on the computer and click **Open**.

- Log into DVMAX as Administrator with no password and click **Connect**.

- Once DVMAX has fully launched, click on the **File** menu and choose **Preferences**.

- Select **Use as a Remote Terminal** if it is not checked already and confirm the change, then click **OK** to exit **Preferences**.

- Go to the **Section** menu and while holding down the SHIFT key, click **System Constants**. From the Advanced Settings Warning dialog, read the warning then click **I understand**.

⚠ Working in the Advanced Settings area of DVMAX is only recommended when in direct contact with DVMAX Technical Support. Be careful to follow directions explicitly.

- Select the **Functions** tab.

- Click the Execute Method button near the top right of the dialog.

- Type in **last rec fix** and click **OK**.

- A "loading data" message will appear several times. Within a minute or two you should be able to close the Advanced Settings window. If you cannot, the procedure is still running.

- From the DVMAX main window, select the **Special** menu and choose **Synchronize**.

- Type in the IP of the DVMAX Server computer, using Administrator for the username, and your correlating password. If your Administrator user does not have a password, leave it blank.

- Click the **Synchronize** button to initiate the first Synchronization between the Laptop and the Server.

- Confirm the choice and wait for Synchronization to complete. The first Synchronization could take anywhere from 5 - 30 minutes. Be patient and let it complete.

⚠ If you receive an error almost immediately after clicking Synchronize, your settings may not be correct. Verify you've entered the right IP, Username, and Password for connecting to your server.

- When the sync process is finished, an alert will appear stating Synchronization complete. Click **OK**.

- The laptop is now ready to be used with DVMAX Sync (remote processing).

Using DVMAX Sync

Using DVMAX with DVMAX Sync enabled is exactly the same as using DVMAX in your main office or clinic. You can use DVMAX with DVMAX Sync enabled for any length of time.

To Synchronize:

- From your laptop or remote terminal, go to the **Special** menu and choose **Synchronize**. DVMAX will first check to make sure that your version of DVMAX is licensed to use this feature.

- Select **Synchronize with Server**.

- Wait for the Synchronization to complete.

- You can be sure Synchronization is successful when you receive the alert stating Synchronization complete.

⚠ If Synchronization is disrupted at any point in time, click **OK** and tell DVMAX to Synchronize again.

Tips for Maximizing DVMAX Sync Performance

For maximum performance, and the best experience, the laptop should be synchronized as often as possible. Since both the Main system and the laptop are trading data with each other, the more frequently it is done, the faster Synchronization will complete.

The System does not need to be shut down to Synchronize. The Laptop can synchronize as many times as you like. Data will not 'duplicate'.

Rules of DVMAX Sync

To ensure the integrity of the data system the following rules exist to provide the best experience for all users.

The Main System Always Wins

If a single file is edited on both the laptop and the main system in the same time frame, the Main system always 'wins' and keeps it's version. For example:

A client phone number is changed on the main computer.

On the same day, the laptop changes the same client's address.

When synchronization occurs, the system will keep the main computer's version of the client file, resulting in the phone number change being preserved, but not the address change. Alternatively, if the main system did not touch the client file at all, then the laptop would successfully update the client's address.

Financials Update on the Main System, Not the Remote Laptop

You can do many things remotely with DVMAX, but 'finishing' invoices is no longer possible. You can still take payments and write full invoice and save them, but all final transactions must be completed on the main system. Once this is done, the laptop will receive the updates through Synchronizing.

ℹ A search for Patients with **Unfinished Remote Invoices** will return a list of all unfinished remote invoices. You can then use the Finish Unfinished Invoices option from Patients menu of

the Patients list to batch finish unfinished invoices. Refer to the Patients chapter for more information.

Emailing Documents

You can use DVMAX to compose and send emails to your customers and referral staff through your default email program. DVMAX can use text from Word Processing documents you generate in Clients, Patients or Referral Sources in the email you send.

Setting Up the Email Functionality

To send an email, the Client or Referral source information must contain a valid, current email address. Your clinic's outgoing and incoming mail servers must also be defined to allow the emails to travel to their intended destinations.

Using DVMAX Email with SSL

⚠ DVMAX supports SSL. Contact DVMAX Technical Support if you are not sure about your email settings or need assistance in setting up the email functionality in DVMAX.

Using DVMAX Email with POP Before SMTP

⚠ Some ISPs require your email setup to provide POP before SMTP. If this is the case, select **Use POP Before SMTP** under the **Email Reminders** tab from **System Constants**. Contact DVMAX Technical Support if you are not sure about your email settings or need assistance in setting up the email functionality in DVMAX.

Updating Client or Referral Source Email Addresses

From a Client or Referral Source record, add the email address in the appropriate field. This will be used as the default email address when you send an email to the client or referral source.

Setting the Mail Servers in DVMAX

To setup the Mail Server:

- Select **System Constants** from the **Section** menu.
- Select the **Email Reminder** tab.
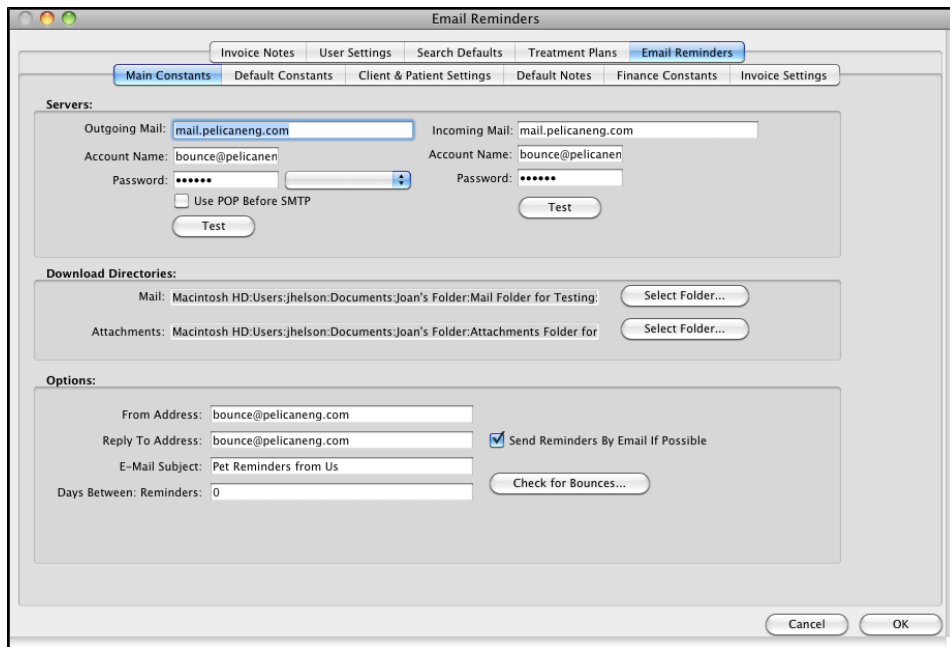
- Within the Server information area add the **Outgoing Mail** server address. This is the server that will process the emails being sent from DVMAX.

- Add the **Account Name** and **Password**.

- Type the **Incoming Mail** server address. This is the server that processes mail coming into DVMAX.

- Add the **Account Name** and **Password**.

- Click **Test** to test the email functionality.

- Select **POP Before SMTP** if this mail configuration is required by your ISP.

Define the Default Mail and Attachment Directories

To define the default mail and attachment directories:

- Select **System Constants** from the **Section** menu.

- Select the **Email Reminder** tab.

- Click **Select** and set the Download directories for mail and attachments.

Specify Your Default Email Settings

To setup you default email address, email subject and reply address:

- Select **System Constants** from the **Section** menu.

- Select the **Email Reminder** tab.

- Specify the default **From Address**, **Reply To Address** and **Email Subject**,

- If you plan to use the Email Reminders feature, specify the default **Days between Reminders**.

- Select the **Send Reminders By Email If Possible** check box if you would like to use email reminders or email statements functions.

- Click **OK** to update this information.

See also *Email Reminders* under the *System Constants* chapter.

Send an Email from a Client, Patient or Referral Source Record

You can send an email directly from a Client, Patient or Referral Source record by clicking the Email icon anywhere it is found on the record. For example, there are three areas on the Patient record that can be used to initiate an email. You can send email:

- To a **Client** by selecting the email icon next to the **Owner** information in **Clinic Information.**

- To **Referral Source #1** by selecting the email icon next to the **Referral #1** entry box in **Clinic Information.**

- To **Referral Source #2** by selecting the email icon next to the **Referral #2** entry box in **Clinic Information.**
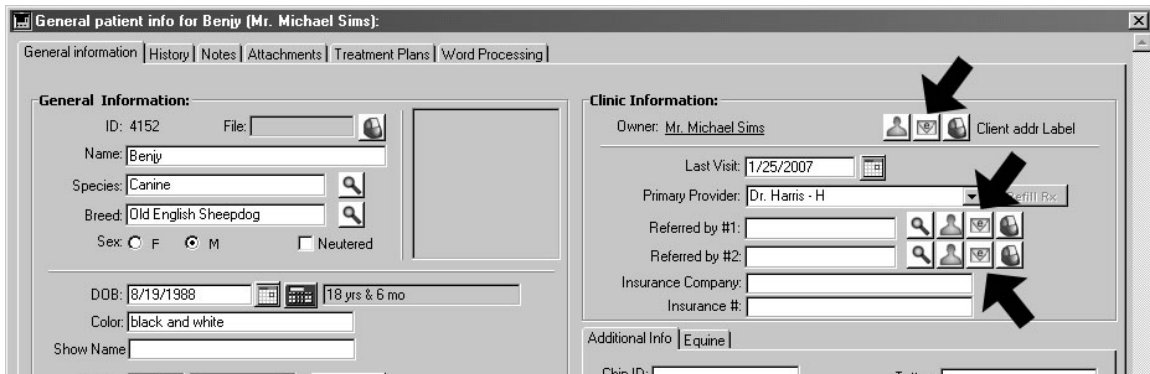
To send an email:

- From a Client, Patient or Referral Source record, click the Email icon beside the name of the person you wish to email.

- If there is not an email address for the person receiving the email you will be asked to provide the email address.

- The default email program used by your system will launch with your clinic information imbedded in the footer of the email.

- Type your note and select **Send**.
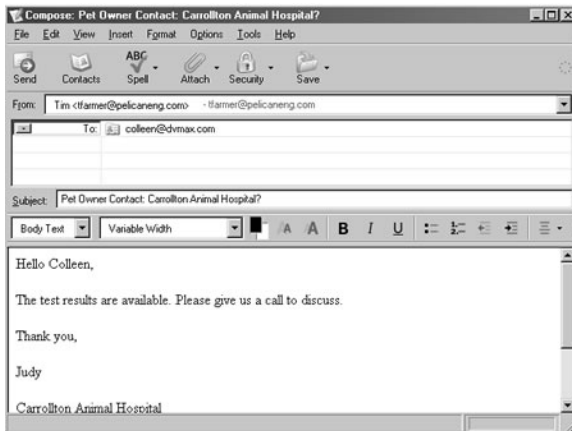
Sending an Email from the Word Processing Area

In cases when your clients are not in the clinic to receive a report or when you need to send documentation to referral staff, you can send the body of your DVMAX generated Word Processing documents with the DVMAX email functions.

To send a Word Processing document by Email:

- Select the Word Processing tab from the Patient, Client or Referral Source record.

- Open a template or blank document and complete the document.

- Select the **Email** icon the bottom right of the Word Processing window.

- If an email address has not been entered to the Client or Referral Source Information you will be asked to enter the destination email.

- The default email window will appear with the body of the Word Processing document embedded in the email.

- Click **Send**.

Estimates

In DVMAX, an estimate is a draft of an invoice that helps a client decide whether to purchase the products and/or services recommended. When the client decides to purchase, you can convert the estimate to an invoice. You can also use an estimate to record a deposit on the client's account.

Unlike invoices, estimates do not affect financial records or medical histories of the clients and patients named on the estimate.
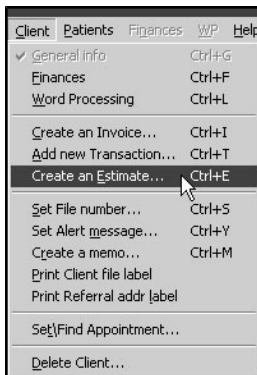
Create an Estimate: An Overview

In order to create an estimate, you must be viewing the record of the client for whom you wish to create the estimate, and that client must have at least one patient. Estimates, unlike invoices, can be created only from a client record.

There are several steps involved in creating an estimate. The steps below are a general overview. For more detailed information on each step, see **About Estimate Data Entry**.

To create an estimate:

- Open the Client record for whom you want to prepare an estimate.

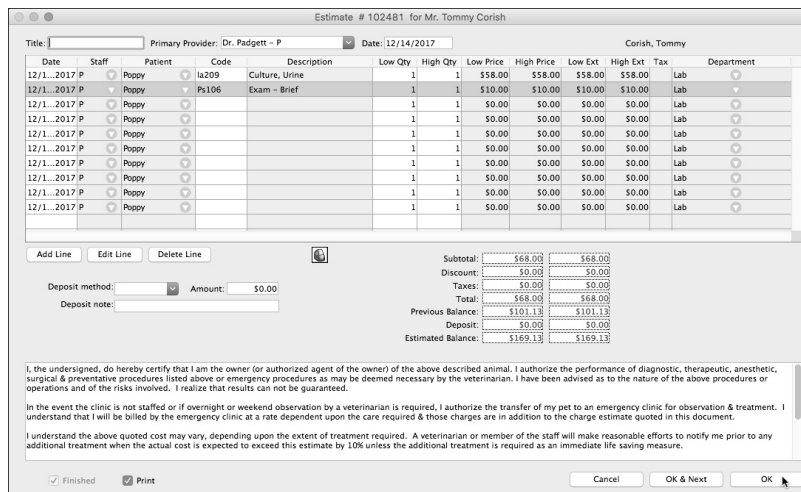- Choose **Create an Estimate** from the **Client** drop-down menu.

- If prompted, choose a Primary Provider for this estimate. The provider you choose will be the default doctor on all lines of the estimate. The **Estimate** window displays.

ℹ️ CONTROL+E (COMMAND+E on Macintosh) is a keyboard shortcut for **Create an Estimate**.

- In the **Title** field, type a title for this Estimate, if desired. The title, if provided, will become part of the Client's financial history on the associated Estimate record on the **Finances** tab of the **Client** record. The **Title** can be up to 80 characters, although a short title is recommended.

- The current date will be in the **Date** field. Type a different date in the date field if needed. The default format for dates in DVMAX is MM/DD/YYYY.

⚠️ If you eventually convert this estimate to an invoice, changing the date here can change the date the invoice will become due, and affect interest you charge your client. For more information, see the **Invoices** chapter of this manual.

- The **Primary Provider** you chose before the Estimate dialog opened will be listed in the **Primary Provider** drop-down list. You can choose a different staff member who will appear by default on all new line items of the Estimate from the **Primary Provider** drop-down list.

- Type the details of the product or service you are estimating in a Line Item row. Include the **Staff** member; the **Patient** this product or service is for, the **Item Code** of the product or service, and the **Low Quantity** and the **High Quantity**. Each product or service uses one line item row. To add a line item row, click **Add Line**.

- The Provider is linked to a Department (see the **Departments** chapter for more information). Each Estimate line item will be associated with the Department of the Primary Provider (Staff) selected. The Department can be adjusted from the **Department** field of each line item by clicking the drop down arrow.

- Record any deposit your client is making in the **Deposit Information** area.

- Type any notes you need in the **Notes** field. The text that is initially in the field comes from **System Constants** (see **The Default Estimate Note** elsewhere in this chapter for details). You can edit this text as needed.

- DVMAX updates the Subtotal, Discount, Taxes, Total, Deposit and Estimated Balance fields automatically as you fill out the estimate. You cannot type anything into these fields. For more information, see the **Payment Information** section of this chapter.

Save an Estimate

To save an estimate:

- By default, DVMAX will print an estimate when you save it. If you do not wish to print this estimate, click to deselect the **Print** checkbox

- Click **OK** to post the estimate and print it (provided **Print** has been selected). DVMAX will return you to the window you were on when you created the estimate.
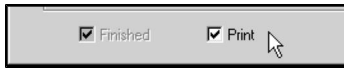
-OR-

- Click **OK and Next** to post the estimate and print it (provided **Print** has been selected). DVMAX will return you to the **Find** window to search for another Client or Patient record.

Print an Estimate

To print an estimate from the Estimate dialog:

- Ensure that the **Print** checkbox is selected before you click **OK**. When you click **OK**, the estimate will be printed.

To print an estimate from the **Client Finances** tab:

- Click once to highlight the estimate you want to print from the **Recent Finances** or **All Finances** area of the **Client Finances** tab.

- Choose **Print Item** from the **Finances** menu.

## About Estimate Data Entry

Estimate Line Items

You record each different type of product or service on the estimate as a line item. If you plan to sell multiples of an item, that sale is a single line item. For example, if there are 2 cans of dog food and one can of cat food, 2 line items will be on the estimate: one for the dog food and one for the cat food.

ℹ️ You can use TAB to move forward between fields in line item rows. You can use SHIFT+TAB to move backward between fields in line item rows.

Completing Line Items on an Estimate

To complete a line item on an estimate:

- If necessary, change the **Staff** on this line item. You can change the staff for a line item by clicking the triangle in the **Staff** field and selecting a different staff member from the drop-down list that displays.
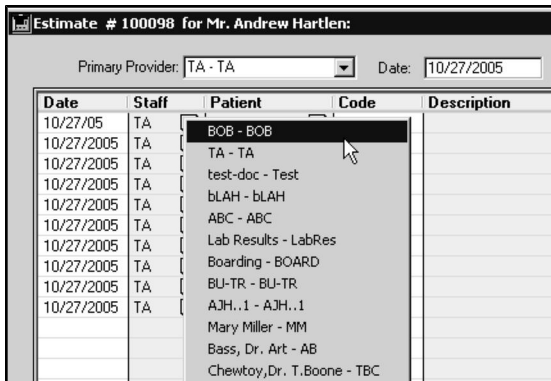

ⓘ The staff member who appears by default on all line items is chosen in the **Default Dr.** drop-down list. See Filling Out an Estimate.

- If necessary, change the **Patient** on this line item. You can change the patient for a line item by clicking the triangle in the **Patient** field and selecting a different patient from the drop-down list that appears.
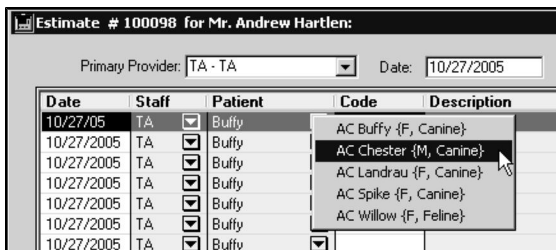
- Type the code of the item being sold in the **Code** field. The **Description** field will fill in automatically and is usually not editable.

ⓘ If you do not know the code for the item you wish to enter, click inside the **Bill Code** field, type in the first character of the code and press **TAB**. This will open a window listing available codes.
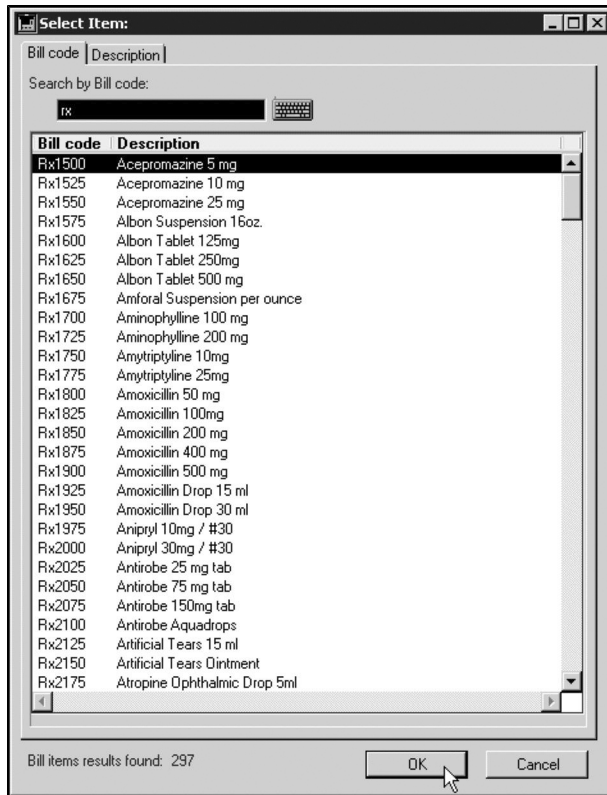
⚠ Some codes have descriptions that you can or must edit. If you enter this kind of code, DVMAX will play an alert sound and move the cursor to the Description field.

⚠ Some codes have prices that you can supply or change. If you type this kind of code, DVMAX will move the cursor to the Lo Price field.

- The **Lo Qty** (Low Quantity) and **Hi Qty** (High Quantity) fields work together to form a possible range of quantities for this line item. Type the quantity that is at the low end of the range in the **Lo Qty** field. Type the quantity that is at the high end of the range in the **Hi Qty** field. If there is an exact quantity for this line item, these two fields can contain the same number.

- DVMAX will automatically fill in the **Lo Ext**, **Hi Ext** and **Tax** fields.

- If necessary, change the department for a line item from the **Department** field. Each staff is linked to a Department (see **Departments** for more). By default, the line items will have the Staff and associated Department of the Primary Provider on the Estimate. You can change the Department for a line item by clicking the triangle in the **Department** field and selecting a different department from the drop-down list that displays.
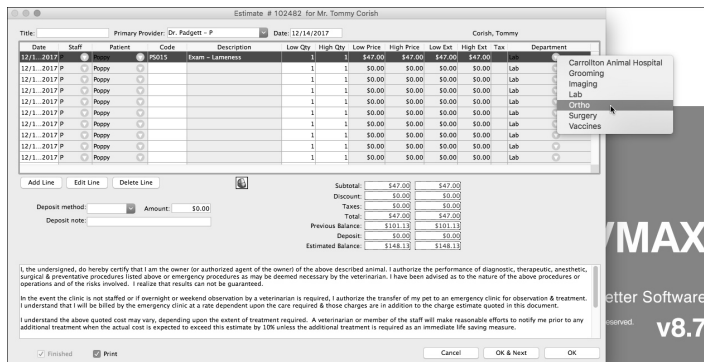
Add Blank Lines to an Estimate

A setting in **System Constants** controls the number of available lines on an estimate. If the default number of lines is not sufficient for your estimate:

- Click the **Add Line** button. DVMAX will create a new blank line and place the cursor in its **Code** field.

For more information on the default number of lines on an estimate, see **System Constants That Affect Invoicing** elsewhere in this chapter.

Removing Empty Lines from an Estimate

If there are more lines on an estimate than you need, DVMAX will automatically remove them when the estimate is printed. Empty lines do not appear on printed estimates, so you don't have to remove unused lines. However, you can use the Delete button to delete an empty line item. See **Deleting a Line Item on an Estimate** for details.

Editing a Line Item on an Estimate

Double-click in the field you wish to edit, and type the new value.

⚠️ Some fields are not editable (Tx, Lo Ext and Hi Ext), and others are not editable most of the time (Description, Lo Price and Hi Price).

Fields dependent on the value you change will update automatically when you enter your new value.

You can also edit a line item by bringing up the **Edit Line Item** window. For more information, see **The Edit Line Item Window**.

Deleting a Line Item on an Estimate

To delete a line item:

- Click once on the line item you wish to delete.

- Click the **Delete Line** button.

The Edit Line Item Window on an Estimate

The **Edit Line Item Window** allows you to make changes that apply to a single line item on an estimate. You must use the **Edit Line Item Window** to apply a discount to a single line item.

⚠️ Not all items are discountable. For more information on discountable items, see the **Bill Items** chapter of this manual.

To open the **Edit Line Item Window**:

- Click in the **Qty** field of the line item you wish to edit.
- Click the **Edit Line** button.
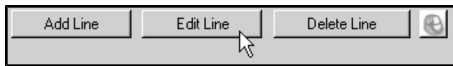
- The **Code**, **Description**, **Lo Qty**, **Hi Qty**, **Lo Price**, **Hi Price**, **Lo Ext**, **Hi Ext** and **Tax** fields function identically to their counterparts on the main Estimate dialog. Make adjustments here as desired. See **Estimate Line Items** for more information.

Changing the Patient on an Estimate Line Item

To change the Patient for this line item:

- Choose the new Patient's name from the **Patient** drop-down menu.
- Make any other changes to the line item or click **OK** to save your changes.

Changing the Staff on an Estimate

To change the Staff for a line item:

- Select the line item you want to edit.
- Choose the new Staff member's name from the **Staff** drop-down menu.
- Make any other changes to the line item or click **OK** to save your changes.

Changing the Department on an Estimate

Department is linked to the default department of the Staff for a line item. To change the Department for a line item without changing the staff:

- Select the line item you want to edit.
- Choose the new department from the **Department** drop-down menu.
- Make any other changes to the line item or click **OK** to save your changes.

Accepting Deposits on an Estimate

Line items on an estimate have no effect on a client's balance; an estimate is merely a tool to help a client decide on a purchase. When a client accepts an estimate, though, your practice may require a deposit before you perform any services listed on the estimate.

DVMAX allows you to enter deposits directly on the estimate dialog.

When an estimate is saved, DVMAX will post any deposit received to the client's financial history.

⚠ A deposit will not appear on a saved estimate should you view it later, but it will appear in the client's past transactions as listed on the client **Finances** tab.

To accept a deposit on an estimate:

- Select a deposit method for this deposit from the **Deposit Method** drop down menu. For more information on accepting payment using DVMAX's integrated credit and debit card processing feature, see **Integrated Credit and Debit Card Processing**.

ℹ If you do not know the code for the payment method you wish to enter, click inside the Code field, type in the first character of the code and press <**TAB**>. This will open a window listing available codes.

- Type the amount of this deposit into the **Amt** field. DVMAX may have automatically entered a payment amount (equal to the client's **Estimated Balance**) in the **Amt** field.

- You can safely replace this number with the amount of the client's deposit, if different. A System Constant controls whether DVMAX automatically fills in a payment amount. See **System Constants That Affect Estimates** elsewhere in this chapter for more information.

- Type any relevant notes about this deposit into the **Deposit Note** field. Deposit Notes will appear on the printed estimate.

ℹ Use the Deposit Note field to record the estimate number, e.g. "Deposit on Estimate #12345." This will make the listing of this deposit on the client Finances tab clearer in the future.
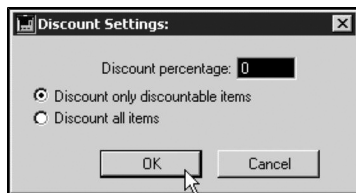
Discounts on Estimates

You can apply a discount to any or all line items on an estimate. Line items that have a discount applied are marked with an asterisk (*) following their description.

If a client has a Default Discount, DVMAX will automatically discount line items on an estimate for this client. You can override this default discount.

Applying a Discount to All Line Items on an Estimate

To apply a discount to all line items:

- Choose **Discount** from the **Estimate** menu on the DVMAX main screen. The **Discount Settings** window appears.

- Type a percentage in the **Discount Percentage** field. DVMAX will discount the price of all items on the invoice the percentage you specify here.

- Select the **Discount All Items** radio button to apply the discount to all items on the estimate. Select the **Discount Only Discountable Items** radio button to have DVMAX apply the discount only to items marked as discountable. For more information on the difference between these settings, see the **Bill Items** chapter of this manual.

- Click **OK** to apply the discount.

⚠️ The **Global Discounting** setting in System Constants controls the availability of the **Discount All Items** radio button. If the **Discount All Items** radio button is not available, you will not be able to apply a discount to line items that are not specified as discountable in their Bill Item setup. For more information, see the Bill Items chapter of this manual, and the **System Constants that Affect Invoicing** section of the **Invoicing** chapter of this manual.

Applying a Discount to a Single Line Item on an Estimate

To apply a discount to a single line item:

- Click in the **Qty** field of the line item you wish to discount.

- Click the **Edit Line** button.
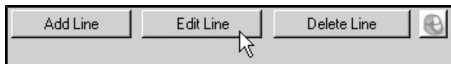
- The **Edit Line Item Window** appears.

- Type the percentage of the discount in the **Discount** field.

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

⚠️ Not all items are discountable. For more information on discountable items, see **Bill Items.**

Editing a Saved Estimate

DVMAX allows you to revise an estimate at any time up until you convert it to an invoice. This allows you to add or remove items as needed to reflect changes that may arise as time passes. Each time you modify an estimate, DVMAX saves it as a new estimate.

ℹ️ DVMAX stores modified estimates as separate items in a client's financial history. This allows you to see the progress of an estimate over time.

To edit an estimate:

- Double click an estimate in either the **Recent Finances** or **All Finances** area of the client **Finances** tab.

-OR-

- Click once on an estimate to highlight it from the list in either the **Recent Finances** or **All Finances** area of the client Finances tab, then choose **View Item** from the **Finances** menu of the DVMAX main screen.

ℹ️ If you prepared the estimate recently, it will appear in the **Recent Finances** area of the Financial Information tab. If some time has passed since you prepared the estimate, it will appear in the **All Finances** area of the Financial Information tab.

- DVMAX will open the estimate and you can now revise it as needed. See the **Filling Out an Estimate** section of this chapter for details on working with the Estimate screen.

- When you have finished making changes to the estimate, click **OK** to return to the **Finances** tab.

- Your newly revised estimate appears as a new line in the **Recent Finances** area. It is titled "Est x, for $y/z (Patient Name)", where x is a unique estimate number generated by DVMAX and y and z are the high and low ranges of the estimate, respectively. **Patient Name** is the name(s) of the patient referred to in the estimate.

Deleting Saved Estimates

You cannot delete an individual estimate from DVMAX. You can, however, delete a group of Estimates that are older than a date you supply.

To delete a group of old Estimates:

- From the **Section** menu of the DVMAX main screen, choose **General Management**. The **Management Functions** screen appears.
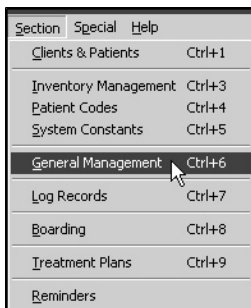
- Click the **Utilities** tab on the **Management Functions** dialog.

- Click to select the **Special Routines** radio button.
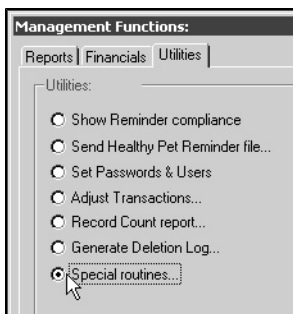
- Click **OK**. The **Special Routines** dialog appears.

- Click to select the **Delete Old Estimates from DVMAX** radio button.

- Click **OK**. The **Estimate Deletion** dialog appears.

- Type a number of days into the **Delete Estimates Older Than** field.

- Click **OK**.

- If DVMAX finds Estimates older than the number you supplied, you will be asked to confirm that you want to delete them.
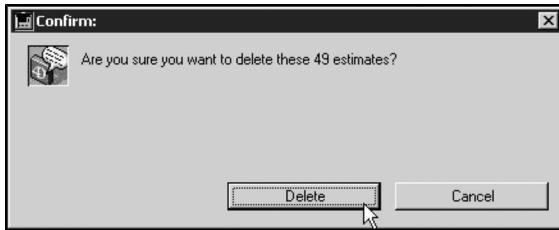
- Click **Delete** to delete the estimates.

⚠ You must have administrative privileges to delete Estimates from DVMAX.

Converting an Estimate to an Invoice

DVMAX makes converting an estimate to an invoice simple. To convert an estimate to an invoice:

- Double click an estimate in either the **Recent Finances** or **All Finances** area of the client Finances screen.

-OR-

- Click once on an estimate to highlight it from the list in either the **Recent Finances** or **All Finances** area of the client Finances tab, then choose **View Item** from the **Finances** menu of the DVMAX main screen.

ⓘ If you prepared the estimate recently, it will appear in the **Recent Finances** area of the Financial Information tab. If some time has passed since you prepared the estimate, it will appear in the **All Finances** area of the Financial Information tab.

- Choose **Convert into an Invoice** from the **Estimate** menu of the DVMAX main screen.
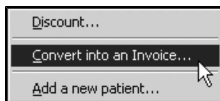
- DVMAX will now ask you if you are sure you wish to convert this estimate to an invoice. Click **Convert** to continue with the conversion, or **Stop** to stop the process and return to the Estimate screen.

- DVMAX will create a new, unfinished invoice containing all the information from your estimate. This new invoice will appear on the screen immediately, in place of the old estimate. You may work with the new invoice as you would any

invoice. For more information on working with invoices, see the **Invoices** chapter of this manual.

- The new invoice will have an invoice number identical to the old estimate number. Line item dates on the new invoice are set to the invoice date (usually the current date).

- Once you convert an estimate to an invoice, the estimate becomes read-only; you will no longer be able to make changes to the original estimate.

⚠️ The **Keep Line Item Providers When Converting EstimatesSystem Constant** controls whether Staff field selections are preserved in the process of converting an Estimate to an Invoice. If the setting is selected, the Invoice's line items will have staff field selections that match those on the originating Estimate. Otherwise, DVMAX forces each line item's Staff field selection to the Estimate's Primary Provider. See the System Constants that Affect Estimates section of this chapter for more information.

⚠️ If you have back-dated an estimate for any reason, this can affect the date an invoice created from this estimate becomes due, and the interest you charge your clients. For more information, see **System Constants That Affect Invoicing in the Invoicing** chapter of this manual.

Adding a New Patient from an Estimate

You can add a new patient to the DVMAX system directly from the estimate. This can save time when an existing client brings a new patient in for treatment.

To add a new patient from the Estimate:

- Choose **Add a New Patient** from the **Estimate** menu. The **Quick Entry For New Patient** dialog displays.

- Provide information for the new patient and click **OK**.
- The new patient is now available for this client.

System Constants that Affect Estimates

Default Estimate Note

The text that initially appears in the **Notes** field of the **Estimate** is controlled by a **System Constant**. To set the default text of the **Estimate Note**:

- Choose **System Constants** from the **Section** menu on the DVMAX main screen.

- Choose **Invoice Notes** from the **System Constants** menu on the DVMAX main screen, or click the **Invoice Notes** tab
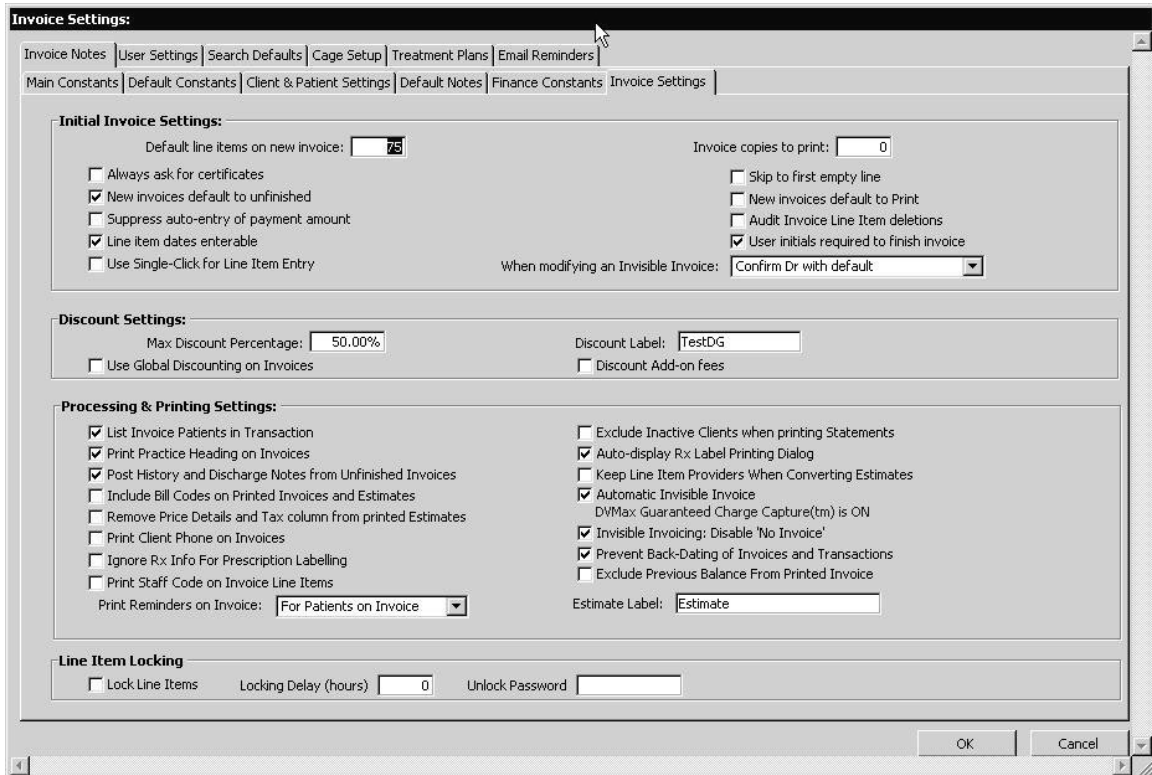

- Type the text you want to appear in the **Default Estimate Note** field.
- Click **OK** to save your changes.
- Click **OK** again to save your changes and exit **System Constants**.

Your default estimate note should contain general information that is relevant before the procedures on the estimate are performed. An example of this is pre-surgical instructions.

Default Lines on New Invoices and Estimates

This setting determines the number of blank lines that appear on a new estimate as well as invoices. For more information about line items, see **About Estimate Data Entry** elsewhere in this chapter. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**, or click the **Invoice Settings** tab.

- Type the number of empty lines you want on new invoices and estimates in the **Default Line Items on New Invoice** field.
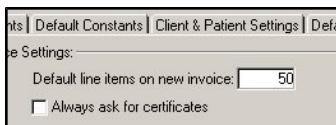
- Click **OK** to save your changes.

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

Discount Label for Estimates and Invoices

The text entered in this setting will appear on printed estimates and invoices beside the discount amount. The default text is **Discount**. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings** or click the **Invoice Settings** tab.

- Type a discount label in the **Discount Label** field.

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

Include Bill Codes on Printed Invoices and Estimates

This setting controls whether DVMAX prints Bill Codes as part of the description of line items on the estimate. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings** or click the **Invoice Settings** tab.
- Select the **Include Bill Codes on Printed Invoices and Estimates** checkbox to print Bill Codes on the estimate. Deselect the checkbox to have DVMAX suppress printing of Bill Codes.

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

Default Number of Estimate Copies to Print

This setting tells DVMAX how many copies of an estimate or invoice to print. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings** or click the **Invoice Settings** tab. The Invoice Settings screen appears.
- Type a number in the **Invoice Copies to Print** field.

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

Keep Line Item Providers When Converting Estimates

This setting controls whether an Invoice created from an Estimate retains individual line item Staff selections from the Estimate. If this setting is checked, line items on the invoice's Staff fields will contain the same values as on the originating Estimate. If this setting is unchecked, DVMAX will force each line item's Staff field to contain the Default Provider from the Estimate.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **SysConstants** drop-down menu on the DVMAX main screen, choose **Invoice Settings** or click the **Invoice Settings** tab.
- Select the **Keep Line Item Providers When Converting Estimates** checkbox to keep the Estimate's line item Providers on a resulting Invoice. Deselect the checkbox to have DVMAX force line items to have the same value as the Invoice's default provider.
- Click **OK** to save your changes.
- Click **OK** again to save your changes and exit **System Constants.**

Max Discount Percentage for Estimates

The number specified in this setting is the maximum discount that can be applied to any item on an estimate or invoice. If no number is specified, the maximum discount is 0% - i.e., no discount can be applied on an estimate or invoice.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings** or click the **Invoice Settings** tab.
- Type a percentage in the **Max Discount Percentage** field.

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

Print Practice Heading on Invoices and Estimates

If this setting is selected, DVMAX will print your practice's name and address at the top of an estimate or invoice. If you are printing estimates on letterhead, turn this setting off.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings** or click the **Invoice Settings** tab.

- Select the **Print Practice Heading on Invoices** checkbox to tell DVMAX to print your practice's name and address at the top of estimates.
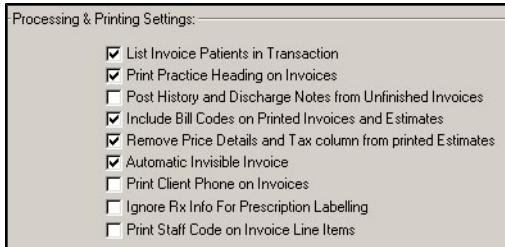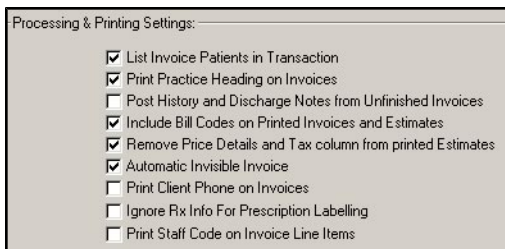

- Click **OK** to save your changes.

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

Remove Price Details and Tax Column From Printed Estimates

This setting controls whether the Lo Price, Hi Price and Tx columns appear when you print the estimate. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings** or click the **Invoice Settings** tab..

- Select the **Remove Price Details and Tax Column From Printed Estimates** check field to suppress printing of these columns. Deselect the checkbox to have DVMAX print these columns on the estimate.
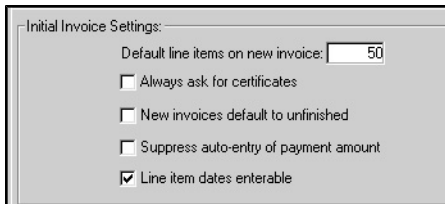

- Click **OK** to save your changes.

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

Suppress Auto-Entry of Payment Amount on Estimates

This setting tells DVMAX whether to automatically fill in the client's balance in the Deposit Amount field when accepting a deposit on an estimate. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **SysConstants** drop-down menu on the DVMAX main screen, choose **Invoice Settings** or click the **Invoice Settings** tab..

- Select the **Suppress Auto-Entry of Payment Amount** checkbox to tell DVMAX not to fill in a deposit amount. Deselect the checkbox to have DVMAX automatically place full payment in the deposit amount field.
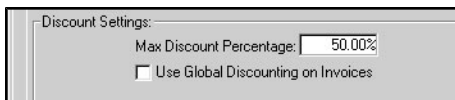
```
┌ Initial Invoice Settings: ──────────────────┐
│   Default line items on new invoice: │   50 │ │
│   ☐ Always ask for certificates              │
│   ☐ New invoices default to unfinished       │
│   ☐ Suppress auto-entry of payment amount    │
│   ☑ Line item dates enterable                │
└──────────────────────────────────────────────┘
```

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

Use Global Discounting on Invoices and Estimates

This setting tells DVMAX whether to allow discounting of all items on an estimate. If this setting is not in effect, only items specified as discountable can have discounts applied to them.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings** or click the **Invoice Settings** tab.
- Select the **Use Global Discounting on Invoices** checkbox to tell DVMAX that all line items on an estimate can be discounted. Deselect the checkbox to respect the discountable setting of a Bill Item.
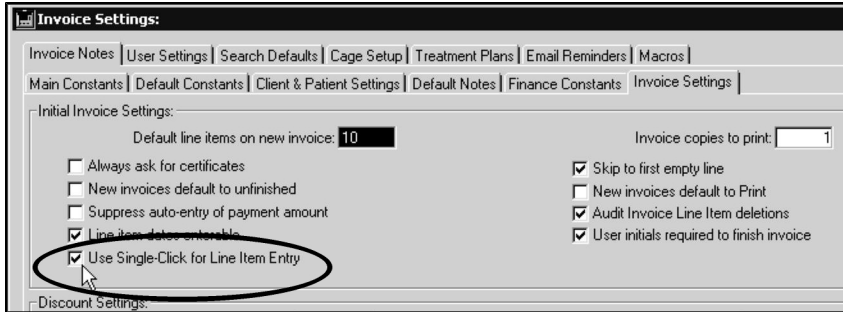
```
┌ Discount Settings: ──────────────────────────┐
│   Max Discount Percentage: │ 50.00% │         │
│   ☐ Use Global Discounting on Invoices        │
└──────────────────────────────────────────────┘
```

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

Use Single-Click for Line Item Entry on Estimates

This setting determines whether a single or double-click in a line item field is required to edit a line item on an invoice or estimate. If this setting is selected, DVMAX will allow editing of a line item field with a single-click into that field. If this setting is deselected, you must double-click a line item field to edit it inline. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings** or click the **Invoice Settings** tab.
- Click to change the **Use Single-Click for Line Item Entry** checkbox.

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

Fax Client

Licensing the Fax Client

Faxing is an add-on feature in DVMAX that requires a license. To enable faxing, call DVMAX Tech Support at 1 (800) 950-5455 to discuss adding faxing to DVMAX. Please have your DVMAX ID ready when calling.

DVMAX also offers support online at DVMAX http://users.dvmax.com.

Setting up the Fax Client in DVMAX

To use the Fax Client, your terminal must have:

- An internet connection.
- A Fax Client. Contact DVMAX Technical Support for information on acquiring the appropriate fax client.
- A DVMAX fax license to run the faxing options. Contact DVMAX Technical Support for information on licensing options.

⚠ Setting up the DVMAX Fax client is done by DVMAX Technical Support. The Fax client details are located under the **User** tab in **System Constants**. These details should not be modified without direction from DVMAX Technical Support.

Using the Fax Client

The Fax Client allows DVMAX you to digitally fax Word Processing documents to clinic contacts such as referral sources. You can send a fax from a referral source record or from a Client or Patient record.
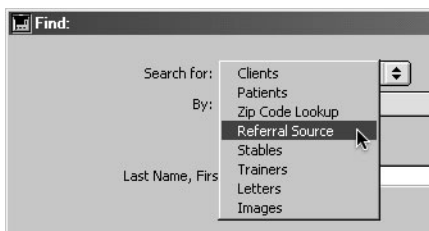
Send a Fax from a Referral Source Record

To send a fax from a referral source record:

- From the **Section** menu, choose **Clients & Patients**.

    -OR-

- From the **Command Palette** click the **Patient** or **Client** icon.
- From the **Find** dialog, select **Referral Sources** from the **Search For** menu.

- Perform a search for the referral source you would like to fax.

⚠️ To be able to send a fax each referral source requires a valid fax number to be entered in the source's **Fax #** field.

- Select the **Word Processing** tab of the Referral Source window.

- Open the **WP** document you want to fax.

- Edit the WP document as needed.

- To fax: while holding down the **Shift** key, select **Print** from the **WP File** menu.
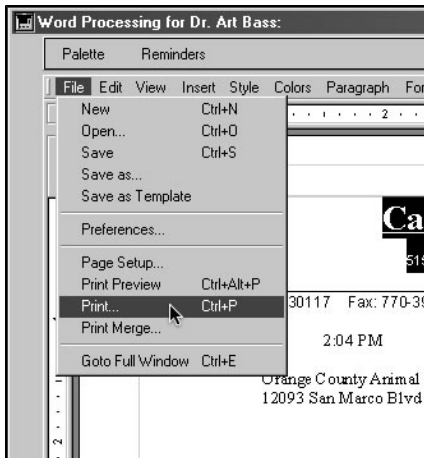
- The Fax dialog will display.

- From the Fax dialog, complete the **Subject, Recipient, Company,** and **Fax number** as needed. Note that when faxing a WP document from a Referral Source record, the fax **To** field is set to the name of the referral source and the **Company** field is set to the practice name of that referral source.

- Once you have entered the required information in the Fax dialog, click **Send**.

ℹ️ Referring Vet fax numbers are included in a patient's printed history.

Send a Fax from a Patient or Client Record

The process for sending a fax from a patient, client or referral source record is the same. When sending from a patient or client record, the default **To** and **Company** name details will be derived from the **Referred By** field in the Client or Patient record. These details can be modified before sending, when the Fax dialog is open.

ℹ️ A "Fax Sent" MRE is added to a patient's History whenever a fax is successfully sent from a patient WP document. This setting can be turned off via Advanced Settings. Contact DVMAX Technical Support for more information on Advanced Settings.

To send a fax from a Patient (or Client) record:

- From the Patient or Client record, select the **Word Processing** tab .

- Open the **WP** document you want to fax.

- Edit the WP document as needed.

- To fax: while holding down the **Shift** key, select **Print** from the **WP File** menu.
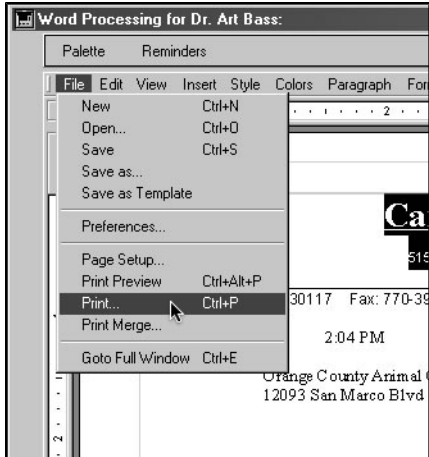
- The Fax dialog will display.

- From the Fax dialog, complete the **Subject, Recipient, Company** and **Fax number** as needed.

- Once you have entered the required information in the Fax dialog, click **Send**.

⚠️ The default **To**, **Fax #** and **Company** name values in the Fax dialog are derived from the **Referred By** field in the Client/Patient record, provided that there is data in the **Referred By** field.

Financial Reports

DVMAX provides a variety of reports that can help you with the financial management of your practice, from simple sales totals to complex accounts of revenue generated by each provider in your clinic. Generally, financial reports gather, sort and total information from invoices and transactions you post in your day-to-day work with DVMAX. This chapter reviews all financial reports in DVMAX.

There are a number of reports that you should run at year-end. For more information about year-end reports, see **Year-End Procedures and Reports**.

Accessing Reports

You can view the list of available financial reports either by clicking the **Reports** icon on the **Command Palette** or by choosing **Reports** from **General Management** under the **Section** menu.

To view the list of **Reports**:

- Click the **Reports** button on the **Command Palette**.

   -OR-

- Choose **General Management** from the **Section** menu on the DVMAX main screen, then select the **Reports** tab.

<u>C</u>lients & Patients	Ctrl+0
<u>I</u>nventory Management	Ctrl+3
<u>P</u>atient Codes	Ctrl+4
<u>S</u>ystem Constants	Ctrl+5
<u>G</u>eneral Management	Ctrl+6
<u>L</u>og Records	Ctrl+7
<u>B</u>oarding	Ctrl+8
<u>T</u>reatment Plans	Ctrl+9
<u>R</u>eminders	

ⓘ Reports launched from the Command Palette or from the **Reports** tab under **General Management** will show in the Window List.

Printing and Exporting Reports

You can print all financial reports in DVMAX. You can also export some reports to a text file that you can then open in a spreadsheet application such as Microsoft Excel. The reports available for export are:

- Full Details Transaction Summary (Transaction Summary Report)
- Daily Totals Transaction Summary (Transaction Summary Report)
- Totals Only Transaction Summary (Transaction Summary Report)
- Detailed Sales Report
- Receivables Report
- Sales Tax Charged Out Report

Setting DVMAX to Allow Exporting of Reports

A setting in **System Constants** controls whether DVMAX gives you the option to export reports. To see or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the System Constants dialog, select **Prompt to Print or Export Financial Reports** to have DVMAX make the export option available. Deselect the check-box to make printing reports the automatic choice.

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

Audit Trail Reports

Audit Trail reports list all transactions (invoices, payments, returns, refunds, etc.) for a time period you supply. Unfinished invoices from outside the time period you supply are also included in the report.

⚠️ There is an **Advanced Setting** which controls whether Estimates appear in the audit trail reports. By default, Estimates do not appear in these reports. Payments recorded on Estimates will always appear. If you want to modify the default setting, please contact Technical Support for assistance in making changes to any Advanced Settings.

The **Audit Trail Detail** report lists line item details on invoices, whereas the **Audit Trail Summary** report does not.

Audit Trail Summary Report

The **Audit Trail Summary** report summarizes transactions by client for the time period you specify. For each transaction, DVMAX lists the date, type of transaction, the patient, and the transaction amount.

Generating an Audit Trail Summary Report

To generate an **Audit Trail Summary** report:

- Click the **Reports** button on the **Command Palette**. A list of available reports opens.

-OR-

- Choose **General Management** from the **Section** menu on the DVMAX main screen.

- Double-click **Audit Trail Summary Report** to open the **Audit Trail Summary** dialog.

- Type the **Start Date** and **End Date** for which you wish to run the report into the appropriate **Date Range Entry** field. The default format for dates in DVMAX is MM/DD/YYYY.

Audit Trail Summary:

Enter the Date and Time Range:

Start Date:	11/14/2017	End Date:	12/14/2017
Start Time:	12:55:00	End Time:	23:59:59

OK   Cancel

- Type a start time and end time for the report into the **Start Time** and **End Time** fields. The **Start Time** is the time of day on the **Start Date** from which to include transactions for the report. The **End Time** is the time of day on the **End Date** after which no transactions will be included in the report.

ⓘ You may use either a 24-hour clock for time entry, or you may type AM or PM after the time. For example, you can type two o'clock in the afternoon as either 14:00 or 2 PM.

- Click **OK** to generate the report.

Audit Trail Detail Report

The **Audit Trail Detail** report lists all transactions, including line item information, posted in the time period you specify. Transactions are grouped by client.

For each invoice in the report, DVMAX provides the following information:

- The invoice date.
- The client.
- The invoice number and status (finished or unfinished).
- The total dollar amount.
- The line items on the invoice.

For each line item, DVMAX provides the following information:

- The patient name.
- The category.
- The Bill Item code.
- The description.

- The provider.

- The discount percentage.

- The tax percentage.

- The quantity.

- The dollar amount.

Generating an Audit Trail Detail Report

To generate an **Audit Trail Detail** report:

- Click the **Reports** button on the **Command Palette**. The **Report List** appears.

- Double-click **Audit Trail Detail Report**. The **Audit Trail Detail** screen appears.

- Type a start date and end date for the report in the **Start Date** and **End Date** fields. The default format for dates in DVMAX is MM/DD/YYYY.

- Type a start time and end time for the report into the **Start Time** and **End Time** fields. The **Start Time** is the time of day on the **Start Date** from which to include transactions for the report. The **End Time** is the time of day on the **End Date** after which no transactions will be included in the report.

🛈 You may use either a 24-hour (military) clock for time entry, or you may type AM or PM after the time. For example, you can type two o'clock in the afternoon as either 14:00 or 2 PM.

- Click **OK** to generate the report.

Detailed Sales Reports

A **Detailed Sales** report gives you comprehensive information on your practice's sales for a given time period. You can choose from many options when generating a Detailed Sales Report. You can see sales totals grouped by Doctor and by Category, and by combinations of these groupings. You can also choose to report on a single Bill Code or Bill Code category.
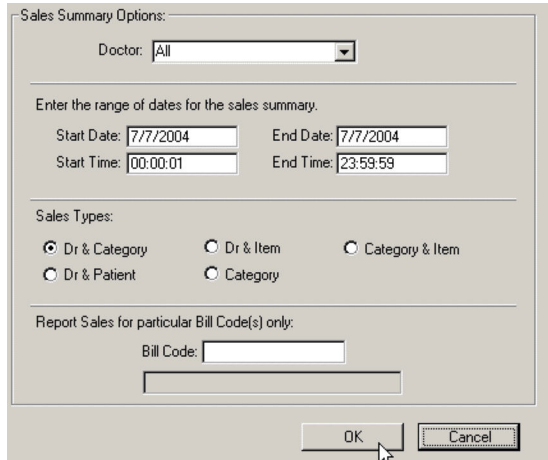
Each variety of Detailed Sales report requests a time period to use for the report, and provides you the choice of either printing or exporting the report to an Excel-compatible text file.

🛈 The **Detailed Sales** report can be used as a basis for staff compensation in your practice.

Generating a Detailed Sales Report

To generate a **Detailed Sales** report:

- Click the **Reports** button on the **Command Palette** or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The **Report List** displays.

- Double-click **Detailed Sales Report** from the reports list.
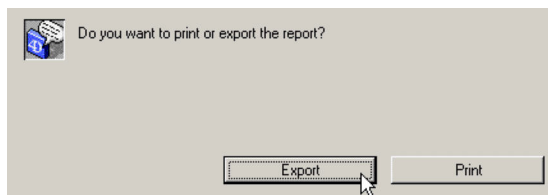

- Choose the doctor for the report from the **Doctor** drop-down list at the top of the **Report Options** dialog. The default is to report on all doctors in your practice.

- Type a start date and end date for the report in the **Start Date** and **End Date** fields. The default format for dates in DVMAX is MM/DD/YYYY.

- Choose a **Report Type** (Dr. & Category, Dr. & Patient, Dr. & Item, Category, or Category & Item) by clicking the appropriate radio button. For more information on these report types, see **Sales Summary Options**.

- If you wish to report on a particular item or Bill Code only, type the item's Bill Code in the **Bill Code** field.

ℹ️ You can use the **@ wildcard** in the **Bill Code** box. For example, if all your Bill Codes for medications begin with rx, type rx@ in the Bill Code box to limit the **Detailed Sales** report to medications.

- Click **OK** to generate the **Detailed Sales Report**. DVMAX will begin compiling the report. The time it takes to generate the report depends on the amount of data DVMAX needs to sort through and the speed of your computer.

- When the report is ready, DVMAX will ask you if you want to print or export the report.

- Click **Export** to export the report to an Excel-compatible file on your computer.

-OR-

- Click **Print** to print the report.

Sales Summary Options

You can choose from the following types of **Detailed Sales Reports**. Each type of report compiles information from invoices and transactions recorded during the requested time period.

Doctor and Category Detailed Sales Report

DVMAX will list sales totals, grouped by category, for each doctor selected to be on the report. Listed on a line under every doctor on the report are:

- The total sales amount (in dollars) for each category.
- The % of total sales represented by each category.
- The cost to your practice of each category.
- Your profit from each category.

DVMAX also totals each of the values listed above for each of the doctors on the report. Grand totals are provided at the end of the report.

For more information on Categories, see **Inventory Management** and **Bill Items.**

Doctor and Patient Detailed Sales Report

The Doctor and Patient **Detailed Sales Report** lists sales totals, grouped by patient, for each doctor selected to be on the report. Listed on a line under every doctor on the report are:

- The name of the patient and client to whom an item was sold
- The item code and description of the item sold
- The amount the item was sold for
- The cost of the item to your practice
- Your profit from the sale of the item

DVMAX also totals each of the values listed above for each of the doctors on the report. In addition, DVMAX presents each doctor's percentage of your practice's total sales for the requested time period. Grand totals are provided at the end of the report.

Doctor and Item Detailed Sales Report

The Doctor and Item **Detailed Sales Report** lists sales, grouped by bill item, for each doctor selected to be on the report. Each item sold by a doctor is listed under that doctor, and the following information is provided for each item sold:

- The quantity sold.
- The bill item code and description.
- The item's category.
- The dollar amount for which the item was sold.
- The percentage of total sales accounted for by this item (in the time period being reported on).
- The cost to your practice of this item.
- Your profit from the sale of this item.

DVMAX also provides a subtotal, on a per-category basis, for each of the values listed above. A subtotal is also provided for each doctor. Grand totals are provided at the end of the report.

The **Doctor and Item** report differs from the **Item** report in that it breaks out sales by doctor. The **Doctor and Item** report differs from the **Doctor and Category** report in that the **Doctor and Item** report lists individual item sales.

Category Report

The **Category Detailed Sales** report lists sales for a given time period, grouped by category. The following information is provided:

- The dollar amount of sales of each category

- The percentage of total sales accounted for by each category

- The cost to your practice of each category

- Your profit from each category

DVMAX presents grand totals at the end of the report.

The **Category** report differs from the **Doctor and Category** report in that it does not break out category sales by doctor. The **Category** report is like a simplified version of the **Item** report.

Item Detailed Sales Report

The **Item Detailed Sales** report lists item sales for a give time period, grouped by category. Each item sold is listed under its category, and the following information is provided:

- The quantity of the item sold.

- The bill item code and description.

- The item's category.

- The dollar amount for which the item was sold.

- The percentage of total sales accounted for by this item (in the time period being reported on).

- The cost to your practice of this item.

- Your profit from the sale of this item.

DVMAX also provides a subtotal, on a per-category basis, for each of the values listed above. Grand totals are provided at the end of the report.

The **Item Detailed Sales** report is similar to the **Category Detailed Sales** and the **Doctor and Item** report. It differs from the **Category** report in that it lists individual item sales where the **Category** report does not. It differs from the **Doctor and Item** report in that it does not break out information by doctor.

Invoicing Reports

DVMAX provides five reports that allow you to see how effectively your practice is invoicing. For information on invoices, see the chapter **Invoices**.
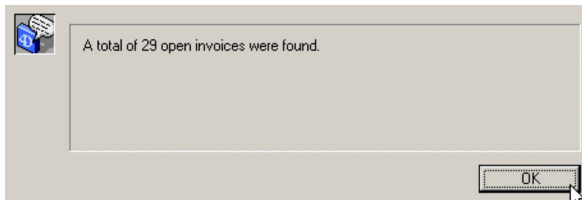
Unfinished Invoices Report

This report lists all unfinished invoices in your practice. For each unfinished invoice, DVMAX lists the invoice number, client and patient name, the current total on the invoice, and the date the invoice was last modified.

Generating an Unfinished Invoices Report

To generate an **Unfinished Invoices Report**:

- Click the **Reports** button on the **Command Palette**, or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The **Report List** displays.

- Double-click **Unfinished Invoices Report** from the report list.

- DVMAX will tell you how many unfinished invoices are on file.

A total of 29 open invoices were found.

- Click **OK** to close the message box and print the report.

Unfinished Invoices by Doctor Report

The **Unfinished Invoices by Doctor** report lists each doctor's unfinished invoices. Each unfinished invoice appears under the responsible staff member's name. The report lists the invoice date and number, the primary patient and the current total on the invoice.

Generating an Unfinished Invoices by Doctor Report

To generate an **Unfinished Invoices by Doctor** report:

- Click the **Reports** button on the **Command Palette**, or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The **Report List** appears.

- Double-click **Unfinished Invoices by Doctor Report**.

Outstanding Invoices by Doctor Report

This report generates a listing of all invoices that have not been paid, sorted by doctor. DVMAX lists each outstanding invoice's date, number, client, client phone number, and total with tax.

In addition, DVMAX supplies the doctor's share (as a percentage) of the total invoice and of the outstanding receivable amount. These values are found in the **Invoice Split %** and **O/S Share** columns, respectively.

Generating an Outstanding Invoices by Doctor Report

To generate an **Outstanding Invoices by Doctor** report:

- Click the **Reports** button on the **Command Palette**, or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The

Report List appears.

- Double-click **Outstanding Invoices by DoctorReport**.

Average Invoice per Doctor Report

The **Average Invoice per Doctor** report presents, for each doctor or provider in your practice:

- The number of invoices posted.

- The average dollar amount per invoice.

- The average payment received per invoice, at the time the invoice was posted.

- The total dollar amount billed.

- The ratio of average dollar amount **billed** per invoice to average payment **received** per invoice, expressed as a percentage.

This report also calculates the combined values of the items listed above for all the doctors in your practice. You may specify any date range you desire for these calculations. The default is the current month.
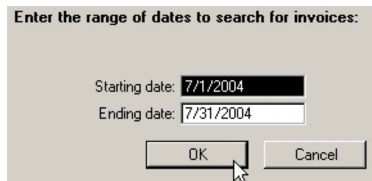
⚠ This report uses the Primary Provider for each invoice to calculate its totals. It does not take into account any invoice line items assigned to providers other than the Primary Provider listed at the top of the invoice. Because of this, the **Average Invoices per Doctor Report** should **not** be used as the basis of staff compensation. Use the **Detailed Sales Report** instead.

⚠ This report uses only payments received at the time the invoice was posted. It does not take into account payments received after the invoice was posted.

Generating an Average Invoice Per Doctor Report

To generate an **Average Invoice Per Doctor** report:

- Click the **Reports** button on the **Command Palette** or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The **Report List** displays.

- Double-click **Average Invoice Per DoctorReport**. The **Date Range Entry** dialog opens.

- Type the time period for which you wish to run the report into the **Date Range Entry** fields. The default format for dates in DVMAX is MM/DD/YYYY.

- Click **OK** to generate the report.

Invoice Share By Provider Report

The **Invoice Share by Provider** report gives you the average revenue per invoice per provider in your practice. DVMAX lists each invoice in a given time period and sorts this list by

provider, so that you can easily see each invoice a provider appeared on, and how much of the total billed on that invoice was credited to that provider. The total number of invoices a provider appeared on and the actual dollar amount billed by each provider is also given, along with the weighted average gross per transaction.
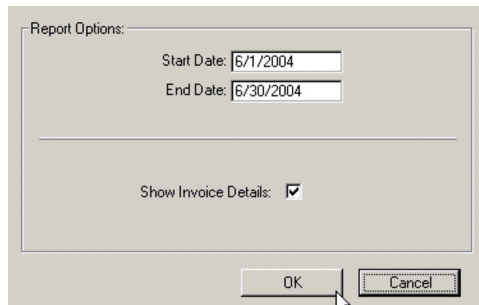
You can choose to generate a summary report only, which does not provide any invoice details but presents instead totals for each doctor. Unlike the **Average Invoices per Doctor** report, this report takes into account providers credited on an invoice's individual line items.

⚠️ This report uses only payments received at the time the invoice was posted. It does not take into account payments received after the invoice was posted.

Generating an Invoice Share by Provider Report

To generate an **Invoice Share by Provider** report:

- Click the **Reports** button on the **Command Palette** or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The **Report List** displays.

- Double-click **Invoice Share by ProviderReport**. The **Report Options** dialog displays.

- Type the year for which you wish to run the report into the **Start** and **EndDate** Range Entry fields. The default format for dates in DVMAX is MM/DD/YYYY.

- Select the **Show Invoice Details** checkbox to list each invoice on the report.

-OR-

- Deselect the **Show Invoice Details** checkbox to produce a summary report.

- Click **OK.**

Receivables Report

The **Receivables** report gives you a snapshot of what is owed to you by your clients (Accounts Receivables), and what you owe them (Credit Balances) at the time you run the report.
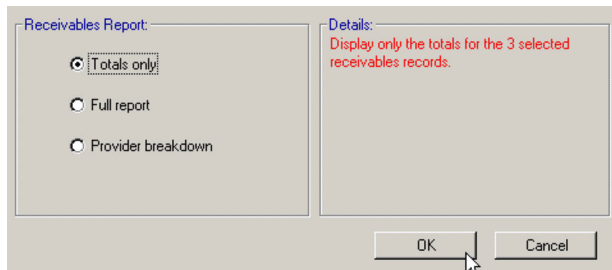
Generating a Receivables Report

To generate **a Receivables** report:

- Click the **Reports** button on the **Command Palette**, or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The

Report List displays.

- Double-click **Receivables Report**. The **Receivables Report Options** dialog opens.

- Choose a **Receivables** report type (**Totals Only**, **Full Report** or **Provider Breakdown**) by clicking the appropriate radio button. For information on the differences between types of **Receivables** reports, see **Receivables Report Types.**

- Click **OK** to generate the report. DVMAX may ask you if you want to print or export the report.
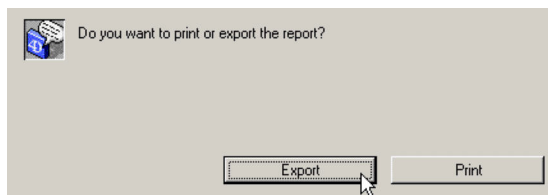
- Click **Export** to export the report to an Excel-compatible file on your computer.

  -OR-

- Click **Print** to print the report.

Receivables Report Types

DVMAX can produce three variations on the **Receivables** report: a **Full Report**, a **Totals-Only** report, and a **Provider Breakdown** report.

Full Report (Receivables)

The **Full Report** is the most comprehensive **Receivables** report type. For each receivable and credit balance, DVMAX lists:

- The client's name and ID.

- The amount and date of the client's last payment.

- The client's telephone number.

- Subtotals of the client's total balance by age (current, 30 days, 60 days, and 90+ days).

- The total amount due from this client.

DVMAX also totals receivables and credits, and combines the two for an overall total. The percentage of your balances at each age (current, 30, 60 and 90+ days) is also calculated.

Totals-Only Receivables Report

The **Totals-Only Receivables** report is a summary of your Accounts Receivables and Credit Balances. For both Receivables and Credits, DVMAX shows aged amounts (current, 30 days, 60 days, and 90+ days) and the percentage of the total balance at each age. Overall totals are also provided.

Receivables by Provider Report

The **Receivables By Provider** report type lists the total receivables produced by each provider in your practice. The percentage accounted for by each provider is also calculated, as is a total for your practice as a whole.

Any receivables not attributed to a provider are also listed on the report. Finally, totals for sales taxes are also provided.

ℹ️ The **Provider Breakdown** report type is useful if you pay your providers based on production.

Referral Reports

Referral Source Ranking Report

The **Referral Source Ranking** report allows you to see which hospitals and doctors refer the greatest number of clients to your practice. The report is compiled from invoices posted in a date range you specify. You can sort the report by revenue generated by referrals or by a simple referral count. You can also choose to report only those referrals whose first visit to your practice was within the date range you specify.

The printed report groups referrals by hospital and then by doctor from that hospital. The total number of referrals and the total value of revenues are listed for each doctor and hospital.

Generating a Referral Source Ranking Report

To generate a **Referral Source Ranking** report:

- Click the **Reports** button on the **Command Palette**, or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The **Report List** displays.

- Double-click **Referral Source RankingReport**. The **Referral Ranking ReportOptions** dialog opens.

- Type the date range for the report into the **Starting Date** and **Ending Date** fields. The default format for dates in DVMAX is MM/DD/YYYY.

- Click to select the **Descending Referral Revenue** radio button to have DVMAX sort the report by revenue, with the highest numbers first.

-OR-

- Click to select the **Descending Referral Count** radio button to have DVMAX sort the report by number of referrals, with the highest numbers first.

- Click the **Include New Patient Referral Counts** checkbox to report only those referrals whose first visit to your practice was within your date range. Click again to deselect the checkbox and report on all referrals.

- Select **Include Patient Details** if you would like to include them in the report.

- Click **OK** to generate the report.

Revenue Referral Report

The **Revenue Referral** report allows you to see which other hospitals or doctors have referred the greatest amount of revenue to your practice. You can track either client referrals or patient referrals. In either case, the value in the referral field of the client or patient record is used as one of the bases for this report.

You can also specify the time period for which you would like to track referrals, and you have the option to filter the report to show only new referrals during the time period you specify. If you do not filter to show only new referrals, any referred client whom you invoiced during the time period covered by the report will be listed.

The printed report groups referred visits to your practice by clinic and doctor within that clinic. For each referred visit, DVMAX lists the patient, client, the patient's first and most recent visits, the patient's doctor, and the revenue generated by that visit. DVMAX calculates subtotals for each referring doctor and clinic, and provides you with a grand total of revenue generated by referrals.

Generating a Revenue Referral Report

To generate a **Revenue Referral** report:

- Click the **Reports** button on the **Command Palette**, or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The **Report List** displays.

- Double-click **Revenue Referral Report**. The **Referral ReportOptions** dialog opens.

- Click the **Patient Referral Source and First Visit Date** radio button to use referrers from patient records in the report.

-OR-

- Click the **Client Referral Source and First Visit Date** radio button to use referrers from client records in the report.

- Type the time period you would like the report to cover into the **Starting Date** and **Ending Date** fields in the **First Visit/Invoice Date Range** section of the screen. The default format for dates in DVMAX is MM/DD/YYYY.

- Click to select the **Report Only New Referrals** checkbox to report only referred clients or patients new to your practice. Deselect the **Report Only New Referrals** checkbox to report any referred client or patient you invoiced in the specified time period.

- Click **OK** to generate the report.

The Sales Tax Charged Out Report

This report provides a detailed listing of sales tax your practice has charged to clients in a given time period, along with a total. Information for this report comes from invoices posted in DVMAX.

⚠️ This report calculates the sales tax recorded on invoices as billed to clients, regardless of whether the bill has been paid. The **Show Sales Tax Collected** reporting function can provide you with monthly totals of sales tax actually collected. See Practice Financials for more information.

For each day in the time period you request, DVMAX provides the following information, broken down by Department:

- The number of invoices posted.

- Total sales.

- Taxable sales.

- Sales tax charged.

- Total sales with tax.

DVMAX provides a per Department breakdown, with grand totals of these values presented at the end of the report.

Generating a Sales Tax Charged Out Report

To generate a **Sales Tax Charged Out** report:

- Click the **Reports** button on the **Command Palette**, or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The **Report List** displays.

- Double-click **Revenue Referral Report**. The **Date Range Entry** dialog opens.

- Type the time period for which you wish to run the report into the **Start Date** and **End Date** fields. The default format for dates in DVMAX is MM/DD/YYYY.

- Type a start time and end time for the report into the **Start Time** and **End Time** fields.

- Click **OK** to generate the report. DVMAX may ask you if you want to print or export the report.

- Click **Export** to export the report to an Excel-compatible file on your computer.

  -OR-

- Click **Print** to print the report.

Transaction Summary Reports

Transaction Summary reports provide information about all transactions recorded by DVMAX during the time period you specify. The various types of transaction reports allow you to check activity at your practice by viewing recent transactions individually, on a daily basis or in an overall summary, making it easy to keep tabs on day-to-day activity.

About Transaction Summary Report Types

There are four different types of **Transaction Summary** reports: **End of Day**, **Full Details**, **Daily Totals** and **Totals Only**.

The End of Day (EOD) Transaction Summary Report

The **End of Day** (**EOD**) report is the most comprehensive, and most commonly used, of the **Transaction Summary** reports.

The EOD report is divided into six sections:

- Financial Summary, broken down by Department
- Transactions Entered Out of Sequence
- Client Activity Summary
- Unfinished Invoice List
- Close-out Worksheet
- Average Transaction

The Financial Summary includes a list of invoices, estimates and returns broken down by Department, and a list of all transactions for the requested time period. The following information is provided for each transaction:

- The posted date.
- Transaction type.
- Any accompanying notes or description.
- The client name.
- The dollar amount.

Transactions Entered Out of Sequence lists transactions recorded during the requested period that were:

- Edited, reversed or voided during the requested time period.
- Post- or back-dated to fall outside the requested time period.

The **Smart Summary** option determines whether the transactions listed here appear in the transaction lists elsewhere in the report. For more information, see **The Smart Summary Option**.

DVMAX lists the following information about each out-of-sequence transaction:

- The posted date
- The transaction type and any accompanying notes or description
- The client and the date/time the transaction was recorded
- The dollar amount

These additional items make it easier to trace the origins and reasons for each out-of-sequence transaction:

- The **Client Activity Summary** lists every client with recorded invoice or payment activity dated in the requested time period. For each client, DVMAX lists the amount invoiced, the amount paid, net paid or owed, and any notes that accompanied the invoice or payment.

- The **Unfinished Invoice List** presents **all** the unfinished invoices in DVMAX, regardless of the invoice's date. DVMAX lists each invoice's date, number, client, patient and current dollar amount.

- The **Close-Out Worksheet** summarizes all transaction activity, grouping all billing and all payment activities in adjacent columns. By comparing the difference between the "Billed Out" total and the "Collected" total you can determine the expected change in the Receivables during the period. This allows you to "close-out" the activity at the end of the day, assuring proper accounting of all activities.

- The Receivable Totals section of the **Close-Out Worksheet** lists the receivables on the current date and as of the time the last **EOD** report was run.

- The **Average Transaction** report summarizes information about all invoices for the requested time period. DVMAX presents the total number of invoices, the average invoice amount, the total of all invoices, and the average payment per invoice (as dollar amount and percentage).

⚠️ The **Average Transaction** report uses payments made at the time of billing only. Deposits and payments on account are not used.

Totals Only Transaction Summary Report

The **Totals Only** report is the simplest of the four **Transaction Summary** reports, providing a total count and dollar amount for each transaction type recorded during the requested time period. This report is useful for spotting trends and examining monthly summaries in your practice.

⚠️ The **Smart Summary** option will eliminate redundant transactions from the totals. DVMAX will not list these removed transactions in a "Transactions Out of Sequence" section in the **Totals Only** report.

Daily Totals Transaction Summary Report

The **Daily Totals** report provides a daily subtotal of transactions for each transaction type recorded in the requested time period. Each daily subtotal consists of a count and dollar amount.

This report is useful for spotting daily trends in your practice. It is also helpful, in combination with the **End of Day** report, in checking for alterations in the financial activity of past days.

⚠️ The **Smart Summary** option will eliminate redundant transactions from the daily totals. DVMAX will not list these removed transactions in a "Transactions Out of Sequence" section in the **DailyTotals** report.

Full Detail Transaction Summary Report

The **Full Detail** report provides a list of all transactions for the requested time period. DVMAX breaks this list down by transaction type, and then by date of entry within each transaction type. Each transaction type is totaled.

The following information is provided for each transaction:

- The posted date.

- Any accompanying notes or description.

- The client name.

- The dollar amount.

DVMAX also presents a **Transactions Entered Out of Sequence** section in the **Full Detail** report. This section lists transactions recorded during the requested period that were

- Edited, reversed or voided during the requested time period

- Post- or back-dated to fall outside the requested time period

The **Smart Summary** option determines whether the transactions listed under **Transactions Entered Out of Sequence** appear in the transaction lists elsewhere in the report. For more information, see **The Smart Summary Option**.

DVMAX lists the following information about each out-of-sequence transaction:

- The posted date.

- The transaction type and any accompanying notes or description.

- The client and the date/time the transaction was recorded.

- The dollar amount.

These additional items make it easier to trace the origins and reasons for each out-of-sequence transaction.

Generating a Transaction Summary Report

To generate a **Transaction Summary** report:

- Click the **Reports** button on the **Command Palette**, or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The **Report List** displays.

- Double-click **Transaction Summary Report**. The **Transaction Summary** dialog opens.

- Type a start date and end date for the summary in the **Start Date** and **End Date** fields. The default format for dates in DVMAX is MM/DD/YYYY.

- Type a start time and end time for the summary into the **Start Time** and **End Time** fields. The **Start Time** is the time of day on the **Start Date** from which to include transactions for the report. The **End Time** is the time of day on the **End Date** after which no transactions will be included in the report. Using a 24-hour clock for time entry, you would type 00:00:00 into the **Start Time** field and 23:59:59 into the **End Date** field to specify a report for June 1.

ℹ️ You may use either a 24-hour clock for time entry, or you may type AM or PM after the time. For example, you can type two o'clock in the afternoon as either 14:00 or 2 PM.

- Select **Use date processed, not Transaction date** if you wish to use the actual calendar date the transaction was entered instead of the "Transaction Date", the date the user enters on the Transaction form.

- Choose a **Transaction Summary** report type (**End of Day**, **Full Details, Daily Totals** or **Totals Only**) by clicking the appropriate radio button. For information on the differences between types of reports, see **Transaction Summary Report Types.**

- Select **Smart Summary** to tell DVMAX to remove corrected transactions, or other transactions that cancel each other out, from the report. For more information, see **The Smart Summary Option**.

- Select **New Page for Each Type** if you would like DVMAX to start a new page for each transaction type in the report.

- Click **OK** to generate the report. DVMAX may ask you if you want to print or export the report.
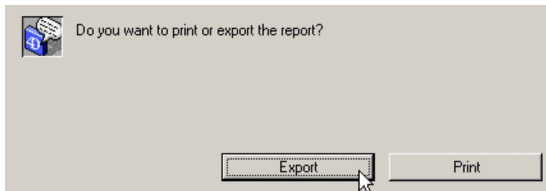
- If available, click **Export** to export the report to an Excel-compatible file on your computer, or click **Print** to print the report.

- If you chose **End of Day** as your report type, DVMAX will ask you to update the timer for the next end of day report.
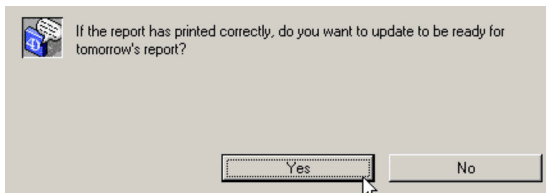
- Click **OK** to record the current date, time and current receivables total for use in the next end of day report. For more information, see **Transaction Summary Report Types**.

The Smart Summary Option

The **Smart Summary** option tells DVMAX to remove edits, corrections, voids and similar redundant transactions from the summary lists. A transaction is removed if it can be matched with a reversing transaction in the requested time period for the report.

If the **Smart Summary** option is not selected, Invoices and Payments that were corrected or voided will be included in the report totals. Totals will still balance out, but will be inflated in comparison to the totals generated with **Smart Summary** selected.

⚠️ DVMAX will always list **all** transactions for the requested time period. Transactions removed from the main summaries by the **Smart Summary** option are listed in "Transactions Out of Sequence" section of the report. You should verify the "Transactions Out of Sequence" section after generating a **Transaction Summary** report.

Transaction Types Used in Transaction Summary Reports

DVMAX looks at the following types of transactions when generating a **Transaction Summary** report:

- Invoices
- Chargebacks
- Credits
- Edited Charges
- Edited Credits
- Estimates
- General Charges
- Interest Charges
- Payments
- Refunds
- Returns
- Write-offs

Custom Reports

Custom Reports are available from the **General Management** Reports tab, and from the **Reports** button on the Command Palette. These reports are web-based; that is, they require an internet connection to generate the report. DVMAX's reporting engine allows custom reports to be sent to the clinics independent of release cycle. The reporting engine respects existing DVMAX security and logins; each report's security is mapped to an existing Practice security group. CSS style sheets are used for display and printing. For more on Custom Reports, refer to the **Custom Reports** chapter in this User Guide.

⚠️ To generate Custom Reports, the webserver must be running, and you must have a valid IP address.

To verify that the webserver is running:

- Log in to DVMAX as Administrator.
- From the **Section** menu, select **System Constants**. Go to the **User Settings** tab.

- From the **Web** area of the dialog, verify that the web server is running and that there is a valid Port number. If the webserver is running, the Web area will contain the note "Web server is running on [port]". Refer to the chapter **System Constants** for more information.
- Close **System Constants**.

About Finance-Related Custom Reports

Custom reports not only offer a powerful addition to DVMAX's report generating function, but the reports offer the data in a more presentation-ready layout. Reports are stored in the "customReports" folder in the web folder. Each report is contained in its own folder inside the "customReports" folder.

In each report's folder are two files:

- **index.shtml** - this is the report code.
- **Definition.xml** - the report definition. This contains the report's name, security access, and description.

The name of the report and its description appear on the Reports list. For more detail on these reports, refer to the **Custom Reports** chapter in this user guide.

Complete Audit Trail – All Transactions

Complete Audit Trail lists all transactions, broken down by client, for a given time period. All unfinished invoices are included, regardless of specified date.

Detailed Doctor Production

The Detailed Doctor Production report allows you to configure and perform bonus calculations by provider. The report gathers information from the Detailed Sales Report, Receivables Report and the Average Invoices per Doctor report.

Detailed Sales Report

The Detailed Sales Report is the standard DVMAX sales report, which allows you to report on any combination of doctors, time periods and bill items.

Discount Report

This report gathers all undefined discounts (global/default discounts, etc) and reports on them. Separately, it reports on bill item discounts as well and then returns a grand total value.

GL Account Report

The GL Account report makes full use of the GL Account codes in DVMAX. If assigned to Bill items, DVMAX will search for and group sales totals based on GL Account codes. The report can be copy/pasted into Excel and then imported into accounting software like Quickbooks.

Initial Referral Report

The Initial Referral Report provides a comparison of referral numbers between two time periods, broken down by referring DVM, Practice and referral recipient. It allows users to measure impact of marketing efforts.

Invoice to Line Item Comparison Report

Find how an adjustable bill item is used on invoices. The output shows the invoice number, the invoice total, whether the queried bill item was used and how much money was associated with it.

Multi-Site Detailed Doctor Production

This report allows you to configure and perform bonus calculations per provider. It gathers information from the Detailed Sales Report, the Receivables Report and Average Invoices Per Doctor Report.

Price Increase/Revenue Projection

This report shows the top-selling items in your practice over the last 12 months, and what the net increase in revenue would be were you to increase the prices of these items 5%, 10% or 15%.

Referral Line Item Report

The Referral Line Item report gathers invoice line items in a specified date range and category and reports on patient, provider and referral revenue associated with them. This report is meant to be exported.

Species Revenue Report

A report that groups sales totals by species.

Transaction Report

This report lists all transactions of selected types recorded in the date range you specify. You can report on one or multiple transaction types. Output can be sorted by client or by date, and copied into a spreadsheet for further manipulation.

Generating a Custom Report

- Click the **Reports** button on the **Command Palette**, or choose **General Management** from the **Section** drop-down menu, and click the **Reports** tab. The **Report List** displays.

- The Standard and Custom report lists display. Double-click the report in the Custom list you want to generate. The report opens in a new browser window. You may be required to log in before you can run the report.

Adding a New Custom Report to the Custom Report List

When a new report is received (typically by DVMAX Technical Support), you must place it in its proper folder.

⚠️ Only alphanumeric codes and the underscore character can appear in the XML element definitions.

To add a new custom report:

- From the **Section** menu, select **System Constants**. Click the **User Settings** tab. In the Custom Report section, click **Reload From Server**.
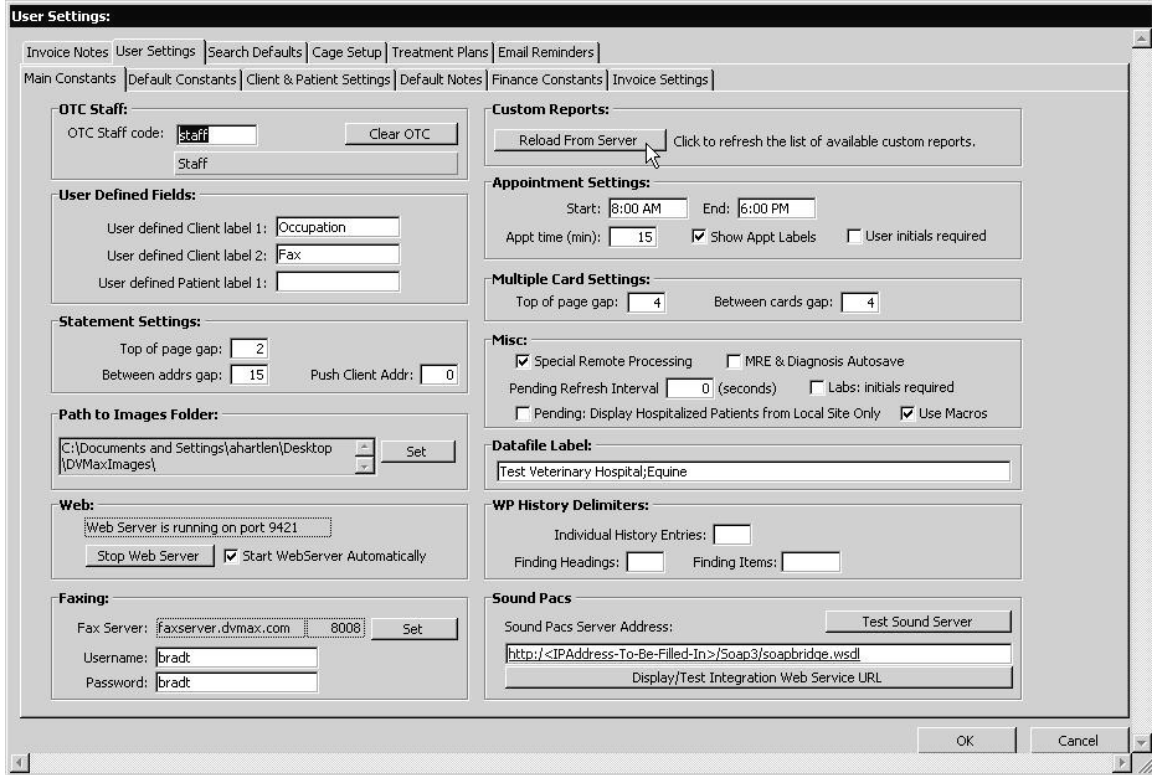
Security Access

You can restrict access to a specific group by adding the group name to the "Access" parameter in the XML file. Separate multiple groups with commas.

⚠ When upgrading from older versions of DVMAX (before 7.10), take care to preserve the contents of the "customReports" folder. Contact DVMAX Technical Support if you have questions.

Findings

The DVMAX Findings functionality allows you to enter most of your patient history with almost no typing. When you use a Finding to add information to a patient history, you can quickly select from a predefined list of conclusions.

With Findings, you can quickly organize a large number of choices into an easy-to-use interface. From this interface you can enter only those items that are relevant or noteworthy to a particular case. This makes data entry fast, structured and predictable.

This chapter covers setting up Findings for use on a Patient History. You must link a Finding to a Medical Record Code or a Diagnosis before you can use it on a Patient History. For more information on linking Findings, see chapters on **Medical Record Codes** and **Diagnoses** in this manual. For information on using a Finding on a Patient History, see **Working With Patient Records**.

Findings: An Overview

A Finding is composed of three hierarchical elements: a **Finding Class** contains one or more **Finding Items**, which in turn contain one or more **Item Options**.
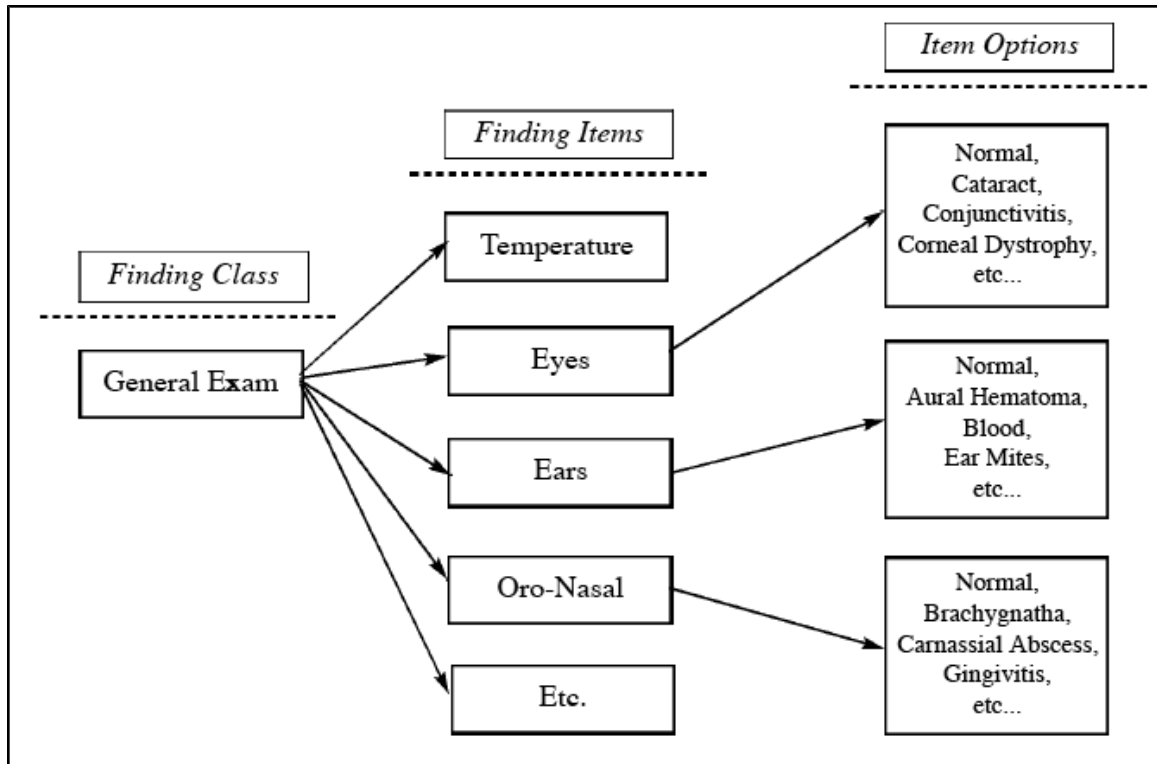
The **Finding Class** defines the type or category of information that will be entered onto the patient record by a Finding. In practice, a **Finding Class** is referred to more generally as simply a **Finding**.

Finding Items are the individual items that combine to make up the Finding Class.

Finding **Item Options** are the most common results arising from each Finding Item in the Finding Class. Item Options become clickable elements in the DVMAX user interface.

Creating a New Finding

Overview of Creating a Finding

Plan your Finding before creating it in DVMAX. When mapping out a new Finding:

- Define the **Finding Class** that you want to create. It can be an exam, a diagnostic test, a lab result or anything that you would normally make detailed and structured notes about.

- List the **Finding Items** that make up the Finding Class. These are the different types of information, observations or results that make up the Class. For example, the Finding Items that make up a General Examination might include the patient's temperature, weight, and disposition, as well as the results of eye and

ear examinations. Make certain you have covered them all and be sure to arrange them in the order you want.

- List the most common **Finding Item Options** for each Finding Item. For example, the Item Options for an Eye Exam in a General Examination might include "Normal", "Cataract" and "Corneal Dystrophy."

Once your Finding is planned, create it in DVMAX in the reverse order to which you planned it.

- Start with the lowest part of the hierarchy: create the Finding Items and their associated Options.
- Create the Finding Class and attach to it all of the Finding Items you have just defined. Make sure to add them in the order you want to enter them.

 Consider working out the basic structure of a Finding Class on paper before you implement it in DVMAX.

 When you have successfully created a Finding, you need to associate it with a defined Medical Record Code or Diagnosis. (You can also create a Medical Record Code or Diagnosis for the sole purpose of entering Findings.) See the chapters Medical Record Codes and Diagnoses for information on this.

Creating Finding Items

To create a Finding Item record:

- Choose **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, choose **Finding Items** from the **Search For** drop-down list.
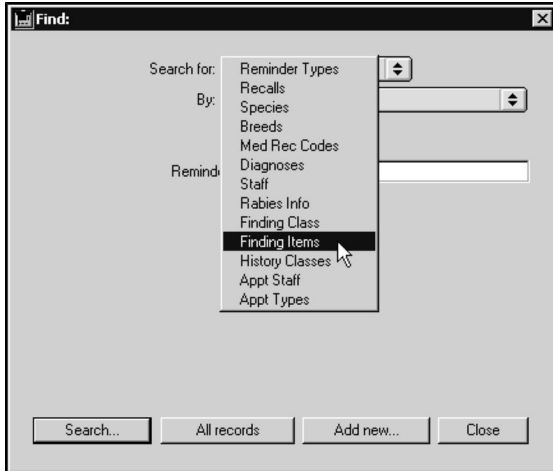
- Click **Add New** at the bottom of the **Find** window.

- The **New Finding Item** window displays.
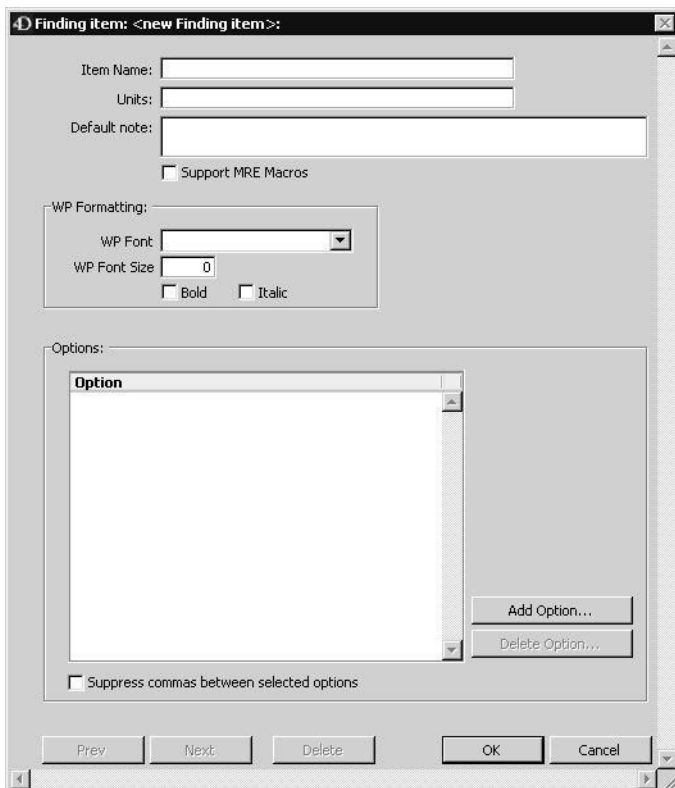
- Type a unique name for this Finding Item in the **Item Name** field. The name can be up to 40 characters long.

- If this item will be measured in units, type the unit measure in the **Units** field. For example, if you are creating a "Heart Rate" Finding Item, the unit measure will be "BPM" (Beats Per Minute). Leave this field empty if the item is not measured in units.

- Type the text to appear automatically when this Finding Item is used on a Patient record into the **Default Note** field. You can leave this field empty if you do not wish any text to appear by default, and you can change the Default Note when you use the Finding Item on the patient record.

- If you wish to be able to use this Finding Item in a Macro, click to select the **Support MRE Macros** checkbox. See **Macros** for more information on this setting.

- Set the font and size for use in Word Processing documents.

- Click the **Add Option** button to add Options to this item. See **Adding Options to a Finding Item** for more information.

-OR-
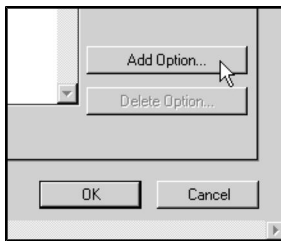
- Choose **Add New Option** from the **Finding Items** drop-down menu to add Options to this item. See **Adding Options to a Finding Item** for more information.
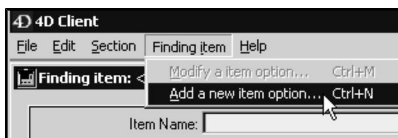
CONTROL+N (COMMAND+N on Macintosh) is a keyboard shortcut for **Add New Option**.

- Click to select the **Suppress Commas Between Selected Options** checkbox to tell DVMAX not to separate options with a comma when entering this Finding Item on a patient record. Leave this field unselected to separate item options with a comma on the patient record.

- Click **OK** to save this Finding Item.

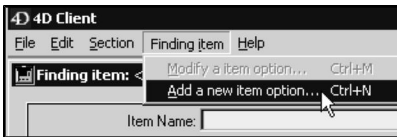## Adding Options to a Finding Item

To add options to a Finding Item:
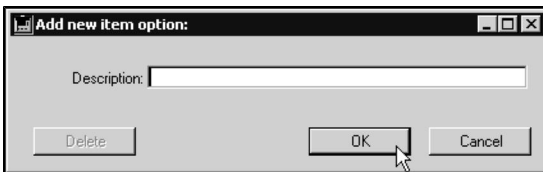
- Click **Add Option**.

-OR-
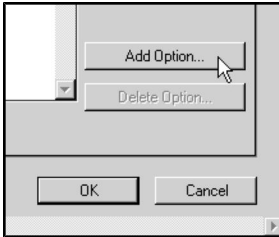
- Choose **Add New Option** from the **Finding Items** drop-down menu.

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

- The **Add New Item Option** dialog opens.

- Type the text that the user will select when entering this Finding on a Patient History into the **Description** field.

- Click **OK** to save this option. DVMAX will save your Item Option and present another empty **Description** field. You can enter as many options as you like by typing descriptions and clicking **OK**.

-OR-

- Click **Cancel** to save this option and close the **Add New Item Option** dialog. DVMAX will return you to the **Finding Item** dialog. The options you added will be listed in the **Options** area of the **Finding Item** window.
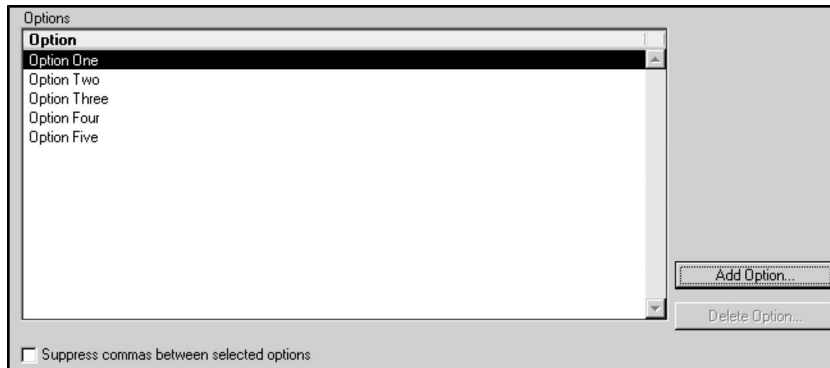

Reordering Finding Item Options

When placing a Finding on a patient history, DVMAX will present items in the order they are listed in the Options area of the Finding Item record. You can specify the order in which Finding Item Options will be presented when adding a Finding to Patient History.

To reorder Finding Item Options:

- In the Options area of the Finding Item window, click and hold the mouse button down on the Option you wish to move.
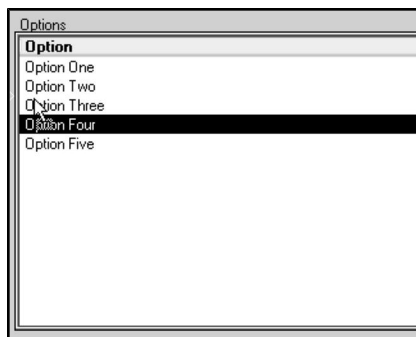
● Drag the item in the list to the spot where you wish to place it. A small arrow appears to the left of the list while you are dragging. This arrow indicates where the item will be placed when you release the mouse button.

⚠ If you change the design of a Finding Class after you have created and used it, patient histories that have already used that Finding will not be altered or updated. Future entries will use the changed design.
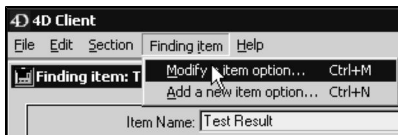
Modifying a Finding Item Option

To modify a Finding Item Option:

● Double-click the Option you wish to change in the Options list of the **Finding Item** window.
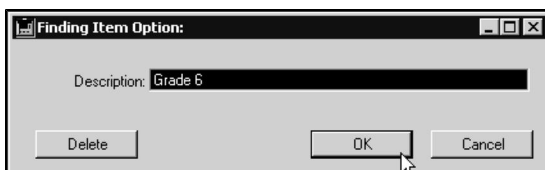

-OR-
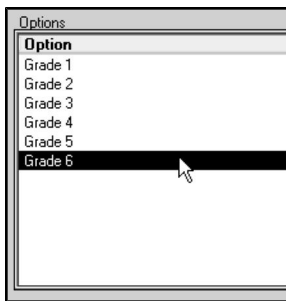
● Click once to select the Option you wish to change in the Options list.

● Choose **Modify Item Option** from the **Finding Item** drop-down menu.

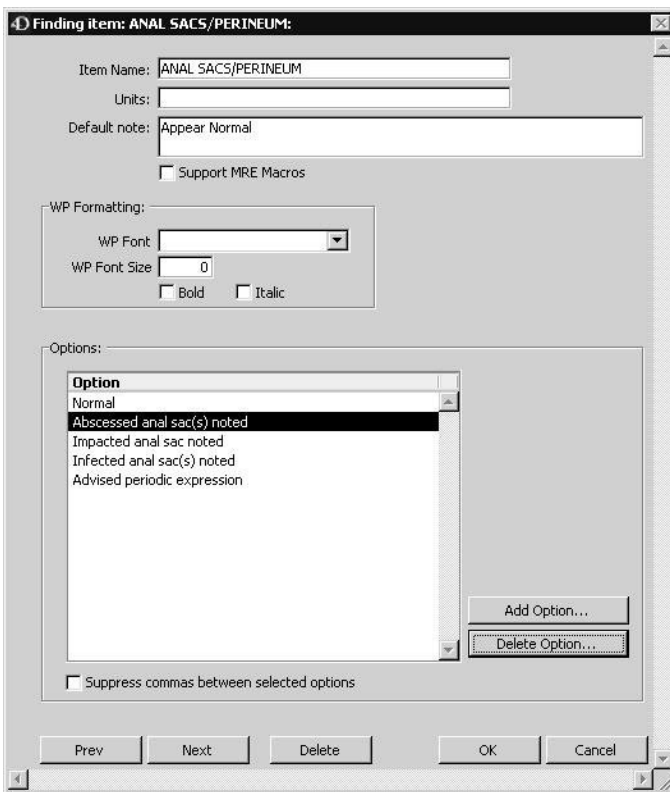● The **Finding Item Option** dialog displays.

- Type your changes in the **Description** field.
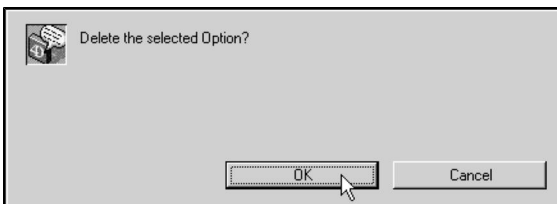- Click **OK** to save your changes.

Deleting a Finding Item Option

To delete an Option from a Finding Item:

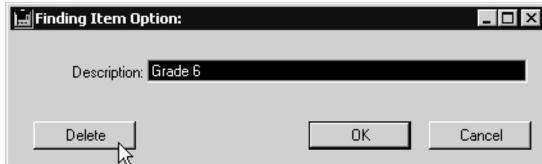- Click once to select the Option you wish to delete from the **Options** list.

- Click **Delete Option**.
- DVMAX will ask you to confirm that you wish to delete this option.

- Click **Delete.** The confirmation dialog closes, and the Option is removed from the list.

ℹ️ You can also delete a Finding Item Option from the **Modify Finding Item Option** dialog, by clicking the **Delete** button.

**For more information on the Modify Finding Item Option dialog, see** Modifying a Finding Item**.**

⚠️ If you change the design of a Finding Class after you have created and used it, patient histories that have already used that Finding will not be altered or updated. Future entries will use the changed design.

Creating Finding Classes

Finding Classes are collections of Finding Items. In order to create a Finding Class, the component Finding Items must already have been created. For information on creating Finding Items, see **Creating Finding Items**.

To create a Finding Class:

- Choose **Patient Codes** from the **Section** drop-down menu.
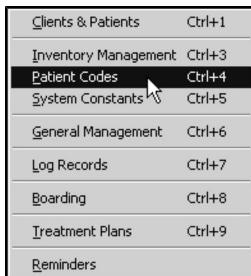
- From the **Find** window, choose **Finding Class** from the **Search For** drop-down list.
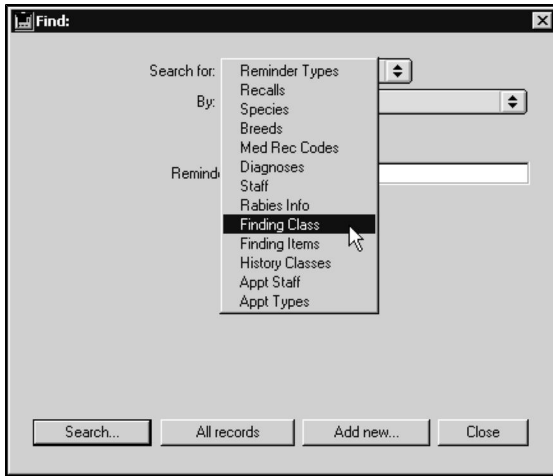

- Click **Add New** at the bottom of the **Find** window.
- From the **New Finding Class** window, type a unique code for this Finding Class into the **Class Code** field. The code is used to identify and select this Finding Class, and can be up to 12 characters long.
- Type a name for this Finding Class into the **Class Name** field.
- Click **Add Item** to add Finding Items to this Finding Class. See **Linking Finding Items to a Finding Class** for more information.

-OR-
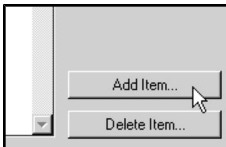
- Choose **Add New Linked Finding Item** from the **Finding Class** drop-down menu to add Finding Items to this Finding Class. See **Linking Finding Items to a Finding Class** for more information.
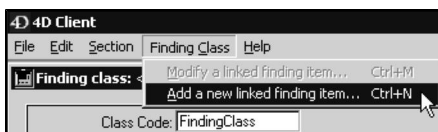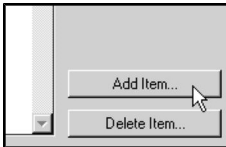
- Click **OK** to save the new Finding Class.

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


Linking Finding Items to a Finding Class

You can add as many Finding Items as necessary to a Finding Class. To link or add Finding Items to a Finding Class:


- Click **Add Item**.

-OR-

- Choose **Add New Linked Finding Item** from the **Finding Class** drop-down menu.
- From the **Add New Finding Item** dialog, type the name of a Finding Item into the **Description** field. This name must be the name of an existing Finding Item.
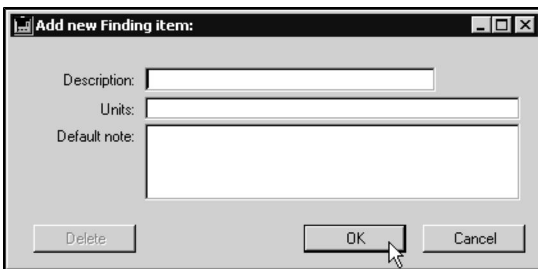
ⓘ CONTROL+N (COMMAND + N on Macintosh) is a keyboard shortcut for **Add New Linked Finding Item**.

ⓘ If you do not know the full name of the Finding Item you wish to link, type as much as you know of the name and press TAB. DVMAX will present you with a list of Finding Items that match the partial name you typed.
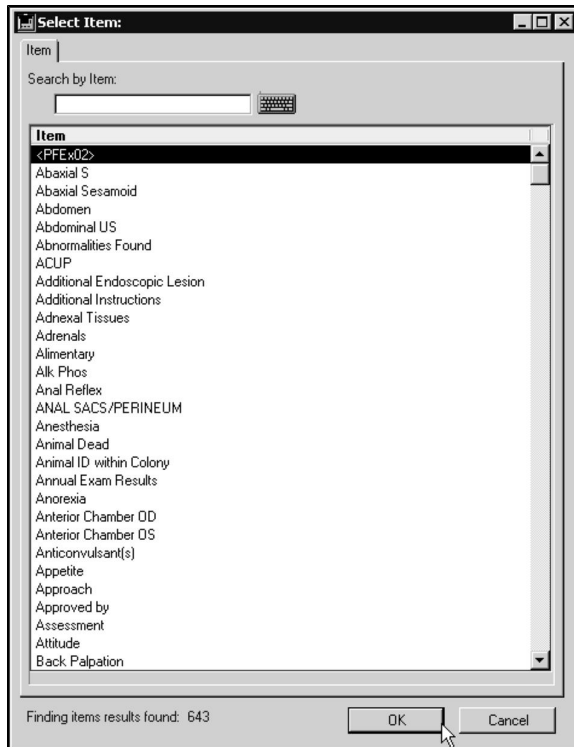
- If a Unit has not been defined for this Finding Item, you can type it now into the **Unit** field. For more information on Units, see **Creating a Finding Item**.

- If a default note has not been defined for this **Finding Item**, you can type it into the **Default Note** field. You can have a different default note for the same finding item when used with a different finding class. For more information on Default Notes, see **Creating a Finding Item**.

- Click **OK** to save this option. DVMAX will link this Finding Item and present a new, empty **Add New Finding Item** dialog. You can link as many Finding Items as you like by filling out the **Add New Finding Item** dialog and clicking **OK**.

-OR-

- Click **Cancel** to save this option and close the **Add New Finding Item** dialog. DVMAX will return you to the **Finding Class** screen. The Finding Items you linked will be listed in the **Linked Finding Items** area of the **Finding Class** screen.
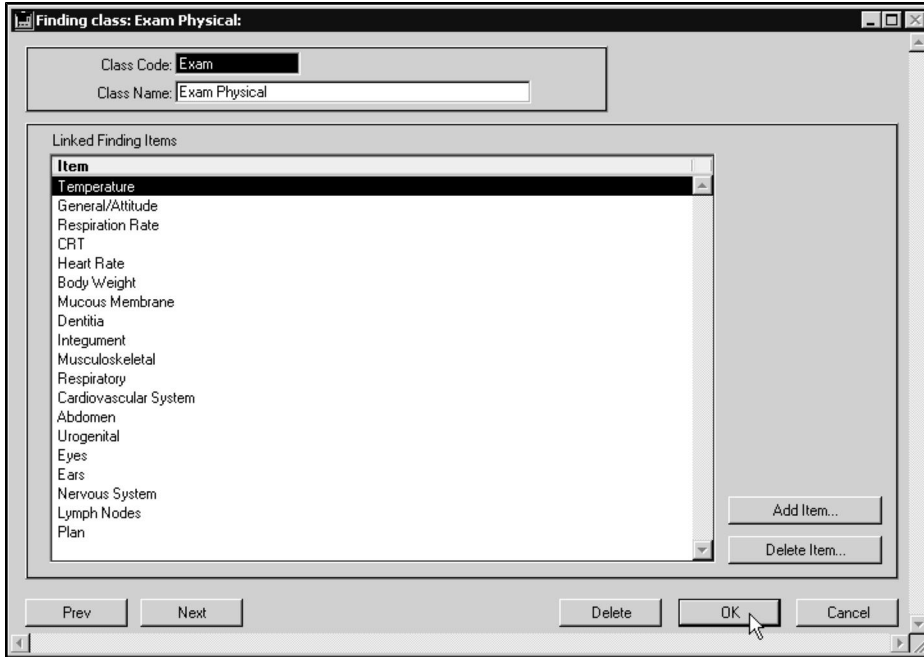
Reordering Linked Finding Items

When placing a Finding on a patient history, DVMAX will present Finding Items in the order they are listed in the Linked Finding Items area of the Finding Class screen.

You can specify the order in which Finding Items will be presented when adding a Finding to a Patient History.

To reorder Finding Items in a Finding Class:

- In the **Linked Finding Items** area of the **Finding Class** window, click and hold the mouse button down on the **Finding Item** you wish to move.
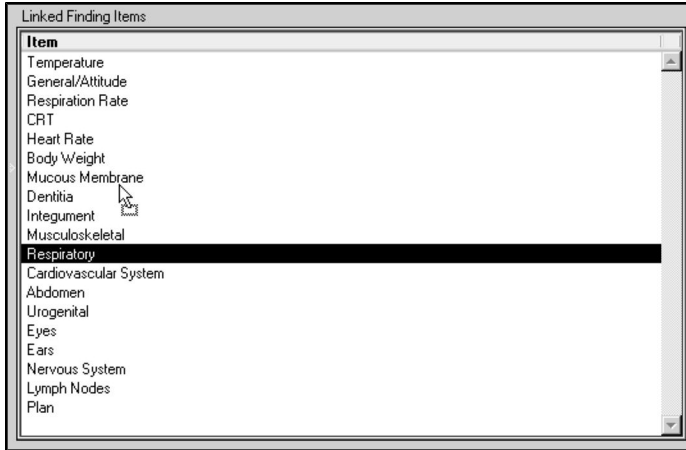
- Drag the item in the list to the spot where you wish to place it. A small arrow appears to the left of the list while you are dragging. This arrow indicates where the item will be placed when you release the mouse button.

⚠️ If you change the design of a Finding Class after you have created and used it, patient histories that have already used that Finding will not be altered or updated. Future entries will use the changed design.
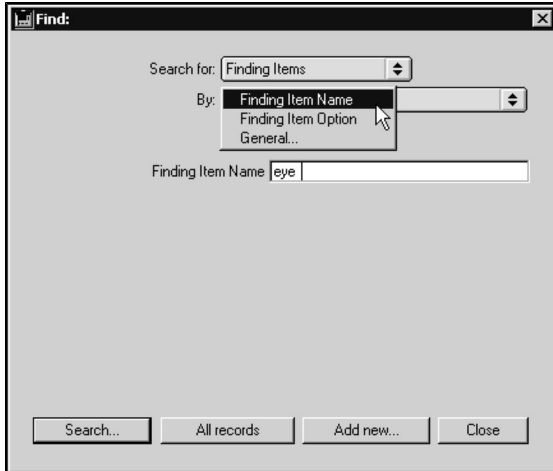
Search for a Finding Item Record

To find a Finding Item record in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu.
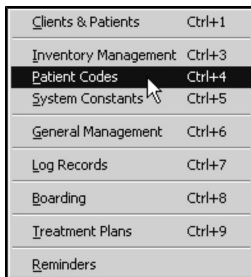
ℹ️ CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.

- From the **Find** window, choose **Finding Items** from the **Search For** drop-down list.

- Choose **Finding Item Name** from the **By** drop-down list to search Finding Item records by name. This will find a matching record if it contains the text you type anywhere in a Finding Item Name.

-OR-

- Choose **Finding Item Option** to find Finding Item records by looking for the text you type in any of the Item Options of a Finding Item record. This will find a matching record if it contains the text you type anywhere in its Options. See **Creating a Finding Item** for information on Finding Item Options.

- Type the text you wish to find into the field below the **By** drop-down list.

- Click **Search**.

- If there is more than one match for your search, the Finding Items List window will display a list of items that matched your search.
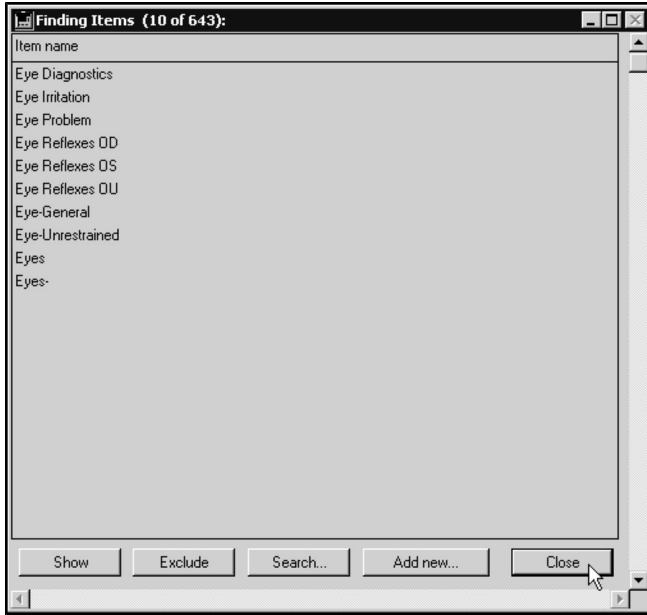
- If there is only one Finding Item that matches your criteria, DVMAX will open that Finding Item record.

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

ℹ️ You can also quickly locate a Finding Item by following the steps in Listing All Finding Items and double-clicking the one you are interested in from the list.

Search for a Finding Class Record

To search for a Finding Class record:

- Choose **Patient Codes** from the **Section** drop-down menu.
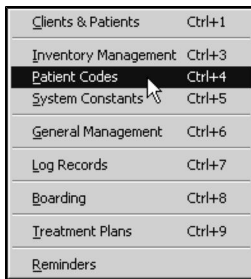
ℹ️ CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.

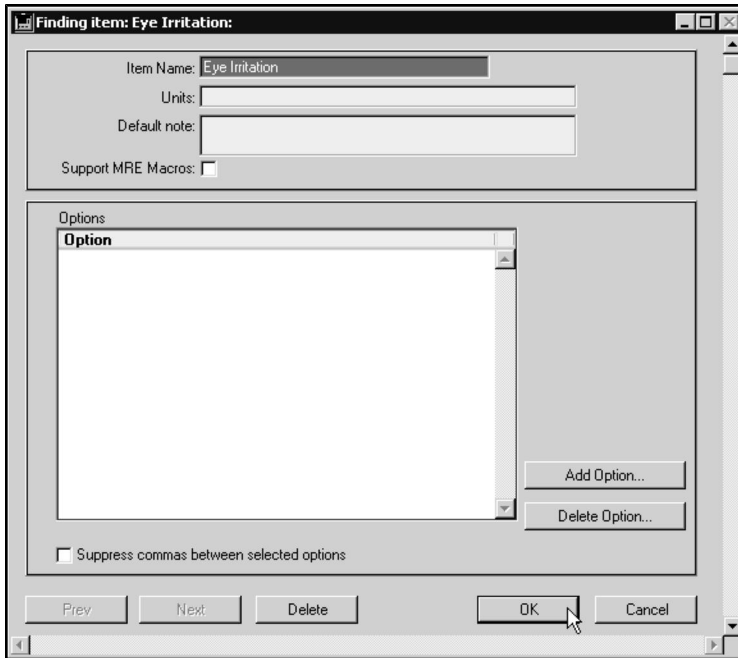- From the **Find** window, choose **Finding Class** from the **Search For** drop-down list.
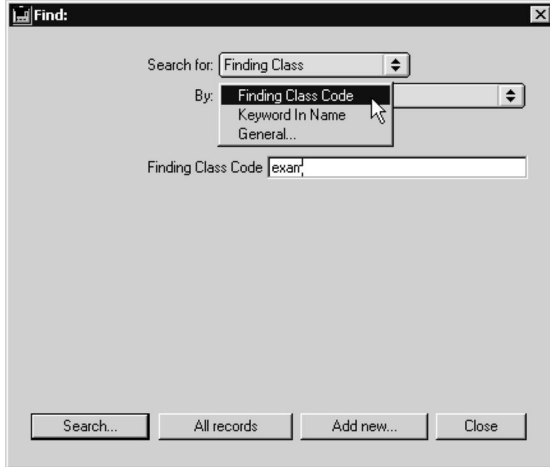
- Choose **Finding Class Code** from the **By** drop-down list to search Finding Class records by code. This will find any matching record whose code starts with the text you type.

-OR-

- Choose **Keyword in Name** to search for Finding Class records by name. This will find a matching Finding Class record if it contains the text you type anywhere in its Name.

- Type the text you wish to find into the field below the **By** drop-down list.

- Click **Search**.

- If there is more than one match for your search, the Finding Classes List window will display a list of items that matched your search.
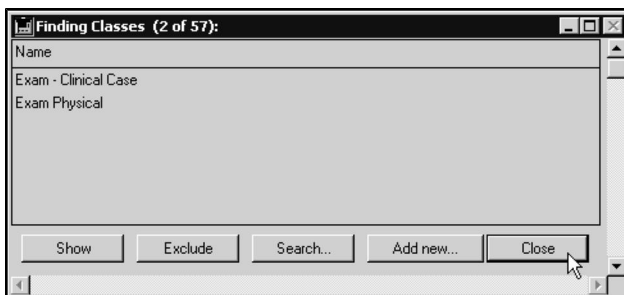
- If there is only one Finding Class that matches your criteria, DVMAX will open that Finding Class record.
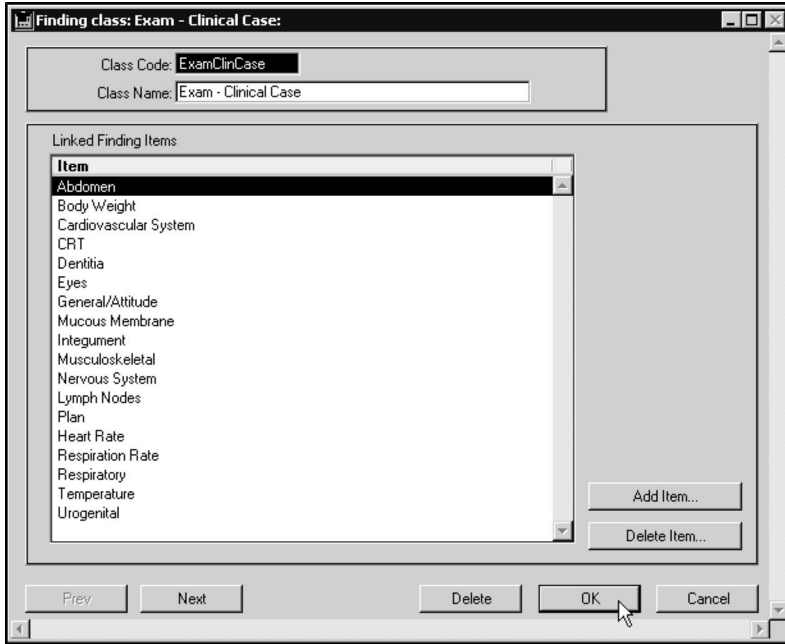
- If there are no matches, DVMAX will display a message to that effect and return you to the **Find** window to search again.
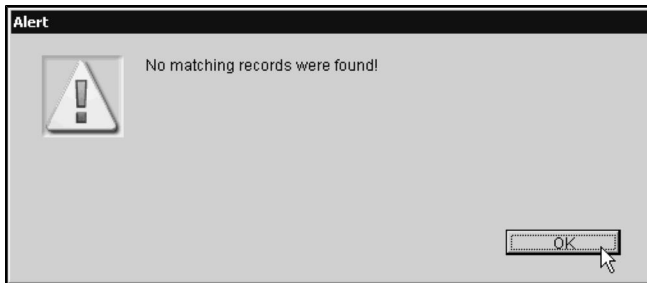

ⓘ You can also quickly locate a Finding Class by following the steps in Listing All Finding Classes and double-clicking the one you are interested in from the list.

List All Finding Item Records

To list all defined Finding Item records:

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

CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for Patient Codes.

- From the **Find** window, choose **Finding Items** from the **Search For** drop-down list.

- Click **All Records** at the bottom of the **Find** window. A list of all defined Finding Items displays.

- Each Finding Item record is listed on an individual line.

Listing All Finding Class Records

To list all defined Finding Class records:

- Choose **Patient Codes** from the **Section** drop-down menu.
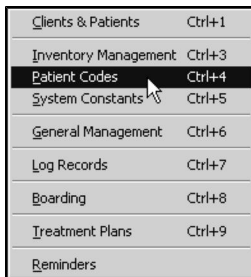
🛈 CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for Patient Codes.

- From the **Find** window, choose **Finding Class** from the **Search For** drop-down list.
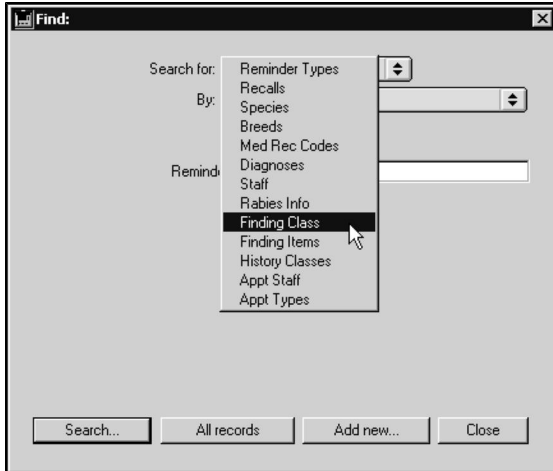
- Click **All Records** at the bottom of the **Find** window. A list of all defined Finding Classes displays.
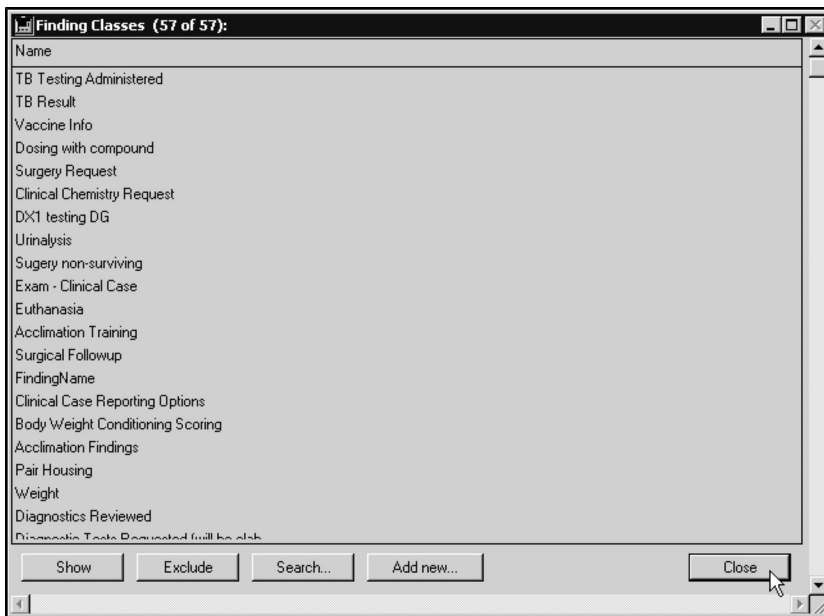
- Each Finding Class record is listed on an individual line.

Delete a Finding Item Record

To delete a single Finding Item record from DVMAX:

- Open the Finding Item record you wish to delete. See **Search for a Finding Item.**
- Click **Delete** at the bottom of the Finding Item window.

- DVMAX will ask if you want to delete the Finding Item. Click **OK** to continue or **Cancel** to keep the Finding Item.
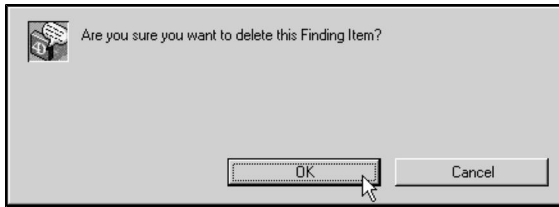
- DVMAX will ask you to confirm that you want to delete the Finding Item. Click **OK** to continue and delete the item.
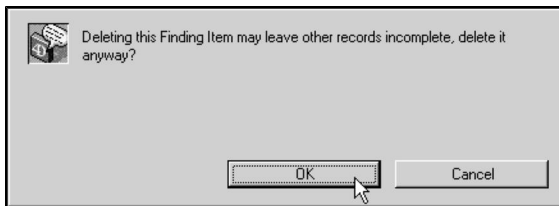
To delete multiple Finding Items from DVMAX:

- List all Finding Items (see **List All Finding Item Records**).
- Click to select the Finding Items you wish to delete.

ℹ️ Press and hold the SHIFT key to select multiple adjacent Finding Items from the list. Press and hold the CONTROL key to select multiple non-adjacent Finding Items.

- Choose **Delete Records** from the **Finding Items** menu.

- DVMAX will ask if you want to delete the Finding Items. Click **OK** to continue or **Cancel** to keep the Finding Item.

- DVMAX will ask you to confirm that you want to delete the Finding Item records. Click **Delete** to continue. The records will be deleted.

⚠ If you change the design of a Finding Class by deleting a Finding Item, patient histories that have already used that Finding will not be altered or updated. Future entries will use the changed design.

Deleting a Finding Class Record

To delete a single Finding Class record from DVMAX:

- Open the Finding Class you wish to delete. See **Search for a Finding Class Record.**
- Click **Delete** at the bottom of the Finding Class window.
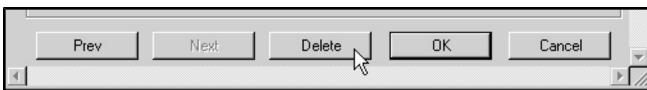
- DVMAX will ask if you want to delete the Finding Class. Click **OK** to continue or **Cancel** to keep the Finding Class.
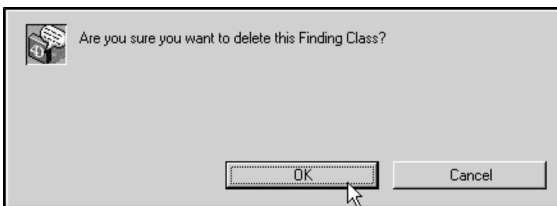
- DVMAX will ask you to confirm that you want to delete the Finding Class record. Click **OK** to continue. The record will be deleted.
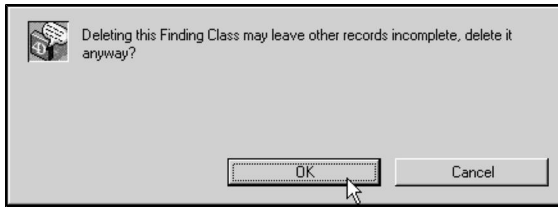
To delete multiple Finding Classes from DVMAX:

- List all Finding Class records (see **List All Finding Class Records**).
- Click to select the Finding Class records you wish to delete.

ℹ Press and hold the SHIFT key to select multiple adjacent Finding Classes from the list. Press and hold the CONTROL key to select multiple non-adjacent Finding Classes.

- Choose **Delete Records** from the **Finding Classes** drop-down menu.

- DVMAX will ask if you want to delete the Finding Class. Click **OK** to continue or **Cancel** to keep the Finding Class records.
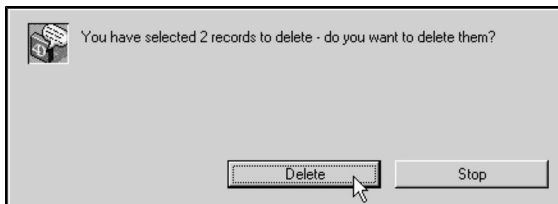
- DVMAX will ask you to confirm that you want to delete the Finding Class records. Click **Delete** to continue. The records will be deleted.

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⚠ If you delete a Finding Class, patient histories that have already used that Finding will not be altered or updated.

General Ledger Accounts

Use General Ledger Account records to assist you in managing your accounting and financial reporting. When General Ledger Account codes are linked to Bill Items (adding a GL Account code to a Bill Item record's **GL Account Code** field), DVMAX will be able to report on sales totals grouped by Account code (See GL Account Report under the **Custom Reports** chapter). The GL Report can be copy/pasted into Excel, and then imported into accounting software like Quickbooks.

Search for GL Account Records

To find a GL Account record in DVMAX:

- Select **Inventory Management** from the **Section** drop-down menu, then choose **GL Accounts** from the **Search For** menu.
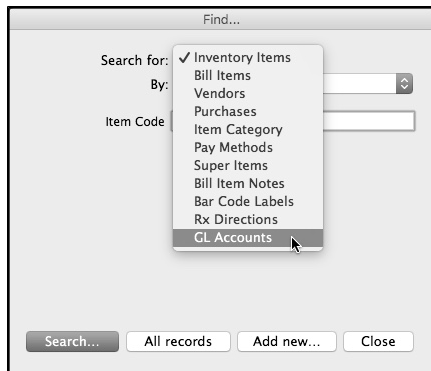
- From the **Find** dialog, choose a criterion (Account Code, Account Name, Internal Code, General) from the **By** drop-down list. See **Search Criteria** for more information.
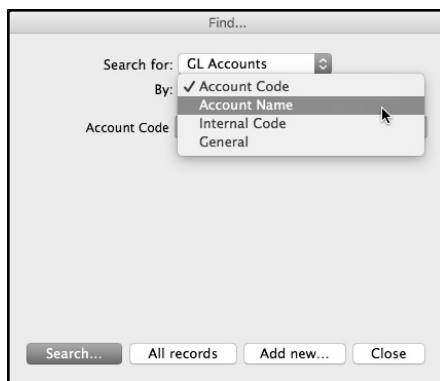
- If necessary, type requested details in the field provided. See **Search Criteria** for more information.

- Click **Search.**

- If there is more than one match for your search, the **GL Account** window will display a list of items that matched your search.

- If there is only one GL Account record that matches your criteria, that Account record will open.

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

GL Account Record Search Criteria

DVMAX provides several predefined ways to search for GL Account records. A description of each follows. You can also choose to use the General Search option and define your own search criteria. See the **General Searches** chapter for more information.

Search By Account Code

A **GL Account Code** search locates an account record using the record's code. If you do not know the entire code, type as much of the start of the code as you know and click **Search**. DVMAX will show a list of all items whose code starts with what you typed.

Search By Account Name

A **Name** search finds GL Account records using the record's Name field. Your search term does not need to be an entire word. Note that a Name search will only match from the start of the name – that is, you must know the exact start of the name to find any matches. This is not a "contains" search. Use the General search for that search type.

Search By Internal Code

An **Internal Code** search locates an account record using the record's internal code. If you do not know the entire code, type as much of the start of the code as you know and click **Search**. DVMAX will show a list of all items whose code starts with what you typed.

About the General Ledger List

The General Ledger list shows all GL Account records that match your search. You can see at a glance a record's code, name and internal code.

To select and view a record from the General Ledger list:

- Double click the GL Account record you wish to view

-OR-

- Click once on the GL Account record you wish to view, and then click **Show**.

Creating a New GL Account Record

To create a new GL Account record:

- From the **Section** drop-down menu, choose **Inventory Management**.
- From the Find window, select **GL Accounts** from the **Search For** list.
- Click **Add New**. A new General Ledger window opens.

- Type a unique account code in the **Account Code** field. The code can be up to 20 characters long. This is typically a numeric code.

- Type a name for the record in the **Account Name** field. This is a brief name or description you want to give to the record. The name can be up to 30 characters long.

- In the **Internal Code** field, type a unique code for the account record. This could be a short version of the Account Name.

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

Modify or Edit Child Items

You can modify or edit GL Account records. Keep in mind that any changes may leave other records linked to the Account record incomplete.

To edit an Account record:

- Open the Account record you wish to modify.

- Make changes to the relevant field(s).

- Click **OK** to save your changes or **Cancel** to revert the changes.

⚠️ Modifying GL Account records can have serious effects on your sales and accounting data. If you are unsure about whether to modify a record, please contact DVMAX Technical Support.

Deleting a GL Accounts Record

To delete a GL Account record:

- Find the GL Account record(s) you wish to delete by following the steps in **Search for GL Accounts**

- Open the record.

- Click the **Delete** button at the bottom of the GL Account record.

-OR-

- From the list of GL Account records, select the record(s) you wish to delete.

- Choose **Delete Records** from the **GL Accounts (Pay Methods)** drop-down menu.

⚠️ Deleting GL Account records can have serious effects on your sales and accounting data. If you are unsure about whether to delete a record, please contact DVMAX Technical Support.

Linking a GL Account to a Bill Item

Linking a GL Account to a Bill Item record will allow you to report on sales totals grouped by Account code using DVMAX reporting features. You need to create your GL Account records before you can link them to a Bill Item record.

To link a Bill Item and a GL Account:

- From the **Section** drop-down menu, choose **Inventory Management**.
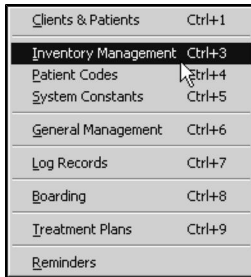
- From the Find window, select **Bill Items** from the **Search For** list.
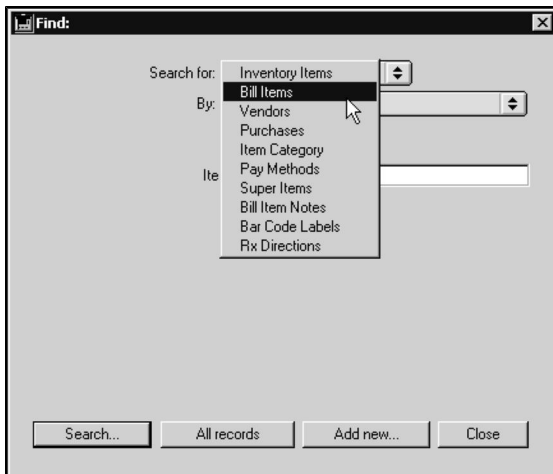
- Use the search features to locate the Bill Item you want to link to a GL Account.

- In the **GL Account Code** field, type the Account Code you want to link to the Bill Item, or click the Lookup icon beside the field to display a list of GL Account Codes and choose the code you want.

Performing a General Search

The ability to find the right information quickly is an important part of running your practice efficiently. DVMAX anticipates the most common lookups you will need by making them available in drop-down lists in the **Find** window. The **Find** window displays when you choose **Clients and Patients**, **Inventory Management**, **Patient Codes** or **Log Records** from the **Section** menu.

There may be times when you will want particular information not supplied by a common search option. For these cases, DVMAX provides a **General Search** option that allows you to create a custom query based on your own combination of available search fields. Note that the user interface for the **General Search** has a new look since the release of DVMAX version 8.6. The query options remain virtually identical, but the layout of the Query dialog has been revised.

Choosing the General Search Option

You can access the **General Search** function by choosing **General** from the **By** drop-down list in the **Find** window, and clicking **Search**.

For example, to perform a General Search for a client or related record:

- Choose **Clients and Patients** from the **Section** menu of the DVMAX main screen.
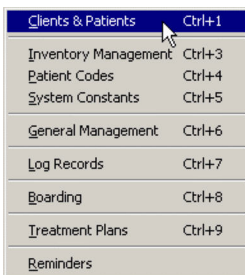
- From the **Find** dialog, click the **By** drop-down list and choose **General**.
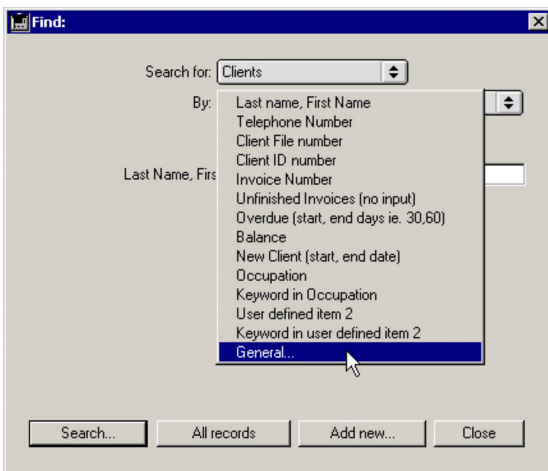
- Click the **Search** button to open the **General Search** dialog.

ℹ The exact contents of the **General Search** dialog depends on which section you have opened it from, and your selection in the **Search For** drop-down list. For example, you cannot perform a general search for a **Bill Item** if you have not opened the **General Search** dialog from the **Inventory Management** section. Similarly, you cannot perform a general search for a patient if you have selected **Clients** in the **Search For** drop-down list.

About the General Search Dialog

When the General Search (Query) dialog first opens, the default display is a single query line with 2 drop down menus (Find list and Operator selection) and a text-enterable Value field.

There are also menu options at the top of the dialog that will permit loading, saving or resetting custom queries, as well as ways to search a selection of data.

Building a Custom Query from the General Search Dialog

The **General Search** dialog allows you to conduct a custom query based on your own combination of a large number of available search fields.

To run a custom search:

- From the **General** dialog, choose the field on which to search from the **Find** list. Click the down arrow to display a list of available search options. The options shown will vary depending on which section of DVMAX you chose to search. For example, initiating a general search from Clients will present you with a different list of options than if you chose to search from Patients.

- Choose an operator from the next drop-down menu. This list identifies available criteria for the search value and has an up/down arrow beside the field. These criteria may include options like **is equal to** or **contains**. The list will vary based on the field you are searching.

- Type a search value, where applicable, in the Value field. For example, if you wanted to find all feline patients, you could select **Species Name** from the **Find** list, choose **is equal to** from the operator drop down and type **feline** in the Value field.

- Click the + icon to add another line and further refine the search. In front of the new row you will see a drop down containing **And**, **Or** and **Except**. Choose one of these and then continue with specifying additional criteria for your custom query. This option is especially useful when working with large numbers of records or when trying to find a specific record.

- Click **Query**.

ℹ The [Dynamic_Client] and [Dynamic_Patient] tables are available for use in custom reports and general searches.

Available Operators for Search Values

The following operators or criteria for search values are available under General Search. The list of search criteria will vary based on the field you are searching.

Is – The results returned will contain the exact value entered in the search criteria field

Is not – The results returned will contain results that contain everything except the value entered in the search criteria field

Contains – The results returned will include any items that have the characters entered in the search criteria field

Does not contain – The results returned will include any items that do not have the characters entered in the search criteria field

Starts with – The results returned will include any items that have the characters entered in the search criteria field at the beginning of the field being searched

Ends with – The results returned will include any items that have the characters entered in the search criteria field at the end of the field being searched

Is empty – The field contains no data

Is not empty – The field contains data

Contains word(s) - Searches for the keyword(s). After entering the keyword(s), you have a choice between "all words" (the field must contain all the words entered) or "some words" (the field must contain at least one of the words entered).

Does not contain word(s) – Will return results that don't contain the word(s) entered in the value field

Is or is after – When searching for a date or time, this option will search for values that are equal to or greater than the value entered in the value field

Is after - When searching for a date or time, this option will search for values that are greater than the value entered in the value field

Is or is before - When searching for a date or time, this option will search for values that are equal to or less than the value entered in the value field

Is before - When searching for a date or time, this option will search for values that are less than the value entered in the value field

Is between – This option will search for values between the two search options entered, including the values entered

Is between (excluded) - This option will search for values between the two search options entered, and NOT include the values entered

Equals – Will search for an exact match to the search value entered

Is different from – When searching for a number value, this option will return results that are not equal to the value entered

Is greater than or equal to – When searching for a number value, this option will return results that are greater than or equal to the number entered in the search criteria field

Is strictly greater than - When searching for a number value, this option will return results that are only greater than and not including the number entered in the search criteria field

Is lower than or equal to - When searching for a number value, this option will return results that are less than or equal to the number entered in the search criteria field

Is strictly lower than - When searching for a number value, this option will return results that are only less than and not equal to the number entered in the search criteria field

Is between - This option will search for values between the two search options entered, including the values entered

Is between (excluded) - This option will search for values between the two search options entered, and NOT include the values entered

Is today – Searches for current date

Is within current - Possible values: - week (Sun-Sat) - week (Mon-Sun) - week (Mon-Fri) - month - quarter - year. These values are calculated with respect to the current date.

Is yesterday – Searches for day earlier than the current date

Is within last - Possible values: - hours - minutes - seconds. These values are calculated with respect to the current time.

Is within the last – Searches within a given time frame. These values are calculated with respect to the current date.

Is tomorrow – Searches for the day following the current date

Is within next – Searches upcoming time frames. Possible values: - hours - minutes - seconds. These values are calculated with respect to the current time.

Is within the next – Searches within upcoming date ranges

Is up to - The field value is less than or equal to the value entered

Is before - The field value is strictly less than the value entered

Starts from - The field value is greater than or equal to the value entered

Is after - The field value is strictly greater than the value entered

Is between - The first date must be prior to the second. The query finds fields containing the dates entered (inclusive)

Is after and before - The first date must be prior to the second. The query does not find fields containing the dates entered (exclusive)

General Searches Using the Terms And, Or, Except

If your general search contains more than one line, you will need to use at least one of the **And, Or**, or **Except** conjunction operators. Here is what each means:

And - This operator finds all the records that meet two conditions simultaneously. For example, the query "Find all the clients with pugs *and* who have outstanding invoices" will find all pug owners who owe you money.

Or - This operator finds all the records that meet either of two simple queries. For example, the query "Find all the clients with pugs *or* who have outstanding invoices"

will find all your clients who are pug owners, as well as all the clients who owe you money regardless of what kind of animal they own.

Except - This operator is the equivalent of "not." The query "Find all the clients *except* those who own pugs" will exclude all clients with pugs.

Saving a General Search

If you will be performing a complex custom query with any frequency, you can save your search criteria to a file on your system and make it available to the General Search function at any time. To save a General Search formula:

- After building your custom query, click the Gear icon in the top left corner of the General Search dialog.

- From the Gear menu, select **Save**.

- Type a filename in the **Save As** field of the **Save** dialog. Select the folder location in which to save the file.

- Click **Save**.

Loading a Saved General Search

To load a saved General Search formula:

- Open the General Search dialog as described in *Choosing the General Search Option*.

- Click the Gear icon in the top left corner of the General Search dialog and choose Load fro the drop down menu.

- From the Load dialog, navigate to your saved search formula and click **OK**.

Copy General Search Formula to Clipboard

To copy a custom search formula to clipboard for use elsewhere.

- After building your custom query, click the **Gear** icon in the top left corner of the General Search dialog.

- From the Gear menu, select **Copy Formula to Clipboard**.

- Paste the formula in the desired location.

Reset General Search Criteria

To clear the custom search from the dialog and reset the search to initial default criteria:

- After building your custom query, click the **Gear** icon in the top left corner of the General Search dialog.

- From the Gear menu, select **Reset**.

- Search fields reset to initial default selection.

Create New Selection Options

The Create New Selection menu at the top of the General Search dialog provides a number of different ways to run a custom query on a selection of data.

Create New Selection – This is the default General Search option. Create New Selection will search the entire section of data based on criteria and values you specify.

Search in Selection – If you have already performed one search and then have chosen to do a second general search, **Search in Selection** will perform the next search only on the subset of data for which you already had displayed.

Add to Selection – If you have already performed one search and have chosen to do a second general search, **Add to Selection** will add the results of this search to the list of results generated with the previous search.

Remove from Selection – If you have already performed one search and have chosen to do a second general search, **Remove from Selection** will exclude the results of this search from the previous search results.

Recent Query Options

After you have performed at least one search, a **Recent Queries** menu option will be available. The last 10 searches performed on the workstation will be available from the pull-down menu.

General Search Example

The following example shows how to use the **General Search** option to generate a list of the year's top-spending clients:

- Choose **Client and Patients** from the **Section** drop-down menu on the DVMAX main screen.
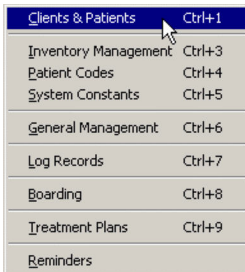
- From the **Find** dialog, select **General** from the **By** drop down list.

- Click **Search**. The **General Search** dialog opens.

- From the **Find** list, scroll down the list of fields until you see **Dynamic_Client**

- Click the arrow beside **Dynamic_Client** once. This will expand the list.

- From **Dynamic_Client** select **Spent_YTD**.

- From the operator list (the middle field), choose **is greater than or equal to** from the drop down menu.
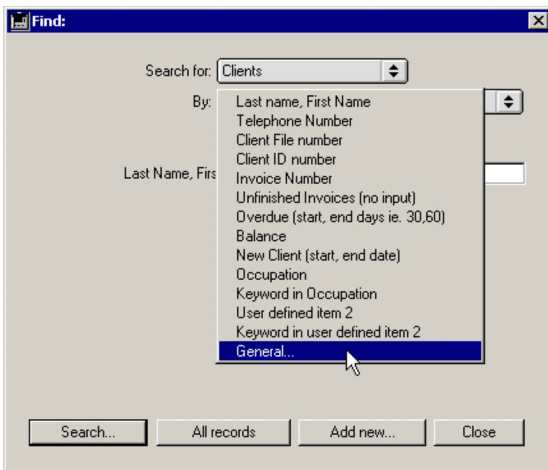
- Type a dollar amount in the **Value** field. Do not type the dollar sign ($).

- Click **Query**.

- A list of Client records with a Spent Year to Date history of greater than or equal to the amount you typed in the **Value** field will display.

- You can save the search formula using the **Save** option under the Gear menu.

- You can further narrow the data set using the options found under the **Create Selection** menu.

HealthyPet Reminders

What Are HealthyPet Reminders?

HealthyPet Reminders are professionally published reminders mailed to your clients on your behalf. HealthyPet reminders can be postcards, newsletters or the HealthyPet Magazine, each customized to list upcoming treatments at your veterinary clinic.

DVMAX can integrate its own powerful, internal reminder system with your HealthyPet account. This chapter provides instructions on how to send your DVMAX Reminders to Healthy-Pet. For more information on DVMAX Reminders, see the **Reminders** and **Patients** chapters of this manual.

Requirements

In order to send your DVMAX reminders to HealthyPet, you will need:

- A valid HealthyPet account number
- A connection to the internet on the computer running DVMAX.

Setting Up DVMAX to Send Reminders to HealthyPet

To set up the HealthyPet Reminder system in DVMAX, you will need to:

- Provide a valid HealthyPet account number
- Tell DVMAX to include the date with Reminders

To enter a HealthyPet Account number:

- Select *System Constants* from the *Section* menu on the DVMAX main screen.
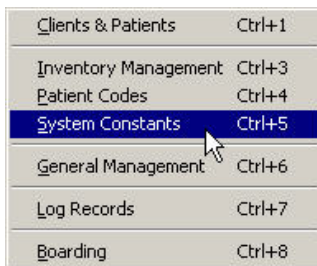
- From the *System Constants* menu, choose *Default Constants*. Alternatively, click the *Default Constants* tab.
- On the *Default Constants* tab, type a valid HealthyPet account number in the *HealthyPet Account #* field.
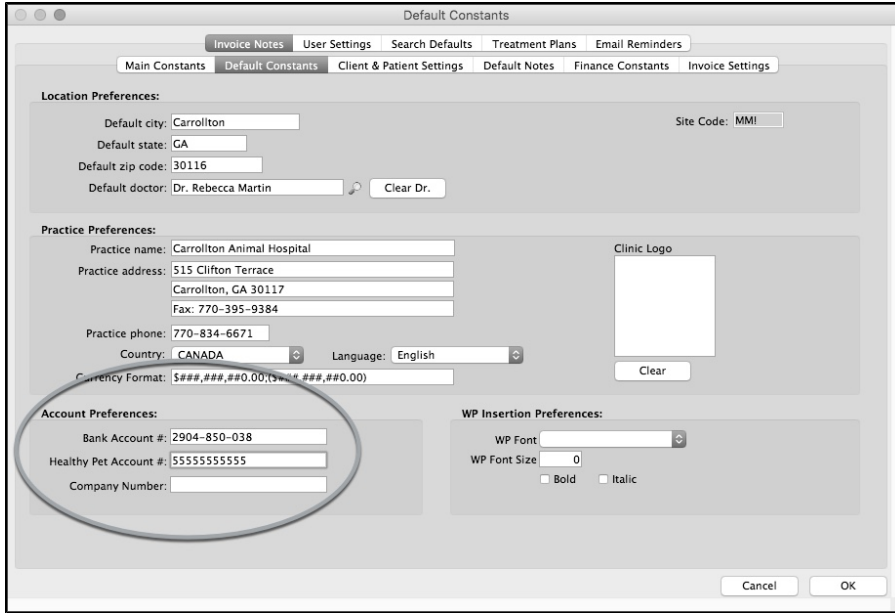
- Click *OK* to save your account number.

- From the *System Constants* menu, choose the *Clients & Patients* tab. Alternatively, click the *Clients & Patients* tab.

- From the *Clients & Patients* tab, select *With WP Reminders* under the *Include Dates* heading.
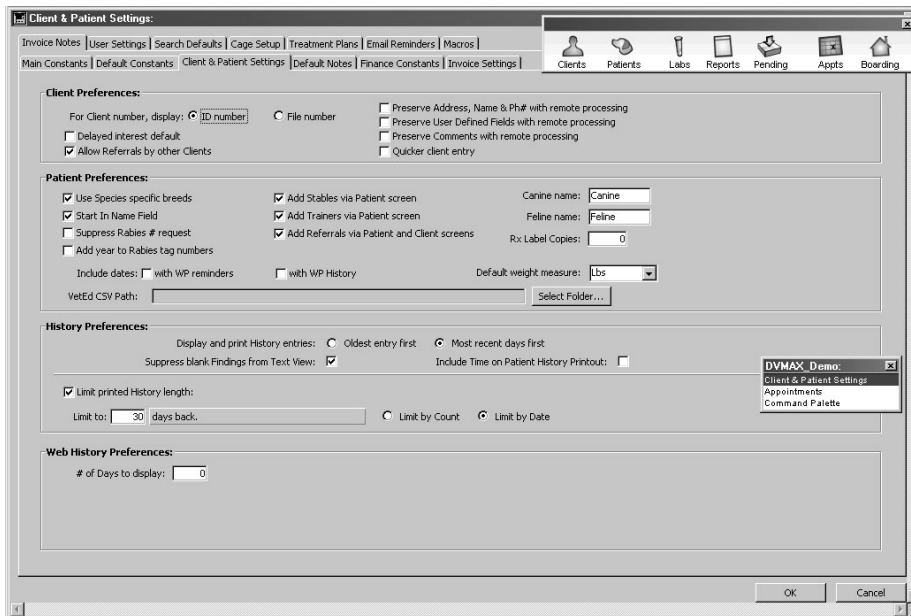
- Click *OK* to save the *Include Dates with WP Reminders* setting.

- Click *OK* to exit System Constants.

Sending DVMAX Reminders to HealthyPet

DVMAX uses the internet to send your Reminders to HealthyPet. The process is simple: you tell DVMAX the range of dates for which you want to send reminders, and DVMAX scans all patient records, removes inactive clients, and sends valid reminders to HealthyPet.

To send DVMAX Reminders to HealthyPet:

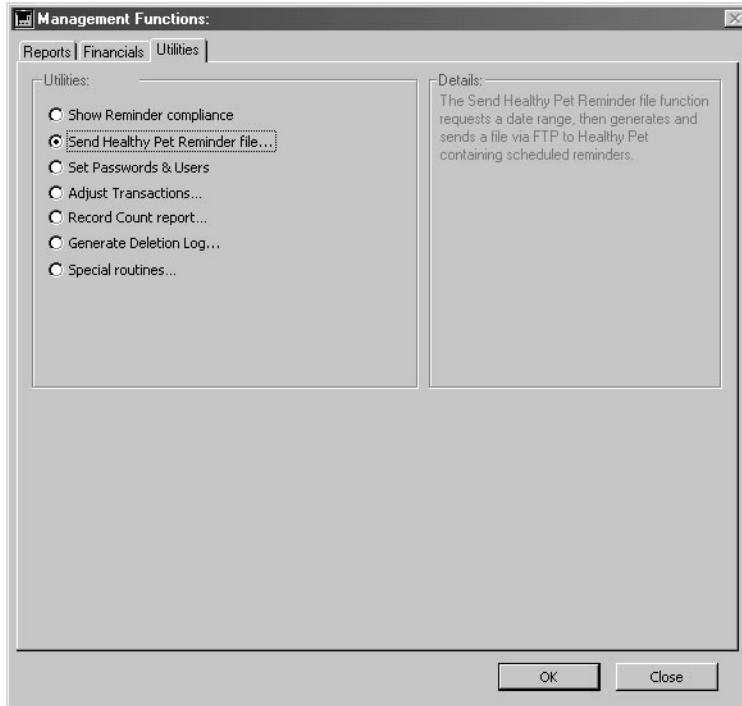- Choose *General Management* from the *Section* menu on the DVMAX main screen. The *Management Functions* screen appears.

- Select the *Utilities* tab from *Management Functions*.

- From the *Utilities* tab, select *Send HealthyPet Reminder File*

- Click *OK*. The *Date Range Entry* opens.

- Type the first day for which you wish to send Reminders into the *Starting Date* field. Type the last day for which you wish to send Reminders into the *Ending Date* field.

- Click *OK* to have DVMAX send your Reminders to HealthyPet.

- DVMAX will notify you when your Reminders have been sent.

- If there were errors sending the Reminders, DVMAX will notify you of these as well.

Technical Details

DVMAX uses FTP (File Transfer Protocol) to send your Reminders to HealthyPet. The relevant FTP information is as follows:

- Server address: ftp.dvmreminder.com.
- User name: dvmax
- Password: 3pfg45
- Remote directory: /home/dvmax/incoming

When you tell DVMAX to send your Reminders to HealthyPet, DVMAX creates a temporary file containing your Reminders on your computer. DVMAX then uses FTP to send this file to the HealthyPet FTP server.

The name of this file is a combination of your HealthyPet account number followed by a Date and Time Stamp. If you are using DVMAX SU, DVMAX will save this file in the same directory as your structure file. If you are using DVMAX Client, DVMAX will save this file in the same directory as the DVMAX client application.

DVMAX deletes the temporary file after sending it to the HealthyPet FTP server.

History Classes

You can use History Classes to categorize or group Diagnosis Codes and Medical Record Codes. History Classes allow you to insert items from a Patient's history in organized and related sections into a Word Processing document.

History Classes are used on the Word Processing tab of the Patient record. You can insert MREs or Diagnoses according to History Class from the **WP Palette** in a Patient WP document. For more information, see **Working with Patient Records**.

You can set up unlimited History Classes in any way that is useful to your practice. For example, you may want to set up History Classes for Examination Procedures, Dental Procedures, Anesthesia, or Discharge Comments.

ℹ️ Using a small number of History Classes is more manageable (and usable) than maintaining a large list.

For information on including a Medical Record Entry in a History Class, see **Medical Record Entries.** For information on including a Diagnosis in a History Class, see **Diagnoses.**

Add a New History Class Record

To add a new History Class in DVMAX:

- Choose **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	

ℹ️ CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.

- From the **Find** window, choose **History Classes** from the **Search For** drop-down list.

- Click **Add New** at the bottom of the **Find** window. The **New History Class** record dialog opens.
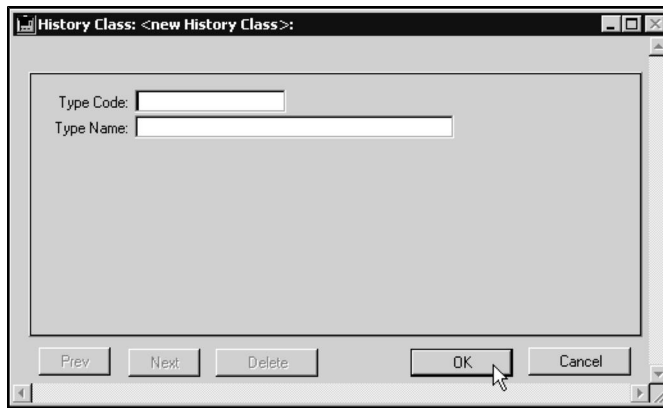
- Type a unique code for this History Class record into the **Type Code** field. This code can be up to 12 characters long.

- Type the name you want to assign this History Class record in the **Type Name** field.

- Click **OK** to save the History Class record.

Search For History Class Records

To find a History Class record:

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

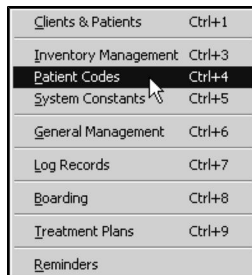ⓘ CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.

- From the **Find** window, choose **History Classes** from the **Search For** drop-down list.
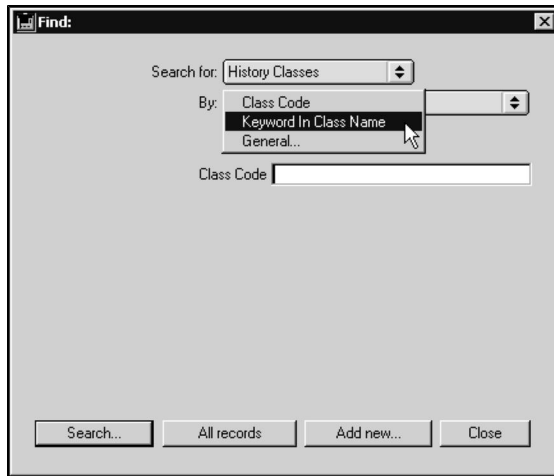
- Choose **Class Code** or **Keyword in Class Name** from the **By** drop-down list.

- Type a History Class code or a word from a History Class name into the field below the **By** drop-down list.

ⓘ If you are searching by code, type as much of the start of the code as you know. DVMAX searches History Class codes from the beginning of the code.

- Click **Search.**

- If there is more than one match for your search, the History Class List window will display list of records that matched your search criteria.

- If there is only one History Class record that matches your criteria, DVMAX will open that record.

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

ℹ You can also quickly locate a History Class by following the steps in List History Class Records and double-clicking the one you are interested in from the list.

List History Class Records

To list all History Class records:

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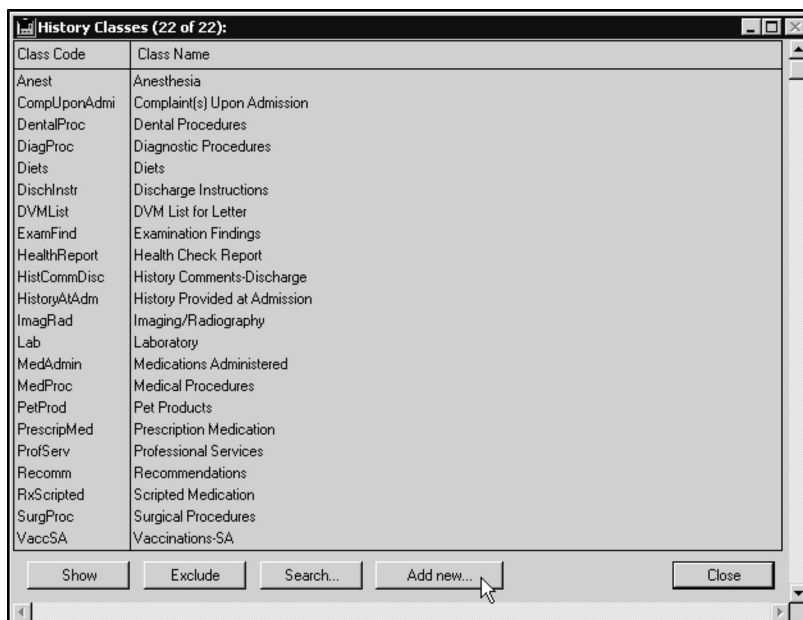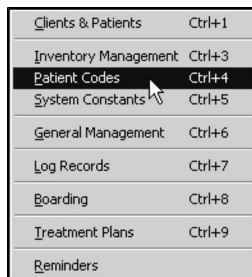

ℹ CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for Patient Codes.

- From the **Find** window, choose **History Classes** from the **Search For** drop-down list.

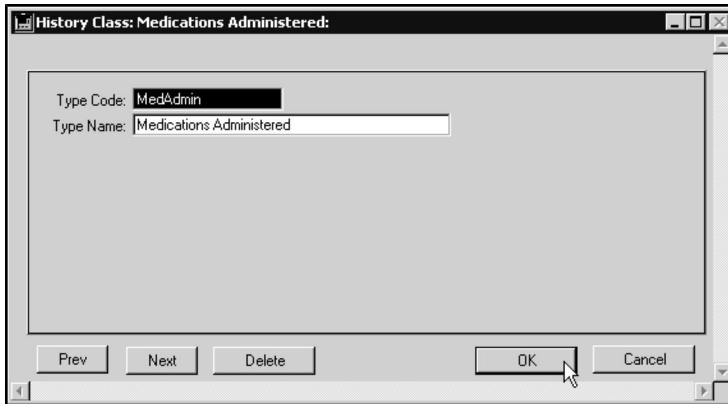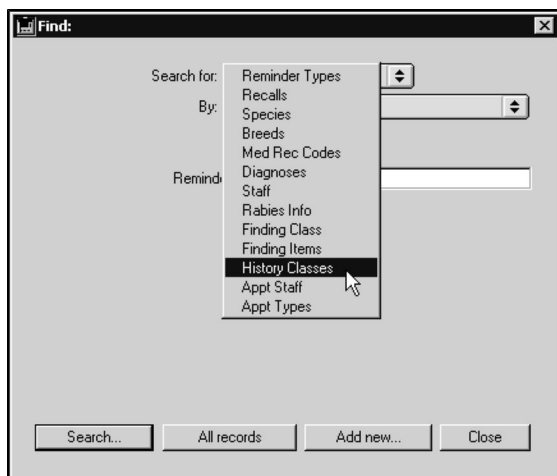- Click **All Records** at the bottom of the **Find** window. A list of all defined History Class records displays
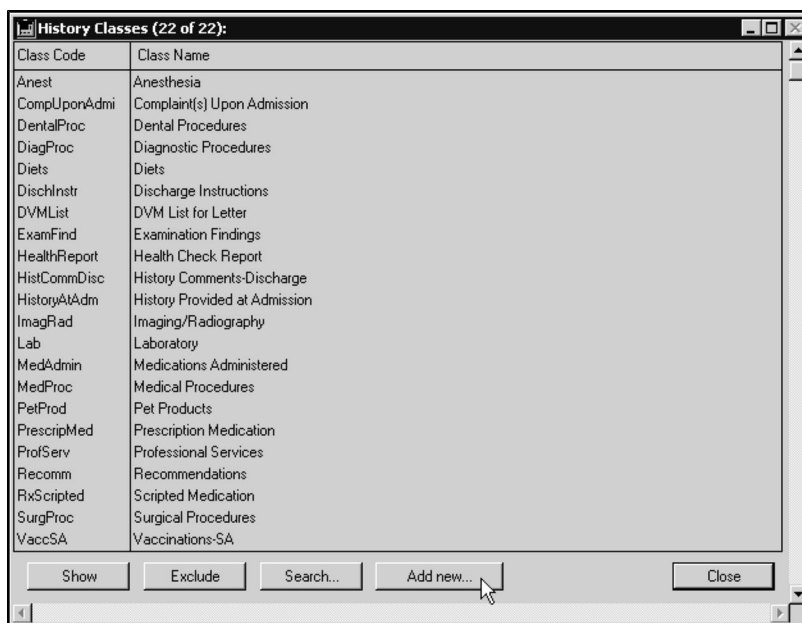
- Each History Class record is listed on an individual line, with columns for **Class Code** and **Class Name**.

Delete a History Class Record

To delete a single History Class from DVMAX:

- Open the History Class record you wish to delete. See **Search for a History Class Record.**

- Click **Delete** from the bottom of the History Class dialog.

- DVMAX will ask you to confirm that you want to delete the History Class record.

- Click **OK**.

To delete multiple History Class records:

- List all History Classes (see **List All History Class Records**).
- Click to select the History Class records you wish to delete.

 Press and hold the SHIFT key to select multiple adjacent History Classes from the list. Press and hold the CONTROL key to select multiple non-adjacent History Classes.

- Choose **Delete Records** from the **History Classes** menu.

- DVMAX will ask you to confirm that you want to delete the History Class.
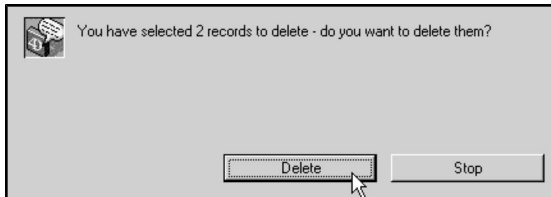
- Click **Delete**.

Integrations, Requisitions and Lab Results

DVMAX allows you to submit lab, Cubex and IDEXX Web PACS requisitions, as well as automatically import test results from in-house lab instruments and external lab sources into patient records. You can also configure DVMAX and rVetLink integration from the Integrations Setup Wizard. This chapter addresses working with requisitions and lab results integration, as well as Cubex and rVetLink integration.

The **Integrations Setup** features apply to IDEXX Reference Lab, IDEXX VetLab Station Network, IDEXX Web PACS, IDEXX rVetLink, Cubex and Antech/Zoasis. Using the Integrations Setup Wizard, you can configure DVMAX to submit requisitions and, where applicable, generate printable requisition forms for the associated provider(s). The Integrations functionality also includes a **Reconciliation** feature, which compares what was requested to the results received (applicable lab functionality only). Reconciliation helps ensure charges associated with work or supplies ordered and received are correctly applied to an invoice.

The **Lab Result Setup** feature is divided in to two main areas: setup for the In-Office Analyzer (accommodates up to 2 instruments per workstation at one time) and configuring DVMAX to send requisitions and receive results from IDEXX, IDEXX VetLab Station Network, Antech/Zoasis and Marshfield. For more on using in-house blood analyzers, refer to the **Blood Analyzer** chapter in this User Guide.

⚠️ The Integration, Requisition and Lab Results functions must be set up before the features can be used. It is recommended that you review the contents of this **Integrations, Requisitions and Lab Results** chapter to configure the features are applicable to your practice. For practices using the older SecureRAD integration, refer to the **DVMAX PACS Link** chapter.

The Lab Result Setup Facility

Before any lab results can be sent to DVMAX, the lab result function must be properly configured.

To open the **Lab Results Setup** facility:

- From the **File** menu, choose **Preferences**.
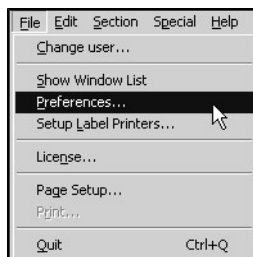
- From the DVMAX **Preferences** window, choose the **Lab Result Setup** tab.

⚠️ For **In-House Analyzers**, there can be only 2 instruments per terminal, so if you have more than 2 instruments in use at your location, you will need to have additional terminals based on the number of instruments you have running.

⚠️ For **Antech/Zoasis**, **Marshfield** accounts, only 1 workstation needs to have Check for Results details (folder path and time between checks) and account credentials entered, unless your clinic has multiple external lab accounts for one or more of those providers. All stations will, of course, be able to access the Labs log (requisition records and results records) and see any returned results in patient records.
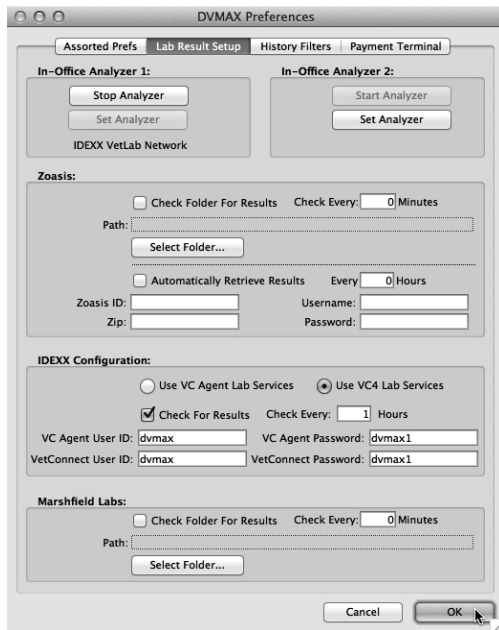
⚠️ For **IDEXX Reference Lab**, only 1 workstation will need to be configured to check for results. All stations will, of course, be able to access the Labs log (requisition records and results records) and see any returned results in patient records.

About the Lab Result Setup Window

The **Lab Result Setup** window is divided into 4 main areas, **In-Office Analyzer(s)**, **Antech/Zoasis, IDEXX,** and **Marshfield Labs** set up. You cannot send lab requisitions or import lab results until you have properly configured the corresponding lab result features in DVMAX.
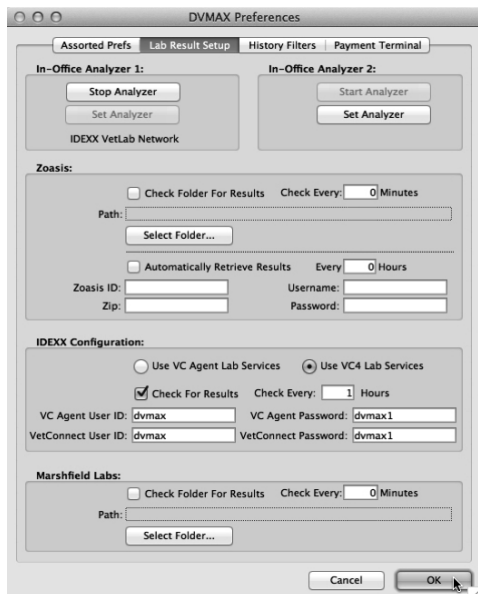
Setting Up an In-Office Blood Analyzer

The **In-Office Analyzer** feature lets you connect up to 2 in-house lab instruments per work-station and configure DVMAX to allow test results from those instruments to be directed to the associated patient file(s). A basic overview of the steps needed to enable the **In-Office Analyzer** function is given below. Further details about each step are documented in related sections in this chapter.

ⓘ For more on setting up the In-Office Analyzer, see the chapter on **Blood Analyzers**.

To configure DVMAX to receive results from an **In-Office Analyzer**:

- From the **In-Office Analyzer 1** area, click **Set Analyzer.** This will open a **Select Analyzer** window.
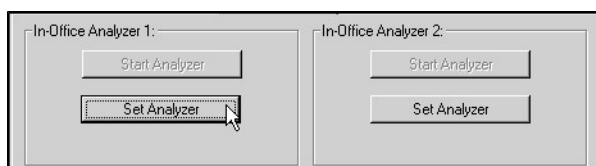
- From the **Analyzer** drop-down list, select the analyzer you have connected to your system. See **Select an Analyzer** for more detail on this step.

- From the **Port** drop-down list, select the computer port to which the analyzer is connected. See **Select a Port** for more detail on this step.

- Click **Select**.

- To enable DVMAX to receive results from the analyzer, click **Start Analyzer** from the **Lab Results Setup** tab the **In-Office Analyzer 1** area. See **Start the In-Office Analyzer** for more information.

- To configure a second in-house lab instrument, select **Set Analyzer** from the **In-Office Analyzer 2** area and repeat the steps listed above.

- Once you have configured the In-Office Analyzer setup, run the blood analysis on the lab instrument(s) as usual.

- Click **OK** from the **Lab Results Setup** tab to save settings in **Preferences** and close the **Preferences** window.

- DVMAX's lab results function automatically places lab results in the associated patient file. Select the **Lab** icon from the **Command Palette** to review lab log records for requisitions and results.

ⓘ Once the **In-Office Analyzer** function has been set up, you do not need to set it up again, unless you change analyzers or make other changes to the equipment.

Select an In-Office Analyzer

The **Select Analyzer** window includes a list of all laboratory and blood analysis instruments that are supported by DVMAX's direct importing feature. This list may include instruments that are not presently available in your office.

To select an analyzer:

- From the **Select Analyzer** window, select an analyzer from the **Analyzer** drop-down list.
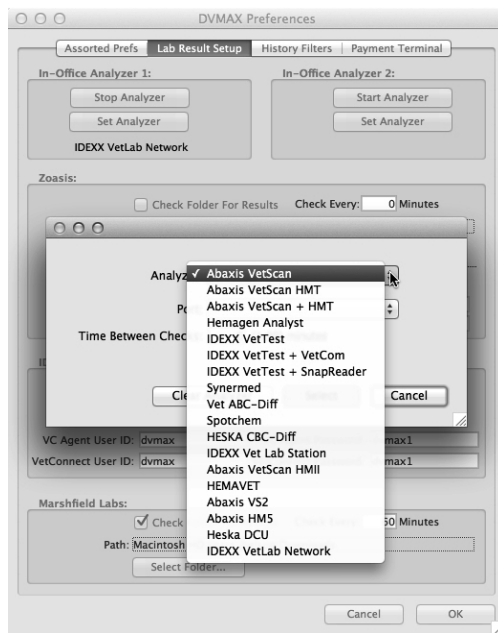
- With certain instruments, such as the Abaxis Vetscan HMT or Abaxis Vetscan + HMT, you may be asked to specify the time the interval at which the instrument should be polled for results. In the **Time Between Checks** box, type a value between 1 and 99 minutes.

Multiple Blood Analyzers for One Workstation

DVMAX allows you to have up to 2 analyzers active per workstation. If you want to use more than 2 instruments for one workstation, you could switch between analyzers by adjusting the **Select Analyzer** settings.

Where possible, the preferred alternative is to connect additional lab instruments to other workstations, making sure to configure each workstation according to the instrument(s) that are connected to it.
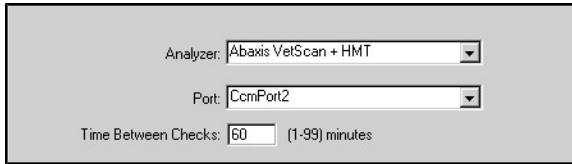
Select a Port for the In-Office Blood Analyzer

The lab results will be set up to flow from the analyzer to a workstation via a cable or other connection. The port is where the cable attached to the analyzer connects to the workstation. Most computers have multiple ports (and types of ports), often in use for connections to equipment such as printers, labelers and modems.

You will need to identify the number of the port associated with the lab instrument connection. If the wrong port is selected, lab result data cannot be sent to the workstation.

To select a port:

- Choose a port from the **Port** drop-down list.
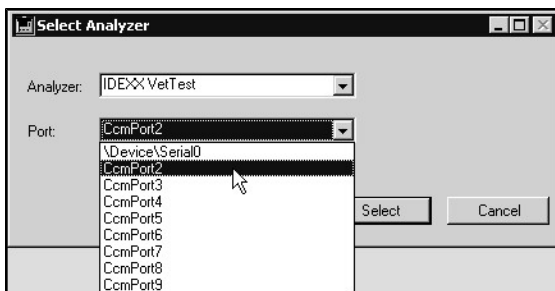
- A port will not need to be specified for devices connected via network, such as the IDEXX VetLab Station Network (where the VetLab is connected via Network as opposed to a serial connection).

Determining the Port Number for In-Office Analyzers

The **Port** drop-down list will display a number of choices for ports, but only one of those is the actual port to which the lab instrument is connected. Here are two suggestions to help you determine the port number:

- Typically, the port number will be Com2. Try this option first. Select Com2 from the drop-down menu; follow the rest of the setup instructions, then try running a test. If there is no data flow, try a different port.

-OR-

- If your workstation has USB-type ports, purchase a **Keyspan Serial Port Connection to USB Port** conversion link. This is a piece of equipment that converts a Serial Port connection (the most likely type of "plug" found at the end of the cable running from the analyzer) to a USB Port connection.

- Once this is hooked up, you can plug the instrument cable in to a USB port. The Keyspan connector has a built-in identification code (the P/N, found on the back of the connector).
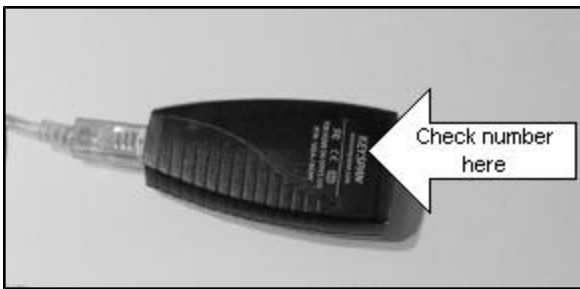
- The first few numbers of that P/N code will be listed on the drop-down menu, making it easier to identify the proper port.
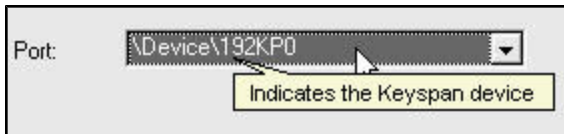
⚠️ If you are using a serial to ethernet adapter, you will need to specify an IP address. Contact DVMAX Technical Support for assistance.

ℹ️ A port will not need to be specified for devices connected via network, such as the IDEXX VetLab Station Network (where the VetLab is connected via Network as opposed to a serial connection).

Confirm the In-Office Analyzer Settings

- Click **Select** to confirm the analyzer settings and close the **Select Analyzer** dialog box.

-OR-

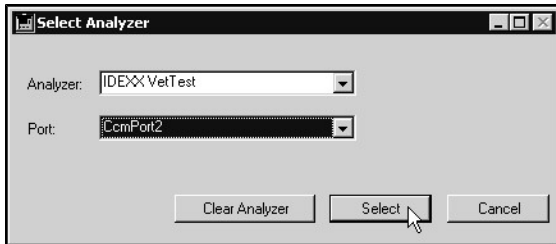- Click **Clear Analyzer** to remove the existing configuration and select a new analyzer. See **Clear Analyzer** for more details.

Start the In-Office Blood Analyzer

Once you have configured the **In-Office Analyzer**, you need to enable the function or turn it "on". To enable the flow of data from the analyzer to DVMAX:

- Click **StartAnalyzer**. Lab results from the attached analyzer(s) can now be read by DVMAX.
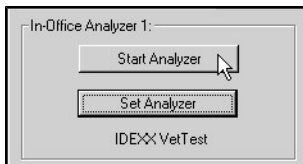
The **Start Analyzer** and **Stop Analyzer** buttons will not start or stop the actual piece of lab equipment you have connected to DVMAX. Your lab instruments may be on all the time, but DVMAX will only accept results after the **Start Analyzer** button is clicked. Note that **Stop Analyzer** is only available after **Start Analyzer** has been selected.

Stopping the Lab Results Flow for In-Office Analyzers

After **Start Analyzer** is selected, a **Stop Analyzer** button will be available. To turn off the **In-Office Analyzer** function:

- Click **Stop Analyzer**. This will disable communication between the lab equipment and the workstation.
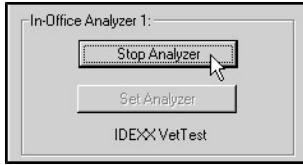
Clear the In-Office Analyzer Selection

You can clear the current analyzer setting from the **Select Analyzer** dialog box.

To clear the analyzer settings:

- From the **Select Analyzer** window, click **Clear Analyzer**. This will remove the selected instrument and port settings.
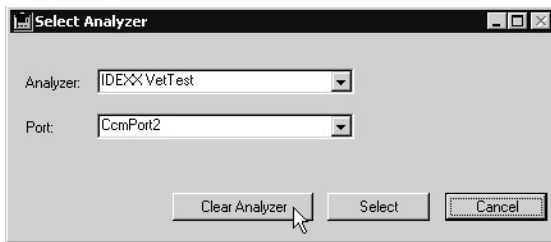
ⓘ If **Start Analyzer** has been selected, you must select **Stop Analyzer** before you can clear settings.

Receiving and Saving In-Office Analyzer Lab Results

Lab results are sent to DVMAX **Lab Log**. Before you can receive results, be sure you have done the following:

- You have properly set up the **In-Office Analyzer(s)**.
- You have clicked **Start Analyzer** on the **Lab Results Setup** tab.
- You have run (or are running) an analysis on a lab instrument connected to your workstation.

VetLab Active On Another Terminal

Only one terminal can be connected to a specific VetLab Station Network at one time. If you try to connect to the same VetLab already running on another terminal, you will see the message "VetLab is active on another terminal".

VetLab HealthCheck Alert in Command Palette

If there is a VetLab HealthCheck timeout where the connection between DVMAX and the Vet-Lab Station Network is interrupted, DVMAX will display an alert in the Command Palette. The alert will say "VetLab HealthCheck TimeOut, Check Connections". Check your connection to the VetLab Station Network.

Automatically Download Results from Antech/Zoasis

The Antech/Zoasis Lab Result function allows DVMAX to automatically read downloaded Antech lab results from a specified folder and append the results to the appropriate patient record.
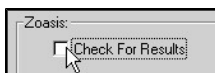
To enable the lab results reader:

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

- From **Preferences**, select the **Lab Results Setup** tab.

- In the Antech/Zoasis area, select **Check for Results** to enable the automatic checking function.

- Type a number of minutes in the **Check Every** field. This tells DVMAX to check the Antech/Zoasis Results folder at the specified interval.

- Type the path to the Antech/Zoasis results folder in the **Path** field, or click **Select Folder** and select the Zoasis results folder from the directory. DVMAX will look for downloaded Antech/Zoasis lab results in this folder and place the lab results in the appropriate patient record(s).

- If you would like the results to automatically download select the **Automatically Retrieve Results** check box.

- Enter the **Zoasis ID, Username, Zip** and **Password**

- Click **OK** from the **Preferences** tab to save your configuration.

- Quit and relaunch DVMAX.

Disable Checking for Antech/Zoasis Lab Results

To disable checking for lab results from the Zoasis folder:

- Deselect **Check for Results** from the Antech/Zoasis area of the Lab Result Setup tab under **Preferences**.


Automatically Download IDEXX Reference Lab Results

To configure DVMAX to automatically check for results and to **enable the IDEXX requisition submission features** from IDEXX Reference Lab:

- Choose **Preferences f**rom the **File** menu.
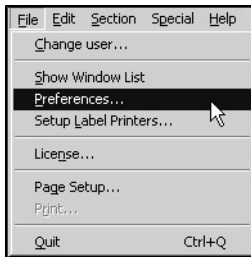
- From **Preferences**, choose the **Lab Result Setup** tab.

- **Use VC4 Lab Services** will be selected by default. **Use VC4 Lab Services** must be selected if you intend to make use of the IDEXX Lab Requisition features in DVMAX. Contact DVMAX Technical Support with questions about your IDEXX Reference Lab setup.

- Select **Check for Results** in the **IDEXX Configuration** section.

- Type a number of hours in the **Check Every _ Hours** field. The value must be a whole number. DVMAX will not accept decimals in this field.

- Configure globally: For clinics using one IDEXX account, go to **General Management** -> **Utilities** -> **Integrations Setup Wizard** -> Provider **IDEXX** to finish configuring DVMAX to automatically send requisition and receive lab results. This permits the credentials to be used by all terminals without having to enter the credentials in every terminal. See **Entering IDEXX Credentials for Lab Results and Requisitions**.

- Configure locally: If your clinic actively uses more than one IDEXX Reference Lab account, you may enter credentials on a per-terminal basis. The IDEXX credentials you enter on a terminal will only be used by that terminal. Local preferences will override any global settings for this terminal. See **Entering IDEXX Credentials for Lab Results, Requisitions and VetConnect Plus**.
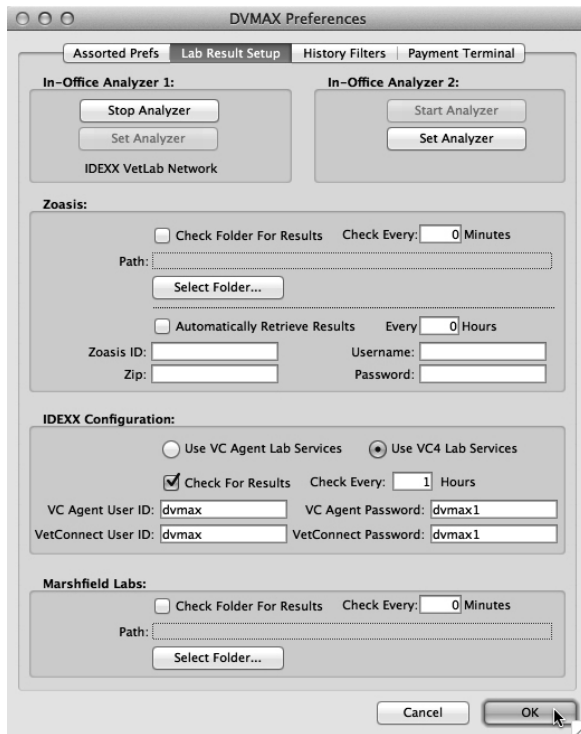
- Click **OK** to save your configuration.

- Quit and relaunch DVMAX.

⚠️ Any changes you make in IDEXX Configuration will only take effect after DVMAX has been restarted on the workstation.

ℹ️ DVMAX allows individual staff to attach their name to a requisition when **submitting IDEXX Reference Lab requisitions** or to use the generic clinic name. For staff to use their name when submitting an IDEXX Reference Lab requisition, they will need to type the staff IDEXX User ID in the **IDEXX Account** field of the staff member from **Section** -> **Patient Codes** -> **Staff**. Refer to the section in this chapter on **Setting Up Requisitions for IDEXX Reference Lab** for more details.

ℹ️ If you have any questions about your IDEXX account, your VetConnect or your Vet-Connect Plus credentials, please contact DVMAX Tech Support.

Entering IDEXX Credentials for Requisitions and Lab Results

The VC Agent and VetConnect credential fields must be completed before you can submit IDEXX Reference Lab requisitions and receive IDEXX lab results. However, there are 2 different places where you could enter those credentials: under **Preferences** -> **Lab Result Setup** -> **IDEXX** or under **General Management** -> **Integrations Setup Wizard** -> Provider **IDEXX**. This allows you to set your preferences globally or locally. Local preferences will override the global preferences.

Global preferences: For clinics using a single IDEXX account, enter your account credentials from **General Management -> Integrations Setup Wizard** -> Provider **IDEXX** and **IDEXX Web PACS** (as applicable). This permits the credentials to be used by all terminals (for sending requisitions) without having to enter the credentials on every terminal.

Local preferences: The VC Agent and VetConnect credential fields under **Preferences** -> **Lab Result Setup** should **only** be filled in if your clinic actively uses multiple IDEXX accounts. The IDEXX credentials you enter on a terminal will only be used by that terminal.

To enter credentials:

- **VC Agent User ID** - To use the same IDEXX account credentials for all terminals, enter your **VC Agent User ID** credentials under **General Management -> Utilities -> Integrations Setup Wizard** -> Provider **IDEXX**. If this terminal will use a unique IDEXX account, type the IDEXX VC Agent User ID in the **VC Agent User ID** field under **Preferences**.

- **VC Agent Password** - To use the same IDEXX account credentials for all terminals, enter your **VC Agent Password** credentials under **General Management -> Utilities -> Integrations Setup Wizard** -> Provider **IDEXX**. If this terminal will use a unique IDEXX account, type the IDEXX VC Agent Password in the **VC Agent Password** field under **Preferences**.

- **VetConnect User ID** - To use the same IDEXX account credentials for all terminals, enter your **VetConnect User ID** credentials under **General Management -> Utilities -> Integrations Setup Wizard** -> Provider **IDEXX**. If this terminal will use a unique IDEXX account, type your IDEXX VetConnect User ID in the **VetConnect User ID** field under **Preferences**.

- **VetConnect Password** - To use the same IDEXX account credentials for all terminals, enter your **VetConnect Password** credentials under **General Management -> Utilities -> Integrations Setup Wizard** -> Provider **IDEXX**. If this terminal will use a unique IDEXX account, type your IDEXX VetConnect Password in the **VetConnect Password** field under **Preferences**.

Automatically Download Marshfield Labs Results

The Marshfield Labs function allows DVMAX to automatically read downloaded Marshfield Lab results from a specified folder and append the results to the appropriate patient record.

To enable the Marshfield lab results reader:

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

- From **Preferences**, select the **Lab Results Setup** tab.

- In the **Marshfield Labs** area, select **Check for Results**.

- Type a number of minutes in the **Check Every** field. This tells DVMAX to check the Results folder at the specified interval.
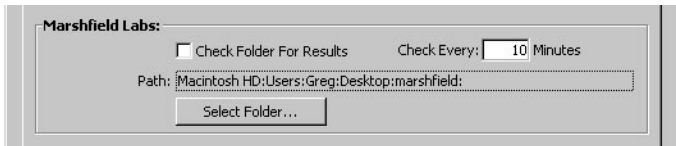
- Type the path to the Marshfield Labs results folder in the **Path** field, or click **Select Folder** and select the Marshfield Labs results folder from the directory. DVMAX will look for downloaded Marshfield Labs results in this folder and place the lab results in the appropriate patient record(s).

- Click **OK** to enable checking of Marshfield Labs lab results.

- Quit and relaunch DVMAX.

Integrations Setup Wizard

The DVMAX Integrations Setup Wizard (formerly called **Requisitions Setup Wizard**), found under **General Management** -> **Utilities**, lets you configure requisition and/or integration setup for Cubex, Antech/Zoasis, IDEXX Reference Lab, IDEXX VetLab Station Network, IDEXX Web PACS and IDEXX rVetLink. The Wizard guides you in the process of linking DVMAX Bill Item Codes to Provider Codes, so that each time a particular Bill Item Code is applied (either because it is linked to an MRE added to a patient record or because the Bill Item is added to an invoice), the associated requisition is generated. Requisition actions do not apply to rVetLink, but the linking of rVetLink provider codes to DVMAX bill item codes is still key to the functionality.

In general, to set up configure functionality by provider, you will need to:

1. Select a Provider from the **Provider** drop down list.

2. Make the provider active by selecting **This Provider Is Active**.

3. Make sure Provider Codes are downloaded from the selected provider.

4. Link Provider Codes to DVMAX Bill Codes.

5. Link DVMAX Species Codes and Breed Codes to provider Species Codes and Breed Codes, as applicable.

6. Add or build Panels (groups of Provider codes, similar to super items), as needed/applicable. The Provider **VetLab Station Network** only uses Panels in requisitions.

Editing Provider Codes

Depending on the provider, some codes should never be edited. The option to edit Provider codes is available for certain providers and should be enabled by default. Please contact DVMAX Technical Support if you have any questions concerning the ability to edit existing codes.

Setting Up Requisitions for the VetLab Station Network

The Integrations Setup Wizard lets you set up requisition functionality to submit requisitions from DVMAX to the VetLab Station Network. To use this feature, the VetLab Station must be

connected to DVMAX via network (not serial connection). See the chapter **Blood Analyzers** for further information.

To set up requisition submission for the VetLab Station Network:

- From the **Section** menu, select **General Management** -> **Utilities**.
- Choose **Integrations Setup Wizard**.
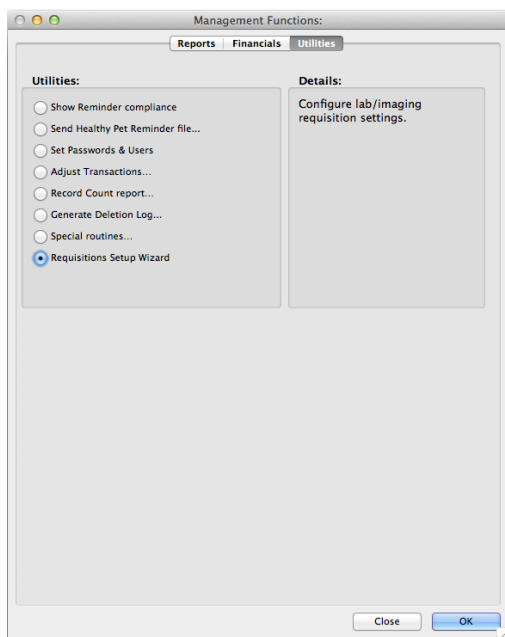
- From the **Provider** drop-down menu, choose **VetLab**.
- If you wish to make this your default requisitions provider, click **Default**. From the Confirm dialog, click **OK** to set the provider as default. The Integrations Setup Wizard will open to the VetLab panel if you set VetLab as the default provider.

Note that you can use any of the providers you have configured regardless of which provider is set as the Default. The **Integrations Setup Wizard** will default to the VetLab panel when opened if you set VetLab as the default provider.

- Select **This Provider Is Active** to make the provider, VetLab, active. If the provider is not active, you cannot use the requisition features in DVMAX for this provider.
- Select **Send Census Data to VetLab Station** to enable automatic submission of patient census data to the VetLab Station. You can select any or all of the options below to prompt DVMAX to send census data to the VetLab.
- From the Instruments list, select **Active** to identify the in-house instruments currently connected to the VetLab Station Network.

- From the **Provider Codes** tab, you can view VetLab Provider codes (assays) and assign a code to one or more instruments. You cannot add Provider codes to the list.
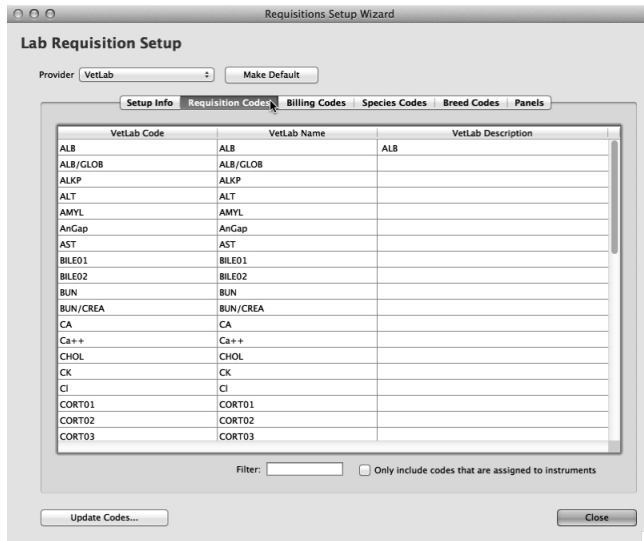
- From the **Billing Codes** tab, link DVMAX Bill Codes with Panels. A Panel is a set of one or more Provider codes. This step is mandatory in order to accurately capture charges associated with submitted requisitions. Double click a record to view and edit.

 Note that it is also possible to add or edit which Panel is linked to a Bill Item Code directly from the Bill Item record (**Section** -> **Inventory Management** -> **Bill Items**)
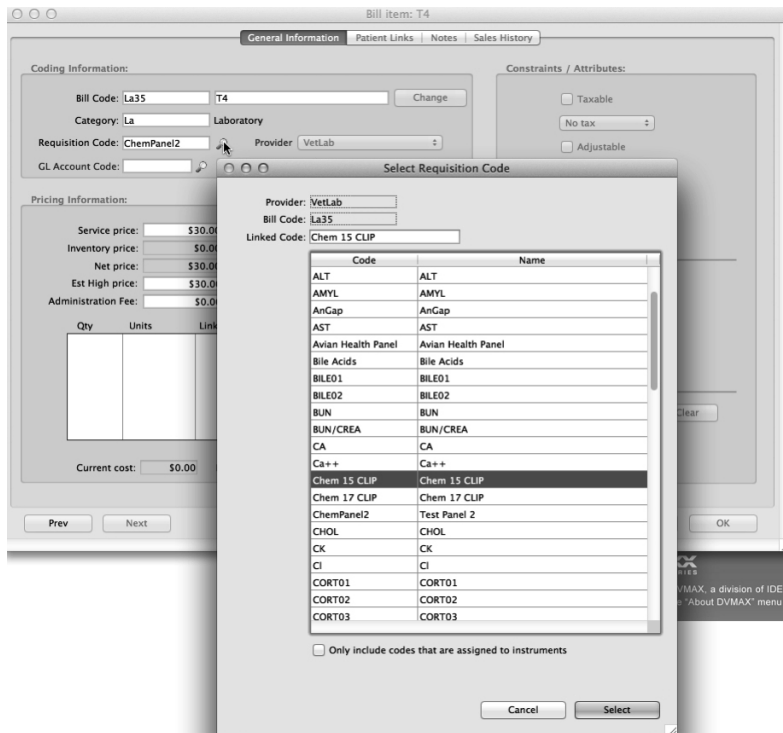
- From the **Species Codes** tab, link DVMAX Species Codes with VetLab Species Codes. Double click a record to view details and edit.

- From the VetLab Panels tab, add, edit and view Panels. A Panel is a set of one or more VetLab Provider Codes (assays). Panels are linked to Bill Codes.

Send Census Data to VetLab

You can send census data to the VetLab Station Network automatically or manually. To send patient census data automatically, first select **Send Census Data to VetLab Station** from provider **VetLab** on the **Integrations Setup Wizard**. Then, selecting one or more of the following will automatically send census data from DVMAX to the VetLab when the related action is engaged:

- **When Patient is in Hospital** – Send Census data when the patient is marked as In Hospital.

- **When patient invoice is started** – Send Census data when an invoice is **started or opened** for a specified patient. You should only select this option if neither of the other 2 options is selected.

- **When patient visit is active** – Send Census data when a patient visit is active (when a patient is marked as Checked In for an appointment. See the **Appointments** chapter for more details on the Visits feature).
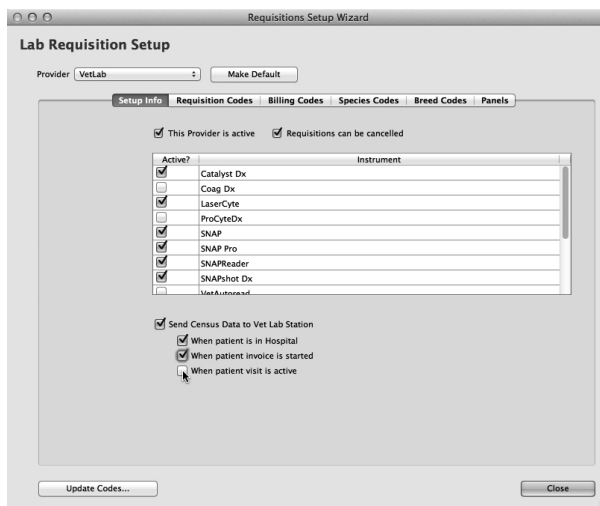

You can also manually send census data to the VetLab Station by clicking the **VetLab** button from the **Patient General Info** tab of a patient record and clicking **Add**.
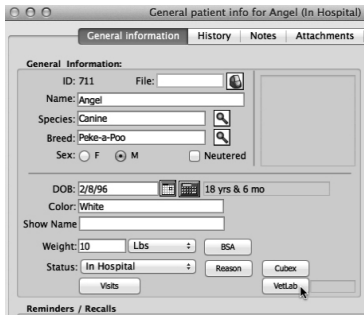
Selecting Active Instruments

The Instrument List includes all blood analyzers/lab instruments supported by DVMAX. Select the Active checkbox beside each of the instruments that are used by your clinic and currently connected to a workstation.
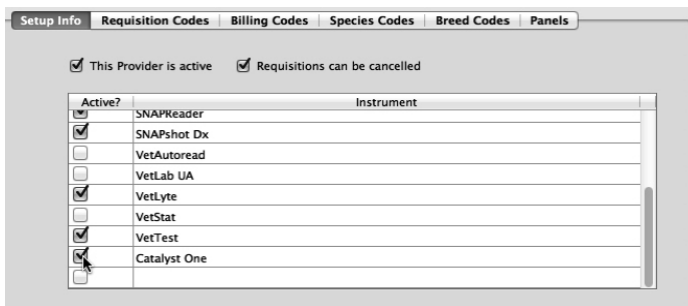
Update Codes for VetLab

From time to time, the VetLab Directory of Services may add or remove Provider codes. When you click **Update Codes**, DVMAX checks the VetLab Directory of Services for updates to Provider Codes (Assay List), provider Species Codes and Panels. To update codes:

- From the VetLab Provider dialog, click **Update Codes**.

- From the Confirm dialog, click **OK** to proceed or **Cancel** to stop the update.

- This process may take a few minutes.

⚠️ The **Update Codes** process may remove Provider codes that are already linked to Bill Items. See **Deleted Codes List After Running Update Codes** for more on managing deleted codes.
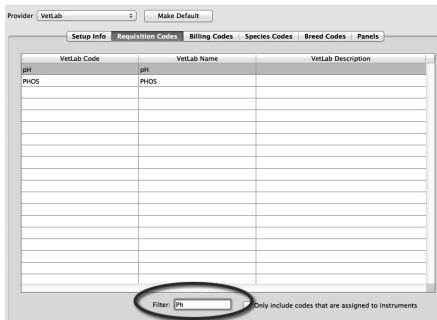
VetLab Provider Codes

The VetLab **Provider Codes** tab provides a list of Provider codes (assays). These Provider codes cannot be edited, but you can view the details of the code and assign specific lab instruments to the selected code. VetLab Provider codes are used to build VetLab Panels, which are in turn linked to DVMAX Bill Codes.

Filter the List of VetLab Provider Codes

Use the Filter field at the bottom of the Provider Codes tab to filter the list of codes. In the **Filter** field, type a full or partial code, name or description. The list will be constrained by what

you type.

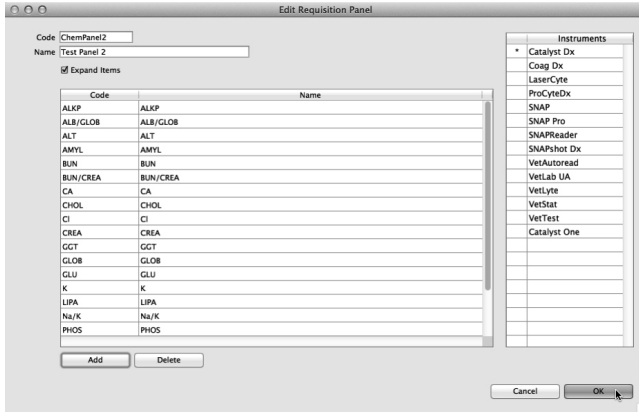## Assign Instruments to VetLab Provider Codes

You can assign VetLab Provider codes, or assays, to selected instruments. This can help you identify which in-house instrument(s) you associate with a specified assay, and assist in creating Panels. This can also help when constraining the list of VetLab Provider codes or panels. To assign instruments to a code:

- From the Provider Codes list, double click on a code.

- From the Add/Edit Provider Codes dialog, click in the column beside an instrument to select it. If there is an asterisk beside the instrument, it is selected.

- Click again to deselect.
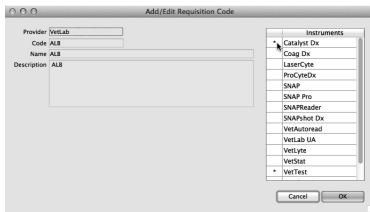
Show Only Provider Codes Assigned to Instruments

If you have assigned instruments to VetLab Provider codes, you can select **Only Include Codes That Are Assigned to Instruments** to show only those Provider codes that are associated with at least one in-house analyzer. This is helpful in constraining the list to only codes that you use with analyzers in your clinic. See **Assign Instruments to VetLab Provider Codes** for more details.

VetLab Panels

A Panel is a set of one or more Provider codes (or assays) grouped together under a Panel Code and Name. Some panels are provided by the VetLab Station, but you can create and edit your own panels. For VetLab, only Panels can be linked to Bill Codes. Individual Provider codes cannot be linked to Bill Codes. However, you can create a Panel with only one associated requisition item or assay.

Create VetLab Panels

To create or edit a VetLab Panel:

- From the **Integrations Setup Wizard**, select Provider **VetLab**.

- Choose the **Panels** tab.

- Click **Add** from the list of Panels.

- In the **Code** field, type a brief code for the Panel.

- In the **Name** field, give a descriptive name to the Panel. The Panel Name displays in the **Requisition** window when a requisition is added to a patient record.

- Select **Expand Items** if desired. By default, when a Panel is added to a requisition, only the Panel Name displays in the **Requisition** window. To display all of the assays associated with the panel in the **Requisition** window when this Panel is added to a requisition, select **Expand Items**.

- Add items to the Panel. Click **Add** to add Provider Codes, or assays, to the Panel. To remove or delete an item from the Panel, select the item and click **Delete**. See **Add Items to a VetLab Panel** for more information.

- Associate a Panel with one or more in-house lab instruments, if desired. From the Instruments List area on the right of the Edit dialog, click in the column beside an instrument to select it. If there is an asterisk beside the instrument, it is selected. Using this feature allows you to assign instruments to a Panel. See **Assign Instruments to VetLab Panels**.

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

Add Items to a VetLab Panel

A Requisition Code pick list displays when you click **Add** from the Edit Requisition Panel dialog. You can select an item from the list, or type a VetLab Provider Code or partial code in the Linked Code field to filter the list. Select **Only Include Codes That Are Assigned to Instruments** to constrain the list to codes that have been assigned to your in-house lab instruments (See **Assign Instruments to VetLab Provider Codes**). To select an item:

- Type a code in the **Linked Code** field, or click a code in the list to highlight.

- Click **Select**. The item will be added to the Panel.
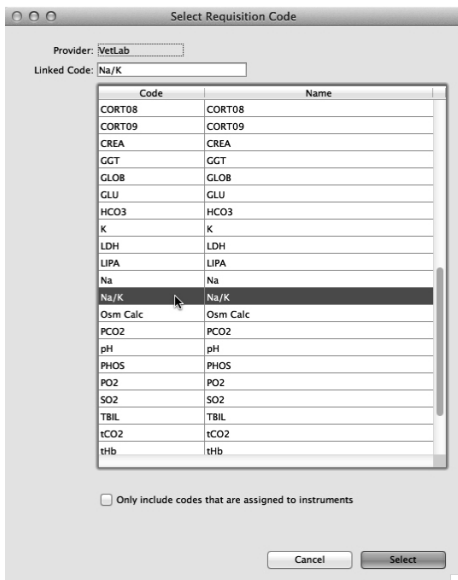
View or Edit VetLab Panels

To view or edit a VetLab Panel:

- From the **Integrations Setup Wizard**, select Provider VetLab.

- Choose the **Panels** tab.

- Use the **Filter** field to constrain the list by the value you type in the field.

- Select **Only Include Panels That Are Assigned to Instruments** to constrain the list of Panels to those assigned to one or more in-house analyzers.

- From the list of Panels, double click on a Panel to view or edit.

- From the **Edit Requisition Panel** dialog, click **Add** to add new Provider codes to the Panel, or select an item on the list and click **Delete** to remove the item from the Panel.

Delete VetLab Panels

To delete a VetLab Panel:

- From the **Integrations Setup Wizard**, select Provider VetLab.

- Choose the **Panels** tab.

- Click to select a Panel from the list.

- Click **Delete** to delete the Panel.

Duplicate or Copy a Panel

You can duplicate or copy an existing VetLab Panel using the **Duplicate** button. To duplicate a panel:

- From the list of panels, click to select/highlight a panel.

- Click **Duplicate**.

- A duplicate of the panel will be added to the Panels list with the same name as the original panel with the words "Copy of" at the beginning of the panel name. For example, if you created a duplicate of Panel "Chem 15", the duplicate would be called "Copy of Chem 15".

Filter the List of VetLab Panels

Use the **Filter** field at the bottom of the Panels tab to filter the list of panels. In the **Filter** field, type a full or partial code, name or description. The list will be constrained by what you type.

Assign Instruments to VetLab Panels

You can assign VetLab Panels to selected instruments. This can be a useful tool in remembering to use the appropriate instrument for a specified Panel and in filtering the list of Panels. To assign instruments to a Panel:

- From the Panels list, double click on a Panel.

- From the Edit Requisition Panel dialog Instruments List area, click in the column beside an instrument to select it. If there is an asterisk beside the instrument, it is selected.
- Click again to deselect.

Show Only VetLab Panels Assigned to Instruments

If you have assigned instruments to VetLab Panels, you can select **Only Include Codes That Are Assigned to Instruments** to show only those Panels that are associated with at least one in-house analyzer. This is helpful in constraining the list to only Panels that you use with analyzers in your clinic. See **Assign Instruments to VetLab Provider Codes** for more details.

DVMAX Billing Codes and VetLab

DVMAX Bill Items are linked to MRCs, so that every time an MRE is added to a patient record, the associated charge is added to the invoice. If the Bill Item is also linked to a provider code, then the charges associated with the requisition will be captured whenever the associated MRE is applied to a patient record or bill item is added to an invoice. In the case of VetLab, Bill Codes are linked to Provider Panels.

To view Bill Codes:

- From the VetLab Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.
- If you like, use the **Filter** field to constrain the list of records to those containing what you type.
- If desired, select **Top Selling Only** to view the list of top selling items.
- Double click a record to view or edit.

To add Bill Item records, go to **Section** -> **Inventory Management** -> **Bill Items**.

View Top Selling Bill Code Items Linked to VetLab Panels

You can constrain the Bill Items list by top selling bill items. To constrain the list, select **Top Selling Only**.
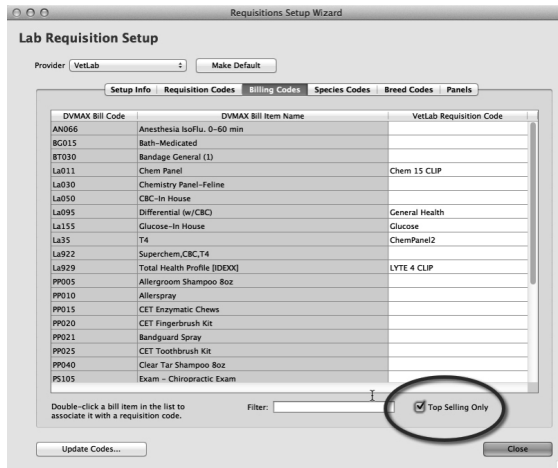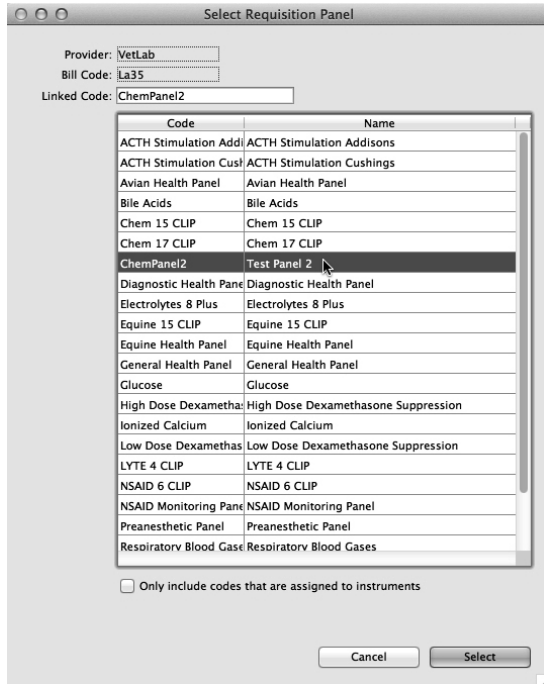
Linking DVMAX Bill Codes to VetLab Panels

A Panel must be linked to a Bill Code in order for the correct charge to be added to an invoice whenever the requisition is created, either by adding the Bill Item to an invoice directly or by adding the MRE linked to the Bill Item to a patient record. For the provider VetLab, only Panels can be linked to Bill Codes, individual Provider codes cannot. However, you can create a Panel with only one associated requisition item or assay.

To link a Bill Code to a VetLab Panel:

- From the VetLab Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling items.

- Double click a record.

- From the Select Requisition Panel dialog, choose a Panel to link to the Bill Item. Type a code in the **Linked Code** field, or click a code in the list to highlight.

- Click **Select**. The Panel will be linked to the specified Bill Code.

Linking DVMAX Species Codes to VetLab Species Codes

The species codes that DVMAX uses to identify animal species may not be the same one used by all in-house lab instruments and external lab providers. Linking the DVMAX species code to the Provider code permits more accurate requisition information to flow from DVMAX to the Provider and back.

- From the VetLab Species tab, double click a DVMAX species record you want to associate with a VetLab species code.

- If you like, use the **Filter** field to constrain the list of records to records containing what you type.

- From the Species List, click to select the VetLab species to associate with the DVMAX species record.
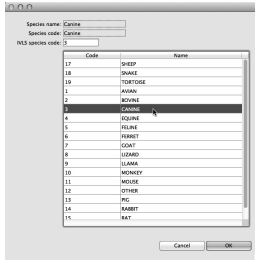
- Click **OK** to save the selection.

The DVMAX Species Code record is automatically updated when you link the DVMAX species code with the Provider code in the **Integrations Setup Wizard**.
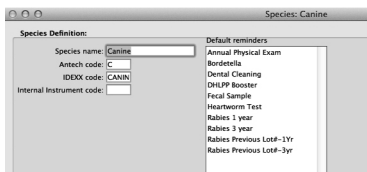
Setting Up Requisitions for IDEXX Reference Lab

The **Integrations Setup Wizard** lets you set up requisition functionality to submit requisitions from DVMAX to the IDEXX Reference Lab. To set up requisition submission for the IDEXX Reference Lab:

- From the **Section** menu, select **General Management** -> **Utilities**.

- Choose **Integrations Setup Wizard**.
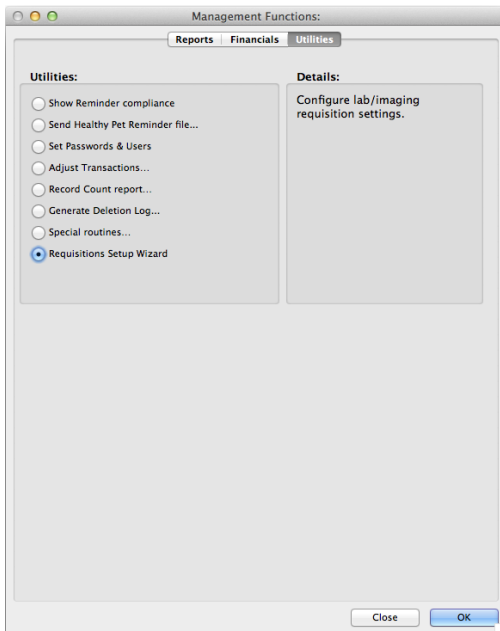
- From the **Provider** drop-down menu, choose **IDEXX**.

- If you wish to make this your default requisitions provider, click **Default**. From the Confirm dialog, click **OK** to set the provider as default. The Integrations Setup Wizard will open to the IDEXX tab if you set IDEXX as the default provider.

ⓘ Note that you can use any of the providers you have configured regardless of which provider is set as the Default. The **Integrations Setup Wizard** will default to IDEXX tab when opened if you set IDEXX as the default provider.

ⓘ DVMAX allows individual staff to use their own IDEXX credentials when submitting IDEXX Reference Lab requisitions or to use the credentials defined under the Integrations Setup Wizard.

- Select **This Provider Is Active** to make the provider, IDEXX, active. If the provider is not active, you cannot use the requisition features in DVMAX for this provider.

- Select **Requisitions Can Be Canceled** if this provider permits the Canceling of Requisitions and your clinic wishes to access this option.

- Enter your IDEXX account credentials. These credentials will be applied globally, so that all terminals can make use of the requisition features. See **Entering IDEXX Credentials for Lab Results and Requisitions**.

- Add a VCPlus LIMS Account to the IDEXX setup. For sites with more than one LIMS account, you can also set the default account. See Adding a Default LIMS

- From the **Provider Codes** tab, you can view the list of IDEXX Provider codes. You cannot add or edit Provider codes on this list.

- From the **Billing Codes** tab, link DVMAX Bill Codes with IDEXX Provider Codes. This step is mandatory in order to accurately capture charges associated with submitted requisitions. Double click a record to view and edit.

ⓘ Note that it is also possible to add or edit which Provider Code is linked to a Bill Item Code directly from the Bill Item record (**Section** -> **Inventory Management** -> **Bill Items**)

- From the **Species Codes** tab, link DVMAX Species Codes with IDEXX Species Codes. Double Click a record to view details and edit.

- From the **Breed Codes** tab, link DVMAX Breed Codes with IDEXX Breed Codes. Double Click a record to view details and edit.

- From the IDEXX **Panels** tab, add, edit and view Panels, where desired. A Panel is a set of one or more Provider Codes.

- Link Panels to Bill Items if you have Panels you intend to use.

Adding a VetConnect PLUS LIMS Account to IDEXX Setup

The Integrations Setup Wizard allows you to set a default LIMS account used for VCPlus Requisition orders. The default account will be used unless another LIMS account is selected from

the LIMS drop-down menu in the Requisitions floating window from Patient History (See **About the Requisition Window**).

Adding and Deleting a LIMS account, as well as setting the default LIMS account is done from the IDEXX panel of the **Integrations Setup Wizard**. To add a LIMS account:

- Select the **Setup Info** tab of the **Integrations Setup Wizard**.

- From the LIMS account setup area, click the **Add** button to add a LIMS account.

- The Add LIMS code dialog displays.

- Add a LIMS **Label** to identify the LIMS.

- Add the LIMS **Account** number and click **OK**.
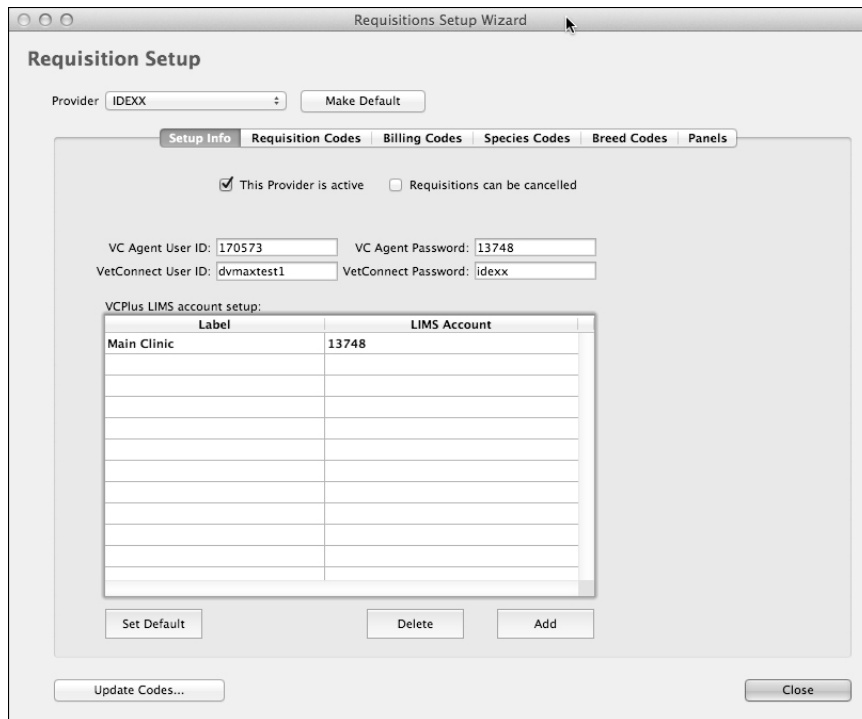
- To make a LIMS account listing the default, click within the row of the account you wish to make the default.

- Select **Set Default**. The account will then be listed as the default LIMS on the Requisition window from the Patient record when a VCPlus Requisition is ordered.

- To delete a LIMS account, click within the row of the account you wish to delete. Click **Delete**.

- Select **Close** to save changes to the Requisition Setup.

Update Codes for IDEXX

From time to time, the IDEXX Reference Lab provider may add or remove Provider codes. When you click **Update Codes**, DVMAX checks for updates to Provider Codes, provider

Species Codes, provider Breed codes.

To update codes:

- From the IDEXX Provider dialog, click **Update Codes**.
- From the Confirm dialog, click **OK** to proceed or **Cancel** to stop the update.
- This process may take a few minutes.
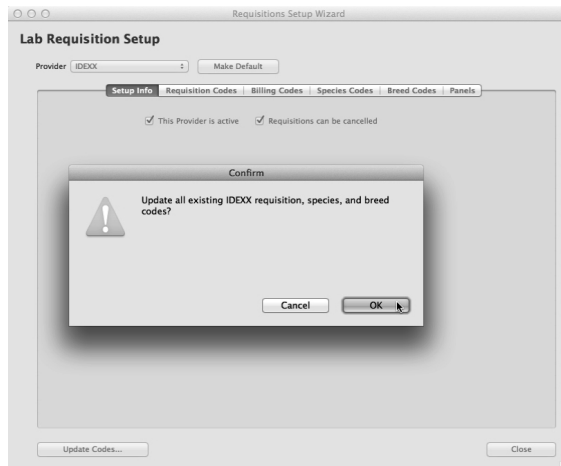
⚠️ The Update Codes process may remove Provider codes that are already linked to Bill Items. See **Deleted Codes List After Running Update Codes** for more on managing deleted codes.

IDEXX Provider Codes

The IDEXX **Provider Codes** tab provides a list of Provider codes from IDEXX. These Provider codes cannot be edited.

Filter the List of IDEXX Provider Codes

Use the **Filter** field at the bottom of the Provider Codes tab to filter the list of codes. In the **Filter** field, type a full or partial code, name or description. The list will be constrained by what you type.

DVMAX Bill Item Codes and IDEXX Reference Lab

DVMAX Bill Items are linked to MRCs, so that every time an MRE is added to a patient record, the associated charge is added to the invoice. If the Bill Item is also linked to an IDEXX Provider Code, then the charges associated with the requisition will be captured whenever the associated MRE is applied to a patient record or bill item is added to an invoice. In the case of IDEXX Reference Lab, bill codes are linked to Provider codes. You cannot add Bill Item records from the Integrations Setup Wizard. To add Bill Item records, go to **Section** -> **Inventory Management** -> **Bill Items.**

To view Bill Codes:

- From the IDEXX Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling items.

- Double click a record to view or edit.

View Top Selling Bill Code Items Linked to IDEXX Provider Codes

You can constrain the Bill Items list by top selling bill items. To constrain the list, select **Top Selling Only**.

Linking DVMAX Bill Codes to IDEXX Provider Codes

An IDEXX Reference Lab Provider Code must be linked to a Bill Code in order for the correct charge to be added to an invoice whenever the IDEXX requisition is created, either by adding the Bill Item to an invoice directly or by adding the MRE linked to the Bill Item to a patient record. For the IDEXX Reference Lab, provider Codes must be linked to Bill Codes.

To link a Bill Code to an IDEXX provider code:

- From the IDEXX Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling items.

- Double click a record.

- From the Select Requisition Code dialog, choose a Requisition Code to link to the Bill Item. Type a code in the **Linked Code** field, or click a code in the list to highlight.

- Click **Select**. The Provider Code will be linked to the specified Bill Code.

Linking DVMAX Species Codes to IDEXX Species Codes

The species codes that DVMAX uses to identify animal species may not be the same one used by all in-house lab instruments and external lab providers. Linking the DVMAX species code to the Provider code permits more accurate requisition information to flow from DVMAX to the Provider and back.

- From the IDEXX **Species** tab, double click a DVMAX species record you want to associate with an IDEXX species code.

- If you like, use the **Filter** field to constrain the list of records to records containing what you type.

- From the Species List, click to select the IDEXX species to associate with the DVMAX species record.

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

The DVMAX Species Code record is automatically updated when you link the DVMAX species code with the Provider code in the Integrations Setup Wizard.

Linking DVMAX Breed Codes to IDEXX Breed Codes

The breed codes that DVMAX uses to identify animal breeds may not be the same one used by all external lab providers. Linking the DVMAX breed code to the Provider code permits more accurate requisition information to flow from DVMAX to the Provider and back.

- From the IDEXX **Breed** tab, double click a DVMAX breed record you want to associate with the IDEXX breed code.

- If you like, use the **Filter** field to constrain the list of records to records containing what you type.

- From the Breeds List, click to select the IDEXX breed to associate with the DVMAX breed record.

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

The DVMAX Breed Code record is automatically updated when you link the DVMAX breed code with the Provider code in the Integrations Setup Wizard.

Add and Edit IDEXX Requisition Panels

A panel is a set of one or more Provider codes grouped together under a Panel Code and Name. Some providers have pre-defined panels, but you can create and edit your own panels.

To create or edit an IDEXX Panel:

- From the **Integrations Setup Wizard**, select Provider IDEXX.

- Choose the **Panels** tab.

- Click **Add** from the list of Panels.

- In the **Code** field, type a brief code for the Panel.

- In the **Name** field, give a descriptive name to the Panel.

- Select **Expand Items** to display all of the requisition items in the panel when this is added to a requisition, otherwise, only the Panel Code will display in the requisition window.

- Click **Add** to add Provider Codes to the Panel. To remove or delete an item from the Panel, select the item and click **Delete**.

- Click **OK** to save the Panel. The Panel Code will be added to the list of Provider codes.
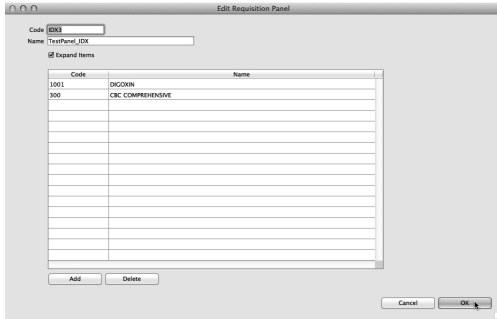
- Once you have created the Panel, you must link the Panel Code to a Bill item. See **Linking DVMAX Bill Codes to Provider Codes** for more information.

Linking DVMAX Bill Codes to IDEXX Requisition Panels

A Panel must be linked to a Bill Code in order for the correct charge to be added to an invoice whenever the requisition is created, either by adding the Bill Item to an invoice directly or by adding the MRE linked to the Bill Item to a patient record. For the provider IDEXX, both individual Provider codes as well as Panels must be linked to Bill Codes.

Once you have created a Panel (see **View and Edit IDEXX Requisition Panels**), you link the IDEXX Panel Code to a Bill Item in the same way as you link any other Requisition Code to a DVMAX bill item.

To link a Bill Code to an IDEXX Panel:

- From the IDEXX Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling items.

- Double click the Bill Item record you want to link to a Panel. A Select Requisition Code pick list will display.

- From the Select Requisition Code pick list, choose the Panel to link to the Bill Item. Type the Panel code in the **Linked Code** field, or click the Panel code from the list to highlight.

- Click **Select**. The Panel code will be linked to the specified Bill Code.

Cubex and DVMAX Integration

The **Integrations Setup Wizard** lets you set up functionality to submit requisitions from DVMAX to your Cubex Cabinet. DVMAX Technical Support should assist you with DVMAX/Cubex integration. Once Cubex integration is configured, you need to start the Cubex monitor. See **Enabling the Cubex Monitor in DVMAX**.

⚠️ It is very important that Cubex be involved prior to the setup of DVMAX/Cubex integration, as they should clear and turn off the Cabinet's queuing of orders until AFTER the configuration is done. Failure to do will result in DVMAX collecting OLD ordered information and populating it onto invoices!

Setting Up Requisitions for Cubex

To set up requisition submission for Cubex:

- From the **Section** menu, select **General Management** -> **Utilities**.
- Choose **Integrations Setup Wizard**.
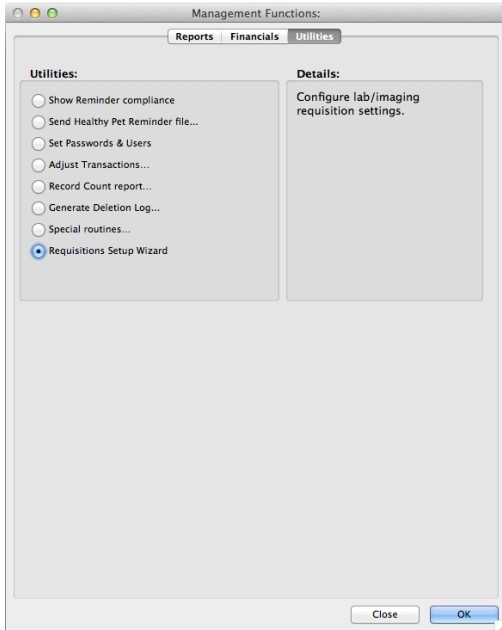
- From the **Provider** drop-down menu, choose **Cubex**.
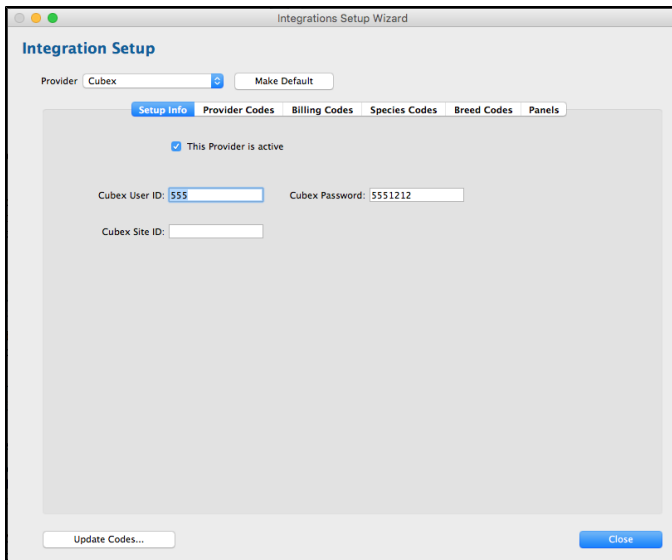
- If you wish to make this your default provider, click **Default**. From the Confirm dialog, click **OK** to set the provider as default. The **Integrations Setup Wizard** will open to the Cubex tab if you set Cubex as the default provider.

ⓘ Note that you can use any of the providers you have configured regardless of which provider is set as the Default. The **Integrations Setup Wizard** will default to the Cubex tab when opened if you set Cubex as the default provider.

- Select **This Provider Is Active** to make the provider, Cubex, active. If the provider is not active, you cannot use the integration features in DVMAX for this provider.

- Enter your Cubex account credentials, including **User ID**, **Password** and **Site ID**. These credentials will be applied globally, so that all terminals can make use of the integration features.

- From the **Provider Codes** tab, you can view the list of Cubex Provider codes.

- From the **Billing Codes** tab, link DVMAX Bill Codes with Cubex Provider Codes. This step is mandatory in order to accurately capture charges associated with submitted requisitions, where applicable. Double click a record to view and edit.

- Cubex does not use the **Species Codes** or **Breed Codes** tabs. An Alert will be shown when you click the **Species Codes** or **Breed Codes** tabs.

- Cubex integration setup does not use the **Panels** tab. An Alert will be shown when you click the **Panels** tab.

Update Codes for Cubex

From time to time, the Cubex provider may add or remove Provider codes. When you click **Update Codes**, DVMAX checks for updates to Provider Codes.

To update codes:

- From the Cubex Provider dialog, click **Update Codes**.

- From the Confirm dialog, click **OK** to proceed or **Cancel** to stop the update.

- This process may take a few minutes.

⚠ The Update Codes process may remove Provider codes that are already linked to Bill Items. See **Deleted Codes List After Running Update Codes** for more on managing deleted codes.

Cubex Provider Codes

The **Cubex Provider Codes** tab provides a list of Provider codes from Cubex. These Provider codes cannot be edited.

Filter the List of Cubex Provider Codes

Use the **Filter** field at the bottom of the **Provider Codes** tab to filter the list of codes. In the **Filter** field, type a full or partial code, name or description. The list will be constrained by what you type.

DVMAX Bill Item Codes and Cubex

DVMAX Bill Items are linked to MRCs, so that every time an MRE is added to a patient record, the associated charge is added to the invoice. If the Bill Item is also linked to a Cubex Provider Code, then the charges associated with the requisition will be captured whenever the associated MRE is applied to a patient record or bill item is added to an invoice. In the case of Cubex, bill codes are linked to Provider codes. You cannot add Bill Item records from the Integrations Setup Wizard. To add Bill Item records, go to **Section** -> **Inventory Management** -> **Bill Items.**

To view Bill Codes:

- From the Cubex Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling bill items.

- Double click a record to view or edit.

View Top Selling Bill Code Items Linked to Cubex Provider Codes

You can constrain the Bill Items list by top selling bill items. To constrain the list, select **Top Selling Only**.

Linking DVMAX Bill Codes to Cubex Provider Codes

A Cubex Provider Code must be linked to a Bill Code in order for the correct charge to be added to an invoice whenever the Cubex requisition is created, either by adding the Bill Item to an invoice directly or by adding the MRE linked to the Bill Item to a patient record. For the provider Cubex, Provider Codes must be linked to Bill Codes.

To link a Bill Code to a Cubex provider code:

- From the Cubex Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling items.

- Double click a record.

- From the Select Requisition Code dialog, choose a Provider Code to link to the Bill Item. Type a code in the **Linked Code** field, or click a code in the list to highlight.

- Click **Select**. The Provider Code will be linked to the specified Bill Code.

Enabling the Cubex Monitor in DVMAX

Once you have used the Integrations Wizard to configure DVMAX to work with Cubex, you will need to turn on the Cubex Monitor to allow DVMAX to send and receive information from the Cubex cabinet.
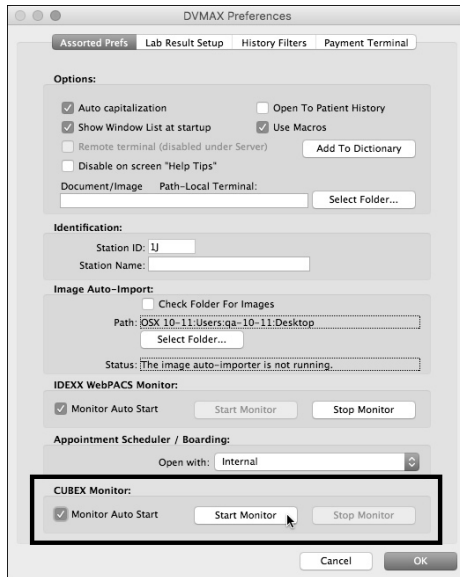
To start the Cubex Monitor:

- From the **File** menu on the DVMAX main screen, choose **Preferences**.

- From the Assorted Prefs tab of the Preferences dialog, go to the Cubex Monitor section.

- To automatically start the monitor when DVMAX is running, choose **Monitor Auto Start**.

- To manually start the monitor, click **Start Monitor**.

- To stop the monitor, click **Stop Monitor**.

Setting Up Requisitions for IDEXX Web PACS Integration

The **Integrations Setup Wizard** lets you set up functionality to submit requisitions from DVMAX to IDEXX Web PACS. After setting up Web PACS integration, you will need to ensure the Web PACS monitor is running. See **Enabling the IDEXX Web PACS Monitor in DVMAX**.

To set up requisition submission for IDEXX Web PACS:

- From the **Section** menu, select **General Management** -> **Utilities**.

- Choose **Integrations Setup Wizard**.

- From the **Provider** drop-down menu, choose **IDEXX Web PACS**.

- If you wish to make this your default requisitions provider, click **Default**. From the Confirm dialog, click **OK** to set the provider as default. The **Integrations**

> **Setup Wizard** will open to the IDEXX Web PACS tab if you set IDEXX Web PACS as the default provider.

ℹ️ Note that you can use any of the providers you have configured regardless of which provider is set as the Default. The **Integrations Setup Wizard** will default to the IDEXX Web PACS tab when opened if you set IDEXX Web PACS as the default provider.

- Select **This Provider Is Active** to make the provider, IDEXX Web PACS, active. If the provider is not active, you cannot use the integration features in DVMAX for this provider.
- Select **Requisitions Can Be Canceled** if this provider permits the Canceling of Requisitions and your clinic wishes to access this option.
- Enter your IDEXX account credentials. These credentials will be applied globally, so that all terminals can make use of the requisition feature.
- Your SAP ID is entered automatically by DVMAX and is not editable from the **Integrations Setup Wizard**.
- From the **Provider Codes** tab, you can view the list of IDEXX Web PACS Provider codes. You cannot add or edit Provider codes on this list.
- From the **Billing Codes** tab, link DVMAX Bill Codes with IDEXX Web PACS Provider Codes. This step is mandatory in order to accurately capture charges associated with submitted requisitions. Double click a record to view and edit.

ℹ️ Note that it is also possible to add or edit which Provider Code is linked to a Bill Item Code directly from the Bill Item record (**Section** -> **Inventory Management** -> **Bill Items**)

- The **Species Codes** and **Breed Codes** tab are not used under IDEXX Web PACS. An Alert will be shown when you click the **Species Codes** or **Breed Codes** tabs.
- The **Panels** tab is not used under IDEXX Web PACS. An Alert will be shown when you click the **Panels** tab.

Update Codes for IDEXX Web PACS

From time to time, the IDEXX Web PACS provider may add or remove Provider codes. When you click **Update Codes**, DVMAX checks for updates to Provider Codes.

To update codes:

- From the IDEXX Provider dialog, click **Update Codes**.
- From the Confirm dialog, click **OK** to proceed or **Cancel** to stop the update.
- This process may take a few minutes.

⚠ The Update Codes process may remove Provider codes that are already linked to Bill Items. See **Deleted Codes List After Running Update Codes** for more on managing deleted codes.

IDEXX Web PACS Provider Codes

The IDEXX Web PACS **Provider Codes** tab provides a list of Provider codes from IDEXX Web PACS. These Provider codes cannot be edited.

Filter the List of IDEXX Provider Codes

Use the **Filter** field at the bottom of the Provider Codes tab to filter the list of codes. In the **Filter** field, type a full or partial code, name or description. The list will be constrained by what you type.

DVMAX Bill Item Codes and IDEXX Web PACS

DVMAX Bill Items are linked to MRCs, so that every time an MRE is added to a patient record, the associated charge is added to the invoice. If the Bill Item is also linked to an IDEXX Web PACS Provider Code, then the charges associated with the requisition will be captured whenever the associated MRE is applied to a patient record or bill item is added to an invoice. In the case of IDEXX Web PACS, bill codes are linked to Provider codes. You cannot add Bill Item records from the Integrations Setup Wizard. To add Bill Item records, go to **Section** -> **Inventory Management** -> **Bill Items.**

To view Bill Codes:

- From the **IDEXX Web PACS** Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling items.

- Double click a record to view or edit.

View Top Selling Bill Code Items Linked to IDEXX Web PACS Provider Codes

You can constrain the Bill Items list by top selling bill items. To constrain the list, select **Top Selling Only**.

Linking DVMAX Bill Codes to IDEXX Web PACS Provider Codes

An IDEXX Web PACS Provider Code must be linked to a Bill Code in order for the correct charge to be added to an invoice whenever the IDEXX Web PACS requisition is created, either by adding the Bill Item to an invoice directly or by adding the MRE linked to the Bill Item to a patient record. To link a Bill Code to an IDEXX Web PACS provider code:

- From the IDEXX Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.
- If you like, use the **Filter** field to constrain the list of records to those containing what you type.
- If desired, select **Top Selling Only** to view the list of top selling Bill Items.
- Double click a record.
- From the Select Requisition Code dialog, choose a Provider Code to link to the Bill Item. Type a code in the **Linked Code** field, or click a code in the list to highlight.
- Click **Select**. The Provider Code will be linked to the specified Bill Code.

Enabling the IDEXX Web PACS Monitor in DVMAX

Once you have used the Integrations Wizard to configure DVMAX to work with IDEXX Web PACS, you will need to turn on the Web PACS Monitor to allow DVMAX to send and receive information from Web PACS.

To start the Web PACS Monitor:

- From the File menu on the DVMAX main screen, choose Preferences.
- From the Assorted Prefs tab of the Preferences dialog, go to the Web PACS Monitor section.
- To automatically start the monitor when DVMAX is running, choose **Monitor Auto Start**.
- To manually start the monitor, click **Start Monitor**.
- To stop the monitor, click **Stop Monitor**.

Setting Up Requisitions for Antech/Zoasis

The **Integrations Setup Wizard** lets you set up requisition functionality to create and print requisitions from DVMAX to send to Antech/Zoasis. Multiple accounts can be specified during

setup. To set up requisition submission for Antech/Zoasis:

- From the **Section** menu, select **General Management** -> **Utilities**.
- Choose **Integrations Setup Wizard**.

- From the **Provider** drop-down menu, choose **Antech/Zoasis**.
- If you wish to make this your default lab requisitons provider, click **Default**. From the Confirm dialog, click **OK** to set the provider as default. The Integrations Setup Wizard will open to the Antech/Zoasis tab if you set Antech/Zoasis as the default provider.

ⓘ Note that you can use any of the providers you have configured regardless of which provider is set as the Default. The **Integrations Setup Wizard** will default to Antech/Zoasis tab when opened if you set Antech/Zoasis as the default provider.

- Select **This Provider Is Active** to make the provider, Antech/Zoasis, active. If the provider is not active, you cannot use the integrations features in DVMAX for this provider.

- The **Requisitions Can Be Canceled** option is not available for Antech/Zoasis.

- Click **Add** below the Antech/Zoasis Account List area to add your account credentials. Multiple accounts can be added. The Antech/Zoasis Code dialog opens.

- In the **Antech Code** field, type your Antech account number. This information is needed to allow you to use DVMAX to generate Antech/Zoasis requisitions.

- In the **Zoasis ID** field, type your Zoasis ID. This information is needed to allow you to use DVMAX to generate Antech/Zoasis requisitions.

- To add another Antech/Zoasis account, click **Add** again and enter the next set of account credentials.

- From the **Provider Codes** tab, you can view the list of Antech/Zoasis Provider codes. You cannot add or edit Provider codes on this list.

- From the **Billing Codes** tab, link DVMAX Bill Codes with Antech/Zoasis Provider Code. This step is mandatory in order to accurately capture charges associated with submitted requisitions. Double click a record to view and edit.

ⓘ Note that it is also possible to add or edit which Provider Code is linked to a Bill Item Code directly from the Bill Item record (**Section** -> **Inventory Management** -> **Bill Items**)

- From the **Species Codes** tab, link DVMAX Species Codes with Antech/Zoasis Species Codes. Double Click a record to view details and edit.

- From the **Breed Codes** tab, link DVMAX Breed Codes with Antech/Zoasis Breed Codes. Double Click a record to view details and edit.

- From the Antech/Zoasis Panels tab, add, edit and view Panels. A Panel is a set of one or more Provider Codes.

Update Codes for Antech/Zoasis

From time to time, the provider may add or remove Provider codes. When you click **Update Codes**, DVMAX checks for updates to Provider Codes, provider Species Codes, provider Breed codes.

To update codes:

- From the Antech/Zoasis Provider dialog, click **Update Codes**.
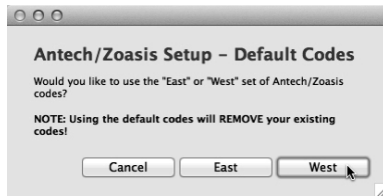
- From the Confirm dialog, click **East** or **West** to proceed, or click **Cancel** to stop the update.

- This process may take a few minutes.

⚠ The **Update Codes** process may remove Provider codes that are already linked to Bill Items. See **Deleted Codes List After Running Update Codes** for more on managing deleted codes.

Antech/Zoasis Provider Codes

The Antech/Zoasis Provider Codes tab provides a list of Provider codes from Antech/Zoasis. These Provider codes cannot be edited.

Filter the List of Antech/Zoasis Provider Codes

Use the Filter field at the bottom of the Provider Codes tab to filter the list of codes. In the **Filter** field, type a full or partial code, name or description. The list will be constrained by what you type.

DVMAX Bill Item Codes and Antech/Zoasis

DVMAX Bill Items are linked to MRCs, so that every time an MRE is added to a patient record, the associated charge is added to the invoice. If the Bill Item is also linked to an Antech/Zoasis Provider Code, then the charges associated with the requisition will be captured whenever the associated MRE is applied to a patient record or bill item is added to an invoice. In the case of Antech/Zoasis, bill codes are linked to Provider codes.

Note, you cannot add Bill Item records from the Integrations Setup Wizard. To add Bill Item records, go to **Section** -> **Inventory Management** -> **Bill Items.**

To view Bill Codes:

- From the Antech/Zoasis Provider under the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling items.

- Double click a record to view or edit.

View Top Selling Bill Code Items Linked to Antech/Zoasis Panels

You can constrain the Bill Items list by top selling bill items. To constrain the list, select **Top Selling Only**.

Linking Bill Codes to Antech/Zoasis Provider Codes

A Provider Code must be linked to a Bill Code in order for the correct charge to be added to an invoice whenever the Antech/Zoasis requisition is created, either by adding the Bill Item to an invoice directly or by adding the MRE linked to the Bill Item to a patient record. For the provider Antech/Zoasis, Provider Codes must be linked to Bill Codes.

To link a Bill Code to an Antech/Zoasis Panel:

- From the Antech/Zoasis Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling items.

- Double click a record to select it and open the Provider Code pick list.

- From the Select Requisition Code pick list, choose a Provider Code to link to the Bill Item. Type a code in the **Linked Code** field, or click a code in the list to highlight.

- Click **Select**. The Provider Code will be linked to the specified Bill Code.

Linking DVMAX Species Codes to Antech/Zoasis Species Codes

The species codes that DVMAX uses to identify animal species may not be the same one used by all in-house lab instruments and external lab providers. Linking the DVMAX species code to the Provider code permits more accurate requisition information to flow from DVMAX to the Provider and back.

- From the Antech/Zoasis **Species** tab, double click a DVMAX species record you want to associate with an Antech/Zoasis species code.

- If you like, use the **Filter** field to constrain the list of records to records containing what you type.

- From the Species List, click to select the Antech/Zoasis species to associate with the DVMAX species record.

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

The DVMAX Species Code record is automatically updated when you link the DVMAX species code with the Provider code in the Integrations Setup Wizard.

Linking DVMAX Breed Codes to Antech/Zoasis Breed Codes

The breed codes that DVMAX uses to identify animal breeds may not be the same one used by all external lab providers. Linking the DVMAX breed code to the Provider code permits more accurate requisition information to flow from DVMAX to the Provider and back.

- From the Antech/Zoasis **Breed** tab, double click a DVMAX breed record you want to associate with the Antech/Zoasis breed code.

- If you like, use the **Filter** field to constrain the list of records to records containing what you type.

- From the Breeds List, click to select the Antech/Zoasis breed to associate with the DVMAX breed record.

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

The DVMAX Breed Code record is automatically updated when you link the DVMAX breed code with the Provider code in the Integrations Setup Wizard.

View and Edit Antech/Zoasis Panels

A panel is a set of one or more Provider codes grouped together under a Panel Code and Name. Some providers have pre-defined panels, but you can create and edit your own panels. Like Provider Codes, Panel Codes must be linked to Bill Item Codes.

To create or edit an Antech/Zoasis Panel:

- From the **Integrations Setup Wizard**, select Provider Antech/Zoasis.

- Choose the **Panels** tab.

- Click **Add** from the list of Panels.

- In the **Code** field, type a brief code for the Panel.

- In the **Name** field, give a descriptive name to the Panel.

- Select **Expand Items** to display all of the requisition items in the panel when this is added to a requisition, select **Expand Items**.

- Click **Add** to add Provider Codes to the Panel. To remove or delete an item from the Panel, select the item and click **Delete**.

- Click **OK** to save the Panel. Once you have created the Panel, you must link the Panel Code to a Bill item. See **Linking DVMAX Bill Codes to Antech/Zoasis Provider Codes** for more information.

Linking DVMAX Bill Codes to Antech/Zoasis Panels

A Panel must be linked to a Bill Code in order for the correct charge to be added to an invoice whenever the requisition is created, either by adding the Bill Item to an invoice directly or by adding the MRE linked to the Bill Item to a patient record. For the provider Antech/Zoasis, both individual Provider codes as well as Panels must be linked to Bill Codes.

Once you have created a Panel (see **View and Edit** Antech/Zoasis **Panels**), you link the Antech/Zoasis Panel Code to a Bill Item in the same way as you link any other Provider Code to a DVMAX bill item.

To link a Bill Code to an Antech/Zoasis Panel:

- From the Antech/Zoasis Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling items.

- Double click the Bill Item record you want to link to a Panel. A Select Provider Code pick list will display.

- From the Select Provider Code pick list, choose the Panel to link to the Bill Item. Type the Panel code in the **Linked Code** field, or click the Panel code from the list to highlight.

- Click **Select**. The Panel code will be linked to the specified Bill Code.

Setting Up rVetLink Integration

You can use the **Integrations Setup Wizard** to integrate rVetLink functionality with DVMAX. This process identifies which DVMAX events and records can be shared with referring clinics via the rVetLink portal in the same way as the rVetLink bridge application, without having to manipulate settings in the bridge application. The integration setup is very similar to configuring DVMAX for lab requisitions (except of course no requisition is created for rVetLink). For more information on working with rVetLink in DVMAX, refer to the chapter **rVetlink and DVMAX**.

⚠️ Access to the rVetLink Setup area of the Integrations Wizard is controlled by an advanced setting and you will need to work with an rVetLink on-boarding specialist to configure your rVetLink integration. The following setup overview will help you understand the information you will need to gather so you are ready to work with the on-boarding specialist.

To configure rVetLink and DVMAX integration:

- From the **Section** menu, select **General Management** -> **Utilities**.

- Choose **Integrations Setup Wizard**.
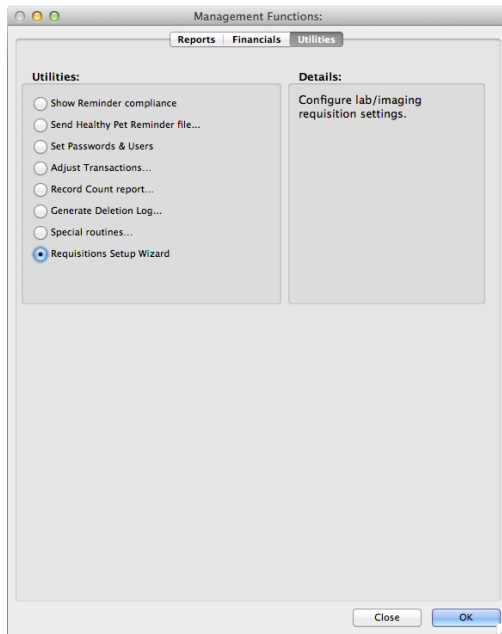
- From the **Provider** drop-down menu, choose **rVetLink**. Note that access to the rVetLink Setup area of the Integrations Wizard is controlled by an advanced setting, so you may not see this option listed. However, you will need to work with

an rVetLink on-boarding specialist to configure your rVetLink integration. The following setup overview will help you understand the information you will need to gather so you are ready to work with the on-boarding specialist.

- If you wish to make this your default provider, click **Default**. From the Confirm dialog, click **OK** to set the provider as default. The Integrations Setup Wizard will open to the rVetLink tab if you set rVetLink as the default provider.

ℹ️ Note that you can use any of the providers you have configured regardless of which provider is set as the Default. The **Integrations Setup Wizard** will default to rVetLink tab when opened if you set rVetLink as the default provider.

- Select **This Provider Is Active** to make the provider, rVetLink, active. If the provider is not active, you cannot use the integrations features in DVMAX for this provider.

- Where available, identify the rVetLink portal sections you will want to use from the rVetLink Portal Sections area. Sections that are selected will be identified with a checkmark in the appropriate box. These sections will determine what sections (and related content) are visible in the rVetLink Portal between your practice and any referring clinics.

⚠️ Access to the rVetLink Setup area of the Integrations Wizard is controlled by an advanced setting and you will need to work with an rVetLink on-boarding specialist to fully configure your rVetLink integration. The following setup overview will help you understand the information you will need to gather so you are ready to work with the on-boarding specialist.

⚠️ Whatever sections you want to make visible to referring veterinarians via the rVetLink Portal will need to be selected under the rVetLink Portal Sections area. For example, if you want to make MREs you create in DVMAX available to the rVetLink Portal, you must select Med Rec Entries from the Section list. If you do not select Med Rec Entries, DVMAX will not send MREs to the Portal, regardless of any other steps you take under setup. Note that in the case of MREs, DVMAX allows you to further identify which specific MREs you choose to share.

- In the **RVL Practice ID** field, type your Practice ID. Contact DVMAX Technical Support for assistance.

- In the **RVL Zip Password** type your rVetLink Zip Password. Contact DVMAX Technical Support for assistance.

- In the **RVL Hostname** field, add your unique rVetLink hostname. Contact DVMAX Technical Support for assistance.

- Add your rVetLink FTP username in the **RVL ftp username** field. Contact DVMAX Technical Support for assistance.

- Identify the correct path to attachments in the **RVL Path to Attachments** field. Contact DVMAX Technical Support for assistance.

- From the **Provider Codes** tab, you can view the list of rVetLink Provider codes. You cannot add or edit Provider codes on this list.

- From the **Billing Codes** tab, link DVMAX Bill Codes with rVetLink Provider codes. This step links DVMAX Medical Record Codes (via their associated Bill Code) with the categories defined by rVetLink. DVMAX codes linked to an rVetLink code can be shared with referring clinics when an MRE with the linked Bill Item code is added to a patient's history. Double click a Bill Item Code to view and edit/link to rVetLink.

- The **Species Codes** and **Breed Codes** tab are not used under rVetLink. An Alert will be shown when you click the **Species Codes** or **Breed Codes** tabs.

- The **Panels** tab is not used under rVetLink. An Alert will be shown when you click the **Panels** tab.

Update Codes for rVetLink

From time to time, the provider may add or remove Provider codes. When you click **Update Codes**, DVMAX checks for updates to Provider Codes.

To update codes:

- From the rVetLink Provider dialog, click **Update Codes**.

- This process may take a few minutes.

⚠ The **Update Codes** process may remove Provider codes that are already linked to Bill Items. See **Deleted Codes List After Running Update Codes** for more on managing deleted codes.

rVetLink Provider Codes

The rVetLink Provider Codes tab provides a list of Provider codes from rVetLink. These Provider codes cannot be edited.

DVMAX Bill Item Codes and rVetLink

The Integrations Wizard allows you to link Bill Items to Provider Codes. It is this link that determines whether an MRE activity can be shared with referring clinics via the rVetLink Portal. This is because Bill Items are already linked to MRCs.

⚠ When creating a Medical Record Entry from Patient History, if **Hide on Web** is selected, the MRE will **not** show under rVetLink even if the Bill Item/MRC is linked to the rVetLink Provider Code.

⚠ Access to the rVetLink Setup area of the Integrations Wizard is controlled by an advanced setting and you will need to work with an rVetLink on-boarding specialist to configure your rVetLink integration. The following setup overview will help you understand the information you will need to gather so you are ready to work with the on-boarding specialist.

Note, you cannot add Bill Item records from the Integrations Setup Wizard. To add Bill Item records, go to **Section** -> **Inventory Management** -> **Bill Items.**

To view Bill Codes in the Integrations Wizard:

- From the rVetLink Provider under the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling bill items.

- Double click a record to view or link to a Provider Code.

Linking Bill Codes to rVetLink Provider Codes

A Provider Code must be linked to a Bill Code in order for rVetLink to know which MREs to share with referring clinics in the Portal. Bill Items are already linked to MRCs. When an MRE associated with a particular Bill Code (and linked Provider Code) is added to a patient record, that detail can be visible in the Portal.

⚠ When creating a Medical Record Entry from Patient History, if **Hide on Web** is selected, the MRE will **not** show under rVetLink even if the associated Bill Item is linked to the rVetLink Provider Code.

To link a Bill Code to an rVetLink Provider Code:

- From the rVetLink Provider section of the **Integrations Setup Wizard**, select the **Billing Codes** tab.

- If you like, use the **Filter** field to constrain the list of records to those containing what you type.

- If desired, select **Top Selling Only** to view the list of top selling Bill Items.

- Double click a record to select it and open the Provider Code pick list.

- From the Select Requisition Code pick list, choose a Provider Code to link to the Bill Item. Type a code in the **Linked Code** field, or click a code in the list to highlight.

- Click **Select**. The Provider Code will be linked to the specified Bill Code.

Deleted Codes List After Running Update Codes

When you click **Update Codes**, you update the list of all existing Provider codes, species codes and breed codes for the selected Provider. Any older Provider codes that are no longer used will be removed from the list. DVMAX will provide you with a list of deleted Provider codes and modified or deleted requisition panels, where applicable. Typically, the list of items will be very small, if any.
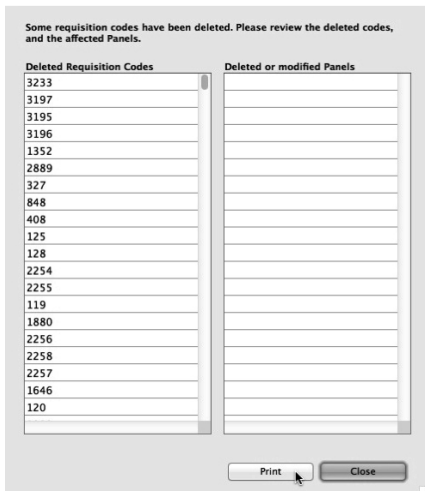
⚠ The deleted codes may leave some of the links between Bill Codes and Provider Codes incomplete, so you will want to review the list of codes. To print a list of the deleted codes, click **Print** on the Deleted Codes dialog.

If a Provider code that was linked to a bill item is deleted, the next time you apply that bill item (either by adding an MRE linked to the bill item to Patient History or by adding the bill item to an invoice), you may see an alert indicating this. You will need to review the bill code and linked Provider code from the **Billing Codes** tab in the **Integrations Setup Wizard**.
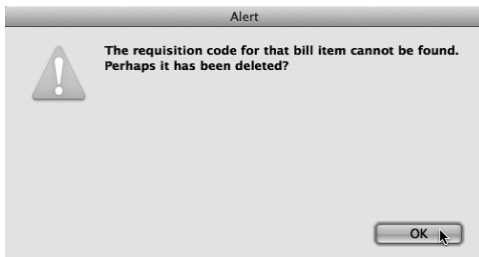
Creating and Submitting a Requisition

Once you have configured your requisition provider(s) from the **Integrations Setup Wizard** and enabled automatic receiving of lab results, creating a requisition is as easy as adding a MRE to a patient record or bill item to an invoice. After a requisition is created, you have to submit the requisition. You can then view requisition status and results from either the patient record or via the **Labs** functionality.

This information is not applicable to rVetLink, which does not create requisitions.

Create a Lab Requisition

A new requisition is created when you add an MRE with an associated Bill Item Code and linked Provider code to a patient record, or when you add a Bill Item with a linked Provider code to an invoice. A requisition record is created for the associated test and a small Requisitions dialog displays, much like what you see with invisible invoicing. You can add multiple tests or

items to the same requisition, and requisitions for more than one provider will display in their own Provider tab on the Requisitions window.

To create a new requisition:

- Open a patient record to the **History** tab.

- Click **New MRE**.

- The Add New Medical Record Entry dialog opens. Type the code MRE in the **Code** field and enter any Notes in the **Notes** section. When an MRE associated with a Bill Item and linked Provider code is added to the patient record, the Requisition will be added to the invoice as soon as the MRE is saved.

- Click **OK** or **OK and Next MRE**.
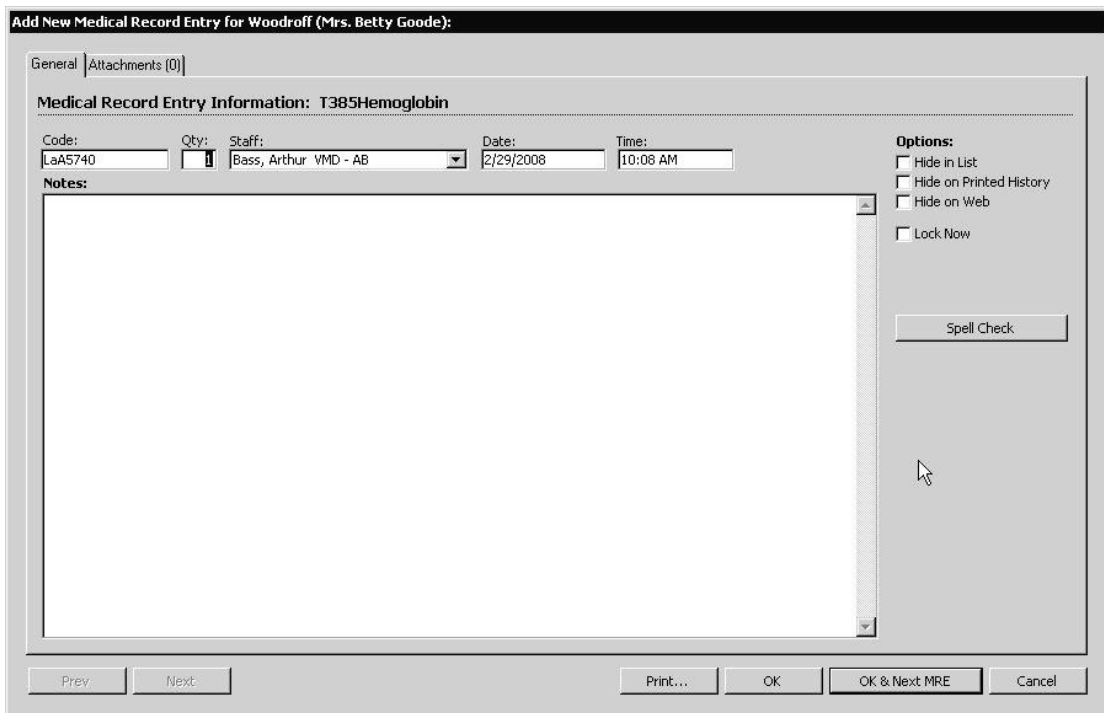
- The Requisitions window opens with the requisition or panel displayed.
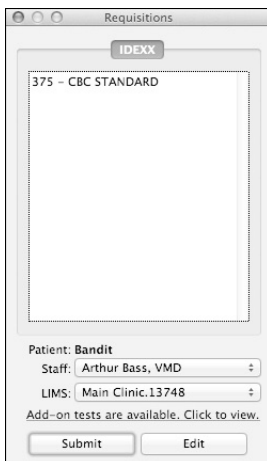
- Add any additional MREs to the patient record. Those MREs linked via Bill Item to a Provider code or panel will add more requisition items to the Requisition dialog.

- Select a requisition staff, if desired. For VetLab, the name in the requisition staff defaults to the primary provider on the **Patient General Info** tab. For IDEXX, the staff defaults to blank and the default IDEXX credentials are applied. See **Use Staff IDEXX Account** for more on assigning a staff name to an IDEXX requisition.

- Select a LIMS account, where applicable. For IDEXX, the default LIMS account is listed automatically. See **Adding a Default LIMS Account to IDEXX Requisitions**.

- Select any add-on tests to the requisition, where applicable. Click the **Add-on test are available. Click to view**. An IDEXX Add-on window will display listing all the possible add-ons. Select the add-on(s) and click the **Select** button to add the items to the requisition.

- Click **Submit** from the Requisitions window to submit the requisition. If there are multiple providers in your lab requisition window, click each provider tab and click **Submit**.

- If you are submitting a requisition to IDEXX Reference Lab, an IDEXX Lab panel will appear. This panel will allow you to make edits to and add additional tests to the requisition. Once complete, click the **Order** button to finalize the submission.

- For IDEXX lab requisitions, a requisition form will be generated. This form can be viewed as a PDF before being printed. This option is determined by your setup. Contact DVMAX Technical Support for more information.

ℹ️ A requisition is created as soon as the line item is added to the invoice or the MRE is saved to the patient record. Deleting or editing the line item will not remove the associated requisition, though the charges associated with the deleted requisition will be removed.

Creating a Staff Lab Discount Link to a Client Record

The **Client Staff Record** setting allows DVMAX to identify if a Client is able to receive Lab requisition discounts. The setting creates a link to a current Staff record and adds the Client name to that Staff record. Only Clients with this Staff link will be able to receive discounts on requisition billing.

To add a Client to a Staff Record:

- Open the **Client** record.
- Click the **Finances** tab.
- Within the **Other information** box of the **Finances** tab, click the **Staff Client Record** box. Once the box is clicked you will be able to select the associated Staff member and create the Client/Staff link.
- Select **OK**.
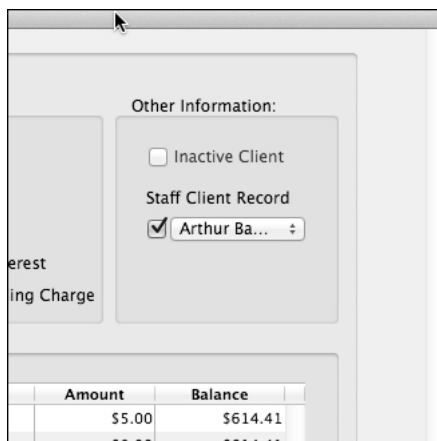
Viewing Staff Client Records

To view the list of Clients linked to a Staff record:

- From the **Section** menu, select **Patient Codes**.
- From the **Find** dialog, select **Staff** from the **Search for** menu.
- Input the **Staff Code** or select **All Records** to see a list of all Staff records.
- Select the appropriate Staff record. The Staff record displays.

- From the Staff record you can view Staff details, including Staff Client records. All Client records linked to this Staff record will be listed and will automatically be able to receive discounts on requisition billing.

ⓘ Note: You cannot add a Client directly in the Staff record. The link must be made from the Client record.

Provider or Requisition Code Not Found

From time to time, you may try creating a requisition and see the alert "The Provider code for that bill item cannot be found. Perhaps it has been deleted?" You will need to confirm that the Bill Item Code is still properly linked to a valid Provider code under the Integration Setup Wizard. The Provider Code or Panel Code could have been affected if the provider has removed or edited the Provider code and the Update Codes routine has been run. Refer to the appropriate Provider **Update Codes** section of this **Integrations, Requisitons and Lab Results** chapter for more information.
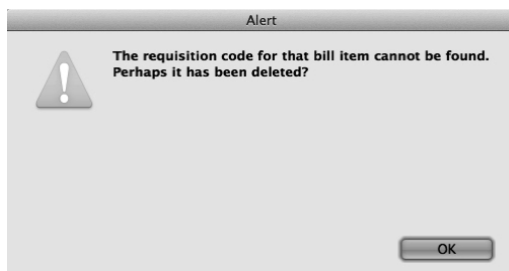
About the Lab Requisitions Window

The Requisitions window lists requisitions by provider. Below the requisitions list area, there is the patient name, the Requisition **Staff** drop down and the **Submit/Print** and **Edit** buttons.
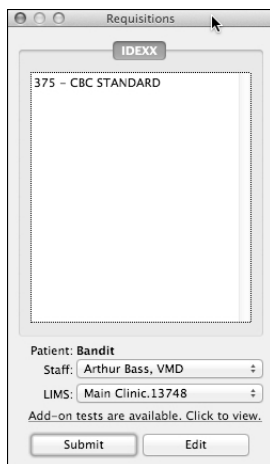
Requisitions Window Provider Tabs

If the requisitions list is for only one provider, there will be only one tab at the top of the dialog. If you add requisitions for more than one provider, the Requisition dialog will have a unique tab for each provider. You can click the Provider tab to view the requisition(s) for that provider.

Lab Requisitions Window Requisition List

Requisition items or panels display in the format Provider Code – Name. If you add a Panel, you will only see the Panel code and name, unless you selected **Expand Items** when you were building the Panel record from the Integrations Setup Wizard. When you have **Expand Items** selected under Panel setup, the individual items that make up the Panel will display.

Requisition Window Submit and Print Buttons

Depending on the provider, the Requisitions floating window will either display **Submit** and **Edit** buttons or **Print** and **Edit** buttons. For IDEXX Reference Lab and VetLab Station Network providers, you will see **Submit** and **Edit** buttons, where the Submit button allows you to electronically submit a requisition to the provider.

For IDEXX Reference Lab, you will print the requisition form once the requisition is finalized. For Antech/Zoasis, you will see **Print** and **Edit** buttons. You will print the Antech/Zoasis requisition form and submit it along with your samples to the provider. DVMAX does not submit the requisition to the provider electronically. For IDEXX Web PACS and Cubex, there is no Print requirement, so the Print option is not presented.

Adding Notes to a Requisition

To Add Notes to a Requisition:

- In the Requisitions window, click **Edit**.

- From the Edit Requisition dialog, type your notes in the Notes area. These notes will be included with both an electronic and printed requisition.

- Click **Save**.

Submit a Requisition

You can submit a requisition from the **Requisitions** window or from the Requisition area of the **Labs** facility.

To submit a requisition from the Requisition window:

- From the Requisition window, click **Submit** or **Print** (depending on the provider for whom the requisition was created).

- For Antech/Zoasis, clicking **Print** will produce a PDF requisition form that you will send in to the lab with the samples.

- For IDEXX Reference Lab, clicking **Submit** will submit an electronic requisition to the provider and create a printed requisition that is sent to the lab with the samples.

- For IDEXX Reference lab, clicking **Submit** will pop-up an additional information panel that allows for requisition edits and add-ons. Once complete, click the **Order** button to finalize the submission.

- For Cubex, clicking **Submit** will send the request to the Cubex cabinet.

- For IDEXX Web PACS, clicking **Submit** will send an electronic requisition to the provider.

ⓘ If the IDEXX auto-finalize special setting is turned "off", clicking **Submit** for IDEXX Reference Lab requisitions will produce a Draft requisition PDF. See **Finalize a Lab Requisition** for more information. This setting is "off" by default.
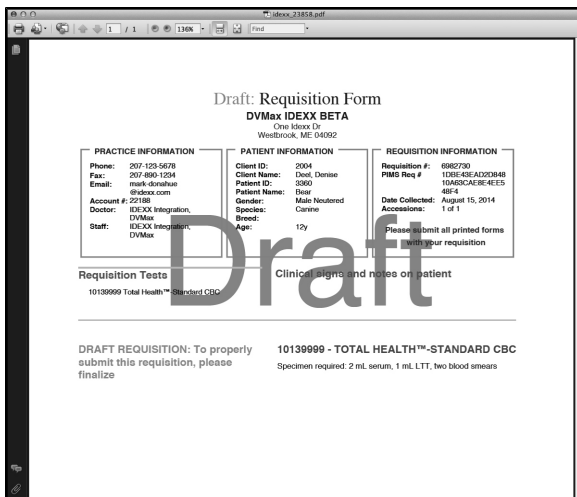
- If you are submitting a requisition to IDEXX Reference lab and additional information is required by IDEXX, an IDEXX LabREXX panel will display in an internal browser window in DVMAX before the requisition form is generated.

You will need to provide the additional details to IDEXX about the sample(s) being submitted, then close the LabREXX window.
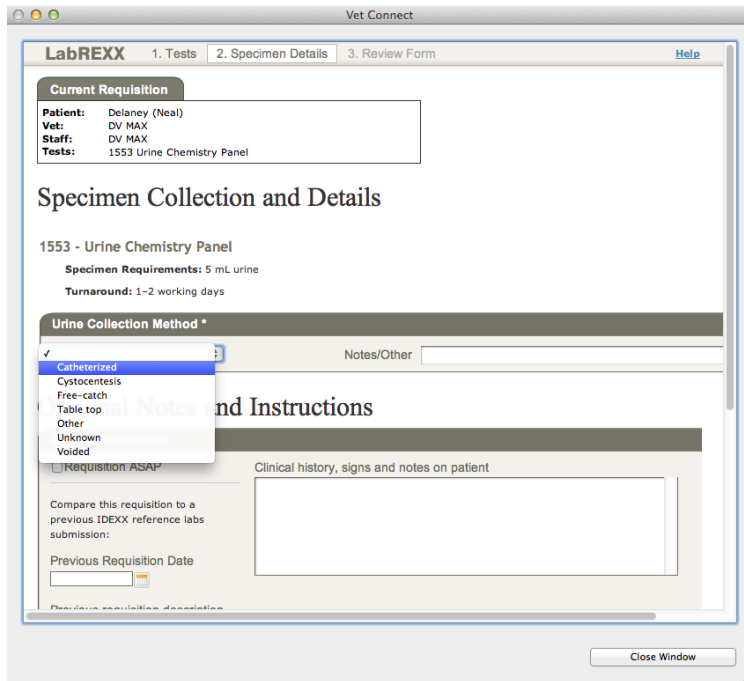
- For VetLab, clicking **Submit** will send the requisition to the VetLab Station Network.

To submit a requisition from the **Requisition** area of the **Labs** facility:

- Click the **Labs** icon on the command palette to open the Labs facility.

- Select **Requisitions** from the **Types** drop-down menu.

- On the Requisitions list, double click the lab requisition you wish to submit.

- From the Edit Requisition dialog, click **Submit**/**Print**.

- For Antech/Zoasis, clicking **Print** will produce a PDF requisition form that you will send in to the lab with the samples.

- For IDEXX Reference Lab, clicking **Submit** will submit an electronic requisition to the provider and create a printed requisition that is sent to the lab with the samples. The requisition may need to be finalized, depending on your setup. See **Finalize a Lab Requisition** for more information.

- If you are submitting a requisition to IDEXX Reference lab and additional information is required by IDEXX, an IDEXX LabREXX panel will display in an internal browser window in DVMAX before the requisition form is generated. You will need to provide the additional details to IDEXX about the sample(s) being submitted, then close the LabREXX window.
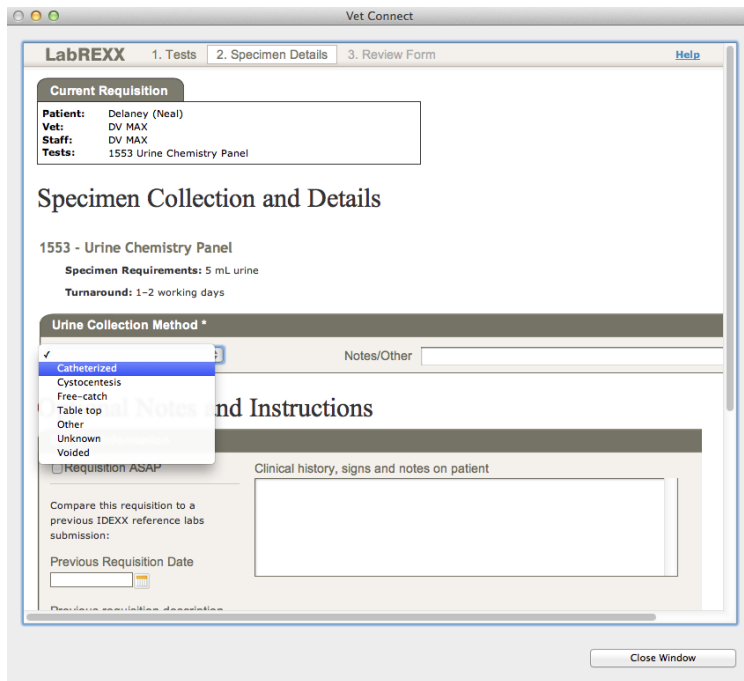
- For VetLab, clicking **Submit** will send the requisition to the VetLab Station Network.

- For IDEXX Web PACS, clicking **Submit** will send an electronic requisition to the provider.

Edit a Requisition

DVMAX lets you add or remove tests from a requisition. The options available will vary depending on the provider for whom the requisition was created and the status of the requisition.

Edit and Add a Test to an IDEXX Reference Lab Requisition

The DVMAX-VetConnect PLUS workflow has been updated and enhanced to give you even greater control over your requisitions. Once a requisition has been submitted, DVMAX gives you the ability to edit the requisition and select add-ons. The requisition order can be opened, reviewed and edited by selecting the test from the patient history and making changes on the associated IDEXX Diagnostics dialog.

To edit or select add-ons to a submitted requisition:

- Select the **Lab Results** icon from the Palette.

- Double click the requisition from the Lab Results list that would like to edit.

- Click the **Edit Requisition** button from the Edit Requisitions window.

- The IDEXX Diagnostic dialog opens displaying the original requisition order.
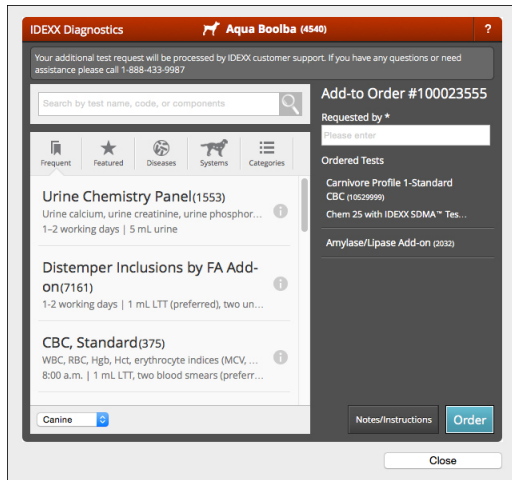
- Make the edits and complete add-ons as desired and select **Order** to resubmit the order.

Delete One or More Tests from a Requisition

Depending on the provider, you can delete one or more tests from a requisition or delete the full requisition. If the requisition is open (not yet submitted), you can always delete an item from the requisition. If a requisition has been submitted, what you can delete depends on the provider.

To delete an item from a requisition:

- From the Requisition window, click **Edit**.
- From the Edit Requisition dialog, select the item you want to delete.
- Click **Delete**.
- Click **OK** from the Confirm dialog to delete the requisition item.
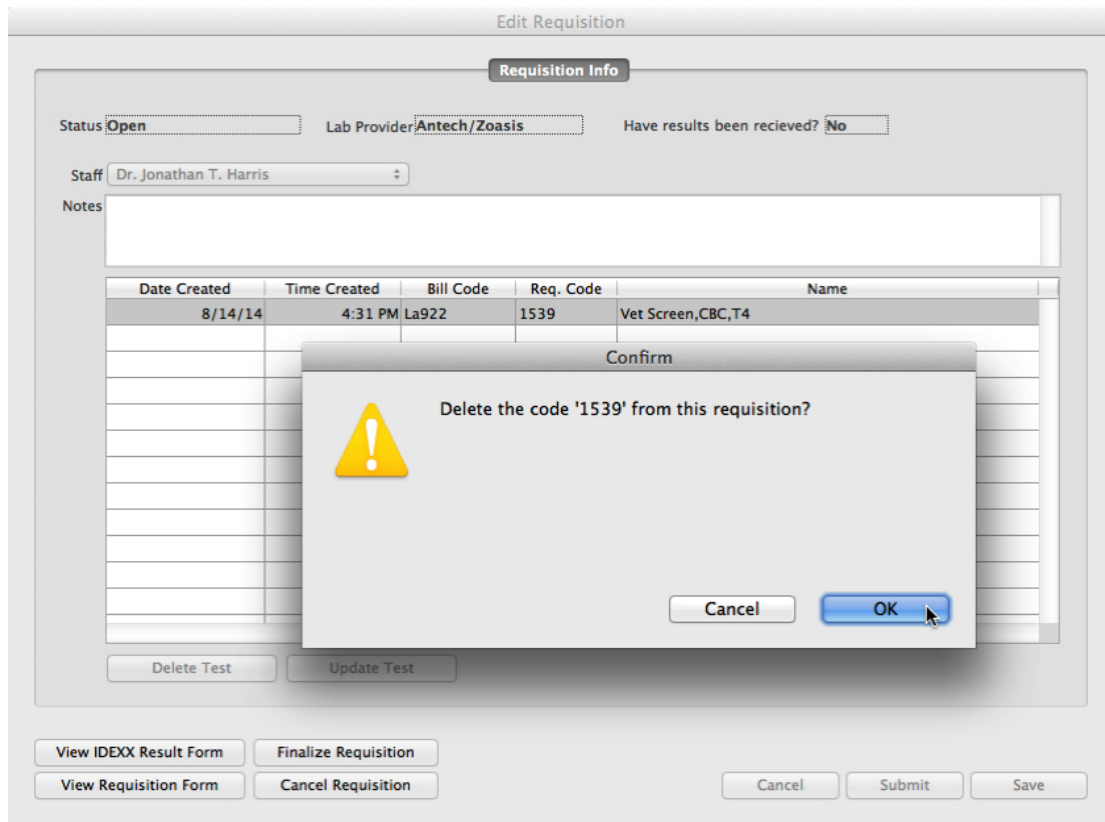
-OR-

- Click the **Labs** icon on the command palette to open the Labs facility.

- Select **Requisitions** from the **Types** drop-down menu.

- On the Requisitions list, double click the requisition you wish to change.

- From the Edit Requisition dialog, select the item you want to delete.

- Click **Delete**.

- Click **OK** from the Confirm dialog to delete the requisition item.

 VetConnect PLUS orders cannot be edited 28 days past creation.

Delete a Requisition Record

You can delete one or more items from a requisition or delete the full requisition. Deleting a requisition record is NOT the same as canceling the requisition. See **Cancel a Lab Requisition** for information on canceling a requisition. If the requisition has already been submitted, deleting the requisition record will only remove the record from requisition history, it will not affect any changes to results received.

To delete a requisition:

- From the **History** tab of a patient record, click **View Requisition History**.

- From the **Requisition History** dialog, click to highlight the requisition you wish to delete.

- Click **Delete**.

- From the Confirm dialog, click **OK** to continue and delete the record.

Add an Item to a Requisition

Depending on the provider, you can add an item to an open (unsubmitted) requisition. IDEXX Reference Lab requisitions can can edited anytime up to 28 days through VetConnect PLUS. See the **Editand Add a Test to an IDEXX Reference Lab Requisition section for details.**

To add an item to a requisition:

- If the Requisition window is still displayed from the **History** tab of a patient record, you should be able to add another requisition item or panel to the requisition.

- To add a requisition item or panel, follow the steps under **Create a Requisition**. The new requisition item will be added to the requisition. If you have created requisitions for multiple providers, the requisition item will be added to the requisition for the appropriate provider.

Update Test on a VetLab Requisition

There is an **Update Test** button on the **Edit Requisition** dialog. This button is only available when working with VetLab requisitions. The Update Test feature lets you resend or resubmit one or more items on a VetLab requisition without having to recreate a requisition.

To use **Update Test**:

- From the Edit Requisition dialog, select the requisition item(s) you want to resubmit to the VetLab Station Network.

- Click **Update Test**. A request will be resent to the VetLab Station to run the selected tests. You will see the request(s) in the **Pending** tab of the VetLab Station.

Cancel a Submitted Requisition

Depending on the status of the requisition and the provider for whom the requisition was created, you may be able to cancel a submitted requisition. There is a **Cancel Requisition** button on the **Edit Requisition** dialog. This button is enabled **only for IDEXX Reference Lab requisitions** where the status is **Submitted** or **Draft**. Clicking **Cancel Requisition** from the Edit Requisition dialog will change the status of the requisition to **Cancelled**. A requisition cannot be cancelled until it has been submitted.

IDEXX Reference Lab – Submitted lab requisitions can be canceled from DVMAX for an IDEXX Reference lab request as long as the status is not **Accessioned** or **Completed**. When the requisition status is Submitted or Draft (submitted but not finalized), a requisition can be canceled.

IDEXX Web PACS – Submitted requisitions can be canceled. Note that some requisition status changes may affect whether the requisition can be successfully canceled.

VetLab Network – To cancel a submitted VetLab requisition, you must remove the request from the VetLab Station **Pending** list. You cannot cancel a VetLab requisition from DVMAX.

Antech/Zoasis – Submitting a requisition involves printing the PDF requisition form and sending the requisition form together with sample(s) to the provider. There is no way to cancel a requisition of this type via DVMAX. Contact the provider. Note that canceling a requisition is not the same as deleting a requisition record. See **Delete a Lab Requisition Record**.

Cubex – Submitted requisitions cannot be edited or canceled from DVMAX.

To **Cancel** a Requisition using the **Cancel Requisition** button:

- From a patient record, click the **Edit** button on the **Requisitions** window to open the **Edit Requisition** dialog.
- Click **Cancel Requisition**. If the **Cancel Requisition** button is not available, it is because you cannot perform that operation for the selected requisition. Only IDEXX Reference Lab requisitions with status Submitted or Draft can be cancelled using the **Cancel Requisitions** button.
- From the **Confirm** dialog, click **OK** to cancel the requisition.

    -OR-

- From the **Labs** functionality, select **Type** -> **Requisitions**, then double click to select the requisition you want to cancel. This opens the **Edit Requisition** dialog.
- Click **Cancel Requisition**. If the **Cancel Requisition** button is not available, it is because you cannot perform that operation for the selected requisition. Only

IDEXX Reference Lab requisitions with status **Submitted** or **Draft** can be cancelled using the **Cancel Requisitions** button.

- From the **Confirm** dialog, click **OK** to cancel the requisition.

Cancelling a Requisition and Invoicing

⚠️ It is very important to recognize that cancelling a requisition does not remove the associated bill item from an invoice, nor does it remove the requisition record from patient History. Please check your records and manually remove an item from the invoice if the client is not to be billed for the canceled requisition.

Finalize an IDEXX Reference Lab Requisition

When an IDEXX Reference Lab requisition is submitted, it can either be auto-finalized (default behavior) or the requisition can be held as a draft until you select **Finalize** on the requisition record. With auto-finalize "on", when you click **Submit** on an IDEXX requisition, a PDF requisition is created to submit with your samples, and that requisition is also electronically sent to IDEXX. You may still be able to edit or cancel the requisition, as long as you do so before the samples you send in are processed. Once the requisition status is **Accessioned** or **Completed** no further editing can be done to the requisition.

With auto-finalize turned "off", DMVAX creates a **Draft** requisition. This draft can be edited, or you can choose to cancel the requisition at any time while it is in draft.
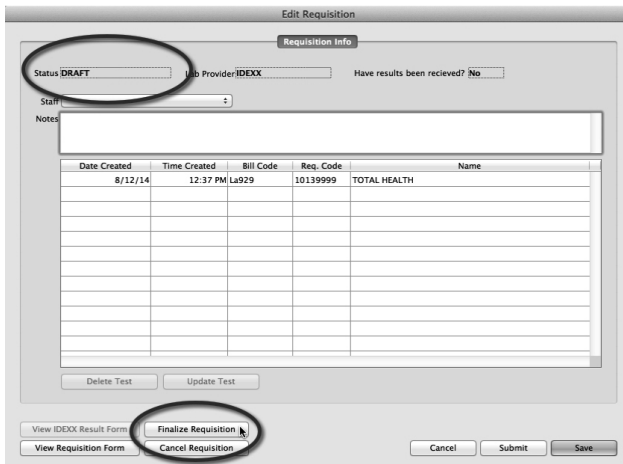
To Finalize an IDEXX Draft Requisition:

- From a patient record, click the **Edit** button on the **Requisitions** window to open the **Edit Requisition** dialog.

- Click **Finalize Requisition**. If the **Finalize Requisition** button is not available, it is because you cannot perform that operation for the selected requisition. Only IDEXX Reference Lab requisitions with status Draft can be finalized using the **Finalize Requisitions** button.

- The requisition status will change from **Draft** to **Submitted** and a PDF requisition form will be generated.

-OR-

- From the **Labs** functionality, select **Type** -> **Requisitions**, then double click to select the requisition you want to cancel. This opens the **Edit Requisition** dialog.

- Click **Finalize Requisition**. If the **Finalize Requisition** button is not available, it is because you cannot perform that operation for the selected requisition. Only IDEXX Reference Lab requisitions with status Draft can be finalized using the **Finalize Requisitions** button.

- The requisition status will change from **Draft** to **Submitted** and a PDF requisition form will be generated.

 Contact DVMAX Technical Support if you have questions or want to make changes to the IDEXX Reference Lab auto-finalize special setting.

Printing a Requisition Form

- DVMAX automatically prints a lab requisition form for IDEXX Reference Lab and Antech/Zoasis requisitions when you click **Submit** or **Print** from the Lab

Requisition floating window. This saves time and ensures accuracy over a manually completed order form. You can also Print/Submit (or, in the case of Antech, **Reprint** where needed) from the lab requisition from Patient History -> **View Requisition History**.

- When you add an MRE for a lab requisition from IDEXX Reference Lab or Antech/Zoasis, DVMAX generates a PDF with a 2D bar code lab requisition form that includes:

- Demographic information from DVMAX, including the provider account number, pet owner name, pet name, age, breed, requesting doctor (where applicable), species and gender.

- Provider-required information such as the lab order code and description.

- Any notes you type in the **Notes** area of the Edit Requisition dialog will be added to the requisition form. Before you can generate the requisition form, you must configure requisitions for each provider using the Integrations Setup Wizard.

ℹ️ Note that if you are submitting a requisition to IDEXX Reference lab and additional information is required by IDEXX, an IDEXX LabREXX panel will display in an internal browser window in DVMAX before the requisition form is generated. You will need to provide the additional details to IDEXX about the sample(s) being submitted, then close the LabREXX window before you will see the requisition form.

Requisition Status

Once you create a requisition, it passes through several stages until the associated lab results are received or the order is processed (Cubex, IDEXX Web PACS). You can view requisition status from the requisition record (the **Edit Requisition** dialog) or from **View Requisition History** on the **History** tab of a patient record.

On the **Edit Requisition** dialog, the status of the requisition is shown in the **Status** field in upper left area of the window.
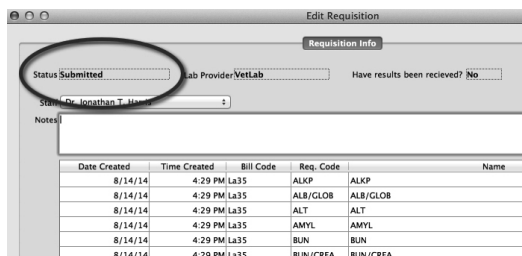
The following are the requisition statuses you may see when working with requisitions:

Open – Requisition has been created but not submitted.

Draft – An IDEXX Reference Lab requisition that has been submitted as a draft but is not yet finalized. See **Finalize an IDEXX Lab Requisition**.

Submitted – A VetLab or finalized IDEXX requisition that has been submitted.

Sent – An IDEXX Web PACS requisition that has been submitted.

Cancelled – A requisition that was submitted but subsequently cancelled.

Accessioned – A requisition that is being actively processed. Accessioned requisitions cannot be cancelled.

Completed – A requisition where lab results ordered have been received by DVMAX.

Closed – An Antech/Zoasis requisition that has been printed and closed (typically submitted after printing).

View Requisition History

You can view complete requisition history for a patient from the patient record, or view all requisition records for all patients over a selected time frame from the **Labs** window.

Requisition History for a Specified Patient

To view requisition history for a specified patient, click the **View Requisition History** button on the **History** tab of a patient record.

Requisitions are shown in chronological order. You can double click a requisition from the list to open the Edit Requisition dialog for that record. The **View Requisition History** dialog displays Date created (or date submitted for submitted requisitions), **Requisition Number**, requisition **Status** and **Modality** (provider).

Requisition History for All Patients

To view all requisitions for all patients within a specified time frame, click the **Labs** button on the Command Palette and select **Requisition** from the **Type** drop down menu. Again, requisitions are shown in chronological order. You can double click a requisition from the list to open the Edit Requisition dialog. See **Labs Window with Requisition Records** for more on the Requisition Records List.

About the Requisition Record

View a requisition record by double clicking a record from Requisitions under the **Labs** facility, or directly from a patient record by clicking **View Requisition History** from the patient **History**

tab.

A Requisition record includes several information fields at the top of the dialog, followed by the list of items included in the requisition. If results have been received (where applicable), the Requisition dialog will have 2 tabs, one fore the requisition details and one for lab results. Lab results can be viewed in better detail by selecting a results type from the Type menu of the **Labs** window. See **About the Labs Window** and **About the Lab Results Record** for more details on working with lab results records.

Status – Shows requisition status. See **Requisition Status** for more on status.

Lab Provider – Shows the name of the lab provider to which the requisition was sent.

Have Results Been Received – A Yes/No status indicating whether results have been returned for this requisition.

Staff – Shows the name associated with the requisition.

Notes – Shows any notes associated with the requisition. Notes can be typed at any time, even after results are received.

Requisition Items and Panels List Area – Shows all requisition items and panels associated with the requisition. Depending on the provider and status of the requisition, it may be possible to delete items on the list using the **Delete Test** button or resubmit a test using the **Update Test** button.

View IDEXX Result Form – Available if the provider is IDEXX, this is the result form from IDEXX.

View Requisition Form – Lets you view the original requisition PDF as submitted.

Finalize Requisition - Available if the provider is IDEXX. See **Finalize Requisition** for more information.

Cancel Requisition - Available if the provider is IDEXX and dependant on requisition status.

ℹ️ See Search for **Lab Requisition Records from the Labs Window** and About **the Labs Window** for more details on working with lab requisition and lab results records.

View IDEXX Result Form

The **View IDEXX Result Form** button on a lab requisition record or **View Result Form** button on an IDEXX lab result record will display the IDEXX result PDF generated by IDEXX.

If you click the button and there is no PDF displayed, you can re-download the result form using Control+click (Windows) or Option+click (Mac).

Search for Requisition Records from the Labs Window

You can view requisition records for a patient from the patient record, or view all requisition records for all patients over a selected time frame from the **Labs** window.

To view a requisition record:

- From the Command Palette, click **Labs**.
- From the **Labs** window, use the filters to find the record or group of records you want to view.
- Use the **Clients** field to search for results or requisitions by client name. In the **Clients** field, type a client name, or click the lookup icon to select a client name from the pick list.
- Use the **Patients** field to search for results or requisitions by patient name. In the **Patients** field, type a client name, or click the lookup icon to select a patient name from the pick list.
- From the **Type** drop down menu, select Requisitions.
- Use the **Date** filter to indentify a range in which to look for requisitions or results. Select a range from the drop down menu, or type a number of days back in the field using a number of days preceded by a minus sign. For example, to search 60 days back from the current date, type "-60".
- Select a doctor/primary provider from the **Status/Provider** menu to filter by doctor/provider.
- Requisition records displayed will match the criteria you select.
- Double-click a record to view it.

Search for Lab Results from the Lab Log

As results are returned to DVMAX, they are automatically sent to the appropriate patient record. The Lab Log keeps a record of all lab results, both pending and received.

You can access the Lab Log from the Section menu, or you can click the **Labs** icon from the Command Palette to search for, review, assign or transfer lab results – from both in-house and from external sources - as needed.

To view the Lab Log from the **Section** menu:

- From the **Section** menu, choose **Log Records**.
- The **Find** dialog opens. Select **Lab Log** from the **Search For** menu.
- Choose an option from the **By** menu:

- Patient ID and Name

- Keyword in recent entries

- Problem entries (no input)

- Lab Reference Number

- Lab Source

- Date (Date) or (start, end)

- Keyword in all entries (slow)

- **General** – Click **Search** to open a Query editor, where you can build a custom query with available tables and fields, comparison operators, and values.

- If more than one result matches the constraints you specify, you will get a list of records. Double click on a record to view. See **Viewing a Lab Requisition or Lab Result from the Labs Window** for more on viewing results and requisition records.
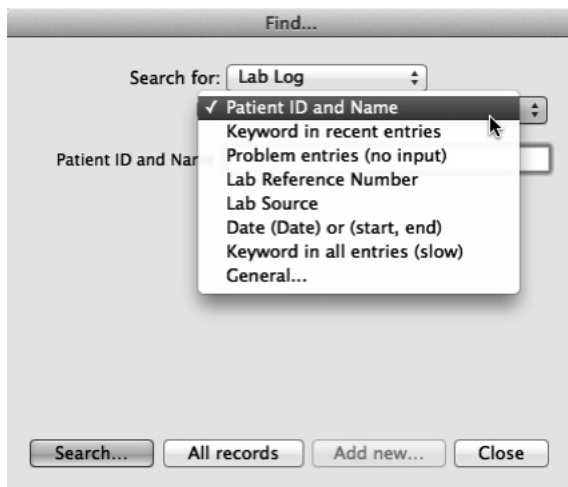
About the Labs Window

The Labs facility, accessed by clicking the **Labs** icon from the Command Palette, shows a list of lab results or requisition records matching the constraints you select using the filters at the top of the dialog. The default view shows all lab results for the current date. There is a VetConnect Plus button at the bottom of the Labs window that will take you to your VetConnect Plus homepage when clicked.

There are 7 columns on the Labs window. These columns will have different labels when viewing Requisition records or Lab result records.

Labs Window with Lab Result Records

Date-Time – Shows the date and time the result was received. In the case of requisitions, shows the date and time the requisition was created (if Open, Unsubmitted) or the date and time the

requisition was submitted.

Type – Shows the lab provider.

Destination – Shows the name of the patient associated with the requisition or result. If DVMAX could not identify a patient to which to assign the record, DVMAX will state "Patient Not Specified".

Viewed – Shows if the results were viewed. This column does not apply to requisitions.

Contacted – Shows if the client associated with the result has been contacted. This column does not apply to requisitions.

Reconciliation – Indicates whether reconciliation is required for the record. Reconciliation is a process that helps ensure accurate charge capture for lab services on invoices by comparing the requisition items to the results returned by the lab. See **Reconciliation of Lab Results** for more on reconciliation. This column does not apply to requisition records.

Note – Shows the client name, patient name and doctor name associated with the record.

Labs Window with Requisition Records

Date-Time – Shows the date and time the requisition was submitted. In the case of open requisitions, shows the date and time the requisition was created.

Type – Shows record type.

Destination – Shows the name of the patient associated with the requisition.

Modality – Shows name of lab provider associated with the requisition record.

Status – Shows status of the requisition.

Results – Indicates whether results have been received.

Note – Shows any notes that may have been entered in the Notes area of the requisition record.

Search for Lab Results from the Labs Window

As results are returned to DVMAX, they are automatically sent to the appropriate patient record. DVMAX keeps records of all lab requisitions and results, including submitted requisitions and pending and received results. You can view Lab activity – both from in-house equipment and external labs - from either the **Lab Log** under the **Section** menu or by clicking the **Labs** button on the Command Palette.

⚠ This information applies to lab results, not IDEXX Web PACS results. You will need to view Patient History and click the Web PACS button to review any new images that may be available for the patient.

Use the **Labs** icon from the Command Palette to search for, review and assign or transfer lab results as needed.

To search for lab results from the Labs facility:

- Click the **Labs** button in the Command Palette.

- From the **Lab Results** window, use the filters to find a lab requisition or result record.

- Use the **Clients** field to search for results or requisitions by client name. In the **Clients** field, type a client name, or click the lookup icon to select a client name from the pick list.

- Use the **Patients** field to search for results or requisitions by patient name. In the **Patients** field, type a client name, or click the lookup icon to select a patient name from the pick list.

- Select **Include Partial Results** to include partial lab result records in the search. A partial result is a record that is only one part of the requested order.

- From the **Type** drop down menu, select a type of record. Options include All Lab Results, Antech/Zoasis Results, IDEXX Results, In-House Lab Results, Marshfield Lab results and Lab Requisitions.

- Use the **Date** filter to indentify a range in which to look for requisitions or results. Select a range from the drop down menu, or type a number of days back in the field using a number of days preceded by a minus sign. For example, to search 60 days back from the current date, type "-60".

- Select a doctor/primary provider from the **Status/Provider** menu to filter by doctor/provider.

- Lab records displayed will match the criteria you select.

About the Lab Result Record

View a lab result by double clicking a record from the Labs facility, or directly from the patient History tab of an MRE.

A lab result record includes several non-editable information fields at the top of the dialog.

The main body of the results record is a tabbed area with a Results tab and a Reconciliation tab.

Assign or **Transfer** – To assign or transfer results to a specified patient record.

Owner Contacted – A selectable box to indicate whether the client associated with the patient record has been contacted about the lab results.

Results tab – Shows the lab results in a chart format.

Text tab – Shows the lab results in text format.

Reconciliation tab - Reconciliation is a process that helps ensure accurate charge capture for lab services on invoices by comparing the requisition items to the results returned by the lab. See **Reconciliation of Lab Results** for more on reconciliation. This column does not apply to requisition records. This tab will show you a comparison of what was ordered and what was received and allow you to make changes, as needed, to the invoice.

Delete – Lets you delete the results record. Deleting the record does not remove any associated charges from an invoice or remove the record from patient History.

Cancel – Close the results record without saving any changes.

OK & View Patient – Saves your changes and takes you to the patient record.

View IDEXX Result Form – Available if the provider is IDEXX, this is the result form from IDEXX.

View Requisition Form – Lets you view the original requisition PDF as submitted.
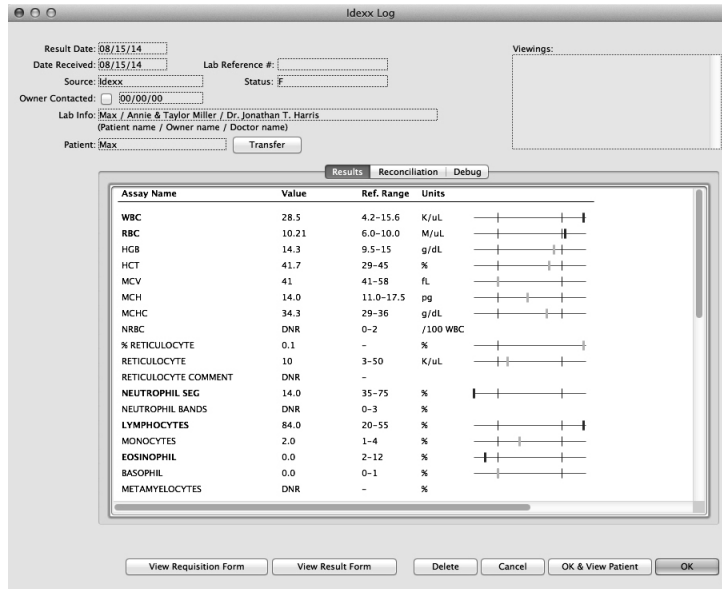
ℹ️ See **About the Lab Requisition Record** for more details on working with lab requisition records.

View a Lab Results Record from the Labs Window

To view a lab results record:

- From the **Labs** window, use the filters to find the record or group of records you want to view.

- Double-click a record to view it.
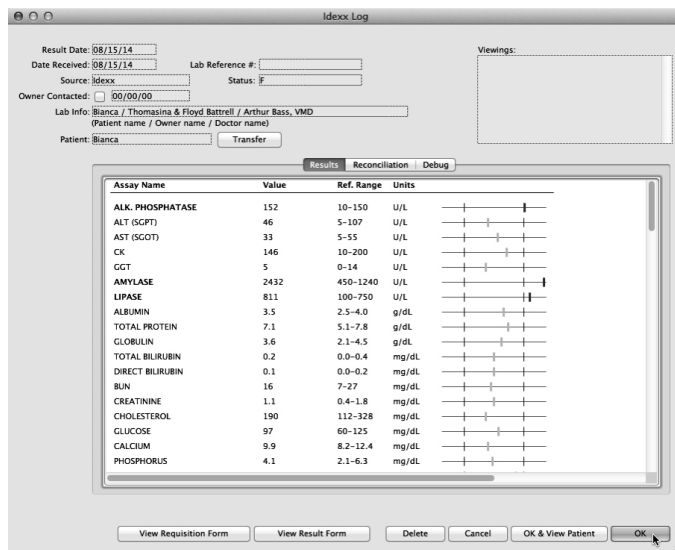
- Click **Assign** to assign this record to a patient if needed. You will only see this option if the results need to be assigned. This option only applies to lab results, not requisition records.

- If the results have already been assigned but you want to move the results to a different patient, click **Transfer**. You will only see the **Transfer** option if the results are already assigned. This option only applies to lab results, not requisition records.

- Select **Owner Contacted** if the client has been contacted about the results. This option only applies to lab results, not requisition records.

- Click the **Reconciliation** tab to review lab results reconciliation requirements. See **Reconciliation of Lab Results** for more about reconciliation.

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

- DVMAX asks if you want to record this viewing of the lab log.

- Click **Yes** to record the viewing. The current date is inserted in the **Viewed** column of the Lab Results window. Click **No** if you do not wish to record a record of viewing the results.

- The record closes.

Delete a Lab Result Record

It is possible to delete a lab result record from the lab log. Deleting the lab record does not remove any associated charges from an invoice or remove the record from patient **History**.

To delete a lab result:

- Click **Delete** to delete the lab record and remove it from the Lab Results window.

- From the Confirm dialog, click **OK** to confirm you want to delete the record.

- The record is removed from the lab log. The lab results remain in patient History.

Patient Not Found

If lab results received cannot be matched to an existing DVMAX patient, the **Lab Info** field of the Lab Result record will display Patient Name, species, gender, spayed/neutered, patient ID (in brackets) and Client Name associated with the lab result. Results can be manually assigned, where needed, using the **Assign** button on the result record.

About Partial Lab Results

From time to time, lab results are sent to DVMAX in parts rather than all at once. For example, a requisition may have included 3 tests, and the results for the 3 tests may be received individually. These are known as partial results. Partial results are not placed in the patient record until all items ordered are delivered to DVMAX.

To include partial results records when looking at the **Labs** window, select **Include Partial Results** at the top of the **Lab Results** dialog.

VetLab and Partial Lab Results

When you submit a requisition to the VetLab Station Network, the status of each line on the requisition will be shown on the requisition results, and results may be returned as partials, especially if multiple blood analyzers connected to the VetLab are used to process samples.
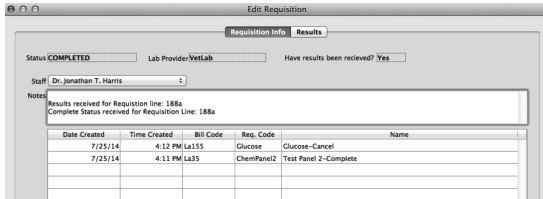
Viewing Lab Results from the Patient Record

In-House Lab Results

Lab results can be viewed by clicking the **Labs** button from the Command Palette. The in-house lab results can also be reviewed from a patient record by looking at the record from patient **History**, or by using the **Chart Labs** option. The Chart Labs feature allows you to select any number of assays from a list of available results, then chart the selected results.

To chart in-house blood results:

- From a patient record, select the **History** tab.
- Click **Chart Labs**.

- Select the date range within which to search for results. Type the **Start Date** and **End Date** or use the **Calendar** function to select a date range.

- Click **OK**.
- From the **Assay List**, select the items you would like to chart.

- Click again to deselect an item. If there are no items on the list, no in-office blood results were found within the specified date range.

- Click **Chart** on the **Assay List** window to build the assays chart.

- Selected Assays are displayed on a graph.

Assigning the Lab Log Record

DVMAX will automatically assign lab results to the appropriate patient record. Sometimes, however, results need to be manually assigned, such as when results are returned with the patient not specified.

As well, sometimes results assigned to one patient may need to be transferred to another, such as may happen if a user accidentally assigns a result to the wrong patient. To assign or transfer results from the **Labs** window:

In the Lab Log window, double-click a record to open it.

- Click **Assign** to open a Patient pick list, allowing you to assign the record to the appropriate patient. This option will only display if the result record needs to be assigned.

- If a result has already been assigned but you wish to transfer the results, click **Transfer** to open a Patient pick list, allowing you to transfer the results record to the appropriate patient.

- Once a patient is assigned to the record, you may view the Patient record from the Log record window.

- Click **OK and View Patient** to open the patient record.

- You are prompted to record the viewing of the lab log. To record the viewing, click **Yes**. Otherwise, click **No**. If you click **Yes**, the viewing is recorded in the Lab log record, in the Viewings box.

Manually Associating Incoming Results with Patient Records

If DVMAX cannot determine the patient ID from an incoming lab test result, you will be notified and asked to provide the correct patient ID for the result. Unassigned results in the results listing will not have an associated Client/Patient. When you open an unassigned record, the **Assign** button will be enabled. See **Assigning the Lab Log Record**.

Reconciliation of Lab Results

Reconciliation is a process that helps ensure accurate charge capture for lab services on invoices by comparing the requisition items to the results returned by the lab. **For Cubex orders, see Reconciliation and Cubex**. Reconciliation may be required when the test items received differ from what was requested via the submitted lab requisition. For example, if you submit a lab requisition and the returned results include some add-on items not part of the original requisition. Alternatively, the results received may be missing one or more tests or panels that were requested on the original requisition.

The process of reconciliation lets you decide whether any charges have been applied to an invoice that should be removed or whether there are charges that need to be added to an invoice based on the differences between requested tests and tests received.

Reconciliation Status

From the **Labs** window, you can view the reconciliation status of lab results.

The **Reconciliation Required** column of the Lab Results list will show one of 3 statuses:

Required – Recommended that you review the items on the **Reconciliation** tab of the lab result to determine if you want to make changes to the invoice on which the bill item(s) associated with this lab result appear. Once you have checked the reconciliation details, selecting **Reconciliation Has Been Completed** from the **Reconciliation** tab of the lab results record with change the reconciliation status to Completed.

Not Required – Reconciliation is not required. You can still review the **Reconciliation** tab of the lab result record, but no reconciliation is required.

Completed – This record has been reviewed already and the **Reconciliation has been completed** checkbox on the **Reconciliation** tab has been selected.

About the Reconciliation Tab of a Lab Results Record

You view and work with reconciliation features from the **Reconciliation** tab of a lab result. The Reconciliation tab is made up of some general information fields at the top of the dialog and 4 list areas. The general information at the top of the Reconciliation tab includes the same fields as seen fields as seen at the top of the Results tab of the lab result record, such as **Result Date**, **Date Received** and lab **Provider** name. The 4 list areas on the reconciliation are described in their own sections.
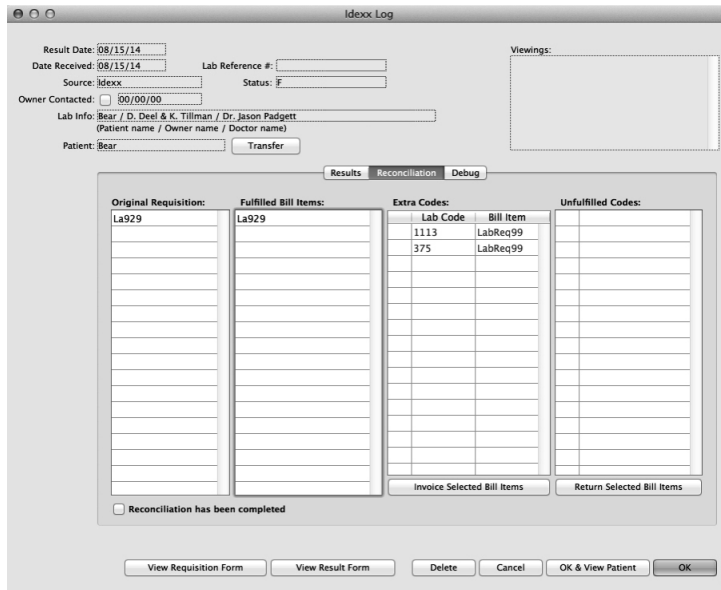
Original Requisition List Area of the Reconciliation Tab

The Original Requisition list area is the leftmost list box on the Reconciliation tab. All of the bill item codes linked to lab Provider codes on the original requisition are listed in the Original Requisition list area. In other words, this is the "what you asked for on your lab requisition" list.

Fulfilled Bill Items Area of the Reconciliation Tab

The **Fulfilled Bill Items** list area is the second list box from the left on the Reconciliation tab. That list area shows all bill item codes associated with results that came in with this lab record. This is a list showing which items you requested, you received.

Extra Codes on the Reconciliation Tab and Invoicing

DVMAX compares the requested codes in the **Original Requisition** list to the items in the **Fulfilled Bill Items** list. These should be the same. If they are not, any additional items are listed in the **Extra Codes** area, while any results not received are listed in the **Unfulfilled Codes** area. These provider-specific lab codes may or may not be linked to an existing DVMAX bill item. If they are linked to an existing DVMAX bill item, you will see both the code from the lab provider in the **Lab Code** column and the linked DVMAX Bill Item code in the **Bill Item** column. If the lab code is not currently linked to an existing DVMAX Bill Item Code, DVMAX will place a generic bill item code, LabReq99, in the Bill Code field for the purpose of allowing the user to add this lab item to an invoice.

You can choose to add any of the extra codes to an invoice by selecting the item(s) from the **Extra Codes** list and clicking **Invoice Selected Bill Items**.

To add extra codes to the invoice:

- From the **Extra Codes** area, select the item(s) you want to add to the invoice by clicking in the field beside the Lab Code.

- An item is selected when an asterisk is in the leftmost column for the item you want to add to an invoice. Click again to deselect.
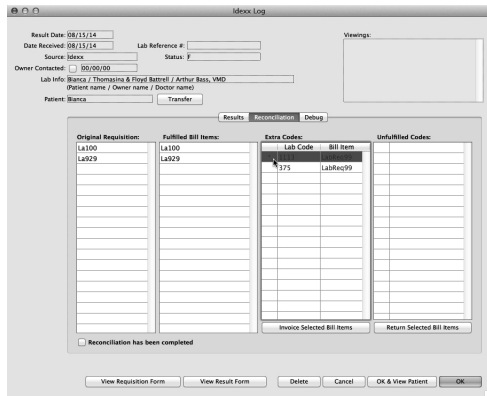
- Click **Invoice Selected Bill Items**.

- An Item Description **Request** dialog displays. Type a description for the lab item. Click **OK** to continue.

- Another Item Price **Request** dialog displays for you to type a price for the item. After entering a price, click **OK** to continue.

- The Invoice opens. Note that any new items are added to the invoice. Proceed with the invoice as desired (close, finish, print or apply payment to the invoice).

Unfulfilled Codes on the Reconciliation Tab and Invoicing

DVMAX compares the requested codes in the **Original Requisition** list to the items in the **Fulfilled Bill Items** list. These should be the same. If they are not, any additional items are listed in the **Extra Codes** area. Any bill items requested/invoiced but not delivered as per the requisition will display on the **Unfulfilled Codes** area of the **Reconciliation** tab. It may be the case that you have billed for an item for which no result was received, and you can choose to remove the bill item from the invoice.

You can choose to remove any of the unfulfilled items from an invoice by selecting the item(s) from the **Unfulfilled Codes** list and clicking **Return Selected Bill Items**.

To remove unfulfilled bill items from the invoice:

- From the **Unfulfilled Codes** area, select the item(s) you want to remove from the invoice by clicking in the field beside the bill item.

- An item is selected when an asterisk is in the leftmost column of the item you want to remove from the invoice. Click again to deselect.

- Click **Return Selected Bill Items**.

- DVMAX creates a return for the selected item(s).

Reconciliation Completed

After you have reviewed the information on the **Reconciliation** tab and made any necessary changes, select the **Reconciliation Has Been Completed** checkbox at the bottom left of the Reconciliation dialog to mark this as completed. The status of the reconciliation on the **Reconciliation Required** column of the Lab Results list will change to **Completed**.

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Reconciliation and Cubex

Reconciliation takes place automatically for Cubex orders. When the quantity supplied differs from the quantity requested, Cubex will make necessary adjustments to the invoice automatically. Be sure to review the invoice carefully.

Accessing VetConnect PLUS from DVMAX

You can access IDEXX VetConnect PLUS directly from the DVMAX Lab Results dialog. To open VetConnect PLUS in DVMAX:

- Click the **Labs** button in the Command Palette.

- From the **Lab Results** dialog, click VetConnect Plus. The VetConnect Plus window will open inside DVMAX.

- Use VetConnect as you would normally.

If you have any questions about VetConnect, your IDEXX VetConnect account or your VetConnect Plus credentials, please contact IDEXX VetConnect.

If DVMAX is not able to match a patient with a VetConnect PLUS account or with a Reference Lab result, the VetConnect PLUS home page will launch. The VetConnect PLUS home page provides additional search, setup and review options.

Inventory Items

You can use DVMAX to keep track of the physical goods, such as medications, food and other products, that you sell to your clients. You can monitor monthly sales and quickly reorder an item when DVMAX tells you that it is running low. DVMAX's inventory management features can help also help you write prescription labels, track controlled substances, and keep track of costs.

DVMAX comes pre-supplied with records for thousands of the most common Inventory Items sold in veterinary practices. Most often, you will edit existing Inventory Items rather than add new ones.

DVMAX also provides an easy-to-use method of recording your inventory purchases – see **Purchases** for more information.

What Inventory Items Are Not

You do not sell Inventory Items directly. In DVMAX, inventory items are linked to Bill Items. Bill Items, and not Inventory Items, are entered on Invoices and sold to clients.

See **Bill Items** and **Invoicing** for more information.

Search for Inventory Items

To find an Inventory Item in DVMAX:

- Select **Inventory Management** 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** dialog, choose a criterion (Item Code, Description, Keyword in Description, Reorder, Expiration Date, or On Order) from the **By** drop-down list. See **Search Criteria** for more information.

- If necessary, type an Item Code, Description or Expiry Date in the field provided. See **Search Criteria** for more information.

- Click **Search.**

- If there is more than one match for your search, the **Inventory Items** window will display a list of items that matched your search.

- If there is only one Inventory Item that matches your criteria, that Inventory Item record will open.
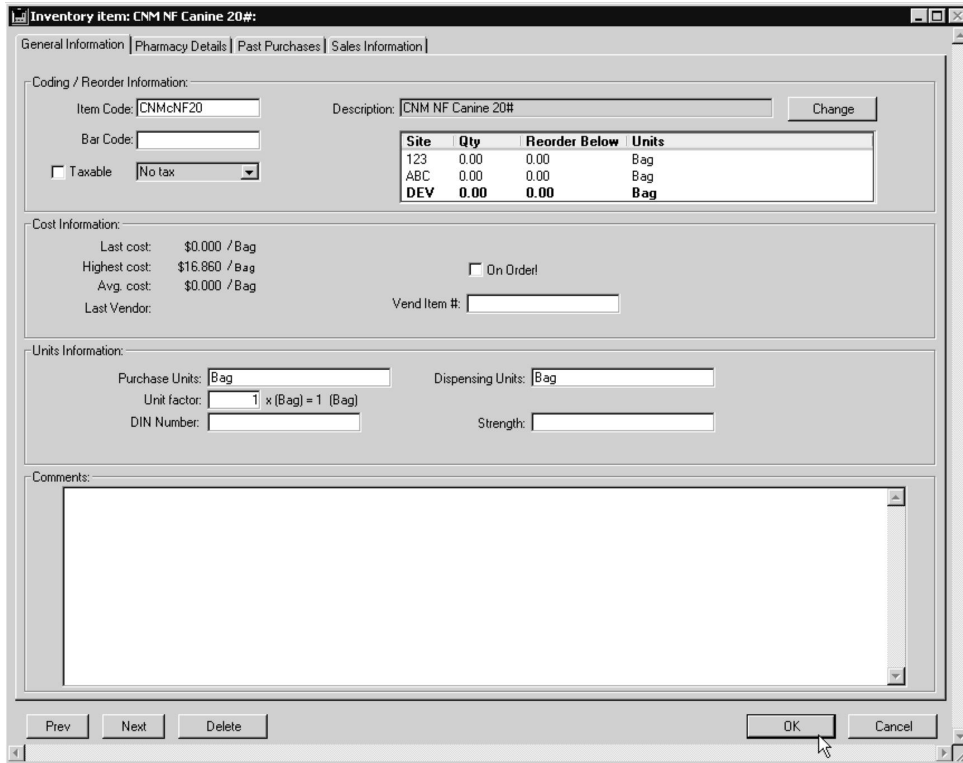
- If there are no matches, DVMAX will display a message to that effect and return you to the **Find** window to search again.

Inventory Item Record Search Criteria

DVMAX provides six predefined ways to search for Inventory Items. A description of each follows. You can also choose to use the General Search option and define your own search criteria. See the **General Searches** chapter for more information.

Item Code

An **Item Code** search locates an Inventory Item using the item's code. If you do not know the entire item code, type as much of the start of the code as you know and click **Search**. DVMAX will show a list of all items whose code starts with what you typed.

Description

A **Description** search finds Inventory Items using the items' Description field. Your search term does not need to be an entire word. Note that a Description search will only match from the start of the description – that is, you must know the exact start of the description to find any matches.

Keyword in Description

A **Keyword in Description** returns a match if what you type is found anywhere in an item's description. The term you type does not need to be an entire word.

Reorder

Reorder (no input) finds all items whose stock has fallen below their reorder minimum. Use this search to see a list of items that need to be ordered.

Expiration

Expiration (enter date) finds Inventory Items that have lots that will expire by the entered date. The format for all dates in DVMAX is MM/DD/YYYY. This search is helpful to identify items that have expired or will expire soon.

On Order

On Order (no input) finds Inventory Items that have been entered on a Purchase Order. This list is helpful to avoid double-ordering items that are low in stock.

The Inventory Items Window

The Inventory Items window contains a list of Inventory Item records that match your search. You can see at a glance an item's code, description, quantity on hand, cost to your practice, and reorder status.

To select and view an Inventory Item from the Inventory Items window:

- Double-click the Inventory Item you wish to view

-OR-

- Click once on the Inventory Item you wish to view, and then click **Show**.

Creating a New Inventory Item

Following are the general steps involved in creating a new Inventory Item record. For more information on each step, see the appropriate section of this chapter.

- Open a new **Inventory Item** screen.

- Fill out the **General Information** tab of the Inventory Item screen.

- If the new Inventory Item is a Pharmacy item, fill out the **Pharmacy Details** tab.

- Click **OK** to save the new Inventory Item.

Opening a New Inventory Item Screen

You can create a new Inventory Item from either the **Inventory Items Window** or the **Find** window. For more information on these locations, see **Finding Inventory Items**

To create a new Inventory Item from the **Inventory Items Window**:

- Choose **Add New** from the **Inventory Items** menu
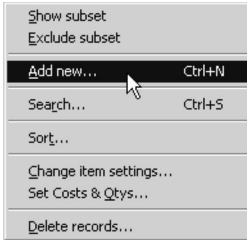
-OR-

- Click the **Add New** button at the bottom of the **Inventory Items Window**.

To create a new Inventory Item from the **Find Window**:

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

ⓘ CONTROL+N (COMMAND+N on Macintosh) is a keyboard shortcut for creating a new Inventory Item from either location.

Create an Inventory Item Record

The Inventory Item tabbed dialog is made up of four tabs: **General Information**, **Pharmacy Details**, **Past Purchases** and **Sales Information**.

To create a new Inventory Item record, you must complete the details **General Information** tab. If the Inventory Item is a prescription item, you must also complete the **Pharmacy Details** tab.

To create a new Inventory Item record:

- Type a unique code for this item in the **Item Code** field. The code you type can be a maximum of 12 characters.

- Type a short description of this item in the **Description** field. The description you type can be a maximum of 35 characters.

- If you are using a bar code system, type the item bar code in the **Bar Code** field.

- If your practice **pays** tax on the purchase of this item, click to select the **Taxable** checkbox, and choose a tax type from the **Tax** drop-down list. Tax rates are set in the **Finance Constants** section of **System Constants**.

The **Taxable** checkbox does **not** indicate that you charge sales tax on this item when you sell it to a client. It indicates whether your practice pays tax on the item.

- If you know the Vendor Item Number for this item, type it in the **Vend Item #** field.

You can make reordering an inventory item quicker and easier by using the vendor's own stock or item number when reordering.

- Type the units that you purchase this item in into the **Purchase Units** field. For example, canned food is purchased in **cases** of cans, and medications can be purchased in **bottles** of tablets.

- Type the smallest unit that you dispense this item by into the **Dispensing Units** field. For example, you may sell food by the can, or medications by the tablet.

Provide as much information as possible when filling in the Purchase and Dispensing Units. It is helpful, for example, to use "Case of 24" instead of just "Case", "Bottle of 250 tabs" instead of just "Bottle", "Box of 12 vials" instead of just "Box". Placing clear, descriptive

names in these fields will make it easier to link these items to Bill items and to understand the relationships between items purchased and items sold.

- Type the number that defines the relationship between Dispensing and Purchase Units into the **Unit Factor** field. For example:

  - a canned food purchased in cases of 24 cans and sold by the can has a unit factor of 24.

  - a medication purchased in bottles of 100 tablets and sold by the tablet has a unit factor of 100.

  - A saline solution purchased by the liter and sold by the liter has a unit factor of 1.

⚠ You cannot add a Unit Factor of 0.

- If this item is a Pharmacy item, type its Drug ID number into the **DIN number** field. DIN numbers are not used n the U.S.

- If this item is a Pharmacy item, type its concentration into the **Strength** field.

- Type any remarks about this item into the **Comments** field.

The Pharmacy Details Tab

Filling out the Pharmacy Details tab involves providing general information about the Inventory Item and specific information about any lots of this item you have on hand.

To complete the Pharmacy Details:
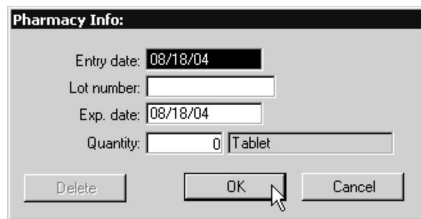
- Click to select the **Rx Label Item** checkbox if you want to use DVMAX's pre-scription labeling features with this item.

⚠️ All prescription Inventory Items must have their **Rx Label Item** checkbox selected in order for Prescription labeling to work properly.

- Type the common instructions that will appear on the prescription label into the **Default Label Directions** field.

- Click to select the **Schedule**, if any, that this item falls under. This information is useful for tracking controlled substances.

- Type a default dispensing quantity for this item into the **Default Dispensing Qty** field.

- Type the number of days until this medication expires after reconstitution into the **Reconstitute Exp. (days)** field. DVMAX uses this value to calculate the label expiration date for reconstituted medications (e.g. a medication will expire 14 days after it is reconstituted for dispensing to the patient).

- Choose **Add Pharmacy Info** from the **Pharmacy Info** drop-down menu.

-OR-

- Double-click in the **Listing** field (the area of the screen with Qty, Units, Lot # and Expiry Date columns).

- Type the **Entry Date** (typically the current date), **Lot Number**, **Expiry Date** and **Quantity** (how many items, measured in dispensing units) into the Pharmacy Info window.

- Click **OK** to save the information you typed in the Pharmacy Info window.

- Click **OK** to save the Inventory Item.

ℹ️ Information about individual lots can also be entered at when you record the purchase of an Inventory Item. Recording the purchase of a Prescription item will automatically present the Pharmacy Info dialog. See **Purchases** for more information.

Modifying an Inventory Item

To modify an Inventory Item:

- Select **Inventory Management** from the **Section** drop-down menu.

- From the **Find** dialog, choose a criterion (**Item Code**, **Description**, **Keyword in Description**, **Reorder**, **Expiration Date**, or **On Order**) from the **By** drop-down list. See **Finding Inventory Items** for more information.
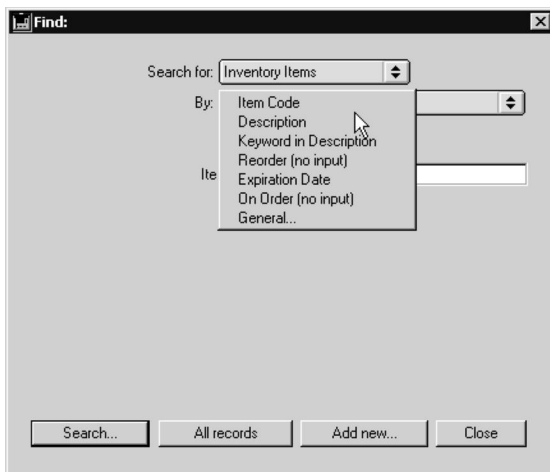
- If necessary, type an **Item Code**, **Description** or **Expiry Date** in the field provided. See **Finding Inventory Items** for more information.

- Click **Search**.

- If a list of matching Inventory Items appears, double-click the one you wish to edit.

- Make the necessary changes in the **General Information** and/or **Pharmacy Details** screen. See **Filling Out the Inventory Item Screen** for details.

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

Updating the Unit Factor

On rare occasions you may need to change an Inventory Item's purchase and dispensing units, and the Unit Factor that relates them. This may happen because you want to update your inventory, your supplier changed their packaging, or for any number of other reasons.

When the unit factor changes, DVMAX must preserve existing relationships of this Inventory Item to other information (i.e. links to Bill Items for sales to Clients, records of past sales & purchases, etc.).

⚠️ You cannot add a **Unit Factor** of 0.

In order to do this, DVMAX will attempt to determine how you have altered the unit relationship and offer to handle the change retroactively as best it can by presenting a dialog that asks you to choose how to handle the change.
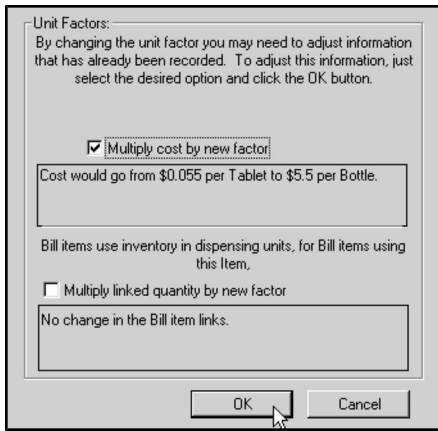
Changing the Purchase Units & Unit Factor

The most common situation arises when you change an item that previously had a unit factor of 1 to show the actual purchase units (e.g. **Bottle** of **100** tabs, **Box** of **12** vials, etc.). In this situation you should choose **Multiply cost by new factor**.

Changing the Dispensing Units & Unit Factor

Your practice may start selling items individually that were previously only sold in bulk. In this situation you should choose **Multiply linked quantity by new factor**.

This will update any Bill item links to this Inventory item so that the proper quantity of inventory is removed each time the item is sold.

For example, if you previously only sold food by the case and have decided to start selling it by the can as well, DVMAX now needs to count inventory for this item in cans as well as cases. When changing the dispensing units to "Cans" we need to update the Bill Item links to make certain that each time a case of food is sold the appropriate number of cans are deducted from inventory.

See **Bill Items** for more information on the link between Inventory Items and Bill Items.

Deleting an Inventory Item

To delete an Inventory Item:

Find the Inventory Item(s) you wish to delete by following the steps in **Finding Inventory Items.**

- Click the **Delete** button on the Inventory Item record.

-OR-

- On the **Inventory Items** screen, select the items you wish to delete.
- Choose **Delete Records** from the **Inventory Items** drop-down menu.
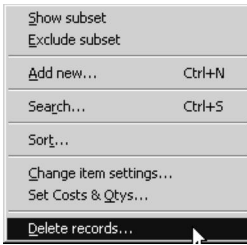
⚠️ Deleting Inventory Items can have serious effects on your sales data. If you are unsure about whether to delete an item, please contact DVMAX Technical Support.

Viewing Past Purchases

To view your practice's past purchases of an Inventory Item:

- Find the Inventory Item you are interested in by following the steps in **Finding Inventory Items.**
- Click the **Past Purchases** tab at the top of the Inventory Item tab.
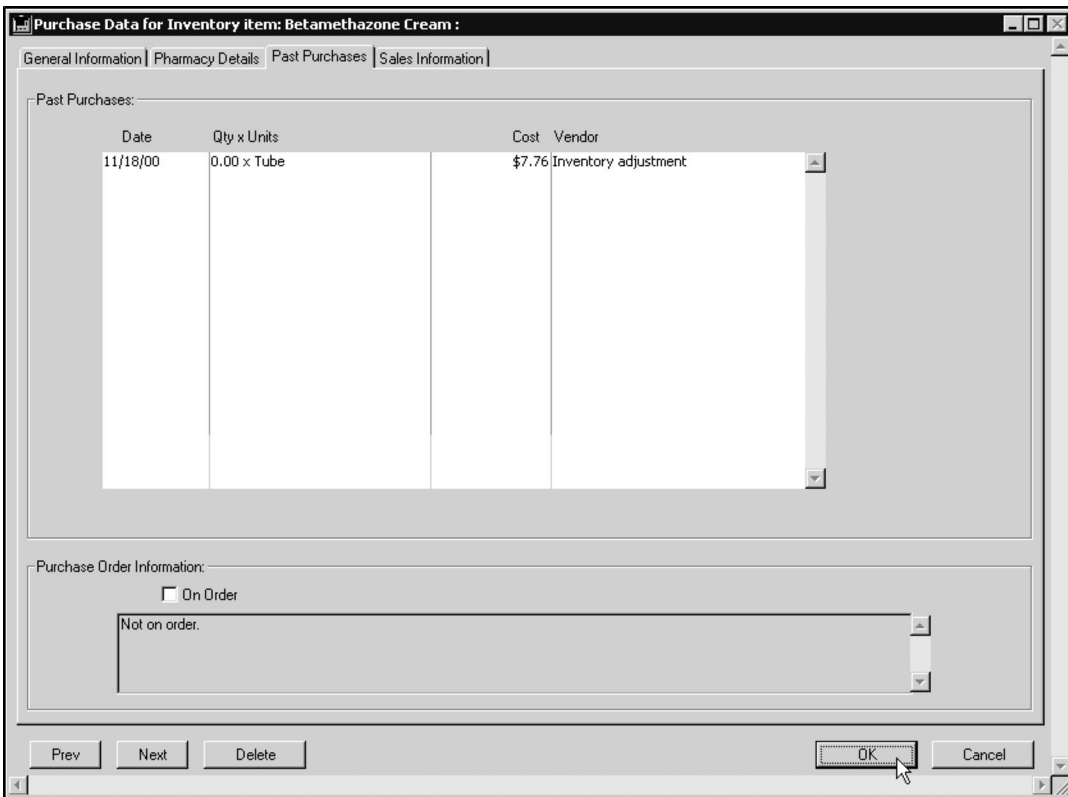
Past Purchases are listed in reverse chronological order. You can see the date, Quantity, Cost and Vendor for each purchase.

⚠️ Quantities shown may be in either **Purchase** or **Dispensing** units. For more information, see **Showing Purchase or Dispensing Units**.

Viewing Sales Information

To view Sales Information for an Inventory Item:

- Find the Inventory Item you are interested in by following the steps in **Finding Inventory Items.**

- Click the **Sales Information** tab at the top of the Inventory Item dialog.
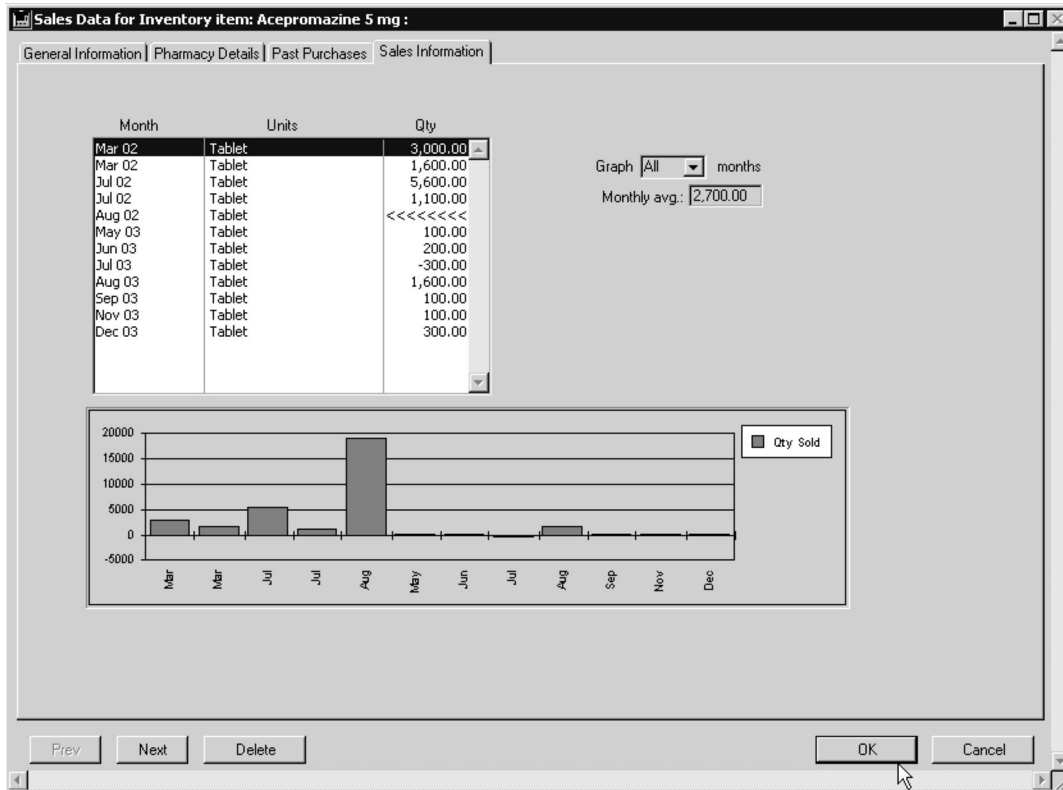
- The list in the upper left shows Months, Units, and Sales Quantity for each past months. DVMAX calculates and shows the monthly sales average in the **Monthly Avg.** field to the right of the screen.

⚠️ Quantities shown may be in either **Purchase** or **Dispensing** units. For more information, see **Showing Purchase or Dispensing Units**.

The Sales Information Graph

The graph in the lower part of the **Sales Information** tab represents, by default, all sales information shown in the list in the upper left of the screen. To change the date range of sales information in the graph:

- From the **Graph** drop-down list, choose how many months you would like to see graphed. DVMAX will count down from the currently selected month in the list of monthly sales.

Inventory Reports

DVMAX offers seven printed reports for Inventory Items. Each report can work on a selection of Inventory Items. To generate a printed Inventory Item report:

- Select **Inventory Management** 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
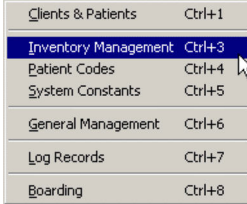
- To generate a report on all Inventory Items in your practice, click **All Records** on the **Find** dialog.

-OR-

- Use the **Find** window as described in **Finding Inventory Items** to find the items you wish to report on.

- If necessary, you can further narrow the items to report on by selecting those you are interested in from the **Inventory Items** dialog. Press the CONTROL key (COMMAND on Macintosh) while clicking to select multiple items.

- Choose **Print** from the **File** drop-down menu. The **Printing Options** dialog displays.

Change user
Show Window List
Preferences...
Page Setup
Print...
Print Custom Label
Quit   Ctrl+Q
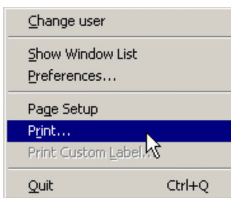
- Click to highlight a report type from the list. See **Report Types** for information on each.

There are 7 records to be printed.

Select a report:
- Work list
- Reorder list
- General list
- Net value
- Export
- Labels...
- Custom...

☑ Page Setup
☐ Sort selection

[Print] [Cancel]
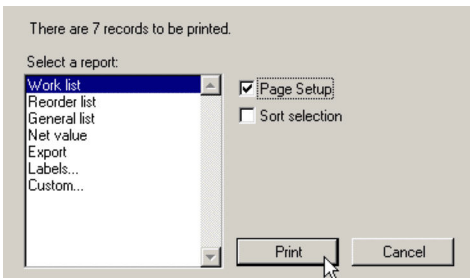
- Select the **Page Setup** checkbox if you would like the Page Setup dialog to appear before the report is printed.

- Click **Print** to generate the report.

Report Types

Below is a list of Inventory Item reports, and a description of the information they provide.

- **Work List**: Prints a list of the selected items including code, description, quantity on hand and a blank line for actual quantity. This report is generally used for counting a physical inventory.

- **Reorder List**: Prints a report listing code, description, reorder level, quantity on hand, average sales per month and last vendor information. The default option for this report allows it to be sorted by last vendor.

- **General List**: Prints the inventory code, description, quantity on hand, unit cost and average cost.

- **Net value**: Prints a report calculating the net value of inventory items. Listed on this report is the code, description, quantity on hand, last cost, net value and a grand total.

- **Export**: Allows inventory item information to be exported from the DVMAX system.

- **Labels**: Allows labels to be printed with inventory information.

- **Custom**: Prints a custom report with any inventory information.

Showing Purchase or Dispensing Units

DVMAX can display quantities of an Inventory Item in either purchase or dispensing units. All calculations are based on the Unit Factor. See **Creating a New Inventory Item** for a discussion of units and the Unit Factor.

To change an Inventory Item's display mode, you must first be viewing the Inventory Item tabbed dialog.

- From an inventory item record, select the **Inventory Item** drop-down menu.

- Choose **Show Purchase Units** to view all quantities of this Inventory Item in purchase units. Choose **Show Dispensing Units** to view all quantities in dispensing units.
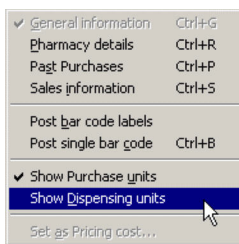
- Your choice of purchase or dispensing units applies to all areas of the Inventory Item record, including quantity on hand, reorder amount, costs, past purchases and sales.

"On Order" Status

An item will be marked as "On Order" when you enter a Purchase Order for the item (see **Purchases** for more information). You should **not** mark an item as "On Order" with the "On Order" checkbox on the **General Information** or **Past Purchases** tabs.

Invoicing

A typical invoicing system allows you to bill your clients for products and services. DVMAX's invoicing system has this basic capability but is much more powerful. In DVMAX, an invoice has a two-way relationship with your patient records: an invoice will update a patient record and a patient record can create and update an invoice.

Standard Invoicing in DVMAX can update a patient's record every time a line item is added to an invoice. See **Invoices and Patient Histories** for more information. DVMAX's **Invisible Invoicing** feature can automatically create invoices for you as you work on patient records. Invisible Invoicing is the heart of a paperless office, where all information goes directly into the patient record and DVMAX generates billing from those entries. See **Invisible Invoicing** for more information. **Over-the-Counter** invoices record walk-in sales that are not associated with regular clients of your practice. See **Over-the-Counter Invoices** for more information.

Regardless of how a particular invoice is created, invoicing keeps track of products and services provided to your clients. If you are using DVMAX's inventory tracking features, an invoice decreases appropriate inventory records. Invoices also form the basis of many financial reports. See **Financial Reports** for more information.

Invoices and Patient Histories

Every line item on an invoice in DVMAX is associated with a specific patient. This relationship means that when a line item is added to an invoice, it is also added automatically to the history of the associated patient. This powerful feature means that the invoice can be the entry point for keeping track of your practice's financials **and** your practice's patients in DVMAX. It also means that you should take care to ensure that you name the correct patient on each line item of every invoice you create.

A setting in **System Constants** controls exactly when the Invoice updates the patient record. For more information, see **Post History & Discharge Notes from Unfinished Invoices** in the **System Constants That Affect Invoicing** section of this chapter. Bill Items control the relationship between patient records and invoices. For detailed information on Bill Items, see the **Bill Items** chapter of this manual.

Updates Performed Via Invoice Line Items

Invoice line items can cause the following kinds of updates to patient histories:

> **Reminders: Each item on an invoice can update, create or remove reminders from the Patient record.**

> **Recalls: Each item on an invoice can update, create or remove recalls from the Patient record.**

> **Medical Record Entries: Each item on an invoice can create a Medical Record Entry on the Patient record.**

> **Diagnoses: Each item on an invoice can create a diagnosis history entry on the Patient record.**

> **Discharge Notes: Each item on an invoice can add a Bill Item's discharge notes to the Patient record.**

For more information on these updates, see the **Bill Items** chapter of this manual.

Create an Invoice: An Overview

In order to create a new invoice, the following conditions must be met:

- The client you are invoicing must be an active client.

- The client you are invoicing must have at least one patient.

DVMAX allows you to start a new invoice from either the client record or the patient record. There are several steps involved in filling out an invoice. The exact sequence depends on your DVMAX configuration and the particular items that will appear on the invoice. The steps below are a general overview. For more information on each step, see **Invoice Data Entry Details**.

To create a new invoice:

- Open the Client record for which you want to prepare an invoice.

- Choose **Create an Invoice** from the **Client** drop-down menu.

-OR-

- Open the Patient record for which you want to prepare an estimate.

- Choose **Create an Invoice** from the **Patient** drop-down menu.

- The new invoice will be titled "Invoice **xxx** for **Client Name**", where **xxx** is a unique invoice number generated by DVMAX and **Client Name** is the name of the client you are billing.

- The current date will be in the **Date** field. You may type a different date in the date field if needed. The default format for all dates in DVMAX is MM/DD/YYYY. Changing the date here will change the date for all new and empty line items on this invoice. The date is set to the current date each time an invoice is viewed and modified.

ⓘ Changing the date here can change the date this invoice becomes due, and affect your receivables. See **Backdating an Invoice**.
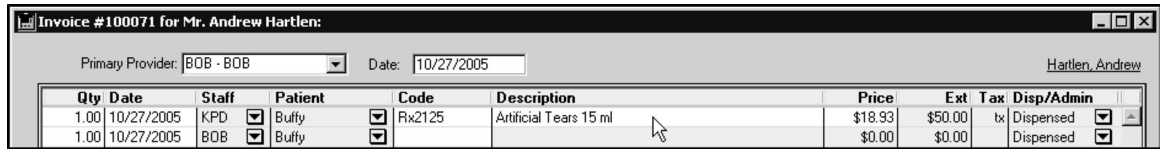
- Type the details of the product or service you are selling in a Line Item row. Include the **Quantity** of the item sold, **Date** (if different from the current date), **Staff** (if different from the Primary Provider), and **Item Code**. Each product or service uses one line item row. If needed, you can add a line item row by clicking **Add Line**.

- The Provider is linked to a Department (see the **Departments** chapter for more information). Each invoice line item will be associated with the Department of the Primary Provider selected. This can be adjusted from the **Department** field of each line item.

- DVMAX updates the Subtotal, Discount, Taxes, and Total boxes as you complete line items. These boxes are not editable. For more information, see **Payment Information**.

- Enter payment information in the **Pay Method** area. If you are using DVMAX's integrated credit and debit card processing function to process a credit or debit card payment, you can refer to the **Credit Card Processing** chapter for more information on working with these types of transactions.

- Type any notes you need in the **Notes** field. The text that is initially in the field comes from **System Constants** (see **System Constants that Affect Invoicing** for details). You can edit this text as needed.

- If a line item requires a prescription label, click the **Rx Label** button while your cursor is in the line item and complete the label details. See **Prescriptions** for

more information.

Create a New Invoice from a Client Record

To create a new invoice from a client record:

- From the **Patient List** on the client record, click the patient you want to link to this invoice. Note that you can choose to add additional patients to the invoice as you build it. If you have not yet created a record for this patient, you can create one from the invoice.

- Choose **Create an Invoice** from the **Client** drop-down menu on the DVMAX main window.
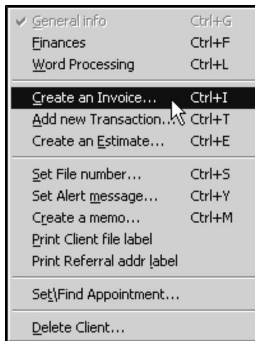
- If you are asked, select a provider from the drop-down list in the **Select a Primary Provider** window. The provider you choose will be the default doctor on all lines of the invoice. This can be changed on the invoice line item using the **Staff** drop down.
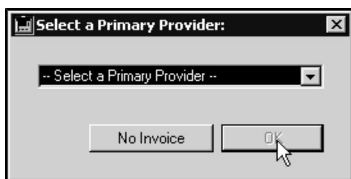
ℹ️ If this client has an unfinished invoice on file, DVMAX will ask you if you wish to work on the unfinished invoice. Click **New Invoice** to create a new invoice. For more information on working with unfinished invoices, see **Working With Unfinished Invoices**.

Creating a New Invoice from a Patient Record

To create a new invoice from a patient record:

- From the **Patient** drop-down menu on the DVMAX main window, choose **Create an Invoice**
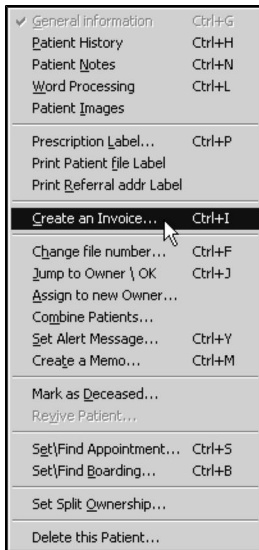
- If you are asked, select a provider from the drop-down list in the **Select a Primary Provider** window. The provider you choose will be the default provider on all lines of the invoice. This can be changed on the invoice line item using the **Staff** drop down.
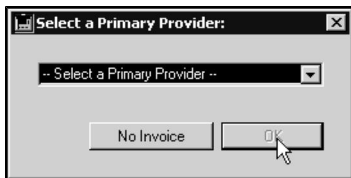
ⓘ If this patient is listed on an unfinished invoice, or if the patient's owner has an unfinished invoice on file, DVMAX will ask you if you wish to work on the unfinished invoice. Click **StartNew** to create a new invoice. For more information on working with unfinished invoices, see **Working With Unfinished Invoices**.

Finding the Client or Patient to Invoice

The process of creating an invoice is almost identical to creating a new estimate or writing a return. The first step in creating a new invoice is to access the appropriate client or patient. To access a client or patient:

- Choose **Clients and Patients** from the **Section** drop-down menu.
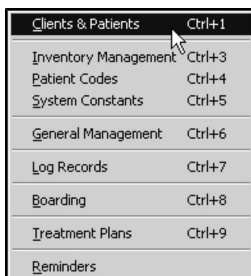
- The **Findwindow** opens. Use the **Find** window to locate the Client or Patient for this invoice. For more information on finding Clients and Patients, see the relevant section of this documentation.

ℹ️ Holding down the ALT key (OPTION on Macintosh) while clicking the Search button on the Find window will take you directly to an invoice window for the client or patient you are searching for. If the client or patient has an unfinished invoice, that invoice will be opened for you to complete. Otherwise, a new invoice will be created. If your search results in a selection of clients or patients, DVMAX will show you an invoice window after you select one of the possible matches.

Invoice Data Entry Details

Line Items and Invoices

Each different type of product or service being sold on the invoice must be recorded as a line item. If you sell multiples of an item, that sale is a single line item. For example, if you are selling 2 cans of dog food and one can of cat food, 2 line items will be on the invoice: one for the dog food and one for the cat food.

ℹ️ You can use TAB to move forward between fields in line item rows. You can use SHIFT+TAB to move backward between fields in line item rows.

Completing the Line Item Fields on an Invoice

To complete a line item:

- Type the quantity you are selling into the **Qty** box.

- Type a different date in the **Date** field if needed. The default format for all dates in DVMAX is MM/DD/YYYY.

ℹ️ If you cannot type directly into the Date field, double-click it to show the **Edit Line Item** window and change the date there (see The Edit Line Item window). The **Line Item Dates Enterable** System Constant controls whether you can type in the **Date** box in the line item itself. See **System Constants That Affect Invoicing** for details.

- You can credit a staff person other than the Primary Provider with the sale of the item on this line. To do this, click the triangle in the **Staff** field and choose a different staff person from the drop-down list that appears.

ℹ If a Bill Item (the code that you type in the **Code** field) has an associated Default Doctor, the Bill Item's Default Doctor will automatically override your choice in the **Staff** field.

- DVMAX allows more than one patient of the same client to appear on an invoice. You can change the patient for a line item by clicking the triangle in the **Patient** field and selecting a different patient from the drop-down list that appears.

- Type the code of the item being sold in the **Code** field. The Description field will fill in automatically and is usually not editable. The Price field is also usually entered for you. The Extended Price (Ext) and Tax (Tx) field will always be filled in automatically.

ℹ If you know the start of the code or description, type as much as you are sure of into the **Code** field and then press TAB to display a list of codes that match what you typed. If you know the complete code for the item, type it into the **Code** field.
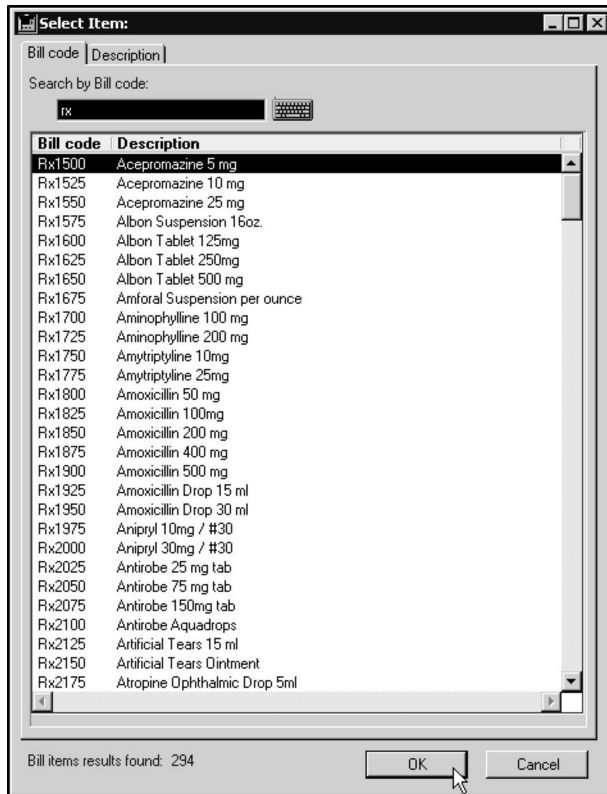
ℹ Some codes have descriptions that you can or must edit. If you enter this kind of code, DVMAX will play an alert sound and move the cursor to the **Description** field. Some codes

have prices that you can supply or change. If you type this kind of code, DVMAX will play an alert sound and move the cursor to the **Price** field.

- If you are using the Departments feature in DVMAX, each Provider will be linked to a Department (see the **Departments** chapter for more information). Each invoice line item will be associated with the Department of the Primary Provider selected. This can be adjusted from the drop-down list in the **Department** field of each line item.

- Indicate whether this item is being **Dispensed** or **Administered** by choosing from the **Disp/Admin** drop-down list.

- If an item is being dispensed, all pricing calculations as set out in the Bill Item record are performed and recorded on the invoice. If an item is being administered, then only the item's Net Price plus its Administration fee are recorded on the invoice. See **Bill Items** for more information.

Typically, you will dispense a drug once and administer it multiple times through the course of treatment.

The <Enter> key is NOT a synonym for the <TAB> key, or the <Return> key. DVMAX has a built-in feature (from 4D) where the <Enter> key is used for one specific purpose - accepting a record that's being displayed in an input form. The <Enter> key is like clicking **Save** or **OK** on a form. Because this is a built-in feature of 4D, using the Enter key in the wrong context (as in, when entering a partial code in a line item) can cause odd results. If you want to move from field to field, use the <TAB> key.

Adding New Empty Line Items to an Invoice

A setting in System Constants controls the number of line items on an invoice. If the default number of line items is insufficient for your invoice:

- Click the **Add Line** button. A new line item will be created, and your cursor placed in its **Qty** field.

For information on setting the default number of line items on an invoice, see **System Constants That Affect Invoicing**.

Removing Empty Line Items from an Invoice

If there are more line items on an invoice than you need, DVMAX will automatically remove them when the invoice is printed. Empty line items do not appear on printed invoices. However,

if you choose, you can select a line and click **Delete Line**. See **Deleting a Line Item from an Invoice** for information on removing non-empty line items.

Editing a Line Item on an Invoice

To edit a line item on an invoice, click in the field you wish to edit and type the new value. Note that some fields are not editable (Tx and Ext. Price) and that others are not editable most of the time (Description and Price). Fields that are dependent on the value you change will update automatically when you enter your new value.

You can also edit a line item using the **Edit Line Item** option. For more information, see **The Edit Line Item Window**.

Deleting a Line Item from an Invoice

To delete a line item from an invoice:

- Click to select the line item you wish to delete. The line will be highlighted or the cursor will appear in that line.

- Click **Delete Line**.

- Where applicable, click **OK** to confirm you wish to delete the line item. You will only see this Confirm dialog if you have enabled the special setting in DVMAX. For information on this setting, contact DVMAX technical support.
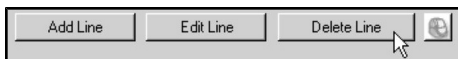
⚠️ You can specify that line item deletions be logged by using the **Audit Invoice Line Item Deletions** setting in **System Constants**. See **System Constants That Affect Invoicing** for more information.

Expand and Sort Invoice Line Items

The Expand and Sort option lets you easily move line items around on an existing invoice. This is particularly useful on large invoices, because the Expand and Sort feature gives you a larger invoice window with which to work.

To use the Expand and Sort feature, click the **Expand and Sort** button. When clicked, it opens a larger window on the line items and you can drag the items as you like. You can also use the column headings in the expanded window to sort the invoice according to the selected heading. Click **OK** to save the changes to the sort order, or click **Cancel** to revert the changes.

The Edit Line Item Details Window

The **Edit Line Item Details Window** allows you to make changes that apply to a single line item on an invoice. You must use the **Edit Line Item Details Window** to apply a discount to a single line item, to delete a line item, or to change the patient on a single line item.
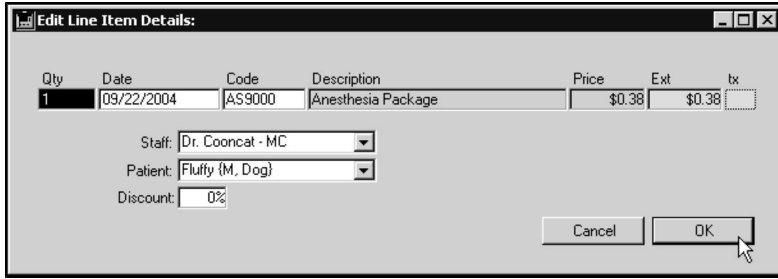
To open the **Edit Line Item Details** window.

- Click once in the **Qty** field of the line item you wish to modify, then click the **Edit Line** button.
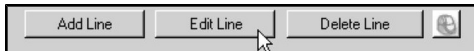
- The fields on this window function identically to their counterparts on the main Invoice dialog. See **Line Items** or more information.

Changing the Patient on an Invoice Line Item

To change the Patient for a line item:

- Choose the new Patient from the **Patient** drop-down list.
- Click **OK** to save your changes.

Saving and Posting an Invoice (Finishing an Invoice)

To post an invoice:

If the invoice is complete, select the **Finished** checkbox in lower left of the Invoice dialog. Selecting **Finished** will post the invoice. If you need to add more information to this invoice in the future, do not select **Finished**. This makes the invoice an **Unfinished Invoice**. See **Working With Unfinished Invoices** for more information.

ℹ️ Posting the invoice records the invoice in the client's financial history.

- If you want to print this invoice, select the **Print** checkbox in lower left of the screen. See **System Constants that Affect Invoicing** for information on controlling the number of copies printed.

- Click **OK** to save the invoice into the DVMAX system and print the invoice (provided **Print** has been selected). DVMAX will return you to the screen you were on when you created the invoice.

-OR-

- Click **OK and Next** to post (and possibly print) the invoice.

If an invoice is marked as **Finished** when you click **OK** or **OK and Next**, line items from the invoice are transferred to the Patient History. If the invoice is not marked as **Finished**, the Patient History may or may not be updated, depending on the **Post History and & Discharge Notes From Unfinished Invoices** setting in System Constants. See **Invoices and Patient** Histories and **System Constants That Affect Invoicing** for more information.

ⓘ DVMAX may require you to enter your staff code before allowing you to finish the invoice.
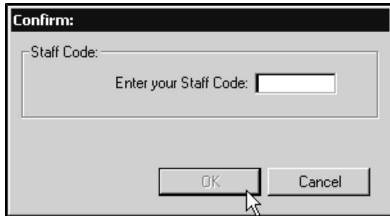
ⓘ If DVMAX asks you for your staff code, you will not be able to finish the invoice without supplying them. The initials you supply must be an existing **Staff Code**. The **User Initials Required to Finish Invoices System Constant** controls whether DVMAX requires initials – see **System Constants That Affect Invoicing** for more information. If this setting is in effect, you will be asked to type your initials every time you OK an invoice with the **Finished** checkbox selected.

Certificate Printing and Invoices

If a line item on an invoice requires that the client receive a certificate, DVMAX will present a **Certificate Printing** dialog when you finish the invoice.
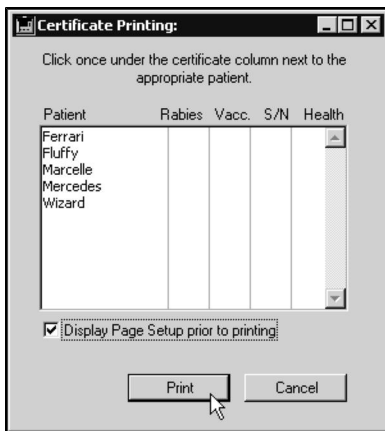
To print the certificate:

- Click once under the appropriate certificate column beside the patient's name to select the certificate you want to print.
- Click **Print**.

Bill Items control whether a line item requires DVMAX to print a certificate. See **Bill Items** for more information.

Controlled Substances Log Entries and Invoices

Some items on an invoice require that you complete a **Controlled Substance LogEntry** when you finish the invoice.

The Bill Item on the invoice and its associated Medical Record Entry control whether a line item requires DVMAX to present the **Controlled Substance** window.

Close Visit(s) When Finishing an Invoice

When an appointment is checked in, DVMAX begins a Visit record that includes all status changes made to the appointment (see Appointments for more information). A Visit is closed when the **Visit Active** checkbox is deselected from the Visits dialog.

Depending on your DVMAX setup, the Visits dialog may display when you finish an invoice. You can choose to close any visits associated with this invoice by deselecting the appropriate **Visit Active** checkbox. When you deselect the checkbox and click OK to close the Visits dialog, DVMAX will ask you to confirm that you want to close the selected visit(s). Click OK to continue.

Super Items and Invoicing

Some bill item codes are **Super Items**, meaning a group of codes. If the code you type on a line item is a Super Item, DVMAX will ask you to provide quantities and other information about the individual items that make up the Super Item.

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 invoice.

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

Payment Information on an Invoice

You may accept payment using up to two methods of payment on a single invoice. For example, a client may make partial payment with cash and pay the remained by check or credit card. This is why DVMAX displays Pay Method 1 and Pay Method 2 fields on the invoice detail window.

In most cases, only one method of payment per invoice will be needed.

⚠️ If the invoice is for a split-ownership patient, the Payment Information area of the invoice screen will not be available. You must create a payment transaction to enter payment for a split ownership patient.

To add payment information:

- Select a pay method from the **Pay Method 1** drop-down list.

- The full amount owing on the invoice may automatically appear in the first **Amount** field, depending on the **Suppress Auto-Entry of Payment Amount** System Constant (see **System Constants that Affect Invoicing** for more information). You can edit the contents of the **Amount** field at any time while the invoice is unfinished.

- The **Pay Notes** field will fill in automatically when you supply a pay method. You can edit the Pay Notes if necessary and your changes will appear on the printed invoice.

- Repeat the steps above for **Pay Method 2** if necessary.

- The combined total of the values in the Pay Method 1 and the Pay Method 2 fields will appear in the Payments field.

Type CONTROL+P (COMMAND+P on Macintosh) to jump to the payments area from any other part of the invoice. This will bring you to the first payment method field.

Balances and Totals on an Invoice

The fields to the right of the **Payment Information** fields show you the financial totals for the invoice.

Adding line items to an invoice updates these fields:

- **Subtotal:** The total cost of all the line items on this invoice, before taxes and discounts.

- **Discount:** The total of all discounts on this invoice. Discounts can be applied to any or all line items. For more information on discounts, see **Discounts**.

- **Taxes:** Contains the total of all taxes on items sold on this invoice. Tax rates are set in System Constants. See **System Constants That Affect Invoicing** for

more information. Whether an individual line item is taxable is determined in the setup for that item. See the **Bill Items** chapter for more information.

- **Total:** The subtotal minus the discount, with taxes added.

- **Previous Balance:** The amount owed by this client from any previous invoices.

- **Payments:** The total payments received on this invoice (the sum of the two **Amt** fields).

- **New Balance: T**he amount owed by this client on all invoices. The New Balance is the sum of the Total and Previous Balance minus Payments.

Discounts on an Invoice

You can apply a discount to any or all line items on an invoice. Line items that have a discount applied are marked with an asterisk (*) following their description.

If a client has a Default Discount, DVMAX will automatically discount line items on an invoice for this client. You can override this default discount. For more information on Default Discounts for clients, see the relevant chapter of this manual.

Applying a Discount to All Line Items

To apply a discount to all line items:

- Choose **Discount** from the **Invoice** menu on the DVMAX main screen.
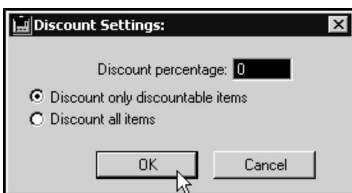
- The **Discount Settings** window opens.

- Type a percentage in the **Discount Percentage** field. DVMAX will discount the price of all items on the invoice the percentage you specify here.

- Select the **Discount All Items** radio button to apply the discount to all items on the invoice.

-OR-

- Select the **Discount Only Discountable Items** radio button to have DVMAX apply the discount only to items marked as discountable. For more information on the difference between these settings, see the **Bill Items** chapter of this manual.

- Click **OK** to apply the discount.

⚠️ A setting in System Constants controls the availability of the **Discount All Items** radio button. If the **Discount All Items** radio button is not available, you will not be able to apply a discount to line items that are not specified as discountable in their Bill Item setup. For more information, see the Bill Items chapter of this manual, and **System Constants that Affect Invoicing**.

Applying a Discount to a Single Line Item

To apply a discount to a single line item:

- Select the line item you wish to discount, then click the **Edit Line** button. The **Edit Line Item Window** appears.

- Type the percentage of the discount in the **Discount** field.
- Click **OK** to save your changes.

⚠️ Not all items are discountable. For more information on discountable items, see Bill Items.

Adding a New Patient from an Invoice

You can add a new patient to DVMAX while working on an invoice. The new patient's owner will be the client for whom you are creating an invoice. This process will also create a new patient record. To add a new patient from the invoice window:

- Select **Add New Patient** from the **Invoice** drop-down menu.

- The **Quick Entry for New Patient** dialog opens.

- Fill out at least one of the **Name, Species, Breed, DOB, Weight** and **Sex** fields of the **Quick Entry** dialog. For information on filling out new patient records, see **Patients**.
- Click **OK**. The patient is added to DVMAX and is available on the invoice.

Backdating an Invoice

You can backdate an invoice by typing a date from the past into the **Date** field in the upper left of the invoice window.

⚠️ The ability to backdate an invoice is controlled by the **Prevent Back-Dating of Invoices and Transactions** System Constant. If this setting is selected, DVMAX will not allow invoices to be backdated. See System Constants That Affect Invoicing for details.

Backdating an invoice in this way can have one of two effects on the Receivable Aging Date for this invoice. DVMAX can either:

- Backdate the Receivable Aging Date to match the new date on the invoice
- Leave the Receivable Aging Date at its default value of the current date.

When backdating an invoice, you must tell DVMAX which of these two options is applicable to the Receivable Aging Date.

The backdated date of the invoice becomes the default for all new line items on this invoice. It also becomes the date of any entries placed on the Patient History by this invoice.

⚠️ The **Receivable Aging Date** is the date the amount on the invoice is charged to your client. A client has a certain number of days from the Receivable Aging Date in which to pay the unpaid balance on an invoice in full, after which interest charges will apply.

To backdate an invoice:

- Type a date into the **Date** field in the upper left of the invoice screen. The default format for all dates in DVMAX is MM/DD/YYYY.
- Press the **Enter** key. DVMAX will ask you to confirm the new Invoice date.
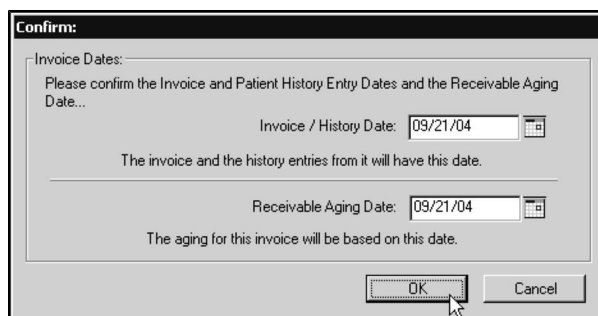
- Confirm that the **Invoice/History** date is the date you typed into the **Date** field. Correct or modify the date if necessary by typing a new date in the **Invoice/History Date** field.
- Confirm that the **Receivable Aging Date** is correct. If it is not, type the right date into the **Receivable Aging Date** field.

⚠ The default date in the **Receivable Aging Date** field will be either the current date or the backdated date you typed in this invoice's **Date** field. The default date in the **Receivable Aging Date** field is determined by a setting in System Constants – see **Receivables Aging Options for Backdated Invoices** in **System Constants That Affect Invoicing** for more information.

- Click **OK** to backdate this invoice and return to the invoice dialog.

-OR-

- Click **Cancel** to leave the invoice date unchanged and return to the invoice dialog.

- When an invoice has been backdated, an **Aging Date** field will appear on the invoice window, immediately to the right of the **Date** field.

Over-the-Counter Invoices (OTC)

Typically, you will use DVMAX to invoice for products and services related to a specific patient or client. In the case of over-the-counter or walk-in retail sales, however, there will be no client or patient in DVMAX with which to associate the sale. DVMAX's Over-the-Counter (OTC) invoicing feature allows you to quickly write an invoice at the point of sale, letting you keep track of inventory.

In order to use the OTC invoicing feature, the following conditions must be met:

- You must receive immediate, full payment for all items on an OTC invoice. DVMAX does not allow OTC invoices to carry outstanding balances.

- The OTC invoice must be started and finished in one session. You cannot save an OTC invoice to finish later.

- Only staff identified as doctors may sell prescription items on an OTC invoice.

Creating an Over-the-Counter Invoice

To create an OTC invoice:

- Click **OTC Invoice** from the Window List.

-OR-

- From the **Special** drop-down menu on the DVMAX main window, click **Write anOTC Invoice**.
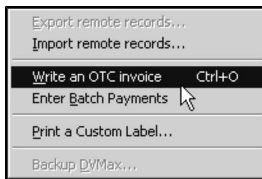
ⓘ CONTROL+O (COMMAND+O on Macintosh) is a keyboard shortcut for **Write an OTC Invoice**.

Filling Out an Over-the-Counter Invoice

There are several steps involved in creating an OTC invoice. The exact sequence depends on your DVMAX configuration and the particular items that will appear on the invoice. The steps below are a general overview. For more information on each step, see **Invoice Data Entry Details**.

- The current date will be in the **Date** field. Type a different date in the date field if needed. The default format for all dates in DVMAX is MM/DD/YYYY. Changing the date here will change the date for all empty line items on this invoice.

- Type the details of the product or service you are selling in a Line Item row. Include the **Quantity** of the item sold, **Date** (if different from the current date), **Staff** (if different from the current staff), and **Item Code**. Each product or service uses one line item row. To add a line item row, click the **Add Line** button.

- The Subtotal, Discount, Taxes, and Total boxes are updated automatically as you complete line items. These boxes are not editable. For more information, see the **Payment Information** section of this chapter.

- Type payment information in the **Pay Method** area.

⚠ You must receive immediate, full payment for all items on an OTC invoice. DVMAX does not allow OTC invoices to carry outstanding balances.

- Type any notes you need in the **Notes** field. The text that is initially in the field comes from System Constants (see **System Constants that Affect Invoicing** for details). You can edit this text as needed.

- If a line item requires a prescription label, click the **Rx Label** button while your cursor is in the line item and complete the label details. See **Prescriptions** for more information.
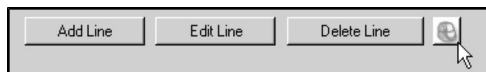
Saving (Posting) an Over-the-Counter-Invoice

To post the OTC invoice:

- If you wish to print the invoice, make sure to select **Print**.

- Click **OK** to post the invoice into the DVMAX system and print the invoice (provided Print has been selected).

-OR-

- Click **OK and Next** to post and print the invoice and open a new OTC invoice.

ℹ See **System Constants that Affect Invoicing** for information on controlling the number of copies printed.

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 reverse of updating the patient's history with items

entered on an Invoice (see the **Invoices and Patient Histories** for more information on this).

Invisible Invoicing works by monitoring changes you make to a patient's record. When you first open a patient record, DVMAX can create an invoice in the background. This is the "invisible invoice." When you add a billable item to the patient record, 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.

You will typically use Invisible Invoicing in a paperless office, where all information goes directly into the patient record and DVMAX generates billing from those entries.

Automatic Invisible Invoicing

DVMAX usually starts an invisible invoice automatically when you open the Patient History screen, although you may also set DVMAX to start an invisible invoice only when you tell it to. Only one invisible invoice per patient, per terminal, can be active at any one time.

With the **Automatic Invisible Invoice** setting turned on, DVMAX will open an invisible invoice window every time you open a Patient's history screen.

See the **System Constants That Affect Invoicing** section of this chapter for instructions on how to turn on the **Automatic Invisible Invoice** setting.

ⓘ 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.

Manually Start an Invisible Invoice

DVMAX usually starts an invisible invoice automatically when you open the Patient History screen, although you may also set DVMAX to start an invisible invoice only when you tell it to. Only one invisible invoice per patient, per terminal, can be active at any one time.

If Invisible Invoicing is not running automatically, you can choose to manually start an invisible invoice. To manually start an Invisible Invoice:

- From the Patient record, choose **Start Invisible Invoice** from the **History** menu.
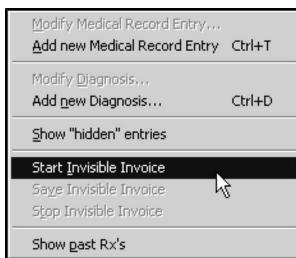
Invisible Invoices and Unfinished Invoices

If DVMAX opens an invisible invoice for a patient who has an unfinished invoice, that unfinished invoice will become the invisible invoice. That is, DVMAX will add any billable items

you add to the Patient history to the existing unfinished invoice rather than start a new invoice for this patient.

For information on unfinished invoices, see **Working With Unfinished Invoices**.

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. The Patient and Client are also listed.
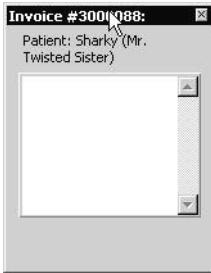
DVMAX is ready to record the changes you make on the Patient History screen to the Invisible Invoice.

Working with Invisible Invoices

As its name implies, you do not work directly with an Invisible Invoice. Rather, DVMAX works in the background, adding line items to the Invisible Invoice as you add Medical Record Entries to a Patient History. DVMAX updates the Invisible Invoice window simultaneously with the Patient History. Each of the items in this Invisible Invoice window will become a line item on the finished invoice.

Saving an Invisible Invoice

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

If Invisible Invoicing is not running automatically, you can choose to save an Invisible Invoice at any time from the **History** tab of the Patient record. You cannot perform this function when automatic invisible invoicing with Guaranteed Charge Capture is enabled.

To save an Invisible Invoice without exiting patient History:

- Choose **Save Invisible Invoice** from the **History** drop-down menu.
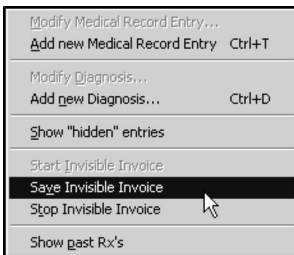
- You will see the message "Closing and Saving" appear as the Invisible Invoice window's status message. When the Invisible Invoice window disappears, the

Invisible Invoice has been successfully saved as an unfinished invoice on the client's Finances screen. 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 (finish/post) the unfinished invoice and actually bill the client. You cannot use Save Invisible Invoice when automatic invisible invoicing with Guaranteed Charge Capture is enabled.

See **Working With Unfinished Invoices** for more information.

Canceling an Invisible Invoice

If Invisible Invoicing is not running automatically, you can choose to stop or cancel an Invisible Invoice from the **History** tab of the Patient record. You **cannot** perform this function when automatic invisible invoicing with Guaranteed Charge Capture is enabled.

To cancel an Invisible Invoice:

- From the Patient record, choose **Stop Invisible Invoice** from the **History** menu.
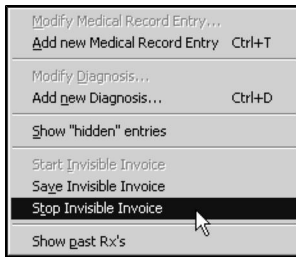
- DVMAX will ask you to confirm that you wish to cancel the Invisible Invoice.
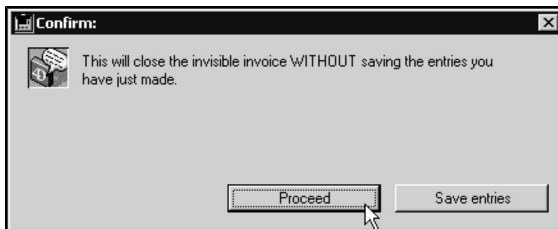
- Click **Proceed** to cancel the Invisible Invoice without saving any changes you have made since the last time the Invisible Invoice was started.

–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**).

⚠ You cannot stop an invoice when **Guaranteed Charge Capture** is enabled. See **Guaranteed Charge Capture**.

Guaranteed Charge Capture

Guaranteed Charge Capture prevents users from disabling or stopping invisible invoicing. This ensures that all patient treatments and sales are "captured" on the invisible invoice.

This feature ensures that:

- Automatic invisible invoicing is on
- Disables the menu items that can stop the invisible invoice
- Disables the "No" option when starting the invisible invoice

To enable Guaranteed Charge Capture:

- Select **System Constant** form the **Section** menu.
- Select the **Invoice Settings** tab.
- Click the **Automatic Invisible Invoicing** checkbox.
- A confirm dialog appears asking, "Would you like to enable DVMAX **Guaranteed Charge Capture**?"
- Select **Yes** to enable the **Guaranteed Charge Capture**.
- Select **OK** to confirm the changes and move out of **System Constants**.

Working With Unfinished Invoices

Most often, you will start and finish an invoice in one. You will enter all the data, receive payment, print and post it before doing anything else in DVMAX. However, in some cases you will leave the invoice unfinished so you can add to it later. For example, you can use an unfinished invoice to track the treatment of a patient hospitalized for several days or weeks.

DVMAX allows you to add items to an unfinished invoice as necessary; the procedure is identical to that outlined in the **Creating a New Invoice** section of this chapter.

An unfinished invoice is exactly like a new invoice, with the following exceptions:

- DVMAX does not post an unfinished invoice to a client's financial history until the invoice is marked as finished.
- DVMAX does not update sales histories until the invoice is marked as finished.
- Patient Histories **may** not be updated until the invoice is marked as finished, depending on the **Post History and & Discharge Notes From Unfinished Invoices** setting in System Constants. See **System Constants That Affect Invoicing** for more information.

Finding Clients with Unfinished Invoices

To get a list of clients with unfinished invoices:

- From the **Section** drop-down menu on the DVMAX main window, click **Clients and Patients**. The **Find** window opens.

- Select **Clients** from the **Search For:** drop-down menu.

- Select **Unfinished Invoices (no input)** from the **By** drop-down menu.
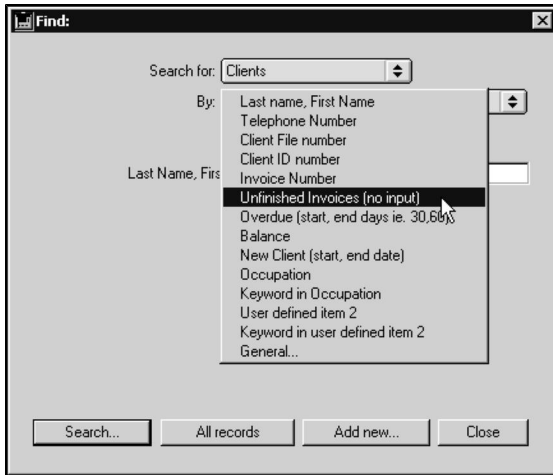
- Click **Search.** A list of clients with unfinished invoices appears. Double-click the client with the unfinished invoice you want to edit.

For information on how to print a report of unfinished invoices, see the **Financial Reports**.

Finding a Client's Unfinished Invoices

DVMAX lists a client's unfinished invoices on the Finances tab of the Client record. To see a list of unfinished invoices for a client:

- From the **Section** drop-down menu on the DVMAX main window, click **Clients and Patients**. The **Findwindow** opens.

- Select **Clients** from the **Search For:** drop-down menu.

- Select **Unfinished Invoices (no input)** from the **By** drop-down menu.
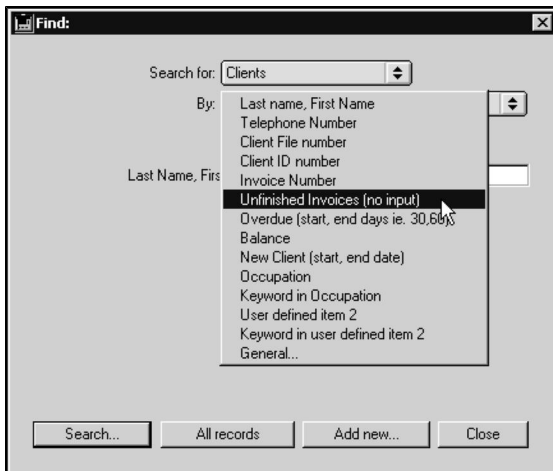
- Click **Search.** A list of clients with unfinished invoices appears.

- Double-click the client whose unfinished invoices you want to see.

- Click the **Finances** tab (to the right of **General Information**) near the top of the screen.
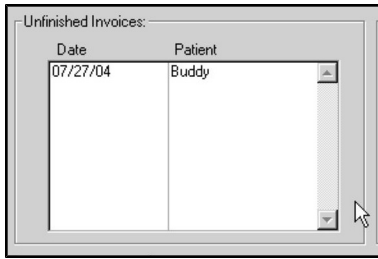
- The client's unfinished invoices are listed in the upper left of the **Finances** tab of the Client record. The date and Primary Patient on the invoice are listed.

Finding Unfinished Remote Invoices

Unfinished remote invoices are unfinished invoices created by a remote terminal (See **DVMAX-Sync**). It is not possible to finish invoices on a remote terminal. You can search for Unfinished Remote Invoices and then finish the invoices in the same manner as any other unfinished invoice, provided you are not working from a remote station. You can also use the Batch Finish Unfinished Invoices option to finish a selected group of invoices at one time.

To find unfinished remote invoices:

- From the **Section** drop-down menu on the DVMAX main window, click **Clients and Patients**. The **Find** window opens.
- Select **Clients** or **Patients** from the **Search For** drop-down menu.
- If you chose **Clients**, select **Unfinished Invoices (no input)** from the **By** drop-down menu, then select **From Remote Stations Only** to generate a list of unfinished invoices from remote stations. If you chose **Patients**, select **Unfinished Remote Invoices (no input)** from the **By** drop-down menu.
- Click **Search.** A list of clients or patients with unfinished invoices created at remote terminals displays.

Batch Finish Unfinished Invoices

You can use the **Batch Finish Unfinished Invoices** function from the **Patients** drop-down menu on the **Patients** listing to finish a set of unfinished invoices. This is particularly useful for invoices created on remote terminals, since those types of invoices cannot be finished in the field.

- From the **Section** drop-down menu on the DVMAX main window, click **Clients and Patients**. The **Find** window opens.
- Select **Patients** from the **Search For** drop-down menu.
- Select **Unfinished Remote Invoices (no input)** from the **By** drop-down menu.
- Click **Search**. This produces a list of patients with unfinished invoices.

- From the Patient menu, select **Batch Finish Unfinished Invoices** option to finish the invoices.

Opening an Unfinished Invoice

Typically, DVMAX will prompt you to open an unfinished invoice. You can also open an unfinished invoice directly from the Client Finances tab.

Opening an Unfinished Invoice from the Client Finances Tab

DVMAX lists a client's unfinished invoices in the upper left corner of the Client Finances tab. To see a list of a client's unfinished invoices, follow the steps outlined in the **Listing a Client's Unfinished Invoices** section of this chapter.

When you can see the list of a client's unfinished invoices, follow these steps to open one:

- Click in the list of unfinished invoices to select the invoice you wish to edit

- Choose **View Unfinished Invoice** from the **Finances** menu on the main DVMAX screen.
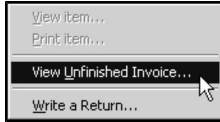
- The selected invoice opens and is ready to be edited.

Opening an Unfinished Invoice from the Client Record

If a client has an unfinished invoice, DVMAX will ask you if you want to open the unfinished invoice when you either:

- Open the Client record

- Choose **Create an Invoice** from the **Client** drop-down menu while viewing the client record.

To open an unfinished invoice when opening the client record:

- Click **Reopen** when asked if you want to reopen the unfinished invoice.
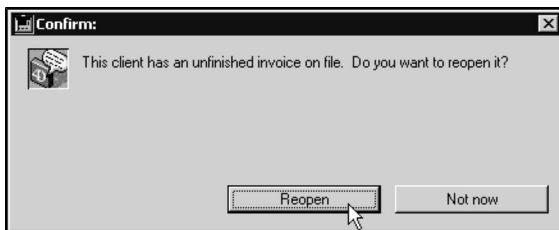
To open an unfinished invoice after choosing **Create an Invoice** from the **Client** drop-down menu:

- Click **Reopen** when asked if you want to reopen the unfinished invoice.
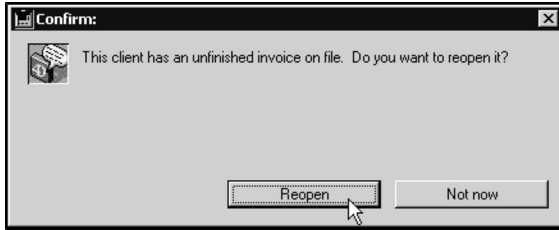
-OR-

- If a client has more than one unfinished invoice, DVMAX will ask you to choose which you want to reopen.
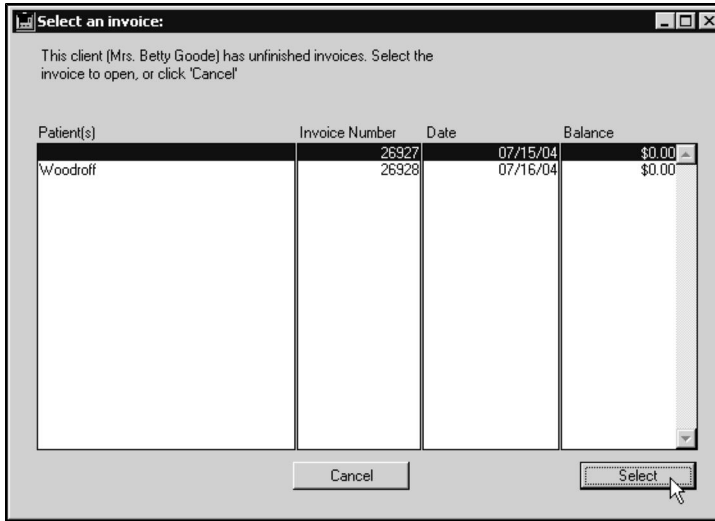
- Click the unfinished invoice you want to open from the list, then click **Select**.

Opening an Unfinished Invoice from the Patient Record

If a patient's owner (a client) has an unfinished invoice, DVMAX will ask you if you want to open the unfinished invoice when you create an invoice from that patient's tab.

To access an unfinished invoice from the Patient record:

- Choose **Create an Invoice** from the Patient menu.
- DVMAX will ask you if you want to open this patient's unfinished invoice, or, in the case that this patient has more than one unfinished invoice, to select an unfinished invoice to edit.
- If this patient's owner (the client) has an unfinished invoice containing another patient, DVMAX will ask you if you wish you add this patient to the existing unfinished invoice. To add this patient to the unfinished invoice, click **Add Patient**.

Deleting an Unfinished Invoice

To delete an unfinished invoice:

- Open the unfinished invoice by following the steps outlined in **Opening an Unfinished Invoice**.

- Choose **Delete Unfinished Invoice** from the **Invoice** menu on the DVMAX main screen.

Discount...
Edit this invoice...
Delete unfinished invoice...
Void this invoice...
Add a new patient...
Prescription label...   Ctrl+R
Get Client Info   Ctrl+I
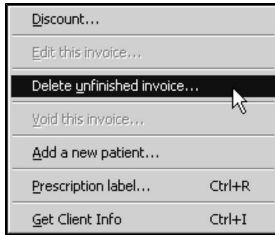
- DVMAX will ask you to confirm that you want to delete the unfinished invoice. Click **Yes**.

Confirm

Are you sure you want to completely delete this unfinished invoice?

[Yes]   [No]
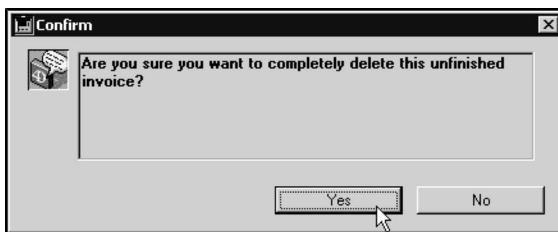
- DVMAX records the deletion of the unfinished invoice on the Finances tab of the client record. It is listed as a Bill for $0.00, with the comment "For cancelled open invoice #x", where x is the number of the deleted invoice.

- Line items from deleted unfinished invoices are moved to its discharge notes area. To see the line items that were on the deleted unfinished invoice, double-click the deleted invoice on the Client Finances tab.

⚠ DVMAX does not permit you to void an unfinished invoice that contains payments made using DVMAX's integrated credit and debit card feature. For more on the credit and debit card transactions, see **Credit and Debit Card Processing**.

⚠ Deleting an unfinished invoice does **not** remove any changes to the patient's history made by your work on the invoice in previous sessions. If you wish to remove these entries, you must do so from the Patient History tab.

Editing, Correcting or Voiding Finished Invoices

You can edit a finished invoice if you need to correct an error you made while creating it. You can also void or cancel a finished invoice if the entire invoice is unnecessary or incorrect, provided it does not contain a payment made through DVMAX's integrated credit and debit card processing feature.

⚠ Editing or correcting a finished invoice can have unintended consequences on your practice's financial records. If you are uncertain how to correct an error on a finished invoice, or if you are uncertain of the effects your correction might have on your financial records, please con-

tact DVMAX Technical Support before proceeding. Editing finished invoices is often not the best solution to the problem you may be having.

When you choose to edit an invoice, DVMAX actually duplicates the invoice you wish to edit and reverses the original. Editing or voiding finished invoices is one of two methods DVMAX provides you with to make adjustments to your financial records.

⚠️ You cannot void a finished invoice for a split ownership patient.

Editing or Correcting a Finished Invoice

To edit a finished invoice:

- Locate the client for the invoice.
- Locate the invoice you wish to edit on the Finances tab of the Client record.
- Double-click the invoice you wish to edit.
- Choose **Edit This Invoice** from the **Invoice** drop down menu.
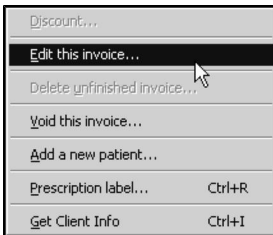
ℹ️ The **Edit this Invoice** menu item is disabled if you are working on an invoice that is already in the process of being edited.

- DVMAX will ask you to confirm that you wish to edit the invoice. If this invoice is for a split ownership patient, DVMAX will display another confirm dialog to this effect.
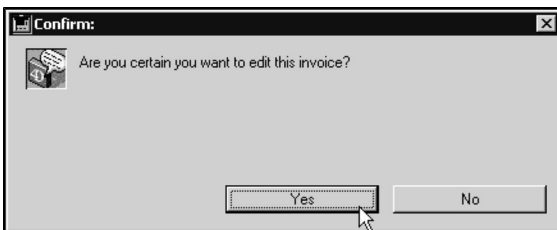
- Click **Yes**.
- DVMAX will ask you to confirm again that you wish to edit the invoice.
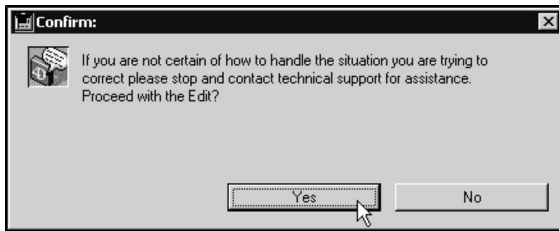
- Click **Yes**.
- DVMAX may ask you if you wish to keep any payments originally made on this invoice.

- Choose **Keep Pmnt** (Keep Payment) if you have already deposited the payment originally made on this invoice. Choosing **Keep Payment** will reverse the invoice only, not the payment. The payment will stay on the client's account.

⚠ If you choose **Keep Payment**, do not enter the payment again when editing the invoice.

-OR-

- Choose **Enter Again** if you have not deposited the payment originally made on this invoice. Choosing **Enter Again** will reverse both the invoice and the payment.

⚠ If you choose **Enter Again**, make sure to enter the payment again while editing this invoice.

- DVMAX will create a new invoice with the same line items, patient and staff as the original. Make the necessary changes to the invoice. For information on filling out invoices, see **Creating a New Invoice**.
- Click **OK** to save your changes.

Your changes are recorded on the Client Finances tab, creating a "paper trail" that allows you to track altered transactions.

Voiding an Invoice

If an entire invoice is incorrect or unnecessary, you may void or cancel the invoice. When you void an invoice, DVMAX creates an Edit Credit on the Client Finances tab to 'zero' the balance due for the line items on that invoice. DVMAX also creates an Edit Charge on the Client Finances tab to remove any payment(s) made on the voided invoice. DVMAX also stores a note as to the date the void was performed.

⚠ Depending on your payment provider, DVMAX may not permit you to void an invoice that contains payments made using DVMAX's credit and debit card processing feature. For more on the credit and debit card transactions, see **Credit and Debit Card Processing**.

To void an invoice:

- Locate the client for the invoice.

- Locate the invoice you wish to void on the Client Finances tab.

- Double-click the invoice you wish to void.

- Choose **Void This Invoice** from the **Invoice** menu on the DVMAX main screen.

Discount...
Edit this invoice...
Delete unfinished invoice...
Void this invoice...
Add a new patient...
Prescription label...   Ctrl+R
Get Client Info   Ctrl+I

- DVMAX will ask you to confirm that you wish to void this invoice.

Confirm:
Are you certain you want to void out this invoice?

Yes   No
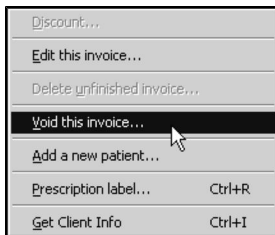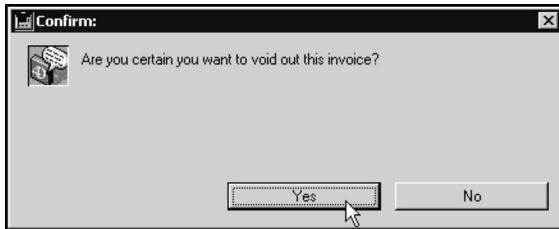
- Click **Yes**. DVMAX voids the invoice and returns you to the Client Finances tab.

⚠ You cannot void a finished invoice for a split ownership patient.

Printing Invoices

DVMAX provides four ways to print invoices:

- You can print an invoice as soon as you have finished creating it.

- You can print an invoice at any time using the **Print** command.

- You can print a finished invoice from the Client Finances tab with the **Print Item** command.

- You can batch print invoices from the **General Management** section.

For information on printing an invoice as soon as you have finished creating it, see **Creating a New Invoice.**

Printing an Invoice Using the Print Command

You can print an invoice at any time by using the **Print** command. To print an invoice using the **Print** command:

- Locate the client for the invoice.
- Locate the invoice you wish to print on the Client Finances tab.
- Double-click the invoice you wish to print.
- Choose **Print** from the **File** drop-down menu on the DVMAX main screen.

```
Change user
Show Window List
Preferences...
Page Setup
Print...
Print Custom Label...
Quit              Ctrl+Q
```
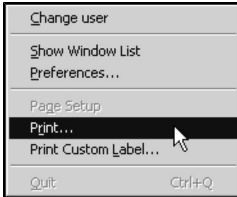
Printing an Invoice with the Print Item Command

To print a finished invoice from the Client Finances tab:

- Locate the client for the invoice.
- On the Client Finances tab, click once to select the invoice you wish to print.
- Choose **Print Item** from the **Finances** drop-down menu.

```
View item...
Print item...
View Unfinished Invoice...
Write a Return...
```
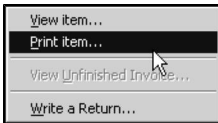
Batch Printing Invoices

You can print any number of invoices at once with **Batch Print Invoices**. You can specify either the date range of invoices or the range of invoice numbers you want to print. To batch print invoices:

- Select **General Management** from the **Section** drop-down menu of the DVMAX main screen.

```
✓ 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
```
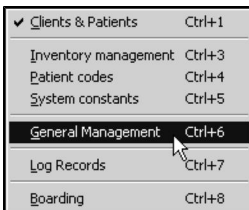
- The **Management Functions** dialog opens. Click the **Financials** tab on the **Management Functions** dialog.
- Click to select the **Batch Print Invoices** radio button.
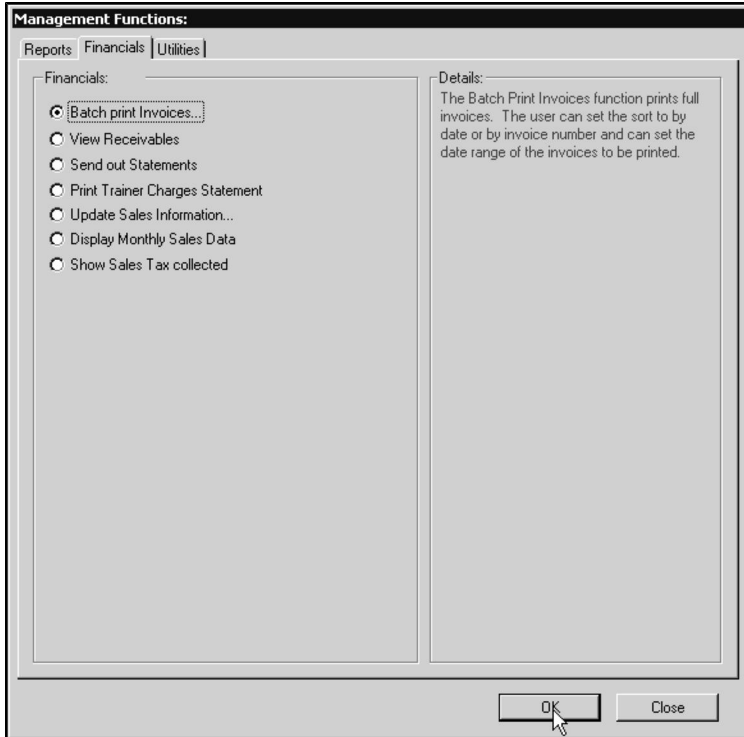
- Click **OK**. The **Batch Print Options** dialog appears.
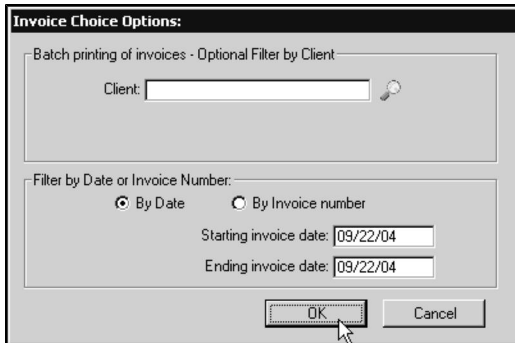
- Click the magnifying glass beside the **Client** field to print invoices from certain clients only. Click to select the **By Date** radio button to print all invoices dated within a certain time period. Type the start date and end date of the time period in the **Starting Invoice Date** and **Ending Invoice Date** fields.

-OR-

- Click to select the **By Invoice Number** radio button if you wish to print a range of invoice numbers. Type the appropriate numbers in the **Starting Invoice Number** and **Ending Invoice Number** fields.

- Click **OK**. DVMAX will tell you how many invoices match your criteria.
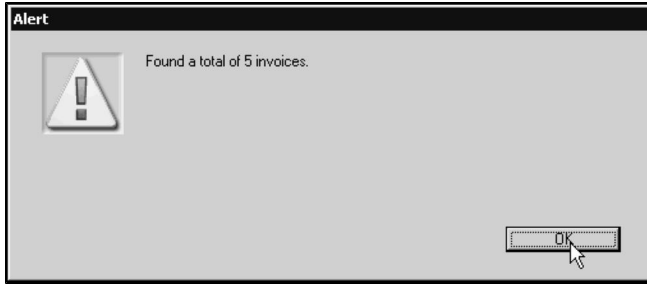
> • Click **OK** to dismiss the message and print the invoices.

⚠️ You can print up to two weeks of invoices in one batch.

About the Printed Invoice

Below is a sample printed invoice. Note that upcoming Reminders are printed at the bottom of the invoice. This can be controlled via the **Print Reminders on Invoices** setting in System Constants. See **System Constants That Affect Invoicing** for more information on printing Reminders on Invoicing.

There are a number of **System Constants** that affect what appears on the printed invoice, including:

> • Discharge Note Separator
>
> • Discount Label
>
> • Include Bill Codes on Printed Invoices and Estimates
>
> • Print Client Phone on Invoices
>
> • Print Practice Heading on Invoices
>
> • Print Reminders on Invoices
>
> • Print Staff Code on Invoice Line Items
>
> • Exclude Previous Balance from Printed Invoice
>
> • Zero/non-zero balance notes

See **System Constants That Affect Invoicing** for details.

Split Ownership, Split Billing and Invoicing

If the patient named on an invoice has two or more owners, charges on that invoice are split according to each client's ownership percentage. DVMAX will alert you when about to invoice a split ownership patient.
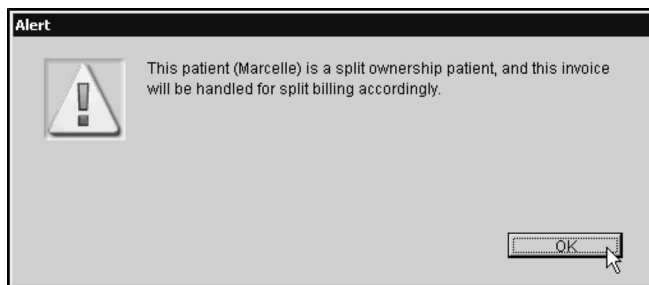
The following considerations apply to a split ownership patient:

1. If the invoice is created from the client record, the invoice will be addressed to the client from whose screen the invoice was created. When the invoice is finished, each owner will have an invoice posted to the client's record. Invoice details will reflect that client's name and percentage of amount billed.

2. If the invoice is created from the patient record, the unfinished invoice will be added to the client record of the owner noted beside the patient name on the Patients list (i.e.; the list of patients displayed when you click the Patients icon).

3. An invoice will be posted to the Finances tab of clients/owners. The entry on the Finances tab will reflect the client's percentage ownership.

4. Invoice balances on client statements are calculated according to each client's percentage ownership of a patient. For example, if Client A owns 60% of a patient, and Client B owns 40%, and an invoice is created for $100, Client A will owe $60 and Client B $40.

5. The Payment Area is unavailable when creating an invoice for a split ownership patient.

⚠ Regular (wholly-owned) and split-ownership patients cannot appear on the same invoice. Further, you cannot add more than one split-ownership patient to an invoice.

⚠ You cannot void a finished invoice for a split ownership patient.

Barn Billing

Barn Billing applies a single invoice to a group of patients. DVMAX will generate an identical invoice for each patient in the group. Barn Billing is used mostly in equine practices.

⚠ We recommend you do not leave barn-billed invoices unfinished.

To barn bill:

- Create an invoice as outlined in **Creating an Invoice**.

- Before clicking **OK** to post or save the invoice, click once to select the **Barn Billing** checkbox.

- Click **OK**. The invoice screen closes, and the **Barn Billing** window displays.
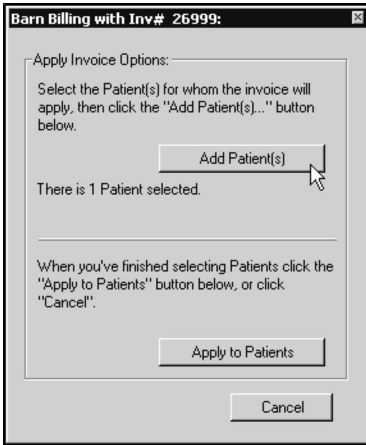
- Perform a standard patient search to produce a list of the patients you wish to add. See **Creating a New Invoice** for details. The **Barn Billing** window will still be visible.

- Click once on the patients you wish to add to highlight them. You can select multiple patients by holding the CONTROL key (COMMAND on Macintosh) while clicking.

- Click **Add Patients** on the **Barn Billing** window. The **Barn Billing** window will update to reflect the number of patients you selected.

- When you have finished adding patients, click **Apply to Patients** on the **Barn Billing** window.
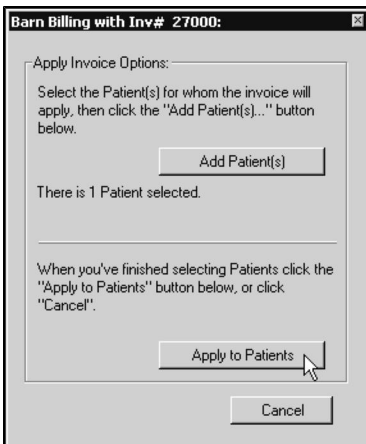
- DVMAX will ask you to confirm that you wish to apply the invoice to this group of patients.
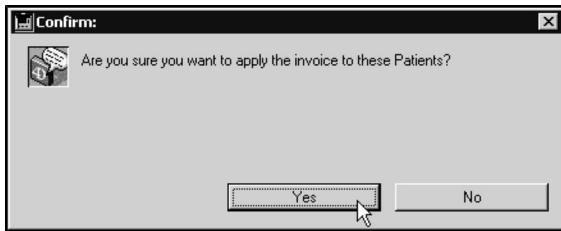
- Click **Yes** to invoice the group of patients.

⚠️ To use Barn Billing, your DVMAX datafile must be labeled **Equine** in **System Constants**.

System Constants That Affect Invoicing

You can control many aspects of DVMAX's invoicing behavior with settings in **System Constants**. Refer to the **System Constants** chapter for more information.

Always Ask for Certificates

If selected, this setting in System Constants will cause the Certificates dialog to appear every time you finish an invoice. This allows for easy Certificate printing after every invoice.

Most often, you will leave this setting unselected because the **Certificates** setting in appropriate Bill Items is a more efficient way to handle certificate printing (for more information, see the **Bill Items** chapter of this manual).

To view or change the **Always Ask for Certificates** setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.
- Select the **Always Ask for Certificates** checkbox to have DVMAX always present you with a Certificate dialog when you finish an invoice.
- Click **OK** to save your setting.
- Click **OK** again to exit System Constants.

Audit Invoice Line Item Deletions

This setting in System Constants controls DVMAX's behavior when deleting line items. If this setting is off, line items when deleted will simply disappear from the invoice. If this setting is on, DVMAX will record the Date, Time, User, Station, Invoice number and line item details in a Deletion Log (you can access the Deletion Log from General Management).

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- Click to select the **Audit Invoice Line Item Deletions** checkbox. Click again to deselect.

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

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

Auto-Display Rx Label Printing Dialog

If this setting in System Constants is checked, DVMAX will automatically display the Prescription Labeling dialog after you enter a prescription item on an invoice line. (The Prescription Labeling dialog allows you to create and print labels for medications.) Selecting this setting eliminates the need to use the Prescription Label button on the invoice screen.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Click to select the **Auto-Display Rx Label Printing Dialog** checkbox. Click again to deselect.

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

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

Automatic Invisible Invoice (System Constants)

This setting in System Constants controls whether DVMAX automatically opens an Invisible Invoice when you open the Patient History tab. For more information, see the **Invisible Invoicing** section of this chapter.

To turn on the **Automatic Invisible Invoice** setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**.

- From the **Processing & Printing** area of the **Invoice Settings** section, select **Automatic Invisible Invoice**.

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

- Click **OK** again to exit System Constants.

Default Doctor (System Constants)

This setting in System Constants controls the Doctor or Provider initially selected in the "Choose a Primary Provider" dialog that appears when you create a new invoice. To view or change the Default Doctor:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**. The System Constants dialog appears.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Default Constants**. Alternatively, click the **Default Constants** tab. The initials of the Default Doctor, if any, are in the Default doctor field. The Doctor's full name and title are immediately to the right of the Default doctor field.

- To change the Default Doctor, first click the Clear Dr. button to the right of the Doctor's name. Now type the new Doctor's initials in the Default doctor field.

ⓘ Press TAB while your cursor is in the empty **Default Doctor** field to choose from a list of Doctors.

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

- Click **OK** again to exit **System Constants**.

Default Invoice Notes (System Constants)

The text in the **Default Invoice Notes** under System Constants is the text that will appear by default in the **Discharge Notes** field on the invoice screen. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Notes**. Alternatively, click the **Invoice Notes** tab.

- Type the text you want in the Discharge Notes of every invoice in the **Default Invoice Note** field.

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

- Click **OK** again to exit System Constants.

Default Line Items on New Invoice (System Constants)

This setting in System Constants determines the number of empty line items that appear on a new invoice. For more information about line items, see **Invoice Data Entry Details** elsewhere in this chapter. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- From Invoice Settings, type the number of empty lines you want on new invoices in the **Default Line Items on New Invoice** field.

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

- Click **OK** again to exit System Constants.

Invisible Invoicing: Always Ask for Doctor (System Constants)

If **Invisible Invoicing: Always Ask for Dr.** is selected in System Constants, then when you switch between patients using the Next/Previous buttons, and there is an invisible invoice running, DVMAX will ask for the Dr. on each switch, and will use that Dr. as the default value for invoice line items, and for MRE entries.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- From the Invoice Settings tab, click to select the **Invisible Invoicing: Always Ask for Dr.** checkbox. Click again to deselect.

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

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

Invisible Invoicing: Disable "No Invoice"

If this setting in System Constants is on, DVMAX will not present a "No Invoice" option when asking for a Primary Provider or other information before opening an invisible invoice. Effectively, this means that any changes to a patient's history will result in an invoice. See **Invisible Invoicing** for more information.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- From Invoice Settings, click to select the **Invisible Invoicing: Disable "No Invoice"** checkbox. Click again to deselect.

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

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

Discharge Note Separator (System Constants)

The Discharge note separator in System Constants holds the text that will appear before each discharge note printed on an invoice. Typically you will use two paragraph returns to space your discharge notes when printed.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Notes**. Alternatively, locate and click the **Invoice Notes** tab.

- From Invoice Notes, type the text you want to appear before each discharge note printed on an invoice into the **Discharge note separator** field.

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

- Click **OK** again to exit the System Constants dialog.

Discount Add-On Fees (System Constants)

This setting in System Constants tells DVMAX whether to apply a discount to the Add-on amount defined for a Bill Item. This gives you the option of always charging the full Add-on for every item, or discounting the add-on fee along with the price of the item itself. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- From Invoice Settings, click to select the **Discount Add-on Fees** checkbox. This will tell DVMAX to apply discounts to Add-on fees. Click again to deselect.

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

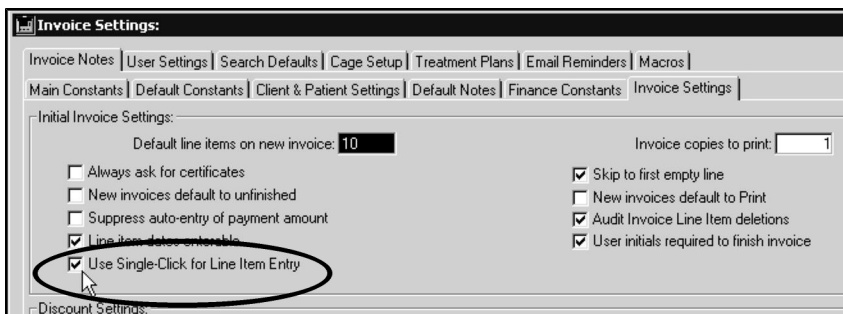- Click **OK** again to save your changes and exit System Constants.

Discount Label (System Constants)

The text entered in this setting under System Constants will appear on the printed invoice beside the discount amount. The default text is "discount". To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- From Invoice Settings, type a discount label in the **Discount Label** field.

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

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

Exclude Inactive Clients When Printing Statements

The **Exclude Inactive Clients When Printing Statements** setting in System Constants controls whether DVMAX will include clients marked as "Inactive" when printing statements (from **Gen-**

eral Management). If this checkbox is selected, statements will not be printed for inactive clients.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.
- From Invoice Settings, click to select the **Exclude Inactive Clients When Printing Statements** checkbox. Click again to deselect.
- Click **OK** to save your changes.
- Click **OK** again to save your changes and exit System Constants.

⚠️ Inactive clients can still owe you money. If you select this setting, do not overlook receivables pending for inactive clients.

Ignore Rx Info for Prescription Labeling

This setting in System Constants tells DVMAX whether to notify you when you try to print a prescription label from an invoice for a Bill Item that is out of stock.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.
- From Invoice Settings, click to select the **Ignore Rx Info for Prescription Labeling** checkbox. This tells DVMAX not to warn you if you write a prescription label for an item that is out of stock. Click again to deselect.
- Click **OK** to save your changes.
- Click **OK** again to save your changes and exit System Constants.

Include Bill Codes on Printed Invoices and Estimates

This setting in System Constants controls whether DVMAX prints Bill Codes as part of the description of line items on an invoice. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- From Invoice Settings, select the **Include Bill Codes on Printed Invoices and Estimates** checkbox to print Bill Codes on invoices. Deselect the checkbox to have DVMAX suppress printing of Bill Codes.
- Click **OK** to save your changes.
- Click **OK** again to save your changes and exit System Constants.

Invoice Copies to Print (system Constants)

This setting in System Constants controls how many copies of an invoice will be printed. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.
- From Invoice Settings, type the number of invoices you want printed in the **Invoice Copies to Print** field.
- Click **OK** to save your setting.
- Click **OK** again to exit System Constants.

Keep Line Item Providers When Converting Estimates

This setting in System Constants controls whether an Invoice created from an Estimate retains individual line item Staff selections from the Estimate. If this setting is checked, line items on the invoice's Staff boxes will contain the same values as on the originating Estimate. If this setting is unchecked, DVMAX will force each line item's Staff field to contain the Default Provider from the Estimate.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.
- Select the "Keep Line Item Providers When Converting Estimates" checkbox to keep the Estimate's line item Providers on a resulting Invoice. Deselect the checkbox to have DVMAX force line items to have the same value as the Invoice's default provider.
- Click **OK** to save your changes.
- Click **OK** again to save your changes and exit System Constants.

Line Item Dates Enterable (System Constants)

This setting in System Constants tells DVMAX to allow you to enter the dates for line items directly on the line items themselves while creating the invoice. This setting is particularly

useful for practices that enter invoice information after the fact (e.g.; for field visits and hospitalized patients).

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- Click to select the **Line Item Dates Enterable** checkbox. Click again to deselect.

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

- Click **OK** again to exit System Constants.

List Invoice Patients in Transaction (System Constants)

This setting in System Constants tells DVMAX to include patient names in the record of an invoice transaction. We recommend this setting be on to make it easy to see which patients were entered on which invoices.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- Click to select the **List Invoice Patients in Transaction** checkbox. Click again to deselect.

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

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

Max Discount Percentage (System Constants)

The number specified in this setting in System Constants is the maximum discount that can be applied to any item on an invoice. If no number is specified, the maximum discount is 0% - i.e., no discount can be applied on an invoice.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- Type a percentage in the **Max Discount Percentage** field.

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

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

New Invoices Default to Print (System Constants)

This setting in System Constants controls whether the **Print** checkbox is selected or unselected when you create a new invoice in DVMAX. If this setting is selected, the **Print** checkbox will be selected when you create a new invoice. If this setting is not selected, the **Print** checkbox will be selected when you create a new invoice.

To view or change the **New Invoices Default to Print** setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- Select the **New Invoices Default to Print** checkbox to have the **Print** checkbox unselected when you create a new invoice. Deselect the **New Invoices Default to Print** checkbox to have the **Print** checkbox pre-selected when you create a new invoice.

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

- Click **OK** again to exit System Constants.

New Invoices Default to Unfinished (System Constants)

This setting in System Constants controls whether the **Finished** checkbox is selected or unselected when you create a new invoice in DVMAX. If this setting is selected, the **Finished** checkbox will not be selected when you create a new invoice. If this setting is not selected, the **Finished** checkbox will be selected when you create a new invoice.

To view or change the **New Invoices Default to Unfinished** setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, locate and click the **Invoice Settings** tab.

- Select the **New Invoices Default to Unfinished** checkbox to have the **Finished** checkbox unselected when you create a new invoice. Deselect the **New Invoices Default to Unfinished** checkbox to have the **Finished** checkbox pre-selected when you create a new invoice.

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

- Click **OK** again to exit System Constants.

ℹ️ If you work with many unfinished invoices in DVMAX, it's best to select this setting to minimize the number of invoices you inadvertently mark as finished.

Post History and & Discharge Notes from Unfinished Invoices

This setting in System Constants determines when DVMAX transfers (or posts) a line item on an invoice to a patient's history. If this setting is selected, DVMAX will post from an invoice to a patient's history regardless of whether **Finished** is selected on the invoice. If it is not selected,

DVMAX will wait until you mark the invoice as finished before transferring a line item to the patient's history.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- From the **Processing & Printing** area of the **Invoice Settings** section, select **Post History and Discharge Notes from Unfinished Invoices** to have DVMAX transfer line items from unfinished invoices to patient histories. Deselect this setting to have DVMAX transfer line items from finished invoices only.

Prevent Back-Dating of Invoices and Transactions

If the **Prevent Back-Dating of Invoices and Transactions** setting is selected in System Constants, DVMAX will implement the following behaviors in regard to invoices and transactions:

- On new invoices, the "Date" field is prevented from being set to a date before the current date. This restriction is also true for the "Aging Date" field.

- When an invoice is back-dated, the date is automatically forced to the current date, but the line items are set to the back-dated value that the user entered.

- New transactions are prevented from being set to a date before the current date.

- When editing an invoice, if payments are not kept with the new invoice, DVMAX will generate new receivables and transaction records. These are constrained to the current date. As well, on the newly created invoice, the Invoice Date and Invoice Aging Date are constrained to the current date. The invoice line items on the newly created invoice do **not** have their dates constrained.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Click to change the **Prevent Back-Dating of Invoices and Transactions** checkbox.

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

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

Print Client Phone on Invoices

This setting in System Constants controls whether the client's phone number is printed on invoices. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Click to select the **Print Client Phone on Invoices** checkbox. Click again to deselect.

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

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

Print Practice Heading on Invoices

If this setting in System Constants is selected, DVMAX will print your practice's name and address at the top of invoices. If you are printing estimates on letterhead, turn this setting off.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Select the **Print Practice Heading on Invoices** checkbox to tell DVMAX to print your practice's name and address at the top of invoices.

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

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

Print Reminders on Invoices

This setting in System Constants controls which Reminders, if any, are printed on invoices. There are 3 options:

- **Never** - no reminders will be printed on invoices

- **Patients on Invoice** - only reminders for patients that appear on the Invoice will be printed.

- **All Patients for Client** - all reminders for all patients for the invoiced client will be printed. This is the default setting.

To view or change the **Print Reminders on Invoices** setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Click to choose **Never**, **Patients on Invoice**, or **All Patients for Client** from the **Print Reminders on Invoice** drop-down list.
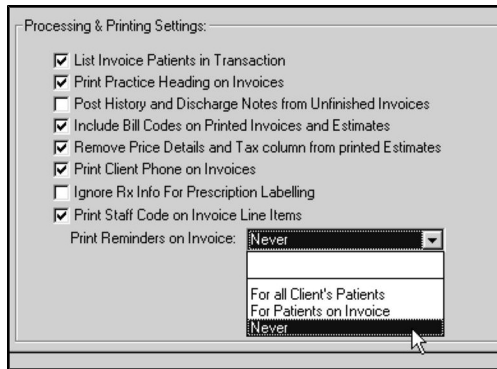
- Click **OK** to save your changes.
- Click **OK** again to save your changes and exit System Constants.

If the drop-down list is blank, this is equivalent to **All Patients for Client**.

The **Print Reminders on Invoices** setting applies to all clients in DVMAX.

Print Staff Code on Invoice Line Items

This setting in System Constants controls whether the staff codes on an invoice's line items appear on the line items on the printed invoice. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.
- Click to select the **Print Staff Code on Invoice Line Items** checkbox. Click again to deselect.
- Click **OK** to save your changes.
- Click **OK** again to save your changes and exit System Constants.

Receivables Aging Options for Backdated Invoices

This setting in System Constants controls whether the default Receivable Aging Date for back-dated invoices remains at the current date or is changed to the new date on the invoice. For more information, see **Backdating Invoices**.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.
- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Finance Constants**. Alternatively, click the **Finance Constants** tab.
- Click to select the **Date Invoice Entered** radio button to tell DVMAX to leave the default Receivable Aging Date at the current date when an invoice is back-dated.

-OR-

- Click to select the **Date Service Performed** radio button to tell DVMAX to change the default Receivable Aging Date to the backdated date of the invoice.

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

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

⚠ You can override the default behavior set by this **System Constant**.

Skip to First Empty Line

This setting in System Constants determines whether DVMAX places the cursor in the Qty field of the first empty line item when re-opening an unfinished invoice. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Click to select the **Skip to First Empty Line** checkbox. Click again to deselect.

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

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

Suppress Auto-Entry of Payment Amount

This setting in System Constants tells DVMAX whether to automatically fill in the client's balance in the Payment Amount field when accepting a payment. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Select the **Suppress Auto-Entry of Payment Amount** checkbox to tell DVMAX not to fill in a payment amount. Deselect the checkbox to have DVMAX automatically place full payment in the payment amount field.

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

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

Use Global Discounting on Invoices

This setting in System Constants tells DVMAX whether to allow discounting of all items on an invoice. If this setting is not in effect, only items specified as discountable can have discounts applied to them.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Select the **Use Global Discounting on Invoices** checkbox to tell DVMAX that all line items on an invoice can be discounted. Deselect the checkbox to respect the discountable setting of a Bill Item.

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

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

User Initials Required to Finish Invoice

This setting in System Constants determines whether DVMAX requires the user to type their initials when an invoice is finished. This allows you to determine exactly who in your practice completed the invoice. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Click to select the **User Initials Required to Finish Invoice** checkbox. This will cause DVMAX to present a dialog asking for initials when an invoice is finished. Click again to deselect.

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

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

Use Single-Click for Line Item Entry

This setting in System Constants determines whether a single or double-click in a line item field is required to edit that line item. If this setting is selected, DVMAX will allow editing of a line item field with a single-click into that field. If this setting is deselected, you must double-click a line item field to edit it inline. To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Click to change the **Use Single-Click for Line Item Entry** checkbox.

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

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

Zero and Non-Zero Balance Notes

The **Zero Balance Note** and the **Non-Zero Note** in System Constants affect the printed invoice. If the client has an unpaid balance when the invoice is printed, DVMAX will print the contents of the **Non-Zero Note** on the invoice near the client's balance. If the client does not have an unpaid balance, DVMAX will print the contents of the **Zero Balance Note**.

To edit the **Zero Balance** and **Non-Zero** notes:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**. The System Constants screen appears.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Notes**. Alternatively, locate and click the **Invoice Notes** tab. The Invoice Notes screen appears.

- Type your text in the **Zero Balance Note** and **Non-Zero Note** fields. You can leave either or both empty. Only the first 2 lines of text will display on the printed invoice for Zero or Non-zero balance notes, though DVMAX allows you to type more in each field.

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

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

Exclude Previous Balance from Printed Invoice

Selecting **Exclude Previous Balance from Printed Invoice** in System Constants allows a clinic to remove the Previous Balance box and label from a printed invoice. This information is not lost from the Client records only excluded from the printed invoice.

To view or change this setting:

- From the **Section** drop-down menu of the DVMAX main screen, choose **System Constants**.

- From the **System Constants** drop-down menu on the DVMAX main screen, choose **Invoice Settings**. Alternatively, click the **Invoice Settings** tab.

- Click to select the **Exclude Previous Balance from Printed Invoice** checkbox.

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

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

Item Categories

DVMAX uses Item Category records to classify Bill Items for reporting purposes. Some Financial Reports take advantage of Item Categories. You can have as many Item Categories as you like, but we recommend that you keep the total to around 20 or less for faster and simpler reporting.

This chapter deals with setting up and working with Item Category Records. For information on how categories are applied to a Bill Item, see **Bill Items**. For information on how categories are used in reports, see **Financial Reports**.

List All Item Category Records

To list all Item Category records:

- Choose **Inventory Management** from the **Section** drop-down menu.

- From the **Find** window, choose **Item Category** from the **Search For** drop-down list.
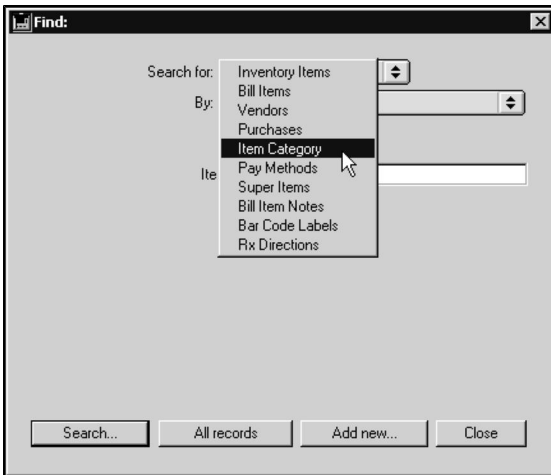
- Click **All Records**.
- The **Item Category List** displays.

About the Item Category List

The Item Category list displays one Item Category record per line. There are columns for Category Code, Name, Label, and Travel Sort Order.

Open an Item Category Record from the Item Category List

To open an Item Category record:

- Double click a selected record from the list

-OR-

- Click to highlight a record and click **Show**.

Add a New Item Category from the Item Category List

- Click **Add New** at the bottom of the Item Category List.

-OR-

- Choose **Add New** from the **Categories** drop-down menu.
- A new Item Category record window opens. See **Create a New Item Category Record** for more information.

Show a Subset of Records

- Click **Show** from the Item Category listing to display a group of selected records.

Exclude a Subset of Records

- Click **Exclude** from the Item Category listing to hide a group of selected records.

Search for an Item Category Record

To find an Item Category record:

- Choose **Inventory Management** from the **Section** drop-down menu.
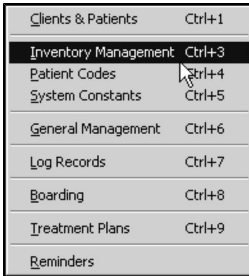
- From the **Find** window, choose **Item Category** from the **Search For** drop-down list.
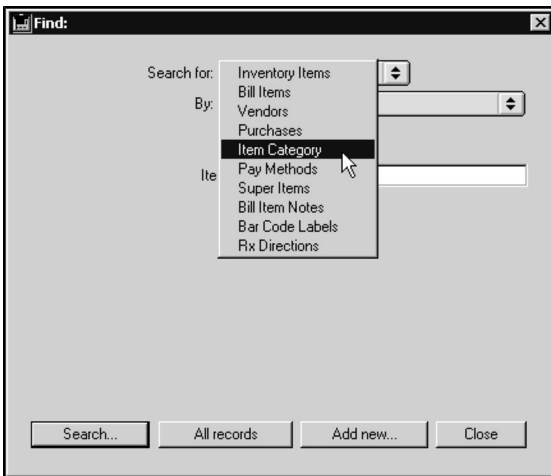
- Choose **Category Code** from the **By** drop-down list to search Item Category records by code.

-OR-

- Choose **Category Description** to search the description fields of Item Category records.
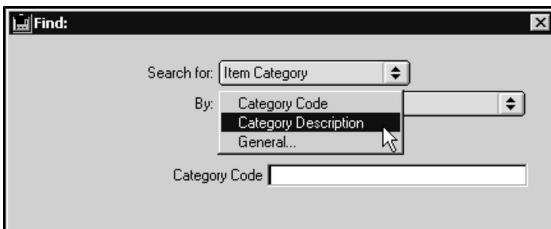
- Type a Category code or word from a Category description into the field below the **By** drop-down list. If you are searching by code, you can type as many of the characters of the Category code as you know. If you are searching by description, DVMAX will find all Categories whose descriptions contain the word or phrase you type.

- Click **Search**.

- If there is more than one match for your search, the Item Category List window will display a list of all Items that matched your search.

- If there is only one Item Category record that matched your criteria, DVMAX will open that record.

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

ℹ️ You can also quickly locate an Item Category record by following the steps in **List All Item Category Records** and double-clicking the record you are interested in from the list.

Create a New Item Category Record

To create a new Item Category record:

- Choose **Inventory Management** from the **Section** drop-down menu.

- From the **Find** window, choose **Item Category** from the **Search For** drop-down list.
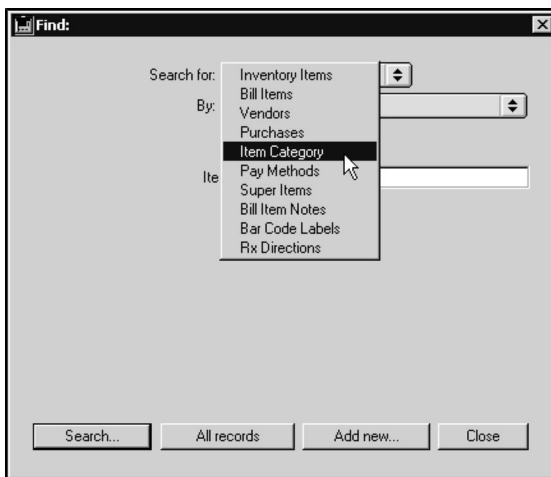
- Click **Add New**.

ℹ️ You can also add a new Item Category record by clicking the **Add New** button at the bottom of the **Item Category List**. See **The Item Category List** for more information.

- A new, blank **Item Category** opens.

- Type a unique name for this Item Category into the **Category** field.

ℹ️ The name can be up to 15 characters long, but is usually a two-character code matching the Bill Code for items of this category. See **Item Categories and Bill Item Coding** for more information.

- Type a description of this Item Category into the **Description** field. The description can be up to 35 characters long and is usually an expansion of the name.

- If this Item category record is to be associated with a General Ledger account, click the magnifying glass to open a pick list of GL Accounts. Select an account and click **OK**.

- Type the text that will represent this Item Category on graphs into the **Label** field. This can be 5 characters long and is usually identical to the name.

- Type a number into the **Travel Sort** field. This number tells DVMAX where to place Bill Items from this Item Category on a printed travel sheet. The lower the number, the higher an item from this category will appear on a travel sheet. Items from a category with a Travel Sort order of 0 will appear at the top of a travel sheet; items from a category with a Travel Sort order of 100 will appear at the bottom of a travel sheet.

ℹ The lowest Travel Sort number should be 0.

- Click **OK** to save the new Item Category record.

Item Categories and Bill Item Coding

We recommend a standardized coding system for Bill Items in which two or three letters or numbers identify the Item Category of the Bill Item, followed by a number that makes the code unique.

For example, Laboratory items might be listed as: Lab001, Lab002, Lab003. For more information on Bill Item codes, see **Bill Items**.

Changing an Item Category Description

You can change the Description, Label or Travel Sort order of an existing Item Category. To change the label or Travel Sort values, simply find and open the relevant Item Category record, type the new values, and click **OK**.

To change the Description, find and open the relevant Item Category record, then:

- Click the **Change** button beside the Description field. DVMAX will warn you that changing the Description will change the Description on all records that already use this Item Category.
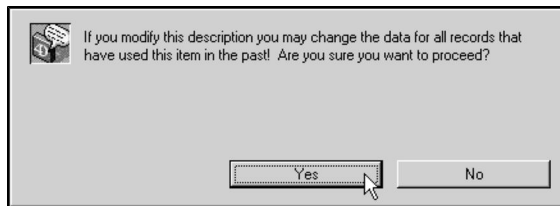
- The Description field will change color from grey to white. Type the new description into the **Description** field.
- Click **OK** to save your changes and close the Item Category record.

Deleting an Item Category

To delete a single Item Category record:

- Find and open the Item Category you wish to delete. See **Searching for and Finding an Item Category.**
- Click the **Delete** button at the bottom of the Item Category window.

- DVMAX will ask you to confirm that you want to delete the Item Category record.

- Click **OK** to continue, or click **Cancel** to go back to the Item Category window.
- DVMAX will check to make sure you want to delete the record. Click **OK** to continue and delete the record.
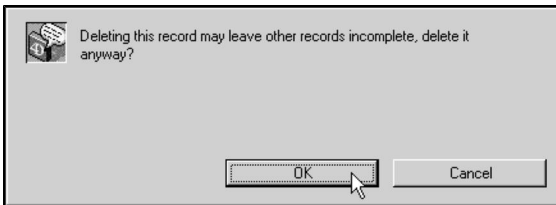
- Click **OK**.

To delete multiple Item Categories from DVMAX:

- List all Item Categories (see **List All Item Category Records**).
- Click to select the Item Categories you wish to delete.
- Choose **Delete Records** from the **Categories** drop-down menu.

- DVMAX will ask you to confirm that you want to delete the Item Categories. Click **Delete** to delete the selected item categories, or **Stop** to go back to the Item Category window.
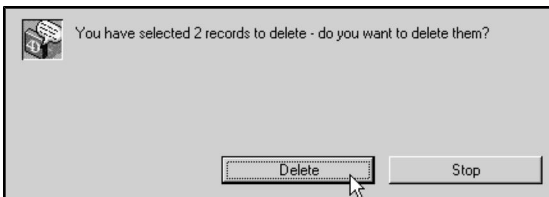
- DVMAX will check to make sure you want to delete the record. Click **Delete** to continue and delete the record.

⚠ When you delete an Item Category, you will need to reassign a valid Category to any Bill Items that used the deleted Item Category. See Bill Items for more information.

Setup Label Printers

The **Setup Label Printers** function lets you add and configure a label printer attached to a workstation and enables you to make that label printer available to other workstations. If you have more than one label printer, **Setup Label Printers** allows you to select which printer to use for a particular label type. As well, this function offers also you label formatting options, such as including client or clinic address information on prescription labels

Keep in mind that labels generally have fairly limited "real estate". There is only so much room on a label in which to fit information. However, DVMAX has a number of great label printing features to help generate many label styles. DVMAX allows you to use driver-based printing and network-based printers.

ℹ️ If you have any questions about optimizing label printing, please contact DVMAX Technical Support for assistance.

⚠️ The printer preferences you select under **Setup Label Printers** will only apply to the current workstation. If you have more than one workstation from which you plan to print labels, you must set the label printing preferences for each workstation individually, even if all stations are sharing the same set of printers.

Setting Up Label Printers: An Overview

The following is a quick overview of the steps involved in adding a label printer and setting label printer preferences. For more on a particular step, see the related section in this Chapter.

To add a new label printer and set label printer preferences:

- From the **File** menu on the **DVMAX** main screen, select **Setup Label Printers**.
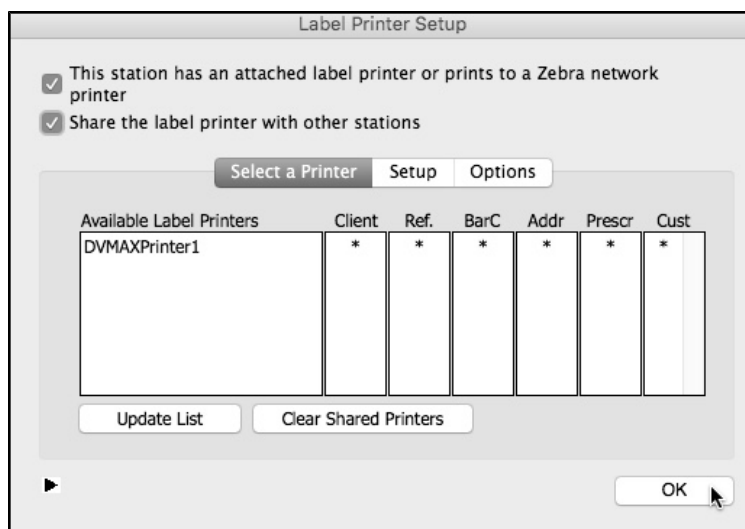
- If you have connected a label printer to your workstation or will be printing to a Zebra network printer, select **This station has an attached label printer or prints to a Zebra network printer**. A printer Setup dialog will display. You will need to complete several steps to set the preferences for the attached printer.

  -OR-

- If your workstation does not have an attached label printer, the **This station has an attached label printer** checkbox should be empty (not selected).

- Click **OK** on the message pop-up window that opens to notify you that label printing is enabled.

- Click **Share the label printer with other stations** to make the attached label printer available to other workstations.
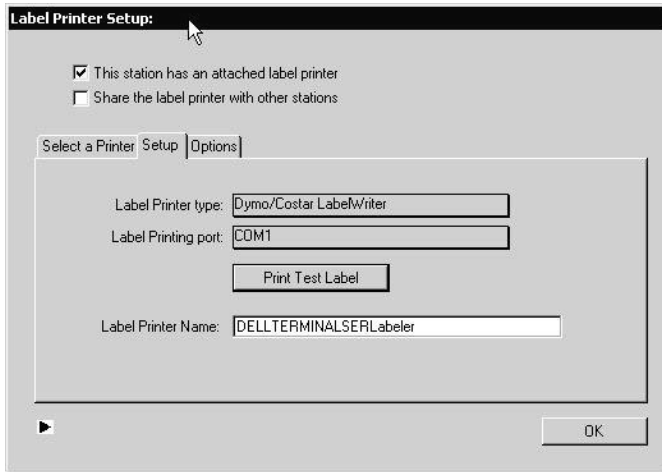
- From the **Setup** tabbed window, click the **Label Printer Type** menu and select the type of label printer that is attached to the workstation.

  - Select a printer port from the **Label Printing Port** menu, where applicable. You will not see this option if you select Driver-Based Printing.

  - If you select Driver-Based Printing from the **Label Printer Type** menu, you will see **Selected Printer Driver** menu. Select a driver.

  - Type a name for the attached label printer in the **Label Printer Name** field.

  - From the **Options** tab, select print style options, as needed.
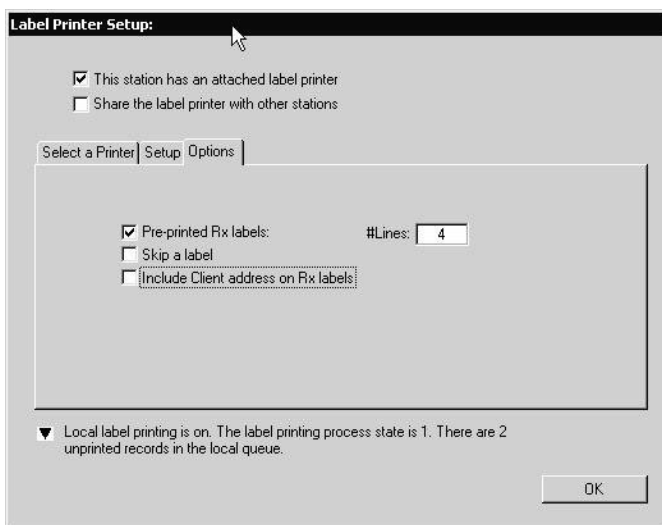
- Click **Update List** from the **Select a Printer** tab to add the label printer to the list of available printers.

- From the **Select a Printer** tab, click in the appropriate column to identify the label printer your workstation should use for each label type. Only those printers that appear on the list can be used for label printing.

- Click **OK** from the **Label Printer Setup** box to save preferences.

Opening the Label Printer Setup

To access the label printer setup:

- From the **File** drop-down on the **DVMAX** main screen, click **Setup Label Printers**
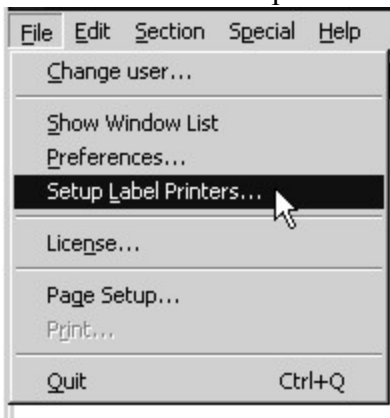
- A **Label Printer Setup** dialog box opens. If no printers have been added, the **Select a Printer** list area will be empty.
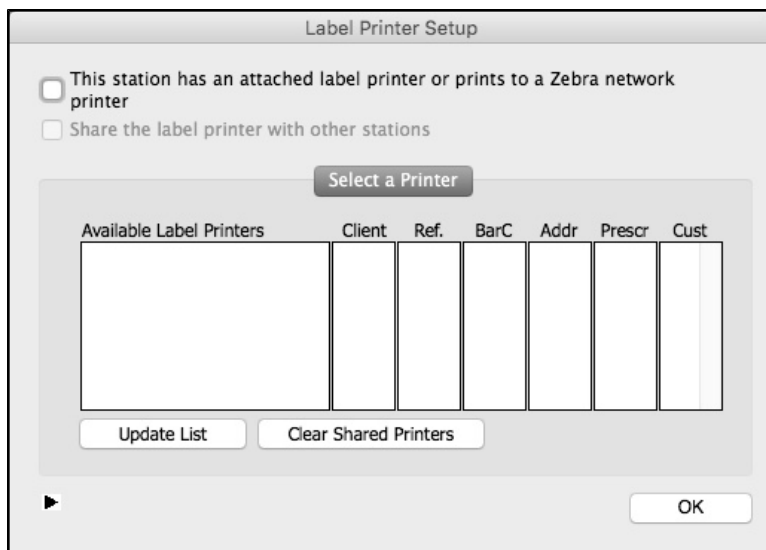
About the Label Printer Setup Window

The **Label Printer Setup** window will look different depending on whether you have a label printer attached to the workstation. If your workstation has an attached label printer, the **Thisstation has an attached label printer or prints to a Zebra network printer** option will be selected and three tabbed dialogue boxes will appear in the **Label Printer Setup** window. Otherwise, you will only see the **Select a Printer** tab, and the shared label printers available through other workstations will be listed.

Attached Label Printer

If there is a label printer connected to your workstation, you will need to identify this under **Label Printer Setup**.

To indicate an attached label printer:

- From the Label Printer Setup window, click **This station has an attached label printer or prints to a Zebra network printer**.
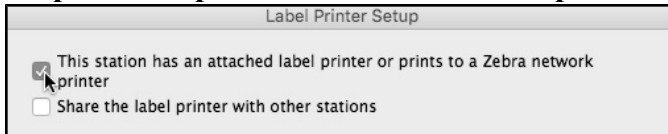
- A message box opens indicating that the label printer attached to the workstation is now available for printing. Click **OK** from the message window to continue. You will still need to set the preferences for the printer and add it to the printer list before it can be used.
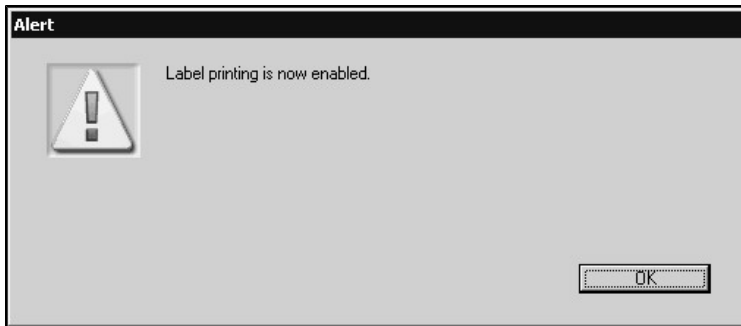
- Click **Thisstation has an attached label printer or prints to a Zebra network printer** again to deselect.

⚠ By deselecting **This station has an attached label printer or prints to a Zebra network printer**, the printer will no longer be available to print labels by the attached workstation or any other workstations that may be sharing that printer.

Share Label Printer

You must select the **Share** option if the label printer attached to the current workstation is to be available to other stations.

To share the label printer:

- From the **Label Printer Setup** window, click **Share the label printer with other stations**.
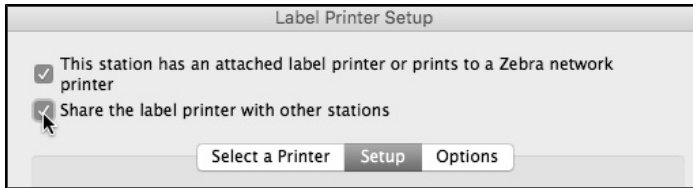
- Click again to deselect. The attached printer will no longer be available for use by other stations.

⚠️ By deselecting **Share the label printer with other stations**, the printer will no longer be available to print labels by any workstation not directly attached to the printer.

Configuring a Label Printer

You will need to set the preferences for the attached label printer and add it to the printer list before it can be used.

To setup the printer:

- From the **Setup** tab, select a label printer type. You may either select a printer from the list or select Driver-Based Printing if you wish to use an attached printer employing driver-based printing.
- If you select a label printer type other than Driver-Based Printing, select a label printer port from the Label Printer Port/IP drop down menu.
- If you are using a printer with driver-based printing, select the driver from the **Selected Printer Driver** menu. You will only see this menu if you have already selected Driver-Based Printing from the **Label Printer Type** menu.
- Provide a label printer name.
- From the **Select a Printer** tab, click **Update List** to add the printer to the list.

⚠️ If you are using a serial to Ethernet adapter or network printer, you will need to specify an IP address. Contact DVMAX Technical Support for assistance.

Driver-Based Printing

Driver-based printing is a feature that was added in DVMAX v8.0 to permit greater printer flexibility and accommodate requests from DVMAX users. Driver-based printing may require users to fine-tune the margins and font size to print properly to various label sizes employed. Please contact DVMAX Technical Support for setup assistance if you need to make adjustments to print formatting for standard size labels.

Selecting Label Printer Type

Use the **Label printer type** menu to identify the type of label printer (the make or model) connected to your workstation.

To select a printer type:

- From the **Setup** tab, click the **Label printer type** button.
- From the drop-down menu, select the type of label printer attached to your workstation.
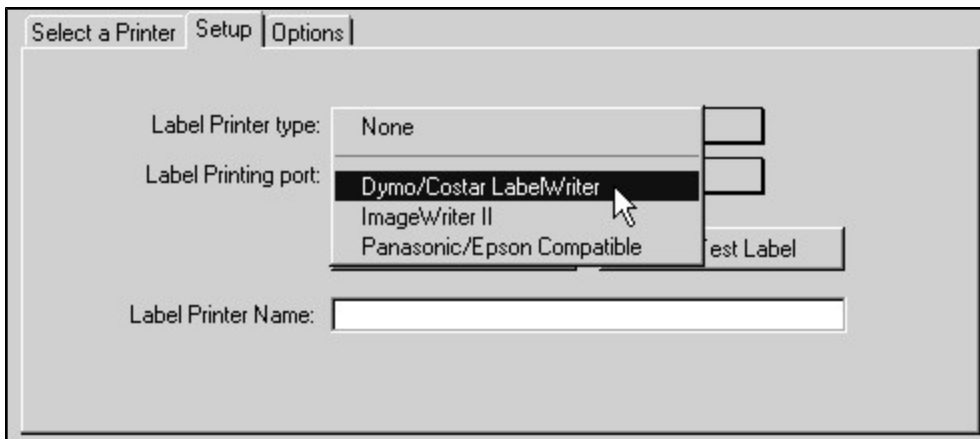
Selecting the Label Printing Port

During **DVMAX** installation and initial setup, **DVMAX** will automatically select a printer port for you. The port is where the cable running from the printer connects to your workstation. Most computers have more than one port (and types of ports), often in use for connections to equipment such as printers, modems and blood analyzers.

If it is not already set up or you have added a new printer since installation, you need to identify the number of the port associated with the label printer connection. If the wrong port is selected, information cannot be sent to any printer attached to your workstation.

To select or change the printer port setting:

From the **Setup** tab, click the **Label Printing Port** button.

- From the drop-down menu, select the port for the attached label printer.
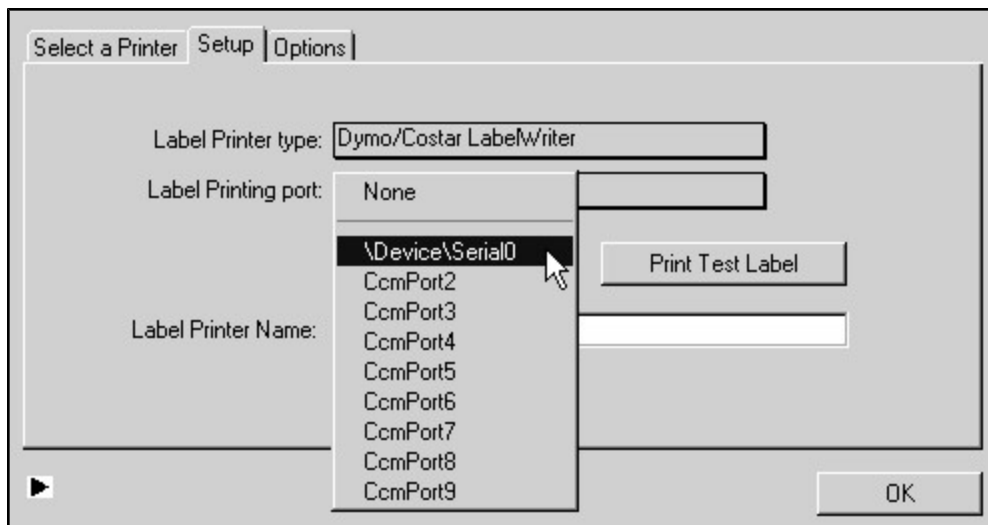
⚠️ If you are using a serial to Ethernet adapter will need to specify an IP address. Contact DVMAX Technical Support for assistance.

Printing a Test Label

To test that your labeler and port are properly set up, you can try printing a test label.

To test your printer:

- From the Setup tab, click **Print Test Label**.
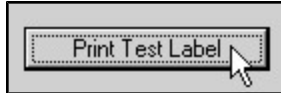
- Click **OK** from the **Confirm** window to print the label. Click **Cancel** to close the **Confirm** window without printing a label.
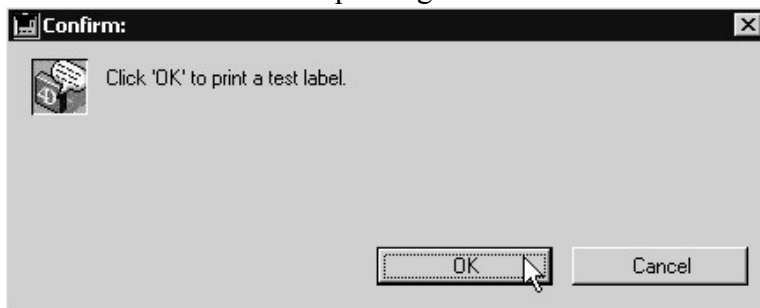
- A message window will notify you when the test label is sent to the printer. Click **OK** to close the message window.

Label Printer Name

You must assign a name to the attached label printer. This could be a descriptive title letting users know where the printer is located or indicating its main function. For example, you could use "Pharmacy Printer" to name the printer on which prescription labels are run. If other workstations have access to this printer, the name can be a quick way to identify a printer's location in the office.

To assign a name to the attached label printer:

- From the **Setup** tab, type a name for the label printer in the **Label Printer Name** box.

Label Printer Name: | Pharmacy Printer

Updating the Printer List

Before you can use a newly added printer, you need to add it to the list of available printers. The list is shown on the **Select a Printer** tab.

To add an attached label printer to the list:

- From the Select a Printer tab, click Update List.

Update List

- The list of available printers will be updated to include the attached printer.

| Select a Printer | Setup | Options |

Available Label Printers	Client	Ref.	BarC	Addr	Prescr	Cust
ACER-TRAVELMATELabeler	x	x	x	x	x	x
PELICAN-TRAVELMLabeler						
Pharmacy Printer						

Update List

Choosing Printers for Specific Label Types

You can choose to have all of your labels, regardless of type, printed from the same printer. If you have more than one label printer available (either attached or shared with other workstations), you can choose to select different printers for specified tasks. For example, you may use one printer to run prescription labels, while another is used to create address labels.

To select the label printer preferences for the current workstation:

- Choose the **Select a Printer** tab.
- Six different, pre-configured label types are provided as column headings across the top of the Printers list. These include the customizable Word Processing labels, which you can define and access under the **Special** menu from the DVMAX main screen.
- For each label type, click the cell that represents the printer type you want to use. An asterisk will indicate the printer that will be used for the specified label type.

ℹ️ The printer preferences you select will only apply to the current workstation. You will need to set the label printing preferences for each workstation individually.

Pre-Configured Label Types

There are six pre-configured label types listed as column headers under the **Select a Printer** tab. These are:

- **Client**: Client labels
- **Ref**.: Referral labels
- **BarC**: Bar Code labels
- **Addr**: Address labels
- **Presc**: Prescription labels
- **Cust**: Custom labels

ℹ️ If you have any questions about optimizing label printing, please contact DVMAX Technical Support for assistance.

Printer Options

The **Options** tab contains a series of specific label printing preferences that can be selected.
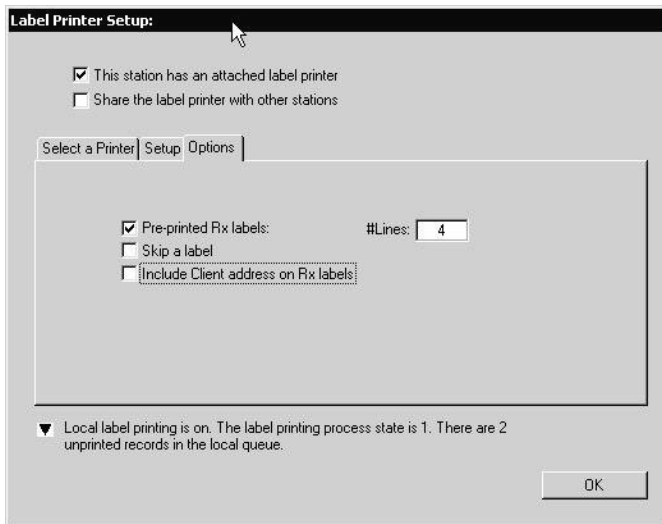
To select an option:

- Click to select an **Option** from the list.
- Click again to deselect.

Power Print

This option is only available with certain printers.

Skip Label

Use this option to leave a blank label between prints

Include Client Address on Rx Labels

Select this option to have a client's address printed on your prescription labels.

Pre-Printed Rx Labels

Select this option to have prescriptions labels run on pre-printed labels. Make sure that you have pre-printed labels loaded in the printer before selecting this option and printing labels.

Number of Lines

Type the number of lines to be printed on the labels. A default number appears in the **#Lines** box until you type a new value.

#Lines: 4

Checking Printer Status

To check the status of label printing tasks:

- Click the small arrow at the bottom left corner of the **Label Printer Setup** window

Update List

- A status message displays.

▼ Local label printing is on. The label printing process state is 1. There are 3 unprinted records in the local queue.
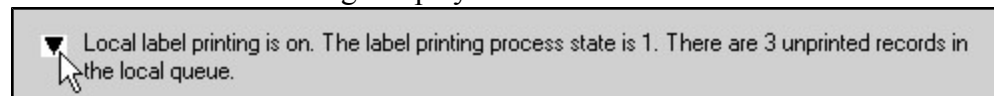
⚠ If the **Ignore Rx info for Prescription Labelling** system constant is checked, DVMAX will not warn you about expiration dates on pharmacy lots when Rx label printing. Refer to System Constants for more information.

ℹ The patient name is now included on the label when using Print->Labels and choosing "Addr Label for Patient" in the label editor.

Configuring Rx Label Space

There are a number of settings that affect Rx label printing. These include:

- A limit on the number of characters that can be used in the first address line on the label. This is truncated at 28 characters. A warning displays if the user enters an address longer than 28 characters in **System Constants**.
- The phone number is listed on the same line as the address1. This is controlled by a special setting.
- The warning at the bottom of the label has been compressed onto one line
- There is a default option to not word-wrap the text on the label, but simply to break it at the label width.
- The label description can have a maximum length of 240 characters.

ℹ️ If you have any questions about optimizing label printing space, please contact DVMAX Technical Support for assistance.

Monitoring the Label Printing Process

You can have DVMAX monitor label printing and have it alert you if your labels have not been printed within a particular amount of time. The alert is displayed in the palette, like a client or patient alert.

With the default settings, DVMAX will wait two minutes after a label has been printed, and will then check if the printing was successful. If it was not successful, an alert will be displayed on the screen of the originating computer.

ℹ️ If you have any questions about optimizing label printing, please contact DVMAX Technical Support for assistance.

Save Printer Setup

To save printer preferences:

- Click **OK** from the **Label Printer Setup** window.

DVMAX License Codes

DVMAX will run in demonstration mode until you enter a valid Clinic ID and License Number.

About Demonstration Mode

While in demonstration mode, DVMAX will limit the result of any search you perform for clients or patients to a chronological list of the first 100 relevant records. This means that while you can input an unlimited number of clients and patients into DVMAX with the demonstration license, you will be able to work only with the first 100 that you create.

In all other respects a demonstration license is functionally equivalent to a purchased license. This allows your practice to set up and evaluate DVMAX in your regular working environment.

Entering Your DVMAX License Code

⚠ If you are using DVMAX client/server, entering or altering a license code on any client machine on your network modifies the license code for your entire DVMAX installation.

In order to license your copy of DVMAX, you will need three pieces of information:

- **Your DVMAX Administrative username and password.** By default, the administrative username is "Administrator", though you may change it to something else. You must be logged into DVMAX as the Administrative user in order to enter or alter your license code.

- **Your unique Clinic ID** provided when you purchased DVMAX.

- **Your License Number** provided when you purchased DVMAX.

⚠ Store your Clinic ID and License Number in a safe and secure place.

To enter a license for your copy of DVMAX:

Ensure that you are logged into DVMAX as the Administrative user.

- Close all windows, so that only the DVMAX splash screen (and optionally, the Window List and Command Palette) are visible.

- Choose **License** from the **File** drop-down menu.
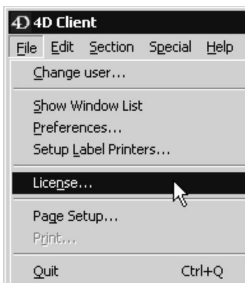
- The **License Information** window opens.
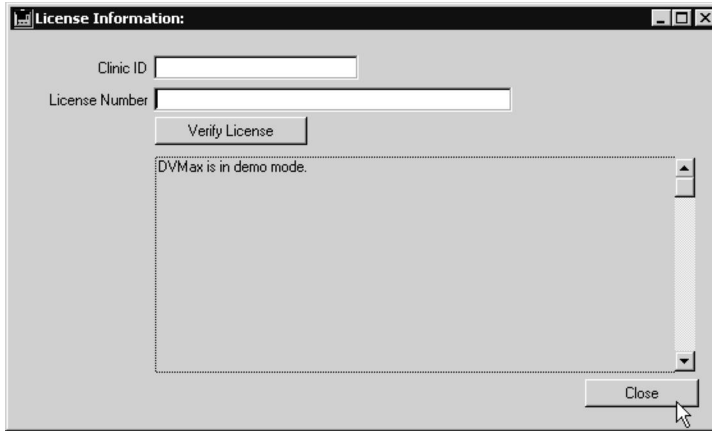
- Type your clinic ID into the **Clinic ID** field.

- Type your License Number in the **License Number** field exactly as supplied to you.

- Press **<TAB>.**

- If you have typed your Clinic ID and License Number correctly, you will see a message confirming that this copy of DVMAX has been licensed.
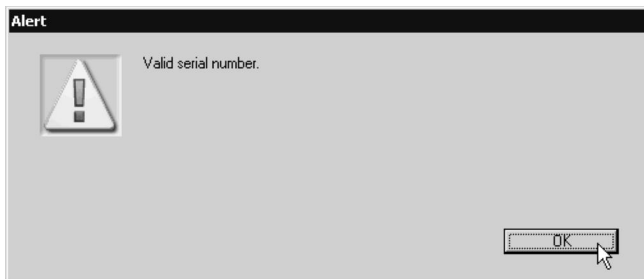
- If there is an error in either the Clinic ID or License Number, DVMAX will notify you of the error.
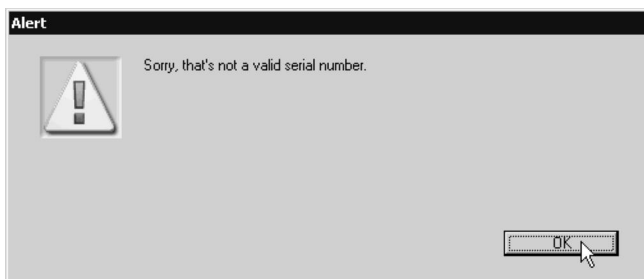
- In this case, re-enter both numbers, checking each carefully. If you continue to have problems, contact DVMAX Technical Support.

- DVMAX will display detailed information about your license, including the version number licensed, number of terminals and remote stations covered by this license, and available modules, in the License Information window.

```
Version: 7.0
# Terminals: 255
# Remote Stations: 255

Available Modules: Remote Processing, Web Recording, Multi-Practice Access,
Financials
```
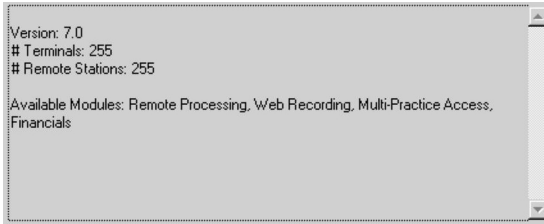
- To close the License Information window and continue working with DVMAX, click the **Close** button.

View License Information

To view your License information:

- Select **License** from the **File** menu.

Log Records

DVMAX has several record logging features to assist you. You can access the following logs in DVMAX:

- Pharmacy Log
- Radiation Log
- X-Ray Log
- Lab Log
- Anesthesia Log
- Controlled Substances Log
- Email Reminders Log

Pharmacy Log

If you select the **RX Item** setting on the **Pharmacy Details** tab of an Inventory record, when you add an MRE with an MRC for that item to a patient's history, the item will be included in the Pharmacy log.

To view the Pharmacy log:

- From the **Section** menu, choose **Log Records**.
- From the **Find** dialog, select **Pharmacy Log** from the **Search For** menu.
- Choose an option from the **By** drop-down menu:
  - **Date (Rx Date) or (Start, End)** – Prescription date (for a specific date) or start, end (for a date range).
  - **Rx # (Rx#) or Start #, End #)** – Prescription number (for a specific number), or start #, end # (for a range of Rx numbers).
  - Rx Item Code
  - **Rx Item Name (starts with)**
  - **Schedule Class** (0,2,3,4,5)
  - **Scheduled Drugs**
  - Patient Name
  - Patient ID
  - **General** – Click **Search** to open a Query editor, where you can build a custom query with available tables and fields, comparison operators, and values.

View a Pharmacy Log Record

In the Log list, double-click an entry to view a pharmacy log record. Click **Print** to reprint the Rx label.

Radiation Log

If the **Radiologic** special setting is selected in a defined MRC, DVMAX will either initiate or complete a Radiation log entry when you add an MRE with this setting selected to a patient's history. These items are added to the Radiation log.

To view the Radiation log:

- From the **Section** menu, choose **Log Records**.

- From the **Find** dialog select **Radiation Log** from the **Search For** menu.

- Choose an option from the **By** menu:

  - **Date** – Enter a specific date or a range of dates. Use a comma between the start and end date of a date range.

  - **Radioisotope** – Enter the radioisotope you are searching for.

  - **Patient** – Type a patient name.

  - **General** – Click **Search** to open a Query editor, where you can build a custom query with available tables and fields, comparison operators, and values.

X-Ray Log

If the **X-Ray** special setting is selected for a defined MRC, DVMAX will present the X-Ray Log Entry dialog when you add an MRE with this setting selected to a patient's history. These items are added to the X-Ray log.

To view the X-Ray log:

- From the **Section** menu, choose **Log Records**.

- From the **Find** dialog select **X-Ray Log** from the **Search For** menu.

- Choose an option from the **By** menu:

- **Date (X-Ray Date) or (Start, End)** – X-Ray date (for a specific date) or start, end (for a date range).

- **Patient** – Specify a patient's name.

- **General** – Click **Search** to open a Query editor, where you can build a custom query with available tables and fields, comparison operators, and values.

View an X-Ray Log Record

Double click a record in the X-Ray Log list to view that record.

Lab Log

When a lab result is returned to DVMAX, it will be recorded to the lab log. To view the Lab log:

- From the **Section** menu, choose **Log Records**.

- From the **Find** dialog select **Lab Log** from the **Search For** menu.

- Choose an option from the **By** menu:

  - Patient ID and Name

  - Keyword in recent entries

  - **Problem entries** (no input)

  - Lab Reference Number

  - Lab Source

  - **Date (Lab requisition Date) or (Start, End)** – Lab requisition date (for a specific date) or start, end (for a date range).

  - **Keyword** in all entries

  - **General** – Click **Search** to open a Query editor, where you can build a custom query with available tables and fields, comparison operators, and values.

View and Assign the Lab Log Record

DVMAX automatically assigns incoming lab results to the appropriate patient record. However, occasionally records may be returned that do not get assigned. You can manually assign these records. To view a lab log record and/or attach the record to a patient:

- From the Lab Log window, double click a record to open it. You can review lab results in either a text format or using a graph. For more information on lab results, see the **Integrations, Requisitions and Lab Results** chapter in this manual.

- For unassigned results, open the lab result and click **Assign**. That opens a Patient pick list, allowing you to assign the record to the appropriate patient.

- Note that the date format for lab results may correspond to the format used by the Provider from which the results were derived.

- Once a patient is assigned to the record, you may view the Patient record from the Log record window.

- Click **OK and View Patient** to open the patient record.

- You are prompted to record the viewing of the lab log. To record the viewing, click **Yes**. Otherwise, click **No**. If you click **Yes**, the viewing is recorded in the Lab log record, in the Viewings field.

- Use the **Previous** and **Next** buttons to move between Lab Log records.

- Click **Delete** to remove the Lab Log record. You are advised that deleting a record may leave other records incomplete. Click **OK** to continue, otherwise, click **Cancel**.

Anesthesia Log

If the **Anesthesia Log** special setting is selected on a defined MRC, DVMAX will present the Anesthesia Log Entry dialog when you add an MRE with this setting selected to a patient's history. These items are added to the Anesthesia Log.

To view the Anesthesia log:

- From the **Section** menu, choose **Log Records**.
- From the **Find** dialog select **Anesthesia Log** from the **Search For** menu.
- Choose an option from the **By** menu:
  - **Date** (start, end) – Type a date range using a comma to separate the Start Date and End Date of the range.
  - **Anesthetic Agent** – Enter the name of the anesthetic agent for which you are searching.
  - **PreAnesthetic Agent** - Enter the name of the preanesthetic agent for which you are searching.
  - **General** – Click **Search** to open a Query editor, where you can build a custom query with available tables and fields, comparison operators, and values.

View an Anesthesia Log Record

Double click a record in the Anesthesia Log list to open that record.

Controlled Substances Log

When you create an MRC with the **Controlled Substance** special setting selected, DVMAX will present the Controlled Substance Log Entry dialog when you add an MRE using this MRC in a patient's history. These items are added to the Controlled Substance log.

When you select the **Controlled Substance** setting, the **Schedule** dialog opens. Select the Schedule associated with this item.

To view the Controlled Substances log:

- From the **Section** menu, choose **Log Records**.

- From the **Find** dialog, select **Controlled Substances Log** from the **Search For** menu.

- Choose an option from the **By** menu:

  - **Medication** – Enter the name of the medication you are searching for.

  - **Staff Initials** – Enter the initials to be used for the search.

  - **General** – Click **Search** to open a Query editor, where you can build a custom query with available tables and fields, comparison operators, and values.

View a Controlled Substance Log Record

Double click a record in the list to open it.

Email Reminders Log

If you select the **Email Reminders** check box on a client record, when email reminders are due, they are sent and added to the **Email Reminders** log.

To view the Email Reminders log

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- From the **Section** menu, choose **Log Records**. The **Find** dialog opens.

- Select **Email Reminders Log** from the **Search For** menu.

- Choose an option from the **By** menu:

  - Patient ID and Name

  - Client ID and Name

  - Date (start, end)

  - **General** – Click **Search** to open a Query editor, where you can build a custom query with available tables, fields, comparison operators, and values.

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 creating new macro records under Patient Codes -> Macros.

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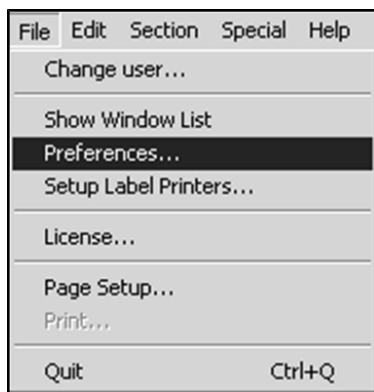
- Click to select the **Use Macros** checkbox.
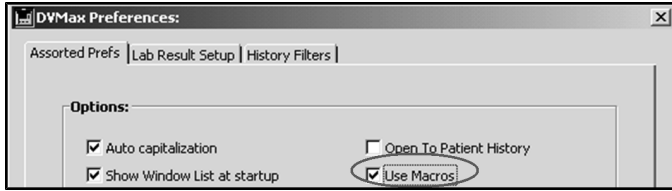
- Click **OK**.

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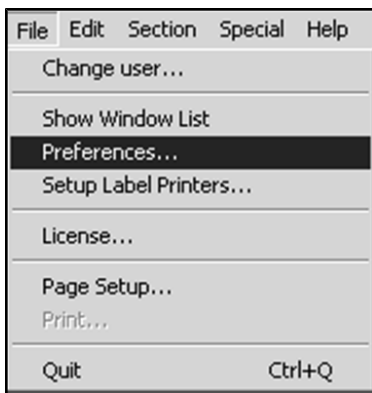
- Click to deselect the **Use Macros** checkbox.
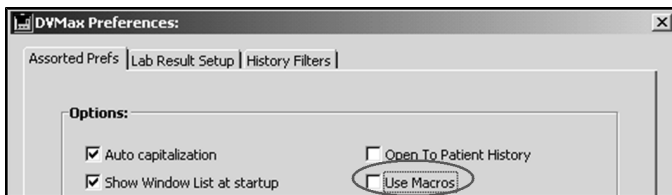
- Click **OK**.

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 backslash (the "\" key) 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.
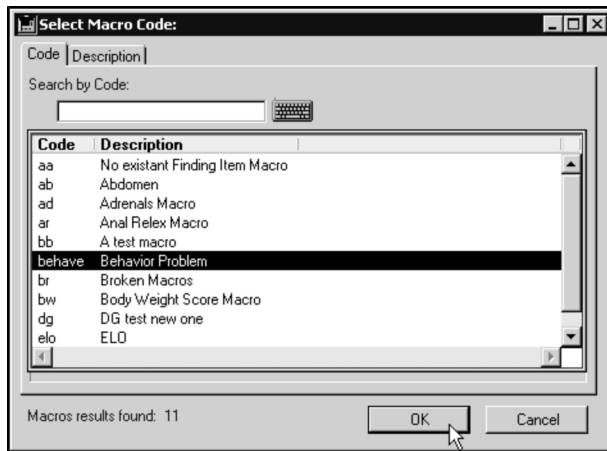
- Double click a Macro from the list to choose it, or click **Cancel** to choose none.

Listing All Macros

To list all available Macros:

- Type backslash (the "\" key) and a space into a word-processing or text area that utilizes Macros. DVMAX will present a list of all macros to choose from.
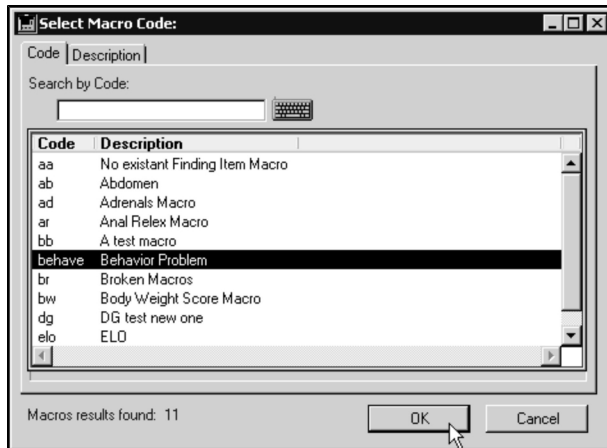
- Double click a Macro from the list to choose it, or click **Cancel** to choose none.

Defining a Simple Macro

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

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

- From the **Find Dialog**, choose **Macros** from the **Search For** drop-down list.
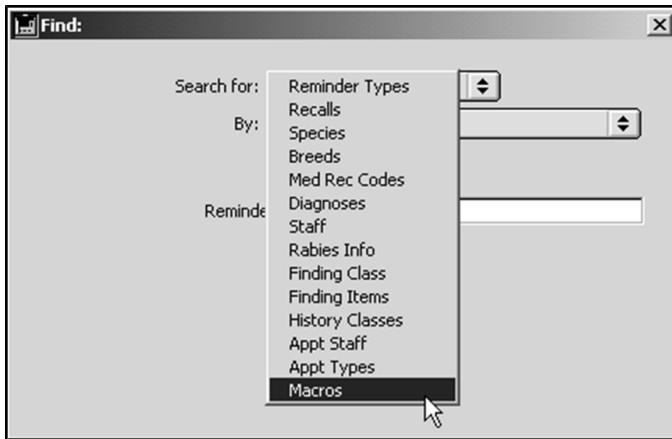
- Click **Add New** at the bottom of the **Find dialog**.

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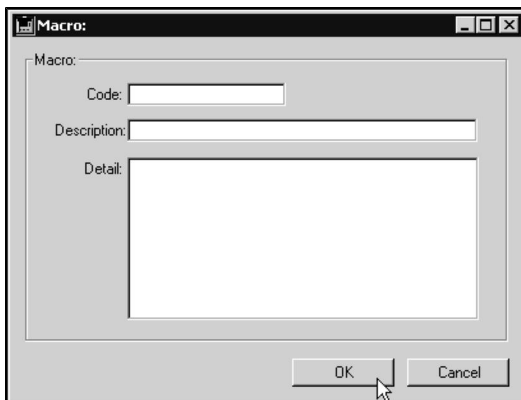
- Type the short code for this Macro into the **Code** field. This code is the abbreviation you will type to invoke this Macro in a text area.

⚠️ Do not start the code with "\". The backslash character is used only in word processing or text areas to invoke the macro, 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.
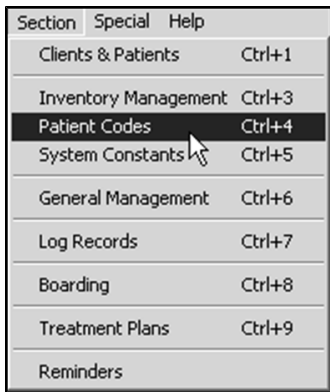
- From the **Find** dialog choose **Macros** from the **Search For** drop down list.

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

- OR -
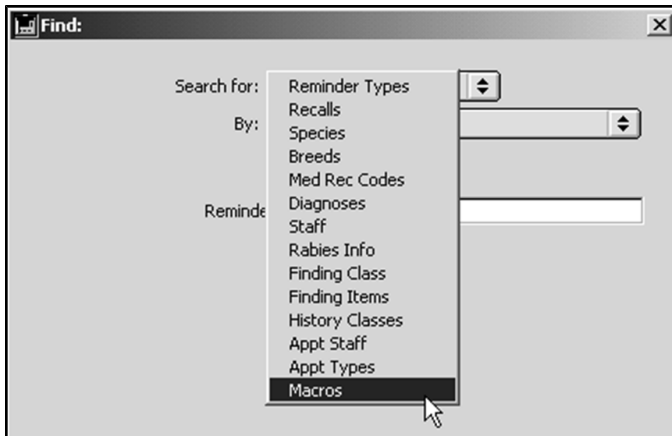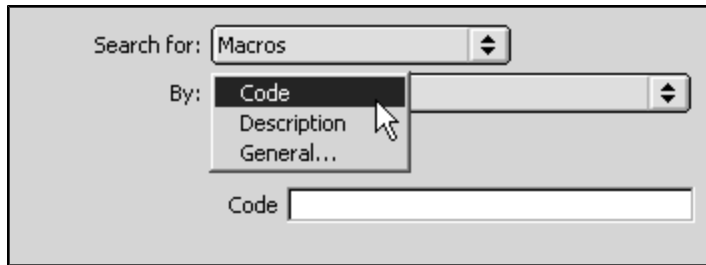
- To search for a Macro by a keyword in its description, choose **Keyword** from the **By** drop-down list.
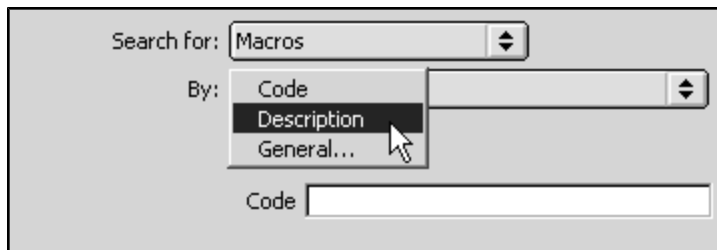
⚠ The Description search is a leading character search; it will match those Macros whose description starts with the characters you type. For example, a keyword search for "Pharmacy" will match "Pharmacy Item" but not "Item in Pharmacy".

ⓘ 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.

ⓘ To get a list of all Macros currently defined in DVMAX, chick **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.

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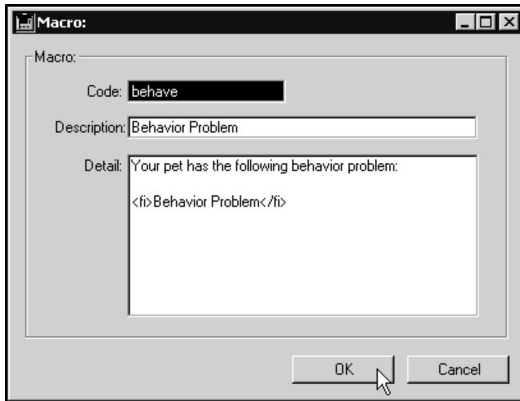
- Edit the **Code, Description** and **Detail** boxes as desired. Explanations of the purposes of each box can be found in **Defining a Simple Macro**.
- Click **OK** on the Macro window to save your changes.

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.
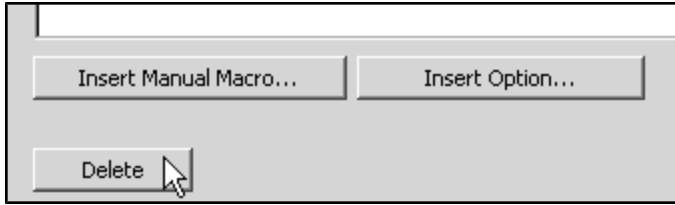
- DVMAX will ask you to confirm that you wish to delete this Macro.
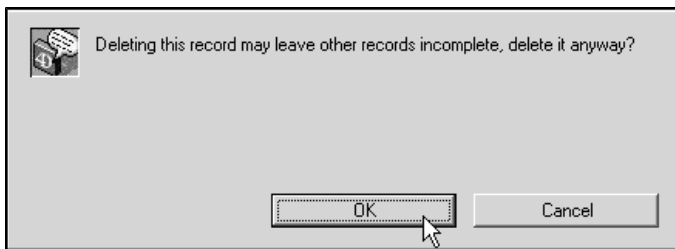
- Click **OK** on both dialogs. The Macro is deleted from the list and can no longer be used in DVMAX.

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.

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 record.

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

- Click to select the **Support MRE Macros** checkbox on the **Finding Item** record.
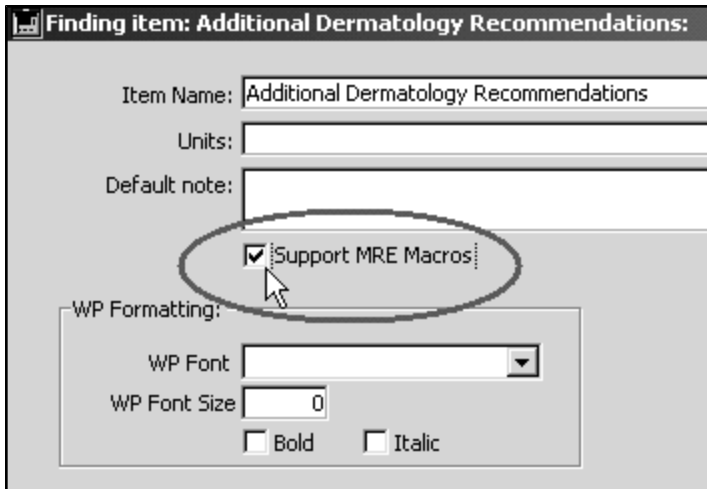
Defining a Macro Containing a Finding Item

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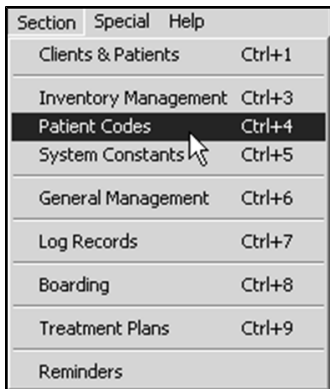
- From the **Find** dialog choose **Macros** from the **Search For** drop down list.
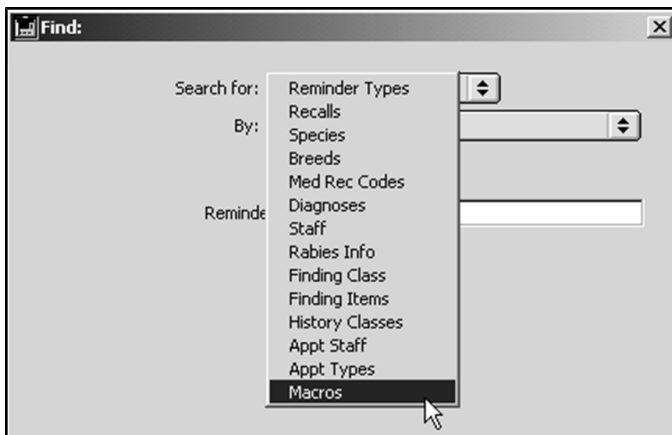
- Click **Add New**.

- A new, blank **Macro** record window opens.
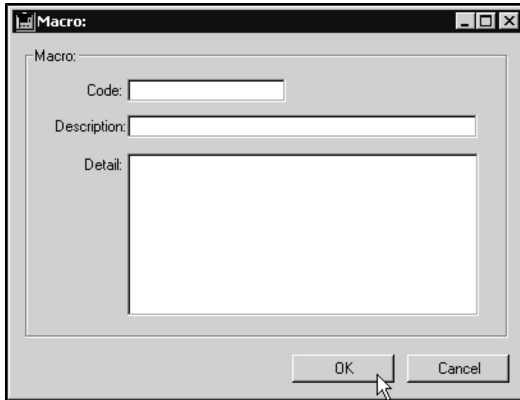
- Type the short code for this Macro into the **Code** field. This code is the abbreviation you will type to invoke this Macro in a text area.

⚠ Do not start the code with "\". The backslash character is used only in word processing or text areas to invoke a macro, 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.
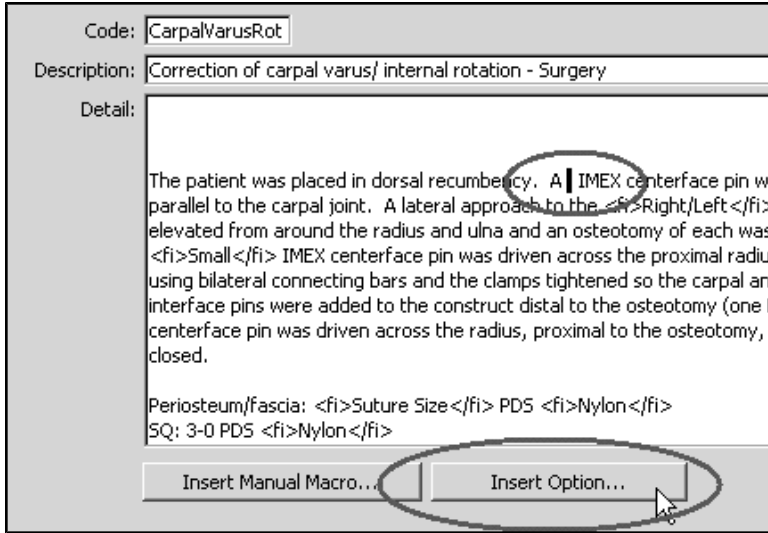
- The **Select Finding Item** dialog displays.
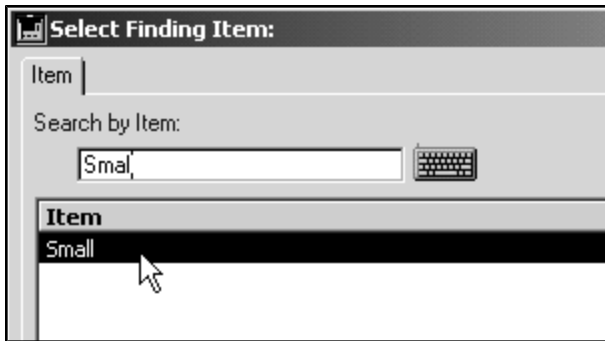
- Search for the item you wish to insert then click it to select it.
- Click **OK**. The option tag will appear in the **Macro Detail** field.
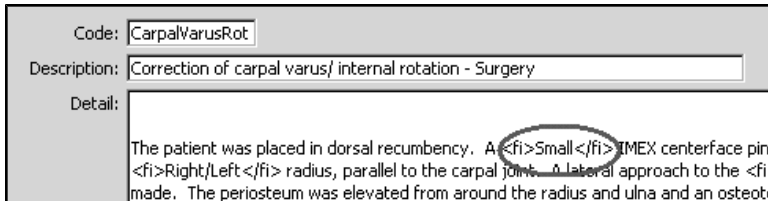
- Click **OK** to save the Macro.

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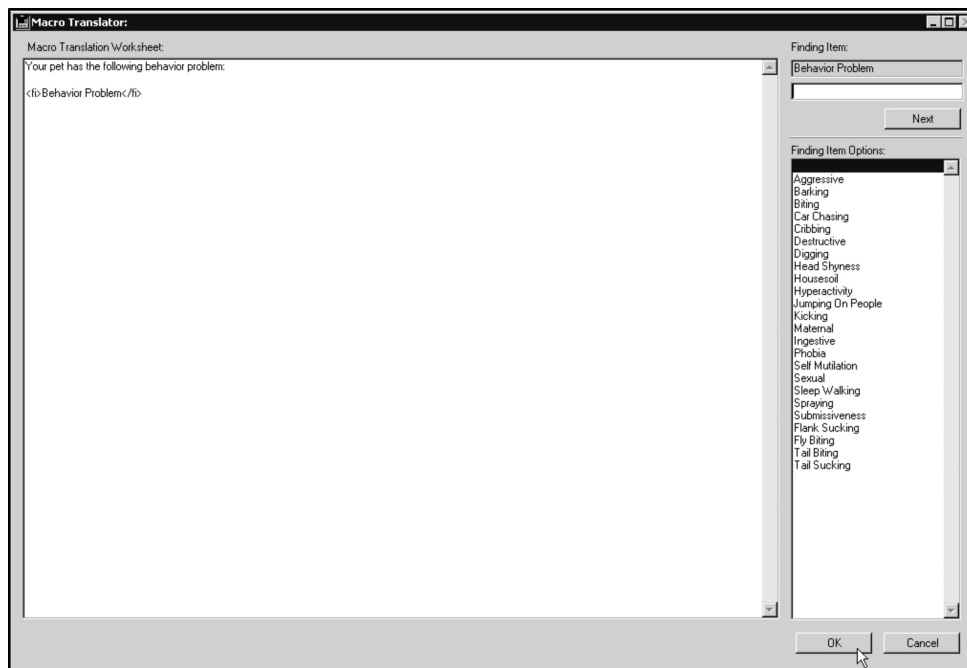
The Macro Translator window allows you to choose which of a Finding Item's options to include as part of the Macro expansion. To use the Macro Translator window:

- 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.

ℹ️ 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.

- From the **Find Dialog** choose **Macros** from the **Search For** drop-down list.
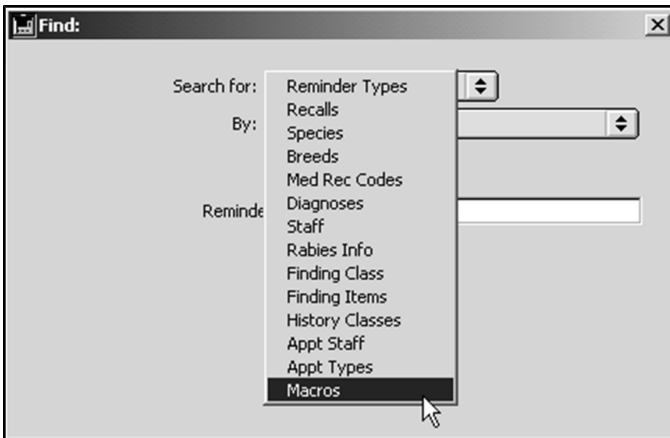
- Click **Add New.**
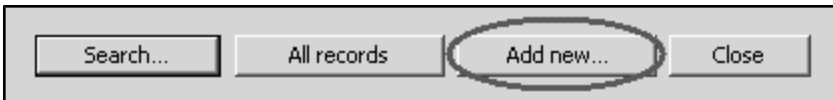
- Click the **Add** button beneath the list of existing Macros. The **Macro** window appears.
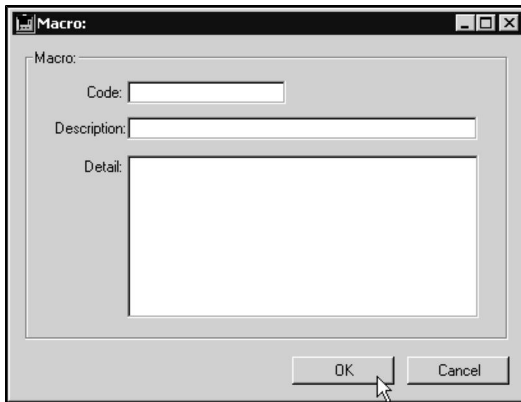
- Type the short code for this Macro into the **Code** field. This code is the abbreviation you will type to invoke this Macro in a text area.

⚠ Do not start the code with "\". The backslash character is used only in word processing or text areas to invoke a macro, 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.
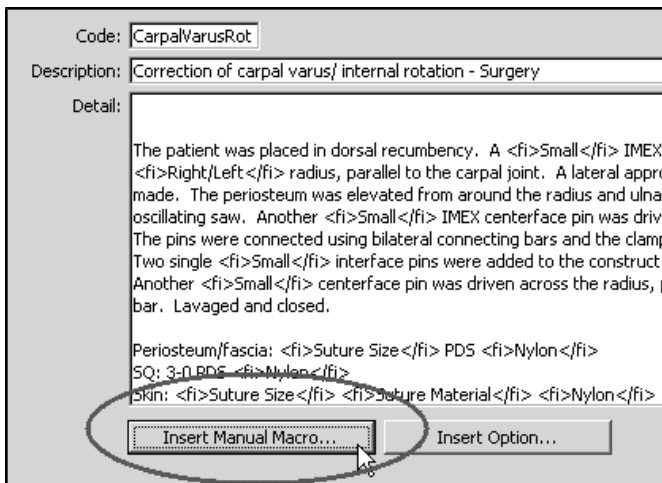
- DVMAX will insert **<mm>yes/no/maybe</mm>** into the **Detail** box. This default tag contains three choices that will appear when you insert this Macro into a word processing document: "yes", "no", and "maybe".
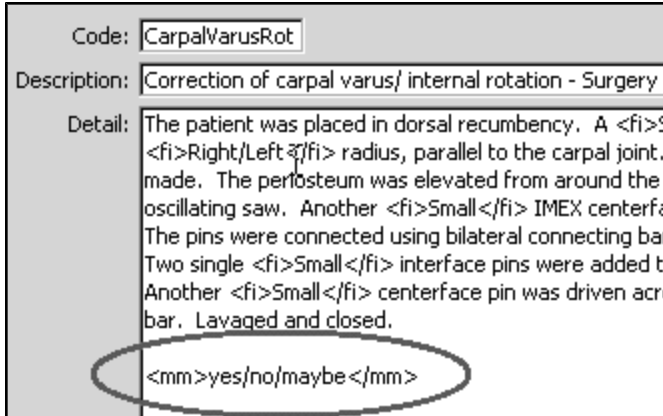
- Edit the default tag as necessary, replacing the 3 default tags with your choice of words and or sentences. Your choices must be separated by the "/" character and cannot contain the "\" character.

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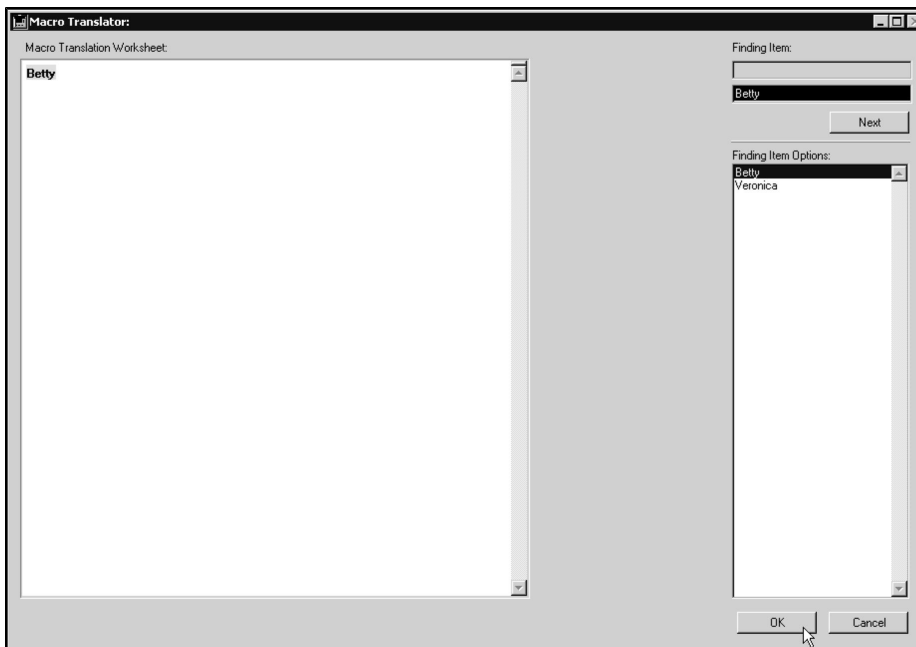
The Macro Translator window allows you to choose which of a Manual Macro's predefined options to include as part of the Macro expansion. To use the Macro Translator window:

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- 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.

 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 **Financials** tab of the **General Management** section 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, send out statements options, monthly sales data, sales tax charged out information 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 use the **Send Out Statements** option from the Financials tab of General Management, but if you have specific clients for whom you want to generate statements, you can do that from the Client list. 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 Inuit Quickbooks Merchant Center from your web browser. You can only use this function if you use Inuit 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).
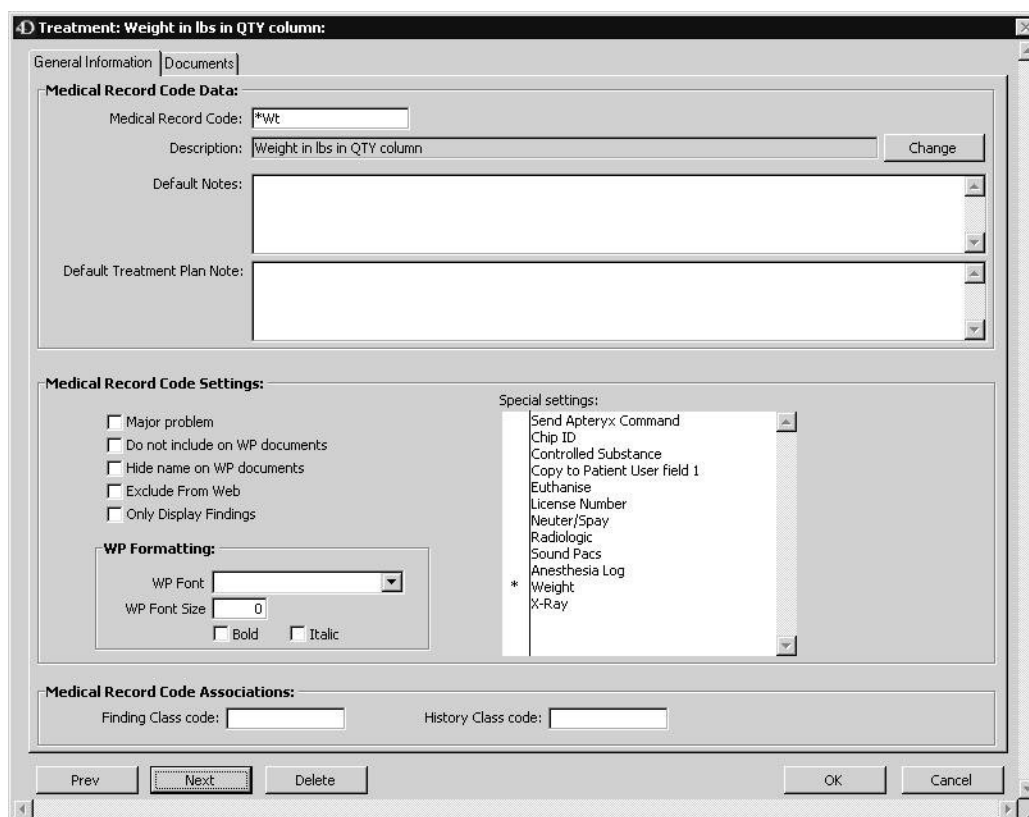
On the General Information tab, there are also settings that determine how the patient record will be affected when this MRC is placed on a patient history. For full information on Medical Record Code settings, see **Creating a Medical Record Code**.

Listing All Medical Record Codes

To list all Medical Record Codes in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu.
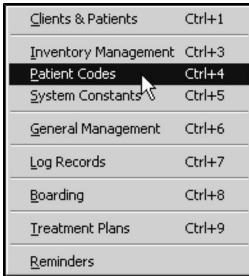
- From the **Find** window choose **Med Rec Codes** from the **Search For** drop-down list.
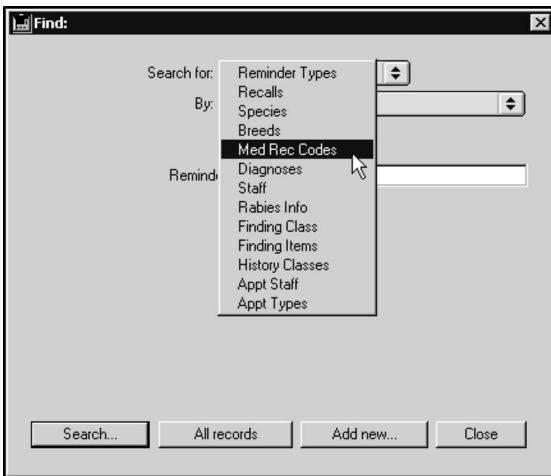
- Click **All Records** at the bottom of the **Find** window.
- The **Medical Record Code List** displays containing all defined Medical Record Codes in DVMAX.

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 indicates if there are any **Special Settings** for a Medical Record Code. See **Special Settings** for more information.
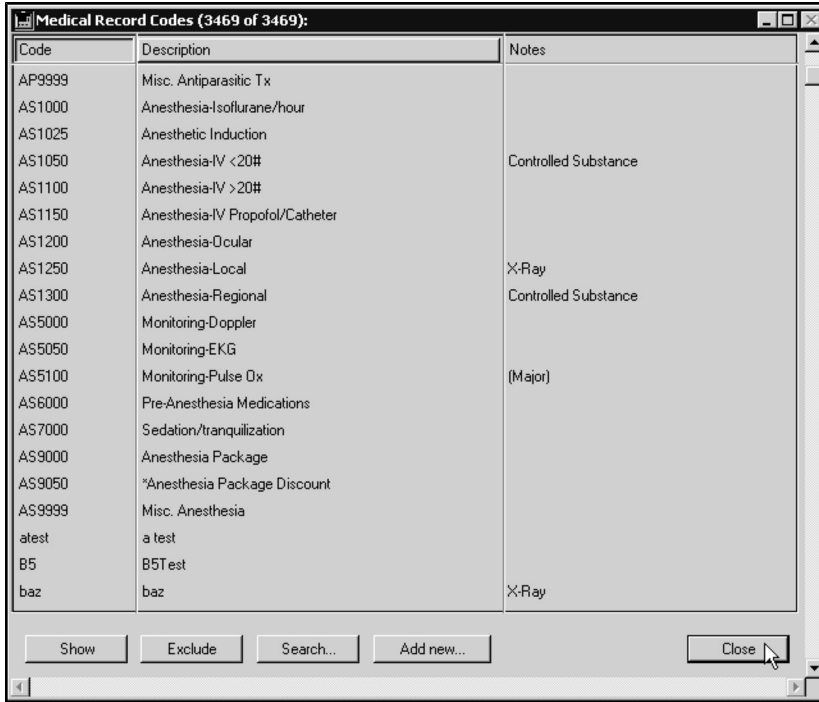
You can sort the **Medical Record Code List** by Code or Description by clicking the appropriate column header.

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.
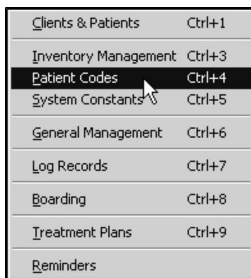
- From the **Find** window, click to select **Med Rec Codes** from the **Search For** drop-down list.
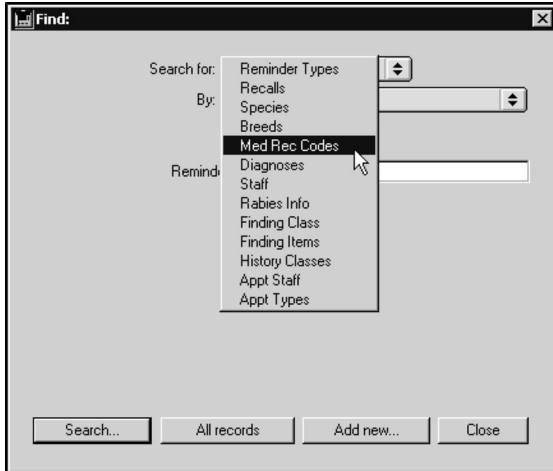
- Choose **Medical Record Code** from the **By** drop-down list to search Medical Record Codes by code.

-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.
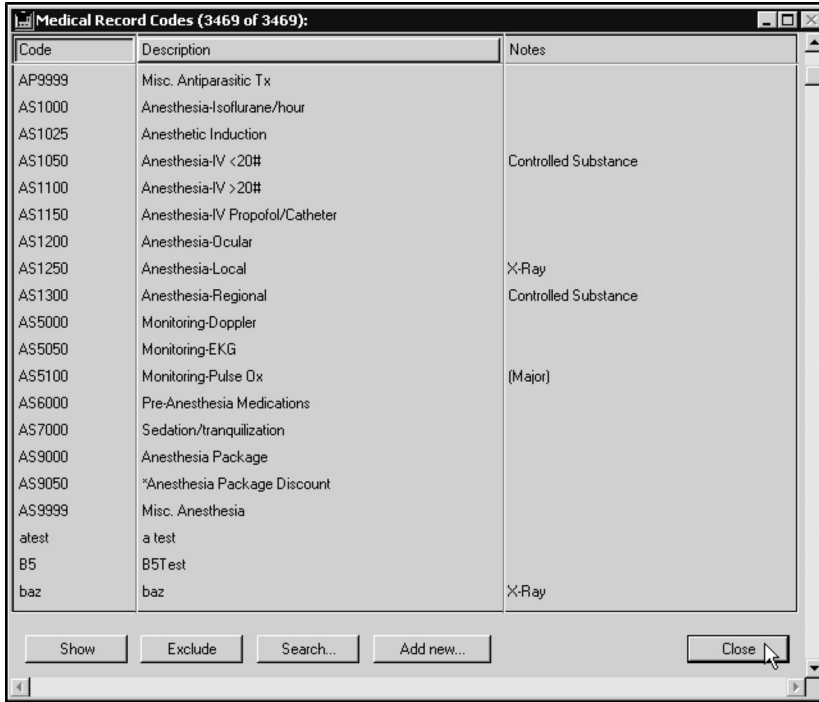
- If there is only one Medical Record Code that matches your criteria, DVMAX will open that Medical Record Code.
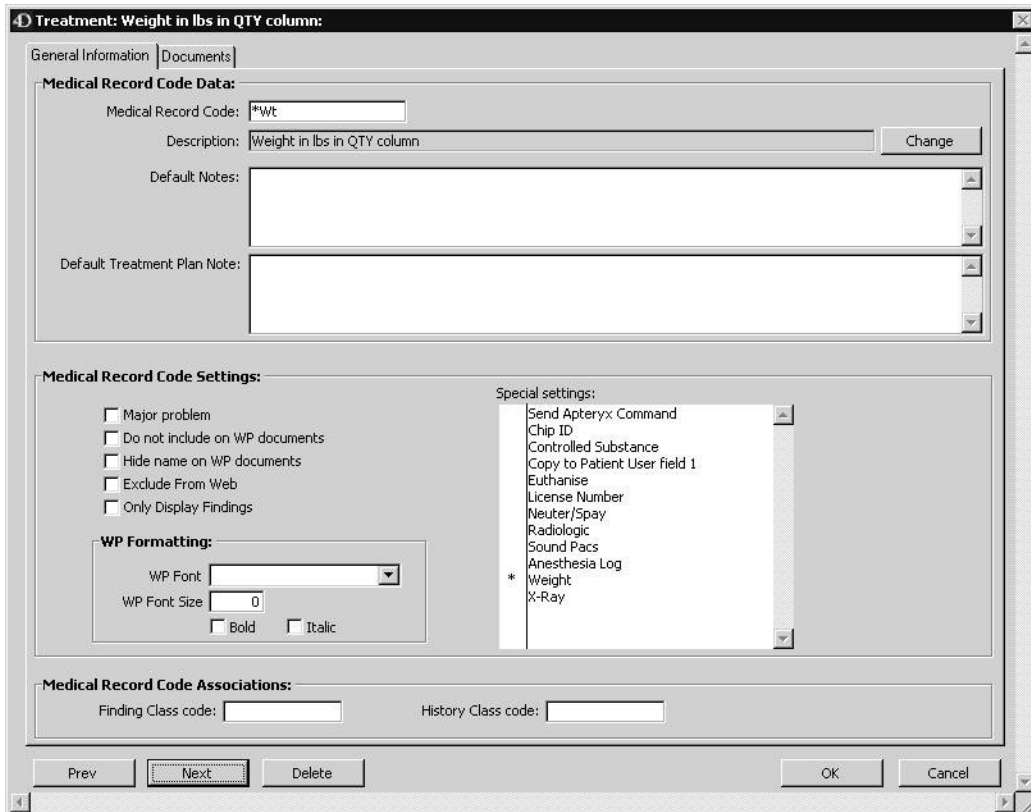
- If there are no matches, DVMAX will display a message to that effect and return you to the **Find** window to search again.

Creating a New Medical Record Code

To create a new Medical Record Code in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu.
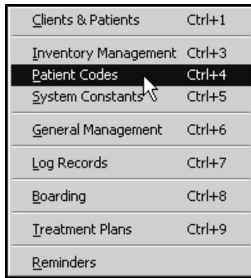
- From the **Find** window, click to select **Med Rec Codes** from the **Search For** drop-down list.
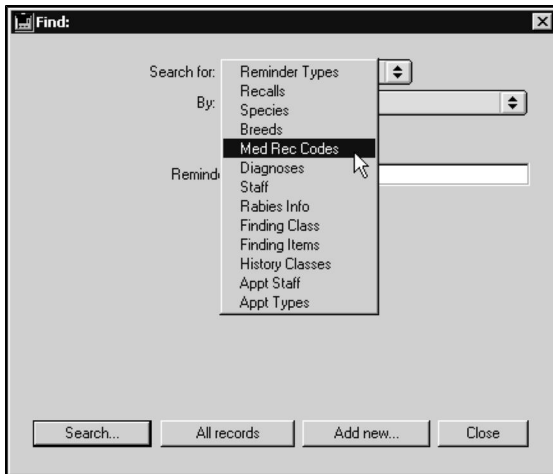
- Click **Add New** at the bottom of the **Find** window.

ℹ️ 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 dialog from patient History 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 MRC Special Setting

ℹ️ The **Send Apteryx Command** is no longer used by DVMAX and may not appear in later versions of DVMAX.

In older versions of DVMAX, if the **Send Apteryx Command** setting is selected, DVMAX will attempt to send an Apteryx command when a Medical Record Entry containing the Medical Record Code is created on a patient history.
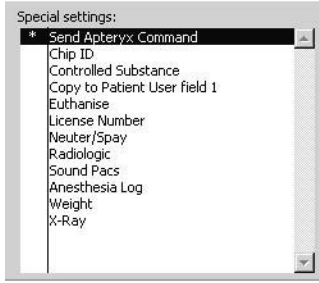
Chip ID MRC Special Setting
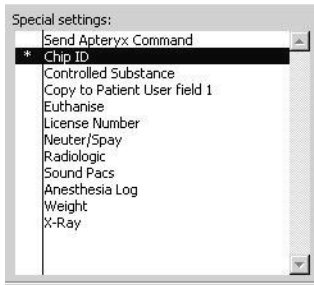
If the **Chip ID** special setting is selected, DVMAX will present the **Chip Number** dialog when you create a Medical Record Entry containing this MRC on a patient history.
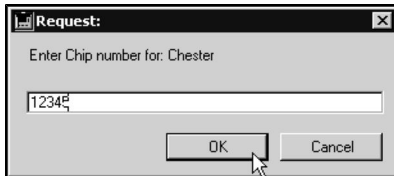
Typing the patient's Chip ID into the **Chip Number** dialog places the Chip ID on the General Information screen of the patient record.
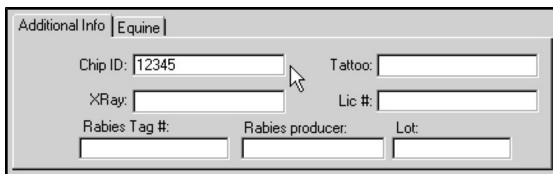
For more information on Chip IDs, see **Working with Patient Records**.

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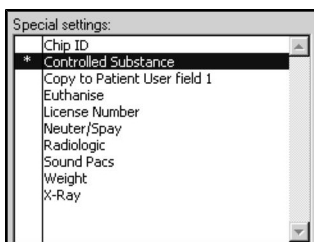
If the **Controlled Substance** special setting is selected, DVMAX will present the **Controlled Substance Log Entry** dialog when you create a Medical Record Entry containing this MRC on a patient history.

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 MRC Special 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.

Euthanise MRC Special Setting
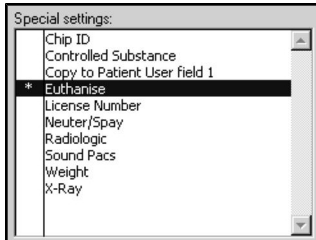
If the **Euthanise** special setting is selected, DVMAX will mark the patient as deceased when you create a Medical Record Entry containing this MRC on a patient history.
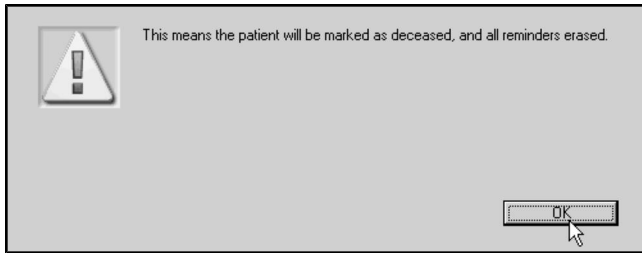
Marking a patient as deceased has several implications in DVMAX. See **Working with Patient Records** for more information.

License Number MRC Special Setting
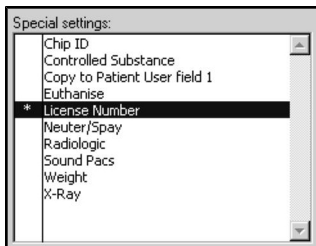
If the **License Number** special setting is selected, DVMAX will present the **License Number** dialog when you create a Medical Record Entry containing this MRC on a patient history.
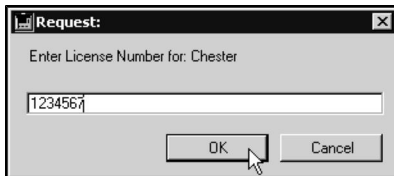
Typing the patient's License Number into the **License Number** dialog places the License Number on the General Information screen of the patient record.

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

Neuter/Spay MRC Special Setting
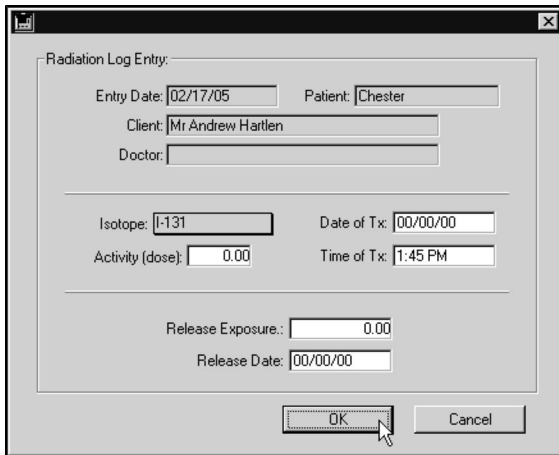
If the **Neuter/Spay** special setting is selected, DVMAX will mark a patient as neutered or spayed when you create a Medical Record Entry containing this MRC on a patient history.
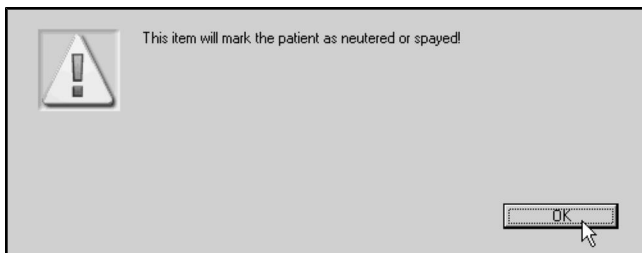
See **Working With Patient Records** for more information.

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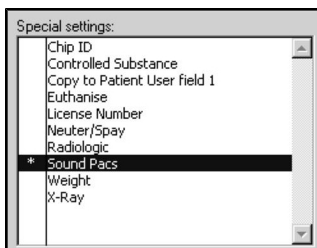
Completing the **Radiological Log Entry** dialog will make an entry in the Radiological log. For more information, see **Log Records**. For more information on Radiology integration in DVMAX, see **Working with Patient Records**.

PACS Link MRC Special Setting
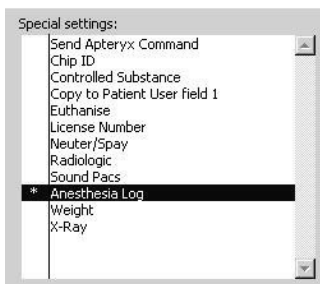
If the **PACS Link** special setting is selected and you are using DVMAX with Purview (formerly SecureRAD), DVMAX will create and send a requisition to the DVMAXLink server when you create a Medical Record Entry containing this MRC on a patient history.

This setting may not be present or functionality may be disabled if you are working with DVMAX version 8.7 or later, where IDEXX Web PACS integration is now supported. The DVMAX PACS Link special setting is **NOT** used by IDEXX Web PACS. See **Integration, Requisitions and Lab Results** for more information on working with IDEXX Web PACS.

Anesthesia Log MRC Special Setting

If the **Anesthesia Log** setting is selected, DVMAX will add an entry in the Anesthesia Log when you create a Medical Record Entry containing this MRC on a patient history.

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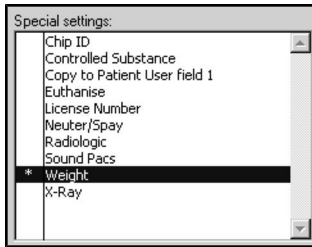
If the **Weight** special setting is selected, DVMAX will set the weight of the patient to the number entered in the **Quantity** field of the Medical Record Entry that contains this MRC. A note will also be made in the Patient **Notes** field with the date of the entry.

ⓘ 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.

X-Ray MRC Special Setting
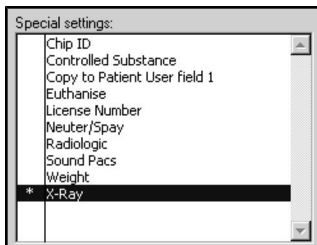
If the **X-Ray** special setting is selected, DVMAX will present the **X-Ray Log Entry** dialog when you create a Medical Record Entry containing this MRC on a patient history.
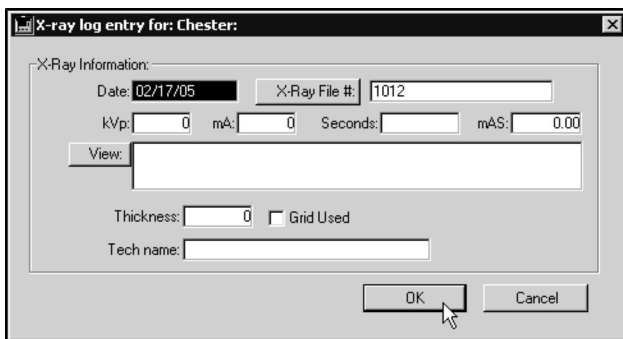
Completing the **X-Ray Log Entry** dialog will make an entry in the X-Ray log. For more information, see **Log Records**. For more information on X-Ray integration in DVMAX, see **Working With Patient Records**.

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 a Medical Record Code

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.
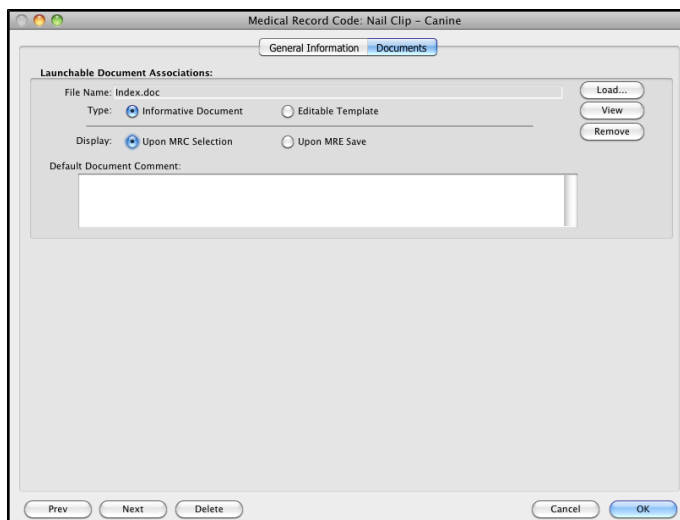
- From the **Documents** tab, specify the document location for the document you wish to link to the MRC under the **Launchable Document Associations** area.

- 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.

ⓘ 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.

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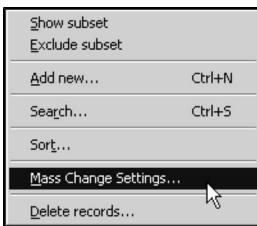
- The **History Entry Setup** dialog appears.
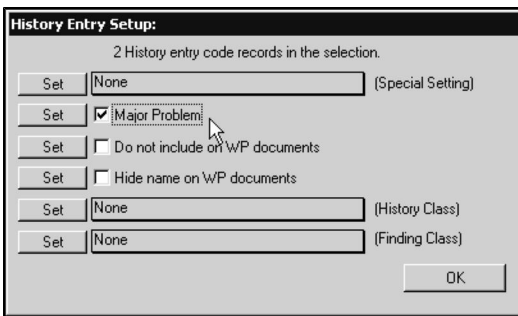
- Choose the settings you wish to change in the **History Entry Setup** dialog. Click the **Set** button for each change you wish to make. A dialog will appear when DVMAX has successfully changed a setting for the selected Medical Record Codes.
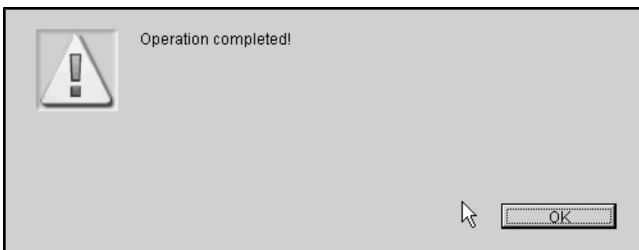
- Click **OK** to close the **History Entry Setup** dialog.

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.
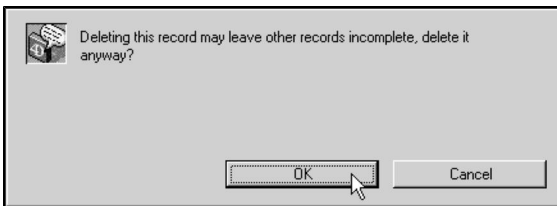
- Click **OK**.

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.

Internal Messenger

The Internal Messenger feature lets you send messages to one or more DVMAX staff. Messenger is accessed from the **Messages** icon on the Command Palette and opens in an internal web area in DVMAX or an external browser window in the same way as the Scheduler and Boarding facilities. You can send and receive chat-type messages or task-based requests within the clinic. Unread message notifications are indicated in bold font on the Messages With list.
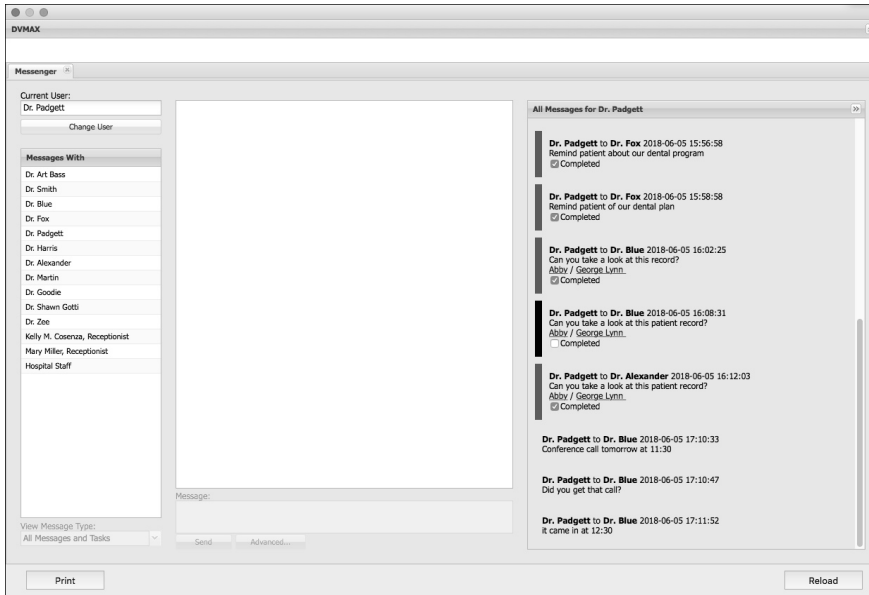
Setting Up Messenger

Before using **Messenger**, you will need to identify which staff will have access to this feature. Only users defined as having access under Staff records can send and receive internal messages. To configure a Staff to use the Internal Messenger feature:

- From the **Section** drop-down menu of the DVMAX main screen, choose **Patient Codes -> Staff**.

- Open a Staff record for which you want to configure Messenger access.

- Select the **Use Messenger** checkbox to allow this staff to use Messenger. This staff name will appear on both the **Messages With** list and as an option on the Current User list in Messenger.

- From the **Color** drop down menu, select a color to be associated with the messages sent and received from this staff.

- Click **OK** to save changes to the Staff record.

Setting the Default Browser for Messenger

By default, Messenger, the Appointment Scheduler and the Boarding Scheduler open in a web area within DVMAX. You can choose to have DVMAX open these in an external browser. There is a single setting controlling all of these facilities.

To change the default browser for Messenger, Appointments and Boarding:

- From the **File** menu on the DVMAX main window, choose **Preferences**.

- From **Preferences**, choose the **Assorted Prefs** tab.

- In the Appointment Scheduler/Boarding area, use the **Open With** drop down menu to select the browser you would like DVMAX to use to open Messenger, Appointments and Boarding. This can be Internal (default) or another browser you have available on your terminal (such as Edge, Firefox or Chrome).

Opening Messenger from the Command Palette

You can access Messenger quickly by selecting the **Messages** icon from the **Command Palette**.
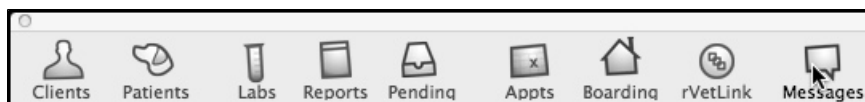
If you cannot see the **Command Palette**, select **Command Palette** from the **Window List**.

When you first open Messenger, you will be asked to select the Current User. This identifies who will be using Messenger at this terminal (and represents the sender for any messages you send during the session).
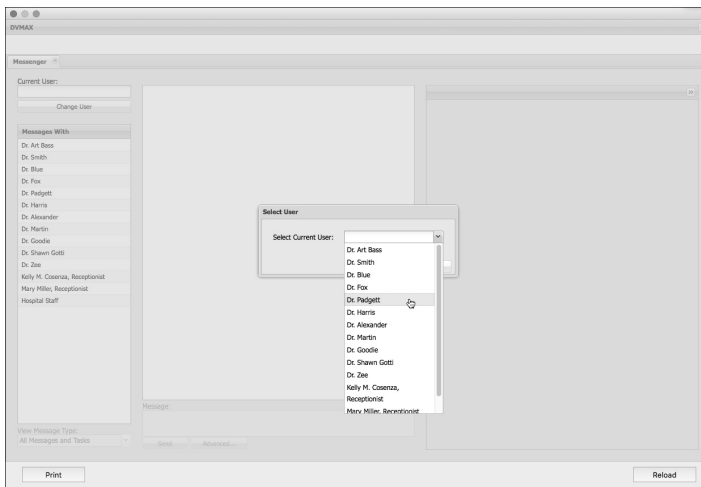
The Current User can be changed at any time from Messenger by clicking the Change User button.
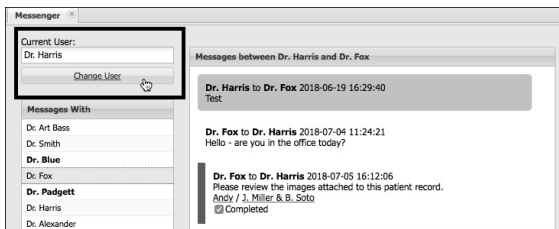
About the Messenger Window

The Messenger window is made up of a few sections, including the Messages With staff list, the **Messages Between** current messages area, and the **All Messages** read-only view.
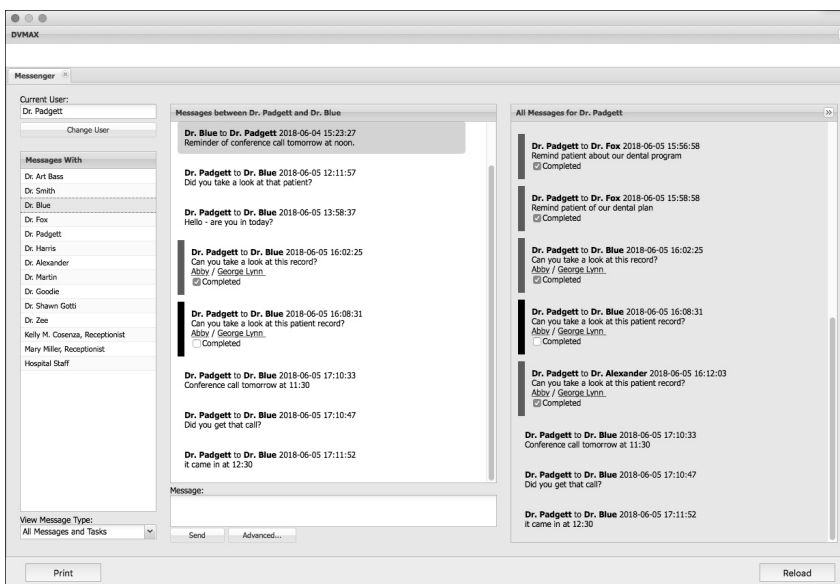
Current User

The Current User is the person associated with messages sent from the selected terminal. You can change the user by clicking **Change User** and selecting a new user from the drop down list. Since more than one person may use a terminal, be sure to check the Current User before you start working with Messenger.
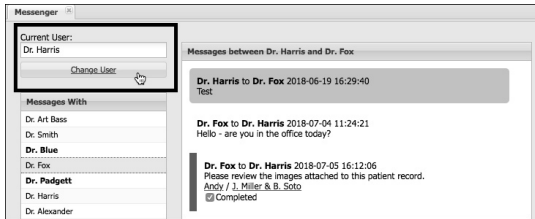
For a staff to appear on this list, the **Use Messenger** checkbox must be selected on the associated DVMAX **Staff** record. See *Setting Up Messenger*.

Messages With List

The **Messages With** list displays a list of staff with whom you can communicate via Messenger. Select one or more names from the list to identify who you want to message.
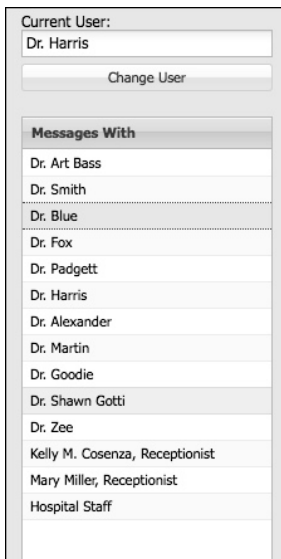
Messages Between Panel

The Messages Between panel on the left side of the messenger page is the conversation view between you (current user) and the staff you have selected from the **Messages With** list. At the top of the Messages Between area you will see text that indicates the users included in the conversation. As with most messaging applications, the most recent message is at the bottom.
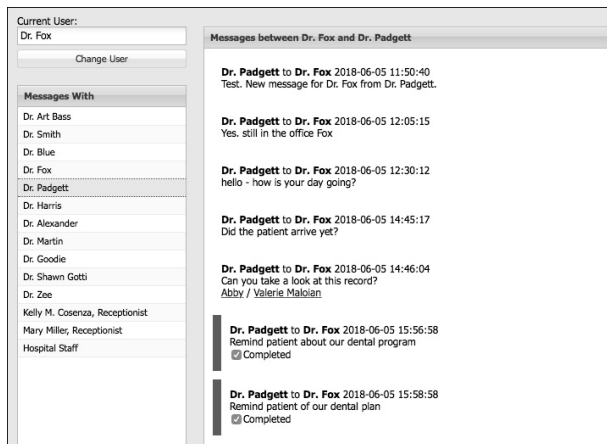
Message Field (Enter Your Message)

The **Message** field is located below the **Messages Between** area. Select the person you want to message from the **Messages With** staff list, type your message in the Message field and click **Send**. To add a link to a patient or client record, or to create a task-based message, click Advanced. See *Advanced Message Features* for more.
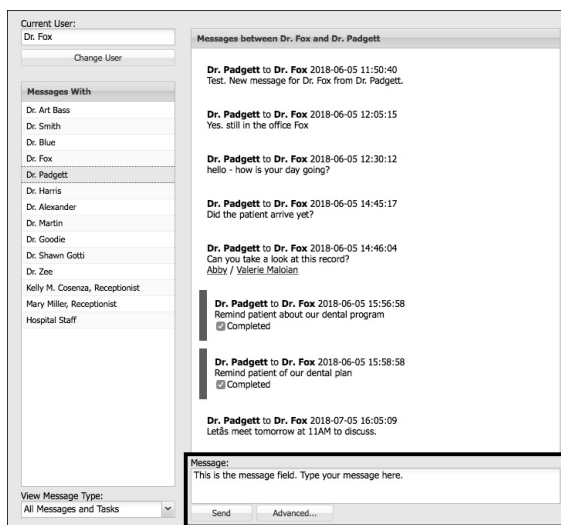
Send Button (Send Your Message)

Once you have selected the staff you wish to message, type your message in the Message field and click **Send.** Your message will be delivered to the selected user(s). You can also choose to send your message from the **Advanced** dialog. See *Advanced Messenger Features* for more detail.

Advanced Button (Access Advanced Messenger Features)

Access additional messaging options, including Task-based messaging and patient/client links, from the **Advanced** send message dialog. See *Advanced Messenger Features* for more detail.

Message Type Filter

The **Message Type** filter lets you choose what type of messages to view in the Messages Between area. You can choose to display both Messages and Tasks (default view), Messages Only, Tasks Only or Uncompleted Tasks Only.
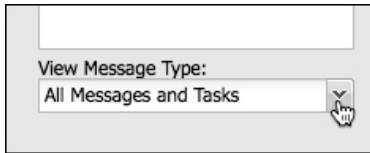
All Messages Panel

The **All Messages** panel of Messenger is a read-only view of ALL messages between you (the current user) and any staff. Scroll this list for a complete history of messages and tasks sent or received from all staff, displayed in chronological order, with the most recent messages at the bottom.
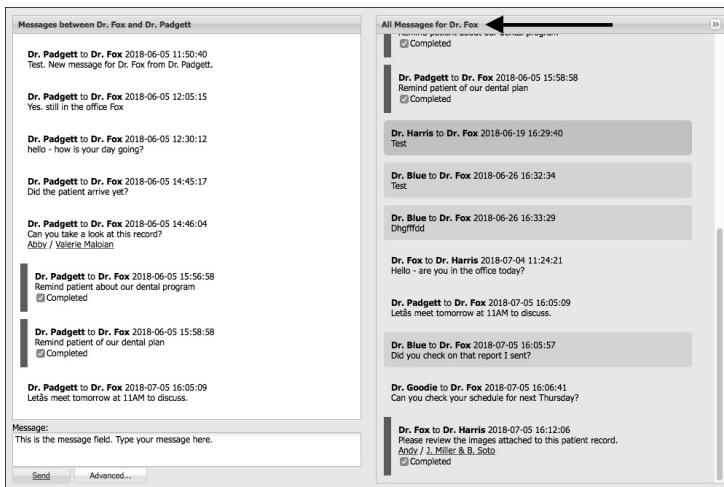
Working with Messenger: A Quick Overview

Messenger is an internal message board that lets you send and receive direct messages.

To send a message:

- DVMAX identifies the sender as the **Current User**, noted in the field in the top left of the Messenger window. Select **Change User** if you want to change the **Current User**.

- Select who you want to message from the **Messages With** list. You can select any number of recipients.

- Type your message in the **Message** field and click **Send**.

- To send a message with a link to a specific patient/client record, select who you want to message from the **Messages With** list and click **Advanced**. See

Advanced Message Features for more.

Message Types: Simple and Task Messages

You can use Messenger to send a basic chat-type message or you can create a message associated with a task. Both types of messages are quick and easy to send and can be delivered to one or more users.

Simple Message – A Simple message is a basic, chat-style message. You can include a link to a patient or client record in a simple message using the **Advanced** options, or you can type your message in the message field of the main Messenger window and click **Send**.

Task Message – A task-based message is created from the **Advanced** Send Message dialog. Task messages let you associate a request with your message. When the task is completed, the staff can click the Completed checkbox included as part of the task message. You can include a link to a patient or client record in a task message.

Send a Message to a One Staff Member

To send a message to a single staff or user:

- DVMAX identifies the sender as the name of the **Current User**, noted in the field in the top left of the Messenger window. Always check the name in the current user field if more than one person uses your terminal. Select **Change User** if you want to change the **Current User**.

- From the **Messages With** list, click to select the staff you want to message.

- Type your message in the **Message** field and click **Send**.

-OR-

- To send a message with a link to a specific patient/client record, select who you want to message from the **Messages With** list and click **Advanced**. See *Advanced Messenger Features* for more.
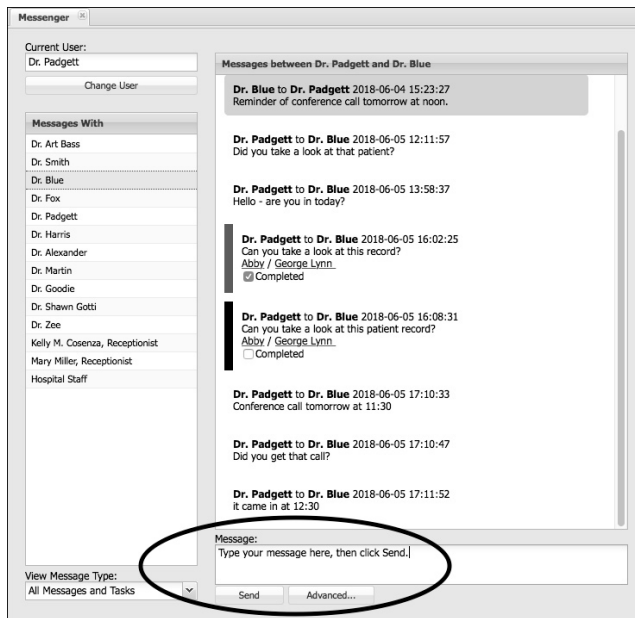
Send a Message to Multiple Staff

To send a message to multiple users:

- DVMAX identifies the sender as the name of the **Current User**, noted in the field in the top left of the Messenger window. Always check the name in the current user field if more than one person uses your terminal. Select **Change User** if you want to change the **Current User**.

- From the **Messages With** list, click to select the staff you want to message.

- To selected an adjacent set of staff from the list, click the first staff on the list you want to message, then use Shift + click to select the last user in the group you want to message. To select a non-contiguous set of users, click to select a staff, then use Control + click on the next staff you want to select from the list. Repeat until you have selected all staff who you want receive the message.
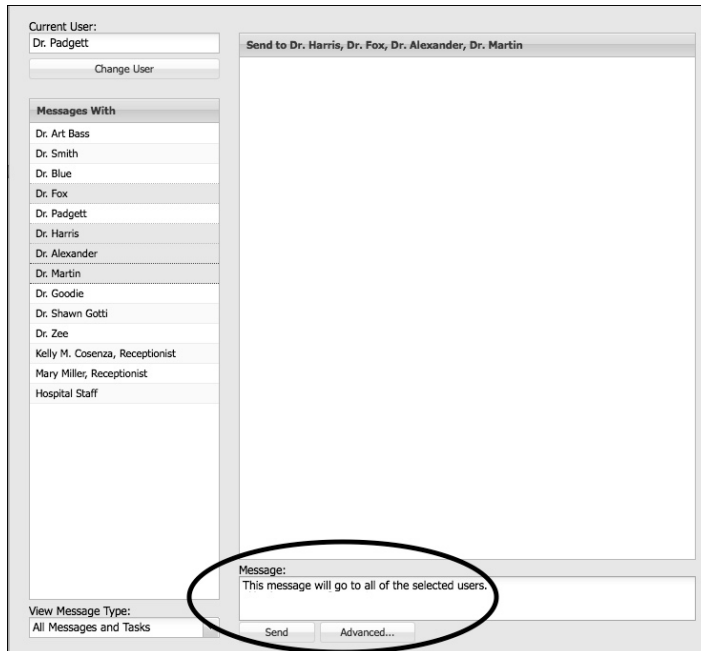
- To send a message with a link to a specific patient/client record, select who you want to message from the **Messages With** list and click **Advanced**. See *Advanced Messenger Features* for more.

Advanced Messenger Features

Messenger includes some advanced options that let you include more in your messages, including linking client and patient records and/or creating a task-based message. You access Advanced features by clicking the **Advanced** button from the Messenger window. From the Advanced **Send Message** dialog, you can create simple messages or task-based messages and link those messages to a client or patient record.

Create a Task-Based Message

To create a task-based message:

- DVMAX identifies the sender as the name of the **Current User**, noted in the field in the top left of the Messenger window. Always check the name in the current user field if more than one person uses your terminal. Select **Change User** if you want to change the **Current User**.

- Select who you want to message from the **Messages With** list. You can select any number of recipients.

- Click the **Advanced** button.

- From the advanced **Send Message** dialog, type your message in the **Message** field.

- From the **Message Type** drop down, select **Task**.

- To add a link to a patient and client record, use the Linked Patient option to search for the patient and client you want to link in your message. Click **Select Linked Patient**. This will create a link to both the patient and associated client in the message you send.

- Click **Send Message**.

Link a Client or Patient Record to a Message

To link a client or patient record to your message or task:

- DVMAX identifies the sender as the name of the **Current User**, noted in the field in the top left of the Messenger window. Always check the name in the current user field if more than one person uses your terminal. Select **Change User** if you want to change the **Current User**.

- Select who you want to message from the **Messages With** list. You can select any number of recipients.

- Click the **Advanced** button.

- From the advanced **Send Message** dialog, type your message in the **Message** field.

- From the **Message Type** drop down, choose **Message** (to send a simple message) **Task**.

- From the Select Client/Patient list under the Linked Patient area, use the **Client** and **Patient** filters to search for the record you want to link in your message. These filters work the same way as the Client and Patient filters when creating an appointment.
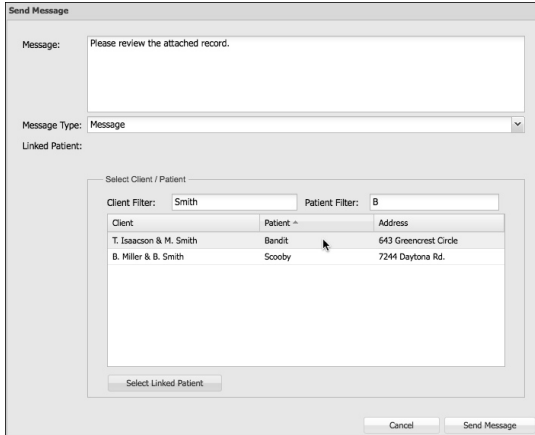
- From the list of records that match your search criteria, click to highlight the record you want to link.

- Click **Select Linked Patient**. This will create a link to both the patient and associated client in the message you send.
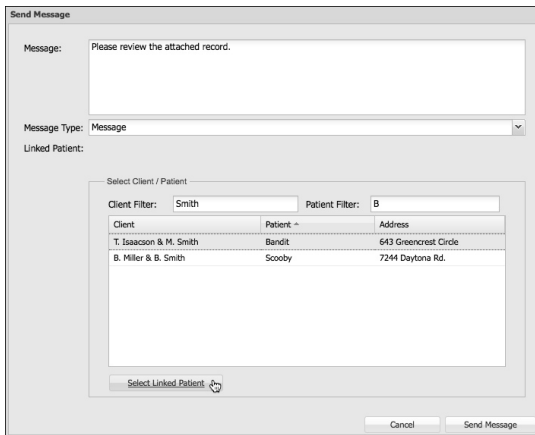
- Click **Send Message**.

New Message Notification in Messenger

Bold font in the **Messages With** list indicates that there are unread messages. To read pending messages, click a name that is shown in bold under the User list. Repeat for each name that appears in bold under the **Messages With** list. In the example pictured below, Dr. Fox (the **Current User**) has messages pending from 3 users – Dr. Blue, Dr. Goodie and Dr. Padgett. Clicking on those staff will display the messages to Dr. Harris from each of those 3 staff.
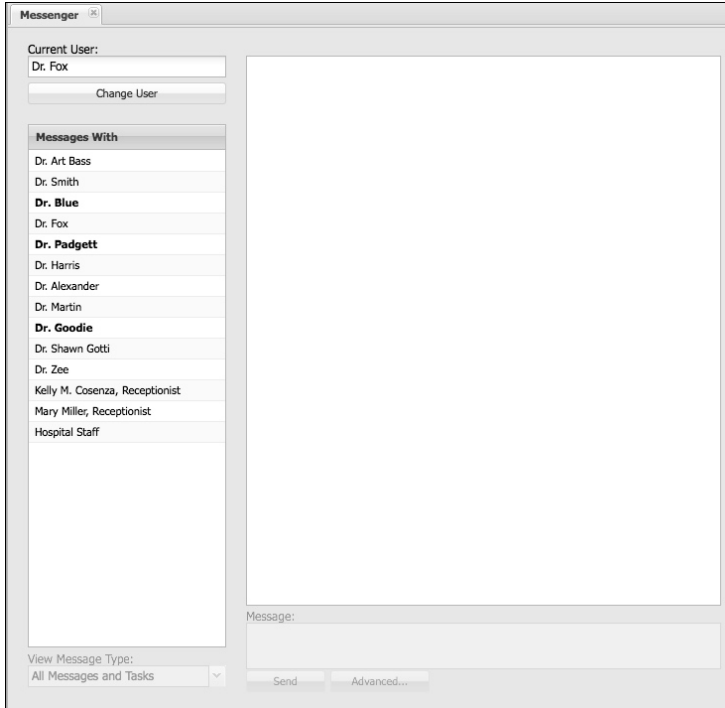
Completing a Task

Task-type messages look different than simple messages. A new task message includes a black bar to the left of the message and a Completed checkbox at the bottom of the message.
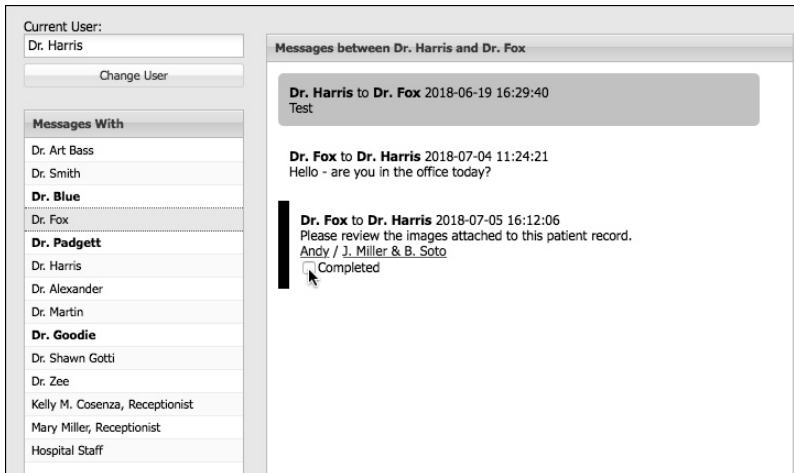
When the task associated with the message is completed, click the Completed checkbox. The black bar beside the message will turn green and the checkbox will be filled. This marks the task as complete.

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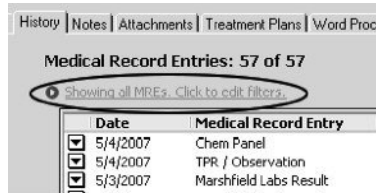
ℹ CONTROL+R (COMMAND+R on the Macintosh) is a keyboard shortcut for activating the MRE Filter Controls.

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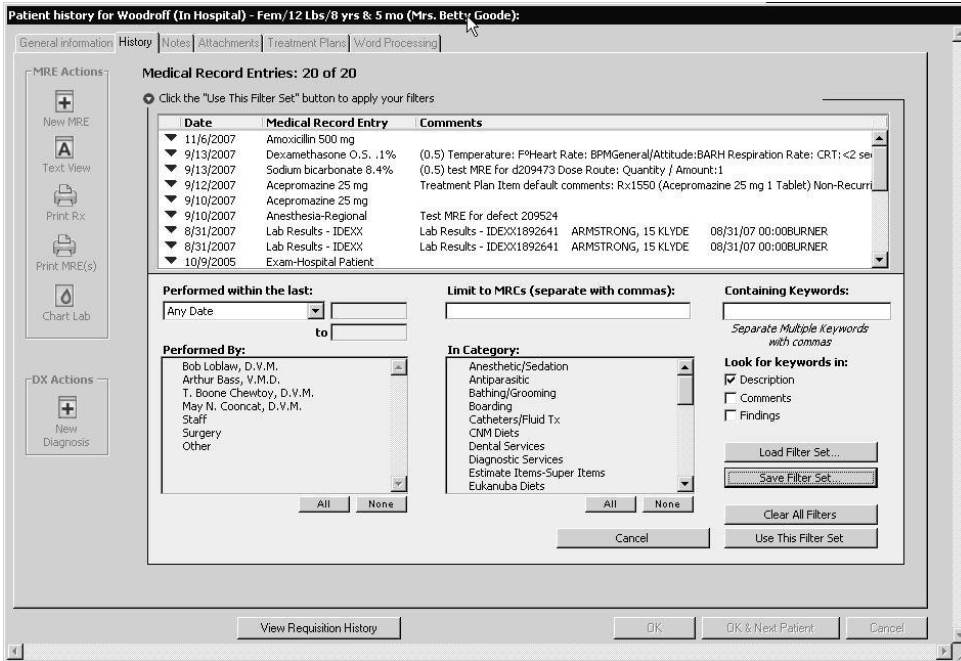
- Choose a date range from the **Date** drop-down menu.
- Click **Use This Filter Set**.

- 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.
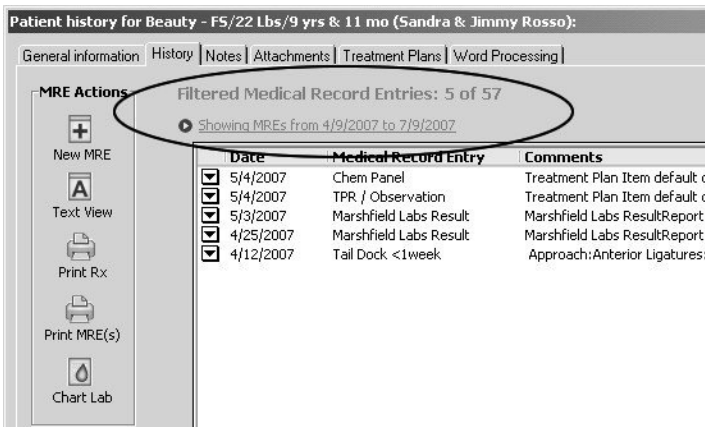
The MRE Filters: An Overview

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**.

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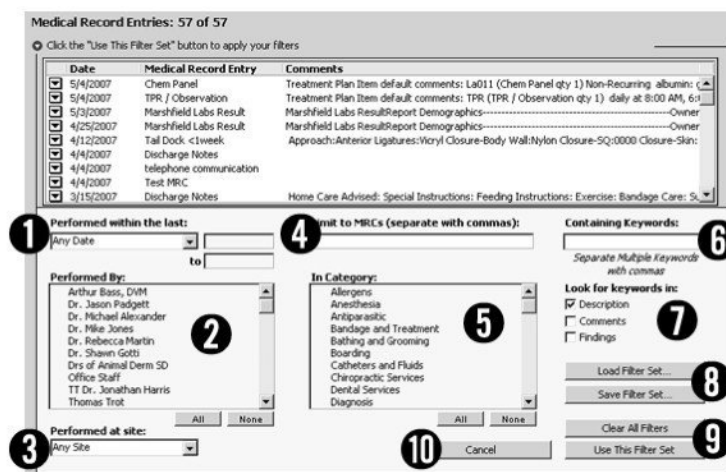
4. Medical Record Code Filter: You can type as many Medical Record Codes as you need into this field. Separate each code with a comma. You can use the wildcard operator in this field: for instance, "rx@" will match any Medical Record Entries in the Patient's history that begin with the letters "rx".

ℹ️ 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".

ℹ️ 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.

ℹ️ 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)
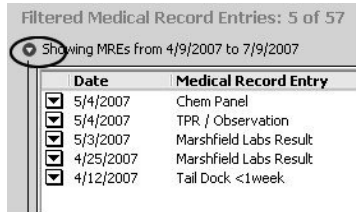
-OR-

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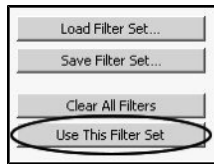
ⓘ CONTROL+R (COMMAND+R on the Macintosh) is a keyboard shortcut for deactivating the MRE Filter Controls. This key combination has the same effect as clicking **Apply Filters**, described above.)

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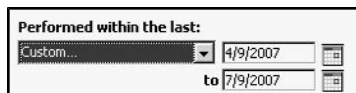
ⓘ Standard DVMAX date shortcuts can be used in the Start and End date fields. You can also click the Calendar icon beside either date field to choose a date from a calendar.

The MRE 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.
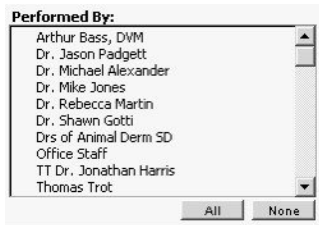
- When a Staff member has been selected, an asterisk (*) appears beside their name.
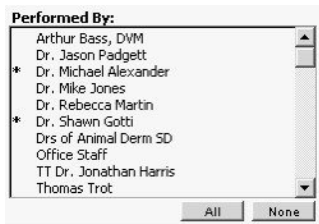
ⓘ Only Staff currently marked as Doctors or Providers appear in the Staff list. If an MRE was performed by a Staff member no longer listed as a Doctor or Provider (most likely because they are no longer employed at your Practice), you can catch this item in a filter only by using the last item in the Staff list, "Other".

The MRE Staff 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 for Patient History

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.

Limit to MRCs (separate with commas):
rx@,sx@

- 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.

ℹ️ 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.

ℹ️ 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 MRE 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.

In Category:
Allergens
* Anesthesia
Antiparasitic
Bandage and Treatment
* Bathing and Grooming
Boarding
Catheters and Fluids
Chiropractic Services
Dental Services
Diagnosis
[All] [None]
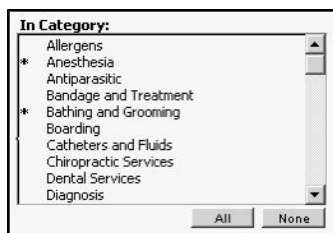
⚠️ Depending on the setup of your datafile, it is possible for MREs not to be included in any Category at all. If you suspect this is the case, try including "Uncategorized" (the last item in the Category list) in the Filter, or use a Medical Record Code filter to include the MRE you need.

The MRE Category 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** but-

tons 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 MRE 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.
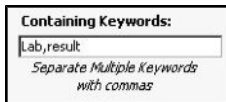
- Click the **Description, Comments,** and **Findings** checkboxes as desired.
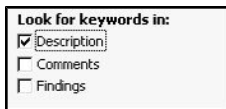
- Click **Use this Filter Set** to see the results of your keyword filter.
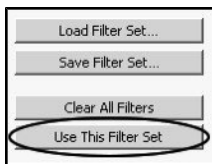
ℹ️ You can use the wildcard operator to include multiple keywords in your filters. For example, using an keyword filter of "recover@" will find an MRE that contains either "recovering" or "recovery". You can use the wildcard operator only at the end of an keyword filter term.

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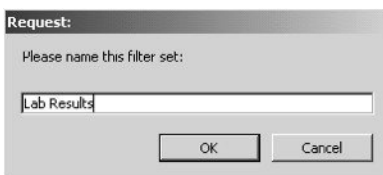
- Type a name for your filter set. Names can be any length, and may include spaces.
- Click **OK**.

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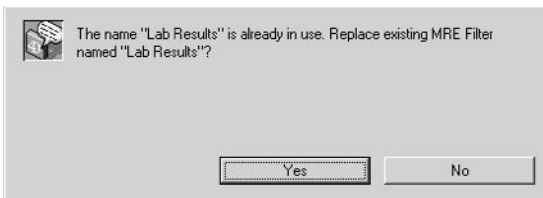
- Click **Yes** to replace the existing filter set.
- Click **No** to return to the **Save Filter Set** dialog and type a new name.

Loading a Saved MRE Filter Set

To load a saved filter set:

- Click **Load Filter Set**.

- The **Saved Filter Sets** dialog appears
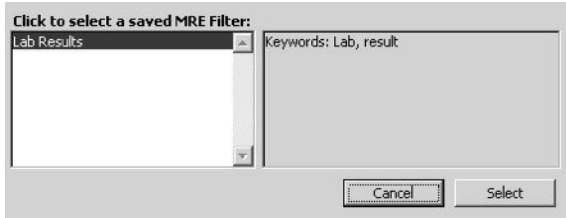
- Click a filter set from the list on the left hand side of the dialog to choose it.

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 MRE 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 MRE Filters Through DVMAX 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.
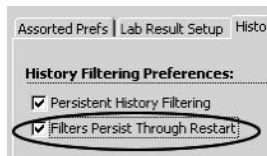
Clearing (Turning Off) MRE Filters

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

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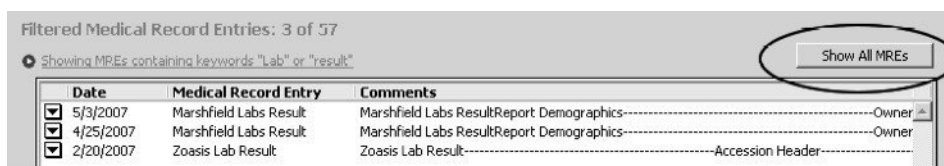
-OR-

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

```
Load Filter Set...
Save Filter Set...
Clear All Filters
Use This Filter Set
```

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

```
Load Filter Set...
Save Filter Set...
Clear All Filters
Use This Filter Set
```

How MRE 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).

MRE 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.

- 713 -
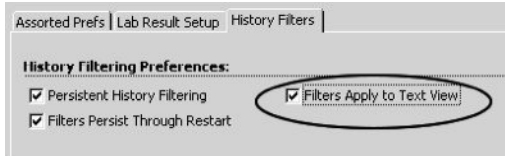
- Click **OK** to close the **Preferences Dialog**.

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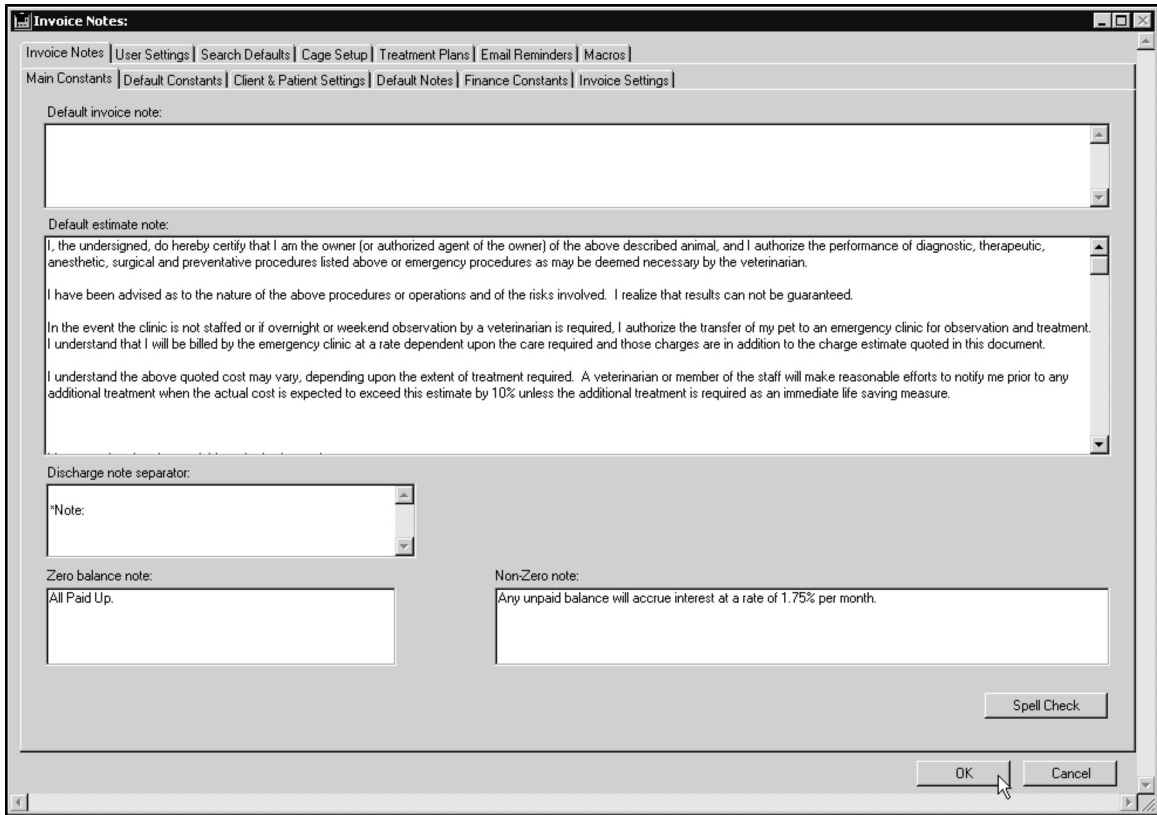
See the **Invoicing** section of this reference for more information.

Reference Number for Finnish Invoices

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

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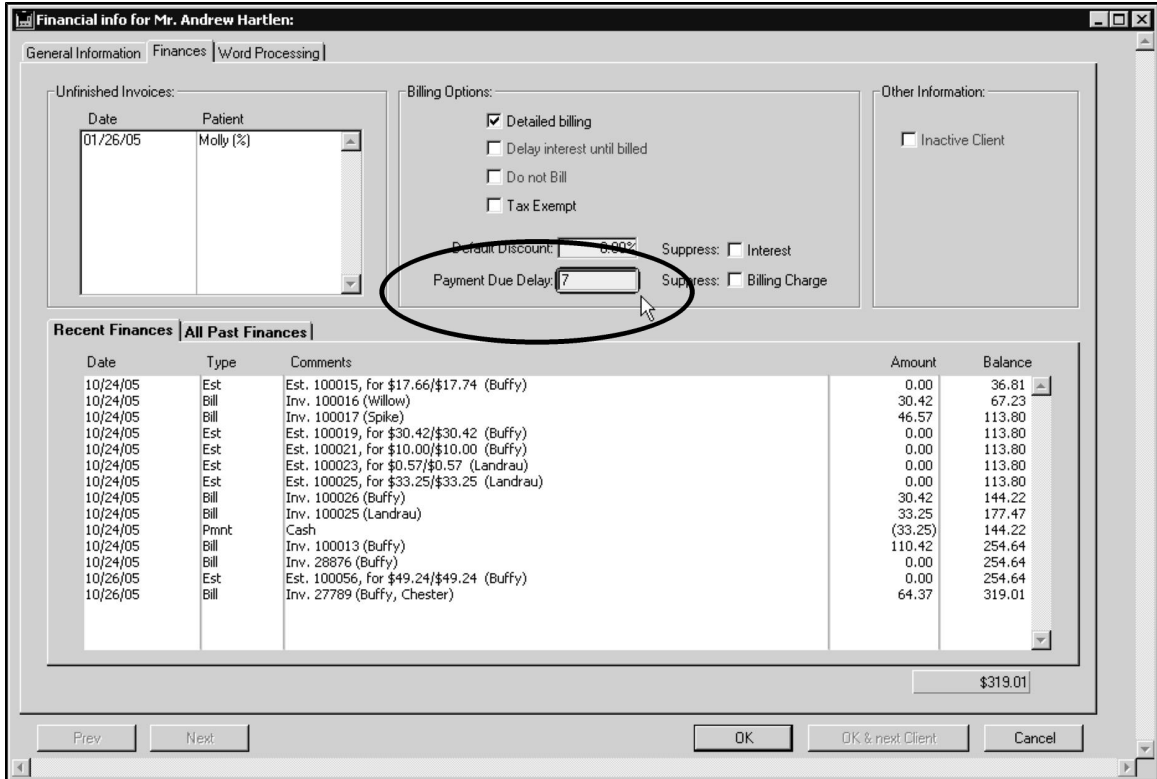
- Click **OK** to save your changes.

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. 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 functionality, 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.

An Overview of the Patient Record

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

The **General Information** tab on a Patient record contains vital statistics about a particular patient, information about the patient's owner(s) 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** tab 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 History tab also lets you view requisition history, lab results, VetConnect PLUS results directly from VCPlus and view diagnostic images via Web PACS.

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

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

The **Treatment Plans** tab on the Patient record lists any standard or customized Treatment Plans and associated To Do items for a patient.

The **Word Processing** tab 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** panel was removed in DVMAX version 8.7. It was replaced by a **WebPACS** button on the Patient **History** tab. The button offers the same functionality as the DICOM tab. Contact 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 area of the Patient record with which you want to work.

-OR-

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

```
Patient  Reminders  History  WP  Do
✓ General information      Ctrl+G
  Patient History          Ctrl+H
  Patient Notes            Ctrl+N
  Word Processing          Ctrl+L
  Patient Images
  Prescription Label...    Ctrl+P
  Print Patient file Label
  Print Referral addr Label
  Create an Invoice...     Ctrl+I
  Change file number...    Ctrl+F
  Jump to Owner \ OK       Ctrl+J
  Assign to new Owner...
  Combine Patients...
  Set Alert Message...     Ctrl+Y
  Create a Memo...         Ctrl+M
  Mark as Deceased...
  Revive Patient...
  Set\Find Appointment...  Ctrl+S
  Set\Find Boarding...     Ctrl+B
  Set Split Ownership...
  Delete this Patient...
```

Search for Patient Records

To find a Patient record:

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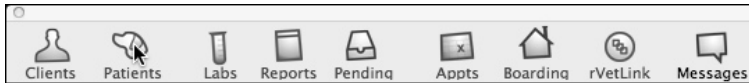
-OR-

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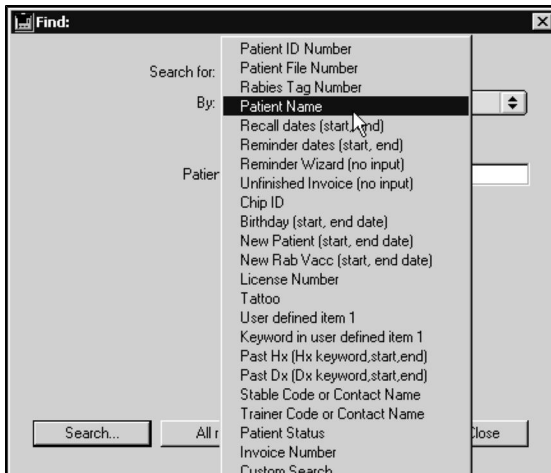
- If necessary, type an appropriate search term into the field below the **By** drop-down list. See *Search Criteria* for more information on appropriate search terms. The label of this field is determined by your choice from the **By** drop-down list.

- If your practice has multiple sites, choose a site from the **Site** drop-down list.

- Click **Search.**

 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.

- 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.
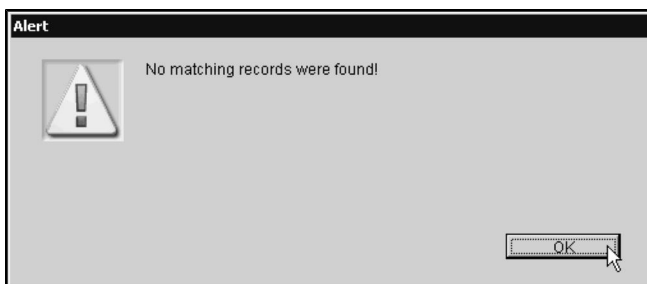
Patient Search Criteria

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

```
Patient ID Number
Patient File Number
Rabies Tag Number
Patient Name
Recall dates (start, end)
Reminder dates (start, end)
Reminder Wizard (no input)
Unfinished Invoice (no input)
Chip ID
Birthday (start, end date)
New Patient (start, end date)
New Rab Vacc (start, end date)
License Number
Tattoo
Markings:
Keyword in Markings:
Past Hx (Hx keyword,start,end)
Past Dx (Dx keyword,start,end)
Stable Code or Contact Name
Trainer Code or Contact Name
Patient Status
Invoice Number
Custom Search
General...
```

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 (i.e.; 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.
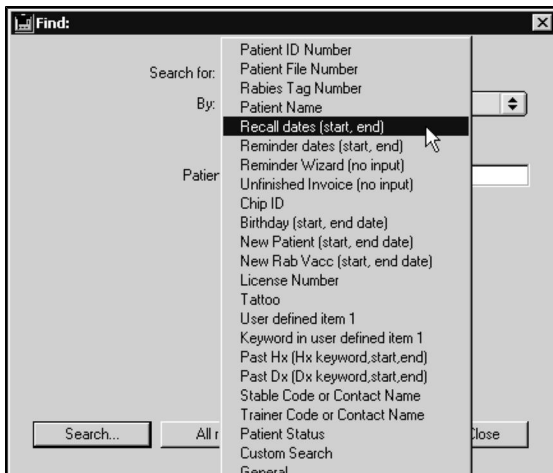
- If necessary, edit the start and end dates into the **Enter Date Range** field. DVMAX inserts the current date as both the start and end date by default.

- 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.

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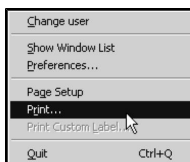
- The **Printing Patients** dialog appears.
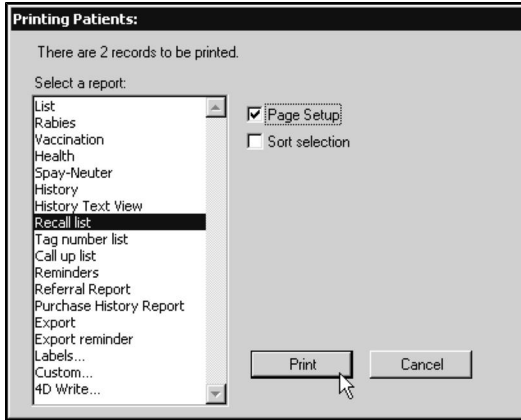
ⓘ By default, the list is sorted by Doctor Code, Patient Name. If you select **Sort Selection** in the printing dialog, then that sort order is used instead of the default sort order.

- Click to select **Recall List** from the list of available reports.

- Click **Print**. The **Recall List** report will print.

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.
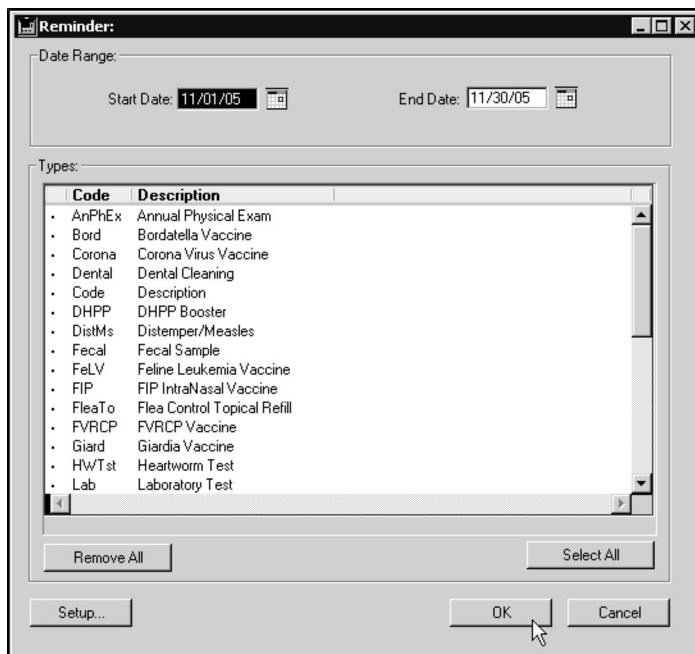
Search By Unfinished Invoice (No Input)

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. What appears in this field on the Patient record and on the Search By list 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 on the Patient record and on the Search By list 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 ad 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.

Search By Boarding

Use this search option to return a list of all patients currently boarding.

Search By Appointment Dates

Use this search option to return a list of patients with appointments in the date range specified. You can narrow the search by entering a staff name in the search parameters.

Custom Search

The Custom search for patients allows you to create a very specific search based on multiple criteria (e.g.; 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.
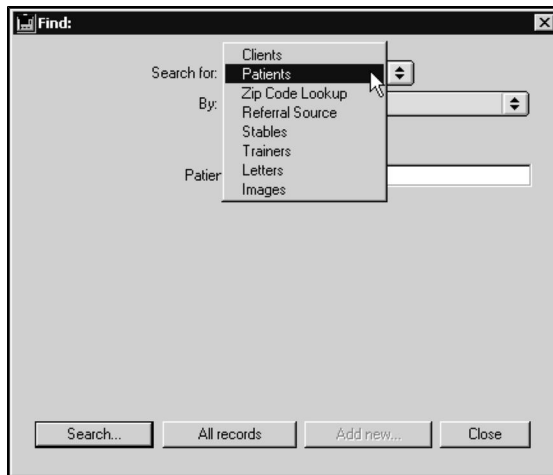
- Click **All Records** at the bottom of the **Find** window.
- The **Patient List** appears, containing a list of all Patients in DVMAX.

The Patient List

A list of all patients matching the search criteria you enter is displayed following a search, or when you click **All Records** from the **Find** dialog. 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.

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

Creating a New Patient Record

You must create a patient record from the record of the client who owns the patient. The fol-lowing steps assume you are working with the Client who owns the Patient. For more infor-mation 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** rec-ord.
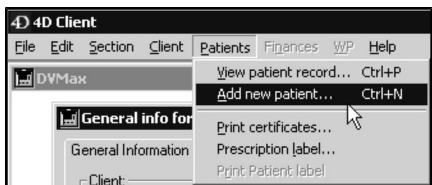
ℹ CONTROL+N (COMMAND+N on Macintosh) is a keyboard shortcut for **Add New Patient**.

- DVMAX opens a new Patient record showing the **General Information** tab The patient record window title will be "General Info for <New Patient> (<Owner Name>)", where <Owner Name> is the name of the Patient's owner (s).

- Type the patient's name and other relevant details in the appropriate fields. You can add to or alter most patient information at any time.

- Click **OK** to save the new Patient record or click **OK & Next Patient** to create another patient record for the same client.

About the Patient General Information Tab

The **General Information** tab of the Patient record shows the patient's vital and clinical information, current status, and lists of Reminders and Recalls pertaining to the patient. For information on the General Information area, see *Entering General Patient Information.*
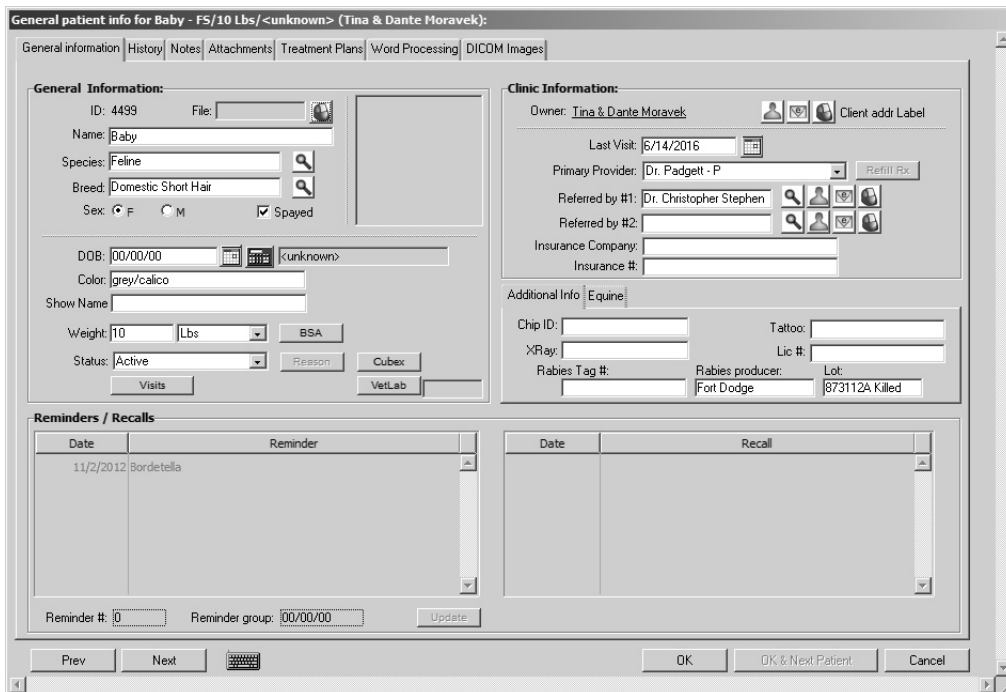
Entering Patient General Information

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

To fill out other general Patient information:

- From the Patient General Information tab, 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.

ℹ️ 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.

ℹ️ 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. Click the Calculator icon to estimate patient's DOB.

ℹ️ You can click the Calendar button to choose a patient's date of birth from a calendar.
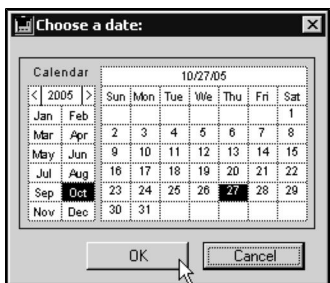
ℹ️ You can click the Calculator button and type the patient's current age in years, months and days, and DVMAX will calculate the date of birth for you.
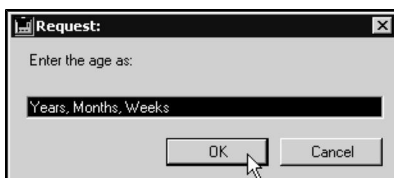
- Type the patient's color, if desired, into the **Color** field.

- 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**. For example, the field label may be **Show Name**, if defined with that label 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.

ℹ️ 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.

ℹ️ 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).

VetLab Button and VetLab Status Information

The VetLab button on the Patient General Information 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.

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.

Cubex Button and Patient Registration

The **Cubex** button on the Patient General Information tab lets you register a patient with the Cubex cabinet without creating an order or requisition from Patient History. Note that Cubex integration and setup must be completed before you can use this button. Contact DVMAX Technical Support for assistance.

To register a patient with the cabinet:

- Click the **Cubex** button.

About Patient Status and Locked Records

When a patient record is locked (in use by another staff member), the status may need to be adjusted manually once the record is available. Patient status cannot be saved when the record is locked. An alert to this effect will be displayed.

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 a 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.

The Clinic Information Area of the Patient Record

The Clinic Information area of the General Information tab 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:
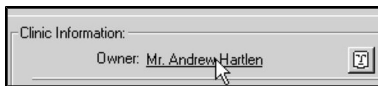
- Click once on the underlined owner's name in the **Clinic Information** area.

-OR-

- Click the **Face** icon beside the owner's name.

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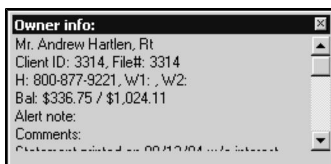
- The **Owner Info** floating window lists the Client name(s), File and ID numbers, home and work telephone numbers, current balances and year-to-date spending, and any alerts notes or comments about this client. For more information on all these items, see *Working with Client Records*.

ⓘ The Client information floating window will not display for split-ownership patients. To view a list of owners for split-owned patients, click **Set Split Ownership** from the **Patient** menu.

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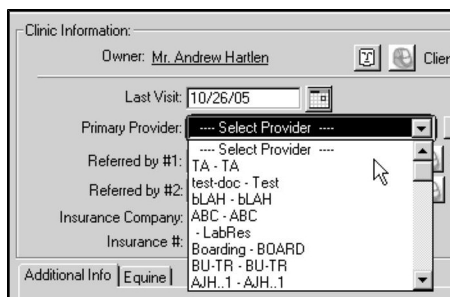
⚠ In order to appear in the **Primary Provider** drop-down lost, a Staff member must have the **Provider** setting selected in the **Staff** record. The **Doctor** setting in the Staff record need not be selected.

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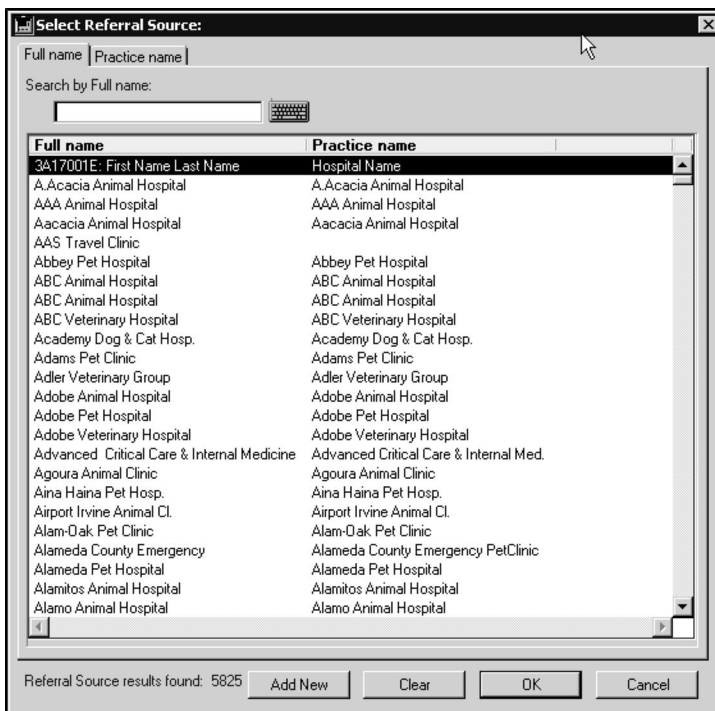
You can specify up to two referral sources for each patient.

To specify a patient's referral source:

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

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

- Click the **Practice Name** tab 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**.

ⓘ 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 opens, containing a summary of the patient's referral source.
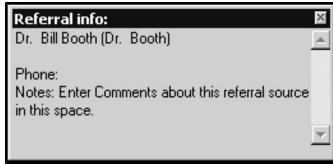
Patient Insurance Company and Policy Number

You can store a patient's Insurance Company and Policy Number in the appropriate fields in the Clinic Information area.
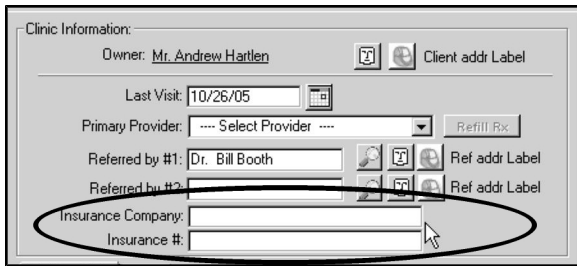
The Additional Info Area of the Patient General Information Tab

The Additional Info area of the General Information window will 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. If you are working with a practice datafile designated as Equine under System Constants, you will see both an **Additional Info** and an **Equine** tab.
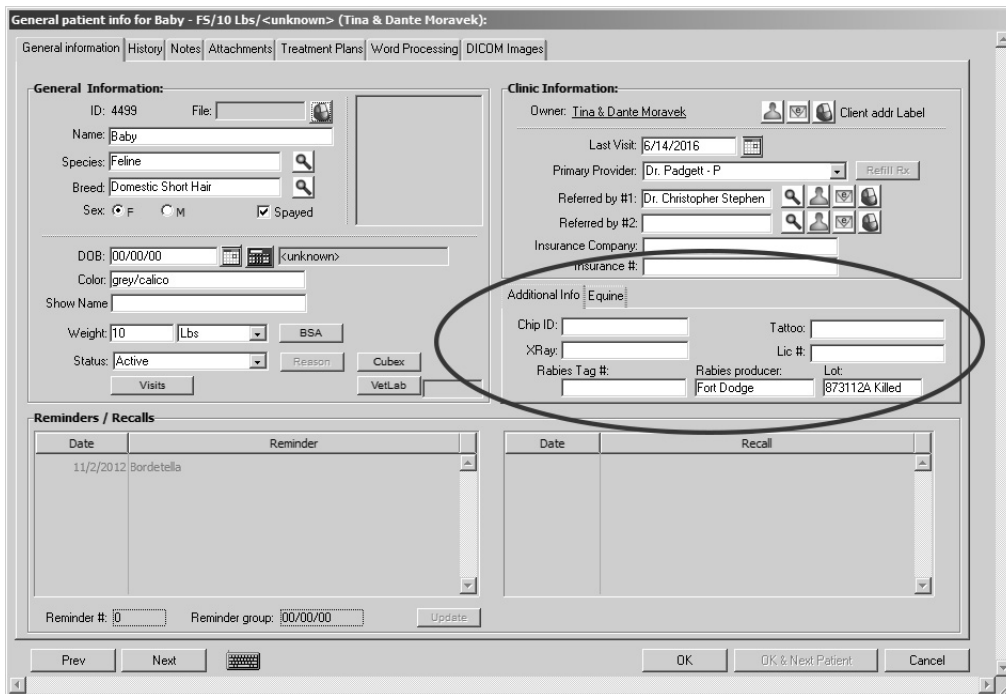
Entering a Chip ID

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.

Rabies Tag Number

To record the rabies tag number for a patient:

- Type the rabies tag number in the **Rabies Tag** field of the **Additional Info** area.

Rabies Producer Field

To record the rabies vaccine producer for a patient:

- Type the producer name in the **Rabies Producer** field in the **Additional Info** area of the **General Information** window.

Rabies Lot Number Field

To record the rabies vaccine lot number for a patient:

- Type the rabies lot number in the **Lot** field in the **Additional Info** area of the **General Information** window.

The Equine Area of the Patient General Information Tab

The Equine area of the General Information window will be available if you are working with a practice datafile designated as Equine under System Constants. This tab will be located beside the Additional Info tab in the lower right of the General Information tab of the Patient record. You can enter Stable, Trainer and other information in the Equine area.

Entering a Stable Name

To record the Stable with which the patient is associated:

- Type the name of the stable in the **Stable** field of the **Equine** area of the **General Information** window, if known. Use the lookup icon to search for the Stable name, as needed.

- To search for a stable name, click the **Horse** icon beside the **Stable** field.

- Click the **Stable Name** tab if you wish to search stables by Name (default), or choose **Contact FullName** to look up Stable by the contact name associated with the stable.

- Type the first few characters of the stable name or contact name, as appropriate, into the **Search By** field at the top of the **Select Stable** window. This will narrow the list of names shown.

- Click to select the stable you wish to use.

- Click **Add New** if you wish to add a new Stable record to the list. You can then choose to select that new record.

- Click **OK** to save your changes and return to the Patient General Info tab.

Entering a Trainer Name

To record the Trainer with which the patient is associated:

- Type the name of the Trainer in the **Trainer** field of the **Equine** area of the **General Information** window, if known. Use the lookup icon to search for the Stable name, as needed.

- Click the **Trainer** icon beside the **Trainer** field.

- Click the **Company Name** tab if you wish to search trainers by company name (default), or choose **Contact FullName** to look up trainers by the individual trainer name associated with the company.

- Type the first few characters of the company name or contact name, as appropriate, into the **Search By** field at the top of the **Select Trainer** window. This will narrow the list of names shown.

- Click to select the trainer you wish to use.

- Click **Add New** if you wish to add a new trainer record to the list. You can then choose to select that new record.

- Click **OK** to save your changes and return to the Patient General Info tab.

Report Costs to Trainer

If you want to send a report of related costs to the trainer, click **Report Costs to Trainer**.

Equine Tattoo Field

To record a Tattoo number for an Equine patient:

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

Equine Groomer Field

To record a groomer name for an Equine patient:

- Type the groomer name in the **Groom** field in the **Equine** area of the **General Information** window.

Rabies Producer Field (Equine)

To record the rabies vaccine producer for an Equine patient:

- Type the producer name in the **Rabies Producer** field in the **Equine** area of the **General Information** window.

Rabies Lot Number Field (Equine)

To record the rabies vaccine lot number for an Equine patient:

- Type the rabies lot number in the **Lot** field in the **Equine** area of the **General Information** window.

Printing Labels From the General Info Tab of the Patient Record

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

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

⚠️ 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 tab 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 tab of a patient record:

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

ℹ️ 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:

- Click the **File Number Label** button (printer icon) beside the **File** field in the top left of the Patient **General Info** tab.

  -OR-

- Choose **Print Patient File Label** from the **Patient** drop-down menu.
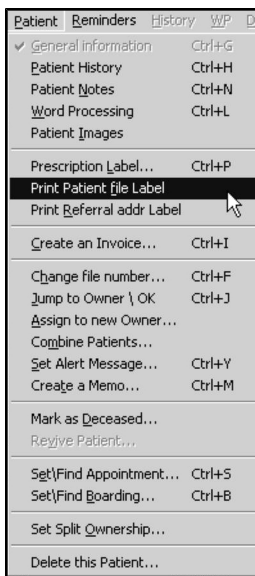
Refill Rx and Print Label from the Patient General Info Tab

If a patient has a prescription refill remaining, you can refill the prescription and print the label for the refill from the patient General Info tab. If there is a refill available, the **Refill Rx** button beside the **Provider** field will be available.

To print a label for a prescription refill from the patient General Information tab:

- Click the **Refill Rx** button beside the **Provider** field.

- From the Prescription List, choose the script you want to refill.

- Click Refill, and the Prescription Labeling dialog opens. Complete the relevant information and click **OK & Print** to print the label.

Combining Patients

You can combine data from two patients into a single record. With the patient record open, select **Combine Patients** from the **Patients** menu. 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.

ℹ 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.
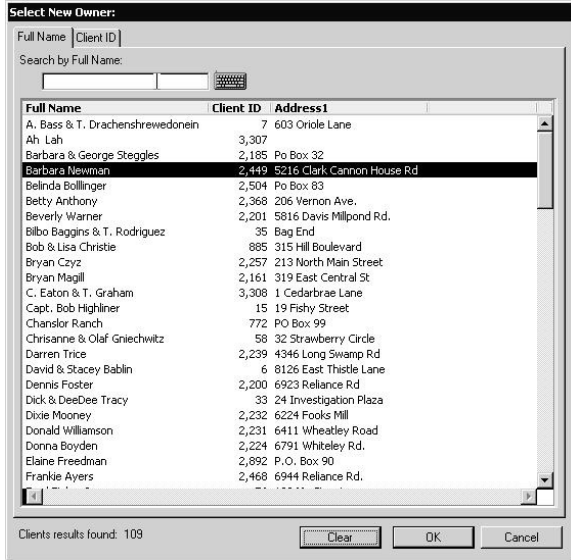
Patient Hospitalization Status

If a patient is currently in hospital, this can be reflected in the **Status** area of the patient record, along with a reason for hospitalization.
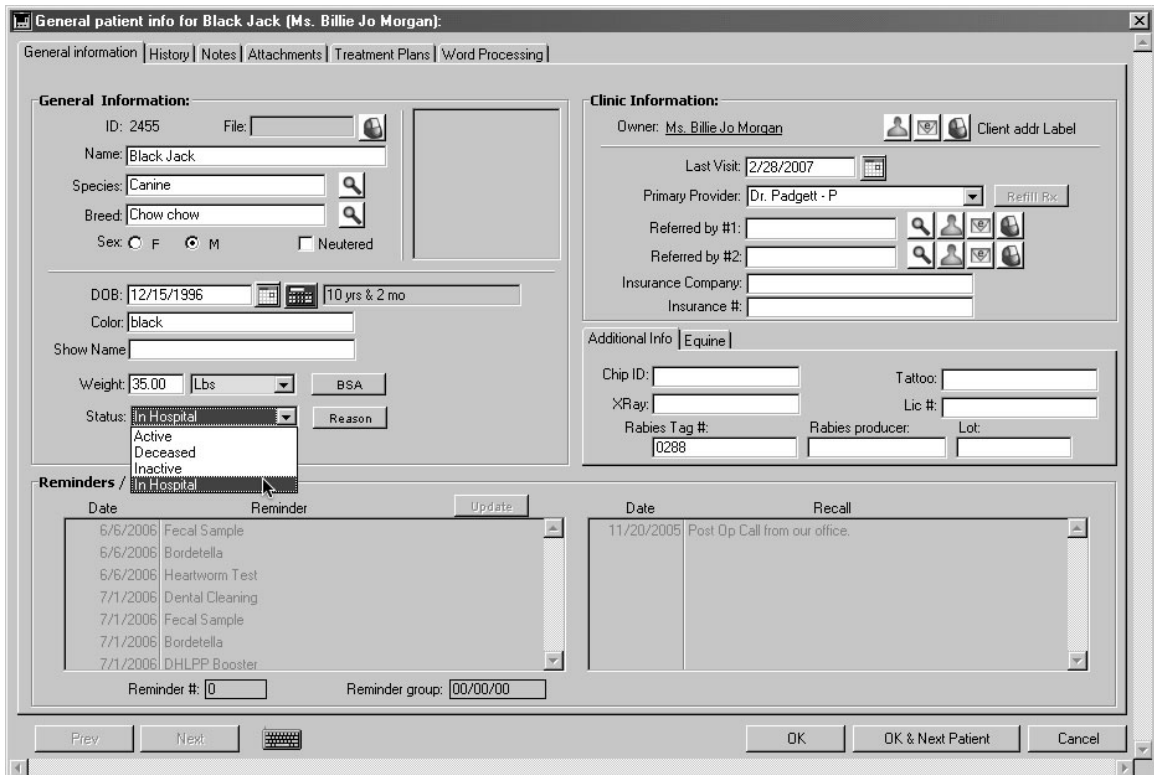
You can view or edit the reason for hospitalization, as well as change hospitalization status from the patient record. A list of all patients' records marked as **In Hospital** can be generated using

the Find facility accessed from **Clients and Patients** on the **Section** drop-down menu (see *Generating a List of Patients "In Hospital"*) or clicking the **Patients** icon.

About Patient Status and Locked Records

When a patient record is locked (in use by another staff member), the status may need to be adjusted manually once the record is available. Patient status cannot be saved when the record is locked. An alert to this effect will be displayed.

Mark a Patient as *In Hospital*

To indicate that a patient is in hospital:

- From the General Information tab of the patient record, select **In Hospital** from the **Status** drop-down list.

- From the Reason window, type a reason for hospitalization if needed. Note that a reason is not required in order to mark the patient as **In Hospital**.
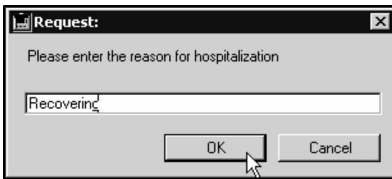
- Click **OK**.

- If the **Prompt for Boarding for 'In Hospital' Patients** is selected under Boarding Setup, DVMAX will open the Boarding Scheduler when you mark a Patient as **In Hospital**. In the bottom right corner of the Boarding Scheduler, you will see a note that indicates that the next Boarding appointment created will be for the patient you have just marked as "In Hospital".

- The **Prompt for Boarding for 'In Hospital' Patients** setting can be found under the **Boarding Setup** of the Boarding scheduler.

View or Edit the Reason for Hospitalization

To view or edit the reason for hospitalization:

- From the General Information tab of the patient record, click **Reason**.
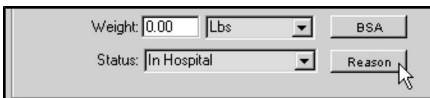
- Edit or enter the reason for hospitalization in the dialog that appears.
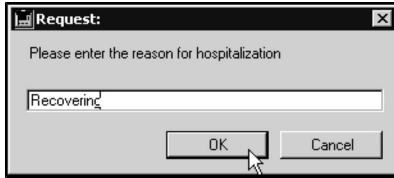
- Click **OK** to save your changes.

Generating a List of Patients *In Hospital*

You can use DVMAX's Find facility to generate a list of all patients marked as being **In Hospital**. To build a list of all patients with status **In Hospital**:

- From the **Section** drop-down menu, select **Clients and Patients**.
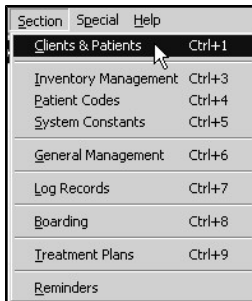
- The **Find** window appears. From the Find window, select **Patients** from the **Search For** menu.
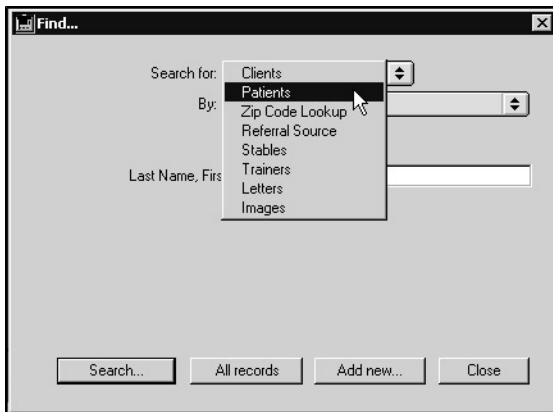
-OR-

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

- From the **By** drop-down menu, select **Patient Status**.
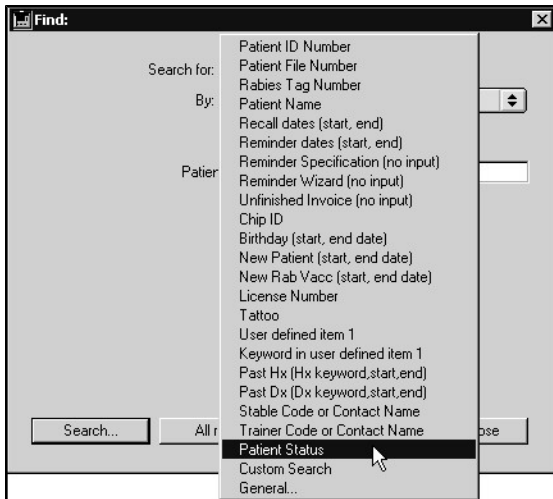
- By default, the **Patient Status** field reads **In Hospital**.   Use this default status to search for all patients with status marked **In Hospital**.
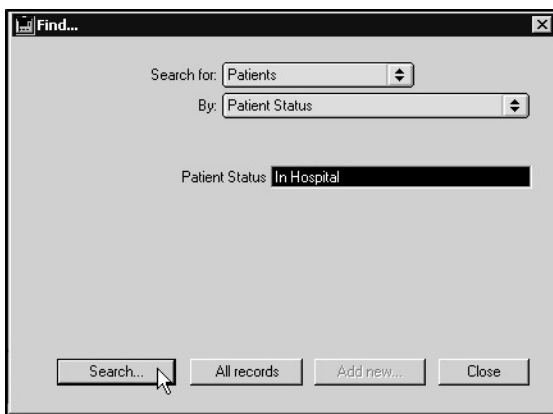
- Click **Search**. A list of all hospitalized patients appears

- To view a record from the list, select a record and click **Show** or double click on a record.

Remember that in order for a patient record to be included in this list, the patient must be marked as **In Hospital**.

Create a Boarding Appointment

To schedule a boarding appointment from a patient record, select **Set/Find Boarding** from the **Patient** drop-down menu. See the *Boarding* chapter in this User Guide details on creating, editing and working with the Boarding scheduler.

Attachments Tab

The Attachments tab of the Patient record allows you quick access to all of the images, documents and other attachments attached to the patient History. You can also access the attachments by viewing individual MREs that have attached documents. A description of working with attachments, including image markup and notation, can be found under *Adding Images or Documents to Medical Record Entries* and related topics in that section of the manual.

Create a Patient Appointment

To create an appointment from a patient record, select **Set Appointment** from the **Patient** drop-down menu. See the *Appointments* chapter in this User Guide details on creating, editing and working with Client and Patient appointments.

If you create an appointment from a new patient record before you have saved the record, DVMAX will automatically save the patient record when you select **Set Appointment**.

Patient Visit History

The **Visits** button in the General Info section of 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).

The top section of the Visits dialog shows Visits (current/active and past visits), and indicates whether a visit is active or not.

- If the Visit Active checkbox is selected (checked), then the visit is active.

- Click the **Visit Active** checkbox to deselect and close a patient visit. When you close the Visits dialog, DVMAX will ask to confirm that you want to close the visits you deselect. Those visits will remain in the visit history, but will be marked as inactive.

- The lower portion of the Visit history dialog shows visit Events, or status changes, over a selected visit. These Events are selected from an appointment record. For example, a patient may be marked as being in the Waiting Room, then an Exam Room, then a Treatment Room. In this way, you can see the approximate amount of time a patient spent in the clinic and where they spent their visit.

Patient History Tab

The Patient **History** tab lists a patient's medical history, consisting of Medical Record Entries and Diagnoses. From the Patient History tab, you can add a Medical Record Entry or Diagnosis to the Patient History, create and submit requisitions, 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.

The Patient **History** tab is divided into three main sections. The MRE Actions/Diagnoses Actions section is in a column on the leftmost side of the window. Medical Record Entries (MREs) are listed in the top part of the window and Diagnoses are listed in the bottom part of the window.
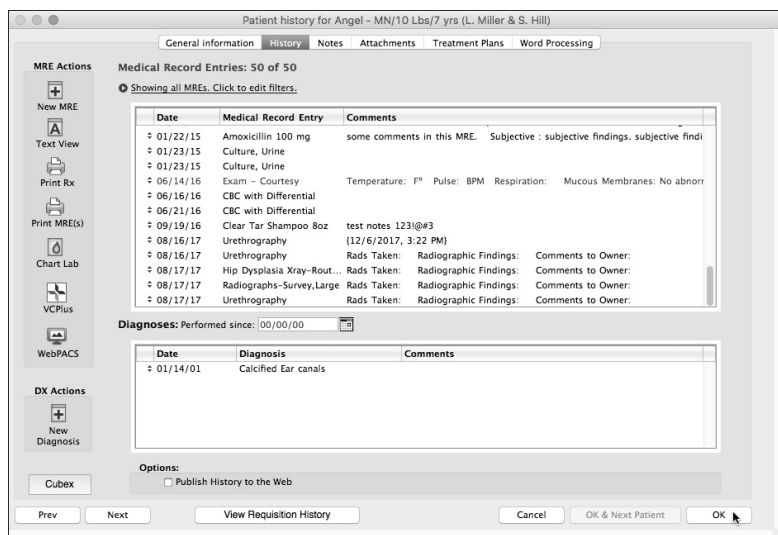
ⓘ The **History Preference** setting in the **Client & Patient Settings** section of **System Constants** controls the order of the MRE and Diagnosis lists. The lists may be ordered with the oldest entries first, or vice-versa.

MRE Actions and Diagnoses Actions

The MRE Actions/Diagnoses Actions section of the Patient History Tab is located on the left side of the History Tab. It consists of a series of buttons that give you quick access to core features.

New MRE – Add a new Medical Record Entry to patient history.

Text View – See the patient history in text view.

Print Rx – Open the Rx Labeler and print a prescription label.

Print MRE(s) – Print selected medical record entries.

Chart Lab – Select assays and chart in-house lab results.

VCPlus – Open VCPlus and view IDEXX reference lab results. This feature must be configured before it can be used. See *Integrations, Requisitions and Lab Results*.

WebPACS – View diagnostic imaging from a web portal, either from IDEXX Web PACS or Purview (depending on your selected provider). This feature must be enabled before it can be used.

New Diagnosis – Add a new diagnosis record to patient history.

Add a Medical Record Entry to 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.
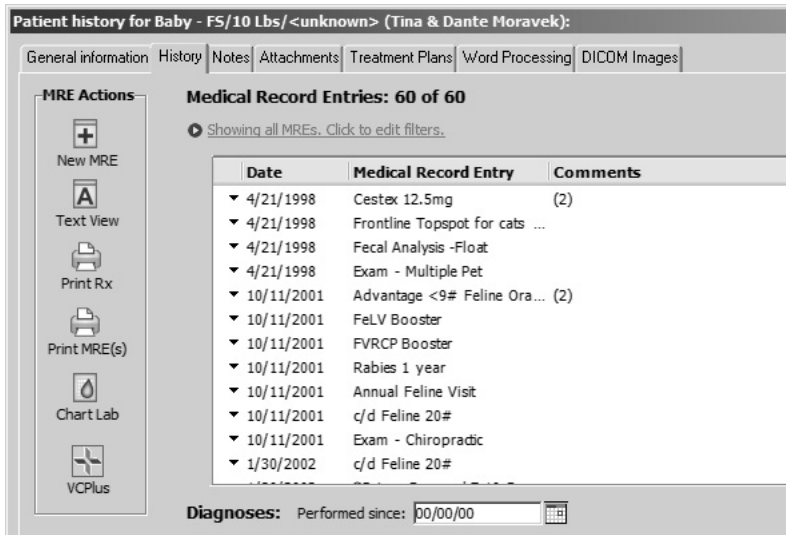
-OR-

- Choose **Add New Medical Record Entry** from the **History** drop-down menu.
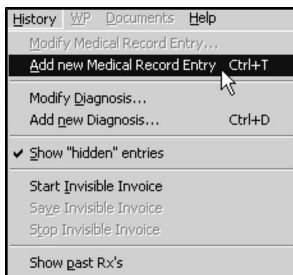
ⓘ CONTROL+T (COMMAND+T on Macintosh) is a keyboard shortcut for **Add New Medical Record Entry**.

- 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.

If you cannot remember the 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.

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.

- Select the **Hide in List** checkbox if you do not wish this MRE to appear on the MRE list or on printed Patient History. See *Hiding Entries*.

- 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.

- 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. If Hide on Web is selected, the MRE will not be shared with rVetLink even if all other rVetLink settings are enabled for sharing this MRE type.

ℹ️ The **Hide on Web** checkbox will be selected and disabled if the MRC associated with a medical record entry 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** tab.

-OR-

- Click **OK & New MRE** to save this MRE to 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** tab without adding the MRE.

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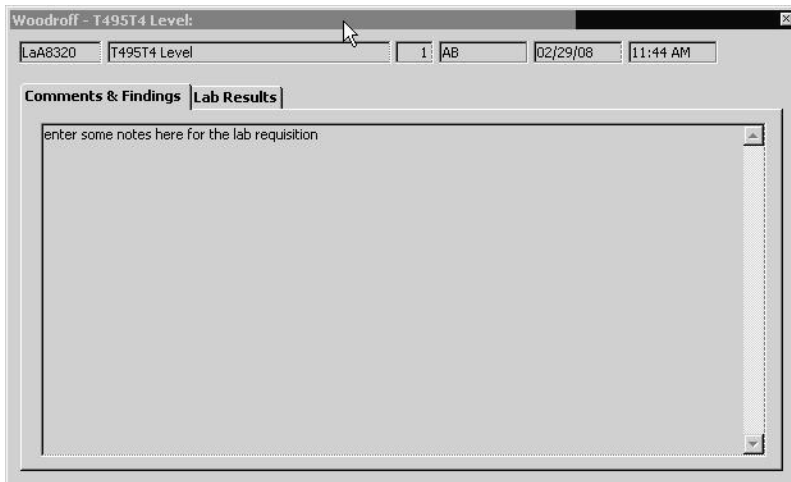
- Alternatively, you can click the small arrow immediately to the left of the MRE you wish to view, and an action menu displays. From that window, select **Open** or **Open in floating window**
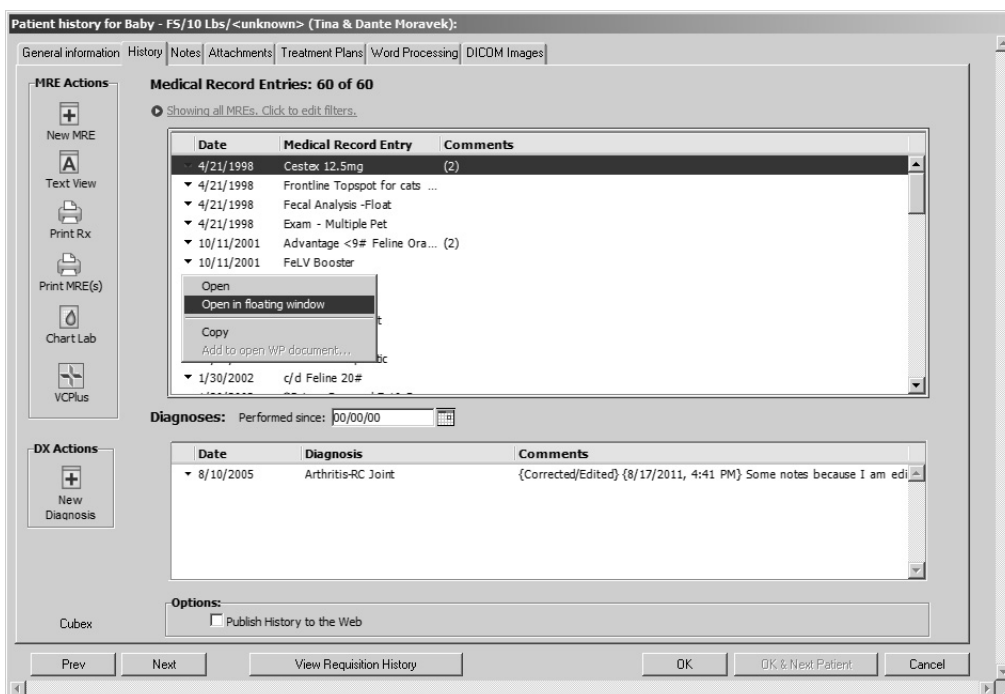
Copying MREs and Diagnoses

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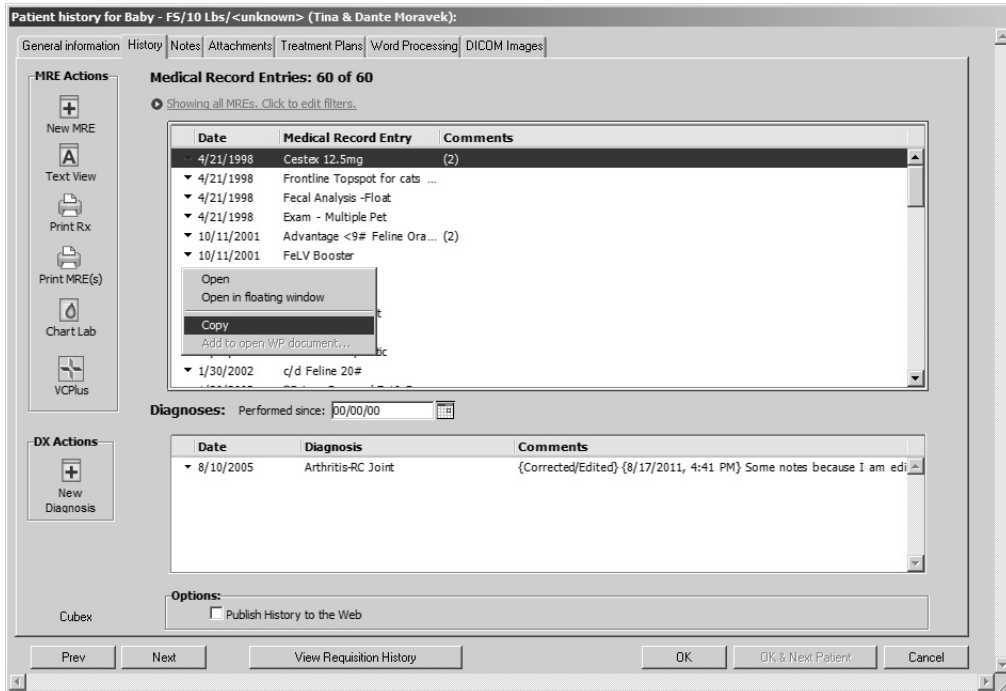
- Click **New MRE** to add a new MRE. The Add New Medical Record Entry window opens. Click **Paste Copied MRE**. The MRE is pasted, complete with findings and comments.
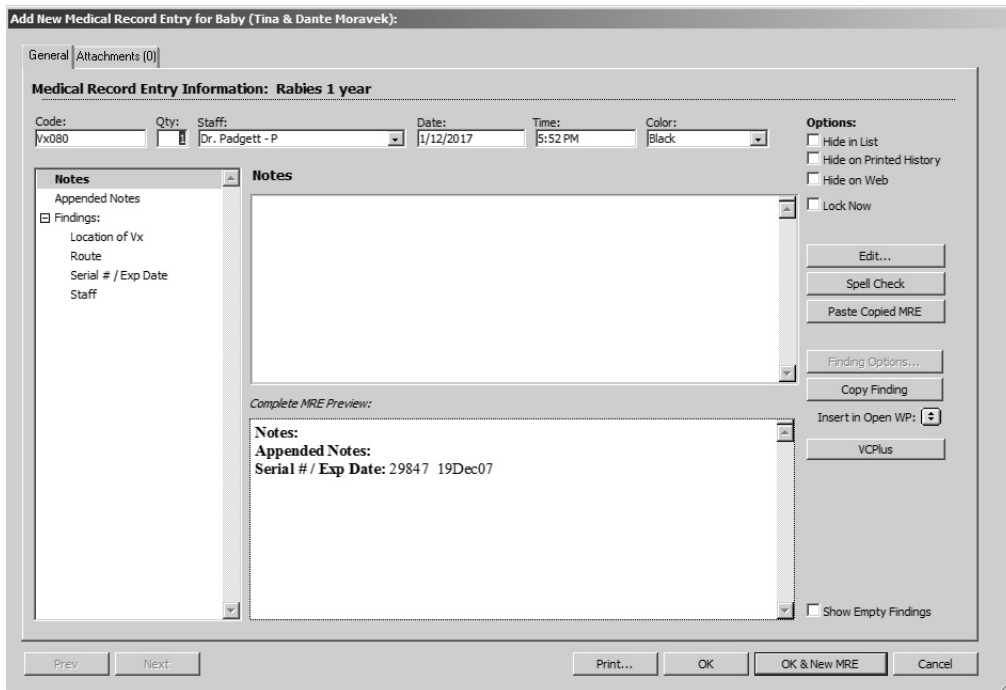
Assign a Color to an MRE

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 MRE list.**
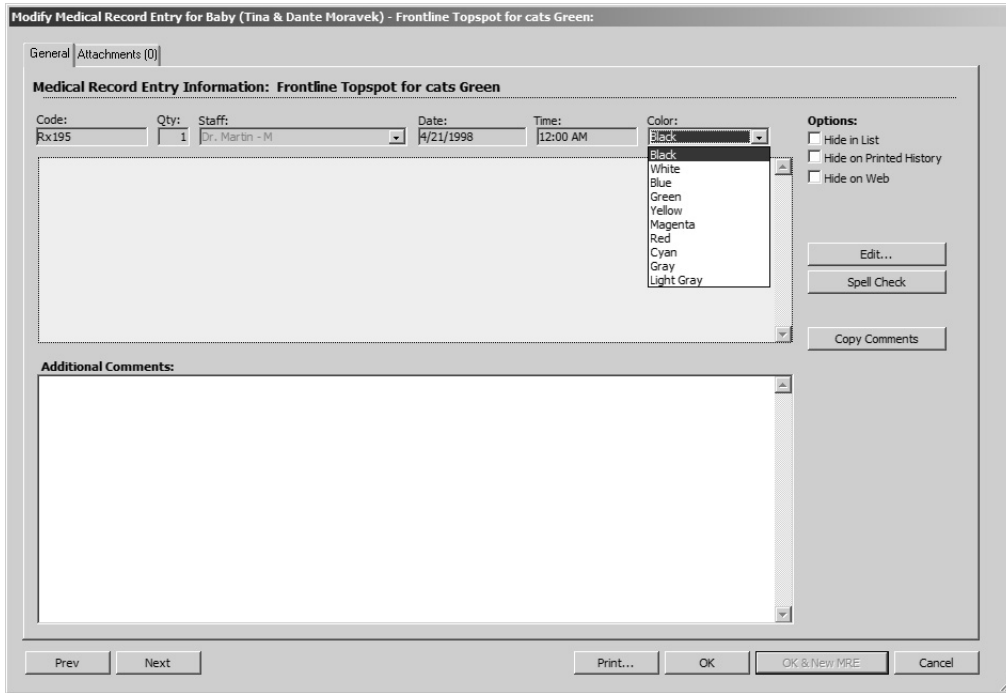
Copy MRE Comments

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.
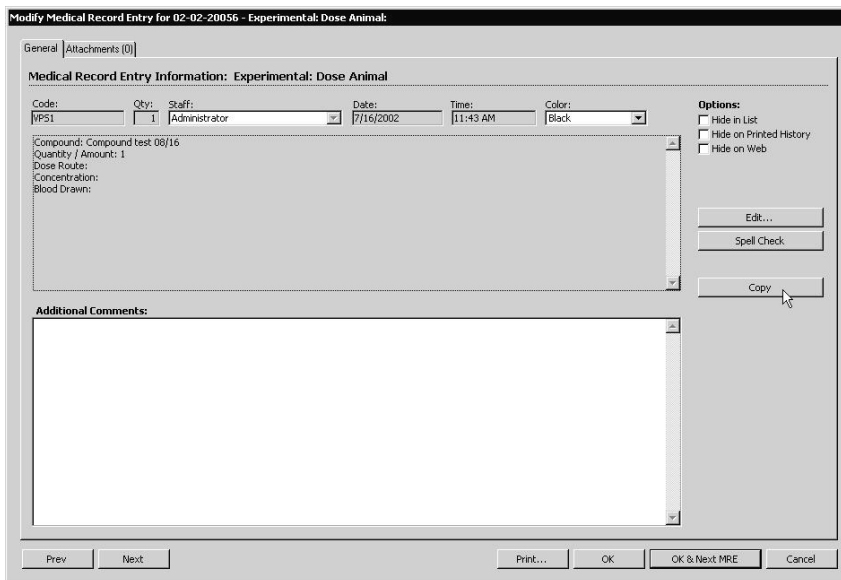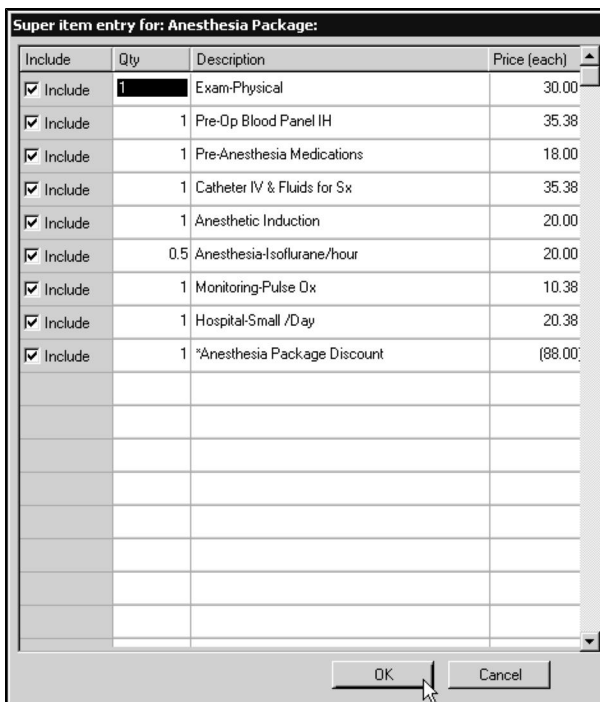
Filtering the List of Medical Record Entries

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

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)
☑ Include	1	Exam-Physical	30.00
☑ Include	1	Pre-Op Blood Panel IH	35.38
☑ Include	1	Pre-Anesthesia Medications	18.00
☑ Include	1	Catheter IV & Fluids for Sx	35.38
☑ Include	1	Anesthetic Induction	20.00
☑ Include	0.5	Anesthesia-Isoflurane/hour	20.00
☑ Include	1	Monitoring-Pulse Ox	10.38
☑ Include	1	Hospital-Small /Day	20.38
☑ Include	1	*Anesthesia Package Discount	(88.00)

Super item entry for: Anesthesia Package:

- 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.

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.
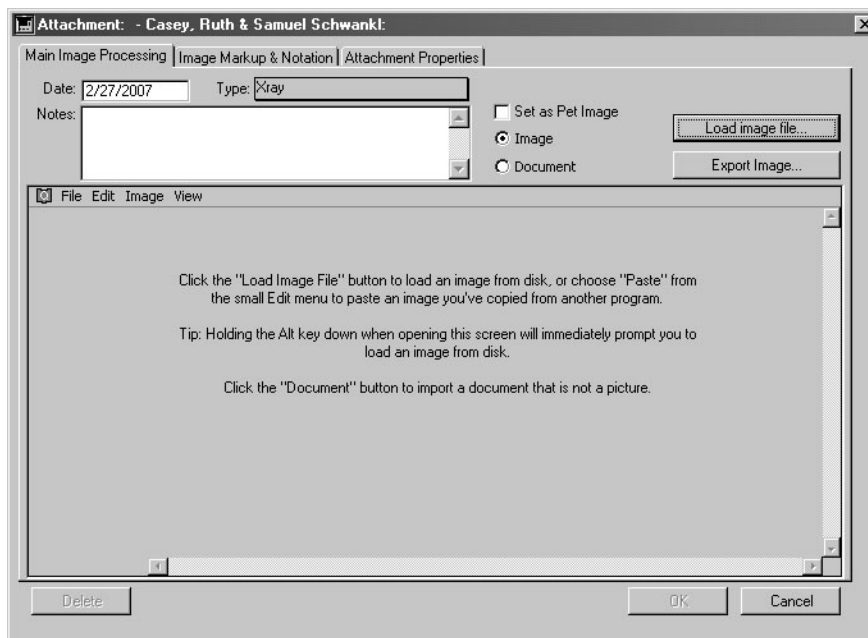
- If necessary, change the date of this image from the current date in the **Date** field.

- 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**.
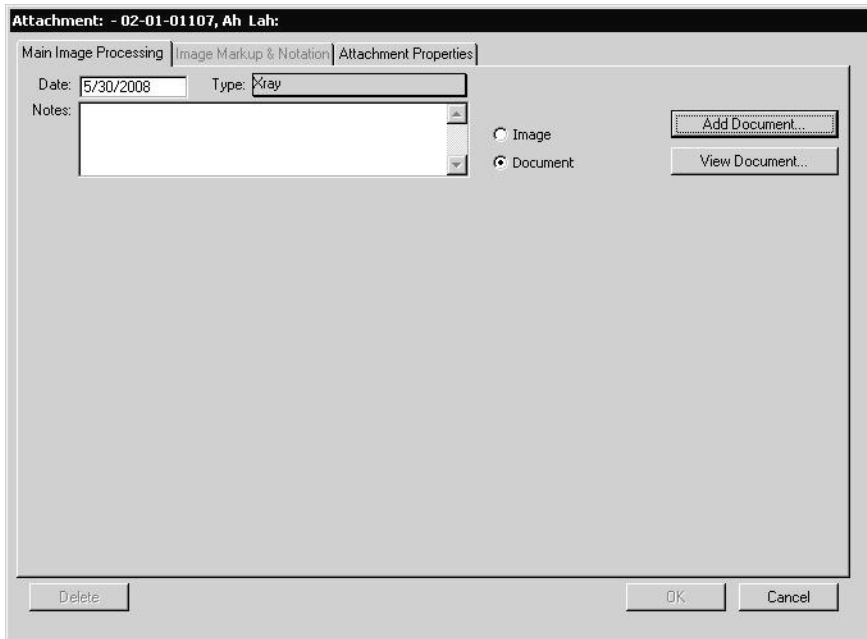
Drag and Drop Images and Documents

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 or open an individual MRE which an attachment.

- 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**.
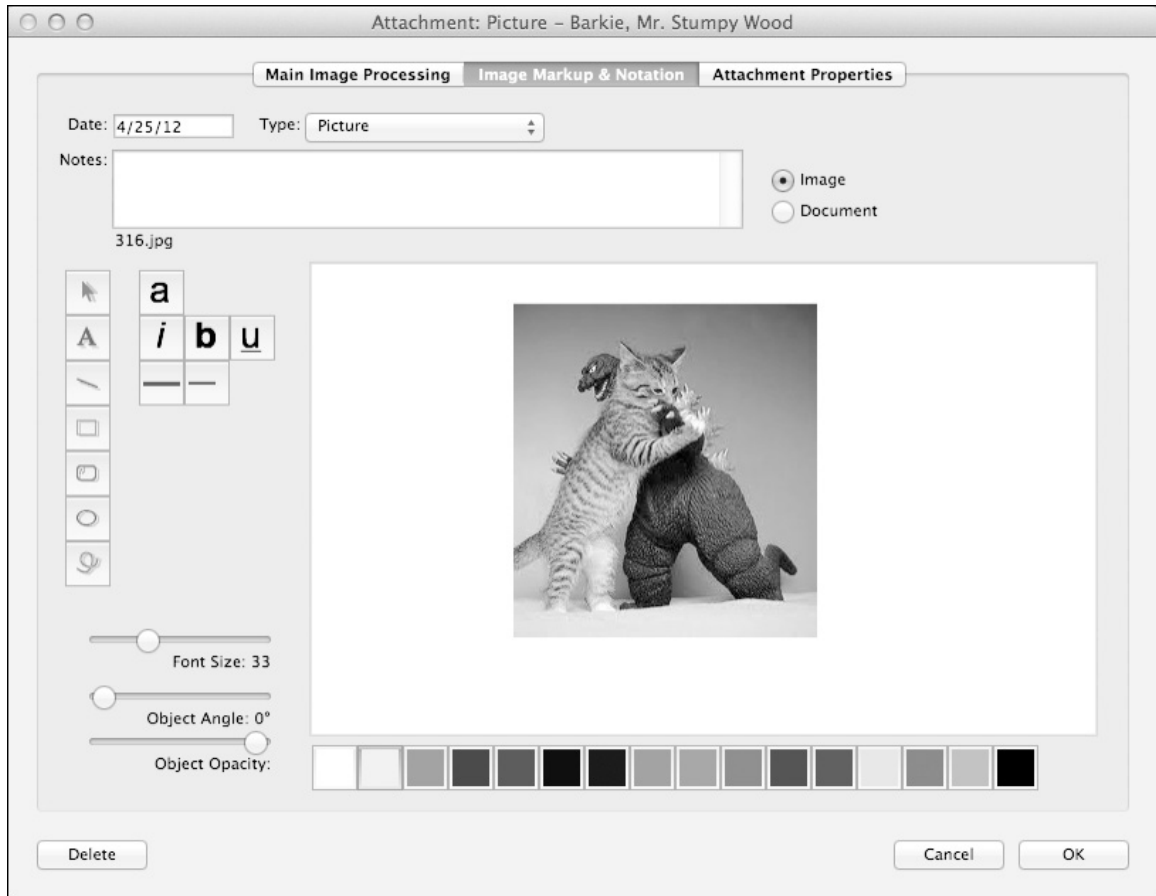
- The Image Markup & Notation dialog opens. Notation and markup options allow you to add notes, add text, add shapes, edit colors, select fonts, adjust size, and change angle and opacity.

- 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 or 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 open. 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. See *Auto-Image Import File Naming Conventions* for more.

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.
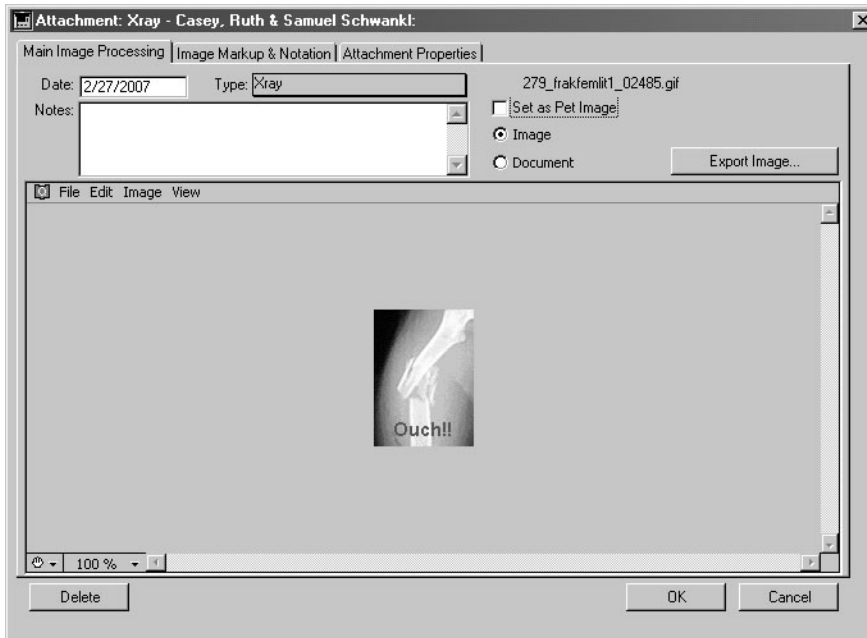
- DVMAX will ask you twice to confirm that you wish to delete the image or document.
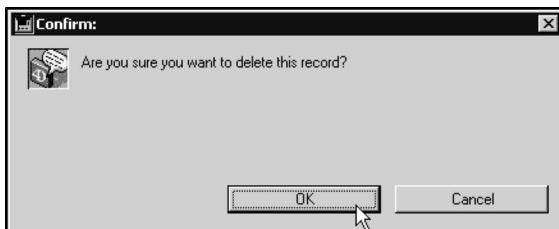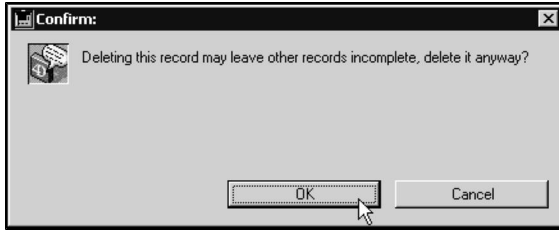
- Click **OK** in each dialog to delete the image or document and return to the **Attachments** window.

- 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 comments of the MRE (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
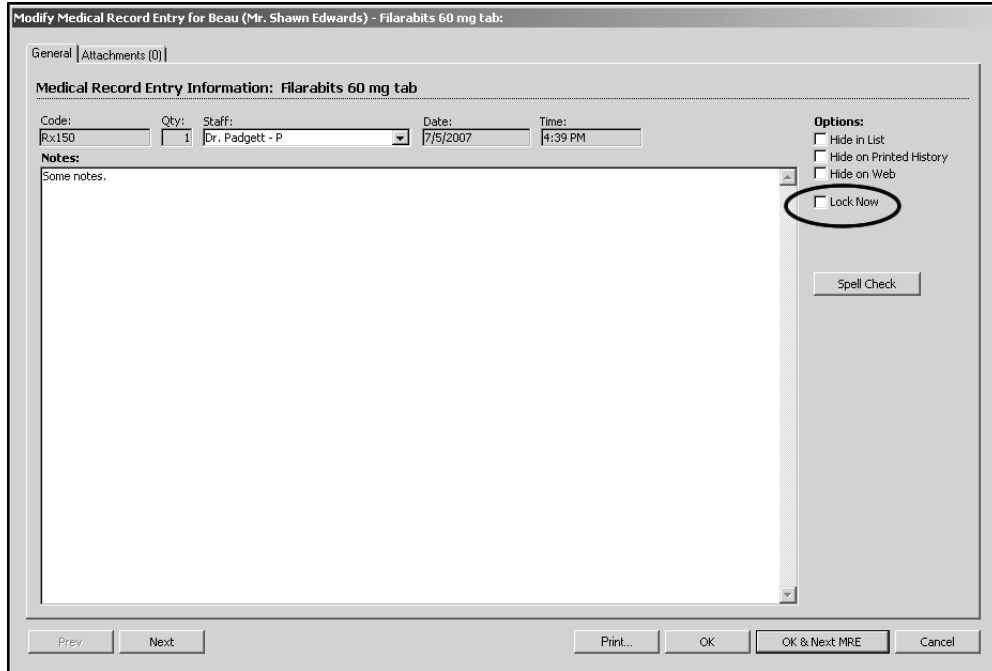
- A confirmation dialog will appear
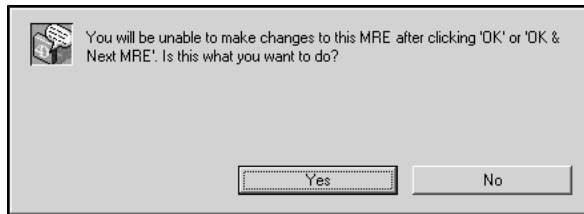
- Click **Yes** to lock the MRE. Click **No** to leave the MRE unlocked.

- 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 opens.

- Click in the comments area and edit or add to any existing text as desired.

- You can change the **Staff** drop-down list.

- Click **OK** to save your changes to the Medical Record Entry and return to the Patient **History** tab.

-OR-

- Click **Cancel** to return to the Patient **History** tab without saving any changes to the Medical Record Entry.

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

Modifying a Locked Medical Record Entry or Diagnosis

You can alter the text of a Medical Record Entry or Diagnosis for up to 24 hours after is has been created. After this point, DVMAX "locks" the record, and any attempt to modify the original text contents results in a duplicate MRE or Diagnosis.

To modify the original text of a locked Medical Record Entry or Diagnosis:

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

- Click the **Edit** button on the **Modify** window

- DVMAX will ask you to confirm that you wish to edit and re-enter the MRE or Diagnosis.

- Click **Yes**. The original MRE or Diagnosis is copied to a new, editable, MRE or Diagnosis. DVMAX automatically timestamps your revision in the comments area.

- If necessary, change the staff member responsible for this MRE or Diagnosis by choosing from the **Staff** drop-down list.

- Click in the comments area below the timestamp and edit or add to any existing text.

- Click **OK** to save your changes to the Medical Record Entry or Diagnosis and return to the Patient History window. The new, edited item appears in the list, immediately above the original.

⚠️ The date of the original MRE or Diagnosis is preserved in the edited version.

Adding a Comment to a Locked Medical Record Entry or Diagnosis

You can add a comment to a locked Medical Record Entry or Diagnosis at any time:

- Open an existing Medical Record Entry or Diagnosis by double clicking it in the list on the Patient **History** tab.

- The **Modify** window appears, with the cursor positioned in the secondary comments field.

- Type your comment in the secondary comments field.

- Click **OK** to save your comment. DVMAX will timestamp your comment and append it to the original text.

Copying the Text of a Locked Medical Record Entry

You can copy the text of a locked Medical Record Entry and paste it into another area of DVMAX, or into another program on your computer. To copy the text of a locked Medical Record Entry:

- Open the MRE whose text you wish to copy.

- Click the **Copy** button.

Hiding and Showing Diagnoses and Medical Record Entries

You can hide selected Diagnoses and Medical Record Entries from the lists displayed on the Patient History window. The **Show Hidden Entries** setting on the **Patient** on this **History** menu controls the behavior of items marked as hidden.

- If **Show Hidden Entries** is not selected (i.e. there is no checkmark beside it in the **History** menu), MREs and Diagnoses marked as hidden will not be listed on window, printed on patient histories or included in Word Processing documents.

- If **Show Hidden Entries** is selected (i.e. there is a checkmark beside it in the **History** menu), MREs and Diagnoses marked as hidden will be listed on window, printed in patient histories, and included in Word Processing documents.

Hiding a Medical Record Entry or Diagnosis is the equivalent of crossing out an entry in a paper record. The entry still exists, but is not an active part of the history record.

Hiding a Medical Record Entry or Diagnosis

To hide a Medical Record Entry or Diagnosis from the Patient History window:

- Double click the Medical Record Entry or Diagnosis you wish to hide.

- Click to select the **Hide in List** checkbox.
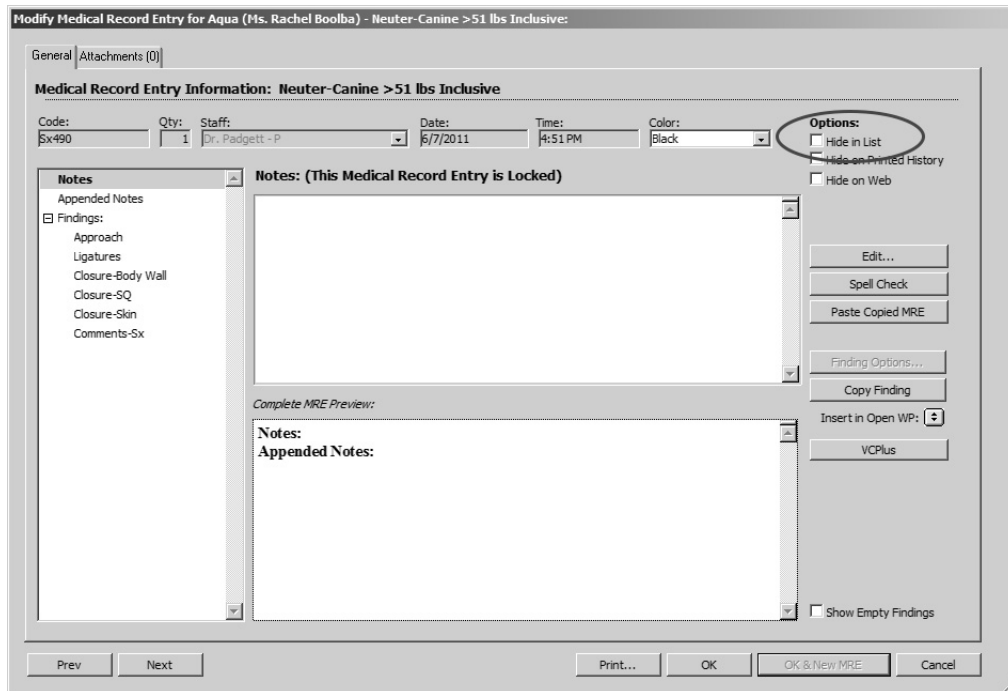
- Click **OK** to return to the Patient History window.

⚠️ If the MRE or Diagnosis you have hidden still appears onscreen after following the procedure above, check to ensure that **Show Hidden Entries** is not selected in the **History** menu. If it is, choose it from the menu to deselect it.

Showing and Hiding Hidden Medical Record Entries and Diagnoses

To show Medical Record Entries and Diagnoses marked as hidden:

- Choose **Show Hidden Entries** from the **History** menu, so that a checkmark appears beside it.
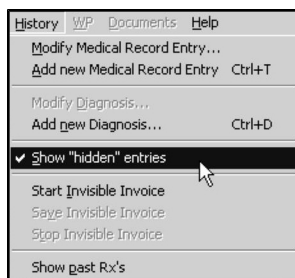
To hide Medical Record Entries and Diagnoses marked as hidden:

- Choose **Show Hidden Entries** from the **History** menu, so that no checkmark appears beside it.
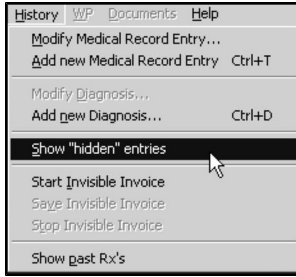
Entering Findings in Medical Record Entries and Diagnoses

Findings allow you to quickly select from a predefined list of conclusions when entering an MRE or Diagnosis. They can eliminate the inaccuracies resulting from the need to type these items in. Findings can be entered when initially creating an MRE or Diagnosis, or can be entered after the fact as a subsequent comment to an existing MRE or Diagnosis (see *Adding a Medical Record Entry, Adding a Diagnosis*, and *Modifying a Locked Medical Record Entry or Diagnosis.)*

To enter Findings on an open Medical Record or Diagnosis:

- Enter the **MRC** in the **Code** field.

- If the **MRC** has associated **Findings** the remainder of the window will list the available Finding items.

⚠ If the MRC does not have any associated Finding Items no Findings will be listed.
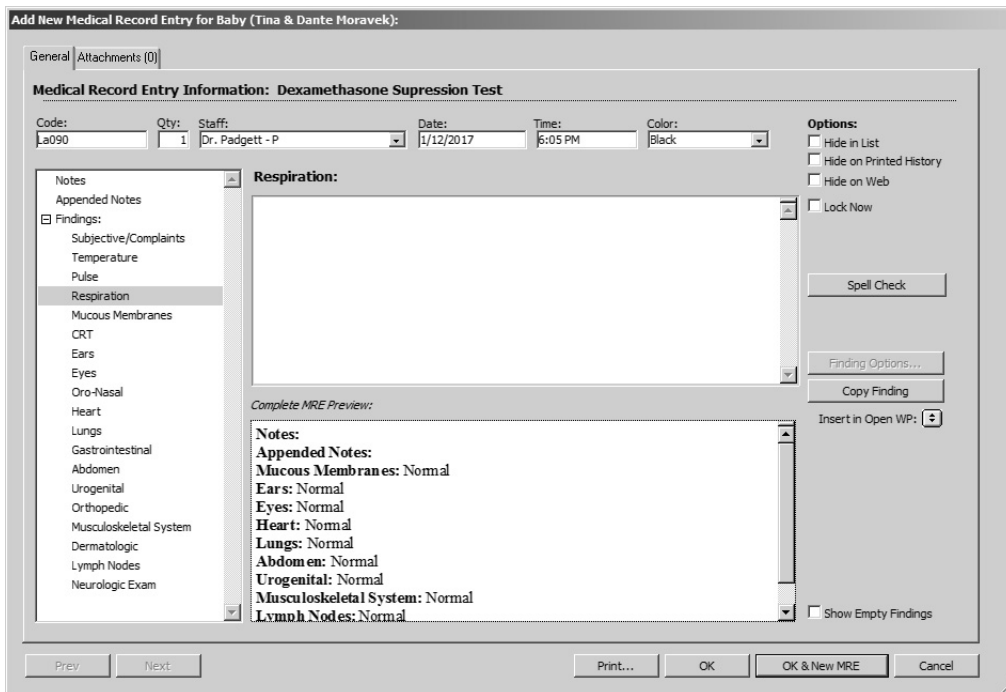
- Click a Finding item from the **Findings** list on the left.

- Add notes for each Finding item in the comment box on the right of the window. Each new finding note will be automatically compiled into the finding at the bottom right of the window.

- Click once on each Finding item you wish to insert as a Finding on the MRE or Diagnosis.

- Click **OK & Next MRE** to close the **Findings Entry** window, insert the Finding Items on to the MRE or Diagnosis and proceed to the next MRE or Diagnosis on the Patient History.

Using Macros in Medical Record Entries and Diagnoses

You can take advantage of DVMAX's Macro capability in the comments area of either a Medical Record Entry or Diagnosis. Macros will work both in initial comment entry and in subsequent comments.

⚠ You must define Macros before they can be available in MREs or Diagnoses. Macros are defined in the **Macros** section of System Constants. See the Macros chapter of this reference for more information.

⚠ You must type the character "\" before a defined Macro name in order for DVMAX to recognize it as a macro. For example, if there is a defined Macro called "behave", you must type "\behave" in an MRE or Diagnosis comment to use that Macro.

For more information on Macros, see the *Marcos* chapter of this reference.

Print Medical Record Entries

You can print a patient's entire history or print a partial treatment history. To print a selection of Medical Record Entries:

- Click in the patient history area to select the Medical Record Entries you wish to print. You can skip this step if you wish to print all MREs.

ℹ Hold the SHIFT or CONTROL key (COMMAND on Macintosh) while clicking to select multiple MREs.

- Click the **Print MRE(s)** button on the Patient **History** tab.
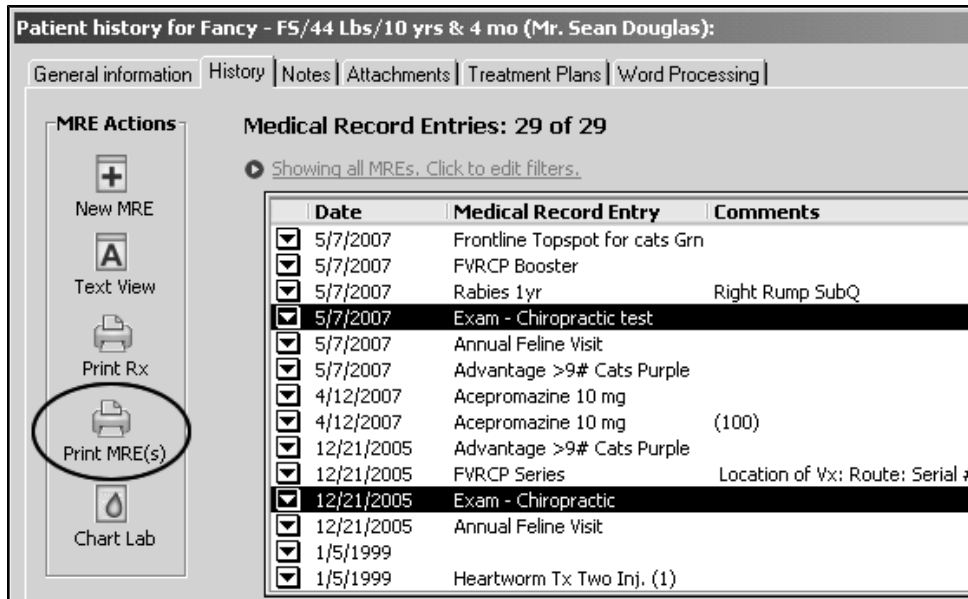
- The **Print MREs** dialog appears.
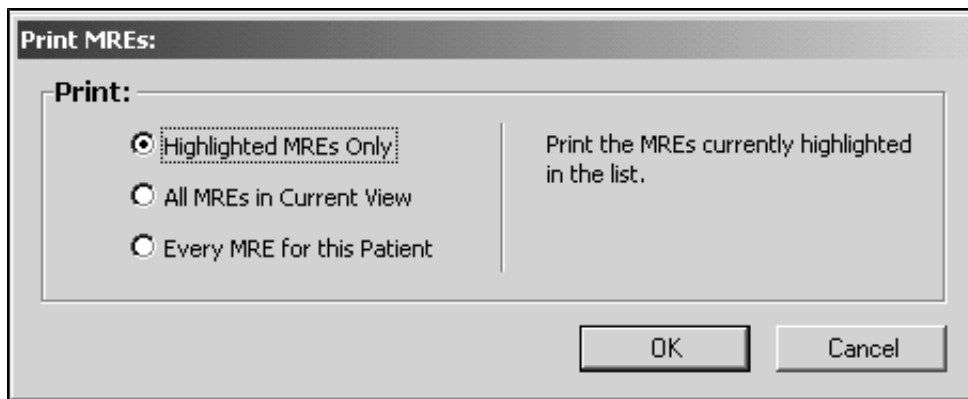
- Selecgt **Highlighted MREs Only** radio button to print only the MREs you have highlighted in the list.

-OR-

- Select **ALL MREs in Current View** radio button to print all MREs currently listed on the patient history window.

-OR-

- Select **Every MRE for this Patient** radio button to print all MREs for the current patient, regardless of whether it is currently listed on the patient history window.

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).

⚠ The **Hide on Printed History** and **Hide in List** settings on individual Medical Record Entries interact with the Print MRE button in the following ways:

- If an MRE is marked as **Hide in List**, it will print if **All MREs in Current View** or **Every MRE for this Patient** is chosen.

- If an MRE is marked as **Hide on Printed History**, it **will** print if the **Every MRE for this Patient** option is chosen. A note stating that the MRE is excluded from standard printed histories will be printed along with the MRE.

⚠ The **Include Time on Patient History Printouts** System Constant controls whether DVMAX includes the time of the MRE in the printed report. If this setting is selected, the time the MRE was entered will be printed. The **Include Time on Patient History Printouts** setting is found in the **Client and Patient Settings** section of System Constants.

Add a Diagnosis to 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** tab.

-OR-

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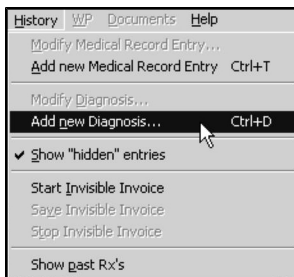
-OR-

- Click the **Add New Diagnosis** button on the Patient **History** tab.
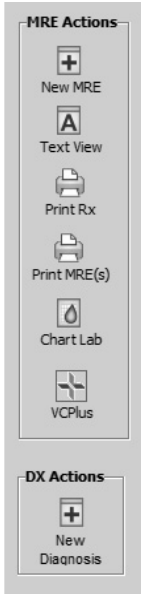
 CONTROL+D (COMMAND+D on Macintosh) is a keyboard shortcut for **Add New Diagnosis.**

- The **Add New Diagnosis** window opens.
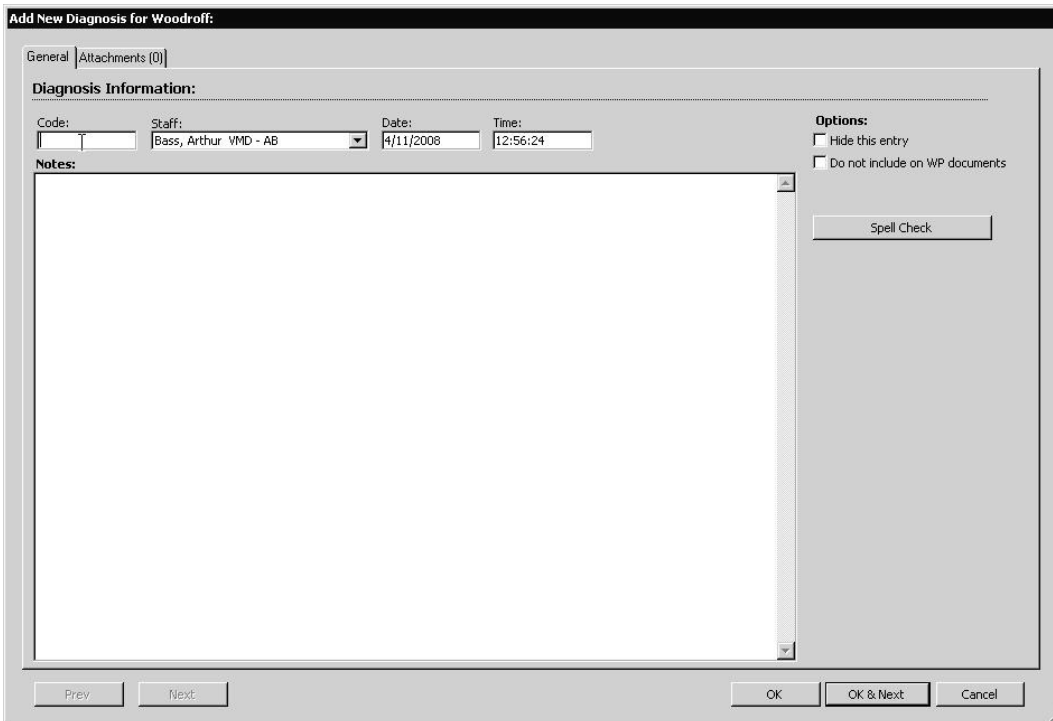
- Type a diagnosis code in the **Code** field in the **Add New Diagnosis** window.

- 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.

ℹ️ 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** tab 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** tab.

-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** tab without adding the diagnosis.

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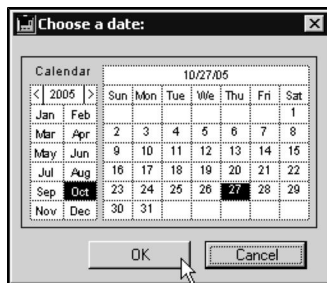
- Click **OK** in the Calendar to filter the lists and return to the **Patient History** tab.

-OR-

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

 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.

Chart Lab Results

The Chart Labs feature allows you to select any number of assays from a list of available results, then chart the selected results.

To chart in-house blood results:

- From a patient record, select the **History** tab.
- Click **Chart Labs**.

- Select the date range within which to search for results. Type the **Start Date** and **End Date** or use the **Calendar** function to select a date range.

- Click **OK**.
- From the **Assay List**, select the items you would like to chart.

- Click again to deselect an item. If there are no items on the list, no in-office blood results were found within the specified date range.

- Click **Chart** on the **Assay List** window to build the assays chart.

- Selected Assays are displayed on a graph.

Accessing VetConnect PLUS Results from the Patient Record

You can access IDEXX VetConnect PLUS results for a patient directly from the patient History tab. If you have created a requisition via DVMAX (see *Integrations, Requisitions and Lab Results*), those results will be delivered to the patient record. You can also view those results directly in VetConnect PLUS at the click of a button.

If a VCPlus order has been returned for a specified patient, the **VCPlus** button will be white and red. If there are no results for the patient or if you have not created an order for the patient, the button will be grey.

To view lab results in VetConnect PLUS:

- From the Patient History dialog, click the **VCPlus** button.

- Where prompted, log in to VetConnect Plus.

- Use VetConnect as you would normally.

If you have any questions about VetConnect, your IDEXX VetConnect account or your VetConnect Plus credentials, please contact IDEXX VetConnect.

ⓘ If DVMAX is not able to match a patient with a VetConnect PLUS account or with a Reference Lab result, the VetConnect PLUS home page will launch. The VetConnect PLUS home page provides additional search, setup and review options.

View Diagnostic Images from the Patient Record (Web PACS)

You can now access diagnostic images for a patient directly from the patient History tab. This replaces previous imaging functionality that was accessed via the DICOM tab of the patient record (version 8.6 and earlier). This feature must be enabled before it can be used. DVMAX supports IDEXX Web PACS and PurView imaging platforms.

If the patient record you are viewing has images, the **WebPACS** button, located on the lower left side of the History screen, will be white and red. If there are no images for the patient, the button will be grey.

To view images via Web PACS:

- From the Patient History dialog, click the **WebPACS** button.

- Where prompted, log in to your PACS account.
- Use your Web PACS platform as you would normally.

![info icon] If you have any questions about your IDEXX Web PACS account or credentials, please contact IDEXX Web PACS.

![info icon] If images for the selected patient do not exist, clicking the **WebPACS** button will launch the home page associated with your PACS service. For example, in the case of IDEXX Web PACS, the VetConnect PLUS home page will open once you log in. The VetConnect PLUS home page provides additional search, setup and review options.

Viewing 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.

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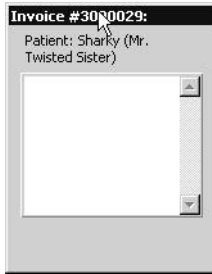
DVMAX is ready to record the changes you make on the **Patient History** tab to the Invisible Invoice.

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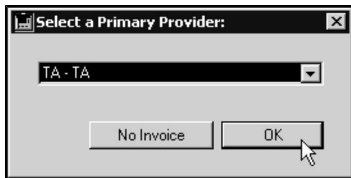
See the *System Constants That Affect The Patient Record* for instructions on how to turn on the **Automatic Invisible Invoice** setting.

ⓘ 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.

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 manually start an Invisible Invoice:

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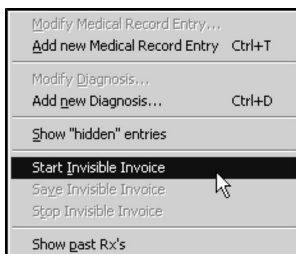
Save an Invisible Invoice

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.
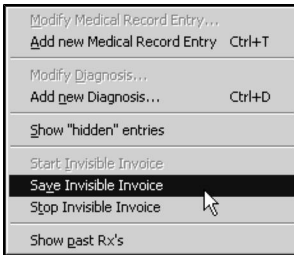
- You will see the message "Closing and Saving" appear as the Invisible Invoice window's status message. When the Invisible Invoice window disappears, the Invisible Invoice has been successfully saved as an unfinished invoice on the client's Finances window. Any further changes you make to the Patient's 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.

Cancel an Invisible Invoice

To cancel an Invisible Invoice:

- Choose **Stop Invisible Invoice** from the **History** drop-down menu.
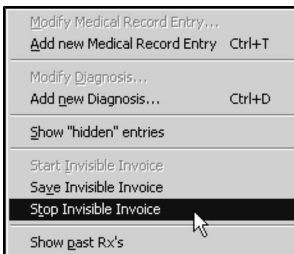
- DVMAX will ask you to confirm that you wish to cancel the Invisible Invoice.
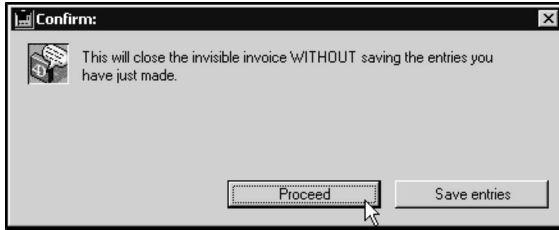
- Click **Proceed** to cancel the Invisible Invoice without saving any changes you have made since the last time the Invisible Invoice was started.

–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**.

Create an Invoice from a Patient Record

Using Invisible Invoicing is a fast, accurate way to capture charges associated with a patient visit. However, you can manually open an invoice from a patient record by choosing **Create an Invoice** from the **Patient** drop down menu. For information on invoicing, see *Patient History and Invisible Invoicing* or refer to the chapter on *Invoicing* in this user guide.

Printing a Prescription Label from the Patient History

You can create a prescription label from the Patient History tab by clicking the Print Rx button on the left side of the History window.

To print a label for a prescription from the History tab:

- Click the **Print Rx** button on the left side of the History window.
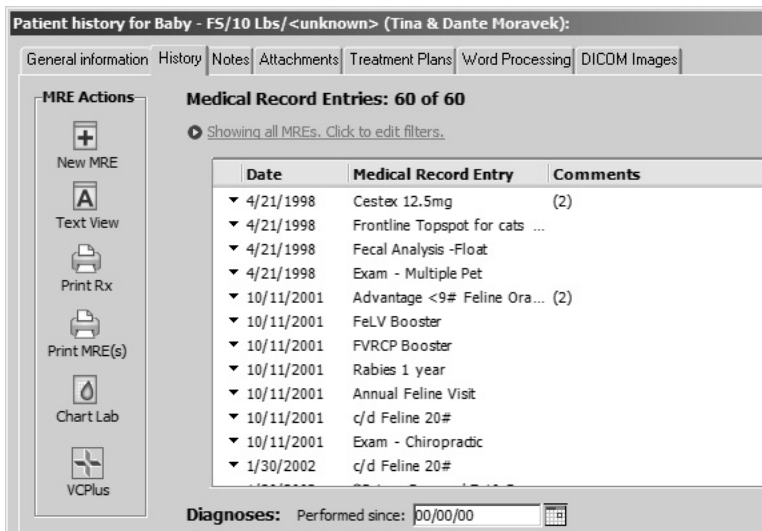
-OR-

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

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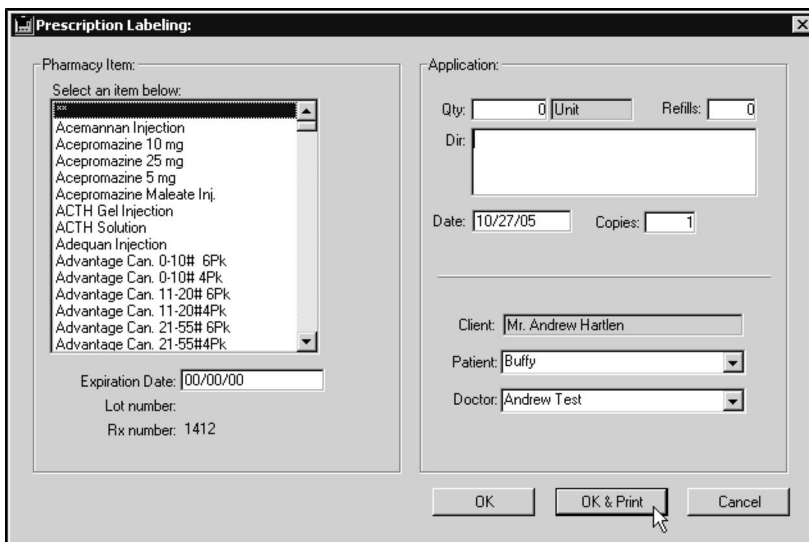
- Complete the **Prescription Labeling** window and click **OK & Print** to print the label. For information on the **Prescription Labeling** window, see *Prescriptions and Refills*.

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

Patient History Text View

You can view or print the complete medical history of any patient in DVMAX. The **Patient History Text View** consolidates Major Problems, Diagnoses, Comments, Medical Record Entries and General Patient Information into a printable **Patient History Report**.

ℹ️ The **Suppress Blank Findings From Text View** setting in System Constants determines whether DVMAX will include any blank (unfilled) Finding Items in the text view. If this setting is on, no empty Findings will be included. The **Suppress Blank Findings From Text View** setting is found in the **Clients and Patients** section of System Constants.

To view and print the Patient History Report:

- From a patient record, click the **History** tab.

- Click **Text View**.
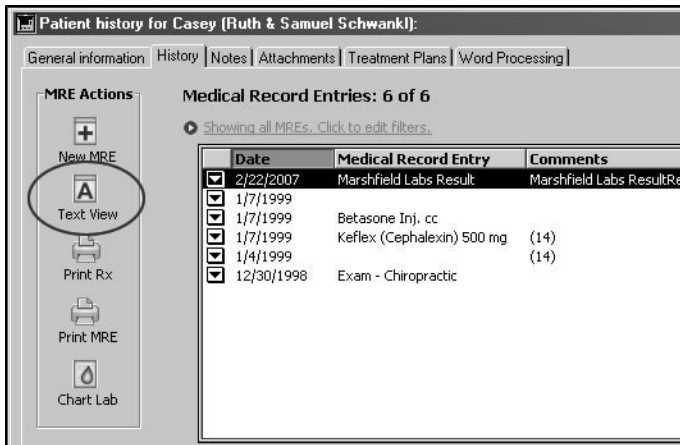
- The **Patient History Text View** window appears, containing the **Patient History Report**. Scroll up or down to review the report.
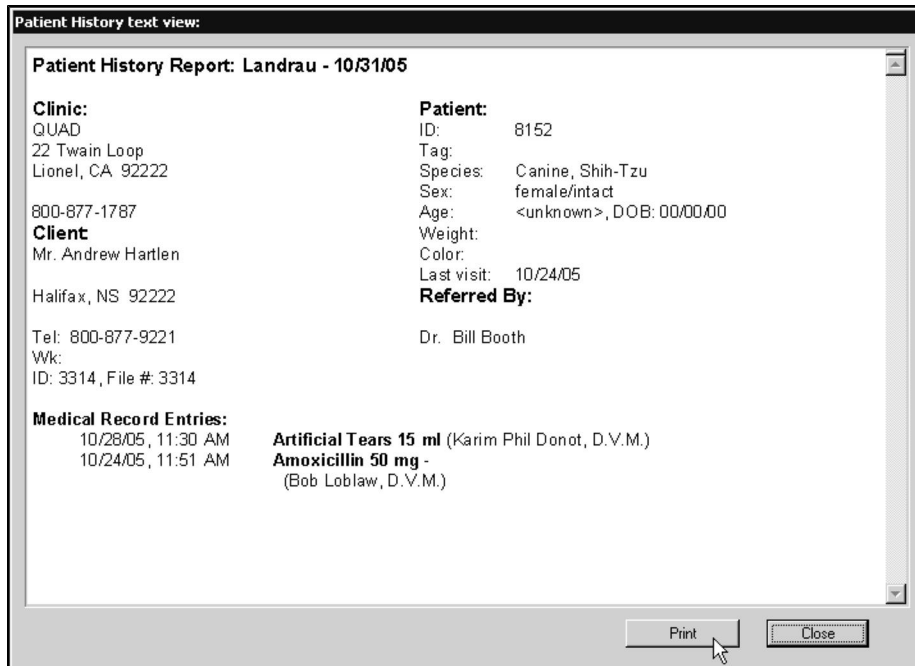
- Click **Print** to print the **Patient History Report.**

- Click **Close** in the **Patient History Text View** window to return to the **History** tab.

⚠️ MRE Filters can change the Medical Record Entries section of Text View. If MRE Filters are in effect, and the **Filters Apply to Text View** preference is set, only those MREs that match the current filters will appear in Text View. See the **MRE Filtering** chapter for more information.

Referring Vet fax numbers are now included in a patient's printed history.

The Patient name now also appears after the Patient: block in the header.

Web Patient Reporting

The Web Patient Reporting feature allows you to make the medical histories of selected patients available via the Internet to consulting specialists and other referral sources.

Web Patient Reporting: Setup Requirements

Before the Web Patient Reporting feature can be used, you will need to do the following:

- Select the patient histories that can be viewed via the Internet. This is done from the Patient History tab of each individual patient record. (See *ThePublish History to the Web Setting.*)

- Create usernames and passwords for the users (referral sources) permitted to view patient histories. (See *Creating Usernames and Passwords*.)

- Give those users, authorized to access records via the web, the web address (URL) as well as their assigned username and password.

- From the **User Settings** tab under **System Constants**, make sure the Web Server is running (See *Web History Preferences*).
- From the Clients and Patients tab under System Constants, identify the number of days of history you want displayed (See *Web History Preferences*).

Publish History to the Web Setting

You have the option of making each patient's history available for viewing on the internet via the Web Patient Reporting feature.

To make a patient history available via the web:

- From the Patient History tab, select **Publish History to the Web** to enable this record to be viewed via the web by authorized users.

- Click **Publish History to the Web** again to deselect. If the **Publish History to the Web** field is not selected, the record cannot be accessed via the Internet.

Creating Usernames and Passwords for Web Access

Before you can offer access to a patient history via the web, you will need to create a username and password for all authorized users. To create a username and password:

- From the **Section** drop-down menu, choose **Clients and Patients**.
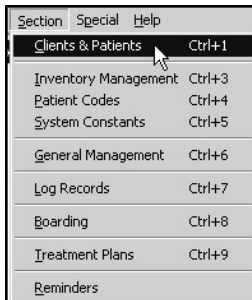
- From the **Search For** menu on the Find window, choose **Referral Source**.
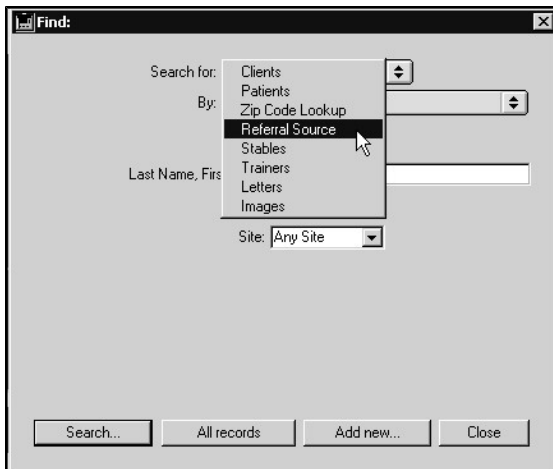
- Click **Add New** to create a new referral source record.

-OR-

- If you want to assign a username and password to an existing referral source, type the name of the source (or partial name) in the **Last Name, First Name** field; or click **All Records** and select the source name from the Referral Sources list. This will bring up the existing record.

- If this is a new referral source record, you will need to complete the Referral Source information area on the record window before you can assign the source a username and password.

- In the Web Account area, create a unique **Username** and **Password** for the Referral Source. **Usernames** and **Passwords** must be 6-12 characters long and may contain letters and/or numbers.

- Click **OK** to save the referral source record.

- Supply the referral source with their unique username and password, as well as the web address (URL) for the Patient History site (see *Viewing Patient History via the Web*).

Web History Preferences

There are a few preferences under **System Constants** that will need to be configured to make sure the web reporting facility functions correctly. You will need to ensure that the web server is running and you will need to identify the number of days of patient history you want to display.

Starting the Web Server

In order to use the web-based features of DVMAX, the web server must be running. To enable the web server:

- From the **Section** drop-down menu, choose **System Constants**.

- From the **User Settings** tab, click **Start Web Server** in the Web area to start the server and enable the web reporting function.

- Type the number of the web server port in the **Web Server Port** field.

- Click **Set Port ID**.

- From the Confirm window, select **OK** to test the web connection. If the connection is functioning, you will see a message confirming this.
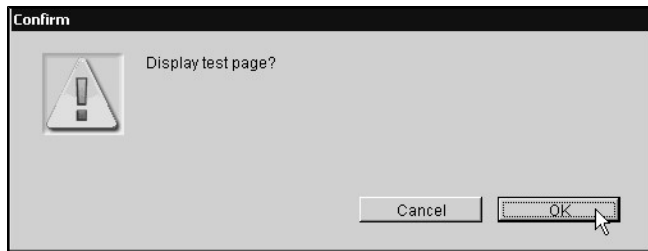
- Select **Start Web Server Automatically** if you wish to have the web server restart when the server that runs DVMAX is restarted.

- Click **Stop Web Server** to stop the server and disable the web functions.

⚠ If you select **Start Web Server Automatically**, the web server will restart automatically when the server that runs DVMAX is restarted. However, if you choose **Stop Web Server**, the web server will not start again until you select **Start Web Server**. This is true even if **Start Web Server Automatically** has been selected.

Number of Days of History to Display

You will need to identify the number of days of animal history you would like displayed when using web history. To set the number of days:

- From the **Section** drop-down menu, choose **System Constants**.

- Select the **Clients and Patient Settings** tab.

- From the Web History Preferences area, type the number of days of history you want displayed when using the web reporting function. For example, if you entered 90, then the web history would display medical record entries that had been entered in the past 90 days from the current date.
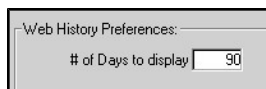
Viewing Patient History via the Web

To view patient history via the web:

- From your web browser, launch the Web Patient Reporting site using the supplied web address (URL).

- Enter your username and password as assigned by the referring clinic (see *Creating Usernames and Passwords*).

- DVMAX will check for a referral source that matches the username and password you provide. A list of all patients that have that referral source will be shown.

- From the list of patient records, click on the name of the patient whose medical history you want to view.

- The medical history of the patient will be displayed.

ℹ️ A user will only be able to view the patient histories for patient records in which they have been noted as a referral source. Check the patient record under the General Information tab to see if a referral source has been entered.

ℹ️ Don't forget, DVMAX Anywhere App for iPhone and iPad let's you look at Appointments and Patient History. Visit the Apple App Store to download the free app. For more information, contact DVMAX Technical Support.

Patient Notes Tab

The Patient **Notes** tab consists of two areas: Major Problems and Comments. DVMAX can automatically put notes in these areas.

You can add, change or delete text in either of these areas at any time.

Major Problems

As its name implies, the **Major Problems** field contains the most important patient history entries. You can also use it to record other critical health-related information.

Placement of Notes into the Major Problems Area

DVMAX can automatically place notes into the Major Problems field. The following actions will cause DVMAX to place a note into the Major Problems field:

- If a Medical Record Code (MRC) has the "Major Problem" setting selected, DVMAX will insert the current date, MRC Description and MRC default Note, if any, on a new line at the beginning of the Major Problems area. DVMAX will insert the Major Problem note when the MRC is added to the patient history, or when a Bill Item linked to the MRC is added to an invoice. See *Medical Record Codes* and *Bill Items* for more information.

- If a Diagnosis has the "Major Problem" setting selected, DVMAX will insert the current date, the Diagnosis, and the Diagnosis' Default Note, if any, on a new line at the beginning of the Major Problems area. DVMAX will insert the Major Problem note when the Diagnosis is added to the patient history.

- If a Patient is marked as deceased or subsequently revived, DVMAX will insert a date-stamped note about this action on a new line at the beginning of the Major Problems area. DVMAX will insert the Major Problem note immediately after the Patient Status change has been confirmed.

Comments

The Comments field is meant to contain notes of a more general nature than those placed in the Major Problems field. If a note does not describe a Major Problem with the Patient's health, it belongs in the Comments field.
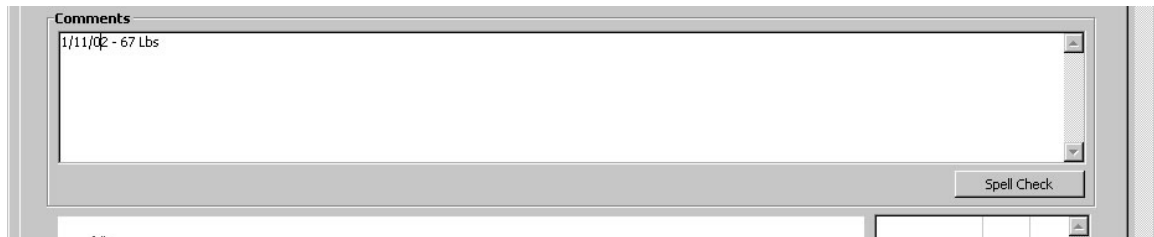
DVMAX can automatically place notes into the Comments field. The following actions will cause DVMAX to place a note into the Comments field:

- When a new rabies tag number is entered on the patient record, the previous tag number, new tag number, and date the new tag was entered are placed in the Comments field.

- When a patient's weight is updated, the new weight and current date are noted.

Patient Weight Graph

A Patient Weight Graph is available within the Notes section of the Patient History. The Patient Weight Graph automatically generates a graph based on Weight of over Time. The recorded weights and date-of-change are also listed on the side of the graph.
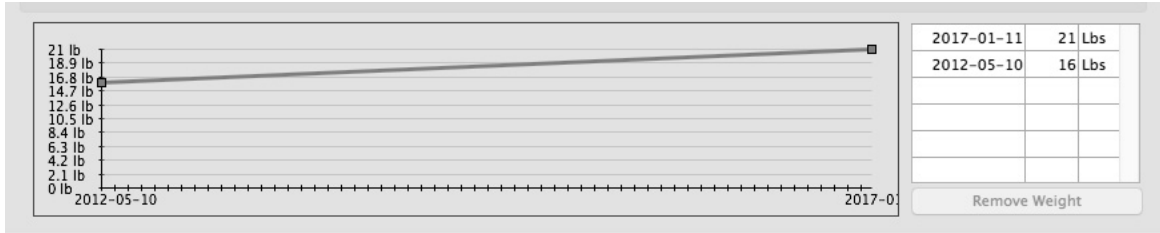
To remove a weight from the list and graph:

- Select the weight you would like remove.

- Select the **Remove Weight** button.

- The selected weight will be removed from the graph and listing.

Treatment Plans Tab

Treatment Plans tab provide a list of all treatments or To Do items due or pending for a patient. A selected treatment plan item can be recorded as a MRE in the associated patient record by selecting an item on the list and clicking **Perform**. Completing a treatment plan item also adds the associated bill item to an invoice.

Adding a Standard Treatment Plan to a Patient Record

To add a Standard Treatment plan to a Patient record:

- Open a Patient Record.

- Select the **Treatment Plans** tab.

- To choose a Standard Treatment plan, select the **Select** button.

- The **Select a Standard Treatment Plan** window will appear.

- Select one of the listed Treatment plans

- Click **Select**.

- The Treatment Plan window will open.

- Make any required changes to the Treatment plan.

- Select **OK.**

The Treatment Plan is the added to the Treatment Plan list. Once the Treatment Plan is in the list you are able initiate this Treatment Plan. To Perform a Treatment Plan:

- Select the Treatment Plan from the list.

- Select **Perform**.

- The Treatment plan window displays.

- Make any edits to the treatment plan

- Select **OK.**

Adding a New Treatment Plan to a Patient Record

To add a New Treatment plan to a Patient record:

- Open a Patient record.

- Select the **Treatment Plans** tab.

- Click **Create**.

- The **Create a Treatment Plan For** window will open.

- Click **Add**.

- Create the Treatment plan including Code, Quantity, Duration, Frequency, Duration and notes.

- Select **OK**.

The New Treatment Plan is the added to the Treatment Plan list. Once the Treatment Plan is in the list you are able initiate this Treatment Plan. To Perform a Treatment Plan:

- Select the Treatment Plan from the list.

- Select **Perform**.

- The Treatment plan window will open.

- Make any edits to the treatment plan

- Select **OK**.

Create a Treatment Plan

A treatment plan can only be added or built from a patient record. To build a treatment plan:

- From a patient record, select the **Treatment Plan** tab.
- Click **Create** to build a custom plan, or choose **Select** to load a saved plan.
- This opens the Treatment Plan window.
- In the **Name** field, type a name for the Treatment Plan. If you choose a saved plan, the name of the plan will already be defined.
- From the Treatment Plan window, click **Add**. This opens the individual Treatment Plan Item detail window.
- From the Treatment Plan Item window, type an MRC in the **Code** field.
     -OR-
- Type a partial code and press <TAB> to display an MRC lookup window, then select a code from the list.
- In the **Quantity** field, type the quantity of the selected procedure to administer each time treatment is given. For example, type the number of tablets of a medication to be administered per treatment. If 3 tablets are to be given at each interval, the Quantity is 3. For procedures such as exams, the Quantity is typically 1 per interval.
- Type the unit of measurement as it relates to the administered procedure (if applicable) in the **Units** field.
     - If you want to use the Schedules option, click the **Use Schedule** checkbox. The **Interval** drop-down list will be replaced with a **Schedule** drop-down list, and a First Day Times field will display below the Duration field.

- Choose a start time from the **Start Delay** drop-down list or type a Start code. The Start off-set value determines when the treatment plan should begin.
- Choose an interval from the **Frequency** drop-down list or type a Frequency (interval) code. This indicates how often to administer the treatment. If you clicked the **Use Schedule** check-box, the **Frequency** drop-down list will be replaced with a **Schedule** drop-down list.
- Select the duration from the **Duration** drop-down list or type a Duration code. This iden-tifies how long the treatment plan is to continue.
- If you selected the **Use Schedule** checkbox, a **First Day Times** field will be displayed below the **Duration** drop-down list. The number of available **First Day Times** fields will range from 1 to 4, depending on the **Schedule** you selected. For example, if you chose **BID** from the **Schedule** list, there will be 2 **First Day Times** fields available and a default time will display in the **Time 1** and **Time 2** fields.

  ℹ️ The **Use Schedule** option allows you to chose pre-set times for repeated events, giving you further control over scheduling delivery of treatment plan items. Schedules can have up to 4 fixed treatment delivery times per day, depending on what you select from the Schedule drop-down list. First Day Times are defined as the scheduled daily delivery times for the treatment plan item.

  - The **# Items To Be Created** field indicates the total number of items created by the Treatment Plan. This number is calculated automatically after you have entered **Start**, **Frequency** or **Schedule** and **Duration** values.

- Add notes or comments where needed in the **Comments** field.
- Click **OK** to add the item to the Treatment Plan.
- You will be returned to the Treatment Plan window. The Treatment Plan item details appear in the columns in the **Items** area.
- The Treatment Plan item summary line appears in the **Treatment Plan** field on the bottom half of the Treatment Plan screen.
- If you want to add more items to the Treatment Plan, click **Add** to repeat the Add To Do Item process.

The Word Processing Tab

You can use the Word Processing window to write letters and other correspondence to your clients, utilizing templates and accessing relevant client, patient and financial information. This section of the documentation concentrates on the Patient Word Processing Palette, which pro-vides easy access to patient information while you are working in the word processing window on a Patient Record.

For a complete discussion of using the Word Processor, see *Word Processing*.

The Patient Word Processing Palette
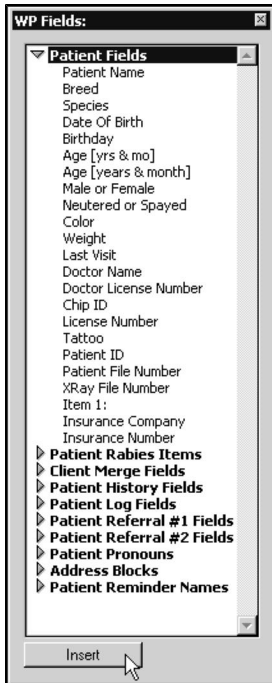
The **Patient Word Processing Palette** allows you to easily insert patient information into a document on the Word-Processing window of a Patient Record.

Open the Patient Word Processing Palette

To open the Patient Word Processing Palette at any time while working on a Patient Word Processing window:

- Click the **Show Palette** button in the lower left of the WP window.
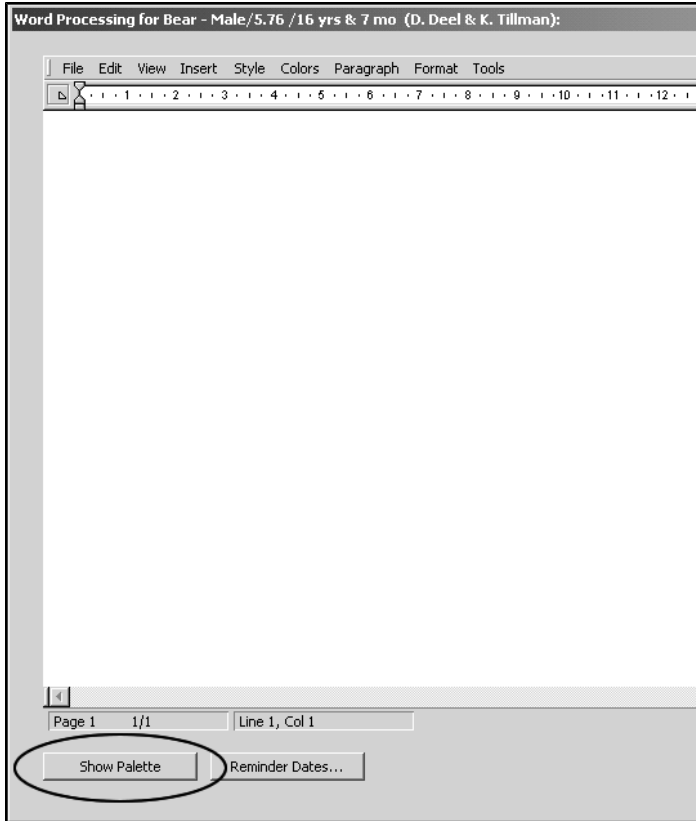
Close the Patient Word Processing Palette

To close the Patient Word Processing Palette at any time while working on a Patient Word Processing window:

- Click the **Close** field ('x') in the upper right corner of the Palette.

- OR -

- Click the **Hide Palette** button in the lower left of the WP window.
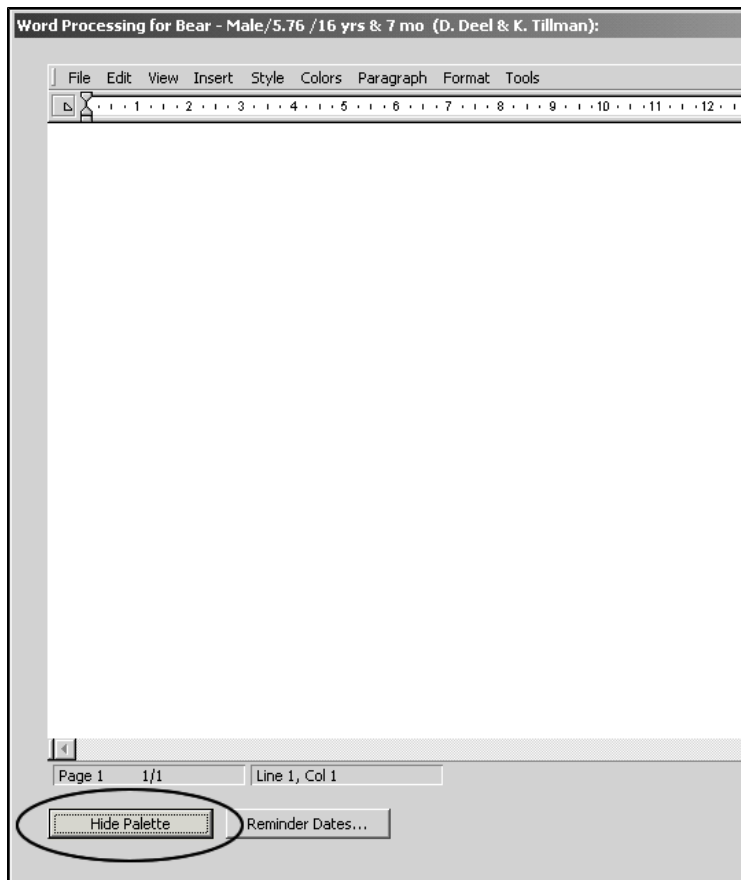
Using the Patient Word Processing Palette

To use the Patient Word Processing Palette, simply click an information field on the palette, then click **Insert** at the bottom of the palette. DVMAX will place the selected information into the word processing document at the current cursor position. Double clicking a field name in the Palette is a shortcut for inserting that field.

ⓘ Holding down the Shift key on your keyboard while inserting an item from the Word Processing Palette will capitalize the text you are inserting.

The Patient Word Processing Palette is broken down into 10 main "groups" of references:

1. *Patient Fields* insert information from the client record onto a document.

2. *Patient Rabies Items* inserts information about the client's patients onto a document.

3. *Client Merge Fields* inserts pronouns and other special items related to patient information onto a document.

4. *Patient History Fields* insert information about the referral source for this client.

5. *Patient Log Fields* insert the Client or practice address onto a document.

6. Patient Referral #1 Fields
7. Patient Referral #2 Fields
8. Patient Pronouns

9. Address Blocks
10. Patient Reminder Names

⚠️ Adding information through the **WP Palette** creates a reference to that field from the current client record, as opposed to copying that information from the current client record. This means that if you insert the client's "name" onto the document, then that document can display the name of whichever client record you are viewing at the time you load the document.

Client Merge Fields

Inserting any of the Client Merge Fields will place that information from the client record into the document.
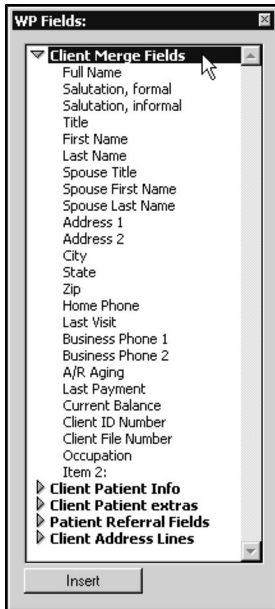
Client Patient Info

Client Patient Info references allow you to insert information a group of patients belonging to this client.
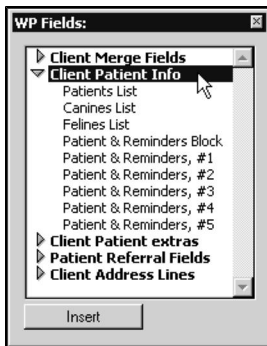
⚠️ These references can deal only with groups of a client's patients. To write about an individual patient, use the Word Processing Palette on the Patient Word Processing window.

Patients List: Inserts a list of all living patients that belong to this client. DVMAX separates this list by commas if there are more than 2 patients and by "and" if there are only 2 patients.

Single patients are listed alone. This makes it easy to write a sentence like "We welcome *Fluffy, Suzie, and Munch* to our practice!"

Canines List: Similar to the Patients list command except that it inserts living canines only. DVMAX identifies which patients are canines by comparing their species code to that specified for canines in System Constants - Client & Patient settings.

Felines List: Similar to the Patients list command except that it inserts living felines only. DVMAX identifies which patients are felines by comparing their species code to that specified for felines in System Constants - Client & Patient settings.

Patient & Reminders Block: Inserts a block of text listing all patients due for reminders as well as the procedures for which they are due. The system determines which patients are due based on the criteria of your most recent search for reminders.

The block will show the patient names on the left, and then include a list of reminders for which they are due to the right. This list of reminders is built from the "short note" field in the Reminder Type record. The block will include all patients that are due, and is very useful if you send reminder letters to your clients to inform them when their animals are due for their vaccines, etc. It is not recommend for use on reminder cards because it may easily exceed the size of a single card.

See *Reminders* for more information.

Patient & Reminders #1 through #5: These commands insert a single line, one for each patient belonging to this client that is due for reminders. Each line is constructed in the same fashion as the Patient & Reminders block, with the patient name on the left, and the list of reminders slightly to the right.

Using the separate lines it is possible to build a compact document for printing onto a postcard. This makes it possible to send a single reminder card that refers to multiple patients to a client.

Client Patient Extras

Client Patient Extras words your document so that it reads correctly regardless of how many patients you are addressing.

To use these commands, locate the type of "extra" you want to add (*Pluralize, is or are, they or he-she, their or his-her, them or him-her*). Then select the "group" of patients on which DVMAX will base the "extra" (*All Patients, Canines, Felines, Reminders*).

For example, if you were writing to welcome a new client to your practice, you might write: "We want to welcome your *pet* to our practice!" But this would only be correct if the client has only one pet. If they have several animals, you would have to write: "We want to welcome your *pets* to our practice!"

Pluralize: will add an "s" wherever it is inserted if the referred group has more than one patient. Thus "We welcome your pet to our practice" can automatically become "We welcome your pets to our practice".

Is or are: provides the right form of "is" or "are" depending on how many animals you are referring to. For example: "Your pet is going to feel right at home in our practice" can automatically become "Your pets are going to feel right at home in our practice".

They or he-she: provides the right pronoun for the number of animals you are referring to. For example: "We know that *he* will feel comfortable with our staff" can become "We know that *they* will feel comfortable with our staff". In the case of just one animal, DVMAX will automatically select the appropriate pronoun (he or she) based on the sex of the animal.

Their or his-her: provides the right possessive pronoun depending on the number of animals you are referring to. For example: "We will write again when *his* vaccines are due" can automatically become "We will write again when *their* vaccines are due". DVMAX will automatically select the appropriate pronoun (he or she) based on the sex of the animal.

Them or him-her: provides the right pronoun depending on the number of animals. For example: "We know you love *him,* so be sure to come back for your free follow-up exam" can become "We know you love *them,* so be sure to come back for your free follow-up exams".

Patient Referral Fields

Patient Referral Fields allow you to insert information from the Client referral source onto a letter or other document. The fields are self-explanatory.
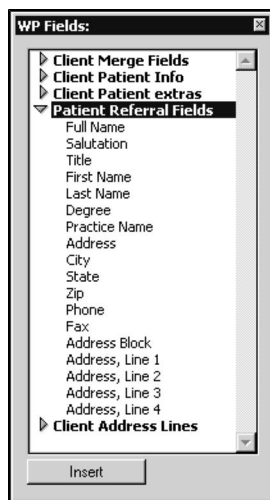
Client Address Lines

Client Address Lines allow you to insert the client's address onto a letter or other document easily.

Using this menu you can also insert the Practice name, address, and telephone number. This is useful since it will change automatically if the practice should move to a new location.

Below is a list of the other commands and their functions:

Address Block: inserts the complete client address as a single block.

Address, Line 1-4: inserts the client's address line-by-line. Using these separate lines makes it possible to include text to the right of the address if this is required.

POSTNET Code: calculates and inserts a US Postal Service POSTNET delivery code to aid in delivery of your letter. In order to use this feature you must have a printable POSTNET Bar Code Font installed on your computer. The POSTNETcode must be printed using this font and in an appropriate location on your document so it can be read by the Postal Service.

Practice Name: inserts the practice name onto your document. The practice name is taken from System Constants.

Practice Address, line 1 (etc.): inserts the lines of the practice address into your document. The address lines are taken from System Constants.

Practice telephone: inserts the practice telephone number into your document. The practice telephone is taken from System Constants.

Pay Methods

A Pay Method is a form of payment accepted by your practice, such as cash, check, Debit, Visa or MasterCard. Pay Methods in DVMAX allow you to keep track of how your clients are paying invoices or other transactions. Settings in individual Pay Methods determine the default notes DVMAX shows when recording payments on invoices, whether to print a deposit slip for the payment type as part of the End of Day report, and whether this Payment Method appears as an option on the tear-off sheet printed on statements for Equine customers.

Pay Methods and Integrated Credit Card Processing

⚠ To enable payment processing using the integrated credit card processing functionality, DVMAX needs to create 2 specially named pay methods, one for credit card and one for debit card payments. These methods will have the abbreviations **cCard** and **Debit**, respectively, and are created during the Payment Terminal setup process (Step 7 of 8). These pay method code names are automatically reserved by DVMAX for this purpose, and cannot be in use elsewhere in your DVMAX database. If they are, those existing codes will have to be renamed when you run the **Payment Terminal Setup Wizard**. See the *Integrated Credit Card and Debit Card Processing* chapter for further information.

Search For a Pay Method

To locate a Pay Method record in DVMAX:

- Choose **Inventory Management** from the **Section** 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** choose **Pay Methods** from the **Search By** drop-down list.
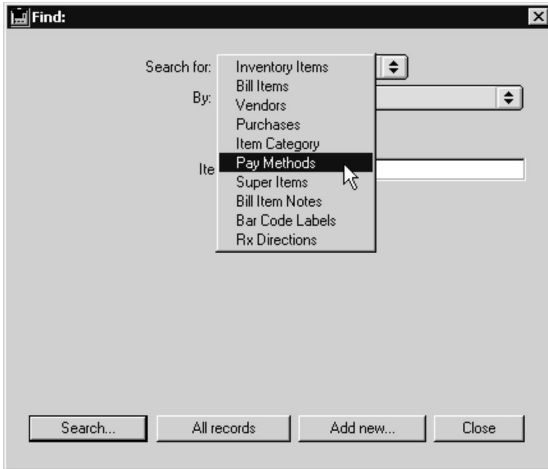
- Choose **Pay Methods** from the **Search By** drop-down list.

- Choose a criterion from the **By** drop down list.

- To search existing Pay Methods by code or abbreviation, choose **Pay Method Code**. To search for a word in the complete name of the Pay Method, choose **Keyword in Description**.

- Click **Search**.

- If there is more than one match for your search, the Payment Method List window will appear, containing a list of items that matched your search.
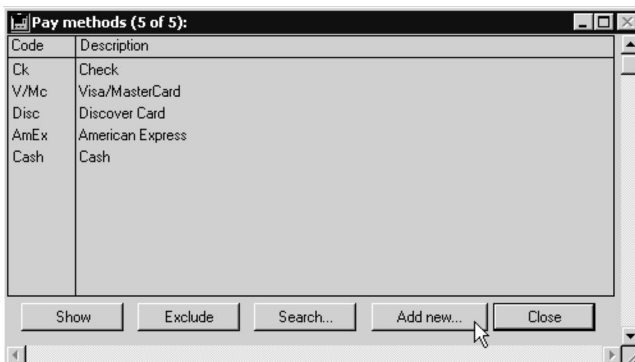
- If there is only one Payment Record that matches your criteria, DVMAX will open that Payment Record.
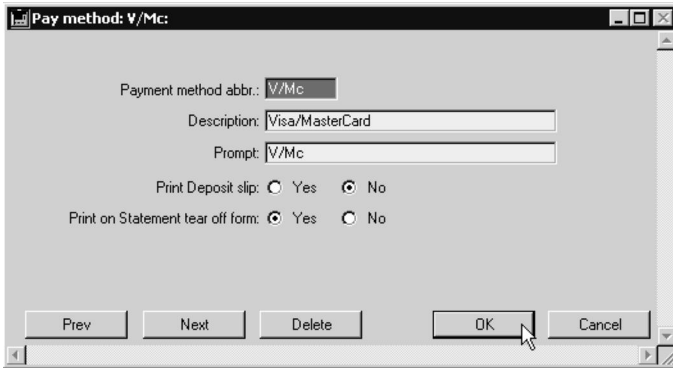
- If there are no matches, DVMAX will display a message to that effect and return you to the Find window to search again.

ⓘ You can also quickly locate a Pay Method by following the steps in *List All Pay Methods* and double-clicking the one you are interested in from the list.

List All Pay Methods

To list all Pay Methods available in DVMAX:

- Choose **Inventory Management** from the **Section** menu.

- From the **Find Window** choose **Pay Methods** from the **Search By** drop-down list.
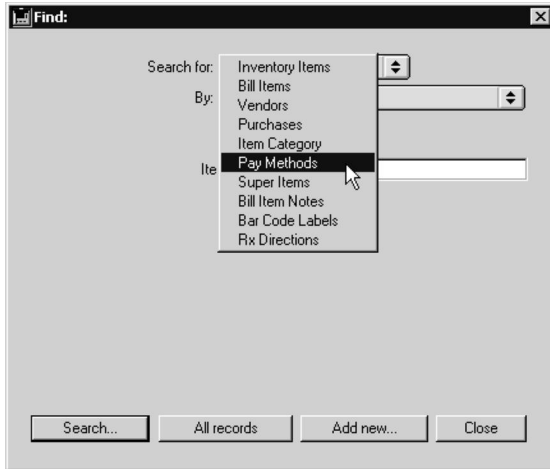
- Choose **Pay Methods** from the **Search By** drop-down list.
- Click **All Records** at the bottom of the **Find Window**. A list of all available Pay Methods appears.
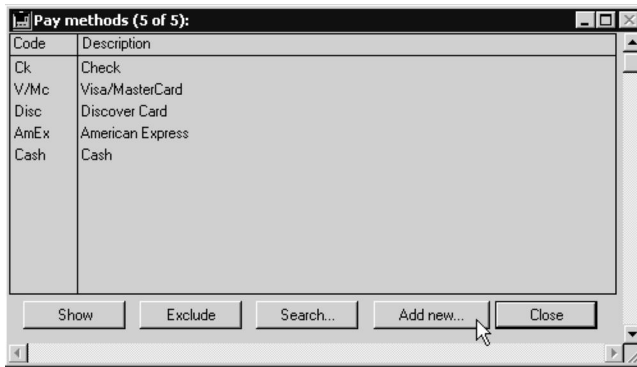
- Each Pay Method is listed on an individual line, with columns for code and description.

Creating a New Pay Method

To enable DVMAX to accept a new form of payment:

- Choose **Inventory Management** from the **Section** menu.

- From the **Find Window** choose **Pay Methods** from the **Search By** drop-down list.
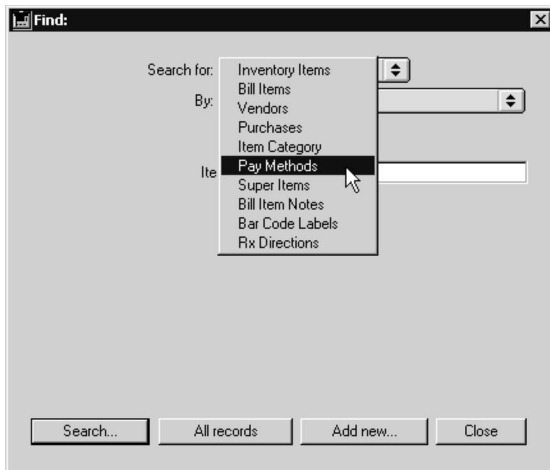
- Click **Add New**. A blank Pay Method window opens.
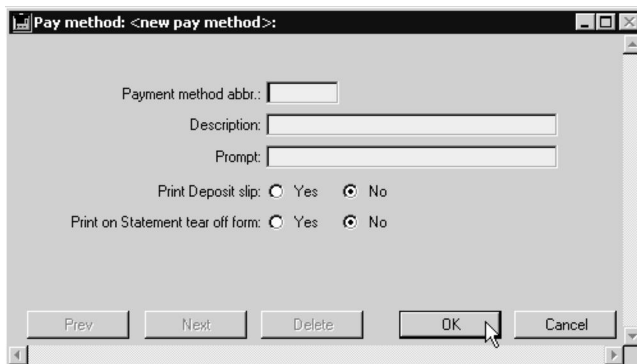
- Type a unique code for this Pay Method in the **Pay Method Abbr** field. This is the code you will use when accepting payments of this type. The code can be up to 6 characters long.

- Type a description of this Pay Method into the **Description** field. This is typically the full name of the Pay Method, and can be up to 20 characters long.

- Type a word or phrase that will prompt further information about this Pay Method into the **Prompt** field. For example, if the Pay Method is "check", the Prompt would be "Check Number". What you type here will appear in the **Pay Note** field on an invoice and the **Deposit Note** field on an Estimate when this Pay Method is chosen.

- Click the **Yes** radio button beside **Print Deposit Slip** if you want a deposit slip for this Pay Method printed along with the End of Day Report. Click the **No** radio button if you do not.

- Click the **Yes** radio button beside **Print on Statement Tear-Off Form** if you want this Pay Method printed as an option on the tear-off sheet printed on statements for Equine customers.

- Click **OK** to save the Pay Method.

Delete a Pay Method

⚠️ DVMAX does not recommend deleting a Pay Method

To delete a single Pay Method from DVMAX:

- Find and open the Pay Method you wish to delete. See *Search for a Pay Method Record.*

- Click the **Delete**.

- DVMAX will ask you to confirm that you want to delete the Pay Method.

- Click **Delete**.

To delete multiple Pay Methods from DVMAX:

- List all Pay Methods (see *List All Pay Methods*).

- Click to select the Pay Methods you wish to delete.

ℹ️ Press and hold the SHIFT key to select multiple adjacent Pay Methods from the list. Press and hold the CONTROL key to select multiple non-adjacent Pay Methods.

- Choose **Delete Records** from the **Pay Methods** menu.

- DVMAX will ask you to confirm that you want to delete the Pay Methods.
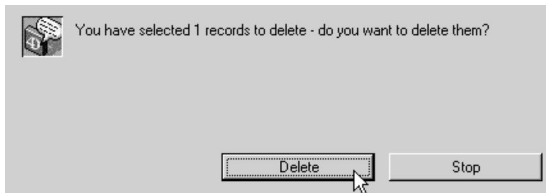
- Click **Delete**.

Pending Items

The **Pending Items** icon on the Command Palette allows you to see the status of all patients and next tasks in your hospital or practice. You can quickly get a list of, and see details of:

- All patients whose status is "In Hospital"

- All appointments scheduled for yesterday, today, and tomorrow

- All Treatment Plan To Do Items due today or tomorrow, or overdue for administration (and, optionally, those that have been completed)

An Overview of the Pending Items List

Each pending item in your practice is listed on an individual line in the Pending Items list.

- For each In-Hospital Patient, DVMAX lists the patient's name, the client's name, and the reason why the patient is In Hospital.

- For each scheduled appointment, DVMAX lists the time of the appointment (using the 24-hour clock or military time), the patient and client scheduled for the appointment, and the client's home phone number.

- For each Treatment Plan To Do Item, DVMAX lists the time the item is due (using the 24-hour clock or military time), the patient and client affected by the item, and the title of the Treatment Plan Item.

About Times in the Pending Items List

A minus sign (-) in front of a listed time means that the item is overdue or occurred in the past. The time indicates the time yesterday.

A plus sign (+) in front of a listed time means that the item is scheduled for tomorrow. The time indicates the time tomorrow this item is due or scheduled.

If there is no sign in front of a listed item, the item is due or scheduled today. The time indicates the time today this item is due or scheduled.

Viewing the List of Pending Items

To view the list of Pending Items:

- Click the **Pending** icon on the Command Palette.
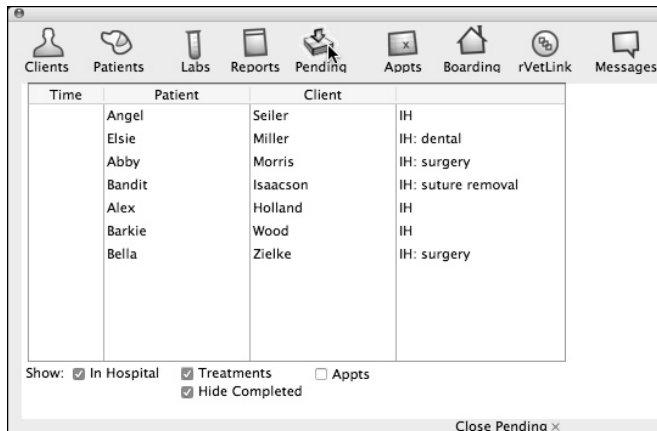
- The Command Palette expands to show a list of pending items in your practice. By default, DVMAX shows all pending items, excluding Completed Items.

ℹ️ If you have filtered the list of pending items (see Filtering the List of Pending Items), DVMAX will remember your choices from the last time you viewed pending items.

- You can view details or take action (where applicable) on any pending item by double clicking it.

- If necessary, use the scrollbar to the right of the Pending Items list to scroll through the list.

- To close the **Pending** items drop down list, click **Close Pending** in the bottom right corner of the window.

Filtering the List of Pending Items

You can narrow the list of Pending Items to see only those types you are interested in. DVMAX will remember your choices and show you only the items you choose until you make other choices.
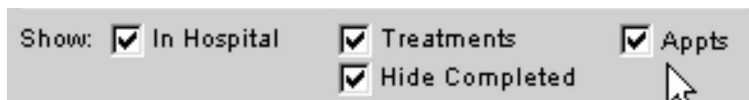
To filter the list of **Pending** Items:

- Click to select or deselect any combination of the checkboxes at the bottom of the Pending Items list.

For example, to see only Appointments, select the **Appts** checkbox, and deselect **In Hospital** and **Treatments**. By default, all **Pending** item types are selected.

The Hide Completed Checkbox

The **Hide Completed** checkbox applies only to Treatments listed in the Pending Items list. Selecting the **Hide Completed** checkbox will remove from view any Treatment Plan items that have been "done" or marked as completed. Deselecting the checkbox will show all pending Treatment Plan Items regardless of their completion status.

In Hospital and Appointment Pending Items are unaffected by this checkbox.

Prescriptions

DVMAX's Prescription features let you write prescriptions and create prescription labels in a few quick steps. As well, DVMAX keeps a list of all prescriptions for which refills are available and makes it easy to select and print labels for existing prescriptions.

Write a New Prescription

You can write new prescriptions and create prescription labels from a patient or client record. To refill an existing prescription, see **Prescription Refills**.

To write a new prescription:

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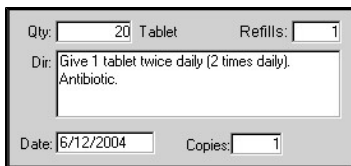
  -OR-

- When in a patient record, choose **Print Rx** from the **History** tab.

- A Prescription Labeling window opens. You can write a new prescription, set the number of refills and print a prescription label from this window.

- Select a prescription item from the items list.

ⓘ The fact that an item appears on this list does not mean it is available in inventory, only that it is an item for which an inventory record exists. See *Prescription Items and Inventory Management*.
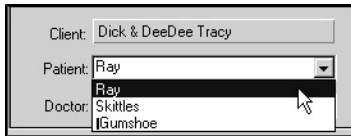
- In the **Expiration Date** field, type the product expiration date if required.

- The **Lot Number** and **Rx Number** are provided by DVMAX as applicable.

- Type the quantity of the prescription item, such as number of tablets, in the **Qty** field. The Unit is provided automatically, based on your bill item setup.

- Type the number of refills in the **Refills** field. The default value is 0.

- Type the refill expiration date in the **Refill Expiry Date** field where needed.

- Modify the directions in the **Dir** field if needed. The default directions are set under **Inventory Management**.

- Type the date of the prescription in the **Date** field. The current date is provided by default.

- In the **Copies** field, type the number of copies of the prescription label you would like printed. The default value is 1.
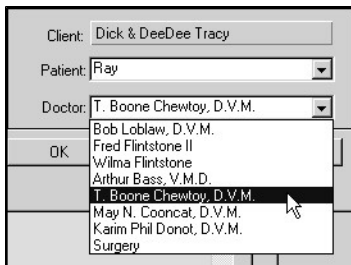
- If applicable, select the patient for which the prescription is intended from the **Patient** drop-down list.

Only patients associated with the Client shown will be listed under the **Patient** drop-down list.

- From the **Doctor** drop-down list, select the prescribing doctor.

- Click **OK & Print** to print the label.

-OR-

- Click **OK** to save the label without printing.
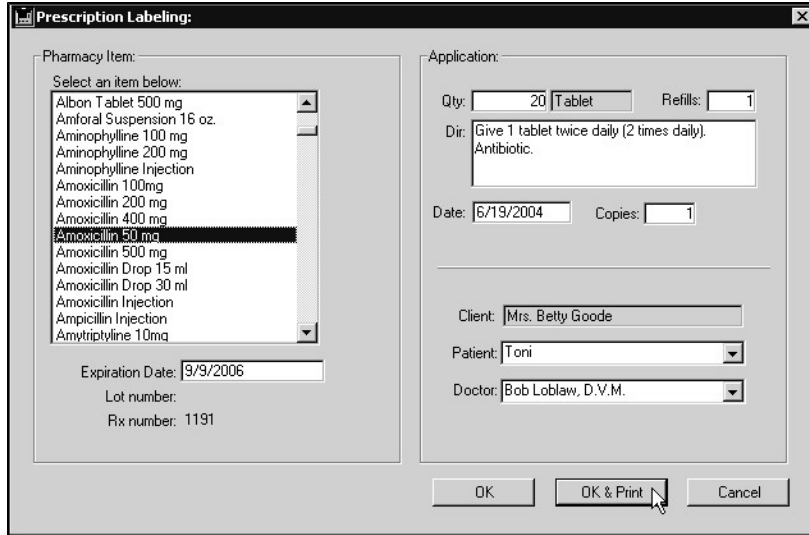
# Using Mnemonics in Prescription Labeling Directions

DVMAX allows you to use mnemonics when adding directions into a prescription-labeling field.

To use mnemonics to search for prescription labeling instructions:

- Search for the **Patient**.
- Create an invoice for this Patient containing a relevant prescription item.

   -OR-

- Add a prescription-related MRE from the **History** tab.
- The **Prescription Labeling** dialog will open.
- In the **Directions** field type a known mnemonic, such as TID and press <Tab>.
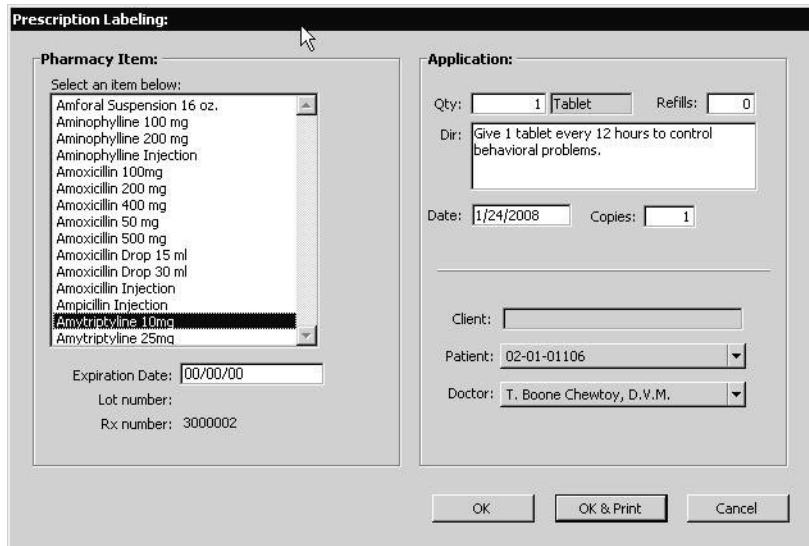
- A pick-list of **RX Directions** will open containing the mnemonic you typed.
- Select the appropriate directions.

- Select **OK**.
- The directions will now be inserted into the **Directions** field.

Creating a New Prescription (Rx) Directions Record

To create a new Prescription (Rx) Directions record:

- Select **Inventory Management** from the **Section** drop-down menu.
- From the **Search For** menu, choose **Rx Directions**.
- Select **Add New**.
- A new **Rx Directions** record window opens.

- Add the new **Direction Code** (a brief mnemonic to use for these directions)**, Description,** and Rx **Directions** (as they will display on the Rx label) in the appropriate fields.
- Select **OK** to save the new Rx Directions record.

Prescription Refills

The **Refill Rx** feature allows you to quickly prepare prescription details and produce a label for a refill. This feature is accessed through a patient record. The **Refill Rx** feature is only available to a patient with at least one existing prescription for which refills are available. To create a new prescription, see *Write a New Prescription.*

To refill a prescription:

- From a patient record, click **Refill Rx**. This button will only be available if there is an existing refill.

- From the **Prescription List**, select the prescription item you want to refill. This list contains all of the prescriptions for the current patient for which refills are

available.

- Click **Refill**.

- The **Prescription Labeling** window opens. The prescription item you selected will be highlighted in the item list area.

- Update or confirm prescription details and print a prescription label as required. The process is very similar to writing a new prescription.

 You cannot select a different item on the list when refilling a prescription. To write a new prescription, see *Write a New Prescription*.

- Type the product expiration date if required.
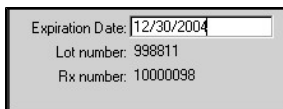
- The **Lot Number** and **Rx Number** are provided by the system as applicable.

- Type the quantity of the prescription item, such as number of tablets, in the **Qty** field, if different from the default value.

- Type the refill expiration date in the **Refill Expiry Date** field (MM/DD/YYYY) where needed.

- The number of refills is indicated in the **Refills** field. This value cannot be altered here, as it was established by the original prescription. It will be automatically adjusted each time a refill is issued.

- Directions cannot be modified on a prescription refill. The label will indicate the original number of refills and the number remaining, where applicable.
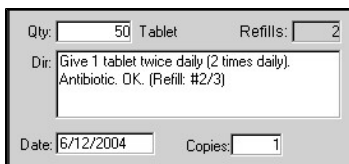
- Type the date of the refill in the **Date** field. The current date is provided by default.

- In the **Copies** field, type the number of copies of the prescription label you would like printed. The default value is 1.

- The name shown in the **Patient** field is the one for whom the refill is issued. No other selection can be made.

- From the **Doctor** drop-down list, select the prescribing doctor.

- Click **OK & Print** to print the label.

-OR-

- Click **OK** to save the label without printing.
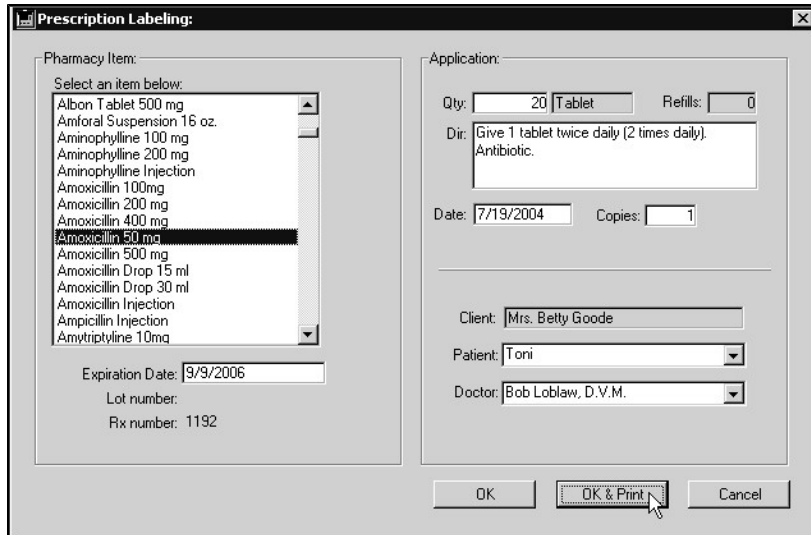
Dismissing Prescription Refills

If you have prescribed the wrong medication, or have otherwise supplied incorrect information while writing a prescription (e.g. doctor, patient, directions), you can dismiss or delete the remaining refills, so that the invalid prescription cannot be refilled.

To dismiss a prescription refill:

- From a patient record, click **Refill Rx**. This button will only be available if there is an existing refill.
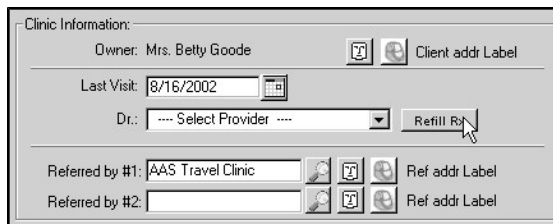
- From the **Prescription List** dialog, click the prescription you would like to dismiss.

- Click **Dismiss Refill** at the bottom of the **Prescription List**.
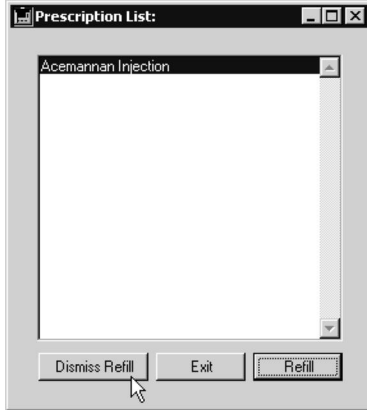
Prescription Items and Inventory Management

Prescription items can be added, deleted or modified from the Inventory Management area of DVMAX.

- To modify, view, add or delete an inventory item, select **Inventory Management** from the **Section** drop-down menu; then choose **Inventory Item** from the **Find** window. Refer to the chapter on *Inventory Management* for more information.

Ignore Prescription Lot Information

There is an option on the **Invoice Settings** tab under **System Constants** that allows you to ignore prescription lot information for prescription labeling. If **Ignore Rx Info for Prescription Labeling** is selected, the system will use whatever lot information is on hand, or proceed with the prescription labeling even if there is not enough in the existing lots to fill the current prescription or refill.

To ignore prescription lot information for prescription labeling:

- From the **Section** drop-down menu, choose **System Constants**.

- Select the **Invoice Settings** tab from the **System Constants** window.

- Click **Ignore Rx Info for Prescription Labeling**.

- 819 -
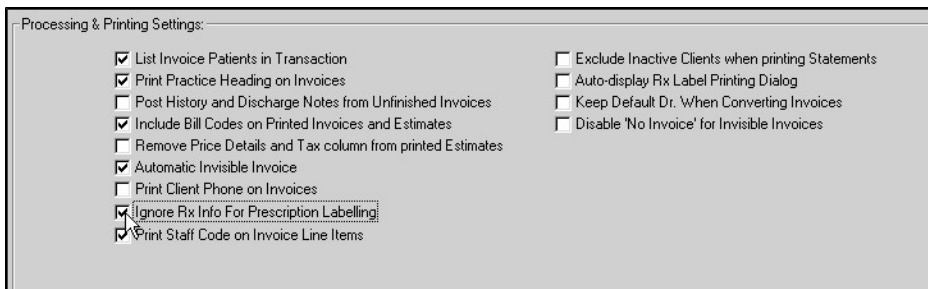
- Click again to deselect.
- As with any changes to the **Systems Constants** settings, all workstations must restart in order for any changes to take effect.

Purchases

DVMAX uses Purchase records to document the purchase or order of Inventory Items. Purchase records can record the receipt of actual purchased items by your practice (Inventory Purchases), or can document the ordering of Inventory with Purchase Orders.

The price recorded for an Inventory Item on a Purchase record can update the Inventory cost and the sale price of that Item. Inventory adjustments are documented with Purchase records, reflecting losses or miscounts. Purchase records also track internal consumption of Inventory Items by your practice.

In order to successfully create a Purchase record, you must have already defined a Vendor record for the vendor you are purchasing from, and an Inventory Item record for the Inventory Item you are purchasing. See **Vendors** and **Inventory** for related information.

Purchase Processing

Purchasing inventory items through a Purchase record has the following effects in DVMAX:

- The **Quantity on Hand** field of the Inventory Item record is updated to reflect the quantity purchased. Purchases from standard vendors are always measured in "purchasing units" for these calculations.

- DVMAX will update the **Last Cost** of an Inventory Item if the cost on a Purchase record is higher than the existing **Last Cost** for that Inventory Item. Lower costs on a Purchase record will not update **Last Cost**. See **Inventory** for more information.

- If the Inventory Item's **Last Cost** has changed because of this Purchase, DVMAX will recalculate the sale price of any Bill Items that use this cost for their pricing calculations and which are set to update inventory prices automatically. See **Bill Items** for more information.

Exceptions to these effects arise when you use the Adjustment or Hospital Vendors on a Purchase record. See **Correcting a Purchase Record**, **Making Inventory Adjustments**, and **Recording Hospital Use of Inventory**.

Purchase Order Processing

A Purchase Order has the following effects in DVMAX:

- Each Inventory Item on the Purchase record is marked as "On Order".

- The order quantity and cost is recorded for each Inventory Item. This information will be used when the actual Purchase is received and the Purchase Order is converted. See **Converting a Purchase Order**.

⚠ Only standard vendors (i.e. not the "Adjustment" or "Hospital" vendor) can be used for a Purchase Order entry.

An Overview of the Purchase Record

A Purchase record in DVMAX contains the Purchase or Purchase Order number in the title of the window. The Purchase record screen is divided into three areas: the Vendor/Handling area, which contains information about the vendor and whether this purchase is a Purchase Order or not; the Line Items area, which lists the actual items purchased; and an area containing comments about this purchase and financial information.

Listing All Purchases

To list all Purchases in DVMAX:

- Choose **Inventory Management** from the **Section** drop-down menu.

- From the **Find** window, choose **Purchases** from the **Search For** drop-down menu.

- Click **All Records** at the bottom of the **Find** window.
- The **Purchases List** appears, containing all recorded Purchases in DVMAX.

The Purchases List

The Purchases list displays one Purchase record per line. There are columns for Purchase Number, PO, Date, Purchase Total, Freight, and Vendor Name. (See **An Overview of the Purchase Record** for more detail).

Opening a Record from the Purchases List

To open a purchase record from the Purchases list that displays following a search of purchase records:

- From the Purchases list, double click a selected purchase to view the record.

Search from the Purchases List

- Click **Search** to run a new **Purchase** or other **Inventory Management** search.

-OR-

- Choose **Search** from the **Purchases** drop-down menu.

- The **Find** dialog opens. See the section titled **Search For Purchase Records** for more detail.

Creating a New Purchase from the Purchase List

- Click **Add New** of the Purchase List

-OR-

- Choose **Add New** from the **Purchases** drop-down menu.

- A new Purchase record window opens. See **Recording a Purchase by Creating a New Purchase Record** for more information.

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.

Converting a Purchase Order from the Purchases List

The Purchases List allows you to convert one or more Purchase Orders to regular purchases. You would do this when the inventory ordered arrives at your practice.

When a Purchase Order is converted to a purchase, DVMAX will update the Inventory Item being purchased so that it is no longer marked as **On Order**. See **Inventory Items** for more information.

To convert a Purchase Order on the Purchase List to a regular Purchase:
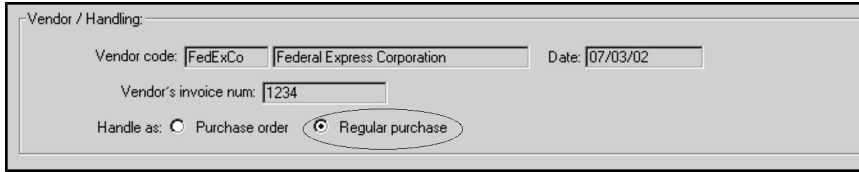
- Click to select the Purchase Order you wish to convert.

ℹ️ Purchase Orders are marked in the **PO** column of the Purchases List.

- Click the **Convert PO** button.

- DVMAX will duplicate the selected Purchase and open the copy. The **Regular Purchase** radio button will be selected on the copy.

- Click **OK** to save the converted Purchase Order.

You can also convert a Purchase Order from an open Purchase Record. See **Converting a Purchase Order** for more information.

⚠️ DVMAX actually duplicates the Purchase record containing the Purchase Order, rather than modifying the Purchase Order itself. This leaves you with a record of the original Purchase Order, and also provides you the opportunity to record partial shipments of items in a Purchase Order.

Searching for Purchase Records

To find a Purchase Record in DVMAX:

- Select **Inventory Management** from the **Section** drop-down menu.

- From the **Find** window, select **Purchases** from the **Search For** drop-down list.

- Click to select a criterion from the **By** drop-down list. See **Purchase Search Criteria** for information on possible choices.

- Type a Purchase Number, Vendor Code, or Vendor Invoice Number in the box below the **By** drop-down list.

- Click **Search**.

- If there is more than one match for your search, the **Purchase List** window will appear, containing a list of items that matched your search.

- If there is only one Purchase that matches your criteria, that Purchase Record will open.
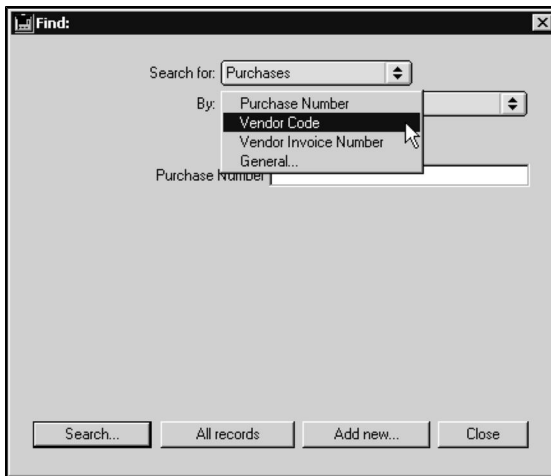
- If there are no matches, DVMAX will display a message to that effect and return you to the **Find** window to search again.

Purchase Record Search Criteria

DVMAX lets you search for purchase records by Purchase Number, Vendor Code, and Vendor Invoice Number.

- Choose **Purchase Number** from the **By** drop-down list to search for Purchases by the number DVMAX has assigned them.

-OR-

- Choose **Vendor Code** from the **By** drop-down list to find Purchases made from a specific Vendor.

-OR-

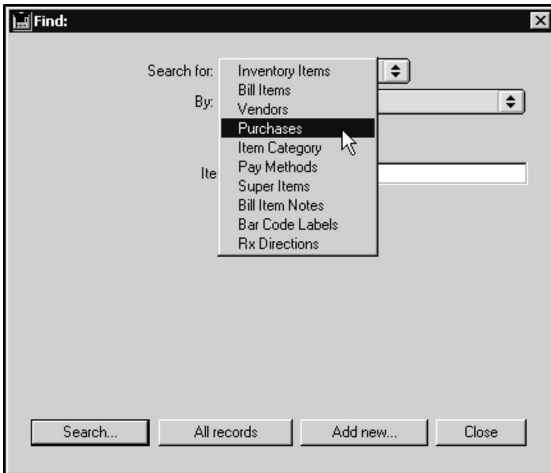- Choose **Vendor Invoice Number** if you have the Invoice number for the Purchase at hand.

Create a New Purchase Record

You record a purchase or purchase order in DVMAX by creating a Purchase record. You can record more than one actual purchase or purchase order on a Purchase record. You cannot record a purchase order and an actual purchase on the same Purchase record. To create a new Purchase record:
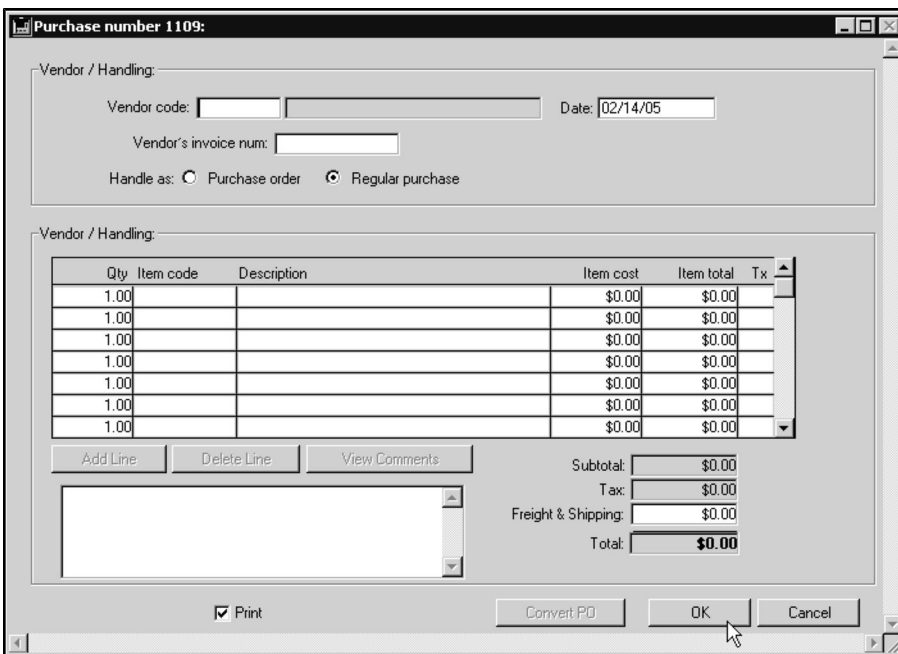
- Choose **Inventory Management** from the **Section** drop-down menu.

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

- Click **Add New**.

- A new Purchase Record appears. The title of this Purchase Record contains the sequential ID of this purchase as assigned by DVMAX.

ⓘ You can also create a new Purchase Record by clicking the **Add New** button at the bottom of the **Purchases List**. See The Purchases List for more information.

- Type an existing Vendor Code into the **Vendor Code** field. See **Vendors** for more information on Vendor Codes.

ⓘ If do not know or cannot remember an exact Vendor Code, type the first letter into the **Vendor Code** field and press TAB. This will bring up the **Select Vendor Code** window listing all of existing vendor codes.

- If necessary, type a date other than the current date into the **Date** field.
- Type the vendor's invoice number to your practice for this purchase into the **Vendor's Invoice Num** field.
- Click to select the **Purchase Order** radio button if you are recording the ordering of a product.

-OR-

- Leave the **Regular Purchase** radio button selected if you are recording the actual receipt of a product.

⚠ If you select **Purchase Order,** any Inventory Items listed on the line items of this Purchase Record will be marked as **On Order** on their respective Inventory Item records. See Inventory Items for more information.

⚠ Only standard vendors (i.e. not the "Adjustment" or "Hospital" vendor) can be used on a Purchase Order entry.

- Complete a line item for each item purchased. For each item purchased, type the **Quantity** and **Item Code**. DVMAX will automatically complete the Item Cost, Item Total, and Tx fields. See **Purchase Record Line Items** for more information.

Qty	Item code	Description	Item cost	Item total	Tx
1.00			$0.00	$0.00	
1.00			$0.00	$0.00	
1.00			$0.00	$0.00	
1.00			$0.00	$0.00	
1.00			$0.00	$0.00	
1.00			$0.00	$0.00	
1.00			$0.00	$0.00	

⚠ The <Enter> key is NOT a synonym for the <Tab> key, or the <Return> key. 4D has a built-in feature where the <Enter> key is used for one specific purpose - accepting a record that's being displayed in an input form. The <Enter> key is like clicking **Save** or **OK** on a form. Because this is a built-in feature of 4D, using the Enter key in the wrong context (as in, when entering a partial code in a line item) can cause odd results. If you want to move from field to field - use the <Tab> key.

- Type any comments about the purchases recorded on this Purchase record into the Comments field. For instance, items may have been received damaged or incomplete.

- Type any freight, shipping, handling or delivery costs into the **Freight & Shipping** field.

- If you wish to print this Purchase record when you complete it, leave the **Print** checkbox selected.

-OR-

- If you do not wish to print this Purchase record when you complete it, click to deselect the **Print** checkbox.

- Click **OK** to save the Purchase Record. If the **Print** checkbox is selected, DVMAX will also print the Purchase.

Purchase Record Line Items

Each distinct type of item on a Purchase record occupies a single line in the **Line Items** area of the Purchase record screen. For example, if you are purchasing two cases of dog food and one case of cat food, your Purchase record will have two line items: one for the dog food and one for the cat food.

To complete a Line Item on a Purchase Record:

- Type the quantity of the item you are purchasing into the **Qty** box.

- Type the Inventory Item Code of the item you are purchasing into the **Item Code** box.

ℹ️ If do not know or cannot remember an exact Item Code, type the first letter into the **Item Code** field and press **TAB**. This will bring up a window listing all existing codes.

- If necessary, replace the **Item Cost** with the per-unit cost of the item (i.e. how much you paid for each quantity of the item).

ℹ️ DVMAX automatically places the **Last Cost** of an Inventory Item into the **Item Cost** field. See Inventory Items for more information.

Adding a Purchase Record Line Item

To add a line item to a Purchase record:
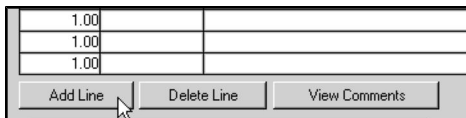
- Click **Add Line** below the line items area.

Deleting a Purchase Record Line Item

To delete a line item from a Purchase record:

- Click in the **Qty** or **Description** field of the line you wish to delete.
- Click **Delete Line** below the line items area.

The Pharmacy Item Lot Entry Dialog

When you add a prescription Inventory Item to a Purchase record, DVMAX will present you with a **Pharmacy Item Lot Entry** dialog.

```
Pharmacy Item Lot Entry:

Enter the Lot number and expiration of this lot (enter only
one lot per line):

Lot number: [            ]
Expiry date: [00/00/00]

     [ OK ]      [ No Entry ]
```

To complete the **Pharmacy Item Lot Entry** dialog:

- Type the Lot Number and Expiry Date of the prescription item into the appropriate fields.
- Click **OK** to save the Lot Number and Expiry Date information.

-OR-

- Click **No Entry** to dismiss the dialog without saving the Lot Number and Expiry Date information.

See **Inventory Items** for more information on Item Lots.

Viewing Comments from a Line Item

To view the comments from Inventory Item listed on a Purchase record line item:

- Click in the **Item Code** field of the item whose comments you wish to view.
- Click **View Comments**.

DVMAX will display the comments from the selected Inventory Item record in a dialog. For more information on Inventory Item comments, see **Inventory.**

Converting a Purchase Order

You can convert a purchase order to a regular purchase when the inventory you have ordered arrives at your practice.

When a Purchase Order is converted to a purchase, DVMAX will update the Inventory Item being purchased so that it is no longer marked as **On Order**. See **Inventory Items** for more information.

To convert a Purchase Order to a regular Purchase:

- Locate and open the Purchase Record you wish to convert. See **Searching for and Finding Purchase Records**.

- Click **Convert PO**.

- Click **OK** to close the Purchase record.

You can also convert Purchase Orders from the Purchases List. See **The Purchases List** for more information.

⚠ Converting a PO to a purchase will request Rx Lot information , where applicable.

⚠ DVMAX actually duplicates the Purchase record containing the Purchase Order, rather than modifying the Purchase Order itself. This leaves you with a record of the original Purchase Order, and also provides you the opportunity to record partial shipments of items in a Purchase Order.

Recording Partial Receipt of a Purchase Order

If an item you have ordered is on backorder, or if you receive partial shipment of an order for any other reason (for example, damaged goods that need to be returned or an incomplete shipment), you may record partial receipt of that order on a Purchase record by converting the Purchase Order and deleting the line items that were not actually received.

To record partial receipt of items on a Purchase Order:

- Locate and open the Purchase Order you wish to convert. See **Searching For and Finding a Purchase Order**.
- Click **Convert PO**.

-OR-

- List all Purchase Orders (see **Listing All Purchase Orders**).
- Click to select the Purchase Order you wish to convert from the Purchase List.

ℹ Purchase Orders are marked in the **PO** column of the Purchases List.

- Click **Convert PO**.
- At this point, DVMAX will duplicate the selected Purchase and open the copy. The **Regular Purchase** radio button will be selected on the copy.

- Click in the **Qty or Description** field of the line you wish to remove from the Purchase Order.
- Click **Delete Line**.
- Click **OK** to save the converted Purchase Order.

The Purchases List will now contain the Purchase record containing the original Purchase Order as well as the Purchase Record documenting the partial receipt of the order.

When your practice receives the remainder of the order, you may convert the original Purchase Order again, this time deleting the line items that were received previously.

Purchase Reports

You can print various reports on purchases your Practice has made. In the case of the **Freight and Shipping** report, you can also export report results to a spreadsheet-compatible text file.

See the sections **The Purchase List Report**, **The Full Purchase Report**, and **Freight and Shipping Reports** for information on each kind of Purchase Report DVMAX can generate.

The Purchase List Report

The **Purchase List Report** prints a list of selected purchases. For each purchase in the list, DVMAX shows the purchase number, date, purchase total, freight charges and vendor.

To generate a **Purchase List Report**:

- Find all the Purchases you wish to include in the report. See **Search for Purchase Records**.

   -OR-

- List all Purchases (see **Listing All Purchases**) and click to select the Purchases you wish to include in the report from the Purchases list.

ⓘ Press and hold the SHIFT key while clicking to select multiple adjacent Purchases from the list. Press and hold the CONTROL key (COMMAND on Macintosh) to select multiple non-adjacent Purchases.

- Choose **Print** from the **File** drop-down menu.
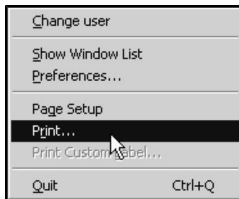
- The **Printing Options** dialog opens.
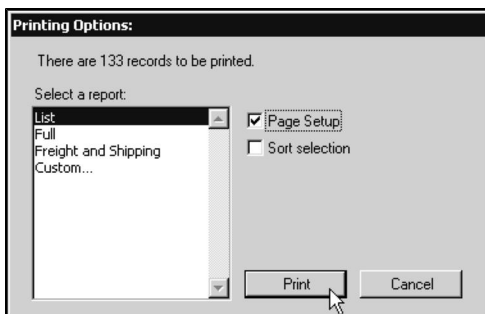
- Click to select **List** from the **Select a Report** list.
- Click to select the **Page Setup** checkbox if you wish to display your operating system's Print or Page Setup dialog to specify print options before printing the report.
- Click to select the **Sort Selection** checkbox if you wish to display the **Order By** dialog to sort the list of Purchases on the report before printing.
- Click **Print**.
- DVMAX will print the **Purchase List Report**.

The Full Purchase Report

The **Full Purchase Report** prints a report showing full details for each selected purchase. For each selected Purchase record, DVMAX shows the date, the type of purchase (Purchase Order or Inventory Purchase), purchase record number, vendor, vendor invoice number, quantity, item code and description, item cost and total, tax, freight and shipping charges, and a grand total for the purchase.

To generate a **Full Purchase Report**:

- Find all the Purchases you wish to include in the report. See **Searching for and Finding Purchases**.

    -OR-

- List all Purchases (see **Listing All Purchases**) and click to select the Purchases you wish to include in the report from the Purchases list.

ⓘ Press and hold the SHIFT key while clicking to select multiple adjacent Purchases from the list. Press and hold the CONTROL key (COMMAND on Macintosh) to select multiple non-adjacent Purchases.

- Choose **Print** from the **File** drop-down menu.
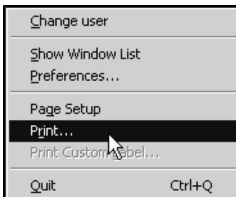
- The **Printing Options** dialog opens.
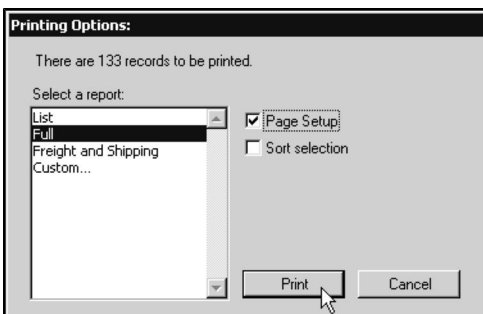
- Select **Full** from the **Select a Report** list.
- Select the **Page Setup** checkbox if you wish to display your operating system's Print or Page Setup dialog to specify print options before printing the report.
- Select the **Sort Selection** checkbox if you wish to display the **Order By** dialog to sort the list of Purchases on the report before printing.
- Click **Print**.

DVMAX will print the **Full Purchase Report**.

Freight & Shipping Reports

Freight and shipping Purchase reports allow you to see how much your practice has paid on freight and shipping for selected purchases. DVMAX provides three varieties of Freight and Shipping report: **Purchase Details**, **Vendor Totals**, and **Report Total Only**.

You can also choose to export each type of Freight and Shipping report to an Excel-compatible text file.

To generate a Freight and Shipping Purchase report:

- Find all the Purchases you wish to include in the report. See **Searching for and Finding Purchases**.

-OR-

- List all Purchases (see **Listing All Purchases**) and click to select the Purchases you wish to include in the report from the Purchases list.

ⓘ Press and hold the SHIFT key while clicking to select multiple adjacent Purchases from the list. Press and hold the CONTROL key (COMMAND on Macintosh) to select multiple non-adjacent Purchases.

- Choose **Print** from the **File** drop-down menu.
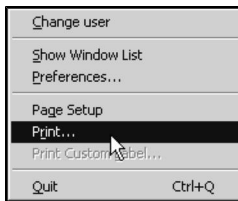
- The **Printing Options** dialog displays.
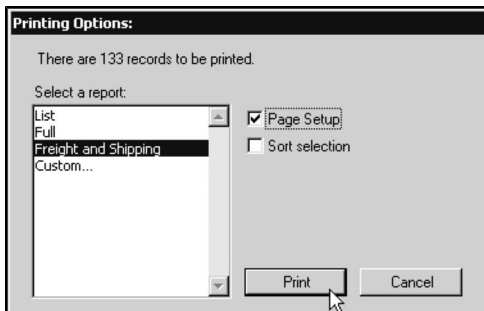
- Select **Freight and Shipping** from the **Select a Report** list.

- Select the **Page Setup** checkbox if you wish to display your operating system's Print or Page Setup dialog to specify print options before printing the report.

- Select the **Sort Selection** checkbox if you wish to display the **Order By** dialog to sort the list of Purchases on the report before printing.

- Click **Print**.

- The **Freight and Shipping Report** dialog displays.
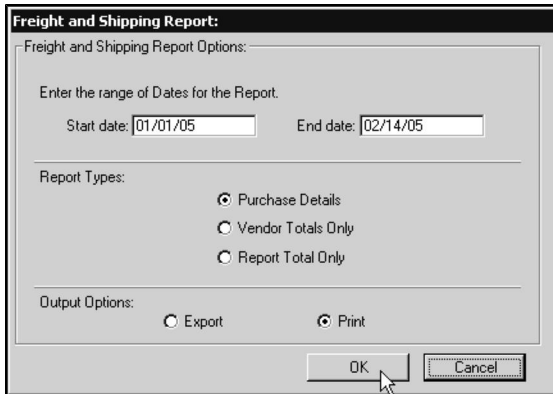
- Type a start and end date for the report into the **Start Date** and **End Date** fields.

- Click to select a **Report Type**. See the sections for each report type for more information.

- Click to select the **Print** radio button if you wish to print the report.

-OR-

- Click to select the **Export** radio button if you wish to export the report to an Excel-compatible tab-delimited text file on your computer's hard disk.

- Click **OK** to generate the report. If you selected **Export** as your output option, you will now have to save the report file on your computer's hard disk.

If you are unsure where to save the file, save it on your Desktop so it will be easier to locate. Make sure the file ends with the extension ".txt".

Purchase Details Freight & Shipping Report Type

The **Purchase Details Freight and Shipping Report** lists the purchase and vendor invoice numbers, vendor name, purchase date and total, and the freight and shipping charges for each Purchase in the date range you specify. The total number of purchases from each vendor and the number of these that incurred freight charges are also listed.

DVMAX also calculates the amount paid for freight and shipping from each vendor, and the total number of purchases, number of purchases that incurred freight charges, and the total amount paid for freight and shipping for the entire specified time period.

Vendor Totals Only Freight & Shipping Report Type

The **Vendor Totals Only Freight and Shipping Report** lists the number of purchases, number of purchases that incurred freight charges, and the total freight charges from each vendor. DVMAX also calculates grand totals for these categories for the entire time period.

Report Total Only Freight & Shipping Report Type

The **Report Total Only Freight and Shipping Report** simply lists the number of purchases, number of purchases that incurred freight charges, and the total paid in freight charges by your practice for the specified time period.

Deleting a Purchase Record

You cannot delete a Purchase record from DVMAX.

If you need to correct an erroneous Purchase record, you can make an Inventory adjustment. See **Making Inventory Adjustments** for information.

You can delete a line item from an individual Purchase record when converting it from a Purchase Order. See **Converting a Purchase Order**.

Correcting a Purchase Record

You cannot change or alter a Purchase record in DVMAX. To correct errors in price or quantity on a Purchase record, you need to create a new Purchase record that uses the Adjustment vendor.

For more information on the Adjustment vendor, see **Vendors**.

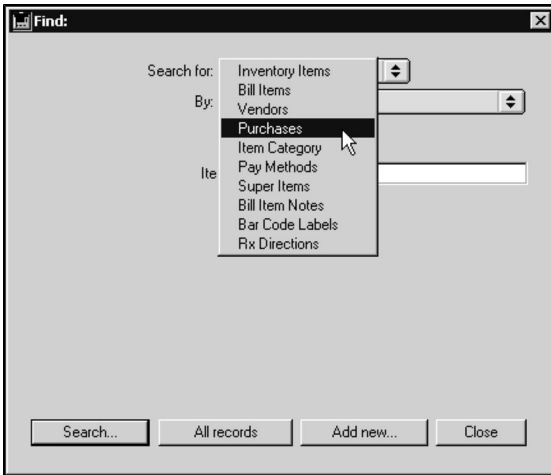# Correcting Errors in Quantity

To adjust for errors in quantity on a Purchase record, you will need the Item Code and quantity from the Purchase record you wish to correct. Since you cannot change or alter an existing Purchase record in DVMAX, to correct errors in quantity you need to create a new record that uses the Adjustment vendor.

To correct an error in quantity on a previous Purchase record:

- Choose **Inventory Management** from the **Section** drop-down menu.

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

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

- A new Purchase Record appears. The title of this Purchase Record contains the sequential ID of this purchase as assigned by DVMAX.
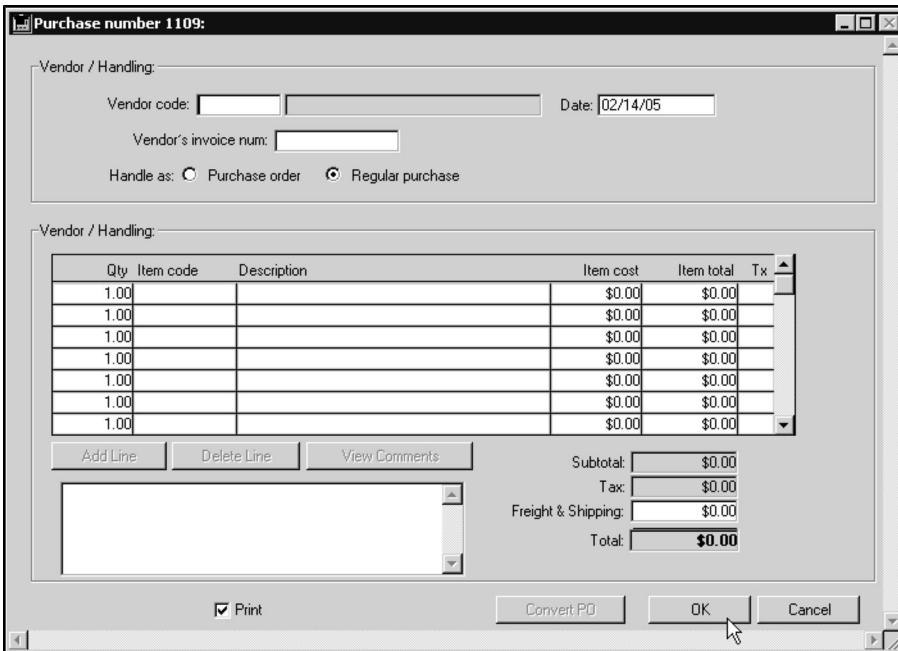
ⓘ You can also create a new Purchase Record by clicking the **Add New** button at the bottom of the **Purchases List**. See The Purchases List for more information.

- In the **Vendor Code** field type **Adjust**.

- In the **Qty** field, type the difference (either a positive or negative number) between the quantity on the purchase you are correcting and the true quantity purchased.

- Type the Item Code from the Purchase record you are correcting into the **Item Code** field.

- Click **OK** to save the adjustment record.

Correcting Errors in Price

To correct or adjust price errors on a Purchase record, you will need the Item Code and quantity of the item with the incorrect price from the Purchase record you wish to correct. Since you cannot change or alter an existing Purchase record in DVMAX, to correct errors in price you need to create a new record that uses the Adjustment vendor.
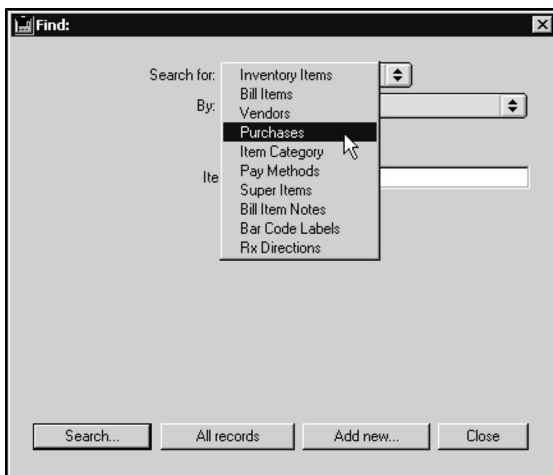
The following procedure lets you to correct the price without adding additional quantities to inventory.

To correct a price error on a previous Purchase record:

- Choose **Inventory Management** from the **Section** drop-down menu.

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

- Click **Add New**.

- A new Purchase Record displays. The title of this Purchase Record contains the sequential ID of this purchase as assigned by DVMAX.

ⓘ You can also create a new Purchase Record by clicking the **Add New** button at the bottom of the **Purchases List**. See The Purchases List for more information.

- In the **Vendor Code** field type **Adjust**.

- Type **1** into the **Qty** field.

- Type the Item Code from the line item of the Purchase record you are correcting into the **Item Code** field.

- Type the correct price into the **Item Cost** field.

- Press the <TAB> key twice to move to a new line item.

- Type **-1** into the **Qty** field on the new line item.

- Type the Item Code from the line item of Purchase record you are correcting into the **Item Code** field on the new line item.

- Type the correct price into the **Item Cost** field on the new line item.

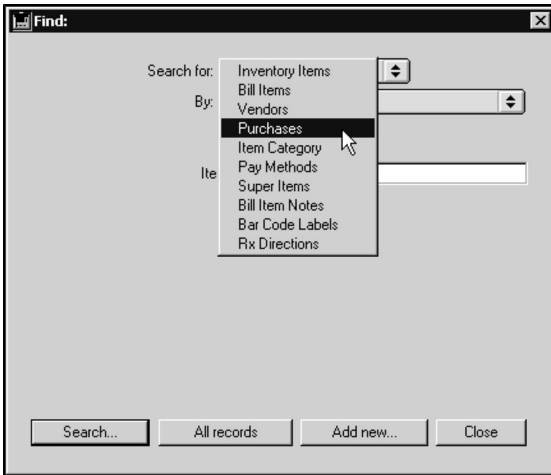- Click **OK** to save the adjustment record.

Making Inventory Adjustments

You can make a purchase using the Adjustment Vendor to correct discrepancies between manual Inventory counts and Inventory levels as calculated by DVMAX.
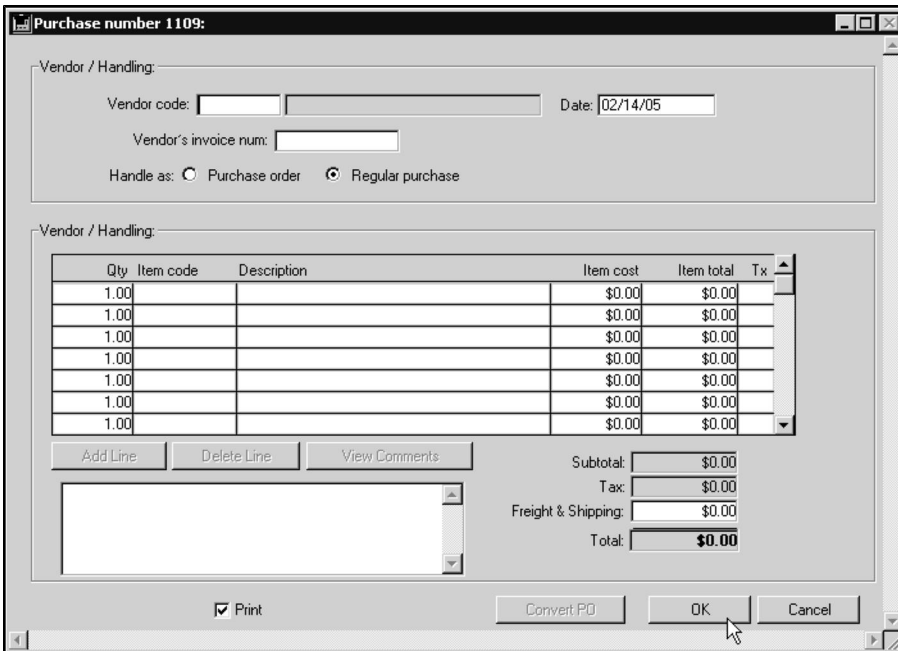
- Choose **Inventory Management** from the **Section** drop-down menu.

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

- Click **Add New**.

- A new Purchase Record displays. The title of this Purchase Record contains the sequential ID of this purchase as assigned by DVMAX.

ℹ️ You can also create a new Purchase Record by clicking the **Add New** button at the bottom of the **Purchases List**. See The Purchases List for more information.

- In the **Vendor Code** field, type **Adjust**.

- In the **Qty** field, type the difference (either a positive or negative number) between the number of Inventory Items as calculated by DVMAX and the number found in your Inventory count.

- Type the Item Code of the Inventory Item you are adjusting into the **Item Code** field.

ℹ️ If do not know or cannot remember an exact Item Code, type the first letter into the **Item Code** field and press **TAB**. This will bring up a window listing all existing codes.

- Click **OK** to save the adjustment record.

⚠️ DVMAX will not calculate any sales tax on adjustment purchases (since there is no real purchase made.) No changes are made to the **Last Cost** field for negative Adjustment Purchases (decrease in Inventory) since the adjustment does not represent a real purchase of inventory.

Recording Hospital Use of Inventory

You can record consumption of inventory by your practice by creating a Purchase from the **Hospital** vendor.

To record Inventory use by your practice, follow the procedure outlined in **Recording a Purchase by Creating a New Purchase Record**, using **Hospital** as the Vendor code.

⚠️ If a Purchase is made from the Hospital vendor, DVMAX updates only the quantity of an Inventory Item. Hospital purchases have no effect on the cost of an Inventory Item.

⚠️ Purchases made from the Hospital vendor always decrease the quantity of Inventory on hand by the quantity purchased.

⚠️ Purchases from the Hospital vendor are always measured in Dispensing units, not Purchase units, reflecting the fact that your practice uses Inventory in dispensing units (1 tablet, 1 vial, 1 package, 1 cc at a time.) All other purchases are measured in Purchasing units. For more information on Dispensing and Purchasing units, see Inventory.

Rabies Information Records

Rabies Information records contain producer (manufacturer) and lot number information for rabies vaccines used by your clinic. When you administer a rabies vaccine, DVMAX places the information from a Rabies Info record in two places:

- The patient record.
- The printed rabies certificate.

Each different brand or type of rabies vaccination injectable used in your practice must have its own Rabies Info record.

A Rabies Info record also contains a list of Reminder types that are linked to the record's vaccine. DVMAX uses these Reminder lists to distinguish rabies from other types of Reminders.

⚠ If a rabies vaccine is not linked to a rabies Reminder on a Rabies Info record, DVMAX will not be able to ask for a rabies tag number when a rabies vaccine is administered, nor will producer or lot number information be placed on the patient's record or the printed rabies certificate.

All Reminders types that use a Rabies Info record's vaccine should be listed on the Rabies Reminder list. Each Reminder that represents a rabies vaccination should only be listed on one Rabies Info record.

⚠**Listing a Reminder on more than one Rabies Info record can produce unexpected results when printing certificates.**

For more information on Reminders, see the *Reminders* chapter of this manual.

Guidelines

The following are a few guidelines for rabies information records:

- You should update the Rabies Info record before new lots of vaccine injectable are used. If the record is not kept up to date, incorrect lot number information will be placed into patient records and printed on Rabies certificates.

- If you switch rabies vaccine manufacturers, you must create a new Rabies Info record, and then remove appropriate Reminders from the old Rabies Info record and add them to the new one.

- If you regularly use rabies vaccines from different producers, or if you change producers frequently, you must create a separate Rabies Info record for each type of injectable you use. You must also create a separate Reminder type for each type of injectable you use.

- If you do not do this, DVMAX will not know which injectable was used for a vaccination, and will choose at random from Rabies Info records containing that reminder type.

- A scenario: if you have one Rabies lot for Canine and one for Feline, and they both use 1 year and 3 year reminders, it is absolutely necessary that there be 2
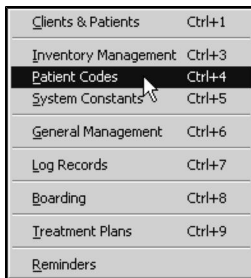
sets of 1 year rabies reminders, and 2 sets of 3 year reminders, one for each species.

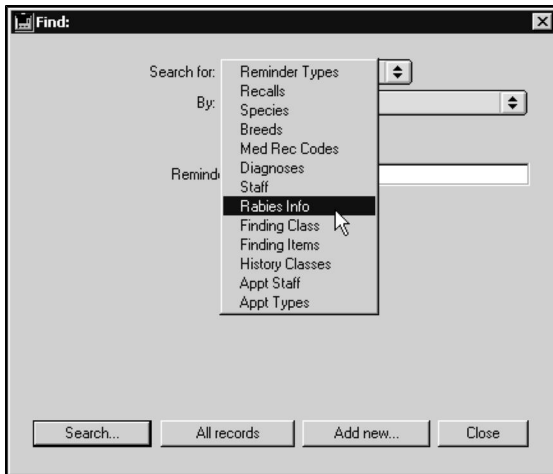- See **Reminders** for more information on creating Reminder types.

Creating a New Rabies Info Record

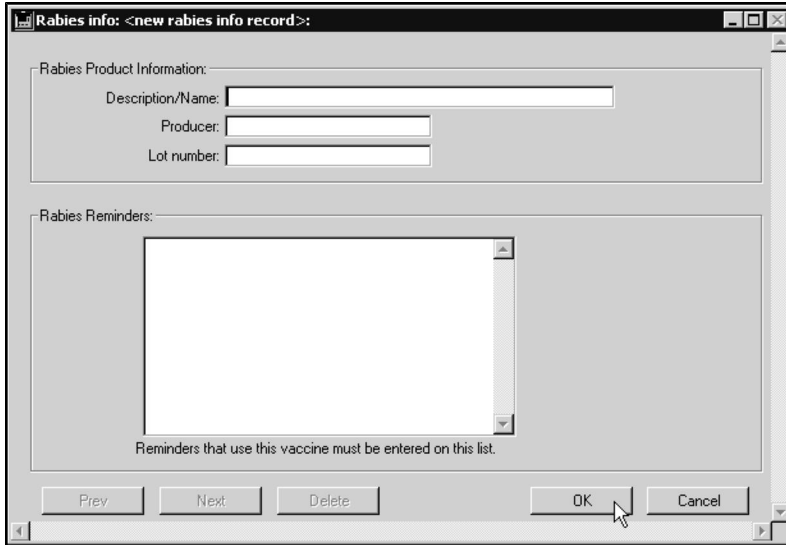**To create a new Rabies Info Record:**

- Choose **Patient Codes** from the **Section** drop-down menu on the DVMAX main screen. The **Find** window displays.

- From the **Search For** drop-down list, choose **Rabies Info**.

- Click **Add New**. A new, blank **Rabies Info** record opens.

- Type a description of the new record into the **Description/Name** field (e.g. "RabVac"). The description can be a maximum of 40 characters. If the description is longer than this, DVMAX will retain only the first 40 characters.

- Type the producer (manufacturer) of the rabies vaccine into the **Producer** field (e.g. "Rhone-Merieux"). The producer can be a maximum of 20 characters. If the producer is longer than this, DVMAX will retain only the first 20 characters.

ℹ DVMAX will print the producer on certificates when this vaccine is administered.

- Type the current lot number of the vaccine into the **Lot Number** field. The lot number can be a maximum of 20 characters. If the lot number is longer than this, DVMAX will retain only the first 20 characters.
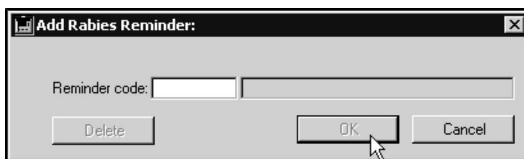
ℹ The lot number will be printed on certificates when this vaccine is administered.

- Choose **Add Reminder** from the **Rabies Reminder** drop-down menu. The **Add Rabies Reminder** dialog displays.

-OR-

- Double-click in the **Rabies Reminders** field. The **Add Rabies Reminder** dialog displays.

- Type an existing Reminder Code in the **Reminder Code** field. The reminder code you type must be one linked to the Bill Item representing this vaccine.

ℹ️ If do not know or cannot remember an exact Reminder Code, type the first letter into the **Reminder Code** field and press **TAB**. This will bring up a window listing all existing codes.

- Click **OK** to save your reminder code and return to the Rabies Info record window.

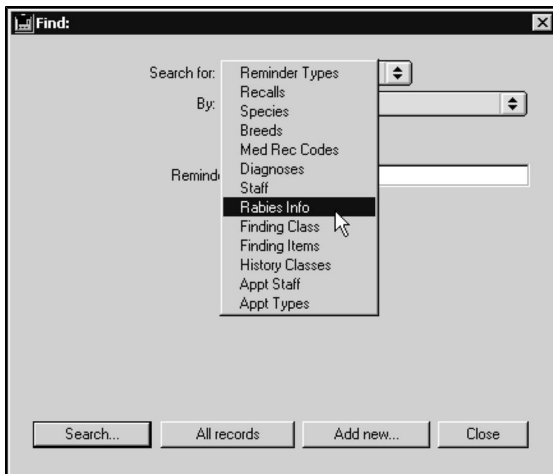- Click **OK** to save the new Rabies Info record and return to the **Find** window.

List All Rabies Info Records

To see a list of all Rabies Info records in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu on the DVMAX main screen.
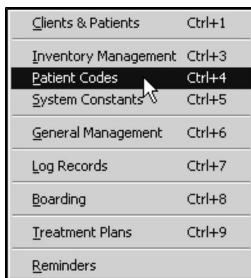
- From the **Find** dialog, click the **Search For** drop-down list and choose **Rabies Info**.
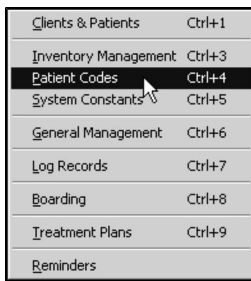

- Click **All Records**. A list of all records will display.
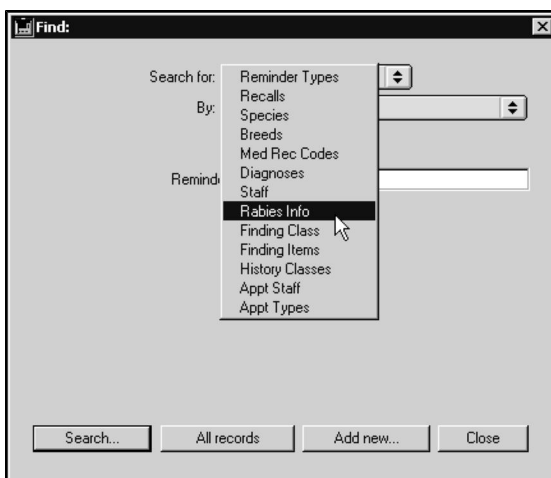
Search For Rabies Info Records

You can search for Rabies Info records by producer (manufacturer) or by the Reminder linked to the record.

To find a Rabies Info Record:

- Choose **Patient Codes** from the **Section** drop-down menu on the DVMAX main screen.

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, click the **Search For** drop-down list and choose **Rabies Info**.

Find:
Search for:
- Reminder Types
- Recalls
- Species
- Breeds
- Med Rec Codes
- Diagnoses
- Staff
- Rabies Info
- Finding Class
- Finding Items
- History Classes
- Appt Staff
- Appt Types

By:

Reminde

Search...   All records   Add new...   Close

- If you know the name of the producer of the vaccine contained in a record, type it into the **Producer Name** field. You do not need to type the entire name.

-OR-

- If you know the Reminder Code linked to the record you wish to find, choose **Linked Reminder Code** from the **By** drop-down list.

Producer Name
Linked Reminder Code
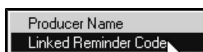
- Type the code into the **Reminder Code** field. You do not need to type the entire code.

- Click **Search**.

-OR-

- Click **All Records** to see a list of all Rabies Info Records.

- If there are multiple Rabies Info Records that match your search, DVMAX will present a list. Double-click the record you wish to view. If there is only one match for your search, DVMAX will open the matching record.

- If there are no matches, DVMAX will present a dialog telling you so.
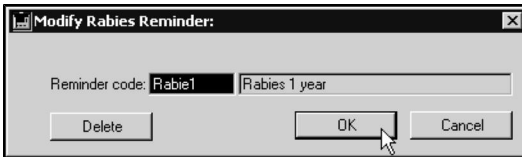
Edit a Rabies Info Record

To edit a Rabies Info Record:

- Open the Rabies Info Record you wish to edit by following the procedure outlined in **Search For Rabies Info Records**.

- Type your changes into the **Description/Name**, **Producer**, and **Lot Number** fields as required.

- To edit or delete a linked Reminder, click once on the Reminder you wish to modify in the **Rabies Reminder** field, and then choose **Modify Reminder** from the **Rabies Reminder** drop-down menu.

-OR-

- Double-click the Reminder you wish to modify in the **Rabies Reminder** field.

- The **Modify Rabies Reminder** dialog displays.

- If necessary, type an existing Reminder Code in the **Reminder Code** field. The reminder code you type must be one linked to the Bill Item representing this vaccine.

- Click **OK** to save your reminder code and return to the Rabies Info Record screen.

-OR-

- Click **Delete** to delete this Reminder and return to the Rabies Info Record dialog.

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

-OR-

- Click **Cancel** to leave the Rabies Info record unchanged.

Delete a Rabies Info Record

To delete a Rabies Info Record:

- Open the Rabies Info Record you wish to delete by following the procedure outlined in **Search For Rabies Info Records**.

- Click **Delete** to delete this record and return to the Rabies Info Record screen.

Recalls

Recalls are follow-up communications to clients about their patients, most often to do with a procedure recently undertaken by your practice on a patient. As the name indicates, recalls are often performed via a telephone call to a client.

For example, you might add a recall to a patient's record to make a post-operative call about a patient, to call to inform a client it's time to remove a patient's sutures, or to send a sympathy note to a client after a patient's death.
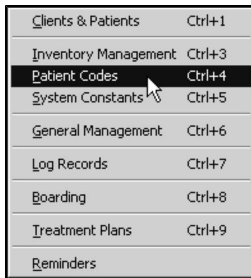
Recall records can also be linked to Bill Items. If a recall is linked to a Bill Item, the sale of that Bill Item on an invoice will automatically post or update a recall on a patient's record. See **Bill Items** and **Invoicing** for more information.

Recalls are similar in many ways to Reminders. For information on Reminders, see **Reminders**. This chapter addresses the setting up and editing of Recall records. For information about working with Recalls on a patient record, see **Working with Patient Records**.
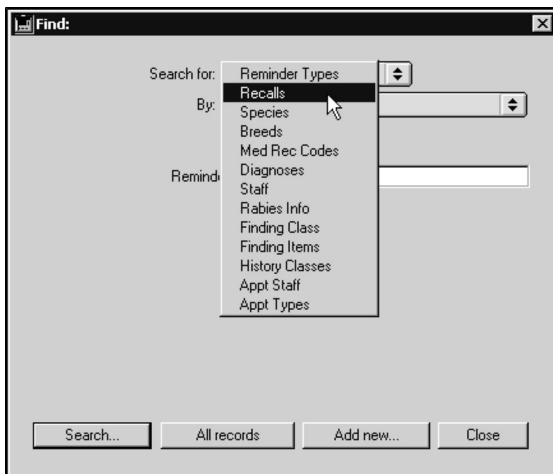
List Recall Records

To view a list of all Recall records:

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

<u>C</u>lients & Patients	Ctrl+1
<u>I</u>nventory Management	Ctrl+3
<u>P</u>atient Codes	Ctrl+4
<u>S</u>ystem Constants	Ctrl+5
<u>G</u>eneral Management	Ctrl+6
Lo<u>g</u> Records	Ctrl+7
<u>B</u>oarding	Ctrl+8
<u>T</u>reatment Plans	Ctrl+9
<u>R</u>eminders	

CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.

- The **Find** window opens.

Find:

Search for: Reminder Types
              Recalls
              Species
              Breeds
              Med Rec Codes
              Diagnoses
              Staff
              Rabies Info
              Finding Class
              Finding Items
              History Classes
              Appt Staff
              Appt Types

By:

Reminde

[Search...] [All records] [Add new...] [Close]

- Choose **Recalls** from the **Search For** drop-down list.
- Click **All Records** at the bottom of the **Find** dialog to see a list of all defined Recall records.

- Each Recall record is listed on an individual line with columns for **Recall Code**, **Reason**, **Default Delay**, **Miscellaneous** and **Survives Death**.
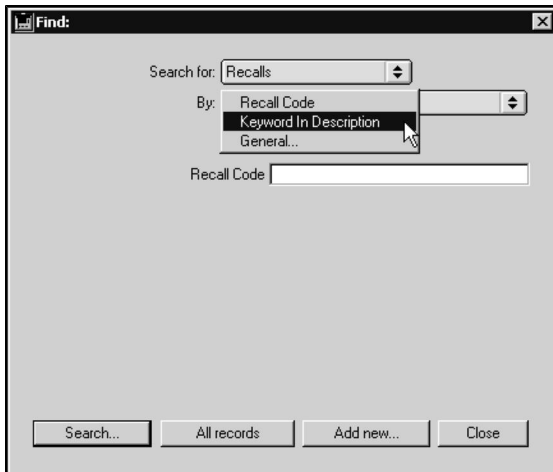
Search Recall Records

To find a Recall record:

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

ⓘ CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.

- The **Find** window opens.

- Choose **Recalls** from the **Search For** drop-down list.

- Choose **Recall Code** from the **By** drop-down list to search Recall records by code. Type a Recall Code in the Code field below the **By** drop-down list. If you are searching by code, you must type at least the first few letters of the Recall code

    -OR-

- Choose **Keyword in Description** to find Recall records by a keyword in the recall description (called the **Reason** field in the Recall record). Type a key-word or words from the Recall **Reason** into the **Keyword in Description** field below the **By** drop-down list. DVMAX will find all Recalls that contain the word or words you type in the field.

- Click **Search**.

- If there is more than one match for your search, the Recall List window will pro-vide a list of items that matched your search.

- If there is only one Recall record that matches your criteria, DVMAX will open that Recall record.

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

ℹ️ You can also quickly locate a Recall record by following the steps in **Listing All Recall Records** and double-clicking the one you are interested in from the list.

Create a New Recall Record

To create a new Recall record:

- Choose **Patient Codes** from the **Section** drop-down menu.
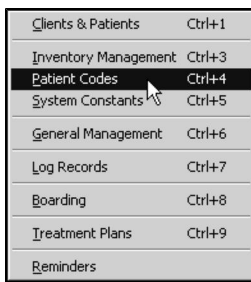
ⓘ CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.
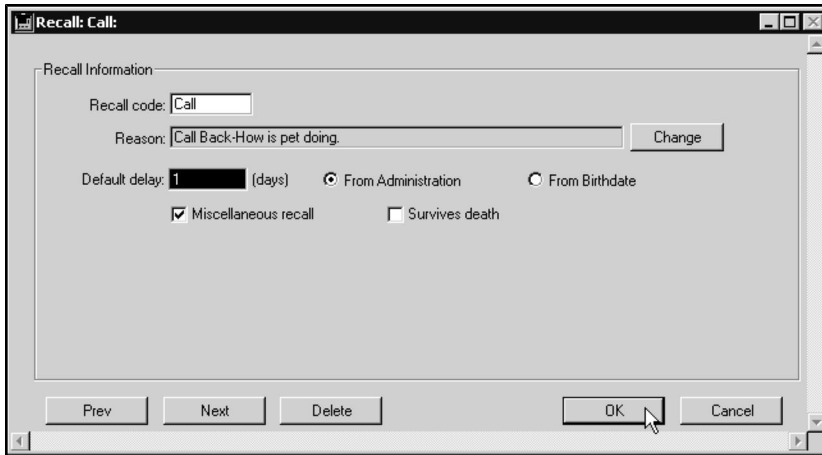
- The **Find** window opens.
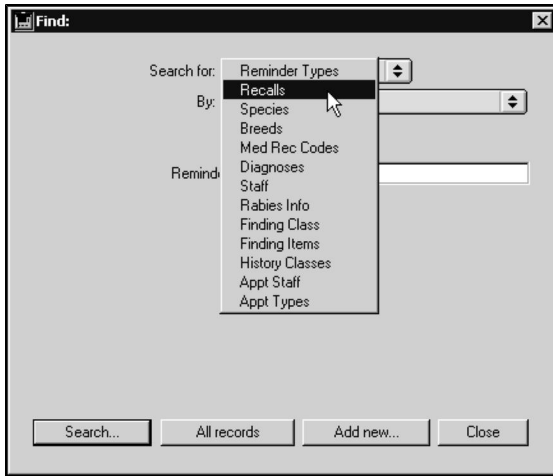
- Choose **Recalls** from the **Search For** drop-down list.

- Click the **Add New** button at the bottom of the **Find** window.
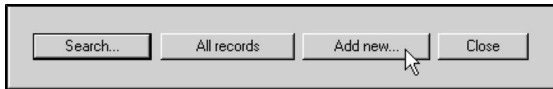
- The **New Recall Type** window opens.
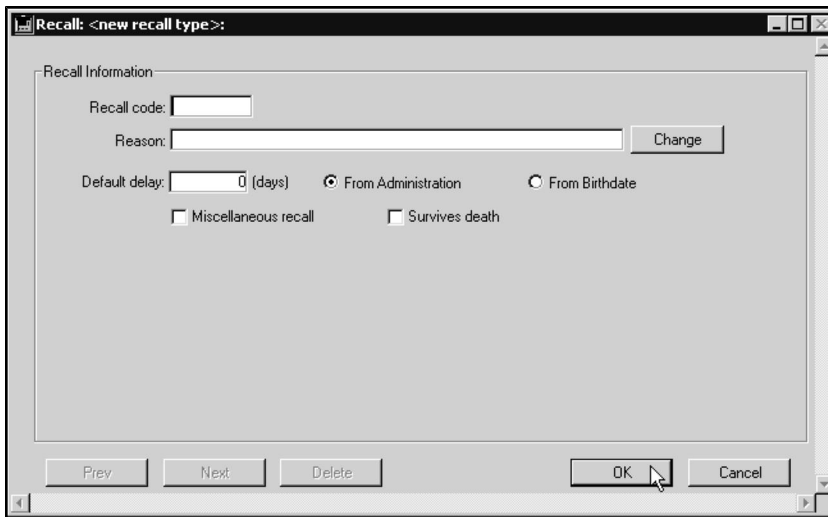
- Type a unique code for this Recall into the **Recall Code** field. The **Recall Code** can be up to 8 characters long.

- Type a description of the reason for this recall into the **Reason** field. The reason is listed on the Patient record and printed on reports of Recalls that are due.

- Type the number of days from the time this recall is entered on a patient record until it becomes due into the **Default Delay** recall. DVMAX uses this number

as a default, but you can override it when you enter the Recall on the patient's record.

- Select **From Administration** to have the Recall date be based on when the recall is entered onto the patient record. The recall will be due "x" number of days from when the recall was entered on the patient record, where "x" is the **Default Delay** value.

-OR-

- Select **From Birthdate** to base the recall due date on the birthdate of the patient, independent of the date the Recall request is added to the patient record. This is useful for recalls such as early puppy or kitten vaccines that come due based on the age of the animal.

- Select **Miscellaneous** if you wish to allow the reason for the recall to be modified when the Recall is entered on the Patient record. Deselect the **Miscellaneous** checkbox if you wish the Reason to be entered on the patient record as-is.

- Select **Survives Death** if you will want to enter this Recall on a patient record even if the patient is marked as deceased. Deselect **Survives Death** if you do not wish this Recall to be entered on the record of a deceased patient.

ⓘ The **Survives Death** option is useful in cases such as a Sympathy Recall for a deceased patient.

- Click **OK** to save the Recall record.

Delete a Recall Record

⚠ Deleting a Recall record is not recommended. It may leave other records incomplete, especially if the Recall record is linked to a Bill Item or has been added to a Patient record.

To delete a single Recall record:

- Find and open the Recall record you wish to delete. See **Searching for Recall Records.**

- From the Recall record, click **Delete**.

- DVMAX will ask you to confirm that you want to delete the Recall record. Click **OK** to delete.

To delete multiple Recall records:

- From the Recall records list (see **Listing All Recall Records**), click to select the Recall records you wish to delete.

 Press and hold the SHIFT key to select multiple adjacent Recall records from the list. Press and hold the CONTROL key to select multiple non-adjacent Recall records.

- Choose **Delete Records** from the **Recalls** menu.

- DVMAX will ask you to confirm that you want to delete the Recall records. Click **Delete** to proceed.
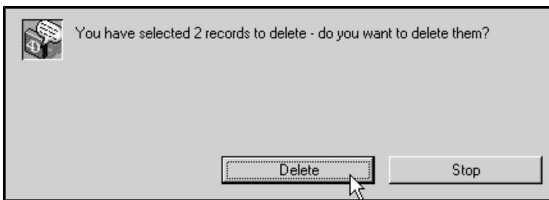
Referral Source Records

Referral Source records help you keep track of how clients and patients are referred to your practice. Each Referral Source record stores identifying information about a particular source of referrals. Referral Source records also provide a list of referrals from each source, and make available a word-processing environment to write to the source as needed.

Referral Source records are useful to specialty or emergency practices that need to keep track of colleagues who refer patients to them. General Practices can use these records to track the source of new clients. You can also use Referral Source Records to store information about current clients who refer new clients.

ⓘ The **Referred By** fields in Client and Patient records can contain only Referral Source Records. See *Working with Client Records* and *Working with Patient Records* for more information.

Search For Referral Source Records

To find a Referral Source record:

- Click **Clients** on the Command Palette

-OR-

- Choose **Clients & Patients** from the **Section** drop-down menu.
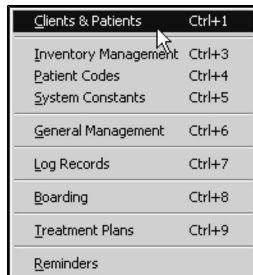
- From the **Find** window, choose **Referral Source** from the **Search For** drop-down list.
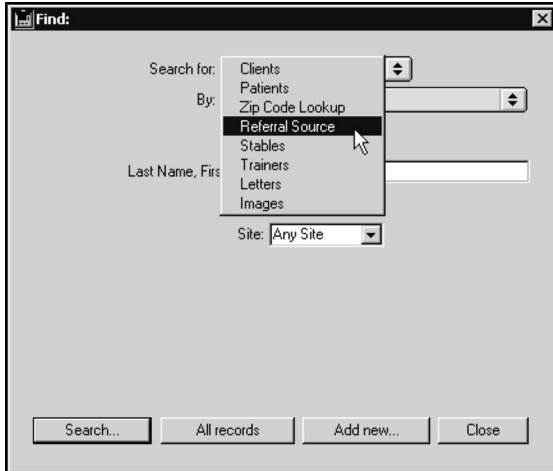
- Choose a criterion from the **By** drop-down list. See *Search Criteria* for more information.
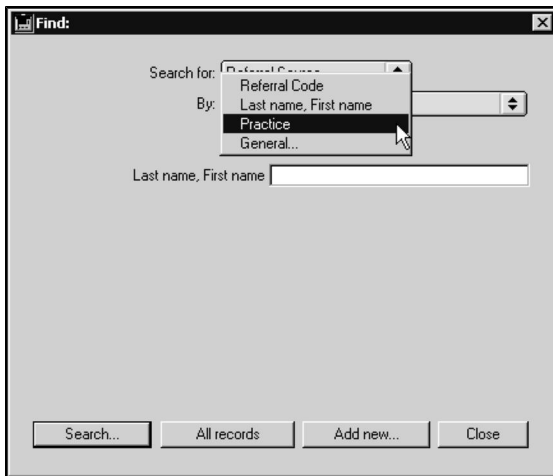
- Type your search term into the field below the **By** drop-down list. The label of this field is determined by your choice from the **By** drop-down list.

- Click **Search**.

- If there is more than one match for your search, the Client List window will display a list of items that matched your search.
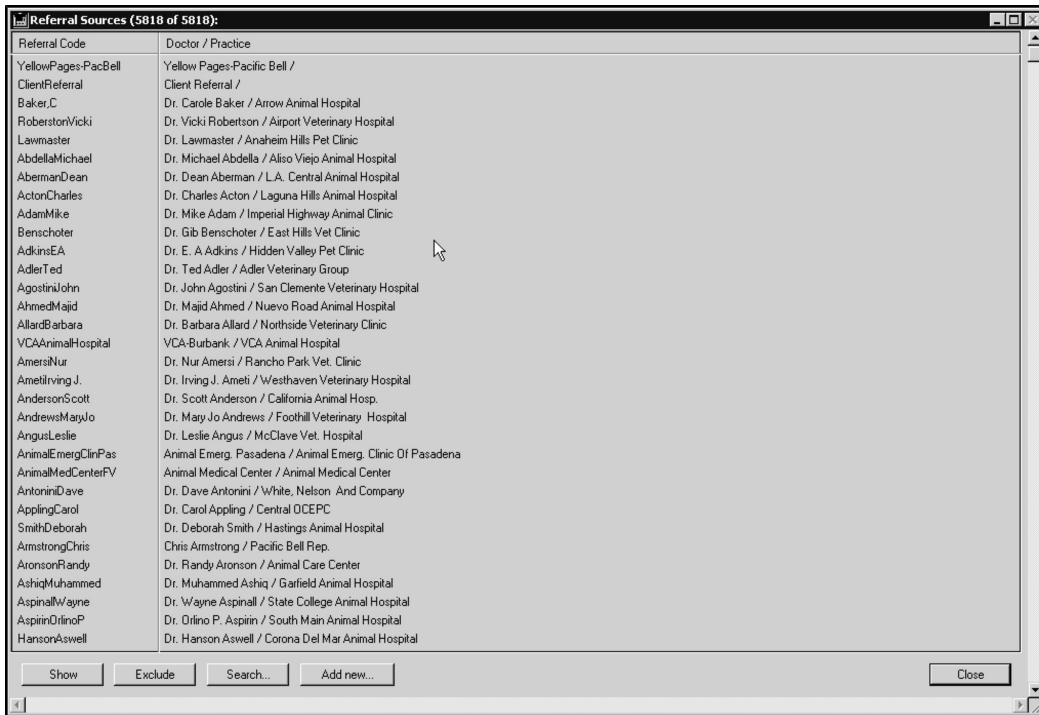
- The first column of the **Referral Source List** displays the Referral Code for the record. The second column displays the Doctor's Name, and the Practice Name, where applicable.

- If there is only one Client Record that matches your criteria, DVMAX will open that Referral Source Record.

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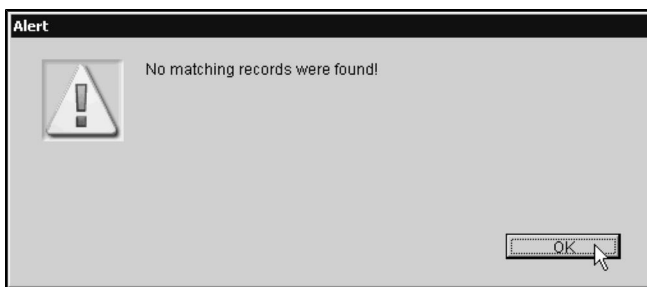
Listing All Referral Source Records

To list all Referral Source records:

- Click **Clients** on the Command Palette.
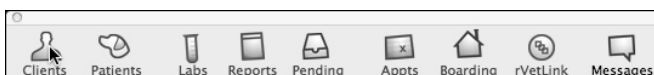
    -OR-

- Choose **Clients & Patients** from the **Section** drop-down menu.
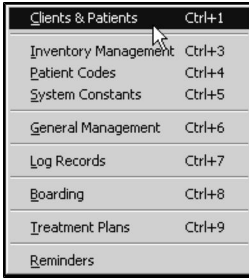
- From the **Find** window, choose **Referral Source** from the **Search For** drop-down list.
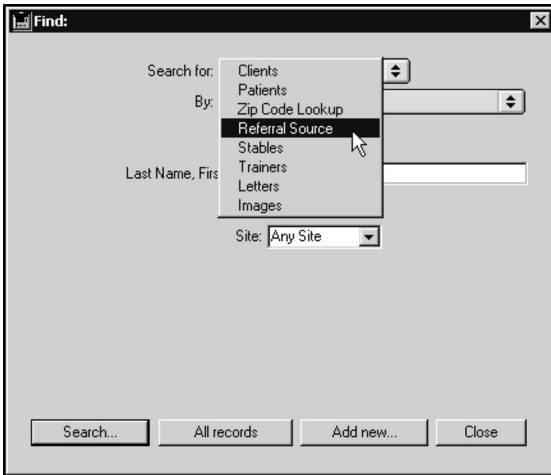
- Click **All Records** at the bottom of the **Find** window**.**

Create a New Referral Source Record

To create a Referral Source record:

- From the **Section** menu, choose **Clients & Patients**.
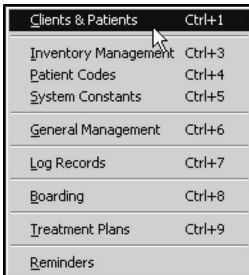
-OR-

- Click the **Clients** icon on the Command Palette.
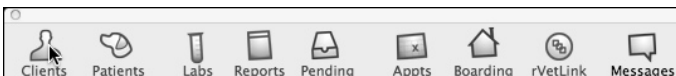
- From the **Find** window, choose **Referral Source** from the **Search For** drop-down list.
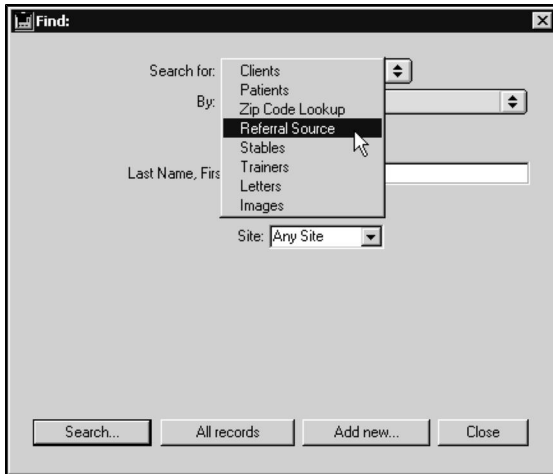
- Click **Add New** at the bottom of the **Find Window**. A new **Referral Source Record** window opens.

ℹ You can also find an **Add New** button at the bottom of the list of sources resulting from a Referral Source search. For more information about Referral Source searches, see *Searching For Referral Sources*.
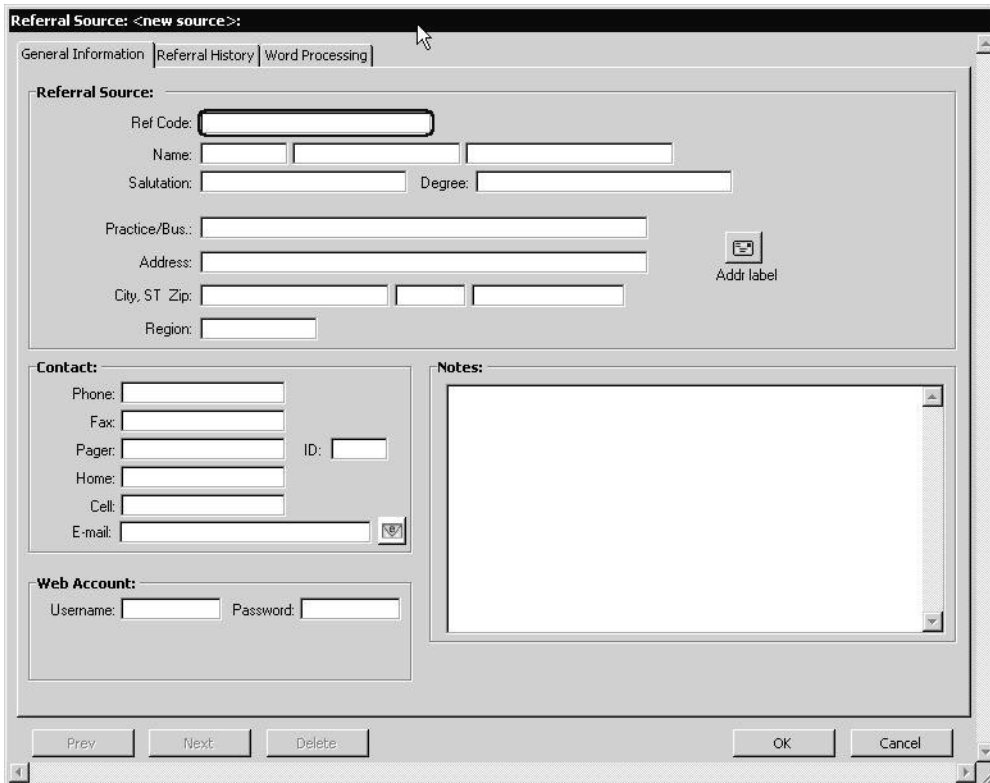
- Complete each field as appropriate in the **Referral Source** window. See *Referral Source Fields* for information on each field.

ℹ You can leave any field empty, except for the **Ref Code** and **Last Name** fields.

- Type a unique code in the **Ref Code** box. This code will be used to enter this Referral source on Client and Patient records. Press the TAB key.

ℹ️ Create a Referral Code that closely matches the source's name. For example, the code for John Smith could be "JohnSmith" (simply remove the spaces), or the code for ABC Animal Hospital could be "ABCAnimalH".

- Type a title (i.e. Mr., Mrs., Dr, etc.) in the first **name** field. Press the TAB key.

- Type the source's first name in the second **name** field. Press the TAB key.

- Type the source's last name in the third **name** field. Press the TAB key.

- Type the name with which you start a letter to this source into the **Salutation** field. Examples are "Dr. Roberts" or "John" or "Ms. Smith". Press the TAB key.

- Type the degree held by this source, if any, into the **Degree** . Examples are "DVM." or "M. Sc." Press the TAB key.

- Type the name of the source's Practice or Business into the **Practice/Bus** field. Press the TAB key.

- Type the source's **Address**, **City**, **State** and **Zip** or **PostalCode** into the appropriate field. Use the TAB key to move from field to field.

ℹ️ You can type the client's zip code into the City field and DVMAX will automatically fill in the City, State and Zip Code fields and move you to the Home Phone number field. For more information, see *Zip Code Lookups* in the *Working With Client Records* section of this reference.

- If you classify sources by Sales Region, type this source's Region into the **Region** field. Press TAB.

- Type the source's E-mail address into the **E-Mail** field. Press TAB.

- Type the source's **Work Phone**, **Fax**, **Pager**, **Home** and **Cell Phone** numbers into the appropriate field. Use the TAB key to move from field to field.

ℹ️ DVMAX automatically formats any telephone number into "xxx-xxxx" or "xxx-xxx-xxxx" format. There is no need to type dashes or parentheses. The system will warn you if a telephone number is not a 7 or 10 digit number. DVMAX will also convert letters to their number equivalents.

- Enter the referral source e-mail address in the **E-Mail** field.

- If you wish this source to have access to Patient records via the Internet, type a username and password into the **Username** and **Password** field. See *Web Patient Reporting* for more information.

⚠️ Usernames and passwords must be 6-12 characters long and may contain letters and/or numbers.

- Type any notes about this source into the **Notes** field.

- Click **OK** to save the new Referral Source Record.

E-Mail a Referral Source

To e-mail a referral source, click the e-mail icon beside the **E-Mail** field. The referral source e-mail address is in the **To** field. Compose your e-mail and click **Send**.
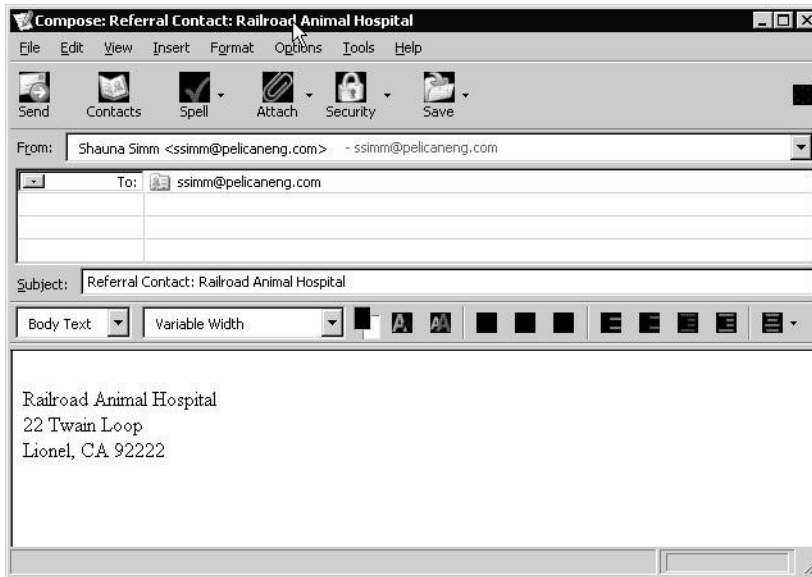
Delete a Referral Source Record

⚠ Deleting a Referral Source record can affect client and patient records that use this record. Use this feature with caution.

Delete a Single Referral Source Record

To delete a single Referral Source record:

- Open the Record you wish to delete. See *Searching For Referral SourceRecords* for more information.

- Click **Delete** from the Referral List window.

- DVMAX will ask you to confirm that you wish to delete this record. Click **OK.**
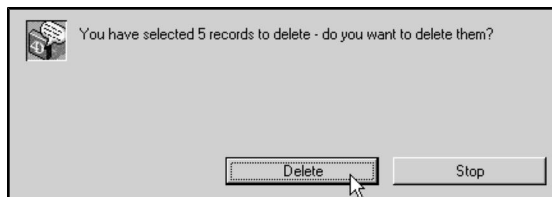
Deleting Multiple Referral Source Records

To delete multiple Referral Source Records at once:

- Find the Referral Source Records you wish to delete from the list of Referral Source Records. . See *Search for Referral SourceRecords* for more information.

- Click to select the record(s) you wish to delete. To select multiple records, hold the SHIFT key while clicking to select adjacent records in the list. Hold the CONTROL key (COMMAND on Macintosh) to select non-adjacent records.

- Choose **Delete Records** from the **Referral Source** menu.
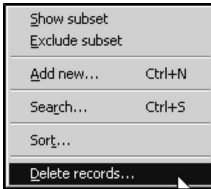
- DVMAX will ask you to confirm that you wish to delete the record(s). Click **OK** to delete the record(s)**.**

Referral History Tab

The **Referral History** tab provides a list of the most recently referred patients from this referral source, making it easy to review recent cases referred to you.
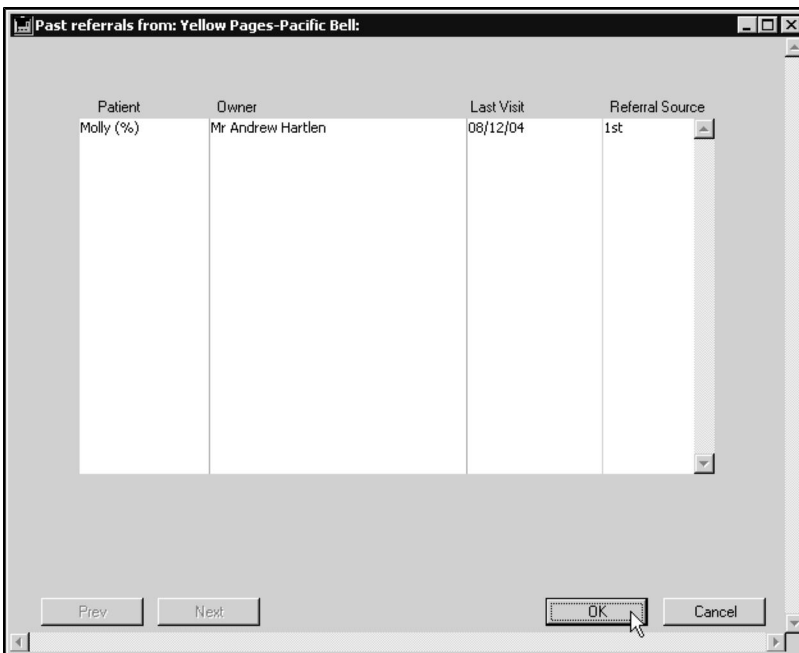
Viewing a Referred Patient Record

To view the record of an individual referred Patient:

- Follow the steps in *Sorting the List of Past Referrals* to produce a list of patients.
- Double-click the Patient record you wish to view from the list.

-OR-

- Click to select the Patient Record you wish to view from the list.
- Click the **Show** button at the bottom of the Patient list.

STS	File #	Name		Sex	Species - Breed	Owner name	Telephone
AC		Kaylee (%)	%	Fem	Canine-ShiTzu	Mr Andrew Hartlen	800-877-9221
AC		Molly (%)	%	Fem	Canine-Pug	Mr Andrew Hartlen	800-877-9221

Show   Exclude   Search...   Close

- Click the **Show** button at the bottom of the Patient list

ℹ If there is only one patient in the List of Past Referrals, the steps in *Sorting the List of Past Referrals* will open that patient's record.

Word Processing in Referral Source Records

The Word Processing function allows you to write to your Referral Sources, making it easy to correspond with any referring colleague or client. For specialty and emergency practices, this feature can make it easy to send out an occasional newsletter about your practice to your referring clinicians. General practices can use it for sending "Thank You" letters to the referral source. You can also create emails or Fax documents (see the *Faxing* chapter in this Manual. Faxing requires a license from DVMAX).
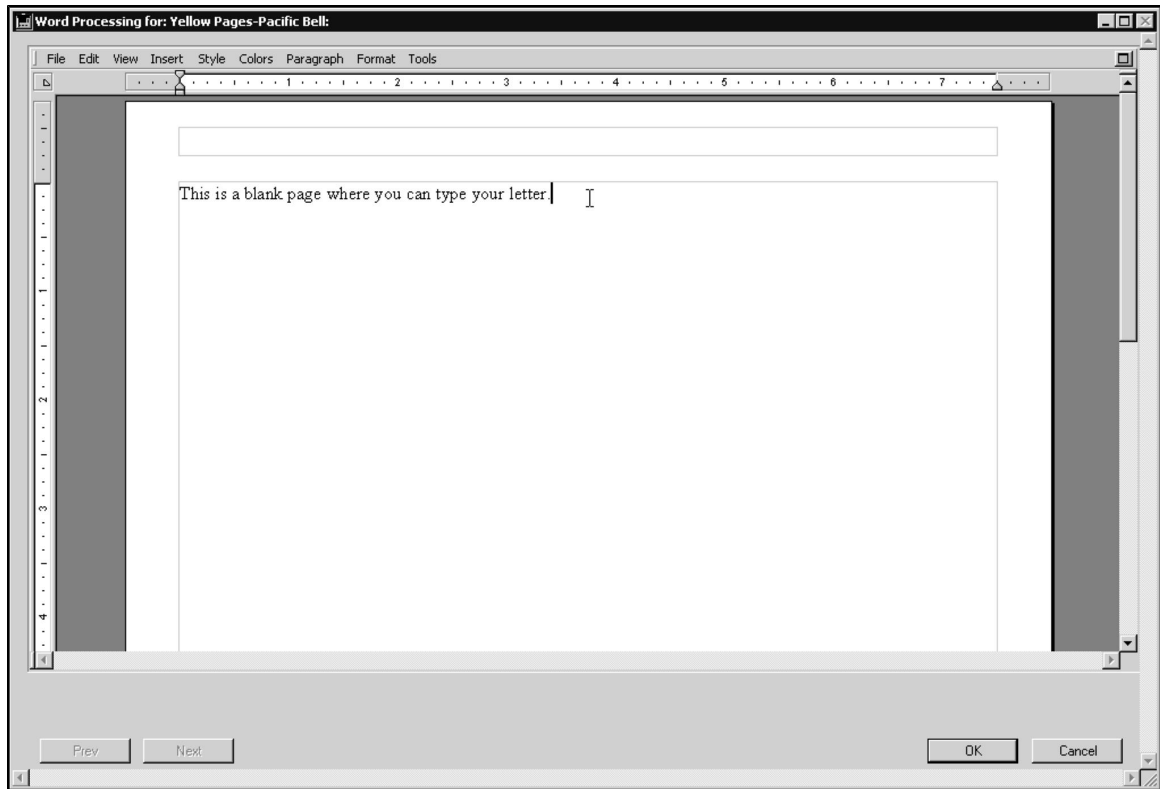
Select the **Word Processing** tab from Referral Sources to open the Word Processing facility.

For more information on word processing in DVMAX, see *Word Processing* elsewhere in this documentation.

The Referral Source Word Processing Palette

The Referral Source Word Processing tab is designed for writing to Referral Sources directly. It cannot be used to write about a specific case or client - that can be done from the specific Patient or Client record word processing entry screen.

Use the **Word Processing Palette**, accessed from an open WP document by clicking **Show Palette**, lets you easily insert information from the current Referral Source record into your letters.

For more information on word processing in DVMAX, refer to the *Word Processing* chapter.

Closing the Referral Source Word Processing Palette

To close the Patient Word Processing Palette at any time while working on a Patient Word Processing screen:

- Click the **Close Box** in the upper right corner of the Palette, or select **Hide Palette**.
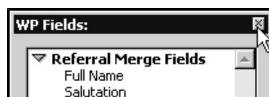
Using the Referral Source Word Processing Palette

To use the Referral Source Word Processing Palette, simply click an information field on the palette, then click **Insert** at the bottom of the palette. DVMAX will place the selected information into the word processing document at the current cursor position. Double-clicking a field name in the Palette is a shortcut for inserting that field.

ℹ️ Holding down the Shift key on your keyboard while inserting an item from the Word Processing Palette will capitalize the text you are inserting.

The Referral Source Word Processing Palette is broken down into 2 main "groups" of references: **Referral Merge Fields** and **Referral Address Lines**.

Referral Merge Fields
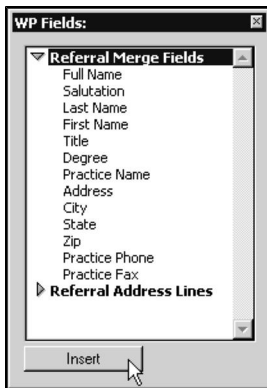
Referral Merge Fields items allow you to insert fields from the current Referral Source record into the word processing document. Items inserted onto a letter are actually references to the current Referral Source record. See *Creating a New Referral Source Record* for information on the fields referenced by this menu.

Referral Address Lines
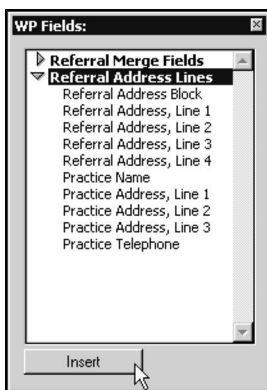
Referral Address Lines items allow you to insert the address of the Referral Source into your document. Address lines are actually references to the address fields of the current Referral

Source record. The address can be inserted as a block of text, or as individual lines (permitting other text to appear alongside each line of the address).

See *Creating a New Referral Source Record* for information on the fields referenced by this menu.

Clients as Referral Sources

Any active client can act as a referral source in DVMAX. To enable clients to act as referral sources, you need to select **Allow Referrals By Other Clients** from the **Clients and Patients** tab under **System Constants**.

DVMAX represents client referral sources with a special Referral Source record. This record has the code **ClientReferral**. This record has no address or contact information, and is blank except for the code and the last name, which is also **ClientReferral**.

When the **ClientReferral** source is referenced in Client or Patient record, DVMAX presents a list of active clients to choose from. For more information on Client Referrals, see *Working with the Client Record* and *Working with the Patient Record*.

Reminders

A reminder is a notice that is sent to a client indicating that a patient is due for a specified procedure or set of procedures. DVMAX's Reminders function lets you identify all patients needing reminders for procedures due within a specified date range, and allows you to create and send reminder notices via email or standard mail.

Reminders can be linked to Bill items. Entering a Bill item on an invoice can automatically post a new reminder, update an existing reminder, or remove an outdated reminder from the patient's record. This makes it easy to assure that specific treatments are always followed up with an appropriate reminder. See **Bill Items** and **Invoicing** for more information.

Working With Reminder Types

Reminder Types define the different types of reminders that DVMAX tracks. Reminder Type records identify the reminders that are included in a patient's record. Reminder Types may also be linked to Bill Items so that the sale of a bill item through an invoice will automatically update a reminder on a patient's record. See **Bill Items** for more information.

DVMAX contains a number of pre-defined, common Reminder Types. Additional reminder type records can be added.

View Reminder Records

To view a list of all Reminder records:

- Choose **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	

CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.

- The **Find** window opens.
- Choose **Reminder Types** from the **Search For** drop-down list.

- Click **All Records** at the bottom of the **Find** dialog to see a list of all defined Reminder records.

- Each Reminder record is listed on an individual line with columns for **Reminder Code**, **Description**, **Duration Days**, **Fixed Date** and **Turnover (Days)**.

Search for Reminder Records

To find a Reminder record:

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

CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.

- The **Find** window opens.

- Choose **Reminder Types** from the **Search For** drop-down list.

- Choose **Reminder Code** from the **By** drop-down list to search Reminder records by code. Type a Reminder Code in the **Reminder Code** field into the field below the **By** drop-down list. If you are searching by code, you must type at least the first few letters of the Reminder code

-OR-

- Choose **Keyword in Description** to find Reminder records by a keyword in the recall description (called the **Description** field in the Reminder record). Type a keyword or words from the Description into the **Keyword in Description** field below the **By** drop-down list. DVMAX will find all Reminder records that contain the word or words you type in the field.

- Click **Search**.

- If there is more than one match for your search, the Reminder Types List window will provide a list of items that matched your search.
- If there is only one Reminder record that matches your criteria, DVMAX will open that Reminder record.
- If there are no matches, DVMAX will display a message to that effect and return you to the **Find** window to search again.

Create a New Reminder Type Record

To create a new Reminder record:

- Choose **Patient Codes** from the **Section** drop-down menu.
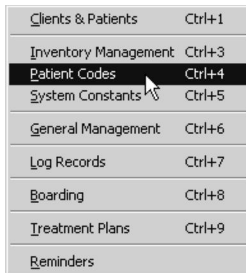
CONTROL+4 (COMMAND+4 on Macintosh) is a keyboard shortcut for **Patient Codes**.

- The **Find** window opens.
- Choose **Reminder Types** from the **Search For** drop-down list.
- Click the **Add New** button at the bottom of the **Find** window.
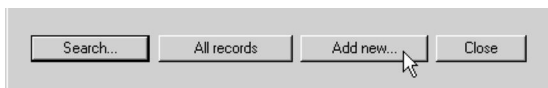
- The **New Reminder Type** window opens.
- Type a unique code for this Reminder into the **Reminder Code** field. The **Reminder Code** can be up to 8 characters long.
- Type a description of the reason for this reminder into the **Description** field.
- Type a reminder note in the **Note** field. The reminder note will appear on reminder cards that are printed or emails, as well as on certificates.

- Type a summary or shorter version of your note into the **Short Note** field. The short note is printed in place of the note when a reminder is printed with multiple patients on a single card.

- Select the **Don't List on Certificates** if you do not want Reminders of this type printed on vaccination certificates. You may feel this option is appropriate, for example, for Reminders for geriatric exams or stool samples.

- Type a number into the **Duration (Days)** field. This tells DVMAX how many days to wait before sending the Reminder again.

Typical annual reminders are set to 365 days. Some puppy and kitten vaccines may be set for 21 or 30 days. The duration that is set here is the default duration for this reminder type throughout the system; you can change the duration for a reminder on any patient record and for any Bill item link.

- Select **From Administration** to have the Reminder date be based on when the procedure linked to this reminder was administered. The reminder will be due "x" number of days from when the linked procedure was added to patient history, where "x" is the **Duration (Days)** value.

-OR-

- Select **From Birthdate** to base the reminder due date on the birthdate of the patient. This is useful for reminders related to procedures that come due based on the age of the animal.

- If you want this reminder to always be due on the same date every year, type this date in the **Fixed Date** field. Type the current year for the year portion of the date. The default format for all dates in DVMAX is MM/DD/YY.

- Type a number in the **Turnover (Days)** field. This number controls the behavior of fixed date reminders in DVMAX. If a reminder is entered or updated within the "turnover period" of the fixed date then it will be set to be due again on the fixed date one year in the future. If it is before the turnover period, then it will be set to be due on the upcoming fixed date.

Turnover (Days) Example: If a reminder for a heartworm test is set for April 1 and the turnover period is set for 31 days, then the following results are possible:

Test done before March 1: Due again on April 1 of the same year.

Test done between March 1 and April 1: Due again on April 1 of next year

Test done after April 1: Due again on April 1 of next year

- Click **OK** to save the Reminder Type record.

Modifying a Reminder Type

To modify a Reminder Type:

- Find the Reminder Type you wish to modify.

- Make the necessary changes on the Reminder Type record dialog.

- Click **OK** to save the changes to the Reminder Type record.

Delete a Reminder Type Record

⚠️ Deleting a Reminder record is not recommended. It may leave other records incomplete, especially if the Reminder record is linked to a Bill Item or has been added to a Patient record.

To delete a single Reminder Type record:

- Find and open the Reminder Type record you wish to delete. See **Search for Reminder Type Records.**

- From the Reminder record, click **Delete**.

- DVMAX will ask you to confirm that you want to delete the Reminder Type record. Click **OK** to delete.
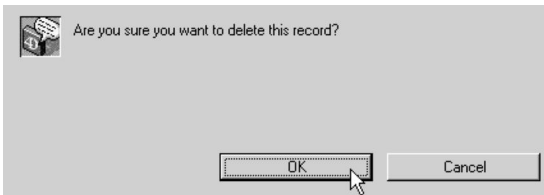
To delete multiple Reminder Type records:

- From the Reminder records list (see **List All Reminder Records**), click to select the Reminder Type records you wish to delete.

ℹ️ Press and hold the SHIFT key to select multiple adjacent Reminder records from the list. Press and hold the CONTROL key to select multiple non-adjacent Reminder records.

- Choose **Delete Records** from the **Reminder Type** menu.

- DVMAX will ask you to confirm that you want to delete the Recall records. Click **Delete** to proceed.

Reminders and the Patient Record

Reminders can be added manually to a patient record or automatically through invoicing. Refer to those chapters in the user guide for more information on adding reminders to a patient record.

Reminders: A Quick Overview

Use the **Reminder Wizard** to create a list of patients requiring a reminder notice. Briefly, the steps involved are as follows:

- From the **Section** drop-down menu, choose **Reminders**. This opens the **Reminder Wizard** dialog.

- From the **Reminders** window, select a **Date Range**, or use the default range as listed.
- Choose the procedures for which you would like to create reminders from the **Types** area of the **Reminders** window.
- Click OK to produce a list of all patients requiring reminders.
- From the **Reminder List** window, click **OK** to generate the reminder notices. The kind of reminder notice created (email or standard mail) will be determined by the selection you have made in the client record.
- Click **Cancel** to abort the Reminder process.

Where the **Email Reminder** field is checked on the **Client** record, an email reminder will be sent. For those clients where the **Email Reminder** option is not selected, a regular mail notice will be prepared.

Choosing a Date Range

When generating a Reminders list, DVMAX will search the database for all patients due for selected procedures within the specified **Date Range**. The default date range is determined by the **Reminder Setup** (see **Reminder Setup**).

To select a Date Range:

- Use the default **Date Range** as provided. The default Range can be adjusted by clicking **Setup** from the Reminders window (see **Reminder Setup**).

- Choose your own Date Range by clicking the **Calendar** icons and selecting a **Start Date** and **End Date** from the **Calendar**.

Choosing Reminder Types

The **Types** area in the Reminder window lists all procedures for which reminders have been set up. Choose the procedures from the list for which you would like to generate reminders.
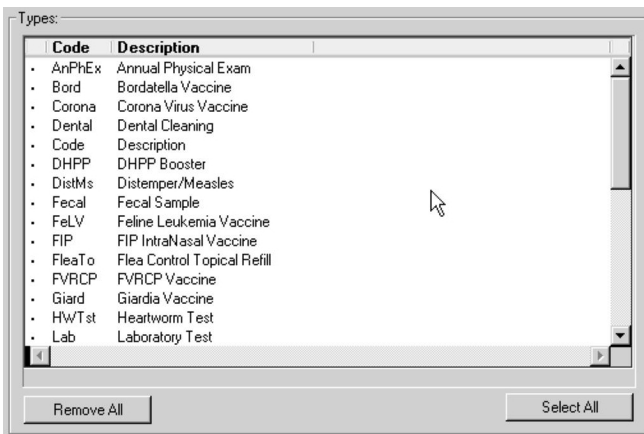
By default, all procedures are selected. If you do not specify at least one Type, DVMAX cannot run a search or generate a Reminder List.

To select Reminder Types:

- Click **Select All** to include all Types.
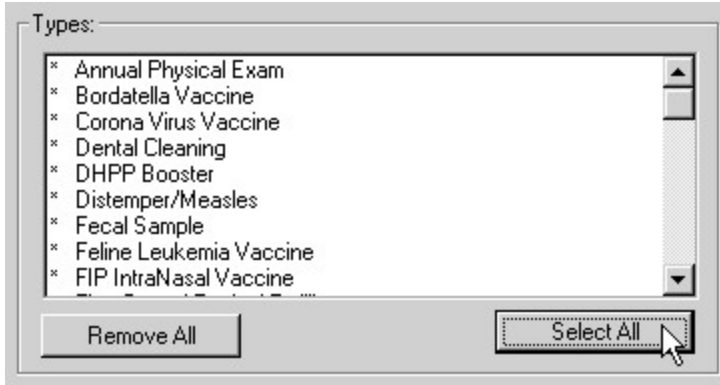
- Click any item to select it, click again to deselect the item. An item is selected when an asterisk (*) appears beside the reminder type.
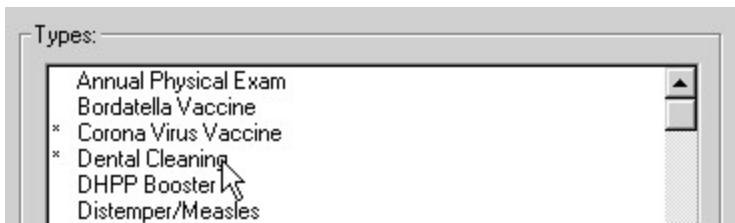
- Click **Remove All** to deselect all Types.
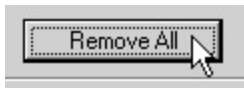
ℹ️ Reminder Types are defined under the **Reminder Types** menu from **Patient Codes** in the **Section** drop-down menu.

Generating List of Patients Due for Reminders

The DVMAX Reminder Wizard uses the Date Range and Reminder Types to generate a list of all patients due for selected procedures within the specified time period. This is called the Reminder List.

To generate a Reminder List:

- Click **OK** from the **Reminders** window. Make sure you have set the **Date Range** and have selected **Types** first.
- A list of all patients matching the search parameters will be returned.
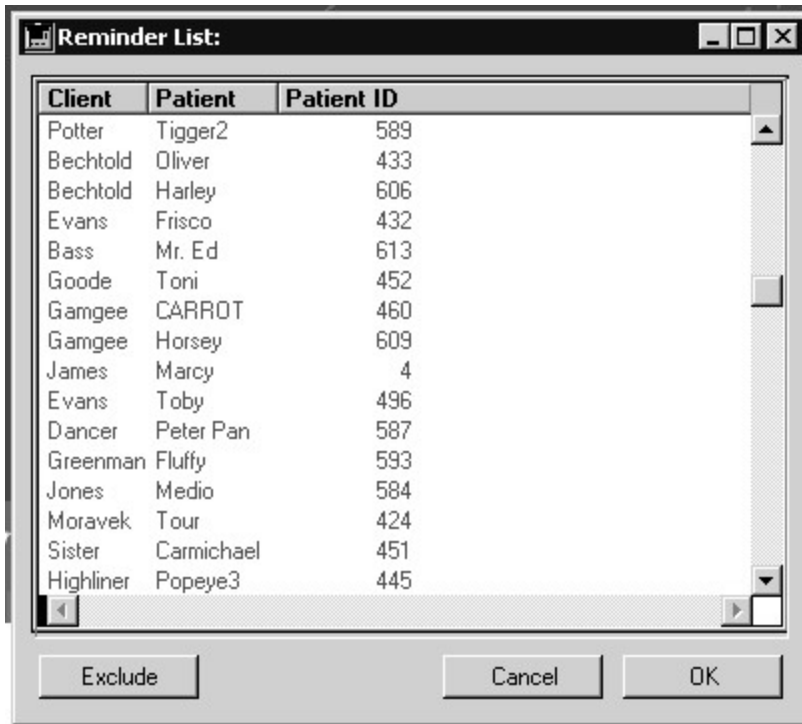
No Reminders to Process

If there are no reminders due within the specified parameters, a message window opens indicating there are no reminders to process. Click **OK** to close the message window.
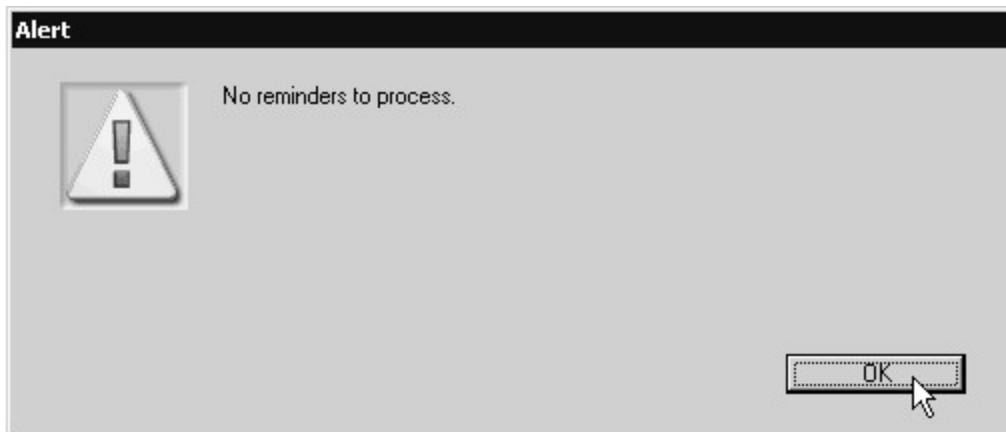
About the Reminder List

The list of patients generated by the Reminder Wizard is color-coded to indicate that the patient is due to receive either a first, second or third reminder. For each patient, all procedures due within the specified date range will appear on the same reminder notice. Depending on how you have set up the Reminder function (see **Reminder Setup**), patients can be sent up to 3 reminder notices.

- Green indicates first reminder.

- Blue indicates second reminder.

- Red indicates third reminder.

ⓘ The amount of time between reminder notices is determined by the **Days Between Reminders** setting under **Email Reminders** from **System Constants**. The days between reminders applies to both emailed and printed reminders.

Creating Reminder Notices with the Reminder Wizard

⚠ Before you begin processing reminders, be sure to have your printer set up and ready with the postcards or other paper you intend to use for any printed reminders.

Reminder notices can be generated using the Reminder Wizard. The Reminder Wizard, accessed from **Reminders** under the **Section** menu, lets you set up the reminder card/letter/email format and generate a list of all patients due for first, second or third reminders.

To generate reminder notices using the **Reminder Wizard**:

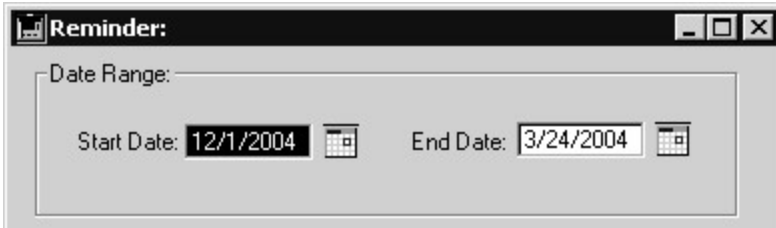- From the **Section** drop-down menu, choose **Reminders**.

- From the **Reminders** window, select a **Date Range**, or use the default range as listed.

- Choose the procedures for which you would like to create reminders from the **Types** area of the **Reminders** window.

- Click **OK** to produce a list of all patients requiring reminders.

- Click **OK** from the **Reminders List** to begin processing the reminders.

- A Confirm window opens indicating the number of reminders that are about to be processed. Click **OK** to continue processing reminders.

-OR-

- Click **Cancel** to abort the reminders process.
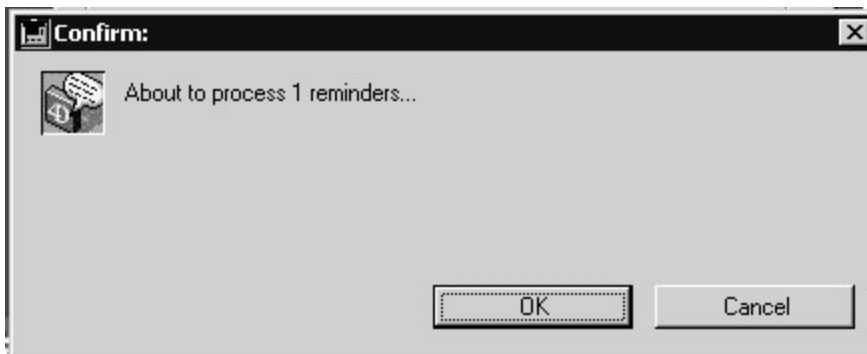
ⓘ The type of reminder generated will depend on the selection made in the client record. Where the Email Reminder field is checked on the Client record, an email reminder will be sent.

For those clients where the Email Reminder option is not selected, a regular mail notice will be prepared. The format of the reminder message is configured under **Reminder Setup**.

Excluding Patients from the Reminder List

You can choose not to generate a reminder for any patient on the Reminders list.

To exclude a patient:

- Click to highlight a patient from the list.

-OR-

- Click and drag to highlight a group of patients from the list.

- Click **Exclude**. The selected patients will be removed from the list.
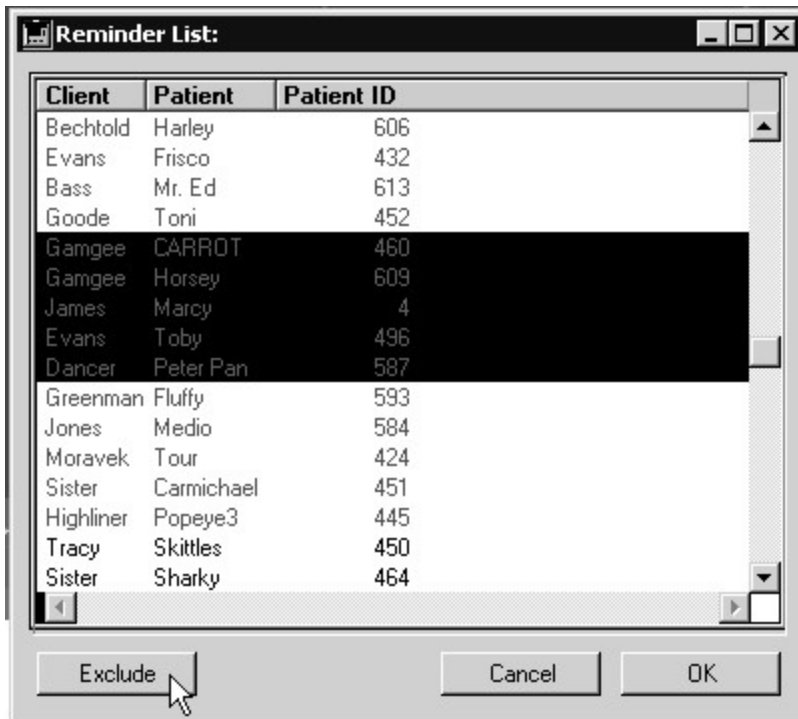
Reminder Notice Setup

The format of the reminder notice as well as the default Date Range is determined by the **Reminder Setup** section of the **Reminder Wizard**.

To configure the Reminder function:

- From the **Section** drop-down menu, choose **Reminders**.
- From the **Reminders** window, choose **Setup**.

- From the Send Reminders area, choose how often you wish to generate reminder notices (Monthly, Semi-monthly or Weekly). The default value is semi-monthly. This will determine the default Date Range used in generating the Reminder List. (Date Range, including Start Date and End Date fields, appears on the main Reminder window.)

⚠️ The **Monthly** default **Start Date** will be the first day of the month following the current month (current date is the first of the month). **Semi-monthly** will default to the first or middle of the month, depending on the current date. For example, if the current date is May 5, the default date for **Semi-monthly** will start at May 15. For **Weekly**, the default **Start Date** will be the Monday of the week following the current date.

- From the **Reminders to Send** menu, select the number of reminder notices to send to each client and associated patient. You can send a single reminder, or choose to send second and third reminders.

- From the **Format** drop-down menu, select Built-In (default), 4D Write or Semi-Custom. Follow the same process for **Mail** and **E-mail** reminders. You must have a valid e-mail address in the client's record in order to send an electronic reminder.

- If you choose a format other than Built-In, click **Set** to select the format for reminders.

- Repeat the format setup for First, Second and Third reminders as applicable. You will only see Second and Third reminder options if you have chosen 2 or 3 from the **Reminders to Send** menu.

- If you are sending mail reminders, you can choose to include more than one reminder card per printed page. Click **Multiple Cards on a Page** to include more than one reminder on a page.

ⓘ Only one reminder per patient will be sent out at any one time. All procedures for which a patient is due within the selected Date Range will appear on the same reminder notice. If the patient comes in they will be marked as complying with the reminder and will be sent no further reminders for the procedures listed on the last reminder sent. If the patient does not present, the patient may appear on the Reminder List the next time Reminders is run. In order for a patient to receive a second or third reminder, the specified time between reminders (as set up under **Email Reminders** in **System Constants**) must have lapsed, and you must have indicated under Reminder Setup that you wish to generate second and third reminders.

Reminder Sequencing

When generating a Reminders list, DVMAX will search the database for all patients due for selected procedures within the specified **Date Range**. In addition, the Reminder wizard allows

the user to select the **number** of reminders sent and the **frequency**. While this provides a great deal of customization to the user, it also increases the complexity of the reminder function.

The variables that must be considered when creating reminders include:

- The number of Reminders to be sent (up to three).
- The interval between each reminder.
- Days between Reminders (in **System Constants**).
- Send Monthly, Semi- Monthly, Weekly.
- If the procedure for which the reminder was provided was completed or not completed.
- Dates of previous reminders.
- Has the previous reminder interval elapsed?

Example: The default settings are set to send **three reminders** at **monthly intervals.**

First Reminder: On May 1st, the Reminder wizard is used to perform a search for dates between May 1 and May 31. DVMAX searches for all selected procedures in this **date range** and which **have not** received a reminder. The clients with animals meeting these specifications are sent a reminder.

Second Reminder: After the first reminders are sent, DVMAX searches for procedures that were scheduled for the dates between April 1st and April 30th (30 days before or the previous month interval). The wizard also searches if the procedures have been issued a first reminder and if procedure was performed. If the procedure is **overdue**, has **received a first reminder** and falls within the range to the **previous interval**, a second reminder is sent to the client.

Third Reminder: The third reminder works the same as the second reminder but searches for the dates between March 1st and March 31 (60 days) and if a second reminder has been sent.

If you come back on May 15 and perform a new search (reminders to be sent) for the dates between May 15 and May 30, the list would be empty. This is because:

- The previous search located all procedures within this date range.
- The procedures in this date range have been sent a first reminder.
- DVMAX will only send out a second reminder to those procedures who have received a first reminder.
- DVMAX will not send out a follow-up reminder until the previous reminder interval has elapsed or the procedure becomes overdue (reminder group date is less than or equal to the previous reminder date, defined as the current date less the reminder delay).

DVMAX helps distinguish between reminder list procedures with color-coding. See, **About the Reminder List** for more details

Reminder Format

The Reminder Wizard allows you to select one of three formats for your reminders: Built-In, 4D Write or Semi-Custom.

- Built-In: This is the standard reminder format that comes with DVMAX. First, second and third reminders will look the same. This is the default format.

- 4D Write: Allows you to select a 4D Write document that has been previously created using 4D's Word Processing feature. First, second and third reminders can be different. Select a document style from the 4D WP Document list and click Select.
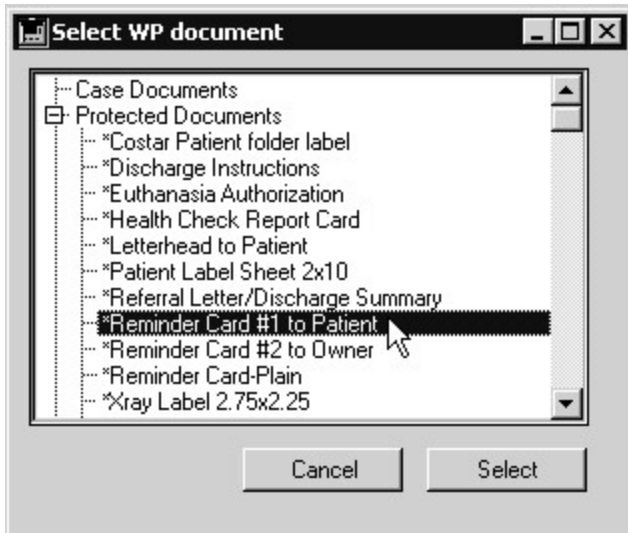
- Semi-Custom: Semi-Custom allows for some modification of the built-in reminder format that comes with DVMAX. First, second and third reminders can be different. Click **OK** from the Custom Reminder Setup window to save changes to the reminder notice format.

Email Reminder Setup

You must provide DVMAX with information about your internet connection and email account in order to use Email Reminders.

To configure Email Reminders:

- Choose **System Constants** from the **Section** menu.
- Click the **Email Reminders** tab.
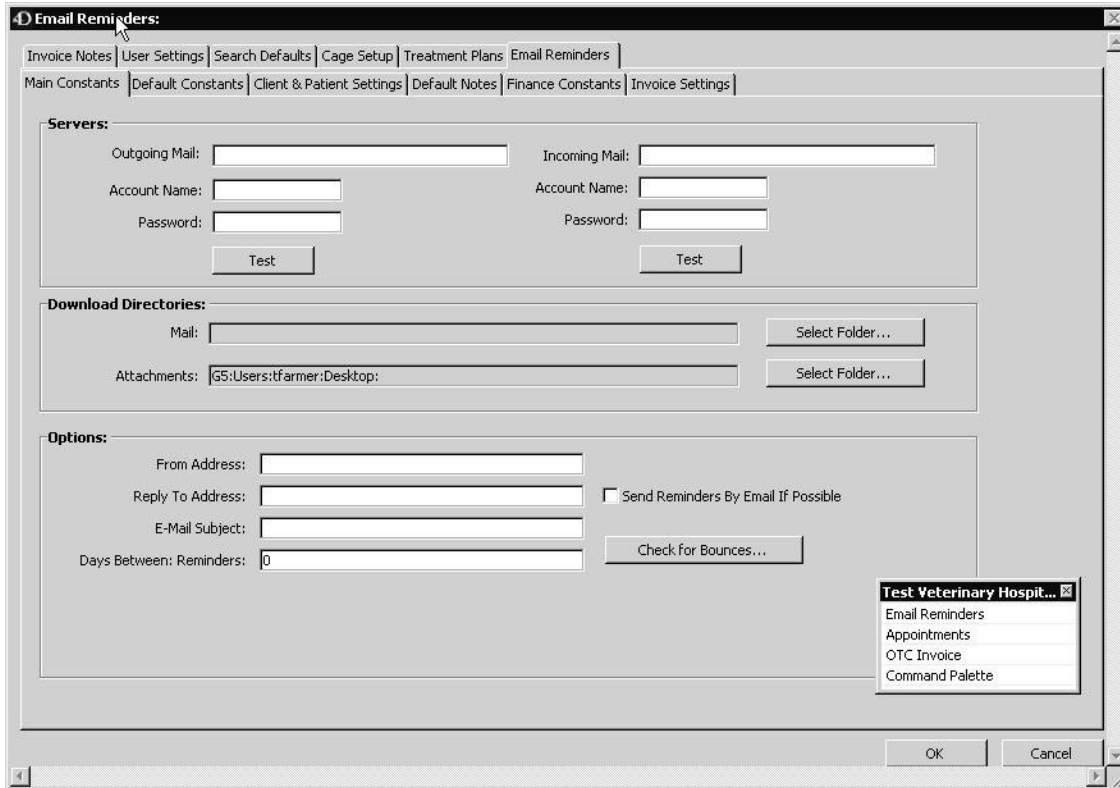
- Type the name of your outgoing email server (also known as an SMTP server) into the **Outgoing Mail** field. DVMAX will send Email Reminders through this server.

- Type the name of your incoming email server (also known as a POP server) into the **Incoming Mail** field. DVMAX will check email from this server for responses and bounce messages.

- Type the name of your email account on the Incoming Mail server into the **Account Name** field, and type your password into the **Password** field. Each character in your password will be replaced with an asterisk (*) as you type.

- Click the first **Select Folder** button to select a directory in which DVMAX will store any mail it receives in response to Email Reminders. Click the second **Select Folder** button to select a directory in which DVMAX will store any attachments received with any mail. These can be the same directory.

- Type a valid email address in the **From Address** field. The address you type here is the address that Email Reminders will be sent from.

- If you wish replies to Email Reminders to be sent to an email address other than the From Address, type it in the **Reply To Address** field. Otherwise, type the same address as in the **From Address** field.

- Type a subject for the Email Reminder in the **E-Mail Subject** field.

- Click the **Send Reminders By Email if Possible** checkbox to enable Email Reminders.

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

HealthyPet Reminders

What Are HealthyPet Reminders?

HealthyPet Reminders are professionally published reminders mailed to your clients on your behalf. HealthyPet reminders can be postcards, newsletters or the HealthyPet Magazine, each customized to list upcoming treatments at your veterinary clinic.

DVMAX can integrate its own powerful internal reminder system with your HealthyPet account. This chapter provides instructions on how to send your DVMAX Reminders to HealthyPet. For more information on DVMAX Reminders, see the Patients chapter of this manual.

Requirements

In order to send your DVMAX reminders to HealthyPet, you will need:

- A valid HealthyPet account number.
- A connection to the internet on the computer running DVMAX.

Setting Up DVMAX to Send Reminders to HealthyPet

To set up the HealthyPet Reminder system in DVMAX, follow these steps:

1. Provide a valid HealthyPet account number.
2. Tell DVMAX to include the date with Reminders.

To enter a HealthyPet Account number, follow these steps:

- Select **System Constants** from the **Section** menu on the DVMAX main screen.
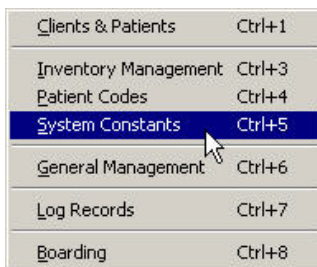
Clients & Patients	Ctrl+1
Inventory Management	Ctrl+3
Patient Codes	Ctrl+4
System Constants	Ctrl+5
General Management	Ctrl+6
Log Records	Ctrl+7
Boarding	Ctrl+8

- From the **System Constants** menu, choose **Default Constants**. Alternatively, click the **Default Constants** tab.
- Type a valid HealthyPet account number in the **HealthyPet Account #** field.
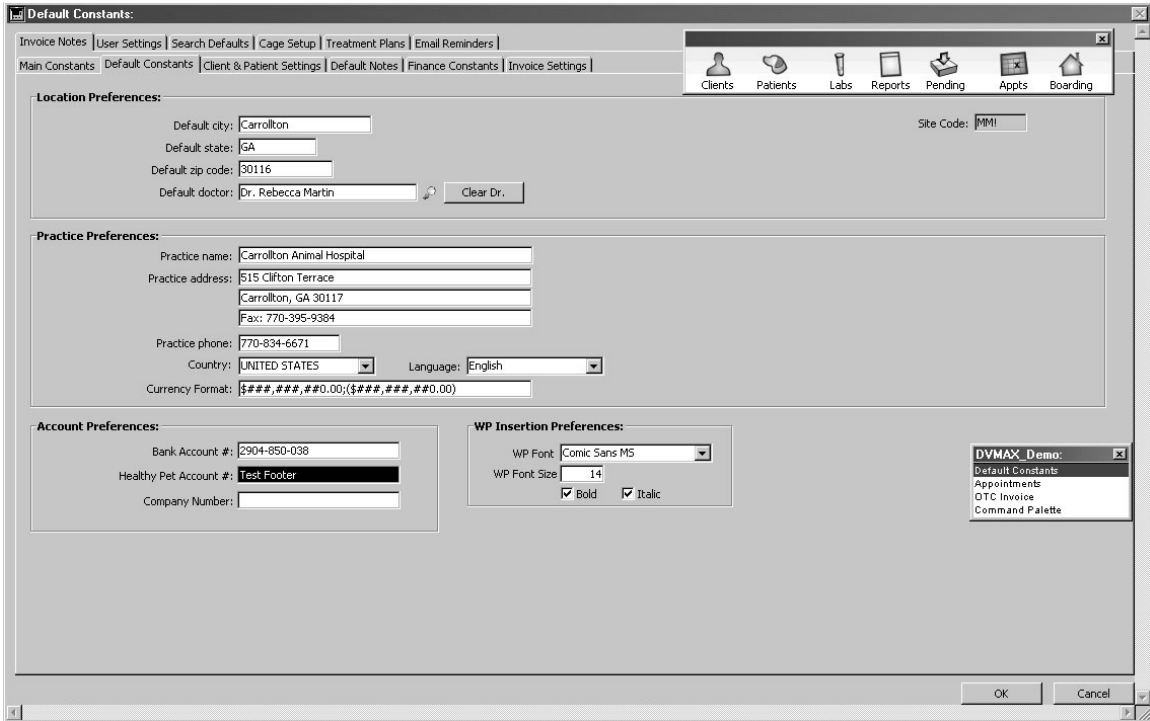
- Click **OK** to save your account number.

- From the **System Constants** menu, choose **Clients & Patients**. Alternatively, click the **Clients & Patients** tab.

- Select **With WP Reminders** under the **Include Dates** heading.

- Click **OK** to save the **Include Dates with WP Reminders** setting.
- Click **OK** to exit System Constants.

Sending DVMAX Reminders to HealthyPet

DVMAX uses the internet to send your Reminders to HealthyPet. The process is simple: you tell DVMAX the range of dates for which you want to send reminders, and DVMAX scans all patient records, removes inactive clients, and sends valid reminders to HealthyPet.

To send DVMAX Reminders to HealthyPet:

- Choose **General Management** from the **Section** menu on the DVMAX main screen.
- Click the **Utilities** tab on the **Management Functions**.
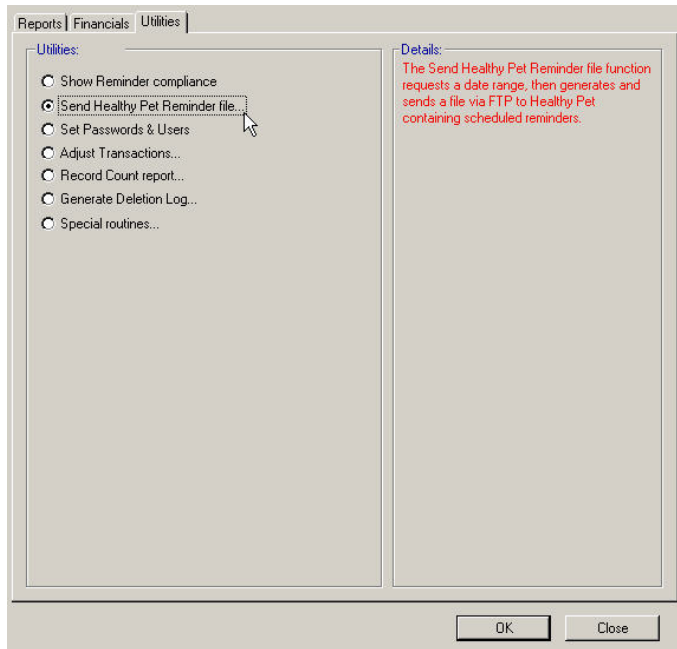
- Select **Send HealthyPet Reminder File** in the list of **Utilities** on the left side of the screen.
- Click **OK**. The **Date Range Entry** screen opens.

- Type the first day for which you wish to send Reminders into the **Starting Date** field. Type the last day for which you wish to send Reminders into the **Ending Date** field.

 All dates in DVMAX must be typed in MM/DD/YYYY format.

- Click **OK** to have DVMAX send your Reminders to HealthyPet.

- DVMAX will notify you when your Reminders have been sent.

- If there were errors sending the Reminders, DVMAX will notify you of these as well.

Technical Details

DVMAX uses FTP (File Transfer Protocol) to send your Reminders to HealthyPet. The relevant FTP information is as follows:

- Server address: ftp.dvmreminder.com.

- User name: DVMAX

- Password: 3pfg45

- Remote directory: /home/DVMAX/incoming

When you tell DVMAX to send your Reminders to HealthyPet, DVMAX creates a temporary file containing your Reminders on your computer. DVMAX then uses FTP to send this file to the HealthyPet FTP server.

The name of this file is a combination of your HealthyPet account number followed by a Date and Time Stamp. If you are using DVMAX SU, DVMAX will save this file in the same directory as your structure file. If you are using DVMAX Client, DVMAX will save this file in the same directory as the DVMAX client application.

DVMAX deletes the temporary file after sending it to the HealthyPet FTP server.

Writing Returns

You can write a return in DVMAX to record the return of inventory to your practice. Returns can also be used to reverse double-billing and other mistaken financial entries. Recording a return reverses sales and production entries and marks inventory as being back in stock. A return has no effect on a patient record. Returns can only be written from a DVMAX client **Finances** tab.

Returns and Invoices

The process of writing a return is very similar to that of writing an invoice. A return is almost an invoice in reverse: on a return, all quantities are negative values; there is a refund method instead of a payment method, and so on.

⚠️ A return will **not** reverse any entries – MREs, Reminders or Recalls - made on a patient's record via an invoice.

⚠️ If you are using DVMAX's integrated credit card and debit card processing feature, please note that you cannot perform a return on a *debit card* transaction, you must use credit card or perform a refund by other pay method.

For more information on invoices, see *Invoicing.*

Writing a Return: An Overview

Returns must be written from the Client Finances tab. For more information on the Client Finances tab, see *Working with Client Records*.

To write a return to a client in DVMAX:

- Choose **Write a Return** from the **Finances** menu on the Client Finances tab.
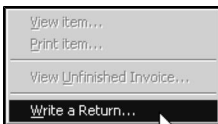
- The **Select Primary Provider** dialog appears. Choose a Primary Provider from the drop-down list in the **Select Primary Provider** dialog.
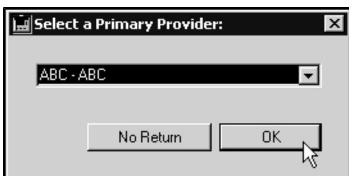
- For information on choosing a Primary Provider, see *Invoicing.*
- The **Return** window opens, with a unique return number and the name client to whom you are issuing this return as the title of the window.

- If necessary, change the Default Dr. for this return by choosing a Doctor from the **Default Dr.** drop-down list.

- If necessary, you can back- or post-date this return by typing a date other than the current date into the **Date** field.

- Type the details of the product or service you are returning in a Line Item row. Include the **Quantity** of the item being returned, **Date** (if different from the current date), **Staff** (if different from the Primary Provider or Default Doctor), **Item Code**, and whether the product or service being return was administered or dispensed.

- The Provider is linked to a Department (see the *Departments* chapter for more information). Each Return line item will be associated with the Department of the Primary Provider (Staff) selected. The Department can be adjusted from the **Department** field of each line item by clicking the drop down arrow.

- Each product or service being returned uses one line item row. To add a line item row, click **Add Line**.

ℹ️ If the line item being returned is a product, it will typically have been dispensed. If the line item being returned is a service, it will typically have been administered.

⚠️ Quantities must be negative when writing a return.

- DVMAX updates the Subtotal, Discount, Taxes, and Total fields as you complete line items. These fields are not editable.

- If you are giving the client a refund, choose a refund method from the **Refund Method** drop-down list.

- If you are giving the client a refund, type the amount of the refund into the **Amount** field. You can also record any notes, such as the reason for the refund, by typing them into the **Refund Note** field.

⚠️ If you do not enter a refund amount, DVMAX will create a credit on the client's account.

⚠️ If you are using DVMAX's integrated credit card and debit card processing feature, please note that some payment providers may not permit a return on a *debit card* transaction. In those cases, you must use credit card or perform a refund by other pay method. If your payment processor does not permit a return using a Debit card transaction and you select **Debit** as pay method, you will see an Alert message noting that this pay method cannot be used for a return.

- If you want to print this refund, select the **Print** checkbox in lower left of the screen.

- Click **OK** to save the refund into the DVMAX system and print the refund (provided **Print** has been selected). DVMAX will return you to the client finances screen.

Adding New Empty Line Items

A setting in System Constants controls the number of line items on a return. If the default number of line items is insufficient for your return:

- Click **Add Line**. A new line item will be created, and your cursor placed in its **Qty** field.

For information on setting the default number of line items on a return, see *System Constants That Affect Invoicing* in the *Invoicing* section of this documentation.

Removing Empty Line Items

If there are more line items on a return then you need, DVMAX will automatically remove them when the return is printed. Empty line items do not appear on printed returns. There is no need to remove unused line items.

Editing a Line Item

Click in the field you wish to edit, and type the new value. Note that some fields are not editable (**Tx** and **Ext. Price**), and that others are not editable most of the time (Description and Price).

Other fields that are dependent on the value you change will update automatically when you enter your new value.

You can also edit a line item by clicking **Edit Line Item**.

Deleting a Line Item

To delete a line item:

- Click once on the line item you wish to delete. The line will be highlighted.

Qty	Date	Staff		Patient		Code	Description		Price	Ext	Tax	
1.00	09/22/04	MC	▾	Fluffy	▾	AS9000	Anesthesia Package		$0.38	$0.38		▴
1.00	09/22/04	MC	▾	Fluffy					$0.00	$0.00		

- Click **Delete Line**.
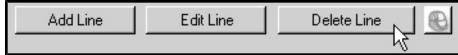
Balances and Totals

The fields to the right of the Refund Method boxes show you the financial totals for this return. Adding line items to a return updates these fields:

Subtotal: The total cost of all the line items on this return, before taxes and discounts.

Discount: The total of all discounts on this return. Discounts can be applied to any or all line items. For more information on discounts, see *Discounts*.

Taxes: Contains the total of all taxes on items listed on this return. Tax rates are set in System Constants – see *System Constants That Affect Invoicing* in the *Invoicing* section of this documentation for more information. Whether an individual line item is taxable is determined in the setup for that item – see the *Bill Items* chapter for more information.

Total: Is the subtotal minus the discount, with taxes added.

Previous Balance: The amount owed by this client from any previous invoices.

Payments: Total refunds issued with this return.

New Balance: The amount owed by this client on all invoices. The New Balance is the sum of the Total and Previous Balance minus Payments.

Discounts on Returns

You can apply a discount to any or all line items on a return. Line items that have a discount applied are marked with an asterisk (*) following their description.

If a client has a Default Discount, DVMAX will automatically discount line items on a return for this client. You can override this default discount. For more information on Default Discounts for clients, see *Working With Client Records*.

 You should discount items on a return in the same manner as they were discounted on the original invoice.

Applying a Discount to All Line Items on a Return

To apply a discount to all line items:

- Choose **Discount** from the **Return** menu.
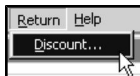
- The **Discount Settings** window opens.
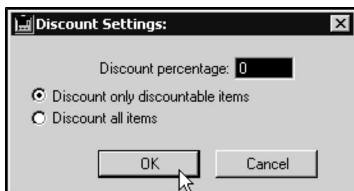
- Type a percentage in the **Discount Percentage** field. DVMAX will discount the price of all items on the return by the percentage you specify here.

- Select **Discount All Items** to apply the discount to all items on the return

-OR-
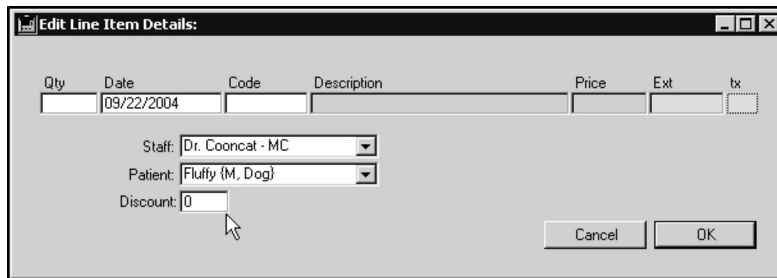
- Select **Discount Only Discountable Items** to have DVMAX apply the discount only to items marked as discountable. For more information on the difference between these settings, see the *Bill Items* chapter of this manual.

- Click **OK** to apply the discount.

⚠ A setting in System Constants controls the availability of the **Discount All Items** radio button. If the **Discount All Items** radio button is not available, you will not be able to apply a discount to line items that are not specified as discountable in their Bill Item setup. For more information, see the Bill Items chapter of this manual, and System Constants that Affect Invoicing in the Invoicing chapter.

Applying a Discount to a Single Line Item on A Return

To apply a discount to a single line item:

- Select the line item you wish to discount, then click the **Edit Line** button. The **Edit Line Item Window** open.

- Type the percentage of the discount in the **Discount** box.

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

ℹ Not all items are discountable. For more information on discountable items, see Bill Items.

Viewing Past Returns

DVMAX lists all returns in the **Recent Finances** and **All Finances** areas of the **Client Finances** tab. Returns are listed as type "Rtrn".

To view a previously-posted Return:

- Double-click the Return in either the **Recent Finances** or **All Finances** area of the **Client Finances** tab.

-OR-

- Click once to select the Return you wish to see in either the **Recent Finances** or **All Finances** area of the **Client Finances** tab.
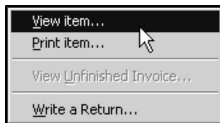
- Choose **View Item** from the **Finances** drop-down menu.

rVetLink and DVMAX

rVetLink allows automated communication between specialty clinics and referring veterinarians. With rVetLink - DVMAX integration, you can control what you share with referring clinics directly from DVMAX – appointments, MREs, diagnoses and more. Give referring clinics 24/7 access to patient updates via the rVetLink portal. To use this feature, you will need to have an rVetLink account set up, then work with an rVetLink on-boarding specialist to configure rVet-Link integration.

This chapter outlines how to work with DVMAX and rVetLink once rVetLink integration is complete. Read the chapter **Integrations, Requisitions and Lab Results** for details on the process of configuring rVetLink integration. For more information about IDEXX rVetLink, visit rvet-link.com.

Setting Up rVetLink Integration with DVMAX

Before you can use the DVMAX-specific rVetLink features, you need to configure rVetLink integration via the Integrations Wizard (**Section** -> **General Management** -> **Utilities** -> **Integrations Setup Wizard**). Configuring rVetLink integration consists of entering your clinic's rVetLink account details and then identifying which DVMAX events or activities will be shared with referring clinics via the rVetLink portal. You can choose from sections like Appointments, Diagnoses, Word Processing and MREs and more.

Refer to the DVMAX/rVetLink setup information in the chapter **Integration, Requisitions and Lab Results** for details on configuring rVetLink integration.

⚠️ Access to the rVetLink Setup area of the Integrations Wizard is controlled by an advanced setting and you will need to work with an rVetLink on-boarding specialist to configure your rVet-Link integration. The setup details provided in the rVetlink section of the Integrations, Requisitions and Lab Results chapter of the user manual will help you understand the information you will need to gather so you are ready to work with the on-boarding specialist.

Opening rVetLink in DVMAX

To open rVetlink in DVMAX, click the **rVetLink** icon from the Command Palette.
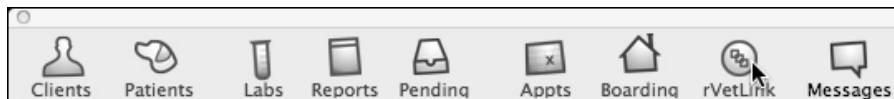
If your clinic is not employing rVetLink or if rVetLink is not configured to work with DVMAX, you will see a dialog with a note about rVetLink and where to go for more information on rVet-Link.

About the rVetLink Window

The rVetLink window is a tabbed dialog with 2 tabs: the **Referral** tab and the **Portal** tab. Depending on your configuration, the Portal tab may not be available.

The Referral tab allows you to manage your referrals by assigning them to an existing DVMAX client record or creating new DVMAX client and patient records for the referrals. The Portal tab gives you access to the rVetLink portal, where you can review the content that you have provided to referring clinics on a per clinic basis.

ⓘ Depending on your configuration, the Portal tab of the rVetLink dialog may not be displayed. Contact DVMAX Technical Support if you have questions.

Close the rVetLink Window

To close the rVetLink window, click **Close** in the bottom right corner of the rVetLink Window.

The rVetLink Referral Tab

The rVetLink Referral tab is divided into 3 sections – A) the Referral List, B) the Referral Record Detail area and the C) rVetLink Activity Summary area.

About the Referral (Patients) List

The Referral List area of the rVetLink Referrals tab displays a list of all patients referred to the clinic. There are 5 search fields above the list that you can use to find records: **Patients**, **Clients**, **Specialty**, **Date Received** (date the referral request was received) and rVetlink referral record **Status**. The referral list is color-coded to offer a quick overview of any clinic-based activity around the records. New, unassigned referrals are listed as orange. This is the default color of all incoming referral records. Once you select a record and click **Assign**, you can decide to assign the record to an existing DVMAX client and patient, create both a new client and patient record in DVMAX for the referral, assign the patient connected with the referral to a client record already in DVMAX or refuse a referral. Each of those actions will change the color of the referral record shown on the Referral List.
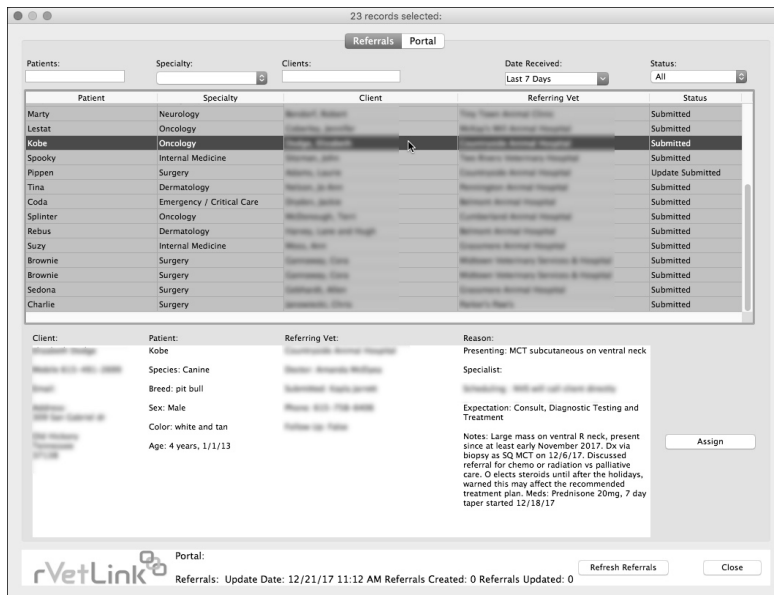
Orange – The default color of all new, unassigned rVetLink Referral records.

White or Gray – A white or gray record indicates a referral record that has been assigned to a record in DVMAX. This includes the following: 1) Records that have been added as new client and patient records in DVMAX (see **Create a DVMAX Client and Patient Record for a New Referral**); 2) Referral records assigned to a matching client and associated patient record in DVMAX (see **Assign a Referral to an Existing DVMAX Client and Patient**); or 3) Referral records assigned to a matching client record in DVMAX where the associated patient is new (see **Add New Patient from Referral**).

Blue – A blue record indicates a referral that has been reviewed and refused. DVMAX allows you to assign a refused record at a later time if you erroneously refused a referral or you change your mind. See **Refuse a Referral** for more information.

What Is an Assigned Record?

An assigned record means that an rVetLink referral is linked to a DVMAX client and patient record. You can assign a referral record to an existing DVMAX record or create a new record in DVMAX from a referral. This saves you the step of having to manually create a DVMAX client and patient record for a referral. Automatically created client and patient records may be incomplete, since details provided by the rVetLink referral record can vary widely. You should review the records and update as desired. Assigning a referral record will add an rVetLink MRE to a DVMAX record under patient History.

Assigning a referral record is a straightforward, 3 step process:

1. Identify the referral record you want to assign.
2. Click **Assign** from the Referral tab of the rVetLink main window.
3. From the Assign/Create/Client/Patient dialog, decide how you want to assign the referral. You can choose to assign the referral to an existing DVMAX record (where a matching record exists), create a new DVMAX record for the referral or refuse the referral. See the relevant sections in this rVetLink chapter for more detail on these options.

Searching for Referral Records

You can search the list of Referral records using the search fields on main Referral tab. Search fields can be used individually or in combination.

Search by Patient or Client: To search by **Patient** and/or **Client**, type a name or partial name in the name field and then tab out of the field. The list will be filtered by the text you type.

Search by Specialty: To search by specialty, make a selection from the **Specialty** drop down menu.

Search by Date Received: For **Date Received**, you can also type a number of days back using the format "-X", where X is the number of days back you would like to search. For example, to search for referral records received in the last 10 days, type "-10" in the **Date Received** field.

Search by Status: To search by rVetLink referral **Status**, choose **Submitted**, **Update Submitted** or **All** from the **Status** drop down menu.

View a Referral Record

To view details of a Referral record, click to select a record from the list. Basic information on the client and patient, referring veterinarian/clinic and reason for referral will display in the Referral Record Detail area of the Referral tab. Click **Assign** to link the record to a DVMAX record or to refuse the referral. When you click **Assign**, the Assign/Create/Client/Patient dialog opens. You can choose from 4 options: Assign, Create, New Patient and Refuse.
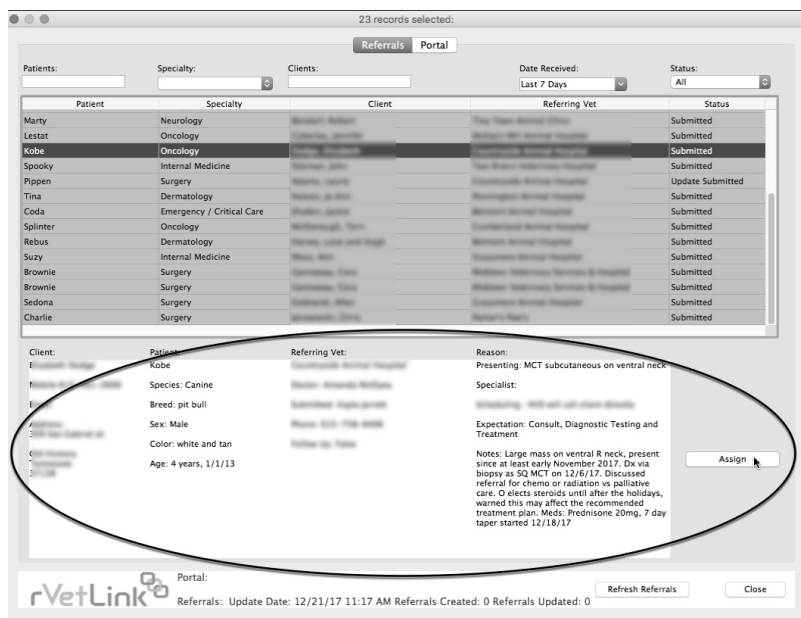
The Referral Record Detail Area

When you select a referral record from the referral list, the Referral Detail area will display information about the referral. This information is coming directly from rVetLink as provided by the referring clinic. Details include client and patient information, referring vet information and an overview of the reason for the referral. The Referral Detail area is a large white section located just below the list of referral records.
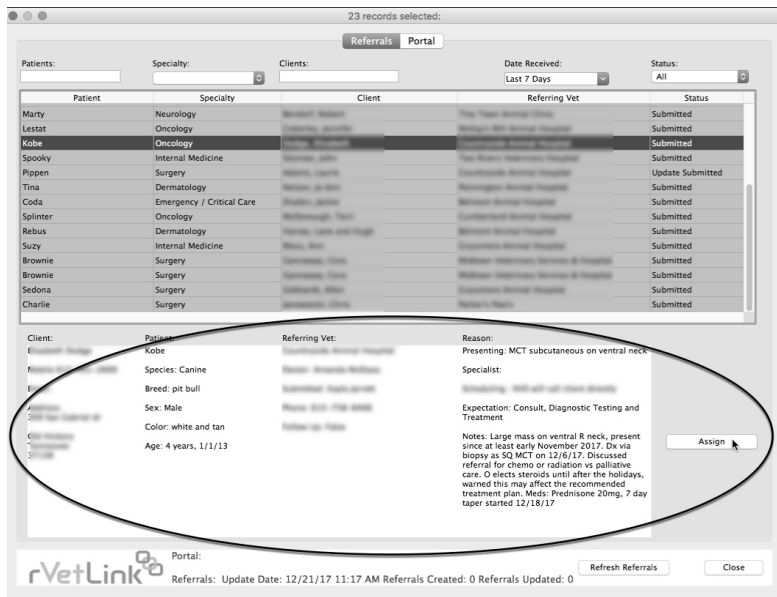
To assign the referral to an existing record in DVMAX, create a new record in DVMAX or mark the referral as refused, click the **Assign** button beside the Detail Area. Once a referral has been Assigned, the **Assign** button will read **Go to Record** or **Refused**, depending on the action taken with the assign process.

About the Assign/Create/Patient/Client Dialog

When you click **Assign** from the Referral tab of the rVetLink window, the Assign/Create/Patient/Client dialog will display. This is where you decide how you want to the referral to your DVMAX records.
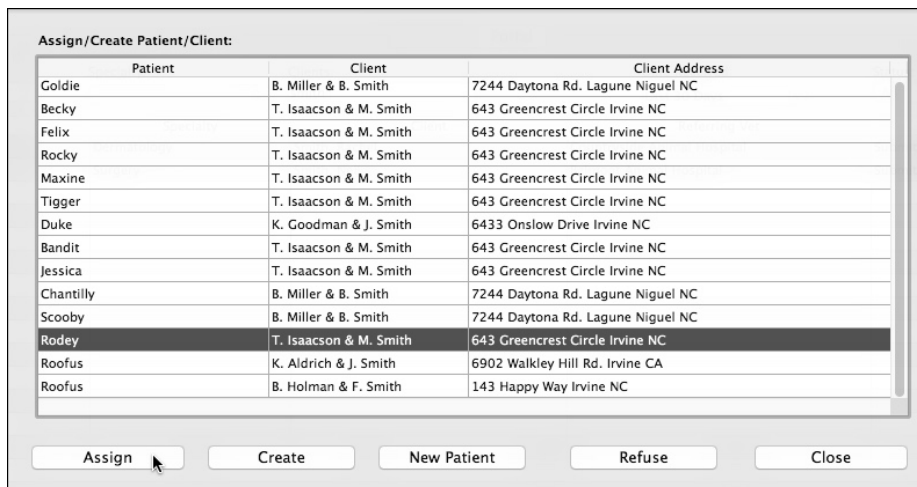
You can choose from the following options:

Assign - Assign a selected referral record to an existing DVMAX client and patient. This option is used where the referral record matches an existing DVMAX client **and** associated patient record.

Create – Create a new DVMAX client and patient records for this referral. This option is used where both the client and associated patient are new to your clinic. You will create new client and patient records in DVMAX based on the information in the rVetLink referral record.

New Patient – Use this option to create a new DVMAX patient record from this referral record for an existing DVMAX client. This option will add a new patient to an existing DVMAX client and create a new patient record.

Refuse – Use this option where you do not want to accept this referral. No data will be saved in a DVMAX client or patient record for this referral. If you refuse a record accidentally, you can go back to the Referrals List, select the record again and make a different selection.

Assign an rVetLink Referral to a DVMAX Client and Patient

The **Assign** option from the Assign/Create/Client/Patient dialog is used when the selected referral record matches an existing DVMAX client **and** associated patient record. To assign an rVetLink referral to an existing DVMAX client and patient:

- From the rVetLink Referral List, click to select the record you would like to assign. Use the search filters if needed to find the record you want to assign.

- Click **Assign**.

- The Assign/Create/Patient/Client dialog will open. If the selected referral record matches a client name or partial name, you will be presented with a list of one or more DVMAX records. If there is no matching client record, the dialog will contain no results and indicate no match was found. See **Create a DVMAX Client and Patient Record for a New Referral**.

- The **Assign** button will only be available if there is at least one matching client in your clinic's DVMAX datafile, as might occur if either the client and patient had been to the clinic before OR the client name matches/partially matches a name in your DVMAX records.

- Click to select the record you want to assign from the list.

- To assign this referral to an existing DVMAX record, click **Assign**. Clicking Assign will NOT create a new record because the client and patient records already exist. Note that there may be multiple matches for the referral record, since DVMAX includes all clients with a matching last name in on the list. Take care to confirm you have identified the correct client and patient before clicking **Assign**.
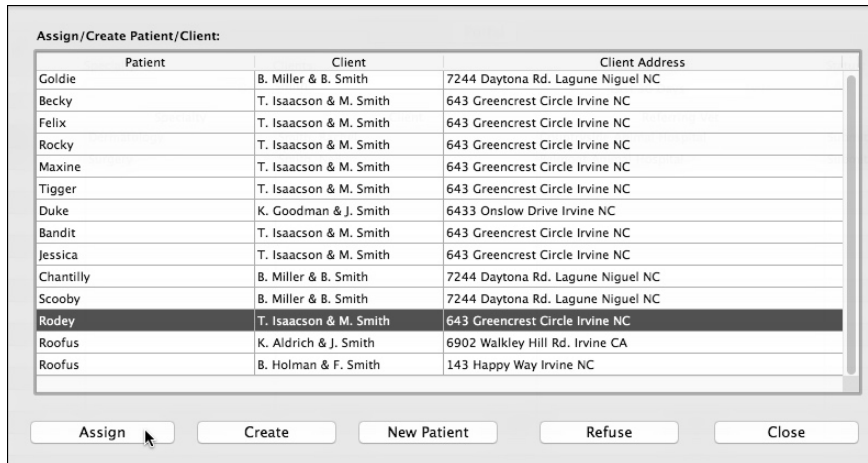
- Once the record has been assigned to a client and patient record in DVMAX, the **Assign** button on the Referral tab of the main rVetLink window will read **Go to Patient**. Clicking the **Go toPatient** button will open the DVMAX patient record associated with the referral.

Create a DVMAX Client and Patient Record for a New Referral

The Create option is used where both the client and associated patient are new to your clinic. You will create new client and patient records in DVMAX based on the information in the rVetLink referral record. The Create button is always an available option. To create a new client and associated patient record for the referral:

- From the rVetLink Referral List, click to select the record you would like to assign to a new DVMAX file. Use the search filters if needed to find the record.

- Click **Assign** from the Referral tab of the rVetLink main window.

- The Assign/Create/Patient/Client dialog will open. For new referrals, there should be no matching client record, so the dialog will contain no results and indicate no match was found. (If matching records are found, you can also choose to assign the record. See **Assign an rVetLink Referral toa DVMAX Client and Patient**.)

- To assign this referral to new DVMAX client and patient records, click **Create**. You will create a new client and patient record in DVMAX based on the information in the rVetLink referral record. Two new MREs will be added to the new patient record, one for referring doctor and one with the referral notes taken from the rVetLink referral record.

- Once the Client and Patient records have been created, the **Assign** button on the Referral tab of the main rVetLink window will read **Go to Patient**. Clicking the **Go toPatient** button will open the patient record associated with the referral.

Add New Patient from a Referral (Client Record Exists)

Use the New Patient option to create a new DVMAX patient record from this referral record for an existing DVMAX client. This option will add a new patient to an existing DVMAX client and create a new patient record. The New Patient button is typically used when the client has been to the clinic before (so they will have a record already) but is bringing a new patient. So, if John Smith had been referred to the clinic last year with Fluffy and was now being referred with patient, Buddy, a new patient record would need to be created for Buddy. To create a new patient record from the referral:

- From the rVetLink Referral List, click to select the record you would like to assign. Use the search filters if needed to find the record you want to assign.

- Click **Assign**.

- The Assign/Create/Patient/Client dialog will open. If the selected referral record matches a client name or partial name, you will be presented with a list of one or more DVMAX records. Click to select the record representing the DVMAX client for which you want to add a new patient.

- Click **New Patient**. This will create a new patient record for the associated client based on patient details contained in the referral record. Note that there may be multiple matches for the client based on the selected referral record, since the Assign/Create/Patient/Client list includes all DVMAX clients with a matching last name. Take care to confirm you have identified the correct client and patient before clicking **New Patient**.

- Once a record has been created, the **Assign** button on the Referral tab of the main rVetLink window will read **Go to Patient**. Clicking the **Go toPatient** button will open the patient record associated with the referral. See **Assign/Create/Patient/Client** for more detail on features associated with this dialog.

Refuse a Referral

Use this option where you do not want to accept this referral. No data will be saved in a DVMAX client or patient record for this referral. To refuse a referral:

- From the rVetLink Referral List, click to select the record you would like to assign. Use the search filters if needed to find the record you want to assign.

- Click **Assign**. This will take you to the Assign options, which will let you choose **Refuse**.

- The Assign/Create/Patient/Client dialog will open. If the selected referral record matches a client name or partial name, you will be presented with a list of one or more DVMAX records, otherwise the dialog will indicate there is no matching record. Click to select the record representing the referral you want to refuse.

- Click **Refuse**. No record is created or assigned to any existing record in the clinic database.

- Once a record has been refused, the **Assign** button on the Referral tab of the main rVetLink window will read **Refused**. Clicking the **Refused** button will open the Assign/Create/Patient/Client dialog. If you refuse a record accidentally, you can go back to the Referrals tab on the rVetLink window, select the record again and repeat the Assign process by clicking the **Refused** button to open the Assign/Create/Patient/Client dialog.

The rVetLink Referral Activity Summary

The rVetLink Referral Activity Summary area, located at the bottom of the rVetlink window, gives you an up-to-date report on the number of new rVetLink referrals and number of rVetLink referral updates since the last refresh. The date and time of the last refresh is indicated as well. The referrals list and status information is updated automatically at regular intervals (defined under Advanced Settings), but you can click the **Refresh Referrals** button to refresh the list manually.
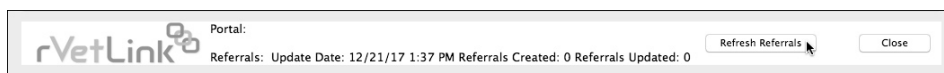
Go to Patient (View Patient Record from Referral Tab)

Once referral records have been Assigned, whether by assigning to existing DVMAX records or creating a new record in DVMAX, the **Assign** button on the main Referrals list will read **Go to Patient**.

If a Referral record has been refused, the button will read **Refused**.
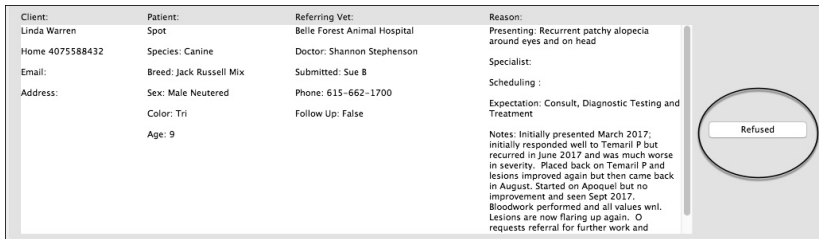
The rVetLink Portal Tab

The rVetLink Portal tab allows you to see what the referring clinic sees. This is the same functionality as you would find directly from the rVetLink portal outside of DVMAX. You will have to log in to rVetLink with your username and password, then you can access the rVetLink portal.

Depending on your system settings, you may not see the rVetLink Portal tab.

Shared Dictionary

DVMAX's spell checking feature included in the **Word Processing** function relies on a dictionary installed with the application. This dictionary contains standard and medical references, and new words can be added to customize the dictionary for your practice. In order for all workstations at your location to have access to the same dictionary, you must set up DVMAX Preferences to share a dictionary.

Selecting a Shared Dictionary

⚠️ Setting the shared dictionary must be done on all workstations.

To set **Preferences** to Share a dictionary:

- Select **Preferences** from the **File** drop-down menu.
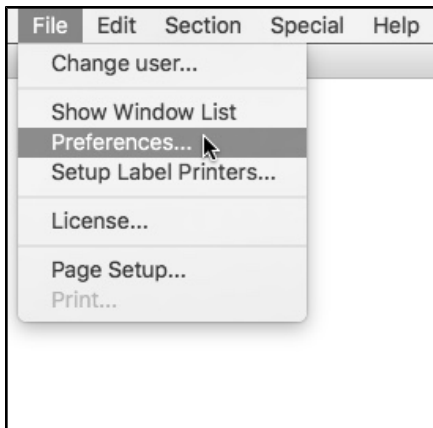
- Click to select the **Assorted Prefs** tab from the **Preferences** dialog.
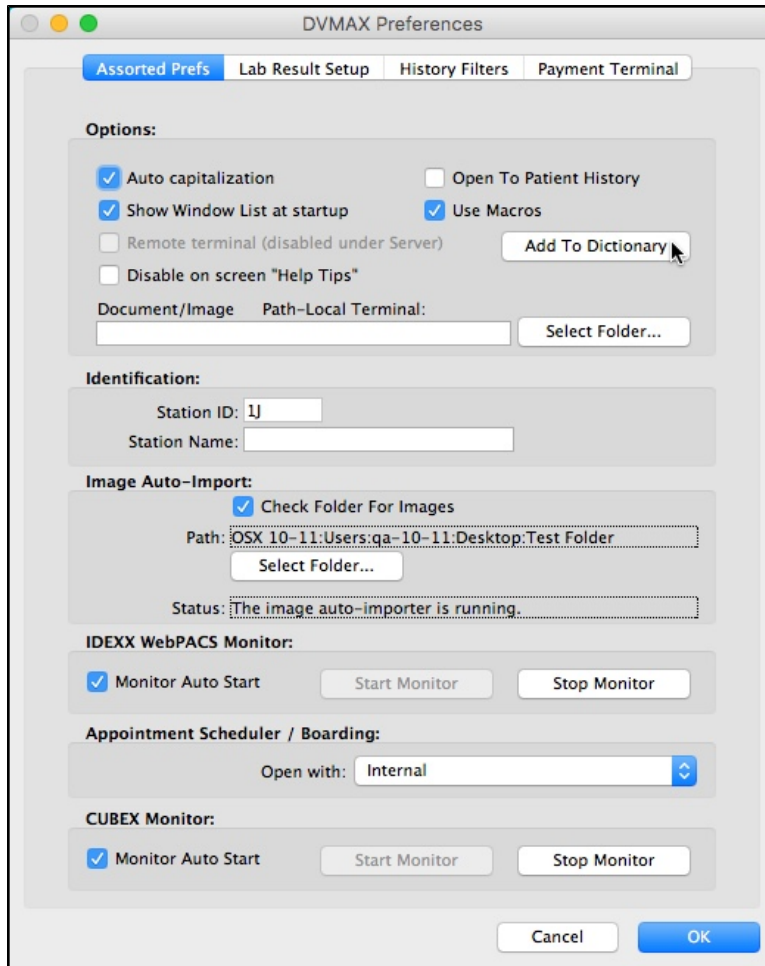
- From the Assorted Prefs tab, Click **Add to Dictionary**.

- Click **Add** from the **Confirm** dialog to continue and set up a Shared dictionary. Click **Don't Add** to cancel and return to **Preferences**.
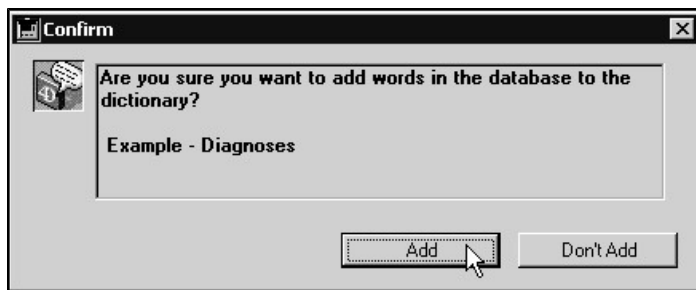
ℹ The steps to this point are the same for adding words to the existing dictionary as they are for setting up a shared dictionary. If you have already set up a **Shared** dictionary, clicking **Add** will update your dictionary with any new words found in the database. If you have not set up a

Shared dictionary, you will see a message window after you click **Add**. You must continue with the necessary steps as directed to set the shared dictionary.

- If you have not set up a **Shared** dictionary, a message window opens directing you to click the **Options** button on the window that opens next (the Spelling dialog window) to set a **Shared** dictionary. It is not possible to cancel the operation at this point.
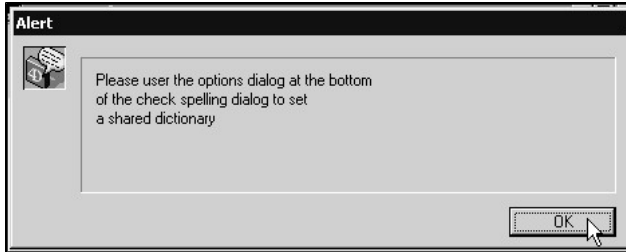
- Click **Options** at the bottom of the **Spelling** dialog to open the **SpellingOptions** dialog.
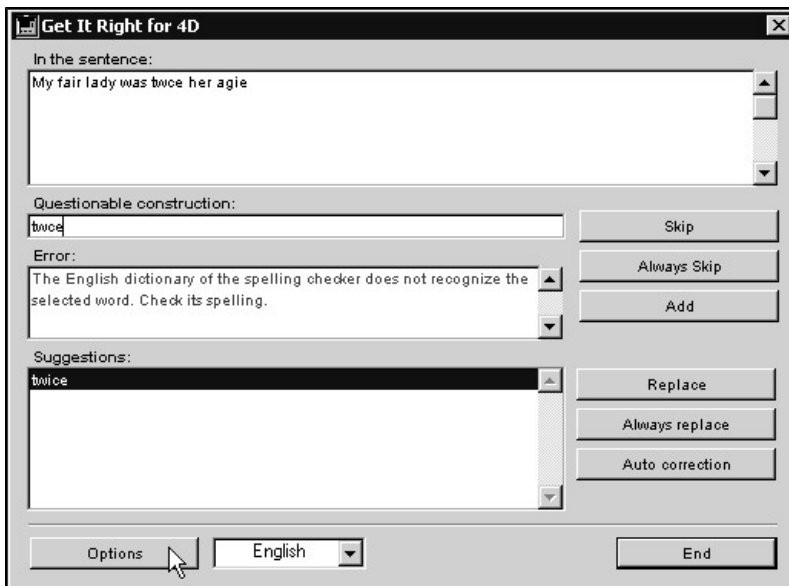
- Select **Shared** from the **Lexicon** area of the **Options** window to make the dictionary available to the current workstation. Click again to deselect.
- Click **Accept** to share the dictionary.

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- The dictionary will be updated. This may take several minutes. A progress bar will be shown.
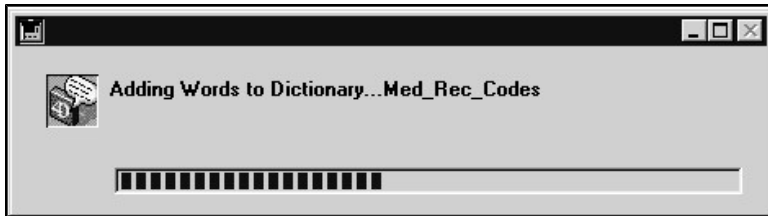
Species Records

Species records allow you to standardize the way you classify your patients in DVMAX. Setting up Species records properly allows DVMAX to make certain species-specific adjustments to a patient's record.

Species records also allow DVMAX to prompt you to add Reminders when first creating a patient record. Species records are closely related to **Breed** records. See **Breed Records** for more information.

Viewing All Species Records

To view a list of all Species records defined in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu.
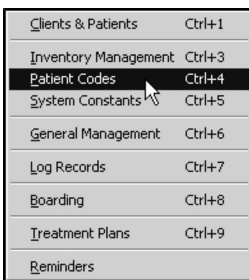
- From the **Find Window** choose **Species** from the **Search For** drop-down list.

- Click **All Records** at the bottom of the **Find** window. A list of all Species records defined in DVMAX displays.

- Each Species record is listed on an individual line.

Finding a Species Record

To find a Species record in DVMAX:

- Choose **Patient Codes** from the **Section** drop-down menu.
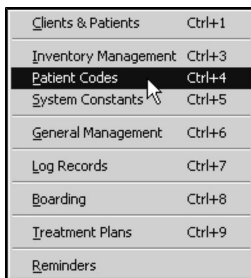
- From the **Find** window, choose **Species** from the **Search For** drop-down list.
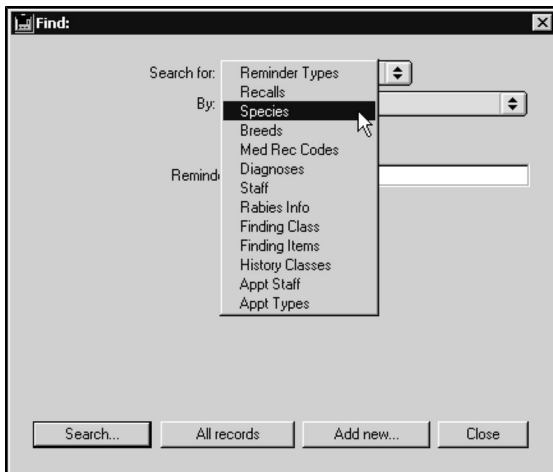
- Choose **Species Code** from the **By** drop-down list to search Species records by code. You must type at least the first character of the species code you are searching for. Choose **Keyword in Species** to find any Species records by name. Choose **General** to conduct a custom Species record search. See the chapter on **General Searches** for more information.

- Unless you selected **General**, type a Species code or name into the field below the **By** drop-down list. If you are searching by code, you must type at least the first few letters of the species code. If you are searching by name, DVMAX will find all species that contain the word you type.

- Click **Search**.

- If there is more than one match for your search, the Species List window will display containing a list of items that matched your search.
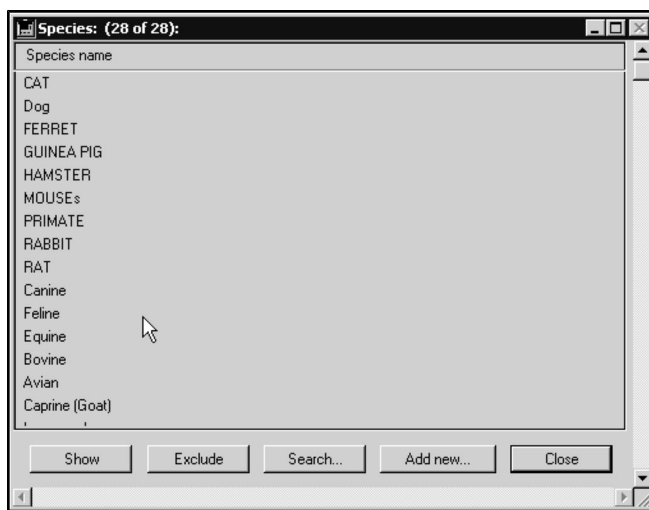
- If there is only one Species record that matches your criteria, DVMAX will open that Species record.

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

 You can also quickly locate a Species by following the steps in **Viewing All Species Records** and double clicking a record from the list.

Species Names and Sex Nomenclature

Sex nomenclature is different for different species. DVMAX handles this by adjusting the patient records for various species according to specific text in the name field of the Species record.

For example, for a species to be recognized as equine, the word "equine" must appear as part of the Species name. This means DVMAX recognizes each of "Equine", "Horse (Equine)", and "Equine (Horse)" as an Equine species.

Below is a list of the specially recognized species and how they are reflected in the sex nomenclature of patient records:

Equine: If "equine" appears anywhere in the species name, sex nomenclature on the patient record is automatically converted to equine terminology (Mare, Stallion, Gelding, Colt, Filly).

The "equine" keyword can also help trigger DVMAX to use the Thoroughbred aging system for a patient. See **Breed Names and January Aging** in the **Breed Records** chapter for more information.

Avian and Reptile: If "avian" or "reptile" appear anywhere in the species name, sex nomenclature on the patient record is changed so that the **Spayed/Neutered** field is instead a **Sexed /Not Sexed** field. When the patient is marked as "not sexed", the M/F options convert to "N/A".
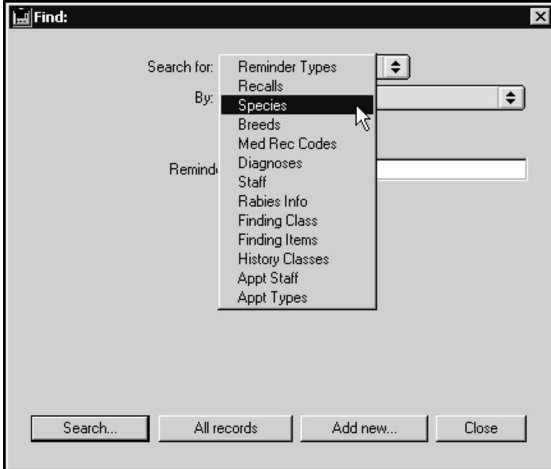
Creating a New Species Record
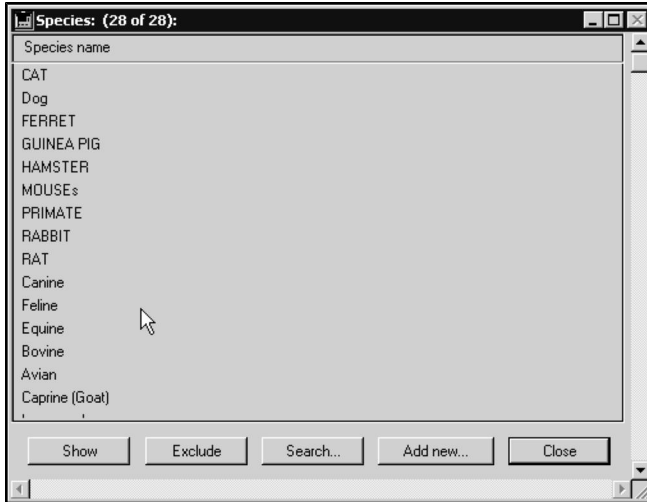
To create a new Species record in DVMAX:

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

- From the **Find** window, choose **Species** from the **Search For** drop-down list.
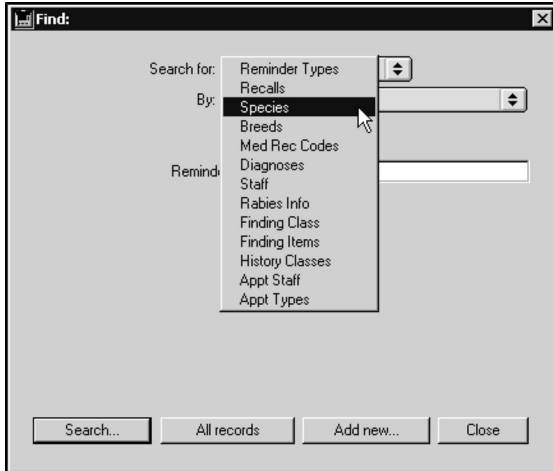
- Click **Add New** at the bottom of the **Find** window.


- The **New Species Record** window opens.
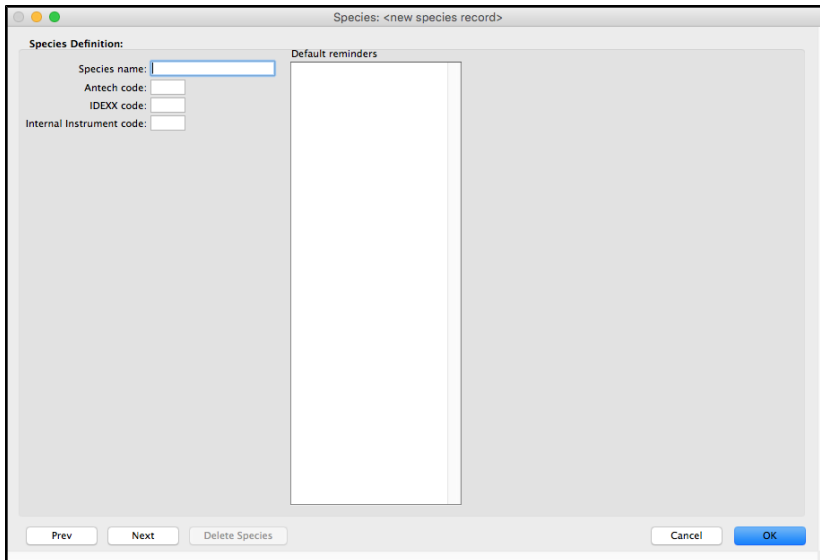
- Type a unique name in the **Species Name** field.

- Type a valid Antech requisition code in this field if you plan to use DVMAX's Antech barcode label feature. Alternatively, you can add this after the fact using the **Integrations Wizard** to link the Antech/Zoasis code to the species record from the Species area of Antech setup. The DVMAX Species Code record is automatically updated when you link the DVMAX species code with the Provider code in the Requisition Wizard.

- If you use IDEXX Reference Lab, type a valid IDEXX code in the **IDEXX** field. Alternatively, you can add this after the fact using the **Integrations Wizard** to link the IDEXX code to the species record from the Species area of IDEXX setup. The DVMAX Species Code record is automatically updated

when you link the DVMAX species code with the Provider code in the Requisition Wizard.

- If you use IDEXX VetLab station and in-house instruments, type a valid code in the **Internal Instrument Code** field. Alternatively, you can add this after the fact using the **Integrations Wizard** to link the IDEXX code to the species record from the Species area of IDEXX setup. The DVMAX Species Code record is automatically updated when you link the DVMAX species code with the Provider code in the Requisition Wizard.

ℹ See **Species Names** and **Sex Nomenclature** for information on special Species names.

- If desired, double click in the **Default Reminders** field to set the default Reminders DVMAX will add when you create a record for a patient of this species.

-OR-

- Choose **Add Default Reminder** from the **Species** drop down menu to set the list of default Reminders DVMAX will add when you create a record for a patient of this species.

ℹ Default reminders are used when you manually add the first reminder to a patient's record. They do not affect reminders added by invoices.

- The **Add Default Reminder** dialog opens.
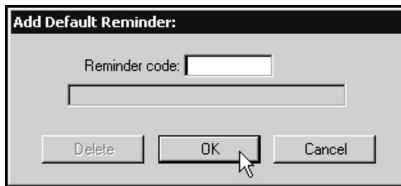
- Type a code into the **Reminder Code** field in the **Add Default Reminder** dialog. See **Reminders** for more information about Reminders.

ℹ If do not know the exact reminder code, type the first letter into the **Reminder Code** field and press **TAB**. This will bring up a window listing all existing codes.
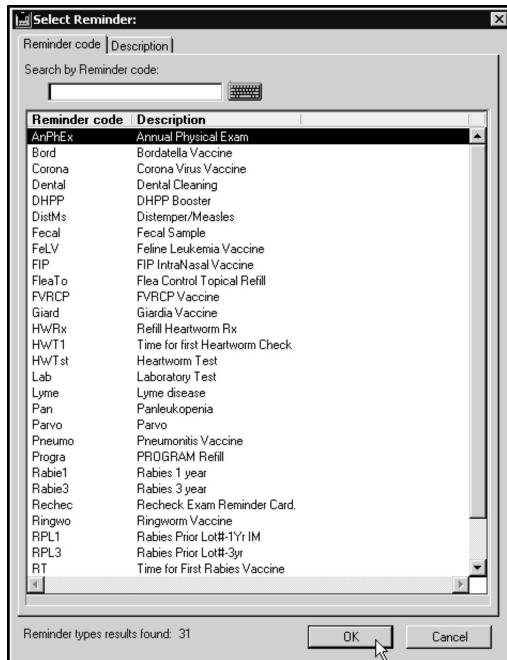
- Click **OK** to save the Species record.

Linking DVMAX Species Codes to Antech/Zoasis Species Codes

The species codes that DVMAX uses to identify animal species may not be the same one used by all in-house lab instruments and external lab providers. Linking the DVMAX species code to the Provider code permits more accurate requisition information to flow from DVMAX to the Provider and back. The easiest way to link DVMAX Species codes with Antech/Zoasis Species codes is via the **Integrations Wizard**.

- Open the **Integrations Wizard** from the **Utilities** tab of **General Management**.

- Select Antech/Zoasis from the **Provider** menu.

- From the Antech/Zoasis **Species** tab, double click a DVMAX species record you want to associate with an Antech/Zoasis species code.

- If you like, use the **Filter** field to constrain the list of records to records containing what you type.

- From the Species List, click to select the Antech/Zoasis species to associate with the DVMAX species record.

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

The DVMAX Species Code record is automatically updated when you link the DVMAX species code with the Provider code in the Requisition Wizard.

Linking DVMAX Species Codes to IDEXX Species Codes

The species codes that DVMAX uses to identify animal species may not be the same one used by all in-house lab instruments and external lab providers. Linking the DVMAX species code to the Provider code permits more accurate requisition information to flow from DVMAX to the

Provider and back. The easiest way to link DVMAX Species codes with IDEXX Species codes is via the **Integrations Wizard**.

- Open the **Integrations Wizard** from the **Utilities** tab of **General Management**.

- Select IDEXX from the **Provider** menu.

- From the IDEXX **Species** tab, double click a DVMAX species record you want to associate with an IDEXX species code.

- If you like, use the **Filter** field to constrain the list of records to records containing what you type.

- From the Species List, click to select the IDEXX species to associate with the DVMAX species record.

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

The DVMAX Species Code record is automatically updated when you link the DVMAX species code with the Provider code in the Requisition Wizard.
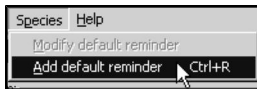
Linking DVMAX Species Codes to VetLab Species Codes

The species codes that DVMAX uses to identify animal species may not be the same one used by all in-house lab instruments and external lab providers. Linking the DVMAX species code to the Provider code permits more accurate requisition information to flow from DVMAX to the Provider and back. The easiest way to link DVMAX Species codes with VetLab (**Internal Instrument Code** on the Species record dialog) is via the **Integrations Wizard**.

- Open the **Integrations Wizard** from the **Utilities** tab of **General Management**.

- Select **VetLab** from the **Provider** menu.

- From the VetLab **Species** tab, double click a DVMAX species record you want to associate with a VetLab species code.
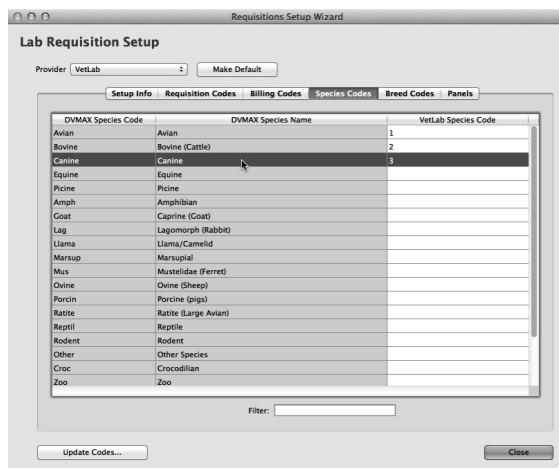
- If you like, use the **Filter** field to constrain the list of records to records containing what you type.

- From the Species List, click to select the VetLab species to associate with the DVMAX species record.
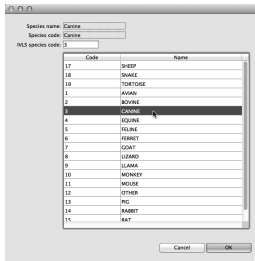
- Click **OK** to save the selection.

The DVMAX Species Code record is automatically updated when you link the DVMAX species code with the Provider code in the Requisition Wizard.
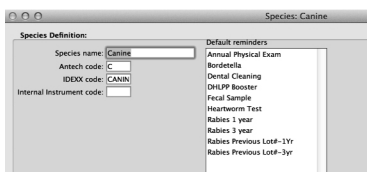
Default Species Reminders

DVMAX can automatically present one or more Reminders to choose from when you first add a Reminder to a patient's record. These default Reminders are set in the Species record.

For information on adding a default Species Reminder, see **Creating a New Species Record**.

Modifying a Default Species Reminder

You can modify a default Species Reminder at any time from the Species record. To modify a default Species Reminder:

- From the **Default Reminders** list, double-click the Reminder you wish to change

-OR-
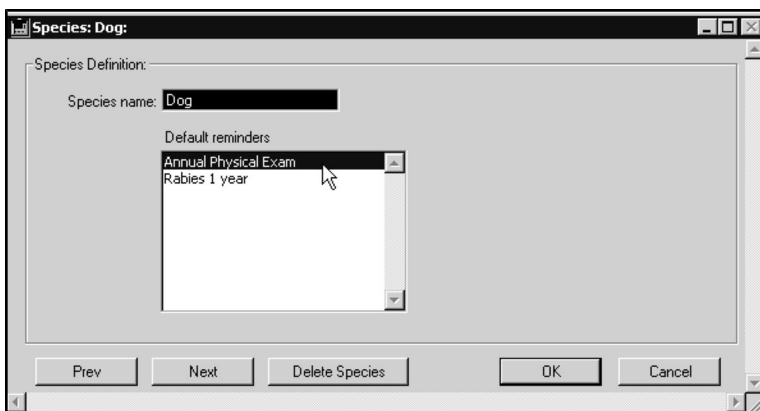
- Click to select the Reminder you wish to modify in the **Default Reminders** list, and then choose **Modify Default Reminder** from the **Species** drop-down menu.
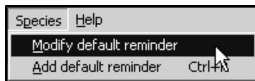
- The **Modify Default Reminder** dialog opens.
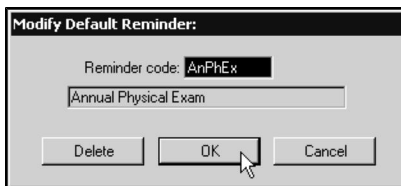
- Type a different Reminder Code into the **Reminder Code** field of the **Modify Default Reminder** dialog, or type the first letter into the **Reminder Code** field and press **TAB**. This will bring up a window listing all existing codes.
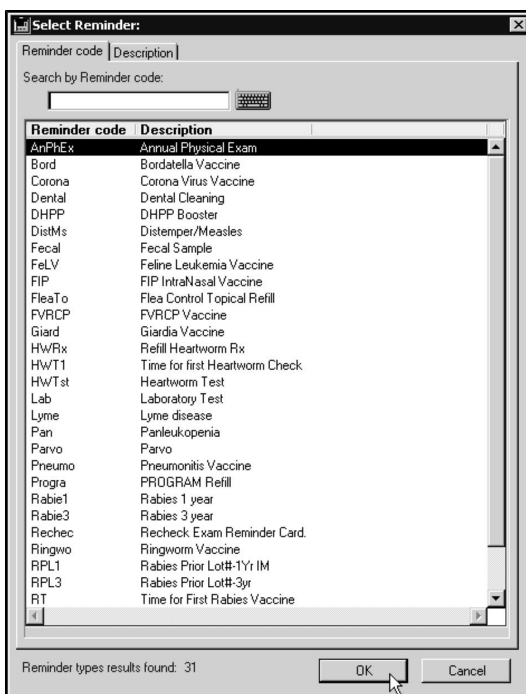
- Click **OK** to save the changed default Species Reminder.

Deleting a Default Species Reminder

You can delete a default Species Reminder at any time from the Species record. To delete a default Species Reminder:

- From the **Default Reminders** list, double-click the Reminder you wish to change.

-OR-
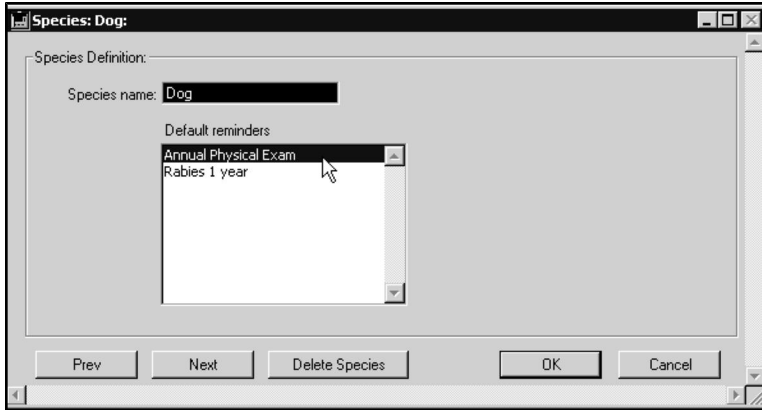
- Click to select the Reminder you wish to modify in the **Default Reminders** list, and then choose **Modify Default Reminder** from the **Species** drop-down menu.
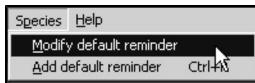
- The **Modify Default Reminder** dialog displays.
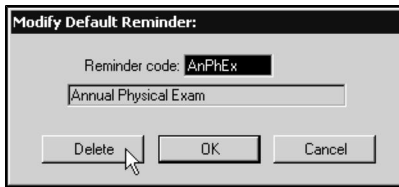
- Click **Delete**. DVMAX closes the **Modify Default Reminder** dialog closes returns you to the Species record.

Deleting a Species Record

To delete a single Species from DVMAX:

- Find and open the Species you wish to delete. See **Searching for a Species Record.**
- Click **Delete** at the bottom of the Species window.
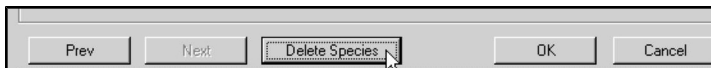
- DVMAX will ask you to confirm that you want to delete the Species.
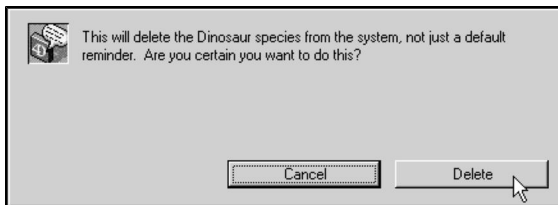
- Click **Delete**. DVMAX will ask you two times to confirm that you wish to delete the species.
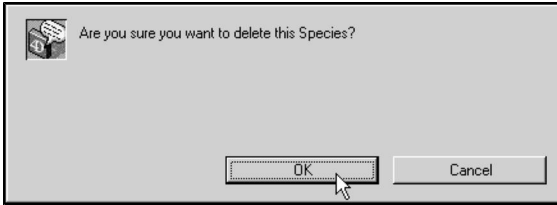
- Click **OK** on each dialog to delete the species.
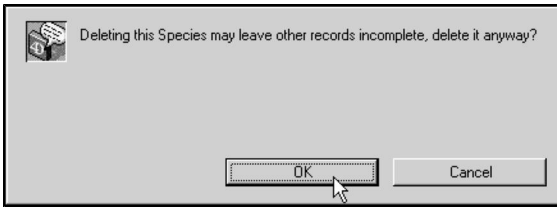
To delete multiple Species from DVMAX:

- List all Species (see **Listing All Species**).

- Click to select the Species you wish to delete.

- Choose **Delete Records** from the **Species** menu.

- DVMAX will ask you to confirm that you want to delete the Species.
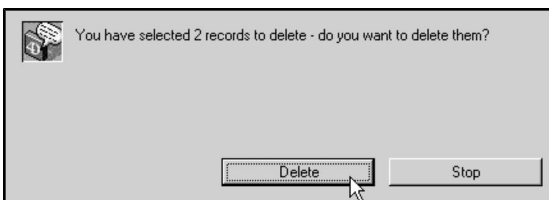
- Click **Delete**.

Staff Records

DVMAX uses Staff records to identify the doctors and/or providers in the practice and make them available for associating with MREs, invoices, Departments, the messaging facility (introduced in DVMAX v8.7) and more. Staff records are NOT the same as Appointment Staff records. Appointment Staff are defined under Setup from Appointments.

Viewing All Staff Records

To see a list of all Staff records:

- Choose **Patient Codes** from the **Section** drop-down menu on the DVMAX main screen.

- The **Find** window opens. Select **Staff** from the **Search For** drop-down list.

- Click **All Records**.

- A list of all **Staff** records displays.

Finding a Staff Record

To find an existing Staff Record:

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

- The **Find** window opens.

- Select **Staff** from the **Search For** drop-down list.
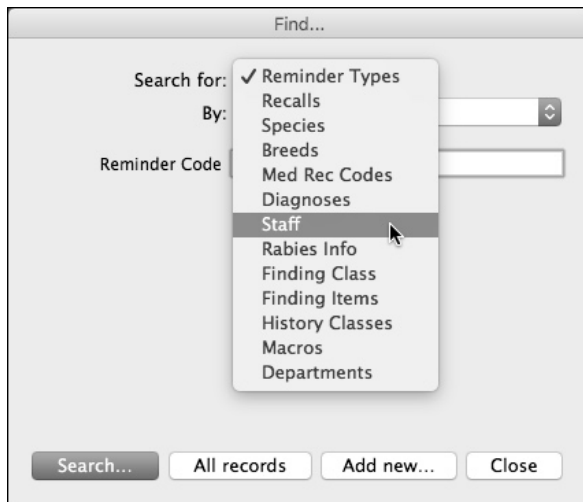
- From the **By** drop-down list, choose **Staff Code**, **Staff Name** or **General**

- **Staff Code** will search all Staff Codes matching the code you type. **Staff Name** will locate all Staff names matching the text you type. **General** lets you run a custom search. See the chapter on **General Searches** for more information.

- Type a **Staff Code** or **Staff Name** into the box below the **By** drop-down list. If you do not know a complete code or are unsure of the spelling of a staff name, type as much as you know.

- Click **Search**. If there are multiple records matching your search criteria, DVMAX will present them in a list. To view a Staff record, double click it.

- If there is a single match for your search criteria, DVMAX will open the record.

- From the Staff record you can view Staff details, including Staff Client records.

- If there are no matches for your search, DVMAX will present an Alert dialog indicating no matching records were found.

- Click **OK** in this dialog to return to the **Find** window and search again.

Creating a New Staff Record

To create a new Staff Record:

- From the **Section** drop down menu, select **Patient Codes**.

- From the **Find** dialog, select **Staff** from the **Search For** menu.

- Select **Add New** to create a new Staff record. A new Staff record dialog opens. Alternatively, click **Add New** from the **Staff** menu on the menu bar at the top of the DVMAX main screen.

- Type a unique code for this Staff in the **Staff Code** field. DVMAX will use the code you type to identify the Staff by code. **Staff codes can be no longer than 6 characters**.

- Type the full name for the staff in the Staff Name field.

- Type a shorter staff name in the Staff List Name. By default, DVMAX uses the **Staff Code** for the **Staff List Name**. You will see the **Staff Code** along with **Staff List Name** on any menu on which staff are listed, such as Provider from an MRE.

- If your practice uses the Departments feature, select the department with which you want to associate the staff member. This selection will be used by default but can be adjusted manually in areas of DVMAX that use Departments, such as invoices or MREs. The default department selection is clinic name.

- If your clinic uses Antech, enter code name (such as staff initials, for example) in the **Antech Barcode Name** field.

- Where applicable, enter doctor license number in the **License #** field.

- In the **Sort Order** field, type a numeric value to identify the order in which you would like the staff name to appear on any staff lists presented in DVMAX. DVMAX presents staff with the lowest sort order code first, so the lower the number, the higher up on the list the staff name will appear. For example, a staff with a code of "0" will be at the top of the list. More than one staff may use the same Sort Order value.

- If this staff is a doctor, select the **Doctor** checkbox. You may select both Doctor and Provider.

- If this staff is a service provider in the clinic, select the **Provider** checkbox. You may select both Doctor and Provider.

- If this staff is active, leave the **Inactive** checkbox blank. If the staff is inactive, select **Inactive**. Staff marked as inactive will not appear on any provider lists, such as those associated with invoices or MREs.

- If you want this staff to use DVMAX Messenger, the internal message board facility, select **Use Messenger**.

- The **Staff Client Records** area identifies clients who are able to receive lab requisition discounts through this staff. Any clients linked to staff for this purpose will be shown in the associated Staff Client Record list area of the Staff record. You create the staff-client link from the client record. See **Creating Staff Client Records** for more information.

- If this staff is using Messenger, select a message color for the staff from the Color drop down menu.

ℹ️ Note: You cannot add or edit a **Staff Client Record** in the Staff Record. The link must be made from the Client record.

Modifying or Editing a Staff Record

You can edit any field on the Staff record except Staff Code and Staff Client Records.

To edit a Staff record:

- From the **Section** menu, select **Patient Codes**.

- From the **Find** dialog, select **Staff** from the **Search For** menu.

- Use the search features to identify the record you wish to modify or select **All Records** to see a list of all Staff records and then select the record you want to modify from the list presented.

- From the Staff record, make the required changes and select **OK**.

Note: You cannot edit Staff Code. You cannot edit a **Staff Client Record** in the Staff Record window. The link must be edited from the Client record.

Deleting a Staff Record

To delete a Staff record:

- Locate and open the Staff record you wish to delete by following the procedure outlined in **Finding a Staff Record**.

- Click **Delete** at the bottom of the Staff record dialog. DVMAX will ask you to confirm that you wish to delete this record.
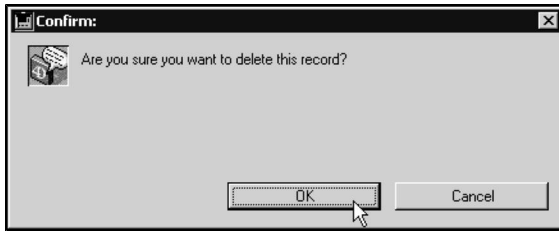
- Click **OK**. DVMAX will warn you that deleting this record may affect other parts of the system.
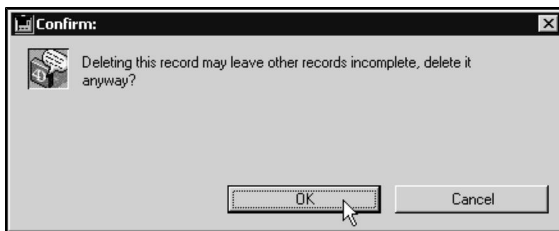
- If you are sure you wish to delete the Staff record, click **OK**. Otherwise, click **Cancel** to leave the Staff record intact.

Deleting Multiple Staff Records

To delete multiple Staff records, you must be viewing a list of Staff records from which you can then make a selection. To view a list of Staff records, follow the procedure outlined in **Finding a Staff Record** or **Viewing All Staff Records**.

To delete multiple records from the Staff records list:

- From the records list, click to select the Staff records you wish to delete. Press the SHIFT key while clicking to select multiple adjacent lines. Press the CON-TROL key (COMMAND on Macintosh) while clicking to select lines that are not adjacent.

- Choose **Delete Records** from the **Staff** drop-down menu at the top of your screen.
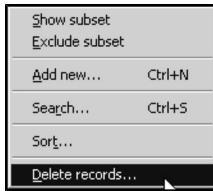
- DVMAX will ask you to confirm that you wish to proceed.

- Click **Delete**. DVMAX will warn you that the delete action is permanent.
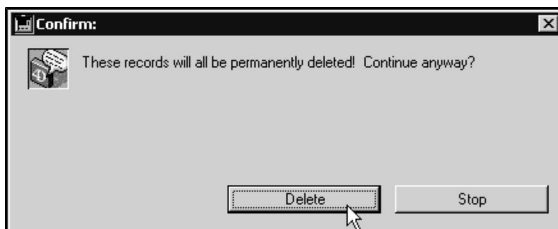
- If you are sure you wish to proceed, click **Delete**. Otherwise, click **Stop**.

Creating a Staff Client Record

The Client Staff Record setting allows DVMAX to identify if a Client is able to receive Lab requisition discounts. The setting creates a link to a current Staff record and adds the Client name to that Staff record. Only Clients with this Staff link will be able to receive discounts on requisition billing.

To add a Client to a Staff Record:

- Open the appropriate **Client** record.

- Click the **Finances** tab.

- From the **Other information** area of the **Finances** tab, click the **Staff Client Record** box. Once the box is clicked, you will be able to select a Staff member and create the Client/Staff link.

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- Select **OK** to save your changes. The linked Client will now display under the **Staff Client Record** list of the Staff record.
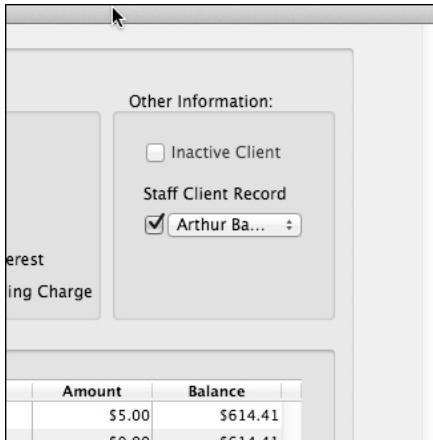
System Constants and Preferences

System Constants, as the name implies, are settings that apply to DVMAX system-wide. Note that all other stations must restart for changes to take effect. To access System Constants:

- From the **Section** drop down menu, select **System Constants**.

Main Constants

The **System Constants** window opens to the **Main Constants** tab.

Data Audit Information

You cannot change information in the **Data Audit Information** area of the **Main Constants** tab. Values reflect the last assigned number for each item: **Last Client ID**, **Last Invoice #**, **Last Transaction #**, **Last Appt #**, **Last Patient ID**, **Last Purchase #**, **Last Rx#**, **Last Appt Staff #**.

Financial Reporting

Select **Prompt to Print or Export Financial Reports** to ask the user whether they would like to print or export reports to a **.txt** file (which can then be opened in a spreadsheet).

Backup Alerting

Use the **Backup** section to configure your automatic system backup notification. You can display an alert on the screen or send an email to an assigned email address if the back up fails.

Client Backup Alerting

If this setting is on and a backup fails, an Alert will appear under the Command Palette. When Backup is **Off**, click **Start** to enable backup alerts. To disable alerts, click **Stop** when Client Backup is **On**.

Backup Alert Email Address

Type an email address in the **Backup Alert Email Address** field if you would like DVMAX to send a **Client Backup Alert** email to the specified email address if the DVMAX backup fails.

Backup Alert Interval (Days)

Enter an interval, with value in days, for how often you would like DVMAX to check the status of the backup.

Restore Backup Datafile

To restore your DVMAX system from a saved (Backup) datafile, click **Restore** and select the datafile to use for the restore. Contact DVMAX Technical Support if you have questions or concerns prior to running the Restore.

Spelling Setup

Click **Spell Setup** to open the dictionary editor. Add, edit and delete words or import words from another dictionary using Spelling Setup.

Default Constants

To access Default Constants settings:

- From the **Section** menu, select **System Constants**.
- Click the **Default Constants** tab.

Location Preferences

- **Default City** –This sets the default city that will be used in a new Client record under the Contact Info area.

- **Default State** – This sets the default State that will be used in a new Client record under the Contact Info area.

- **Default Zip Code** - This sets the default zip code that will be used in a new Client record under the Contact Info area.

- **Default Doctor** – You can assign a default Doctor for History entries. This setting controls the Dr. or Provider initially selected in the **Choose a Primary Provider** dialog that appears, for example, when you start a new invoice. Click the Magnifying Glass to access a pick list of doctors.

- **Clear Doctor** - Click **Clear Dr.** to remove the Default doctor. Click the **Magnifying Glass** icon to open a pick list of doctors.

- **Site Code** - If you have a multi-practice application, each site has its own three letter code that is shown here.

Practice Preferences

This is where you define the name, address, and phone number of your practice, as it is to appear on Invoices and correspondence. You can also set the language for the program (English or Finnish).

ℹ️ Zip lookups are supported when the country is specified as US, Canada or Finland in System Constants.

⚠️ It is recommended you do not alter information in **Currency Format** field. Should you require assistance, please call Technical Support.

Inserting a Clinic Logo (System Constants)

You can add your clinic logo in the **Clinic Logo** field in the **Default Constants** tab of System Constants. This logo will appear on printed invoices, estimates and similar documents.

To place a clinic logo in the Clinic Logo field:

- Open your clinic logo in a preview or other application where the logo can be viewed, and from that application, click to highlight your logo and then click
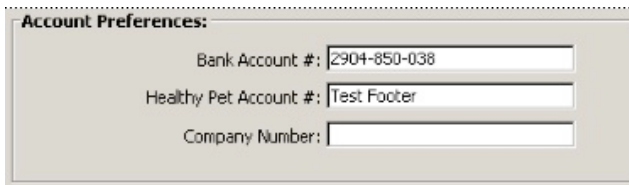
Copy from the **Edit** menu.

- Go to DVMAX.

- From the DVMAX main screen, select **System Constants** from the **Section** menu.

- Select the **Default Constants** tab.

- Click in the **Clinic Logo** field.

- From the DVMAX **Edit** menu, select **Paste**.

- The logo will be inserted in the **Clinic Logo** field.

⚠ The image size must be 100 pixels x 100 pixels. It will print out in the top left corner of invoices, estimates, and returns, etc., at a size of 1" x 1". Larger images inserted in the Logo field will be scaled to fit.

Account Preferences

Use this section to enter your business account preferences.
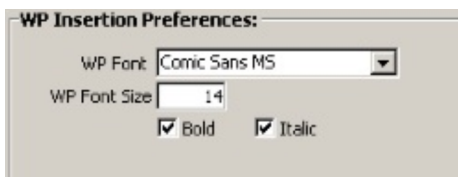
Bank Account - Enter your bank account number to be used with deposit slips in the **End of Day** report.

Healthy Pet Account - If you use a Healthy Pet Account for your reminders, enter the account number.

Company Number - This is typically used in countries outside Canada and the USA, and is printed on the invoice and payment stubs for use with electronic payments.

WP Insertion Preferences

Use the **WP Insertion Preferences** section to set a default font, size, and style (bold, italics) for inserting MREs or Findings into WP documents. These preferences are used if the linked MRCs/Finding Codes have no formatting information specified.

Client and Patient Settings

The **Client and Patients** tab in **System Constants** is used for settings that apply to a number of client- or patient-specific constants, including some patient History preferences. To access the **Client and Patients** tab:

- From the **Section** menu, click **System Constants**.
- From **System Constants**, click the **Client & Patient Settings** tab.

Client Preferences

For Client Number, Display

When displaying a list of clients, this setting will either display the client's ID number or file number based on what you select here. This number is displayed on invoices, statements, and reports. Refer to **Searching For Client Records** in the **Client Records** chapter for more information.

Delayed Interest Default

Having this setting turned on will delay interest until billed for all new clients. Refer to **Setting Billing Options for a Client** under **Client Records** for more information.

Allow Referrals by Other Clients

Having this setting turned on will allow you to list another client of your practice as a referral source for new clients and patients. Refer to **Setting a Client's Referral Source** in the **Client Records** chapter, and **Setting a Patient's Referral Source** in the **Patient Records** chapter for more information.

Quicker Client Entry

Enable this setting to allow you to enter multiple clients quickly, one after the other. DVMAX will bring up a new client record as soon as you click **OK** on the previous client screen, or as soon as you click **OK & Next Client** on a patient screen. Refer to **System Constants That Affect the Client Record** in the **Client Records** chapter for more information.

Set Visit Reasons

The Set Visit Reasons area of System Constants allows you to Add, Delete or edit visit reason records. The Visit Reasons list is displayed when you Check In an appointment from the Scheduler. The Scheduler's Check In functionality requires that you select a visit reason.

To Add or Edit Visit Reasons:

- From the Client Preferences area of the Client and Patient Settings tab of System Constants, click **Set Visit Reasons**.
- Click **Add** to create a new Visit Reason. The reason name will default to "Reason (number)". Edit the reason name as needed,
- Select a reason and click **Delete** to remove a visit reason from the list. From the confirm dialog, click **OK** to continue and delete the reason, or **Cancel** to go back to the Reasons list.
- To edit a visit reason, click to select the reason, then click the reason name field. Edit the name as preferred.

ⓘ Further detail on this feature, which has been introduced with DVMAX 7.6, will be provided as soon as the remaining functionalities are enabled. At present, Set In Hospital and Set Reminder Compliance actions are not linked to Visit Reasons.

⚠ Deleting or editing visit reason records may leave other records incomplete.

Patient Preferences

Use Species Specific Breeds

Enable this setting to only allow you to enter a breed that exists under the species selected when you enter a new patient.

Start in Name Field

Enable this setting to place the cursor in the **Name** field on the patient's General Information tab when entering a new patient.

Suppress Rabies # Request

Enable this setting to prevent DVMAX from asking you to enter the rabies tag number when putting a rabies vaccine onto a patient's record. If enabled, you can manually enter a rabies tag number on a patient's record if needed. To have DVMAX automatically ask for a rabies tag number, refer to the chapter **Rabies Information Records**.

Add Year to Rabies Tag Numbers

Enable this setting to add the current year to the end of an assigned rabies tag number.

Add Stables via Patient Screen

Enable this setting to allow you to enter a new stable directly from the patient's record.

Add Trainers via Patient Screen

Enable this setting to allow you to enter a new trainer directly from the patient's record.

Add Referrals via Patient and Client Screen

Enable this setting to enter a new referral source directly from the patient's record. For more information, refer to **Creating a New Referral Source Record** in the **Referral Source Records** chapter.

Canine Name

Type the word Canine and this will activate the BSA button for any patient marked as a canine.

Feline Name

Type the word Feline and this will activate the BSA button for any patient marked as a feline.

Rx Label Copies

Type the default number of Rx labels to print. You can still change the number of labels to print before printing a Rx label.

Include Dates

With WP reminders, select to include the due dates when pulling reminders into a word processing documents. With WP history, select to include the date of each entry when pulling history entries into a word processing document.

Default Weight Measure

This is the default weight measure for all new patients. However, the weight measure can be changed on a patient's record if the default measure is not the desired measure.

VetEd CSV Path

Sets the VetEd CSV path. This field is only labeled when running DVMAX under a Windows environment, not Macintosh.

History Preferences

Display and Print History Entries

Select **Oldest entry first** to display and print a patient's history with the oldest entry first, in chronological order, or select **Most recent days first** to display and print a patient's history with the most recent entry first, in reverse chronological order.

Suppress Blank Findings from Text View

Enable this setting to suppress any blank finding item when viewing a patient's history in text view, when printing the patient's history, and when pulling history entries into a word processing document.

Include Time on Patient History Printout

Enable this setting to print the time each entry was entered into the patient's record when the history is printed.

Limit Printed History Length

Enable this setting to limit the patient's history when printed

Limit To

Type a number of entries and select **Limit by Count** to limit the patient's history to a set number of entries when printed. Type a number of days and select **Limit by Date** to limit the printed history to a set number of days back from the current or selected date.

Web History Preferences

When allowing referring veterinarians to log into your system to see their patients' records, you can limit the number of days of history they can view. Type the number of days of history in the **# of days to display** field. For more information, refer to **Web Patient Reporting**.

Default Notes (Rabies Certificate, Health Certificate and Billing)

Default notes included with the Rabies Certificate, Health Certificate and Billing Statement are written here. Different formats for the Rabies Certificate can be chosen from the **Rabies Certificate** format drop-down menu above the **Rabies Certificate Note** field on the right side. Type the default note, or paste the note from another document, into the appropriate note area. Use the **Spell Check** button to check the spelling of your note before you save.

Finance Constants

The **Finance Constants** tab under **System Constants** includes options for financial settings such as annual finance rate, sales tax rates and some receivables aging options.

Finance Constants Billing Options

Finance Rate (Annual)

This is the percent interest or finance rate that you will charge for unpaid balances.

Billing Grace Period

Specify the amount of days from the date of the invoice that you will begin charging the finance rate (if you enter 30 in this field, the system does not begin charging finance rate until the balance is 30 days old).

Billing Charge

This is a fee that you might charge (in place of, or in addition to the finance rate). The reasoning for this charge is that if you need to send a statement to a client due to an unpaid balance, you need to pay someone to print it out, put it in an envelope, pay for postage, etc.

Minimum Billing Balance

This is the least amount that you are willing to send a statement for. Some hospitals don't think it is worth the time and postage to send a statement if someone only owes $2.00, for example. Enter the minimum dollar amount in this field. A common entry here is $5.00.

Billing Charge During Grace Period

This setting allows you to choose if you want to charge the billing charge even during the billing grace period. For example, if the unpaid balance is only 10 days old and the billing grace period is 30 days, they would be charged the billing charge, but not the finance rate. Select this setting to charge the billing charge during the grace period. Clear this setting to prevent charging the billing charge until after the grace period.

Detailed Billing for All Clients

This setting allows you to choose if you would like detailed statements to print for all clients with a balance. A detailed billing statement differs from a regular statement in that it contains simplified copies of recently unpaid invoices on the statement. The regular statement only shows the invoice number, the patient on the invoice, and the total of the invoice. There is a setting on each client record to allow you to print detailed billing statements for that client.

Default Payment Due Delay

This setting only applies if the **Practice Language** Preferences in **System Constants** is set to a language other than English. This setting is used as the basis of a due date calculation for some non-English invoices. See **Multi-language Support** for more information on this setting.

Management Reports

Use Fast Sales Reporting

This setting will allow reports such as the Detailed Sales Report to calculate quicker.

Sales Tax Rate

This area contains tax rate(s) used when calculating tax on invoices and estimates. To add a tax rate, double click in the **Sales Tax Rate** field, or click on the **Sales Tax** menu at the top of the screen and choose **Add New**. To modify a tax rate, double-click the appropriate tax rate. Generally, in the US there should only be one tax rate listed.

⚠️ Tax rates are stored in a separate table.

Receivables Aging Options for Backdated Invoices

This setting controls whether the default **Receivable Aging Date** for backdated invoices remains at the current date or is changed to the new date on the invoice. Select

Date Invoice Entered if you would like backdated invoices to use the date the invoice was entered or choose **Date Service Performed** if you would like to use the date the service was performed.
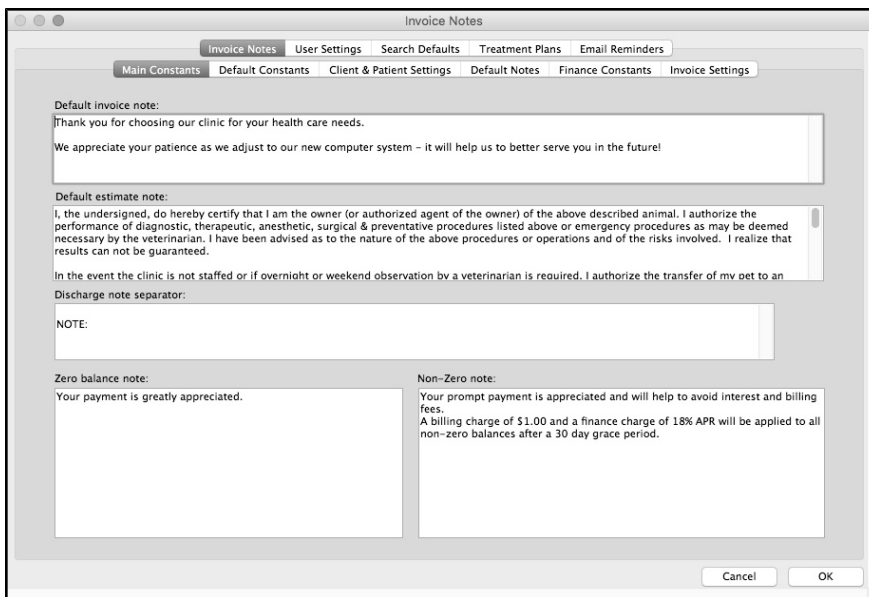
General Ledger

Contact DVMAX Technical Support for details on using the settings under General Ledger (**Force Use of GL Accounts** and **GL Reporting Dept**).

Invoice Notes

Use the Invoice Notes constants in this section to determine how your Invoice Notes appear.

⚠️ Zero and Non-Zero Balance Notes will only display the first 2 lines on a printed invoice, although you can type more text if desired.

Default Invoice Note: This note will appear at the bottom of every invoice, in the **Discharge Notes** field of the invoice. Many hospitals change this note for different times of the year (heartworm month, dental month, holiday notes).

Default Estimate Note: This note appears at the bottom of every estimate. This is usually an estimate "disclaimer" that reminds clients that this is just an estimate and the possible risks involved, and so on. Most hospitals also include a line for the client to sign approving the estimate.

Discharge Note Separator: The text that will appear before each discharge note on an invoice. Contents of this field separate multiple bill item notes on the bottom of an invoice.

ⓘ Some hospitals choose to insert a few carriage returns (<Enter> key) and then type the text "***PLEASE NOTE". This will separate each note with some empty lines and then begin each note with ***PLEASE NOTE.

Zero Balance Note: This note appears at the bottom of any invoice that has a zero balance. This means that the invoice was paid in full. It is generally used to thank the owner for prompt payment. You may elect to leave this field blank. Only the first 2 lines of text will show on a printed invoice.

Non-Zero Note: This note will appear at the bottom of any invoice that does not have a zero balance, that is, the invoice was not paid in full, or if they had a previous balance. This is generally used to state the interest rate for unpaid balances. You may elect to leave this field blank. Only the first 2 lines of text will show on a printed invoice.

Invoice Settings

Use constants on the **Invoice Settings** tab to specify how your practice would like to format invoices.
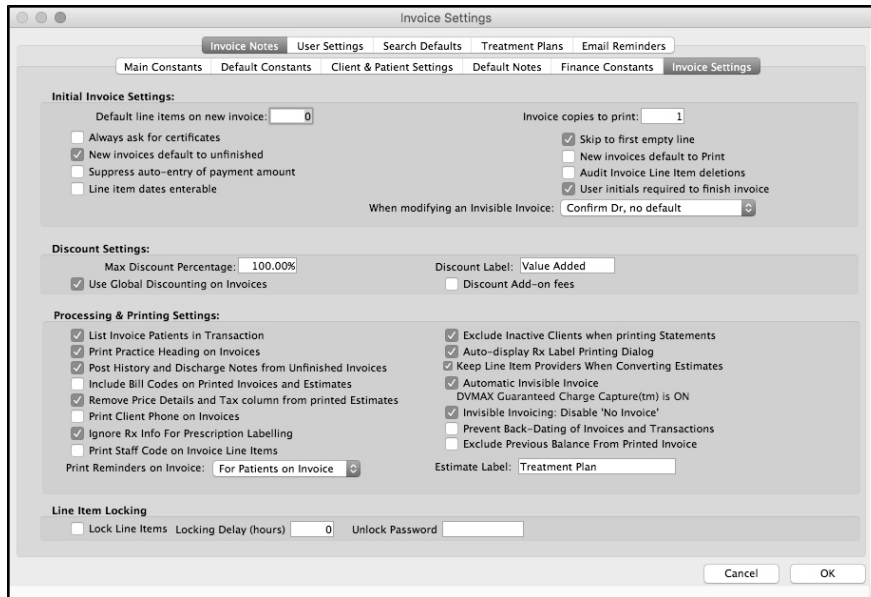
Initial Invoice Settings

Use the **Initial Invoice Settings** section to specify the properties of a new invoice. For more information, refer to **Invoicing, System Constants That Affect Invoicing**. See also the **Assorted Preferences** tab (from the **File** menu, select **Preferences**), and refer to **Assorted Prefs** in this chapter.

Default Line Items on a New Invoice: Set the number of empty line items that appear on a new invoice.

Always Ask For Certificates: Select **Always Ask for Certificates** to cause the **Certificates** dialog to appear every time you finish an invoice. This allows for easy certificate printing after every invoice. Most often, you will leave this setting cleared because the **Certificates** setting in appropriate Bill Items is a more efficient way to handle certificate printing (for more information, see the **Bill Items** chapter of this manual).

New Invoices Default To Unfinished: This setting controls whether the **Finished** check box is selected or not when you create a new invoice in DVMAX. If you want new invoices to default to unfinished, select this checkbox, otherwise leave the checkbox blank and invoices will default to Finished (the **Finished** checkbox on a new invoice will be selected by default).

Suppress Auto Entry Of Payment Amount: This setting tells DVMAX whether to automatically fill in the client's balance in the **Payment Amount** box when accepting a payment. If selected, the client balance will NOT appear in the **Payment Amount** field when taking a payment.

Line Item Dates Enterable: This setting tells DVMAX to allow you to enter the dates for line items directly on the line items themselves while creating the invoice. This setting is particularly useful for practices that enter invoice information after the fact (for example, field visits and hospitalized patients).

Invoice Copies To Print: In the **Invoice Copies to Print** field, type how many copies of an invoice will be printed when you click Print from the open invoice.

Skip to First Empty Line: This setting determines whether DVMAX places the cursor in the **Qty** field of the first empty line item when re-opening an unfinished invoice or the first line item of that invoice.

New Invoices Default to Print: This setting controls whether the **Print** check box is selected or not when you create a new invoice.

Audit Invoice Line Item Deletions: This setting controls DVMAX's behavior when deleting line items. If this setting is disabled, line items when deleted will simply disappear from the invoice. If enabled, DVMAX records the **Date**, **Time**, **User**, **Station**, **Invoice number** and line item details in a **Deletion Log** (General Management).

User Initials Required to Finish Invoice: This setting determines whether DVMAX requires the user to type their initials when an invoice is finished. If you select this setting, users will be prompted to type their initials before an invoice can be finished and saved.

When Modifying an Invisible Invoice: If this constant is selected, then when you switch between patients using the **Next/Previous** buttons, and there is an invisible invoice running, DVMAX will ask for the Dr. on each switch, and will use that Dr. as the default value for invoice line items, and for MRE entries. There are three possible options:

- **Confirm Doctor With Default -** When you switch between patients using the **Next/Previous** buttons, and there is an invisible invoice running, DVMAX will ask for the Dr. on each switch, but the Dr. listed in **System Constants** under **Default Settings** will be the default Dr. that appears when the box comes up. DVMAX will then use that Dr. as the default value for invoice line items, and for MRE entries.

- **Do Not Confirm Doctor -** When you switch between patients using the **Next/Previous** buttons, and there is an invisible invoice running, DVMAX will NOT ask for the Dr. on each switch. DVMAX will use the doctor listed on the previously started invisible invoice.

- **Confirm Doctor Without Default -** When you switch between patients using the **Next/Previous** buttons, and there is an invisible invoice running,

DVMAX will ask for the Dr. on each switch, and you will be forced to choose a specific doctor.

Discount Settings

Use this section to define the discount percentages for your practice, where applicable.

Max Discount Percentage: This percentage is the maximum discount that can be applied to any item on an invoice. If no number is specified, the maximum discount is 0%, that is, no discount can be applied on an invoice.

Use Global Discounting on Invoices: This setting determines if the **Discount All Items** radio button is available. Enable this setting to allow discounting of all items on an invoice. For more information, refer to **Applying a Discount to All Line Items** in the **Estimates** chapter of the DVMAX manual.

Discount Label: The text entered in this setting will appear on the printed invoice beside the discount amount. The default text is **discount**.

Discount Add-On Fees: This setting tells DVMAX whether to apply a discount to the **Add-on** amount defined for a Bill Item. This gives you the option of always charging the full Add-on for every item, or discounting the add-on fee along with the price of the item itself.

Processing and Printing Settings

For more information on invoicing settings, refer to **Invoicing, System Constants That Affect Invoicing**.

List Invoice Patients in Transaction: Enable this setting to include patient names in the record of an invoice transaction. This is the recommended setting.

Print Practice Heading On Invoice: If enabled, DVMAX will print your practice's name and address at the top of invoices.

Post History and Discharge Notes From Unfinished Invoices: This setting determines when DVMAX transfers (or posts) a line item on an invoice to a patient's history. If enabled (checkbox is selected), DVMAX will post from an invoice to a patient's history, regardless of whether

Finished is selected on the invoice.   If not selected, DVMAX will wait until you mark the invoice as **Finished** before transferring a line item to the patient's history.

Include Bill Codes on Printed Invoices and Estimates: Enable this setting to print Bill Codes as part of the description of line items on an invoice.

Remove Price Details and Tax Column from Printed Estimates: Enable this setting to make it easier for clients to read a printed estimate, by removing the **Lo Price**, **Hi Price** and **Tax** columns from the estimate.

Print Client Phone on Invoices: Enable this setting to print the client's phone number on invoices.

Ignore Rx Info for Prescription Labeling: This setting tells DVMAX whether to notify you when you try to print a prescription label from an invoice for a Bill Item that is out of stock. If enabled, the system will use whatever lot information is on hand, or proceed with the prescription labeling even if there is not enough in existing lots to fill the current prescription or refill.

Print Staff Code on Invoice Line Items: This setting controls whether the staff codes on an invoice's line items appear on the line items on the printed invoice.

Print Reminders on Invoice: This setting controls which Reminders, if any, are printed on invoices.

- **Never** - No reminders will be printed on invoices
- **Patients on Invoice** - Only reminders for patients that appear on the Invoice will be printed.
- **For All Clients' Patients** - All reminders for all patients for the invoiced client will be printed. This is the default setting.

Exclude Inactive Clients when Printing Statements: This setting controls whether DVMAX will include clients marked as **Inactive** when printing statements (from **General Management**). If selected, Inactive clients are not included in statements.

Auto Display Rx Label Printing Dialog: If this setting is enabled, DVMAX will automatically display the Prescription Labeling dialog after you enter a prescription item on an invoice line, or when you add it as an MRE in patient history. Selecting this setting eliminates the need to use the **Prescription label** button on the **Invoice** screen.

Keep Line Item Providers When Converting Estimates: If this setting is selected, line items on the invoice's **Staff** field will contain the same values as on the originating Estimate. If this setting is cleared, DVMAX will force each line item's **Staff** box to contain the **Default Provider** from the Estimate.

Automatic Invisible Invoice: This setting controls whether DVMAX automatically opens an Invisible Invoice when you open the **Patient History** screen. A **Confirm** dialog opens asking if you want to enable DVMAX Guaranteed Charge Capture. Click **Yes**.

Invisible Invoicing: Disable "No Invoice": If this setting is on, DVMAX will not present a "No Invoice" option when asking for a Primary Provider or other information before opening an invisible invoice.

Prevent back Dating of Invoices and Transactions: This setting prevents the user from entering dates before the current date on invoices and new transactions, and even when editing invoices (if the payments are entered again). If you select **Prevent Back-Dating of Invoices and Transactions**, DVMAX implements the following behaviors in regard to invoices and transactions:

- On new invoices, the **Date** field is prevented from being set to a date before the current date. This restriction is also true for the **Aging Date** field.

- When an invoice is backdated, the date is automatically forced to the current date, but the line items are set to the back-dated value that the user entered.

- New transactions are prevented from being set to a date before the current date.

- When editing an invoice, if payments are not kept with the new invoice, DVMAX will generate new receivables and transaction records. These are constrained to the current date. As well, on the newly created invoice, the **Invoice Date** and **Invoice Aging Date** are constrained to the current date. The invoice line items on the newly created invoice do **not** have their dates constrained.

Exclude Previous balance from Printed Invoice: Selecting **Exclude Previous Balance from Printed Invoice** allows a clinic to remove the **Previous Balance** box and label from a printed invoice.

Estimate Label: In cases when a clinic decides that the term "Estimate" does not accurately represent the service being offered, the label can be changed to better reflect the service offered.

Line Item Locking (System Constants)

Lock Line Items: Locking Line Items means that when an item is placed on an invoice it is not able to be altered in any way, or deleted. Check this box if you would like to take advantage of this feature.

Lock Delay Hours: Set a time limit for the line items to be modified before they become locked.

Unlock Password: Enter a password that can be used to "Unlock" the line item if necessary

User Settings

OTC Staff

OTC staff code: Enter the staff code that you have set up for an over-the-counter sale in the staff section. Most likely it will be OTC.

Clear OTC: This will clear the OTC staff that you have selected.

User Defined Fields

User Defined Client Label 1: Use this label to define this field's contents on the client **General Information** screen.

User Defined Client Label 2: Use this label to define this field's contents on the client **General Information** screen.

User Defined Patient Label 1: Use this label to define this field's contents on the patient **General Information** screen.

Statement Settings

Top of Page Gap: Enter the number of spaces left at the top of the page before starting to print a statement.

Between Addrs Gap: Enter the number of spaces between the address of the clinic and the client address.

Push Client Addr: Enter the number of spaces to push the client's address to the right.

Path to Images Folder

Path to Images Folder: This is the path from the workstation to the images folder on the server. Please have your IT technician set this path on each workstation.

Set: Click to select the path created by your IT technician.

Web (System Constants Default Settings)

Web: Enable this setting to allow your referring veterinarians to log in and view their patient's history.

Start Web Server: To use the web-based services, you must start the Web Server, and enter a working port number for the service to use. Refer to **Starting the Web Server** in the **Patient Records** chapter for more information.

Start Web Server Automatically: Select to start the web server automatically whenever DVMAX is restarted. Refer to **Starting the Web Server** in the **Patient Records** chapter for more information.

Faxing

DVMAX lets you to fax documents directly from a patient, client or referral source record. The fax feature requires a special license to use. Contact DVMAX Technical Support for more

information. See also the chapter **Fax Client**.

Fax Server: Displays the fax server and port.

Set: Click **Set** to set the Fax Server and port. Hold down the <Shift> key to enter a remote Fax Server address.

Username: Enter your user name.

Password: Enter your password.

Custom Reports

From time to time, new Custom Reports are added to DVMAX. Use the **Reload from Server** function to update your Reports list.

Reload from server: Click to refresh the list of available custom reports.

Appointments

⚠ As of DVMAX v7.6, you will find Appointment Settings located under **Setup** from the Appointment scheduler. See the chapter, **Appointments**, for more information.

Multiple Card Settings

Top of Page Gap: Enter the number of spaces to leave at the top of the page when printing reminder cards.

Between Cards Gap: Enter the number of spaces between each card when printing reminder cards.

Misc (System Constants)

Pending Refresh Interval: Enter the value in seconds for how often the pending treatments list will update.

Labs: Initials Required: Enable this setting to require users to enter their initials when logging the viewing of a lab result record from the **Labs** list (**Labs** from the Command palette).

Pending Display Hospitalized Patients from Local Site: Enable this setting to only display hospitalized patients, in the **Pending** tab, for the local site. Clear the setting to display hospitalized patients for all sites.

Use Macros: Enable this setting to allow you to use macros. See the **Macros** chapter for more information.

Datafile Label

Datafile Label: This is the name of your datafile, and the name that will appear in the windows list.

WP History Delimiters

Load WP Logo: To include a logo on your WP documents, load the logo here. Click **Load WP Logo** to import the logo. Check with DVMAX Technical Support before loading your logo to make sure the size of the logo is appropriate, as too large a logo will create display problems.

Clear WP Logo: To clear a previously loaded WP logo, click this button.

Individual History Entries: When displaying history in paragraph form in a word processing document, the characters or text you type here will display at the beginning of each individual history entry within that history class.

Findings Headings: When displaying history in paragraph form in a word processing document, the characters or text you type here will display at the beginning of each finding class section.

Finding Items: When displaying history in paragraph form in a word processing document, the characters or text you type here will display at the beginning of each finding item within the finding class.

DVMAX PACS Link Settings

This is the area where you will set the server information for the DVMAX PACS Link so that it will send information to and from DVMAX. This setting applies **only** if you are using DVMAX with Purview (previously called SecureRAD). Note that DVMAX version 8.7 introduced integration with IDEXX Web PACS. If you are using IDEXX Web PACS, you will **not** use this PACS setting. Contact DVMAX Technical Support for more details.

DVMAX PACS Link server address: Your DVMAX PACS Link server address.

Test PACS Link: Click to test PACS Link server address.

Search Defaults

From the **Search Defaults** tab you can determine what the default **Search By** item will be for a given **Search For** record type on a **Find** dialog. For example, when you select Clients from the DVMAX palette, it brings up a Find dialog that gives you the option to search For Client records and Search By a list of options. Using the **Search Defaults** tab, you can select what Search By item is listed first on the **By** drop down menu.
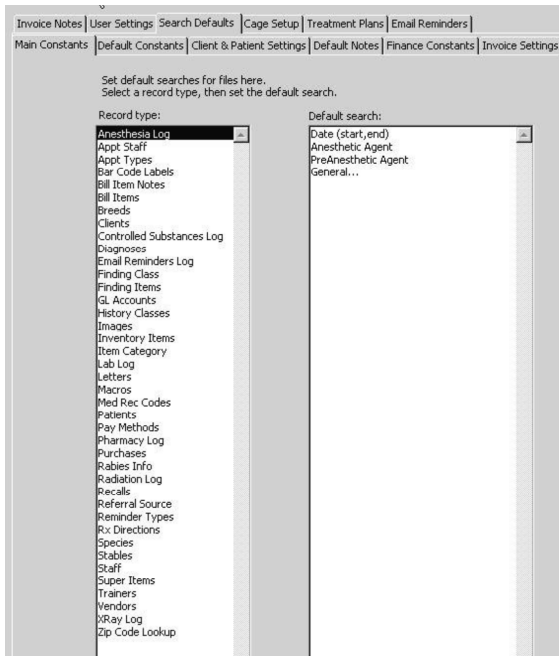
To set the **Default Search** option for a specific **Record Type**:

- From the **Record Type** list box, click to select the record type you want to edit.

- From the **Default Search** list box, click to highlight an item on the list. The high-lighted item will automatically become the default **Search By** option on the **Find** dialog for the associated record type. In other words, it will be listed first on the **Search By** drop down menu for the **Record Type** you are working with,

Cage Setup

⚠ Cage Setup is no longer located under System Constants. As of DVMAX v7.5, you will find Boarding Setup located under **Setup** from the Boarding window. See the chapter, **Boarding**, for more information.

Treatment Plans

You can create Standard Treatment Plans (Saved Treatment Plans) for use when creating individual treatment plans for patients under the **Treatment Plan** tab. Plans already created are listed on the **Treatment Plans** tab in the Standard Treatment Plans area. See the **Treatment Plans** chapter for more information on creating and working with treatment plans.
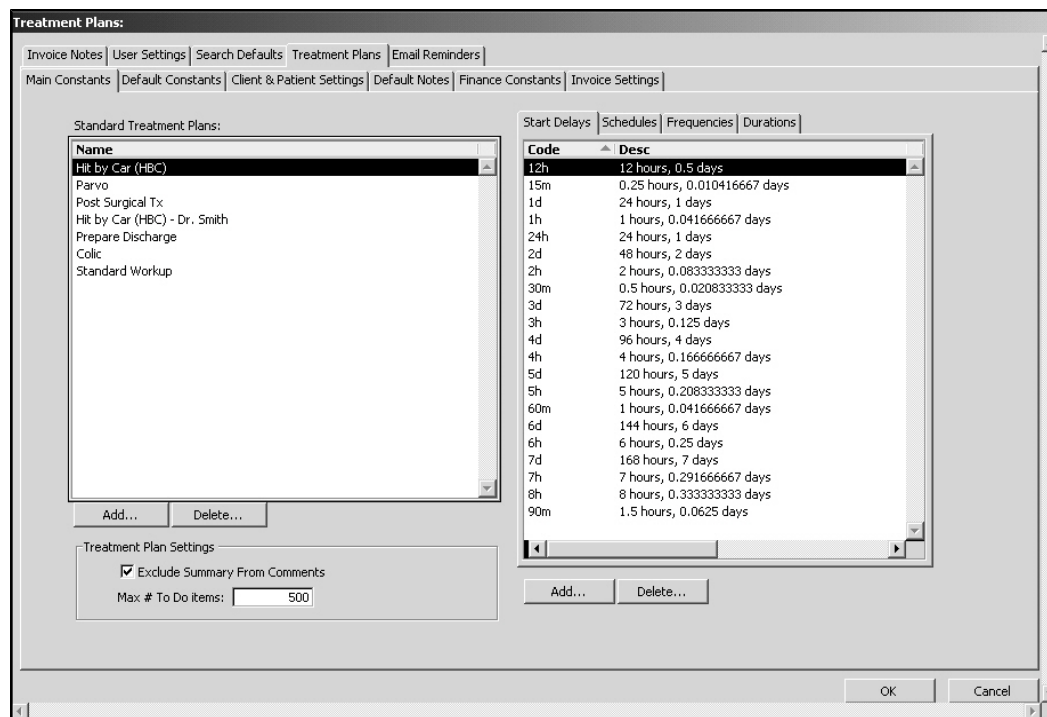
ℹ️ The lists of Treatment Plan codes in System Constants can be sorted by clicking in the column headers.

Adding and Deleting Standard Treatment Plans (in System Constants)

To add a new treatment plan:

- Click **Add** below the **Standard Treatment Plans** box. In the window that displays, assign a name to the treatment plan.

- Click **Add** in the pop up window to add a treatment to the plan.

- Enter the MRC for the treatment you wish to add.

- Enter quantity, units, start delay, frequency, and duration. The **Start Delay**, **Frequency**, and **Duration** are explained below.

- Enter any Notes for the treatment in the **Notes** area.

- Click **OK** to add the treatment to the plan.

- Once all treatments have been added to the plan, click **OK** to save the plan.

To delete an existing plan:

- Highlight the name and click **Delete** below the **Standard Treatment Plans** box.

Treatment Plan Settings

Exclude Summary from Contents: Select to prevent entering a summary of the treatment into the notes section of the associated MRE.

Max # To Do items: Enter the number maximum number of To Do items that can be scheduled on a treatment plan.

Start Delay (Treatment Plan in System Constants)

The **Start Delay** is when you would like the treatment to first begin; 1 hour would be one hour from the current time. See the **Treatment Plans** chapter for more information.

Schedules (Treatment Plan in System Constants)

Schedules gives you the ability to set specific times you would like treatments to be done. When creating a treatment you can use the schedule to assign a time. If you would like a treatment to be done twice a day but not exactly twelve hours apart, this would be what you would use. See the **Treatment Plans** chapter for more information.

Frequencies (Treatment Plan in System Constants)

Frequencies are how often you would like a treatment to be performed; every twelve hours, once a day, etc. See the **Treatment Plans** chapter for more information.

Durations (Treatment Plan in System Constants)

Durations are how long you would like a treatment to be scheduled for; three days, one week, etc. This often will be the length of the patients stay or when a Doctor would like to re-evaluate the treatment plan. See the **Treatment Plans** chapter for more information.

Adding/Deleting Start Delay, Schedules, Frequency or Duration

To add a Start Delay, Frequency or Duration:

- Select the appropriate tab, and click **Add** below the box. A pop up window prompts you for a mnemonic; this is an abbreviation you may use to quickly choose.

- In the **Full Text** field, enter the description of the time length you are creating.

- Enter the length in hours. For example, if you are creating a start delay of one hour, the mnemonic would be 1h, the full test would say one hour, and the # of hours is 1.

- Click **OK**.

To add a Schedule

- Select the **Schedule** tab, and click **Add** below the box.

- In the pop-up window that appears, specify the abbreviation in the **Mnemonic** field.

- Enter a description in the **full text** field.

- There are four time slots; all slots do not have to be used. Leaving a time of 00:00 or 12 am will register as empty. To create a schedule for 8am and 5pm treatment time the mnemonic might be 8/5, the full text would read 8am and 5pm, next to Time 1 would be 08:00:00 and next to Time 2 would be 17:00:00. Enter Times in a 24-hour format.

To delete an item

- Select the appropriate tab, highlight the item, and click **Delete** below the box.

Email Reminders

Use the **Email Reminders** tab to configure your system for using email reminders. The email settings here will also apply to other emailed documents, such as statements delivered via email.
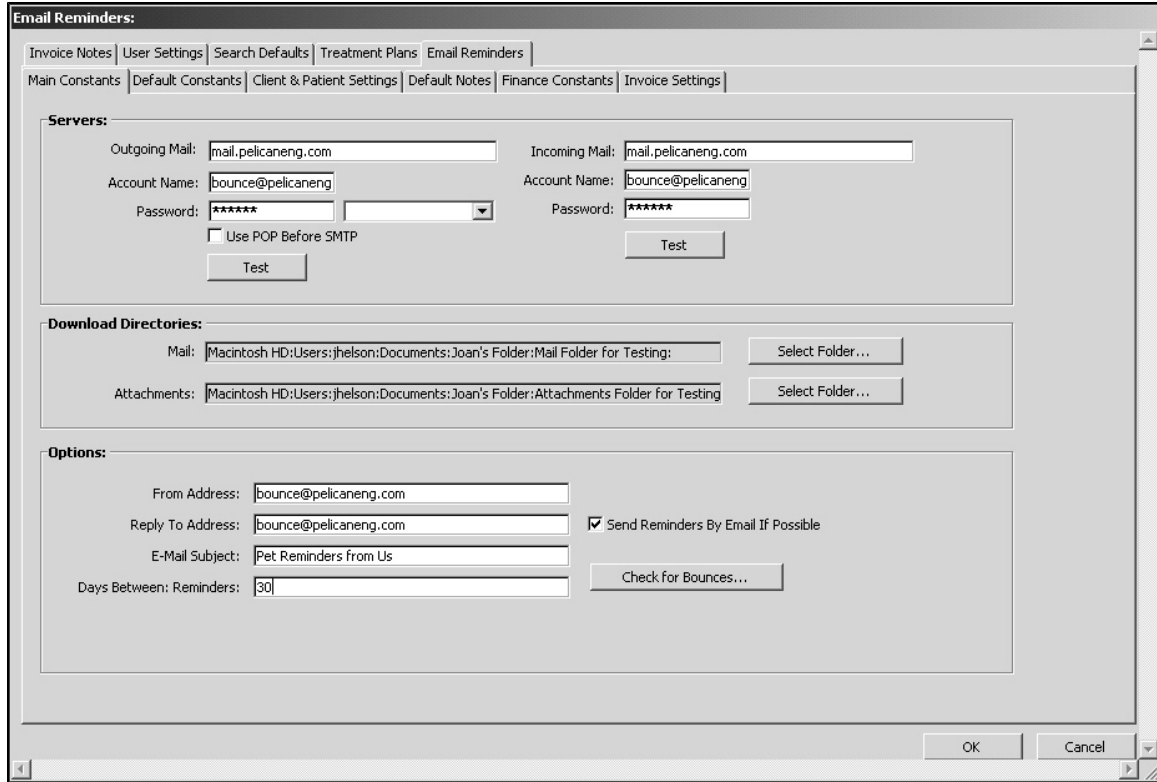
Servers

Refer to **Emailing**, **Sending Email from a Patient Record** and **Setting Up the Email Functionality** for more information.

Outgoing Mail: This is the outgoing mail server (referred to as the SMTP server) that will process the emails being sent from DVMAX.

Account Name: Enter the account name you use to log into your outbound mail server.

Password: Enter the password you use to log into your outbound mail server.

Use POP Before SMTP: Select this setting if your ISP required POP before SMTP. Contact DVMAX Technical Support if you are not sure about your email settings.

Test: Click to test that the email feature is working correctly.

Incoming Mail: Enter the incoming mail server (POP server) to process the emails being received in DVMAX.

Account Name: Enter the account name you use to log into your inbound email server.

Password: Enter the password you use to log into your inbound email server.

Test: Click to test that the email feature is working correctly.

Download Directories

This specifies where your mail and attachments will be downloaded.

Mail: Shows you what folder you have selected (if any) for your mail to be downloaded to.

Select Folder: Click to select a specific folder to receive downloaded mail.

Attachments: Shows you what folder you have selected (if any) for your attachments to be downloaded to.

Select Folder: Click to select a specific folder to receive downloaded attachments.

Options

From Address: Inserts this address into outgoing emails as the address the email was sent from.

Reply To Address: Inserts an address that the recipient of the email can reply to if necessary.

Send Reminders By Email If Possible: Enable this setting to use the email reminders feature.

Email Subject: Allows you to insert a default email subject for outgoing emailed reminders.

Days Between Reminders: Allows you the ability to set a number of days between each time a reminder card is emailed/printed and mailed to a client, allowing you to run reminders as often

as you'd like without worrying about sending the same reminders to the same clients week after week (for example).

Check For Bounces: Allows you to check for bounced back emails due to incorrect or no longer in use email addresses.
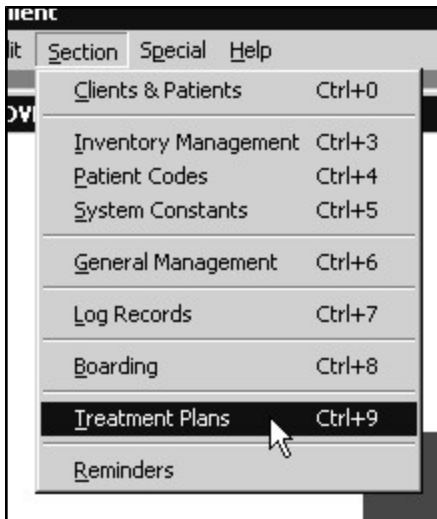
Treatment Plans

A treatment plan is defined by DVMAX as a scheduled series of one or more "To Do" items that relate to a particular course of treatment. The **Treatment Plans** listing from the **Section** menu of the DVMAX main screen provides a list of all treatments due or pending for a patient. You can also view pending Treatment Plan items for a specific patient from the Patient's record. When a selected treatment plan item is completed by clicking **Perform**, the associated treatment is recorded as an MRE in the appropriate patient record. The patient's record does not need to be open to do this. Completed or Performed treatment plan items are also recorded on the invoice.

The Treatment Plans Facility: A Quick Overview

Pending treatment plan items for a particular patient can be viewed from a patient record. However, you can use the Treatment Plan facility, accessed from the Section menu, to view a list of all pending treatment plan items for all patients. These items can be edited and completed without having to open the patient record.

To view the Treatment Plan item listing:

- From the **Section** drop-down menu, click **Treatment Plans**.

- A **Treatment Plan Items** list containing all scheduled procedures, due dates and other key details is displayed, by default sorted by time, date, and patient.

- To find items that apply to a specific patient, enter the patient's name or file number in the appropriate fields at the bottom of the list. The list will be filtered according to the information you type.

- To filter the list by all items due within a specified date range, type the start date in the **From** field and the end date in the **To** field. You can also use the Calendar to enter dates. To see all items due today, click the **Today** button. Click inside the list area to filter by the date range typed.

- If applicable, you can filter the **Treatment Plan** list by treatment room by selecting a location from the **Room** drop-down menu.
- By default, Completed items are hidden. To view all Treatment Plan items, including those already completed, deselect **Hide Completed**.
- To view the details of a Treatment Plan item, double click an item.

Completing a Treatment Plan Item

As procedures on the list are administered, they can be marked as "Done" from the **Treatment Plan** list. There are 3 ways to mark an item as completed from the **Treatment Plan** listing, and they will allow you to add an MRE to the appropriate patient record and add the associated bill item to an invoice. You can also go to a patient record to complete a Treatment Plan item.

To mark an item as completed:

- From the **Treatment Plan** list, click to select the item you wish to mark as completed.

- Click **Perform**.

- An **Add New Medical Record Entry** window opens. The appropriate Medical Record Code is already entered on the **MRE** window.

-OR-

- Double click on an item from the **Treatment Plan Items** list. This opens an **Edit Treatment Plan Item** window. Click **Perform**.
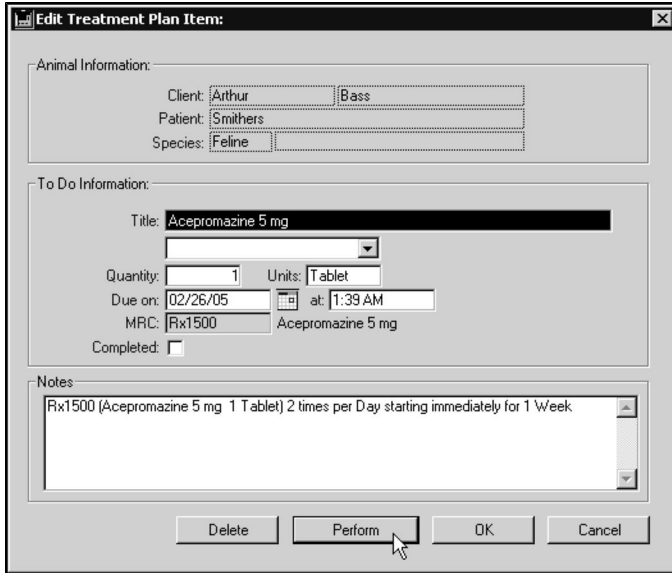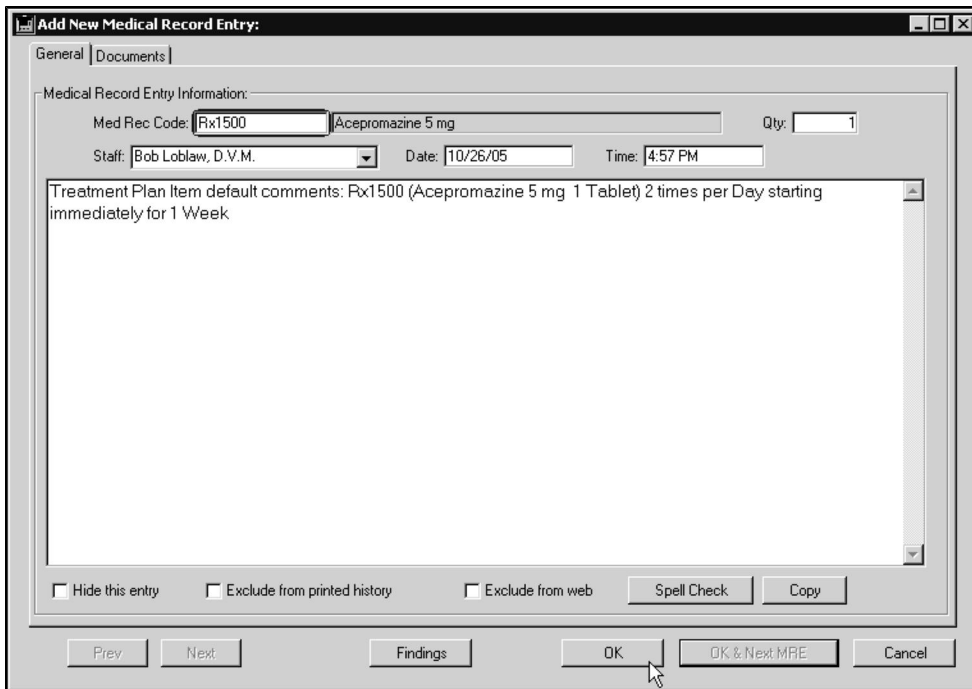
- An **Add New Medical Record Entry** window opens. The appropriate Medical Record Code is already entered on the MRE window.

- Select a staff member from the **Staff** drop-down list.
- Where applicable, click **Findings** to add findings to the MRE.
- Click **OK** to add the MRE to the patient file.

-OR-
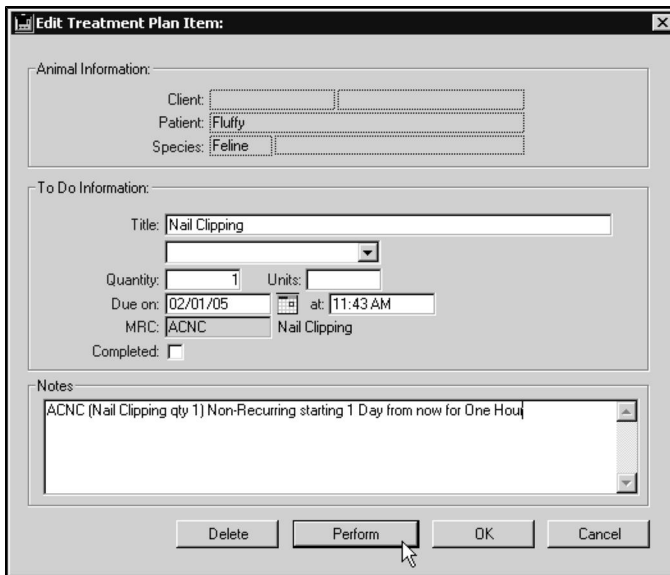
- Double click on an item from the **Treatment Plan Items** list. This opens an **Edit Treatment Plan Item** window.
- Click the **Completed** check box.
- Click **OK.**

ⓘ By default, DVMAX displays only uncompleted items on the **Treatment Plan** list. To view completed items as well, deselect the **Hide Completed Items** checkbox.

⚠ When completing Rx treatment plan items from the "pending" list, by default DVMAX does not display the Rx labeling dialog. This behavior can be changed via an advanced setting. If you would like to have the Rx labeling dialog display, contact DVMAX Technical Support and discuss adjustments to this default setting.

About the Edit Treatment Plan Item Window

The **Edit Treatment Plan Item** window contains information about the treatment plan item, including patient and client names, patient species and notes about treatment details. Some details, such as the staff to which the treatment plan item is assigned, can be modified from this window.

Adding and Performing Treatment Plans on a Patient Record

Treatment Plans are added from a Patient record, though the Plan can be completed from either the Treatment Plan listing under the Section menu of the DVMAX main screen or from a Patient record.

Adding a Standard Treatment Plan to a Patient Record: An Overview

Standard Treatment Plans are saved plans that are created under the **Treatment Plan** tab of **System Constants**. Refer to that section in the chapter System Constants for more information. To select a Standard Treatment plan to add to a Patient record:

- Open a Patient Record.
- Select the **Treatment Plans** tab.
- To choose a Standard Treatment plan, select the **Select** button.
- The **Select a Standard Treatment Plan** window will appear.
- Select one of the listed Treatment plans.
- Click **Select**.
- The Treatment Plan window opens.
- Make any required changes to the Treatment plan.
- Click **OK.**

The Treatment Plan is then added to the Treatment Plan list. Once the Treatment Plan is in the list you are able initiate this Treatment Plan. To Perform a To Do item related to a Treatment Plan:

- Select the Treatment Plan To Do item from the list.
- Click **Perform.**
- The Treatment Plan To Do item dialog opens.
- Make any edits to the treatment plan item, as needed.
- Click **OK.**

Adding a New Treatment Plan to a Patient Record: An Overview

To add a New Treatment plan to a Patient record:

- Open a Patient Record.
- Select the **Treatment Plans** tab.
- Select **Create**.
- The **Create a Treatment Plan** window opens.
- Click **Add**.
- Create the Treatment plan including Code, Quantity, Duration, Frequency, Schedule, Duration and notes.
- Click **OK.**

The New Treatment Plan is the added to the Treatment Plan list. Once the Treatment Plan is in the list you are able initiate this Treatment Plan. To **Perform** a To Do item from the Treatment Plan:

- Select the Treatment Plan To Do from the list.
- Click **Perform.**
- The To Do Item dialog opens.
- Make any edits to the item, as needed.
- Click **OK.**

Create a Treatment Plan

A treatment plan can only be added or built from a patient record. To build a treatment plan:

- From a patient record, select the **Treatment Plan** tab.
- Click **Create** to build a custom plan, or choose **Select** to load a saved plan.
- This opens the Treatment Plan window.

- In the **Name** field, type a name for the Treatment Plan. For a new treatment plan, the default name is Default Treatment Plan. If you choose a saved plan, the name of the plan will already be defined.
- From the Treatment Plan window, click **Add**. This opens the individual Treatment Plan Item detail window.

- From the Treatment Plan Item window, type an MRC in the **Code** field.

-OR-

- Type a partial code and press <TAB> to display an MRC lookup window, then select a code from the list.

- In the **Quantity** box, type the quantity of the selected procedure to administer each time treatment is given. For example, type the number of tablets of a medication to be administered per treatment. If 3 tablets are to be given at each interval, the Quantity is 3. For procedures such as exams, the Quantity is typically 1 per interval.

- Type the unit of measurement as it relates to the administered procedure (if applicable) in the **Units** box.

- If you want to use the Schedules option, click the **Use Schedule** checkbox. The **Interval** drop-down list will be replaced with a **Schedule** drop-down list, and a First Day Times box will display below the Duration field.

- Choose a start time from the **Start Delay** drop-down list or type a Start code. The Start offset value determines when the treatment plan should begin.

- Choose an interval from the **Frequency** drop-down list or type a Frequency (interval) code. This indicates how often to administer the treatment. If you clicked the **Use Schedule** checkbox, the **Frequency** drop-down list will be replaced with a **Schedule** drop-down list.

- Select the duration from the **Duration** drop-down list or type a Duration code. This identifies how long the treatment plan is to continue.

- If you selected the **Use Schedule** checkbox, a **First Day Times** box will be displayed below the **Duration** drop-down list. The number of available **First Day Times** fields will range from 1 to 4, depending on the **Schedule** you selected. For example, if you chose **BID** from the **Schedule** list, there will

be 2 **First Day Times** fields available and a default time will display in the **Time 1** and **Time 2** fields.

ℹ️ The **Use Schedule** option allows you to chose pre-set times for repeated events, giving you further control over scheduling delivery of treatment plan items. Schedules can have up to 4 fixed treatment delivery times per day, depending on what you select from the **Schedule** drop-down list. **First Day Times** are defined as the scheduled daily delivery times for the treatment plan item.

- The **# Items To Be Created** field indicates the total number of items created by the Treatment Plan. This number is calculated automatically after you have entered Start, Frequency or Schedule and Duration values.

    - Add notes or comments where needed in the **Comments** box.

    - Click **OK** to add the item to the Treatment Plan.

- You will be returned to the Treatment Plan window. The Treatment Plan item details appear in the columns in the **Items** area.

- The Treatment Plan item summary line appears in the Treatment Plan box on the bottom half of the Treatment Plan screen.

- If you want to add more items to the Treatment Plan, click **Add** to repeat the Add To Do Item process.

Printing Treatment Plans

You can print the Treatment Plan listing in two formats: Regular and Compact. The contents of each format will be the current view (i.e. with any filters applied) in the Treatment Plan Items list.

The **Regular** format prints one page per patient. Patient information is printed in the header of each page, and Treatment Plan items are printed in rows, with columns for Date, Time, Treatment, Qty, Units, and MRC.

The **Compact** format essentially duplicates the current view in the Treatment Plan Items list. Each Treatment Plan Item is printed on an individual line, with columns for Date, Time, Qty, MRC, Patient, Staff, Room, Title (of the Treatment Plan Item), and Notes.

To print the current list of items in the Treatment Plan Item list:

- From the Treatment Plan list, click **Print**.
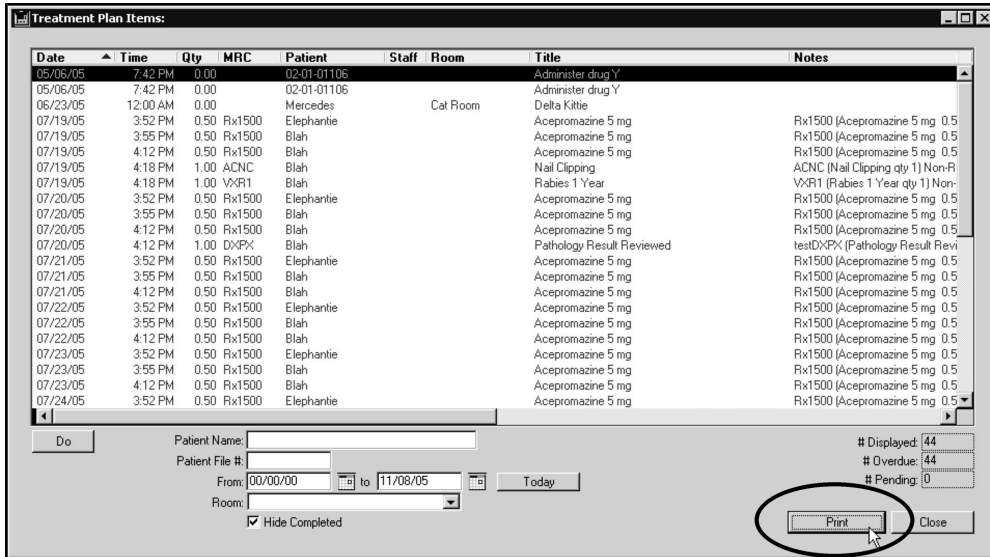
- Click **Regular** or **Compact** from the Confirm dialog.
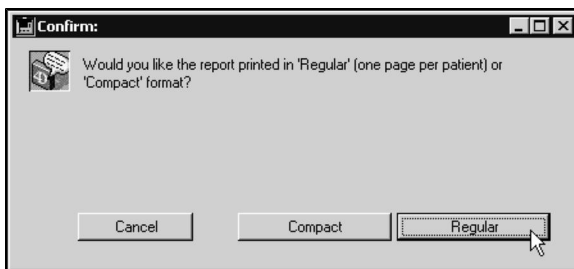
Vendors

DVMAX uses Vendor records to identify and standardize the names for the sources of inventory for your practice. Vendor records are connected to Purchase records.

Vendor records allow you to see all purchases you have made from each vendor. Special Vendor records are used for inventory adjustments and for recording inventory use by your practice or clinic. For more information on the relationship between Vendor and Purchase records, see **Purchases**.

Vendor Records: An Overview
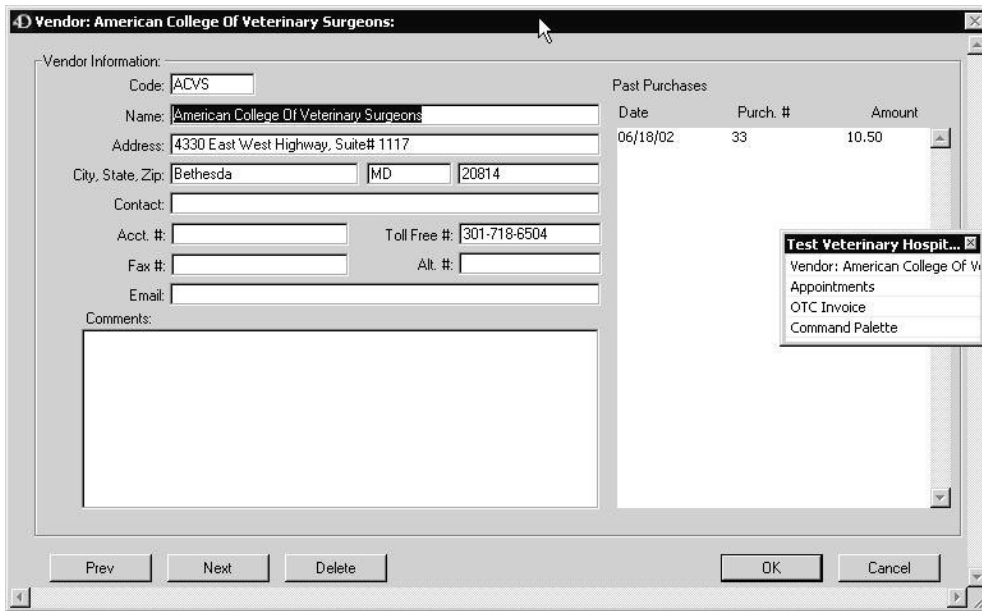
Vendor Records can provide the following information:

- Contact Information for a Vendor
- Comments or notes about your dealings with a Vendor
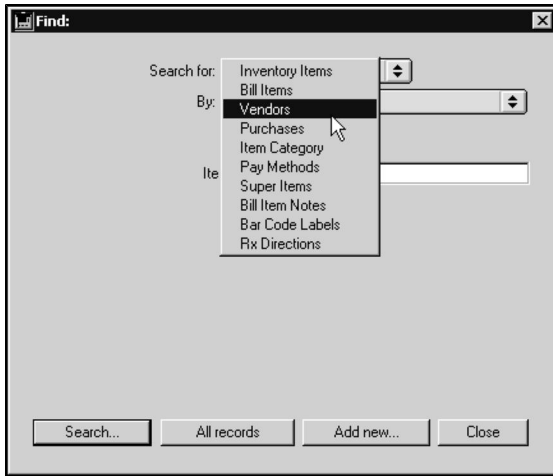- A list of your clinic's past purchases from a Vendor

Creating a New Vendor Record

To create a new Vendor in DVMAX:

- Choose **Inventory Management** from the **Section** drop-down menu.

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

- Select **Add New**.
- A **New Vendor** record dialog opens.
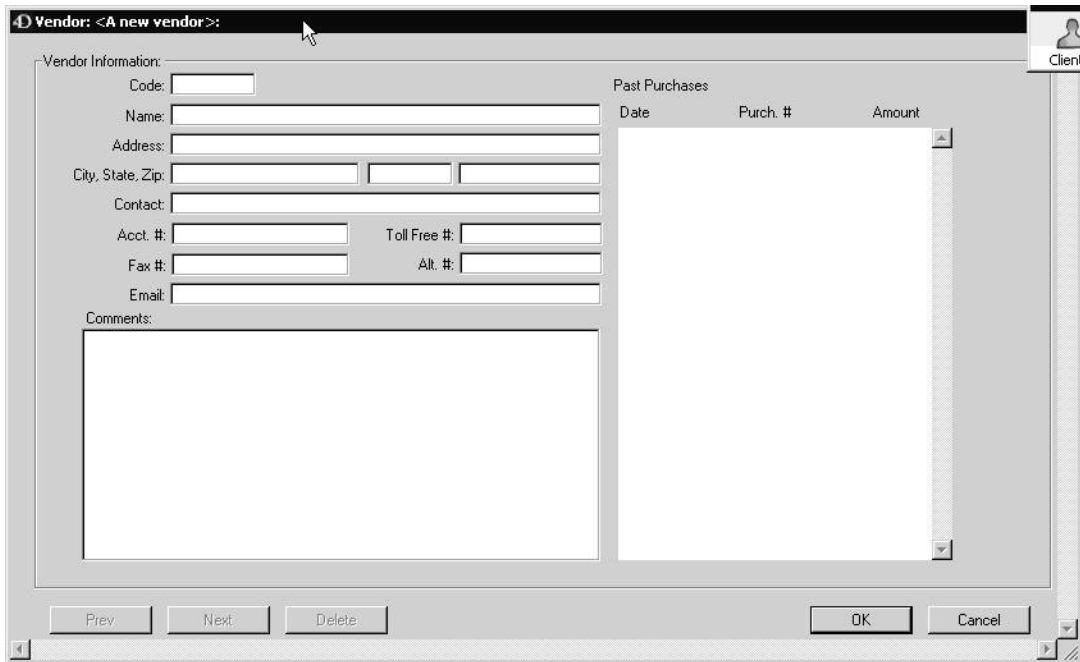
- Type a unique code for this vendor into the **Code** field. This code identifies the Vendor, and can be up to 8 characters long.
- Type the vendor's name into the **Name** field. The vendor's name can be up to 40 characters long.
- Type the vendor's mailing address into the **Address**, **City**, **State**, and **Zip** fields.
- Type the name of your practice's contact within the Vendor's company into the **Contact** field.
- Type your account number, if any, with this Vendor into the **Acct#** field.

- Type the Vendor's phone and fax numbers into the **Toll Free#**, **Fax #**, and **Alt #** fields.

- Type the vendor's **Email** address in the **Email** field..

- Type any relevant information about this Vendor into the **Comments** field.
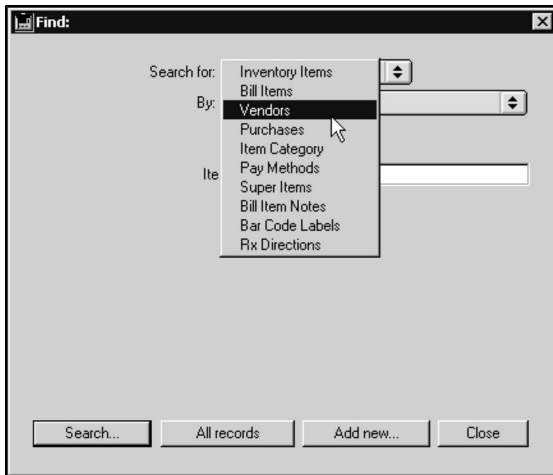
- Click **OK** to save the Vendor record.

Search for a Vendor Record

To search for a Vendor record in DVMAX:

- Choose **Inventory Management** 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, choose **Vendors** from the **Search For** drop-down list.

Find:

Search for:
- Inventory Items
- Bill Items
- Vendors
- Purchases
- Item Category
- Pay Methods
- Super Items
- Bill Item Notes
- Bar Code Labels
- Rx Directions

By:

Ite

| Search... | All records | Add new... | Close |

- Choose **Vendor Code** from the **By** drop-down list to search for Vendors by code.

-OR-

- Choose **Vendor Name** from the **By** drop-down list to search for Vendors by name.
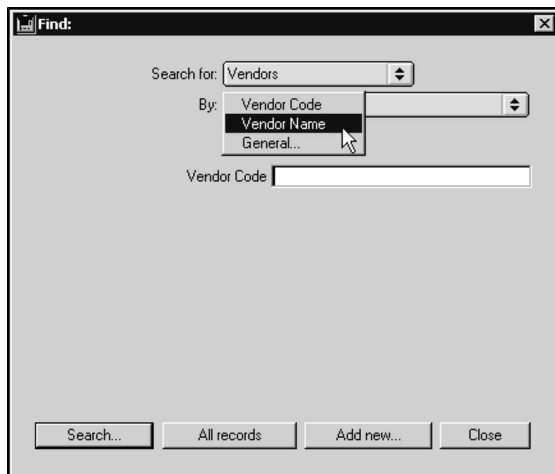
- Type a Vendor Code or Vendor Name in the field below the **By** drop-down list. The label of this field depends on your choice from the **By** drop-down list.

ℹ To find by Vendor Code, you must type at least the first character, in sequence, of the code you want to find. If you are searching by name, the characters you type can appear anywhere in the Vendor's Name field.

- Click **Search**.

If there is more than one match for your search, the Vendors List window will appear, containing a list of items that matched your search.

- If there is only one Vendor that matches your criteria, DVMAX will open that Vendor record.
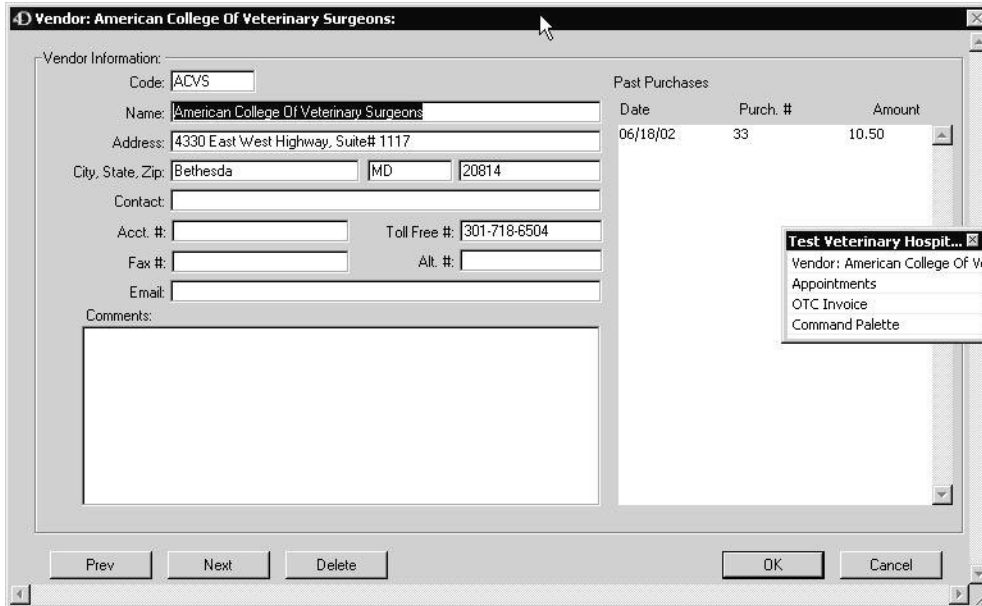
- If there are no matches, DVMAX will display a message to that effect and return you to the **Find** window. Try your search again.

ℹ️ You can also quickly locate a Vendor by following the steps in Listing All Vendors and double clicking the one you are interested in from the list.

Listing All Vendors

To list all Vendor records in DVMAX:

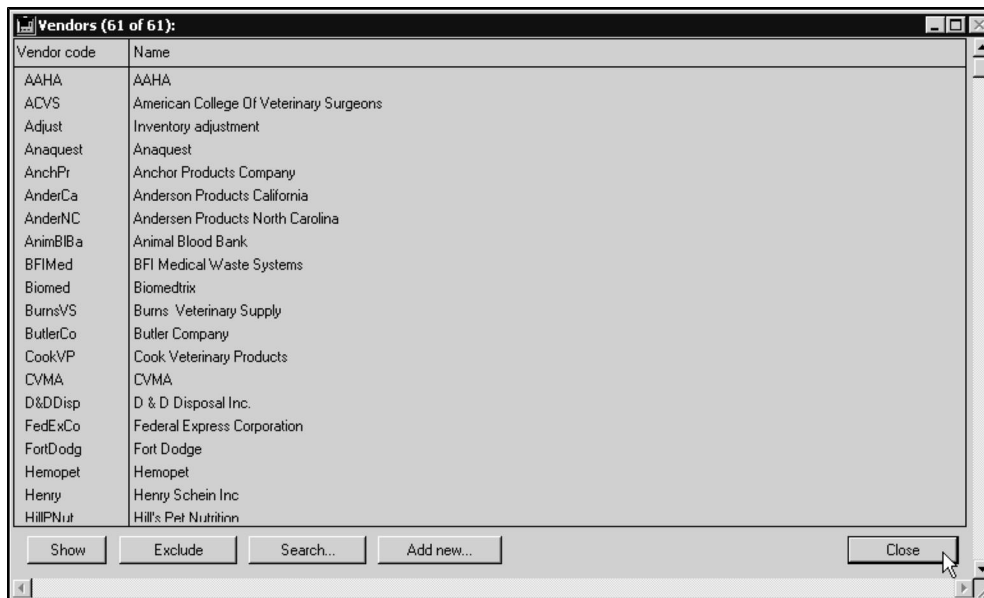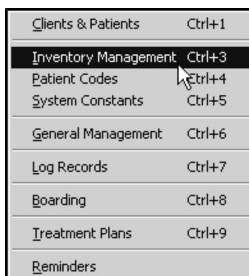- Choose **Inventory Management** from the **Section** menu.

- From the **Find** window, choose **Vendors** from the **Search By** drop-down list.
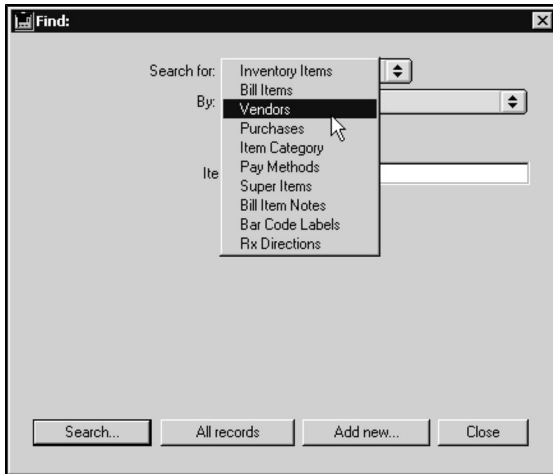
- Click **All Records** at the bottom of the **Find** window. A list of all Vendor records opens.
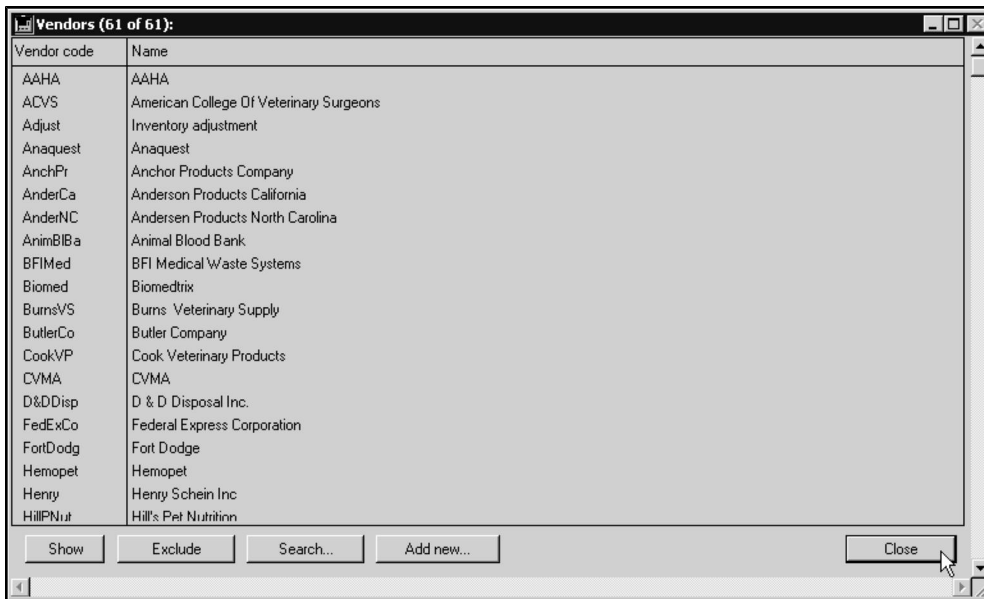
- Each Vendor is listed on an individual line, with columns for code and Vendor name.

Deleting a Vendor Record

To delete a single Vendor record from DVMAX:

- Find and open the Vendor you wish to delete. See **Search for a Vendor Record.**
- Click the **Delete** button at the bottom of the Vendor window.
- DVMAX will ask you to confirm that you want to delete the Vendor record.

- Click **Delete**.

To delete multiple Vendors from DVMAX:

- List all Vendors (see **Listing All Vendors**).
- Click to select the Vendor records you wish to delete.

 Press and hold the <SHIFT> key to select multiple adjacent Vendors from the list. Press and hold the <CONTROL> key to select multiple non-adjacent Vendors.
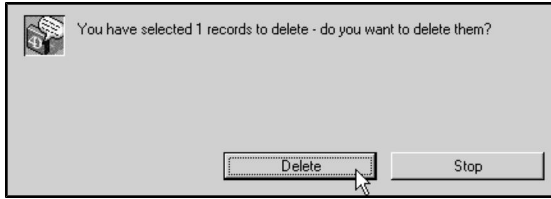
- Choose **Delete Records** from the **Vendors** menu.

- DVMAX will ask you to confirm that you want to delete the Vendor records.

- Click **Delete**.

About the Adjust Vendor Code

DVMAX uses the **Adjust** Vendor code to record adjustments to your inventory levels. By making purchases with the **Adjust** Vendor code, you can set up initial inventory levels and make corrections to recorded inventory levels.

When the **Adjust** Vendor code is used on a purchase:

- DVMAX permits you to purchase negative quantities. This means you can use the Adjustment vendor on a purchase to record an increase or decrease of inventory levels.
- DVMAX will not calculate any sales tax, since there is no real purchase being made.

- The costs that you put into the adjustment purchase will update the cost in the system.

- The **Adjust** Vendor code is installed with DVMAX and cannot be altered or deleted. DVMAX notifies you of this when you open the **Adjust** Vendor record:

```
┌─────────────────────────────────────────────────────┐
│ Alert                                                │
├─────────────────────────────────────────────────────┤
│  ┌───┐                                               │
│  │ ! │  This is the adjustment vendor, no changes can be made to the │
│  │   │  name or code.                                │
│  └───┘                                               │
│                                                      │
│                                                      │
│                                        ┌──────────┐  │
│                                        │    OK    │  │
│                                        └──────────┘  │
└─────────────────────────────────────────────────────┘
```
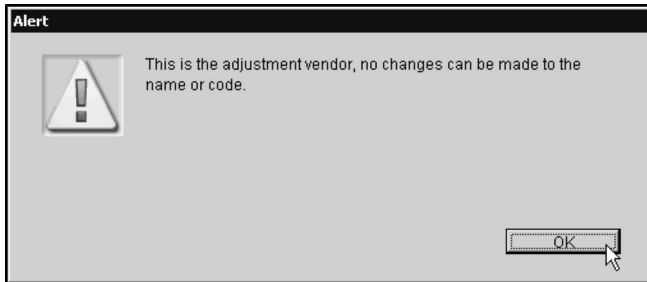
See **Purchases** for more information.

Listing Inventory Adjustments

To list all Inventory Adjustments in DVMAX:

- Locate the Adjustment Vendor by searching for the **Adjust** Vendor code (see **Search for a Vendor Record**).

- All Inventory Adjustments are listed as part of the Adjustment Vendor record.

The Hospital Vendor

DVMAX uses the **Hospital** Vendor code to record inventory used by your practice. The **Hospital** Vendor code allows you to record your use of inventory items (such as foods, cleaners, cage supplies, etc.) even though they are not billed.

When the **Hospital** Vendor code is used on a purchase:

- DVMAX treats the purchase as consumption, reducing the inventory on hand. All quantities are automatically set as negative.

- DVMAX measures purchases in Dispensing units. All other purchases are measured in Purchasing units. This makes it easy to record the consumption of individual cans of food, etc. See **Inventory** for more information on Purchasing and Dispensing units.

- Changes in the cost of an item are not recorded.

⚠ The **Hospital** Vendor code is installed with DVMAX and cannot be altered or deleted. DVMAX notifies you of this when you open the **Hospital** Vendor record:
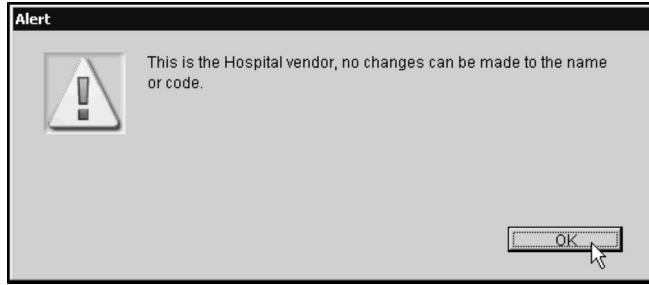
Listing Hospital Inventory Use

To list all Hospital inventory use:

- Locate the Hospital Vendor by searching for the **Hospital Vendor** code (see **Search for a Vendor Record**).

- All Hospital Purchases are listed as part of the Hospital Vendor record.

Vetstreet (Pet Portals) and DVMAX

DVMAX works with the Vetstreet/Pet Portals systems to permit your clients access information about their animals online and receive extensive educational materials. To use this feature, you must have a Vetstreet/Pet Portals account set up and have DVMAX configured to stream data to Vetstreet.

DVMAX exports specific client and patient information, such as patient history, appointment details and reminders, to Vetstreet on a set, daily timetable. For more information on Vetstreet (formerly Pet Portals), visit www.vetstreet.com.

⚠️ To enable Vetstreet to work with DVMAX, you need to contact DVMAX Technical Support at 1 800 950 5455. Our Technical Support staff will guide you through the basic setup process. Please have your DVMAX ID ready when calling Technical Support.

Web PACS, Diagnostic Imaging and DVMAX

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

DVMAX continues to support integration with Purview as well. While you cannot make use of the requisition features with Purview, you can still access your diagnostic imaging platform directly from the patient record.

To use new imaging features:

- Your provider has to be IDEXX Web PACS or Purview. Note that integrated requisition features are only available with IDEXX Web PACS.

- You must have an IDEXX Web PACS account (to use the Web PACS features) or a Purview account configured for use in DVMAX.

- For IDEXX Web PACS, you will need to set up requisitions via the Integration Wizard.

Setting Up Requisitions for IDEXX Web PACS Integration

The **Integrations Setup Wizard** lets you set up functionality to submit requisitions from DVMAX to IDEXX Web PACS. After setting up Web PACS integration, you will need to ensure the Web PACS monitor is running. Below is a general overview of setting up requisition submission. For more information on setting up requisitions for IDEXX Web PACS integration, please see **Integrations, Requisitions and Lab Results**.

To set up requisition submission for IDEXX Web PACS:

- From the **Section** menu, select **General Management** -> **Utilities**.

- Choose **Integrations Setup Wizard**.

- From the **Provider** drop-down menu, choose **IDEXX Digital**.

- Select **This Provider Is Active** to make the provider, IDEXX Digital, active. If the provider is not active, you cannot use the integration features in DVMAX for this provider.

- Select **Requisitions Can Be Canceled** if this provider permits the Canceling of Requisitions and your clinic wishes to access this option.

- Enter your IDEXX account credentials. These credentials will be applied globally, so that all terminals can make use of the requisition feature. Your SAP ID is entered automatically by DVMAX and is not editable from the **Integrations Setup Wizard**.

- From the **Provider Codes** tab, you can view the list of IDEXX Digital Provider codes. You cannot add or edit Provider codes on this list.

- From the **Billing Codes** tab, link DVMAX Bill Codes with IDEXX Digital Provider Codes. This step is mandatory in order to accurately capture charges associated with submitted requisitions. Double click a record to view and edit.

Enabling the IDEXX Web PACS Monitor in DVMAX

Once you have used the Integrations Wizard to configure DVMAX to work with IDEXX Web PACS, you will need to turn on the Web PACS Monitor to allow DVMAX to send and receive information from Web PACS. For more information on setting up requisitions for IDEXX Web PACS integration, including the Web PACS Monitor, please see **Integrations, Requisitions and Lab Results**.

To start the Web PACS Monitor:

- From the **File** menu on the DVMAX main screen, choose **Preferences**.

- From the **Assorted Prefs** tab of the Preferences dialog, go to the Web PACS Monitor section.

- To automatically start the monitor when DVMAX is running, choose **Monitor Auto Start**.
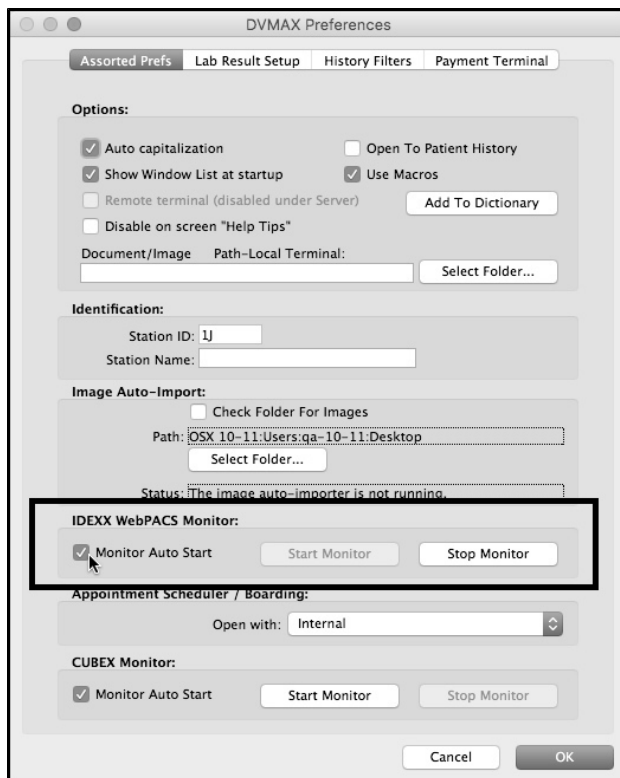
- To manually start the monitor, click **Start Monitor**.

- To stop the monitor, click **Stop Monitor**.

Create and Submit an IDEXX Web PACS Requisition

Once you have configured the IDEXX Web PACS requisition provider from the **Integrations Setup Wizard** and started the Web PACS monitor, creating a requisition is as easy as adding an MRE to a patient record or bill item to an invoice. After a requisition is created, you have to submit the requisition.

A new requisition is created when you add an MRE with an associated Bill Item Code and linked Provider code to a patient record, or when you add a Bill Item with a linked Provider code to an invoice. A requisition record is created for the associated imaging request and a small Requisitions dialog displays, much like what you see with invisible invoicing. You can add multiple Web PACS requests to the same requisition. Requisitions for more than one provider will display in their own Provider tab on the Requisitions window (for example, you can create requisitions for VetLab, IDEXX Reference Lab or Antech/Zoasis as well). Refer to the chapter **Integrations, Requisitions and Lab Results** for more information.

To create a new requisition:

- Open a patient record to the **History** tab.
- Click **New MRE**.
- The Add New Medical Record Entry dialog opens. Type the code MRE in the **Code** field and enter any Notes in the **Notes** section. When an MRE associated with a Bill Item and linked IDEXX Web PACS Provider code is added to the patient record, the Requisition will be added to the invoice as soon as the MRE is saved.
- Click **OK** or **OK and Next MRE**.
- The Requisitions floating window opens with the requisition or panel displayed.
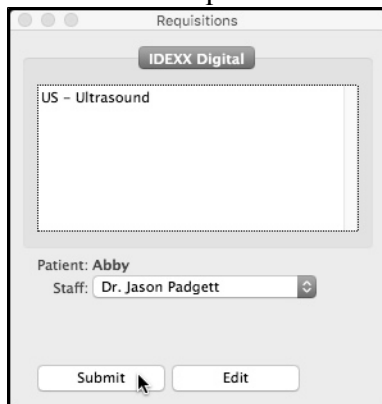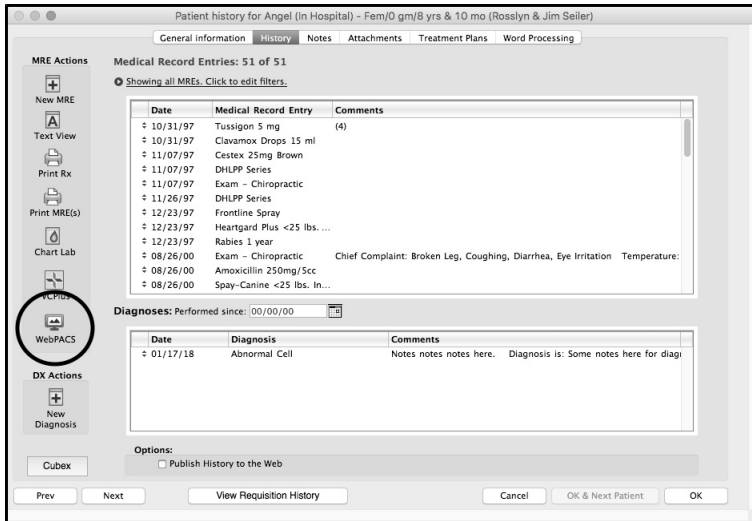

- Add any additional MREs to the patient record. Those MREs linked via Bill Item to a Provider code or panel will add more requisition items to the Requisition dialog.
- Click **Submit** from the Requisitions window to submit the requisition. IDEXX Web PACS will receive the imaging request from DVMAX via the Web PACS monitor.
- Your in-house PACS will pick up the order from IDEXX Web PACS. Once your order is filled, it is sent to IDEXX Web PACS and placed in Cloud storage.

A requisition is created as soon as the line item is added to the invoice or the MRE is saved to the patient record. Deleting or editing the line item will not remove the associated requisition, though the charges associated with the deleted requisition will be removed. For more information on creating or working with requisitions, see the chapter **Integrations, Requisitions and Lab Results**.

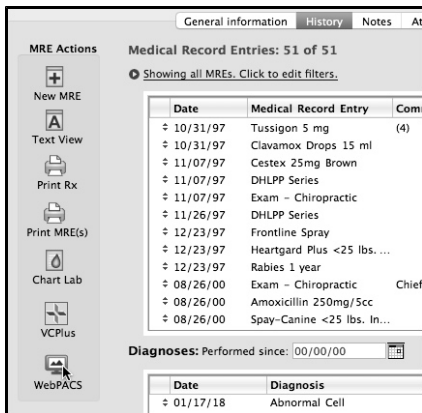# View Diagnostic Images from the Patient Record (Web PACS)

You can now access diagnostic images for a patient directly from the patient History tab. This replaces previous imaging functionality that was accessed via the DICOM tab of the patient record (version 8.6 and earlier). This feature must be enabled before it can be used. DVMAX supports IDEXX Web PACS and PurView imaging platforms.

If the patient record you are viewing has images, the **WebPACS** button, located on the lower left side of the History screen, will be white and red. If there are no images for the patient, the button will be grey.

To view images via Web PACS:

- From the Patient History dialog, click the **WebPACS** button.

- Where prompted, log in to your PACS account.
- Use your Web PACS platform as you would normally.

![info icon] If you have any questions about your IDEXX Web PACS account or credentials, please contact IDEXX Web PACS.

![info icon] If images for the selected patient do not exist, clicking the WebPACS button will launch the home page associated with your PACS service. For example, in the case of IDEXX Web PACS, the VetConnect PLUS home page will open once you log in. The VetConnect PLUS home page provides additional search, setup and review options.

VSurv and DVMAX Integration

VSurv is an automated client satisfaction measurement system from VetEd. It is designed to:

- Send survey emails to a practice's customer base.
- Report survey results back to the practice.
- Alert the practice if a customer has had a bad experience.

Sending VSurv Surveys to Customer Base

Once a day, DVMAX will pull data of clients who have completed a finished invoice over the last five days.

The Client data collected includes:

- Client ID
- Title, First Name, Last Name
- Address 1, Address 2, City, State
- E-mail
- Phone Number, Fax Number
- New Client (true or false)
- Client Status Code
- Client Status - Description of those who have had a finished invoice within the last 5 days

The Patient data collected includes:

- Patient ID, Patient Name,
- Species, Breed, Sex, Color, Weight,
- Visit Reason,
- Visit check in Time & Date, Visit checkout Time & Date,
- New Patient (True or false),
- Euthanized (true or false),
- Microchip ID,
- Rabies Tag #,
- Patient Birthday (exported as Date of Birth)
- Patient Status,
- Patient Status Description

⚠ DVMAX places this data in a specified location on the users hard drive or network. The data is then collected by the VSurv Client, which uploads the information to the VSurv Server for processing.

The VSurv Server then generates a series of email invitations to specified clients asking them to take part in an online quality survey based on their last visit.

VSurv is an Internet based system and can only send out email requests to clients who have a valid email address.

Receiving VSurv Survey Results

When a client accepts to take part in an online survey, the results are collected by the VSurv Server and forwarded to the practice for review.

A file containing survey results is sent to DVMAX. When these results are received:

- DVMAX is alerted that results from VSurv have been received
- Alert messages are created for appropriate clients
- Clients report having had a negative experience at the practice are noted.

In addition, survey results can reviewed on the VSurv website.

To view the results via the web:

- Go to www.vsurv.com
- Enter your username and password

You will presented with a list of options including:

- View Reports
- Manage Surveys
- Manage Alerts
- Edit Client E-mail

View Reports allows you to view survey Reports

Manage Surveys allows you to add or delete questions included in the survey.

Manage Alerts allows you to edit when a client survey response will warrant an alert in DVMAX.

Edit Email allows you to edit the greeting email sent out with the survey.

Setting Up VSurv

⚠ To enable VSurv to work with DVMAX, you need to contact DVMAX Technical Support at 1 800 950 5455. Our Technical Support staff will guide you through the basic setup process.

Please have your DVMAX ID ready when calling Technical Support.

In general, the steps involved include:

- From VSurv, you will need to complete a VSurv application, and acquire a VSurv username and password.

- Download and follow the VSurv installation instructions.

- After installation is complete it will ask you to identify your practice software. Choose DVMAX.

- VSurv will then ask for your VSurv username and password, which you would be assigned during the application process with VSurv. Enter your VSurv username and password.

- Unzip vsurvdataaccess.dll to c:\program files\vsurvclient\ and select "Yes" to overwrite existing file.

- Select Run/Programs/Animal care Technologies/vsurv/vsurv

- Choose DVMAX as the practice software.

Word Processing and Document Handling

DVMAX's integrated, full-featured word processing facility makes it possible for you to quickly and easily create customized letters, reminder cards, rabies certificates and any other documents you require. You can access the word processing features of DVMAX from Clients, Patients or Referral Source sections, and the documents you create and save can be made available to all of the workstations on your network. The flexibility of the word processing facility allows you to create individual case documents or build document templates that can include virtually any data from a client, patient or referral source record.

ⓘ For Macintosh Users - Apple now recommends that all documents have a filename extension.

Opening Word Processing

You can access the Word Processing function from a client, patient or referral source record. To open the Word Processing facility:

- From a patient record, select the **Word Processing** tab or choose **Word Processing** from the **Patient** drop-down menu.
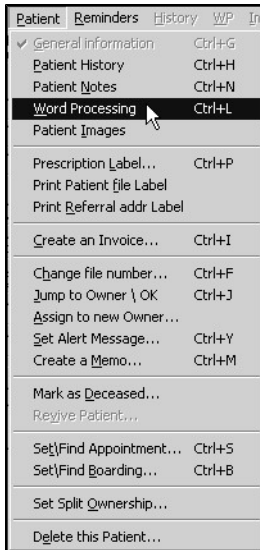
- From a client record, select the **Word Processing** tab or choose **Word Processing** from the Client drop-down menu.
- From a referral source record, choose **Word Processing** from the **Referral Source** drop-down menu.
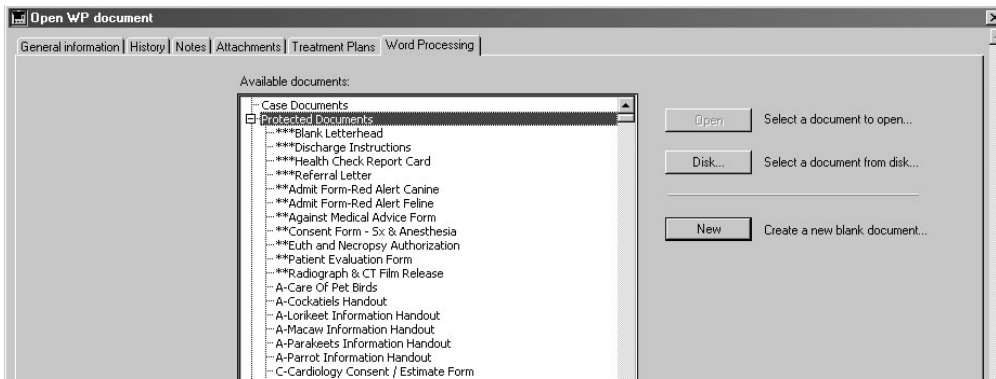
- The Word Processing tab will present two options including opening a **New Blank Document** or opening a **Document Template**.

- If you wish to open a blank document select **New**.

- If you wish to open a pre-existing **Template** select the document in the document list and select **Open**.

Document Templates

DVMAX provides a long list of useful documents in the Word Processing tab. These documents include:

- Templates used for everyday working tasks. These are usually Protected documents

- Detailed Health information listings provided by Lifelearn

Protected Document

Some documents listed in the Word Processing tab have an asterisk before the document name. These asterisk usually distinguish the document as a Protected Document and are used to place the most commonly used documents at the top of the document list. Protected documents are usually templates that are used for daily tasks around the clinic.

For more information view *Save As Template* and *Overwriting Protected Documents* later in this chapter.

Lifelearn Health Documentation

DVMAX has provided a series of health related documents from Lifelearn. These documents provide background information on a series of common ailments. This can be printed or emailed to the client for further reference. These documents are listed alphabetically and do not have an asterisk in front of the name.

To open a Health document:

- Select the document you wish to open

- Select the Open button

- The document will then open in the Word processing window.

Navigating the Word Processing Facility

The Word Processing window is made up of several parts. These include:

- A main Word Processing menu bar above the text area, with drop-down menus such as **File**, **Edit**, **Insert** and **Tools**. (See also, *About the Word Processing Menus*.
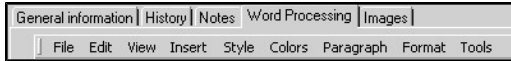
- A white document area.

- Four toolbars, which may appear above or below the menu bar, depending on the toolbar. By default, some of the toolbars are hidden. To view, select one or more toolbars from the **Toolbars** list under the **View** drop-down menu.
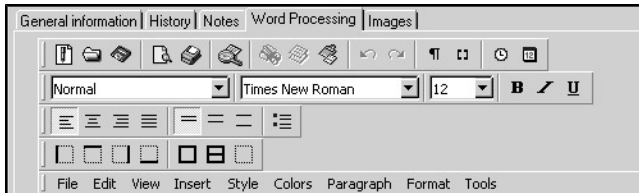
- A **WP Fields** menu, which can be accessed by clicking the **Show Palette** button.

- A horizontal ruler, located above the text area and a vertical ruler on the left side of the text area.
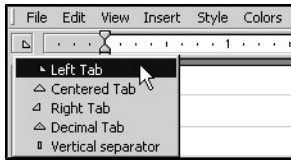

About the Rulers

The rulers display the position and type of tab stops, the position of margins and the position of the first line indent. There are 2 rulers on the WP window: the horizontal ruler at the top of the text area, and the vertical ruler on the left of the text area.

The horizontal ruler consists of two main parts:

- The ruler itself displays the location and type of tab stops as well as the location of the margins. Symbols appear along the ruler to indicate the position and type of tabs as well as the location of the margins.

- A drop-down menu, located at the top left end of the ruler, allows you to select a type of tab.


- The vertical ruler allows you to adjust top and bottom page margins, as well as letting you quickly resize the header and footer areas as needed.

For more information about how to use the ruler to set tabs and margins, see *Format a Document*.

 Using the **Copy Ruler** command from the **Paragraph** drop-down menu lets you copy all ruler settings from a current paragraph (including tab type and location, first line indent, and margin settings) and apply them to any other paragraph(s) you select.

E-Mailing an Open Word Processing Document

You can initiate e-mail directly from the e-mail button at the bottom of the Word Processing window.
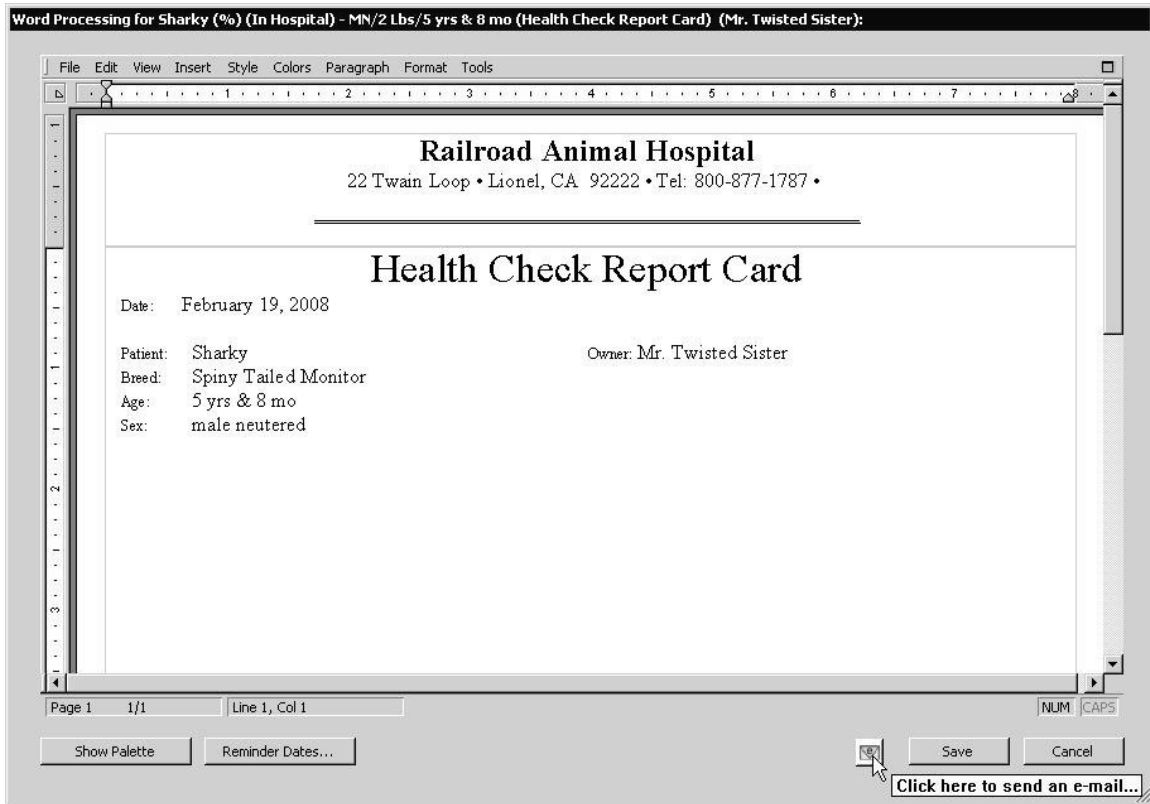
- Click the email icon, and the Email WP Document window opens.
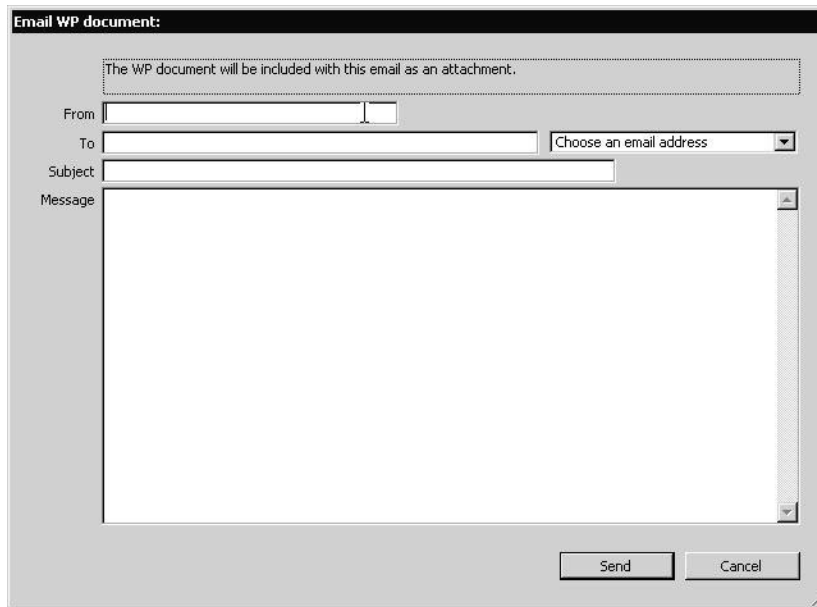
- Specify an email address in the **From** field. If there is only one possible **To** address, it is entered automatically. Complete the Subject field and Message body, and click **Send**.

About the Word Processing Menus

There are 2 menu bars that relate to the Word Processing facility:

- The WP drop-down menu is available from the DVMAX menu bar until you open a WP document.

The **WP Fields** menu, accessed by clicking the **Show Palette** button, is used for inserting references in to word processing documents

WP Menu

The **WP** menu is located on the DVMAX main menu bar when a patient, client or referral source record is open. This menu allows you to delete the current word processing document,

WP Fields and the Word Processing Palette

The WP Palette replaces the WP Menu in Word Processing. It is accessed by clicking **Show Palette** from an open WP document and provides tools for inserting specific references from a record in to a document. Items like client name, patient name, addresses, reminders, logs and more can be automatically inserted to quickly create customized documents or templates. See *Inserting References* as well as the *Word Processing* sections in Client, Patient and Referral Source chapters for more information on the **WPPalette**.

Main Word Processing Menus

The Word Processing menu bar has 10 drop-down menus. Many of the functions listed under the menus can also be accessed from the toolbars (see *About the Toolbars*). The word processing menus are briefly described below.

File - The **File** menu located on the Word Processing menu bar is used for printing, opening and saving files and for accessing word processing preferences. See the related sections in this *Word Processing* chapter for more detail.

⚠️ All references to the **File** menu in this Word Processing chapter refer to the **File** menu located on the Word Processing menu bar and not the **File** menu on the DVMAX menu bar.

Edit – From the **Edit** menu you can access familiar word processing features such as Cut/Paste, Undo or Re-do, and the Find/Replace features. It also allows you to modify the character case (toggle between upper and lower case) and to select the whole document. See *Edit a Document* for more detail.

View - The **View** menu is used to choose how the document is displayed. See *Viewing Options for Documents, Menus and Toolbars* for more detail.

Insert – Use the **Insert** menu to insert certain references, such as current date, time, and page number. You must use the **WP** menu to insert specific references relating to a client, patient or referral source record. See *Inserting References* for more detail.

Style - The **Style** menu gives you access to defining certain attributes of selected text, including plain, bold, underline, italics and case. See *Format a Document* for more detail.

Colors – Use the **Colors** menu to choose a color for selected text or other characters. See *Format a Document* for more detail.

Paragraph – The **Paragraph** menu allows you to define or modify settings for selected paragraph(s), including line spacing, justification and alignment. It also lets you select and insert bullets, and to copy or paste the Ruler (to apply formatting from one paragraph to another). See *Format a Document* for more detail.

Format – The **Format** menu provides access to the format choices for many style-related items, including font type and font attributes, tab settings, borders, paragraph alignment, and column format. It enables you to access the style sheet dialogue box as well. See *Format a Document*.

Tools – From the **Tools** menu you can select a spellchecker, define a language for the document, display and edit the properties of the document (title, subject, author and notes) and display document statistics (word count, number of characters, paragraphs and so on). It also allows you to update or freeze 4D references in the document. See *The Tools Menu*.

About the Word Processing Toolbars

When you first access the Word Processing function, the toolbars may be hidden. You can be display one or more toolbars by selecting a toolbar from the **Toolbars** list under the **View** menu. The toolbars are designed to provide quick access to some features that would otherwise require the use of menu commands. The Toolbars will display above or below the Word Processing

menu bar, depending on the toolbar. See *Viewing Options for Documents, Menus and Toolbars* for more information.

There are 4 toolbars available under the **View** menu: the **Standard** toolbar, the **Format** toolbar, the **Style** toolbar and the **Borders** toolbar. All of the functions available on the toolbars are also available from the drop-down menus on the Word Processing menu bar.

The unit of measure for new Word Processing documents is inches.

Standard Toolbar

The **Standard** toolbar features the following buttons from left to right: New Document, Open Document, Save Document, Print Preview, Print button, Find, Cut, Copy, Paste, Undo, Redo, View Invisible, View References, Insert Current Hour and Insert Current Date. Information on applying these commands is available from the related sections in the *Word Processing* chapter.

Format Toolbar

The **Format** toolbar includes the text alignment buttons, the line spacing buttons and the bullet button. These are also available from the **Paragraph** and **Format** menus on the Word Processing menu bar. This toolbar is displayed by default. See *Format a Document* for information on applying these commands.
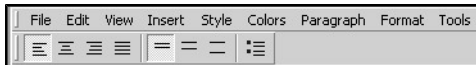
Style Toolbar

The Style toolbar offers a **Style Sheet** drop-down list, a **Font** drop-down list, a **Font** size drop-down list, and a set of 3 **Style** buttons (for bold, italic and underline styles). This toolbar is displayed by default. See *Format a Document* for information on applying these commands.
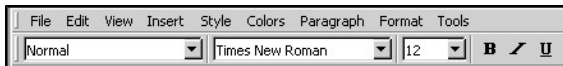
Borders

The **Borders** toolbar contains 2 sets of buttons: the individual border buttons and the frame buttons. See *Format a Document* for information on applying these commands.

Using Paragraph-Based Formatting

As is common with full-featured word processing applications, DVMAX's Word Processing facility uses paragraph-based formatting. This means that most formatting -like line spacing, justification, margins and tab stops - is applied to an entire paragraph. Every paragraph within the main body of the document will have the same formatting unless you specifically change the settings, either by highlighting a paragraph(s) and applying new formatting preferences; or by using the Copy Ruler and Paste Ruler commands to apply specific formatting to a selected paragraph.

Paragraphs are defined as text with a <RETURN> marking the end of the paragraph. The Word Processing function uses word wrap, and will automatically wrap your text down to the next line when you reach the right margin. Therefore, you should not press <RETURN> or <ENTER> at the end of a line unless you want to start a new paragraph.

Knowing how to format your document is helpful when creating new templates for items like reminder cards, where you may want to vary the paragraph formatting in different parts of the document. See *Format a Document* for more information on paragraph formatting.

Using Word Processing Templates

The word processing function can be used to create a plain document for use only for one client, patient or referral source. However, most of the documents you create using DVMAX's word processing function will be templates, meaning they will not be written for use for just one client or patient but can be used by any client or patient in the database.

A template is basically a form letter, where some elements of the document are dynamic (they can change each time the document is viewed or printed) while other parts of the document will be static (the content will stay the same). For example, in a client "Welcome" template, content like client name or address will change each time you open the template in a different client record, but the body of the letter will read the same for each client.

To create templates, you will use DVMAX's **WP** menu and various formatting options. Templates are saved as a special document class (either Protected Documents, Label Documents or Other Documents) in DVMAX, and can be accessed by any workstation on your network. See *Inserting References* and *Document Class* for more information on creating templates.

ⓘ When you create a template, it will be available to any record of the same type as the record in which it was created. For example, if you create a form letter in a client record, that document will be available from any other client record. See also, *Document Class*.

Document Preferences and Page Setup

The document preferences and page setup options can be selected from the word processing **File** menu.

Page Setup

Selecting **Page Setup** displays the Page Setup options window, including page orientation (landscape or portrait), paper size, and page margins. You can also choose a different printer by clicking **Printer** from the Page Setup window.
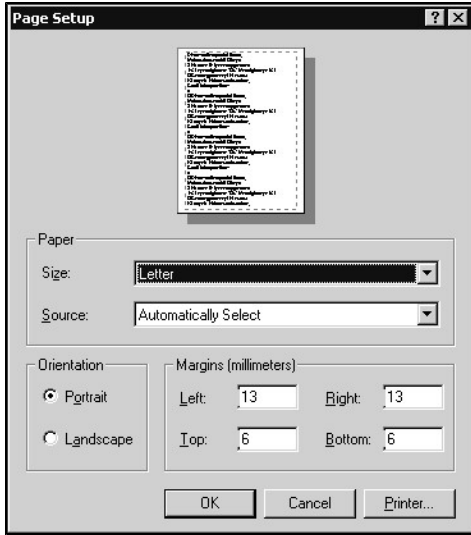
Preferences Menu

When you select **Preferences** from the word processing **File** menu, it opens a Preferences window. From the Preferences window you can set document preferences, such as ruler units (centimeters or inches), header and footer options, and widow and orphan control.
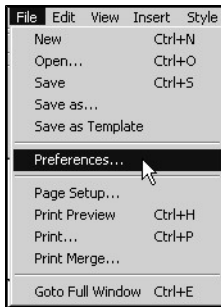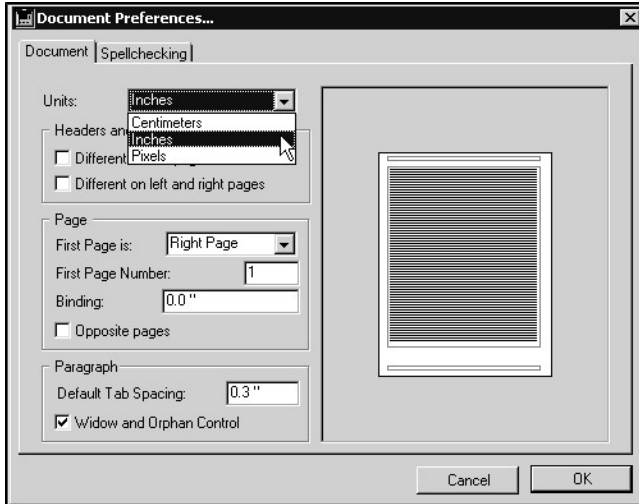

From the **Document** tab under **Preferences**, you can determine the appearance of a document, including whether headers and footers are displayed and whether a frame appears around the text area of a document on the screen.

Units

The Units option determines the unit of measurement that will be displayed on the ruler. The ruler is used to set the margins, first line indent and tabs for the document.

- From the **Units** drop-down menu under **Preferences**, select centimeters or inches.

Headers and Footers

- From the **Documents** tab under **Preferences**, select **Different on First Page** if you want to define different headers and footers for the first page and for the remainder of the document.

- From the **Documents** tab under **Preferences**, select **Different on Left and Right Page** if you want to define different header and footers for the left and right pages. If you do not select this option, the headers and footers will be the same on every page.
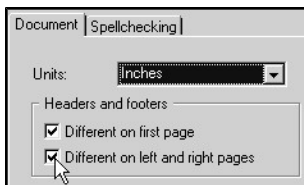
See also *Format a Document* and *View or Hide Headers and Footers* for more information on working with headers and footers.

First Page

- From the **First Page Is** option under **Preferences**, choose **Right** to set the side of the first page to the right or choose **Left** to set the side of the first page to the left.

- Type the number of the first page in the **First Page Number** box. Page numbers on the rest of the document will be updated accordingly.
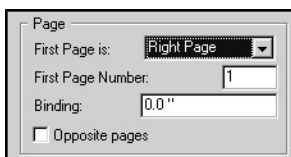
Paragraph

- In the **Default Tab Spacing** box, change the default value for tab spacing if required. This value will be applied to all the paragraphs that have no custom settings.

- Select **Widow and Orphan Control** to prevent the first line of a paragraph from being left at the end of a page. This will also prevent the last line of a paragraph from being left at the beginning of a page.
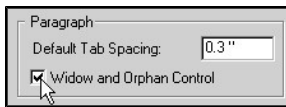
Spellchecker and Dictionaries

DVMAX comes with a built-in spellchecker and dictionary. You should not use the **Spellchecker** settings under **Preferences** under Word Processing. You will, however, want to configure the Shared Dictionary function in order to make the same dictionary available to all workstations. See *Shared Dictionary* in this User Guide.

Go To Full Window

Select **Go To Full Window** to expand the word processing window to the screen size (Mac OS) or to the size of the window of the application (Windows). In this view, the word processing menu bar temporarily replaces the DVMAX main menu bar.

Viewing Options for Documents, Menus and Toolbars

The **View** menu provides several options for how you view documents, menus and toolbars.

View Document Layout

You can have the word processor display your document on the screen. In either Normal or Page mode.

- From the **View** drop-down menu, select **Normal** to display the document as an uninterrupted series of paragraphs without columns, headers or footers. When this mode is selected, a checkmark appears next to the **Normal** option on the **View** menu.

- From the **View** drop-down menu, select **Page** to display the document as a succession of separate pages, and display text columns. When this mode is selected, a checkmark appears next to the **Page** option on the **View** menu.
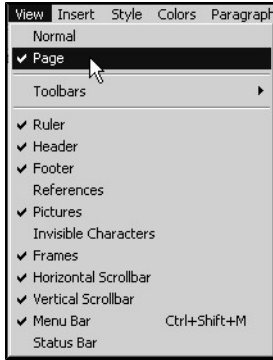
View or Hide Toolbars

Selecting the **Toolbars** option on the **View** menu displays a list of available toolbars.

- From the **View** drop-down menu, choose a toolbar from the **Toolbars** list. The toolbar will be displayed below or above the Ruler on the word processing window (depending on which toolbar you choose) and a checkmark will appear beside the name of the selected toolbar on the **Toolbar** submenu.

- Click again to hide the toolbar.

- See *About Toolbars* for information about each toolbar.
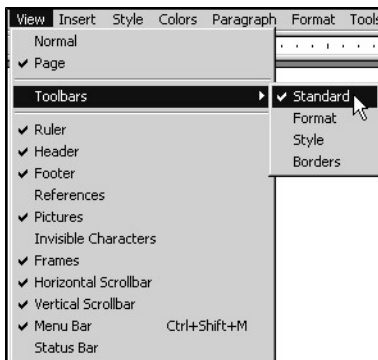
View or Hide Rulers

- From the **View** drop-down menu, select **Rulers** display the rulers. This is the default setting. When rulers are displayed, a checkmark shows next to the **Rulers** option on the **View** menu.

- Click again to hide the rulers.
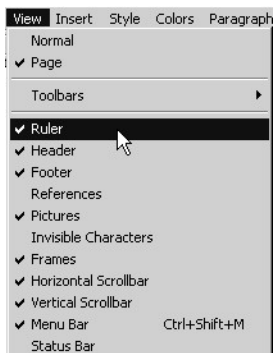
ℹ️ When **Page** view is selected, both horizontal and vertical rulers are displayed on the document screen. When **Normal** view is selected, only the horizontal ruler shows.

View or Hide Headers and Footers

- When in **Page** view, selecting the **Header** option from the **View** menu displays the document header area at the top of the current page (see *Documents, Headers and Footers*. When in **Normal** view, the **Header** option is not available, since **Normal** view cannot display the header area.

- When in **Page** view, selecting the **Footer** option from the **View** menu displays the document footer area at the bottom of the current page (see *Documents, Headers and Footers*. When in **Normal** view, the **Footer** option is not available, since **Normal** view cannot display the footer area. See also *Format a Document* and *Document Preferences and Page Setup* for more on headers and footers.
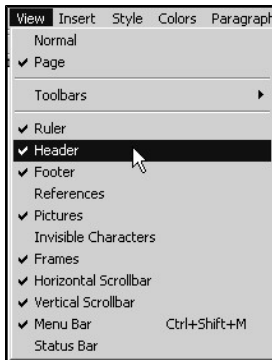
View or Hide References

By default, the computed values of references in a document are displayed. For example, if there is a client name reference inserted in your document, you will usually only see the actual name of the client associated with the record in which you are working. However, when you choose to view references, you will see the reference value, such as [Client Name]. See *Inserting References* for more on working with references.

- From the **View** drop-down menu, select **References** to display the values of the references within the current document. When **References** is selected, a checkmark appears before the **References** option on the **View** menu.
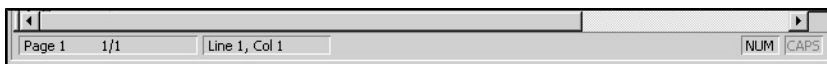
- Click again to deselect and display only the computed values of the references.
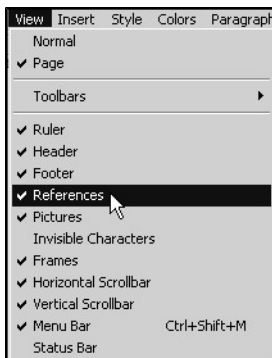
View or Hide Pictures

- From the **View** drop-down menu, select **Pictures** to display any pictures that may be in your document. When **Pictures** is selected, a checkmark appears before the **Pictures** option on the **View** menu.

- Click again to deselect. When **Pictures** is not selected, the document will display frames instead of pictures. This makes the display faster.

View or Hide Invisible Characters

- From the **View** drop-down menu, select **Invisible Characters** to display invisible characters, such as paragraph markers, page breaks and tabs. When **Invisible Characters** is selected, a checkmark appears before the **Invisible Characters** option on the **View** menu.

- Click again to deselect and hide invisibles.

View or Hide Frames

View **Frames** will show you the margins and borders of the document, footer and header areas, as well as any other place in the document where frames are in use.

- From the **View** drop-down menu, select **Frames** to display any frames that may be in your document. When **Frames** is selected, a checkmark appears before the **Frames** option on the **View** menu.

- Click again to deselect and hide frames.

View or Hide Scrollbars

- From the **View** drop-down menu, selecting **Horizontal** or **Vertical Scrollbar** displays the selected scrollbar. When **Horizontal** or **Vertical Scrollbar** is selected, a checkmark appears before the **Scrollbar** option on the **View** menu.

- Click again to deselect and hide the scrollbar.

View or Hide the Word Processing Menu Bar

- From the **View** drop-down menu, select **Menu Bar**. This displays the Word Processing menu bar. When **Menu Bar** is selected, a checkmark appears before the **Menu Bar** option on the **View** menu.

- Click again to deselect and hide the menu bar. When the menu bar is hidden, you can display it again either from the View menu or by pressing CTRL+SHIFT+M (Windows) or COMMAND+SHIFT+M (Mac OS).

View or Hide the Status Bar

The status bar is located at the bottom of the word processing document window. It includes information such as page, line and column numbers in relation to the position of the cursor in the document.

- From the **View** drop-down menu, select **Status Bar**. This displays the status bar at the bottom of the document. When **Status Bar** is selected, a checkmark appears before the **Status Bar** option on the **View** menu.
- Click again to deselect and hide the status bar.

Documents, Headers and Footers

Each word processing document is divided in to 3 main parts: the header, the footer and the main body of the document.

About Headers

Material that is printed at the top of each page, such as the document title or company logo, is known as the header. You must be in **Page** view to see the header. You can control when the header is printed from **Preferences** under the **File** menu on the Word Processing menu bar, located above the text area. See *Viewing Options for Documents, Menus and Toolbars* and *Format a Document* for more information on headers. You do not have to use a header in a document. Use the vertical ruler to adjust the upper and lower margins of the header.

About Footers

Material that appears at the bottom of each page of a document, such as the page number, is known as the Footer. You can control when the footer is printed from **Preferences** under the **File** menu on the Word Processing menu bar, located above the text area. You must be in **Page** view to see the footer. See *Viewing Options for Documents, Menus and Toolbars* and *Format a Document* for more information on footers. You do not have to use a footer in a document. Use the vertical ruler to adjust the upper and lower margins of the footer.

About the Main Body of a Document

The main body is the core part of the document, such as the letter portion of a client Welcome letter. The practice or clinic letterhead is typically located in the Header area.

Create a New Document

DVMAX allows you to create a single document, created exclusively for a specific client, patient or referral source record, or build a template or form letter. A form letter lets you send the same letter or reminder to a large number of recipients, while customizing details like client name, address, patient name or reminder items.

The process of creating a document is the same, regardless of whether you intend to use the letter for a mass mailing, or want to send only a single note. Depending on how you save the document, it will be saved as either a template (such as a Protected Document) or a document specific to the record in which you are working (Case Document). Most documents you work with in DVMAX will be templates, in that they will not be written for a single client or patient but can be used by any client or patient in the database.

The following steps provide an overview of the process used to create a document. Refer to the specified sections for further detail on a particular step.

To create a new document:

- From a client record, select the **Word Processing** tab or choose **Word Processing** from the **Client** drop-down menu.
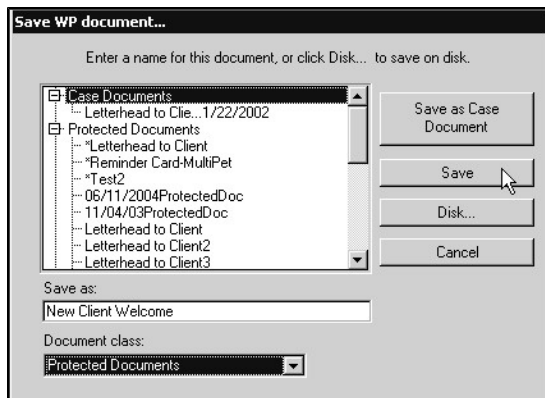
-OR-

- From a patient record, select the **Word Processing** tab, or choose **Word Processing** from the **Patient** drop-down menu.

-OR-

- From a referral source record select **Word Processing** from the **Referral Source** drop-down menu.

- From the **File** drop-down menu on the Word Processing menu bar (above the white text area), select **New**.
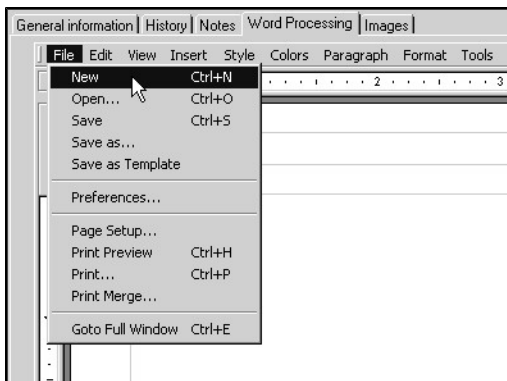
- Add text to the main body of the document. This can include typing text as well as the insertion of references from the **WP Palette** menu. See *Inserting References* for more detail.

- Make changes as needed to fonts, margins, styles or other formats. See *Format a Document*.

- Add a header and footer if needed. See *Format a Document*.

- Choose **Save As** from the **File** drop-down menu to save your document.

- From the Save WP Document window, type a name for your document.

- From the **Document Class** drop-down menu, select the type of document you have created. See *Document Class* under *Save a Document*.

- Click **Save** or **Save as Case Document** (depending on what type of document you are creating) to save the file to the database, or choose **Disk** to save the file to disk. See *Saving a Document* for more.

⚠️ Before saving your document, make sure you understand the document class and save to disk options. See the section Save a Document for more information on this important issue.

Open an Existing Document

To open an existing document:

- From a client record, select the **Word Processing** tab or choose **Word Processing** from the **Client** drop-down menu.

-OR-

- From a patient record, select the **Word Processing** tab, or choose **Word Processing** from the **Patient** drop-down menu.

-OR-

- From a referral source record select **Word Processing** from the **Referral Source** drop-down menu.

- From the list of documents on the Word Processing window bar, click to select a document, then select **Open**, or double click on a document to open.
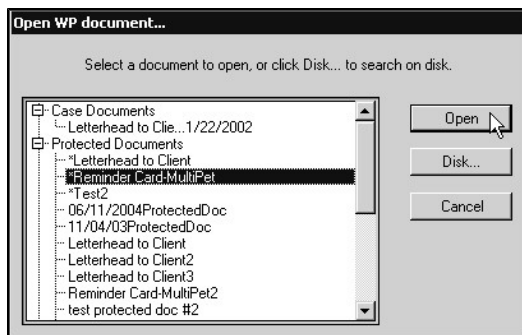
Open a Document on Disk

To open a document located on a disk drive, USB drive, or other similar media:

- From the Word Processing tab, choose **Disk**.
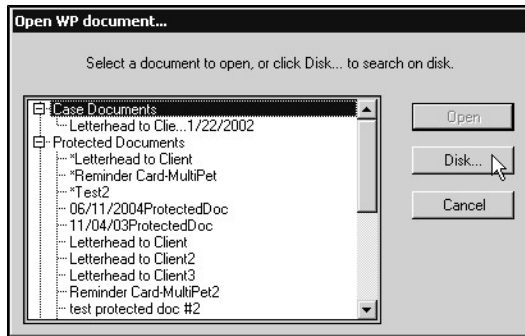
- From the Import window, select the document you want to import and click **Open**.

-OR-

- From the Import window, double click on the document you want to open.

Edit a Document

You can make changes to any type of document, regardless of the Document Class. Then, you can choose to save the document under a new file name or under the same file name and document class, replacing the older version. You can use any of the formatting features to add to a document or delete sections of a document.
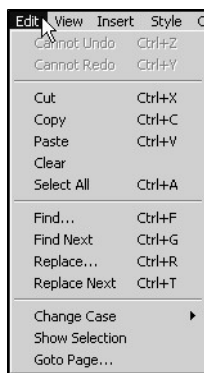
The **Edit** menu on the Word Processing menu bar contains several options that are useful for editing, moving and replacing parts of a document. The **Edit** menu options are described in general below and should be familiar to those who have worked with other word processing applications.

Undo Action – Word Processing

Selecting **Undo Action** from the **Edit** menu reverses your last action on the document. If the last action cannot be undone, the **Undo Action** option becomes **Cannot Undo Action**. The **Cannot Undo Action** menu option cannot be selected and does not perform an action.

Redo Action – Word Processing

Selecting **Redo Action** from the **Edit** menu repeats the last action you cancelled on the document. If the last action cannot be repeated, the **Redo Action** option becomes **Cannot Redo Action**. The **Cannot Undo Action** menu option cannot be selected and does not perform an action.

Cut – Word Processing

Selecting **Cut** from the **Edit** menu deletes the current selection and places it in the clipboard.

Copy – Word Processing

Selecting **Copy** from the **Edit** menu copies the current selection and places it in the clipboard.

Paste – Word Processing

Selecting **Paste** from the **Edit** menu inserts a copy of the contents of the clipboard at the location of the insertion point (where you place the cursor), or replaces a selection (such as a selected paragraph) with the contents of the clipboard if anything is selected. Use this in conjunction with the **Cut** and **Copy** functions to move, copy or remove sections of text.

If the contents of the clipboard are an image, DVMAX will display a Paste Picture window. This window lets you to choose where the picture will be pasted.

Delete – Word Processing

Selecting **Delete** from the **Edit** menu deletes the current selection.

Select All – Word Processing

Choosing **Select All** from the **Edit** menu selects all of the elements present in the area being edited (characters, tables and pictures).

If **Page** view is selected, and the cursor is located in either the header or footer area, only the contents of that area will be selected.

Find – Word Processing

Selecting **Find** from the **Edit** menu opens the Find window. The Find function is used to search the current document for specified characters, styles, borders, or formatting.

To search for specified text or characters in your document:

- From the **Edit** drop-down menu, select **Find**.

- In the Find window, type the character or text you want to find in the **Find** box. Use the additional style options to conduct style, border or format searches.

- Click **Find**. The first instance in the document that matches the search parameters will be returned.
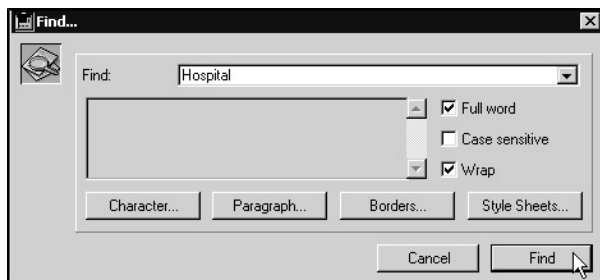
Find Next – Word Processing

Selecting **Find Next** triggers a search based on the last character or format search you performed. See *Find* for more on running a search.

Replace – Word Processing

Selecting **Replace** from the **Edit** menu opens the Replace window. The Replace function lets you locate and replace specified text, characters, styles and more.   It is similar to the Find function, except that in addition to finding characters, text, formats or styles, you can replace those instances with new text.

To search and replace text or characters in your document:

- From the **Edit** drop-down menu, select **Replace**.

- In the Replace window, type the character or text you want to find and replace in the **Replace** box. Use the additional style options to conduct style, border or format searches.

- In the **With** box, type the character or text you want to use to replace the existing text. Use the additional style options to set style, border or format options for the new text.

- Click **Replace** or **Replace All**.
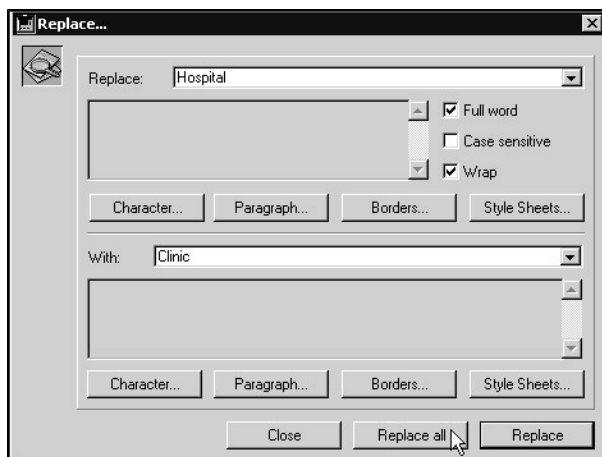
Replace Next – Word Processing

Selecting **Replace Next** triggers a find and replace based on the last character or format search you performed. See *Replace* for more on running a search.

Saving a Word Processing Document

DVMAX allows you 2 options when saving documents: **Save** or **Save As**. As well, you can choose to save the document either to the database, so that all workstations may access the document, or save the file to disk.

If you are not sure if you should select **Save** or **Save As**, choose the **Save As** command and follow the steps outlined under **Save As**. The **Save As** command will always prompt you with a

message in a Confirm window if you are about to overwrite an existing file with the current document.

Save – Word Processing Option

Selecting **Save** saves the current document at its current location. Use this option if you are saving changes to an existing document, using the same file name and **Document Class** settings (see *Document Class*). If you are saving a new document, selecting **Save** behaves like **Save As**, and a Save WP Document window opens. You will need to choose a file name and a Document Class. To save a new version of an existing document (separate from the original) or to save a file to disk, choose **Save As**.

To save a document using **Save**:

- From the **File** drop-down menu, choose **Save**.
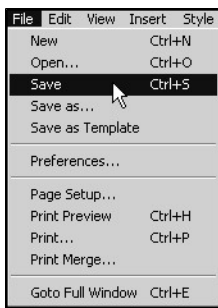
- The current document will be saved, overwriting the existing file. No further message is displayed.

If you use the **Save** command to save a Protected Document, the Save WP Document window opens, and DVMAX defaults the **Document Class** to Case Document in order to prevent accidental overwriting of Protected Documents. See Overwriting Protected Documents for more information.

Save As – Word Processing Option

Selecting **Save As** opens the Save WP Document window.   Use this option if you are saving a new document, saving a Protected Document or saving an existing document under another name.

To save a document using **Save As**:

- From the **File** drop-down menu, choose **Save As**.
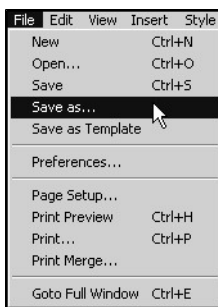
- On the Save WP Document window, type a name for the document. Select **Disk** to save the file to disk. See also, *Saving to Disk*.

ⓘ Placing an asterisk (*) before the name of a document will automatically make the document a Protected Document. Protected Documents named with an asterisk will appear at the top of the list of Protected Documents. If you are overwriting an older version of protected document whose file name contained an asterisk, make sure the asterisk is included in the new file name. DVMAX automatically removes this asterisk to prevent accidental overwriting of protected documents.

ⓘ Double clicking on the original protected document name in the document list will ensure that both of the documents (old and new) will have the same name.

- From the **Document Class** drop-down list, choose a document class. For more information, see *Document Class*.
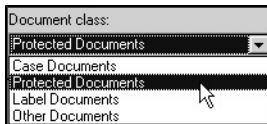
- Click **Save** to save the document to the database. Files saved as Protected Documents, Label Documents or Other Documents will be available from any record of the same type in the database. For example, if you save a Label Document from a client record, it will be available from any other client record.
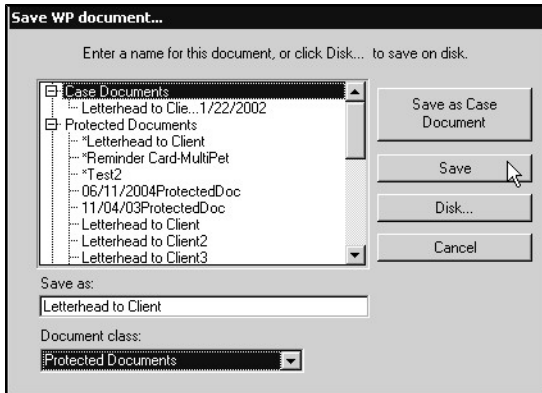
-OR-

- Click **Save As Case Document**. This will save the file as a Case Document, regardless of what you selected from the **Document Class** list. As Case Document is only available from the record in which it was created.
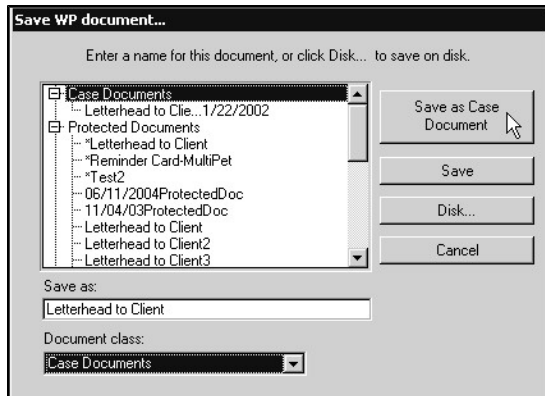
⚠️ If you choose to use the same name and Document Class as the original file, you will over-write the original file with the current document. This is true for documents from all Document Classes. See Document Class for more information.

Document Class in Word Processing

The **Document Class** drop-down list from the Save WP Document window allows you to select the type of document you want to save. The class you select from determines how the document is stored. DVMAX provides 4 document classes: **Case Documents**, **Protected Documents**, **Label Documents** and **Other Documents**.

Case Documents in Word Processing

Case Documents are specific to a selected client, patient or referral source record and are only available from the record in which they were created. When you save a document, DVMAX defaults to Case Document as the document class. If you have created a form letter, label or other template that you would like to make available from any client, patient or referral source record, you must save the document as either a **Protected**, **Label** or **Other** document class.

Save as a **Case Document** when:

- The document you are saving is only intended for the record in which you are working, save it as a **Case Document**.

- **Do not** save it as a Case Document if you intend to use the document as a template to create form letters, reminder card or similar documents, see *Protected Documents*, *Label Documents* and *Other Documents*.

⚠️ When you save a document as a **Case Document**, any reference values that may be inserted in the document are replaced with the computed reference (actual data from a record) and cannot be reversed.

Protected Documents in Word Processing

Protected Documents are templates, meaning they are not written for use by just one client or patient but can be used by any client or patient in the database. Unlike Case Documents, these types of documents contain references inserted using DVMAX's **WP** menu. These references will automatically pull in the appropriate information from a record and display it in the document, customizing the document for each reader while allowing you to leave the body of the letter or other document the same. See *Using Templates* for more on templates.

When you save a new document as a **Protected Document**, it stores that document in a **Protected Documents** directory and prevents you from accidentally overwriting the template using a series of security measures. This is especially useful if your practice keeps a variety of forms on file and uses them to generate documents such as referral letters.

If you make changes to a protected document and then choose **Save** or **Save As**, the document class will default to **Case**, keeping the template from being overwritten. To overwrite the existing **Protected Document**, you must make sure the file has the same name as the original document and then choose **Protected Document** from the **Document Class** drop-down menu. DVMAX then confirms that you intend to overwrite the protected document. See *Overwriting Protected Documents* for more information.

Save as a **Protected Document** when:

- The document can be used as a template for creating form letters, reminder cards, referral letters and similar documents.

- The document you are saving is a key template used in generating letters, reminders or similar material in your practice. Templates can also be stored under **Label Documents** or **Other Documents**, but the Protected Documents designation offers extra default security settings to prevent accidental overwriting for core templates.

- You want to access the template from any record that is of the same type as the record in which it was created. For example, a Protected Document created in a client record can be accessed from any other client record.

- Consider using **Label Documents** if this is a template used for creating labels. This may help you organize your template documents more efficiently.

- Consider using **Other Documents** if this template is not among the documents you use heavily, or if you want a way to further organize your special template files.

- If the document is not a template, see **Case Documents**.

Label Documents in Word Processing

Label Documents are templates you create for use in generating custom labels. They are similar to **Protected Documents** in that they are templates that can be used by any client or patient in the database. When you choose **Label Documents** from the **Document Class** menu, the document will be saved under the **Label Documents** directory. This helps sort regular **Protected Documents**, like letters and reminders, from templates used for generating labels.

When you save an existing Label document, the default **Document Class** is **Label Documents**. If you try to overwrite an existing **Label Document**, you will be asked to confirm that you want to overwrite the file.

Save as a Label Document when:

- The document can be used as a template for creating labels.

- Consider using **Label Documents** if this is a template used for creating labels. This may help you organize your template documents more efficiently.

- You can also save label templates under **Protected Documents** and **Other Documents**.

- If the document is not a template, see **Case Documents**.

Other Documents in Word Processing

Other Documents are also types of templates or forms. You can use this document class to save templates that may not be part of your main list of client, patient or referral letters, or if you want to keep certain types of templates in a separate directory.

When you replace an existing Other document with a more current version (using **Save As**) the default **Document Class** will be **Other Documents**. If you try to overwrite an existing **Other Document**, you will be asked to confirm that you want to overwrite the file.

- The document can be used as a template for creating form letters, reminder cards, referral letters and similar documents.

- You want to further organize your template documents in to different directories.

- The document is a template that is not part of your core or heavily used templates. Consider saving your core templates as **Protected Documents**.

- Consider using **Label Documents** if this is a template used for creating labels. This may help you organize your template documents more efficiently.

- If the document is not a template, see **Case Documents**.

Save As Template Option in Word Processing

Under the File menu on the Word Processing menu bar there is a Save as Template command. DVMAX uses a special naming system for document types. Document templates can be saved as one of three **Document Classes**: Protected, Label and Other Documents. You must use one of these options when saving a template. See *Document Class*.

Overwriting Protected Documents in Word Processing

Protected Documents are template documents used for creating letters, reminder cards and similar documents. They are typically considered part of your core or most heavily used templates, and it is important to take care not to accidentally overwrite those documents.

To help prevent accidental overwriting, DVMAX provides some default settings that are selected on the Save WP Document window when you try to overwrite a Protected Document.

To overwrite a Protected Document:

- From the **File** menu, click **Save** or **Save As**.
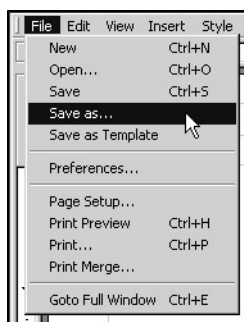
- If you chose **Save** from the File menu, DVMAX provides a note in red font on the Save WP Document window indicating that the Document Class was changed to **Case Document**.
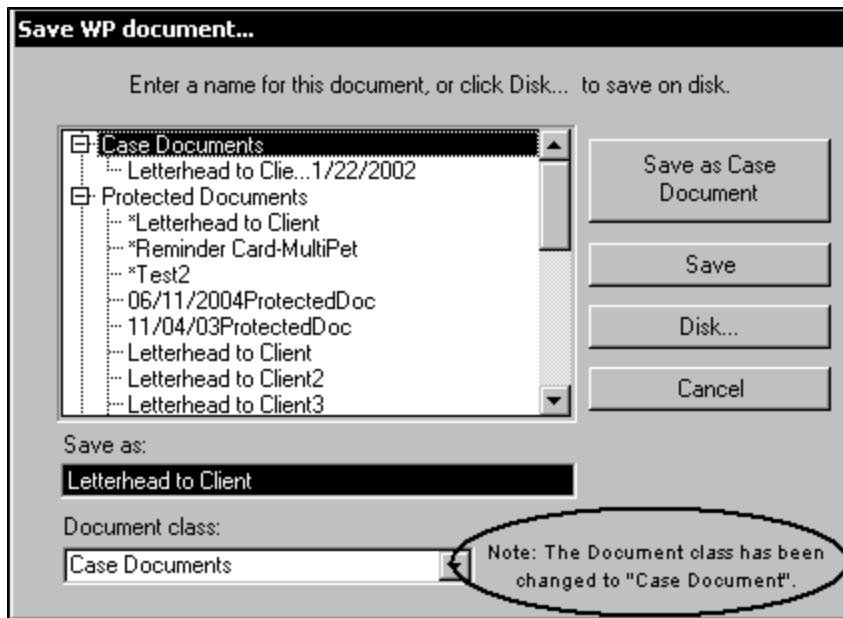
- If you select **Save As**, the **Document Class** defaults to Case Document, but no notice in red font is provided on the Save WP Document window.
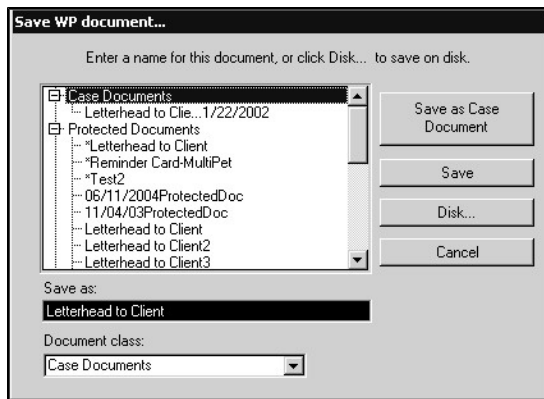

- To overwrite the current Protected Document, do not change the document name in the **Save As** box. If the current Protected Document begins with an asterisk (*), make sure the document name in the **Save As** field also contains an asterisk (*) if you plan to overwrite.

- If you want to create a new protected document, type a new name for the file in the **Save As** box.

- To save the document as a Protected Document, choose **Protected Document** from the **Document Class** drop-down menu. This is essential if you want to overwrite the original protected document. Otherwise, the current document will be saved as a Case Document, while the original Protected Document will remain unchanged in the Protected Documents directory.
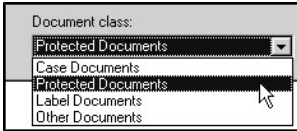
- Click **Save**.
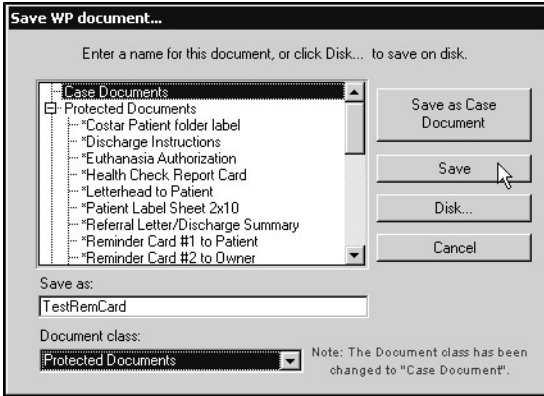
- A Confirm window opens.

- From the Confirm window, choose **Overwrite** to replace the previous version of the Protected Document with the current Protected Document.

- Click **Re-enter** if you would prefer to give the document a different name. This will take you back to the **Save a WP Document** window.
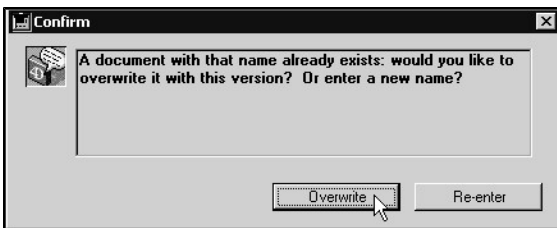
Saving a Word Processing Document to Disk

To save a document to disk:

- From the Save WP Document window, click **Disk**.
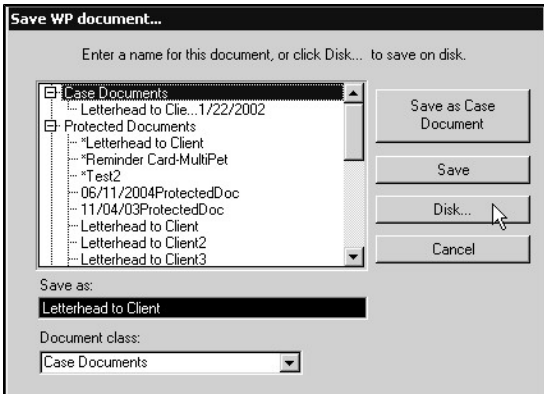
- On the Export window, select the location where you would like to save the file.

- In the **File Name** box, type a name for the document.

- Click **Save**.

🛈 Documents saved this way are only accessible on the workstation or media (such as disk or CD) on which they have been saved.

Freeze a Word Processing Document

See *The Tools Menu*.

Close a Word Processing Document

To close a Word Processing document:

- Use the **Save** or **Save As** command from the File menu to save the document first, as needed. If you leave the document page without saving, any changes you made will be lost.

- You may then either use the **Open** command to open a new or existing document.

- If you want to exit WP, click **Cancel** at the bottom of the WP window

- The current document automatically closes.

Print or Preview a Word Processing Document

You can print or preview documents you have created. As well, you can use the **Print** and **Print Merge** functions to print a copy of the current document for a selected set of records.

Print a Word Processing Document

To print a document:

- From the **File** drop-down menu, select **Print**.
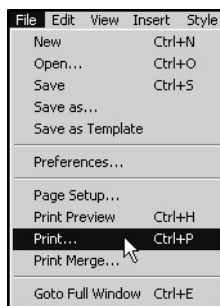
- From the Print window, make any adjustments needed, such as print quantity and print quality.

- On the Print window, click **Print**.
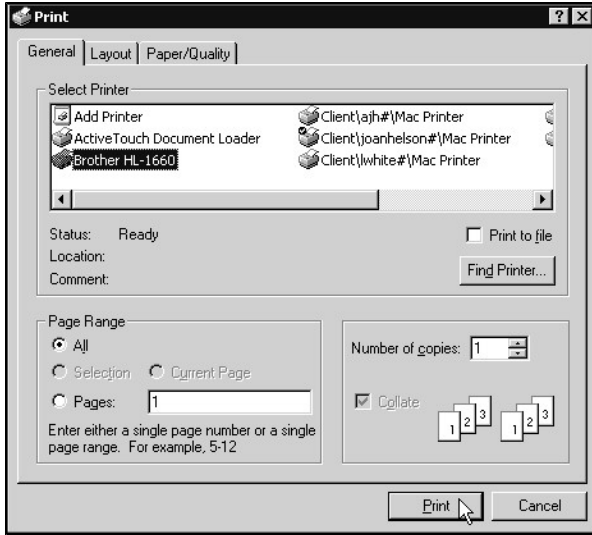
Print Preview a Document in Word Processing

To preview the document:

- From the **File** drop-down menu, select **Print Preview**.
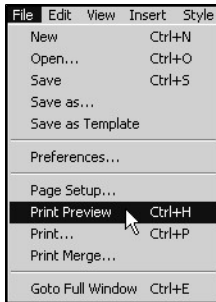
- The Print Preview window opens. The Preview window displays the document as it will be printed. It also allows you to start or cancel the printing.
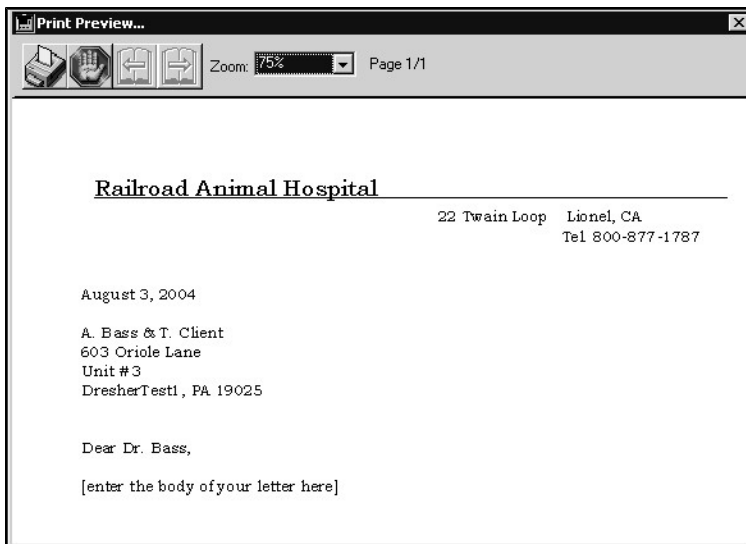
Print Merge Option in Word Processing

The **Print Merge** function can be used when you want to perform a large mail out, such as mailing Welcome letters or reminder cards. To use this function, you must first have a selection of client, patient or referral source records for which you plan to generate letters or reminders. For example, you may want to send a personalized Welcome letter to a selection of new clients.

To print a copy of the current document for each record in your selection of records:

- Make sure you have generated a list of clients, patients or referral sources to whom you would like to send a personalized copy of the current document.
- From the **File** menu on the Word Processing menu bar, select **Print Merge**.
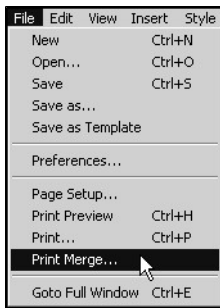
- From the Print window, make any adjustments needed, such as print quantity and print quality.
- On the Print window, click **Print**.
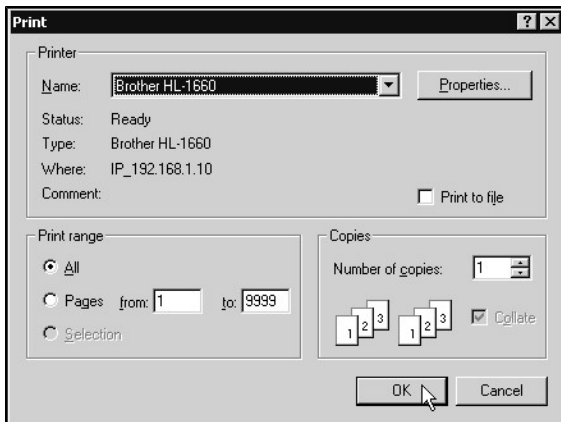
Format a Word Processing Document

There are a large number of formatting options available when creating a document. Most of these options will be familiar to you if you have experience with any major word processing application. The formatting options are described in general below. See also, *Document Preferences and Page Setup.*

Many of the formatting options can be accessed from both the toolbars (see *About the Toolbars*) and from the drop-down menus on the Word Processing menu bar.

ⓘ Document formatting options can usually be applied to selected text, entire paragraphs; or they can be applied to the full header, footer or body of a document. This means that formatting

options such as font, alignment, margins and tabs can change throughout a document depending on the sections to which you choose to apply the attributes. See Using Paragraph-Base Formatting.

Selecting Paragraphs in Word Processing

- To select a single paragraph, click anywhere in the paragraph.

- To select several paragraphs, drag through the paragraphs to select them.

- To select every paragraph in the body of a document, choose **Select All** from the **Edit** drop-down menu.

Adjusting the Font Style, Size and Other Text Attributes

You can customize the font or fonts you want to use in your document. You can adjust font, size, color, style and other text attributes. There are font and text attribute buttons located on the **Style** toolbar, as well as **Format**, **Style** and **Colors** menu options that you can use to select attributes.

Selecting a Font

All fonts available for use in your document can be viewed from the **Format** drop-down menu. If the **Style** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can select a font from the drop-down list on the toolbar.

To select or change a font:

- Select the text you want to change, or click where you want to type text using a new font.

- From the Font list on the **Style** toolbar, select a font.

-OR-
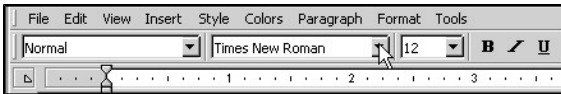
- From the **Format** drop-down menu, choose **Character**.
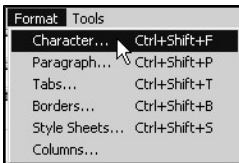
- From the **Font** list on the Character window, select a font.
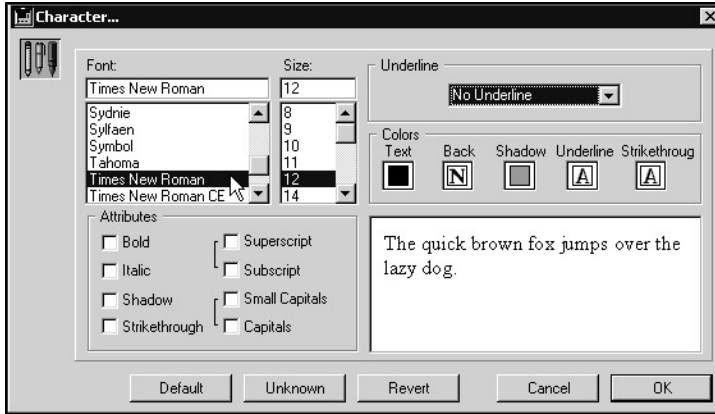
- Click **OK** from the Character window to apply the font selection.

Choosing Font Size

Text size is measured in points. A point is approximately 1/72 of an inch. The font size drop-down list shows sizes ranging from 8 to 72 points. Text size can be adjusted from the **Format** drop-down menu. If the **Style** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can select a text size from the drop-down list on the toolbar.

To select or change a font:

- Select the text you want to resize, or click where you want to type using a different size text.

- From the font size list on the **Style** toolbar, select a font.

-OR-
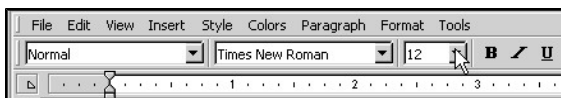
- From the **Format** drop-down menu, choose **Character**.
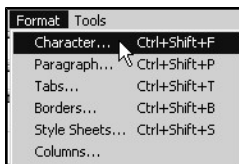
- From the **Size** list on the Character window, select a font size.
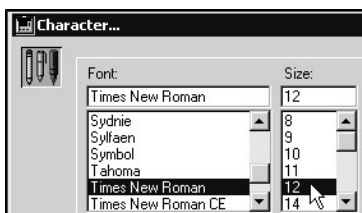
- Click **OK** from the Character window to apply the font size.

ⓘ You can directly type a size value in the size box if you would like to assign a size that is not shown on the drop-down list. The size must be between 1 and 255.

Choosing a Font Style

Font styles can be used to emphasize or enhance the appearance of text in your document. Common examples of font styles are **Bold**, Underline and *Italics*. Font style can be adjusted from the **Format** or **Style** drop-down menus. If the **Style** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can select a style using the style buttons on the toolbar.

To select or change a font style:

- Select the text you want to appear in a different style, or click where you want to type using a different style.

- From the font style buttons on the **Style** toolbar, select a style. Note you can only select **Bold**, **Underline** or **Italics** from the toolbar. To choose other options, use the **Format** menu.

-OR-

- From the **Style** drop-down menu, select a style.

-OR-

- From the **Format** menu, choose **Character**.
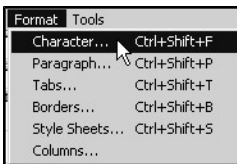
- From the Character window, select a style from the Attributes area. If you select Underline, use the **Underline** drop-down menu to choose an underline style.
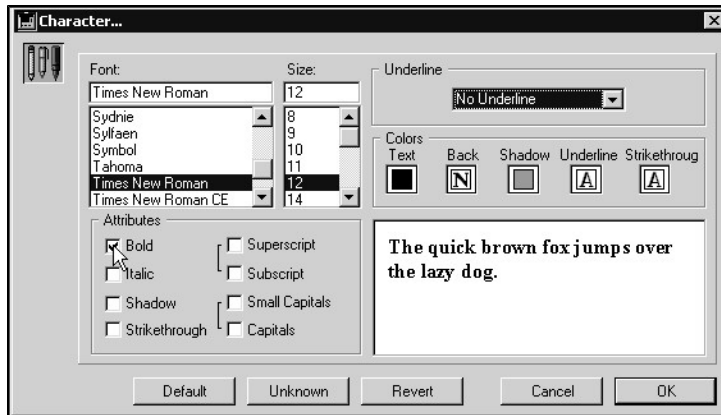
- Click **OK** from the Character window to apply the style.

Changing Several Text Attributes at Once

If you have several changes to make to the attributes of a selection of text, you can make those changes from a single menu. The Character window, which opens when you select **Character** from the **Format** menu, lets you adjust font, size, style, color and underline style. It also lets you preview the changes you are making before you apply them to the selected text.

To make changes to several attributes at once:

- Select the text you want to change, or click where you want to type using selected attributes.

- From the **Format** menu, choose **Character**.
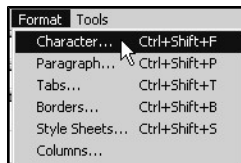
- From the Character window, select a font type, text size, font color and style.

- Click **OK** from the Character window to apply the attributes.

Aligning Text

You can align text with the left or right margin of a document, center text between the left and right margins, or justify the text so it is aligned with both the left and right margins. Text alignment can be adjusted from the **Format** or **Paragraph** drop-down menus. If the **Format** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can select an alignment using the buttons on the toolbar.

The alignment will apply to the paragraph or paragraphs you select. The default value is left justified.

- To align text to the left, select the **Left Align** icon from the **Format** toolbar, or choose **Align Left** from the **Paragraph** drop-down menu.
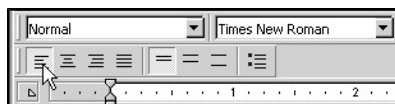
- To align text to the right, select the **Left Right** icon from the **Format** toolbar, or choose **Align Right** from the **Paragraph** drop-down menu.
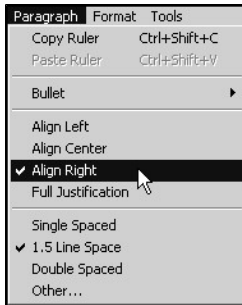

- To center text between the left and right margins, select the **Align Center** icon from the **Format** toolbar, or choose **Align Center** from the **Paragraph** drop-down menu.

- To apply full justification, select the **Full Justification** icon from the **Format** toolbar, or choose **Full Justification** from the **Paragraph** drop-down menu.

ⓘ You can also access the justification attributes from the **Format** drop-down menu. If you are making several changes to a paragraph (alignment, line spacing, bullets and indentation) select **Paragraph** from the **Format** menu.

Creating Bullets in a Word Processing Document

You can add bullets to your document from three different places in the Word Processing facility. Bullets can be added from the **Format** or **Paragraph** drop-down menus. If the **Format** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can add bullets using the **Bullet** icon on the toolbar.

Bulleted text formatting will be applied to all selected paragraphs. To add bullets:

- Click the **Bullet** icon from the **Format** toolbar. This will create bulleted text using the default bullet selection. Use the **Paragraph** drop-down menu to select a different bullet style.
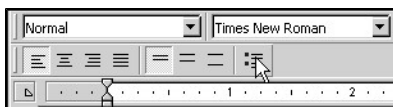
-OR-

- From the **Paragraph** drop-down menu, select **Bullet**; then select a bullet style from the **Bullet** drop-down list.
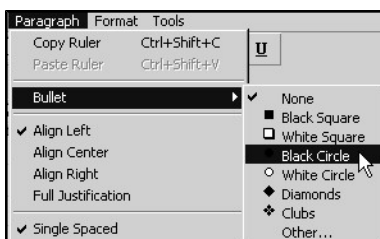
- To select a custom bullet style, choose **Other** from the Bullet list. From the Special Character window, choose a bullet character.

ℹ️ You can also add bullets from the **Format** drop-down menu. If you are making several changes to a paragraph (bullets, alignment, line spacing and indentation), select **Paragraph** from the **Format** menu.

Setting Line Spacing

You can set the line spacing used between lines within a paragraph. Line spacing can be adjusted from the **Format** or **Paragraph** drop-down menus. If the **Format** toolbar is displayed (see *Viewing Options for Documents, Menus and Toolbars*), you can set the line spacing using the line spacing buttons on the toolbar.

The spacing will apply to the paragraph or paragraphs you select. The default value is single-spaced. To adjust line spacing:

- To apply single spacing, select the **Single Spaced** icon from the **Format** toolbar, or choose **Single Spaced** from the **Paragraph** drop-down menu.
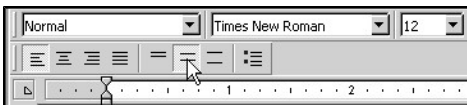
- To apply double spacing, select the **Double Spaced** icon from the **Format** toolbar, or choose **Double Spaced** from the **Paragraph** drop-down menu.

- To apply one and one half (1.5) line spacing, select the **1.5 Line Space** icon from the **Format** toolbar, or choose **1.5 Line Space** from the **Paragraph** drop-down menu.

- To apply custom line spacing, select **Other** from the **Paragraph** drop-down menu. From the Other Line Spacing window, type a value for the line spacing in the **Size** box. As with any line spacing selection, the line spacing you type will be applied to the selected paragraphs.

ℹ️ You can also access the line spacing attributes from the **Format** drop-down menu. If you are making several changes to a paragraph (line spacing, alignment, bullets and indentation), select **Paragraph** from the **Format** menu.

Setting Margins and First Line Indent

You can use the Ruler to quickly and easily set the left and right margins for selected paragraphs. On the horizontal Ruler, grey triangles mark the left and right margins and first line indent. You may have several different margin settings in a single document. Select the paragraph to which you want to apply margin settings, then set the margins for that paragraph.

You can change the location of the left margin, the right margin, and the first line indent by dragging their markers to the left or right. All three markers move independently and you can position the left and right margins to within an inch apart. You can also adjust the upper and lower margins of the header, footer and main body of the document using the vertical Ruler.

Left and Right Paragraph Margins

The default margins for a new document are based on a standard 8.5 inch by 11 inch paper. Left and right margins are 1 inch (2.5 cm) from the edge of the page. You can adjust those values as long as you don't set them beyond the physical edges of your paper size. The Left and Right margin markers are represented by upward facing triangles located along the bottom edge of the Ruler.

To set the left or right margin using the Ruler:

- Select the paragraph or paragraphs to which you want to apply the margin settings.

- Drag the Left or Right margin marker to the desired position.

- Dotted lines display down the page as guides to help you align margins.
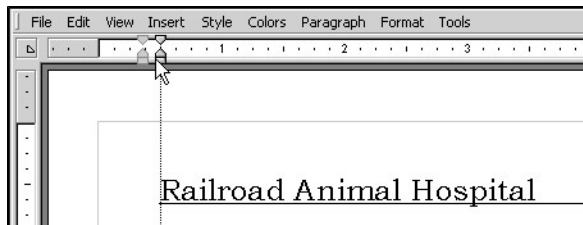
First Line Indent

The indent marker, represented on the by a downward facing triangle along the top edge of the Ruler, tells you where the first line of text in a selected paragraph will begin. If you do not want a first line indent, leave the indent marker in the same position as the left margin marker.

To set the first line indent:

- Select the paragraph or paragraphs to which you want to apply the first line indent setting.

- Drag the First Line Indent marker to the desired position.

- Dotted lines display down the page as guides to help you align margins.
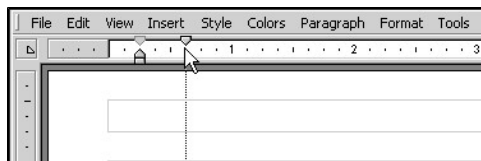
Adjusting the Top and Bottom Margins

You can use the vertical Ruler to adjust the upper and lower margins of the header, footer and main body of the document. To adjust the top and bottom margins:

- Position the cursor within the part of the document whose vertical margins you want to adjust. For example, if you want to adjust the upper and lower margins of the header, position the cursor in the header area.

- The vertical limits of the document, header or footer are displayed on the vertical ruler.

- Place the mouse cursor over the upper or lower limit of the area on the vertical ruler. The cursor becomes a double-sided arrow.

- Drag the upper or lower limit of the area to its new location. The footer, header or document area is then resized accordingly.

- See also, *Adding Headers and Footers* for more on adjusting vertical limits.

Tabs

Tabs allow you to line up blocks of text and numbers. Understanding how to set and adjust tabs is very useful, especially when creating new templates for reminder cards and other documents that can contain a variety of types of paragraphs. You can set different tab stops for different paragraphs.

About Tab Default Settings

By default, new documents are preset with tab stops every 0.5 inches across the page. You can use these tab stops even though they do not appear on the ruler. Press TAB to move the insertion point to the next tab stop. You can also set other tab stops anywhere along the ruler. The default spacing between tabs can be set from **Preferences** under the **File** drop-down menu.
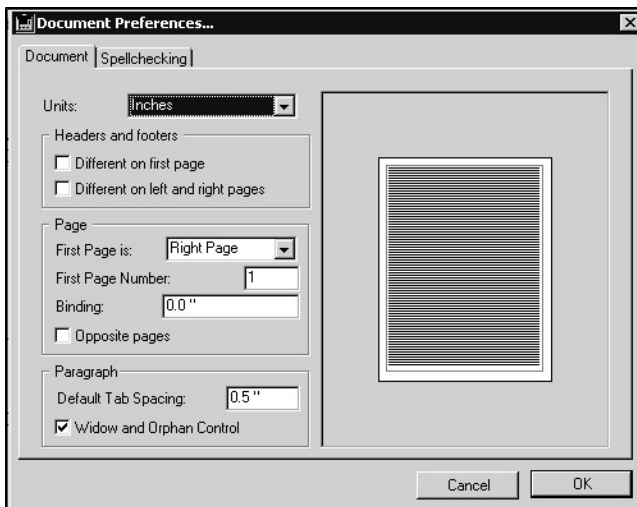
ℹ When you set a tab stop, any preset tab stops to the left of it are removed.
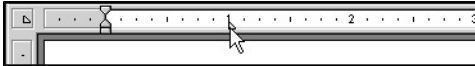
Creating Tabs Using the Ruler

You can set tabs easily using the Ruler, or define tabs from the **Tabs** option under the **Format** drop-down menu.

To set tabs using the Ruler:

- Select the paragraph or paragraphs to which you would like to apply the tab settings.

- Select the type of tab you want to use from the Tabs drop-down menu located on the left of the Ruler. There are 5 different tab stops.
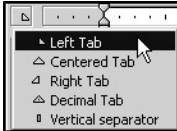
- Click in the Ruler to insert the tab stop. The tab stop is inserted where you click. You can modify its location by dragging it in the Ruler.

- To delete a tab marker, drag it anywhere below the Ruler.

Creating Tabs Using the Format Menu

To create tab stops using the Format menu:

- From the **Format** drop-down menu, select **Tabs**.
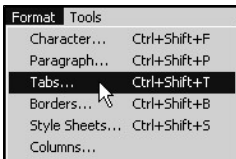
- A Tabs window opens. All tabs for the current paragraph are listed. Types of tab markers are listed under the Alignment area (see *Tab Types*). Types of fill characters are listed in the Leading area.

- Click **Add** to create a tab stop. This creates a new entry in the Tabs area. To delete a tab, select a tab from the Tabs area and click **Delete**.
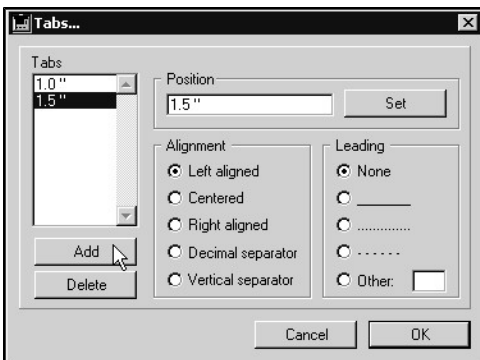
- Type a new position value in the **Position** box. The value will be in inches or centimeters, depending on the Document **Units** you selected under **Preferences**. The default is inches.

- Click **Set**. The new position for the tab is updated in the Tabs area.

- Select the alignment you want for the new tab from the Alignment list.

- If you want a lead line associated with your tab (such as the dotted lines leading to a page number in a Table of Contents), choose a leader style from the Leading list. The default value is **None**. Note that you can choose a custom fill type by clicking the **Other** and selecting the fill character you want.

- Click **OK**. The tab you added will appear on the Ruler.
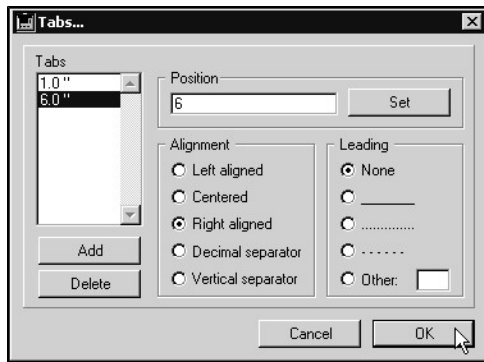
ⓘ Double click on the Ruler to display the Tabs window. The tab markers for the current Ruler are listed. Select the tab you want to modify from the list.

Tab Types

There are 5 tab options available in the word processing function:

Left-Aligned – Text typed after this tab stop will be left-aligned.

Right-Aligned – Text typed after this tab stop will be right-aligned.

Center-Aligned - Text typed after this tab stop will be center-aligned.

Decimal – Creates a decimal separator.

Vertical Separator – Similar to a left-aligned tab stop but a vertical separator is also displayed at its location. This is mainly used in tables.

Adding Headers and Footers

To add a header or footer to your document:

Choose **Page** from the **View** menu. Your document must be in **Page** mode to work with headers and footers.

- Type the text you want in the header or footer. In addition to text, you can add pictures, references or the current date or page number.

- To resize a header or footer, click in the Header or Footer area. The vertical limits of the area are displayed on the vertical ruler.

- Place the mouse cursor over the upper or lower limit of the area. The cursor becomes a double-sided arrow.

- Drag the upper or lower limit of the area to its new location. The footer or header area is then resized accordingly.
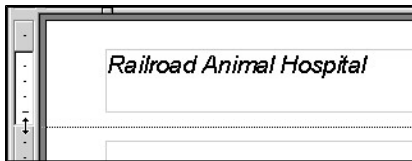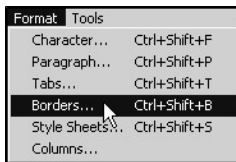

Borders and Frames

To apply a border:

- Select one or more paragraphs from the document.

- From the Borders toolbar, choose the location where you would like the border or frame to be placed around the selected text. You must use the **Format** menu to adjust the style of border or frame.

-OR-
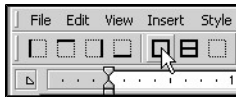
- From the **Format** drop-down menu, choose **Borders**.

- Choose the location where you would like the border or frame to be placed around the selected text.
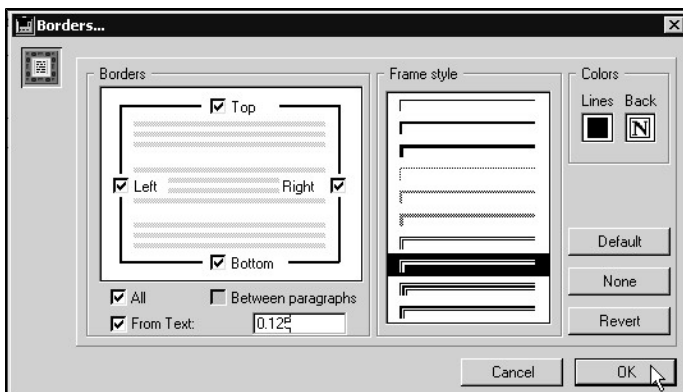
- Select the type and color of border or frame you would like from the Frame Style area of the Borders window.

- Click **OK** to apply the border or frame style.

Style Sheets

DVMAX lets you create, modify, import and apply style sheets to your document. You can apply existing style sheets using either the **Style** toolbar or the **Style Sheets** option from the **Format** menu

The Word Processing facility lets you create two types of style sheets: style sheets that apply only to characters and style sheets that apply to paragraphs. A character style sheet specifies a combination of attributes that can be applied to text. A paragraph style sheet lets you to set attributes for a paragraph, which includes the character formats, border settings, tab settings and paragraph settings.

To apply a style to a paragraph or character:

- Select the character(s) or paragraph(s) to which you would like to apply a style.

- Select a style from the style sheet list on the **Style** toolbar. If you want to add or edit styles, you will need to access style sheets from the **Format** menu.

-OR-

- From the **Format** menu, choose **Style Sheets**.
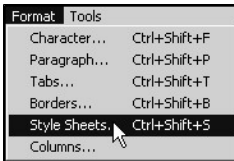
- From the **Style Sheet** menu, choose a style to apply to the current selection. The **Preview** area provides an example of the selected style.
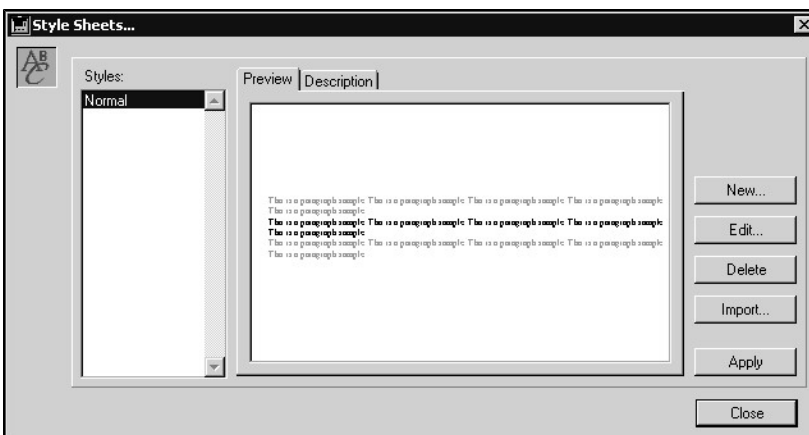
- Use the **New**, **Edit** or **Import** functions to create, modify or add style sheets.

- Select the **Description** tab on the Style Sheets window to see a summary of the formatting that is applied to the selected style sheet.

- Click **Apply** to apply the style to the paragraph or characters you have selected.

Creating Columns in Word Processing

To add columns to a document:

- Select **Columns** from the **Format** menu. A Columns window opens.

- From the Columns window allows, set the width, spacing and number of columns in the document.

- Click **OK** to apply the column formatting to the selected paragraphs.
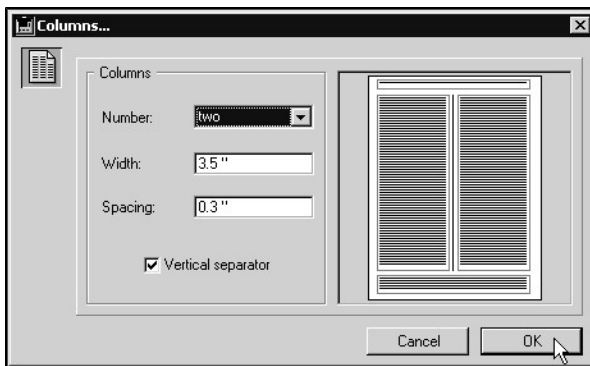
Copy Ruler

Using the **Copy Ruler** command from the **Paragraph** drop-down menu lets you copy all ruler settings from the currently selected paragraph (including tab type and location, first line indent, and margin settings) and apply them to any other paragraph(s) you select.
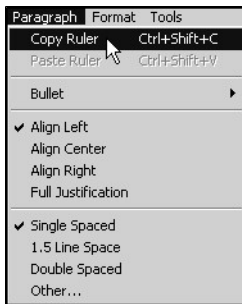
Inserting References

Most documents you will create using DVMAX's word processing function will be templates, meaning they will not be written for use for just one client or patient but can be used by any client or patient in the database. To create templates, you will use DVMAX's **WPPalette**.

The WP Palette

The **WPPalette**, accessed by clicking **Show Palette** from a Word Processing document, does not enter client- or patient-specific information directly, but instead enters a reference to the appropriate information. This dynamic reference will automatically pull in the appropriate information from the current record and display it in your document, customizing the document for each reader while allowing you to leave the body of the letter the same. For example, when you open a reminder document in a client record, it will automatically pull in the name of the current client and any other related information for which a reference exists on the template.

The references you can insert will vary depending on the type of record you are in when creating the document. While there is some overlap, **Clients**, **Patients** and **Referral Source** records each have their own set of references.

The WP Palette in a Client Record

The **WPPalette** in the context of a client record lets you insert information from a client record into your document, including client, patient and referral source data. See *Clients* in this user guide for details on the **WP** references available for documents created from a client record.

To insert a reference from the **WP Palette** in a client record:

- Click **Show Palette** to open the WP Fields Palette.

- Click where you want to insert the reference.

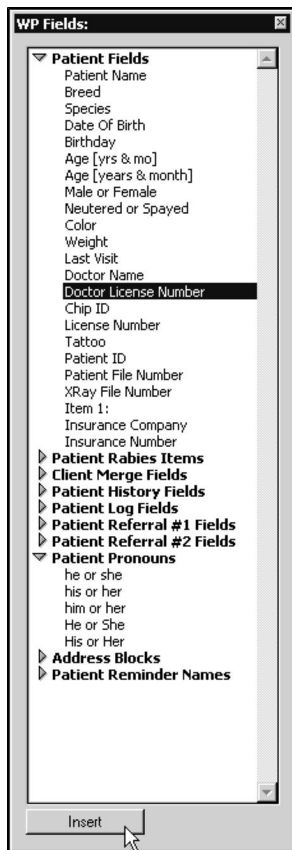- From the **WPPalette**, select an option and click **Insert**.
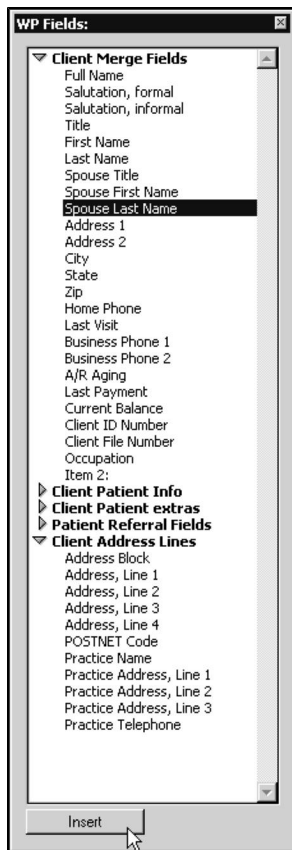
ⓘ Holding down the <Shift> key on your keyboard while inserting an item from the Word Processing Palette will capitalize the text you are inserting.

The WP Palette in a Patient Record

In a Patient record the **WPPalette**, accessed by clicking **Show Palette** from a Word Processing document, lets you insert information from a patient record into your document, including client, patient, referral source and patient history data. See *Patients* in this user guide for details on the **WP** references available for documents created from a patient record.

To insert a reference from the **WPPalette** in a patient record:

- Click **Show Palette** to open the WP Fields Palette.

- Click where you want to insert the reference.

- From the **WPPalette**, select an option and click **Insert**.

ⓘ Holding down the <Shift> key on your keyboard while inserting an item from the Word Processing Palette will capitalize the text you are inserting.

Inserting Lab Results in a WP Document

To insert lab results in a Patient WP document, select **Insert Lab Entries** from the WP Palette under the **Word Processing** tab of a Patient record.
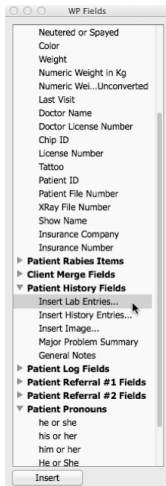
From the **Insert Lab Results** dialog, select **All Lab Results** or specify a date range of lab results for inclusion in the document. Results can be inserted in chronological or reverse chronological order.
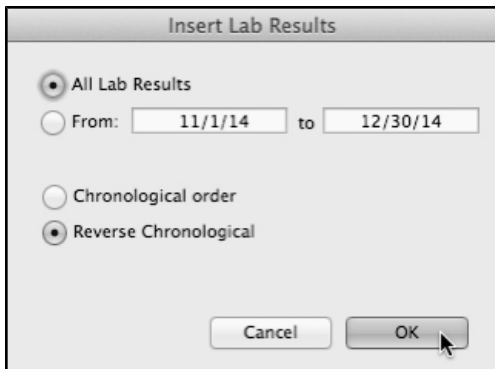

The formatting of the results can be fine-tuned using several advanced settings. Please contact DVMAX Technical Support if you would like assistance in adjusting results display, including column widths and margins.

The WP Menu in a Referral Source

The **WP Palette** in the context of a referral source record lets you insert information from a referral source record into your document. The WP Palette is accessed by clicking **Show Palette** from a Word Processing document. See *Referral Source* in this user guide for details on the **WP** references available for documents created from a referral source record.

To insert a reference from the **WP** menu in a referral source record:

- Click **Show Palette** to open the WP Fields Palette.

- Click where you want to insert the reference.

- From the **WPPalette**, select an option and click **Insert**.
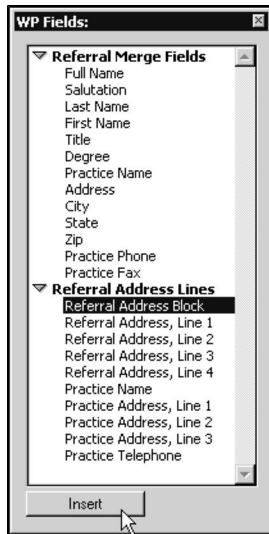
ℹ️ Holding down the <Shift> key on your keyboard while inserting an item from the Word Processing Palette will capitalize the text you are inserting.

Date and Time References in a Word Processing Document

To insert the current date, the current time or both:

- Click where you want to insert the date and time.

- From the Insert menu, select **Date and Time**.
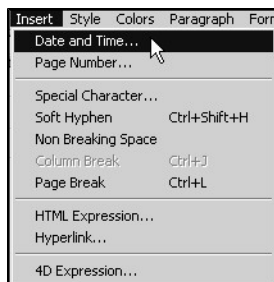
- From the Insert Date window, select the date format from the left list box, or choose **No Date** if you do not want to insert the date. The date will appear in the preview area according to the format you chose.

- Select the time format from the right list area, or choose **No Time** if you do not want to insert the time. The time will appear in the preview area according to the format you chose.

- Select **Automatic Update** to allow the date and time values in the document to be updated to the current date and time whenever the document is opened.   If you do not select **Automatic Update**, the time will be fixed on the date and time the reference was first inserted.
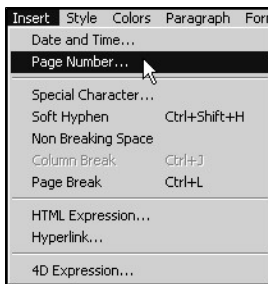
- Click **OK**.
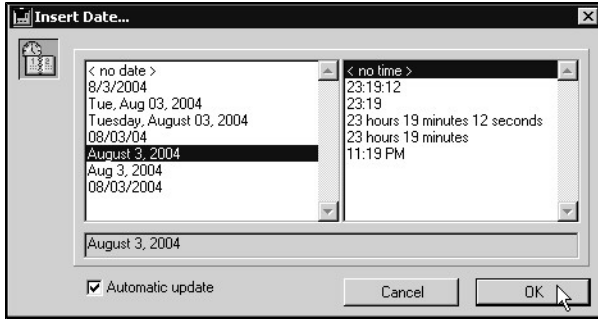
Inserting Page Numbers

You can place references to page numbers in headers, footers or the body of a document. If you insert the page number in the header or footer of a document (you must be working in Page mode), the page number is automatically updated for each page of the document. This allows you to number your pages.

If you insert the page number in the body of the document, it displays the current page number and will be updated if that page is modified, however this will not be repeated for each page. This allows you to reference page numbers of your document.

To insert page numbers in your document:

- Click where you want to insert the page number.
- From the **Insert** drop-down menu, choose **Page Number**.

- From the **Insert Page Number** window, select the pagination style you want to insert.
- Click **OK**.
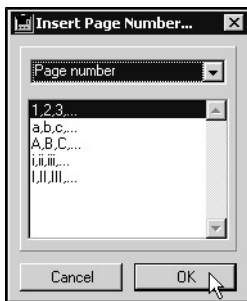
The Tools Menu

The **Tools** menu lets you select utility features such as spellchecking, statistics and document information and the language selection. Using the Tools menu also allows you to display either values or references and to either force an update of the references or to freeze them. You can also activate or deactivate the **Draft** mode.

Freeze a Document

Selecting **Freeze Document** from the **Tools** menu freezes the references to data records in the document so that they are no longer dynamic. In other words, all references are replaced by actual data, such as replacing a [Client Name] field with the actual client name, just as if the information was typed in the document. This action cannot be canceled. You can then save the document.

⚠️ Saving a document as a Case Document will accomplish the same task as Freeze Document. Select **Save As**, then choose **Case Document** from the **Document Class** menu on the Save WP Document window. See *Document Class* for more information.

Table Wizard

The table wizard allows you to define the settings when creating a table. You can:

- Select predefined table templates.
- Define the number of rows and columns.
- Set an automatic text format.
- Set different automatic values and styles for each column.
- Set different automatic values, colors and styles for specific rows.
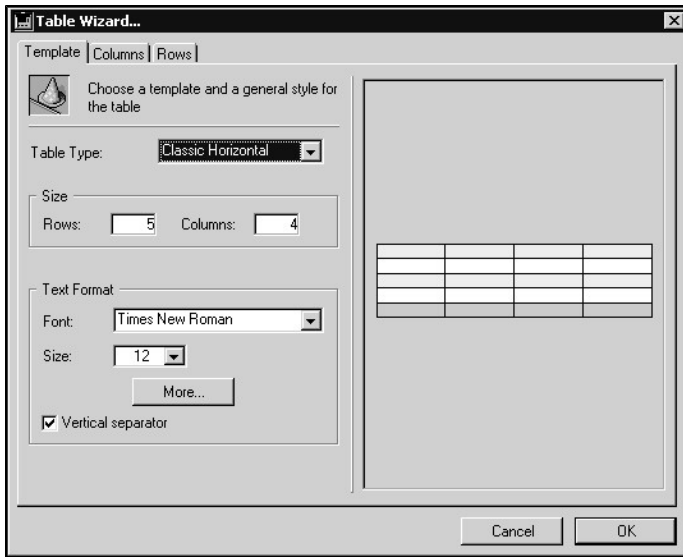
Spell Checking in Word Processing

To check the spelling in your document, select **Spelling** from the **Tools** menu. The checking of the document will begin from the current cursor position. If the spellchecker encounters a mistake, a Spelling dialog box is displayed.
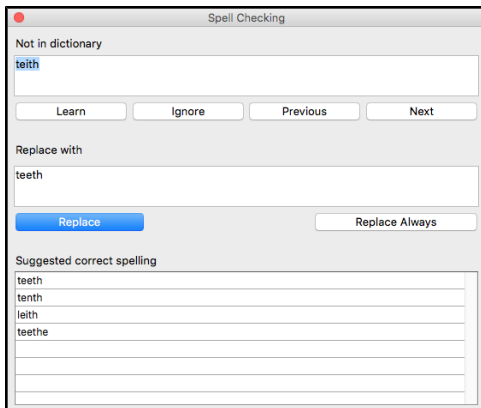
You can also setup the **Shared Dictionary** function from the Spelling window. The Shared Dictionary function allows all workstations to access the same dictionary. See *Shared Dictionary* in this User Guide for details on configuring the Shared Dictionary function.

Language

Choose **Language** from the **Tools** menu to check the current language of the document. This language is used by the spellchecker to determine if the current selected dictionary fits the document. You will not need to use this command, as this is already configured during setup.

Document Information

When you select **Document Information** from the **Tools** menu, a Document Information window opens. You can store useful extra information about the current document, such as title, sub-

ject, author, clinic or practice name and notes or comments. Click **OK** to close the Document Information window and save changes.

Document Statistics

When you select **Document Statistics** from the Tools menu, a Document Statistics window opens. It displays statistics related to the current document, including the total number of lines, pages, characters, words, paragraphs, pictures and references in the current document.

Compute References Now

Selecting **Compute References Now** refreshes the references in the document with the current data from the record in which you are working. In general, this will have no effect on your document and does not ever need to be selected. DVMAX will update the information automatically each time you open the document.

Draft Mode

Draft mode enables an accelerated display of characters in certain cases.

Year-End Procedures and Reports

There are a number of reports and procedures that your practice should run at year-end. These include backing up your DVMAX data, generating miscellaneous financial reports (sale, tax, etc.) and clearing certain time-sensitive client records.

This chapter details what you should do in DVMAX at year-end in your practice. The procedures are divided into those that **must be run at** year-end and those you can run after year-end and.

⚠ Since the time frame for many of these reports is the entire year, some reports will take a while to process and can place an intensive processing load on your server. It is advised that you run these reports at a time that will least impact your business.

Accessing Reports

You can generate any financial report available in DVMAX one of 2 ways:

- Click the *Reports* icon from the *Command Palette*.
- Choose *General Management* from the *Section* menu on the DVMAX main screen, then select the *Reports* tab.

ℹ Reports launched from the *Command Palette* or from the *Reports* tab under *General Management* will appear in the Window List.

Reports That Can Be Generated After Year-End

The following reports can be generated after year-end. We recommend you generate them as early as possible in your new financial year.

Average Invoices Per Doctor Report

The *Average Invoices Per Doctor Report* gives you average billing and payment information for each provider in your practice. For more information on the *Average Invoices per Doctor Report*, see the chapter **Financial Reports**.
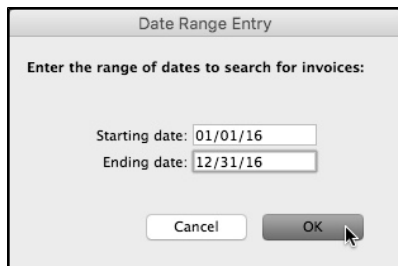
⚠ The *Average Invoices per Doctor Report* bases its results only on an invoice's Primary Provider. It does not take into account other providers specified on an invoice's line items. For more information about Primary Providers and Invoices, refer to the chapter **Invoices**.

⚠ This report can take a long time to complete. It is recommended that you start it at the end of the day and leave it to run unattended while your business is closed.

To generate the *Average Invoices per Doctor Report*:

- Click the *Reports* button on the *Command Palette*.

-OR-

- Choose *General Management* from the *Section* menu on the DVMAX main screen.
- Double click *Average Invoices Per Doctor Report* from the *Reports* list. The *Date Range Entry* dialog displays.
- Type the *Start Date* and *End Date* for the year for which you wish to run the report into the appropriate *Date Range Entry* fields.

- The default format for dates in DVMAX is MM/DD/YYYY.
- Click *OK*.
- From the *Print Setup* window, make any necessary adjustments to the print settings and click *OK*.
- From the *Print* dialog, choose any necessary options and click *OK* to print the report.

Invoice Share by Provider Report

The *Invoice Share by Provider Report* gives you the average revenue per invoice per provider in your practice. Unlike the *Average Invoices per Doctor* report, this report takes into account providers credited on an invoice's individual line items. For more information about Primary Providers and Invoices refer to the **Invoices** chapter in this Guide. For more information on the *Invoice Share by Provider Report*, refer to the **Financial Reports** chapter.

⚠ This report can take a long time to complete. We recommend you start it at the end of the day and leave it to run unattended while your business is closed.

To generate the *Invoice Share by Provider Report*:

- Click the *Reports* button on the *Command Palette*.

-OR-

- Choose *General Management* from the *Section* menu on the DVMAX main screen.
- Double click *Invoice Share by Provider Report* from the list of reports.
- From the Report Options dialog, type the *Start Date* and *End Date* for the year for which you wish to run the report into the appropriate Date Range Entry field.
- The default format for dates in DVMAX is MM/DD/YYYY. So, for example, to generate a report for 2016, type 01/01/2016 into the *Start Date* field and 12/31/2016 into the *End Date* field.
- By default, Show Invoice Details is selected. Deselect the Show Invoice Details checkbox.
- Click OK.
- A Print Setup window opens. Set any necessary print settings and click OK.
- A Print window opens. Set any necessary options and click OK to print the report.

About Generating a List of Top-Spending Clients

Determining which of your clients have spent the most over the course of the year involves performing a search and printing the results of that search.

⚠️ Generate a list of top-spending clients *before updating the Spent YTD Field*. For more information, see the Updating the Spent YTD Field section of this chapter.

Determining a Spending Threshold

You need to decide on a spending threshold before performing a search for your top-spending clients. Simply put, the spending threshold is the minimum dollar amount a client must have spent at your clinic over the past year in order to be included as a top-spending client. For example, if you would like to see all clients who spent more than $1000 at your clinic over the last year, then $1000 is your spending threshold.

Steps for Generating a List of Top-Spending Clients

To generate a list of the year's top-spending clients:

- Choose *Client and Patients* from the *Section* drop-down menu on the DVMAX main screen.

- From the *Find* dialog, select *General* from the *By* drop down menu.
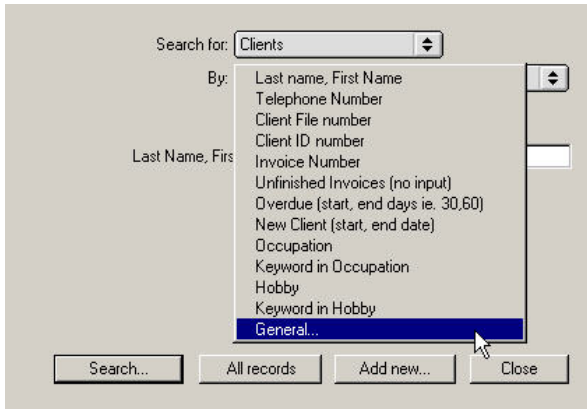
- Click *Search*. The *Query Editor* dialog opens.

- In the *Available Fields* drop-down menu, choose *All Tables*.

- Scroll down the list of fields until you find *Dynamic_Client*.

- Click the plus sign or arrow beside *Dynamic_Client* once. This will expand the list under *Dynamic Client*.

- Locate *Spent YTD* in the list under *Dynamic_Client*. Click *Spent YTD* once.

- In the *Comparisons* list to the right of the screen, click *is greater than or equal to* once.

- Type your dollar threshold in the *Value* box. **Do not type the dollar sign ($).**

- To include only clients who are still active with your practice in the report, click *Add Line* and click on *Inactive* under the available fields table. Then, under the *Comparison's* table choose *is equal to* and in the *Value* field choose *False*.
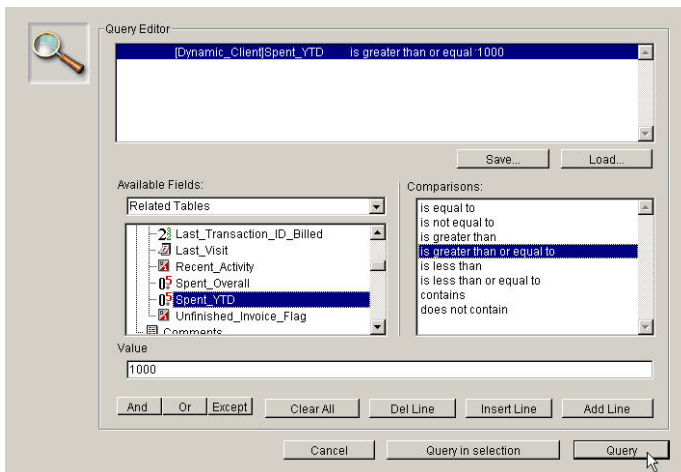
- Click the *Query* button in the lower right hand corner of the *Query Editor* screen.

The time required to perform this search is dependent on the speed of your computer and the number of clients and invoices in DVMAX.

Printing the List of Top-Spending Clients

To print your list of top clients:

- While viewing the client list, chose *Select All* from the *Edit* drop-down menu at the top of the screen. This will highlight the entire list.

- Choose *Print* from the *File* menu on the DVMAX main screen. The *Printing Clients* window opens.
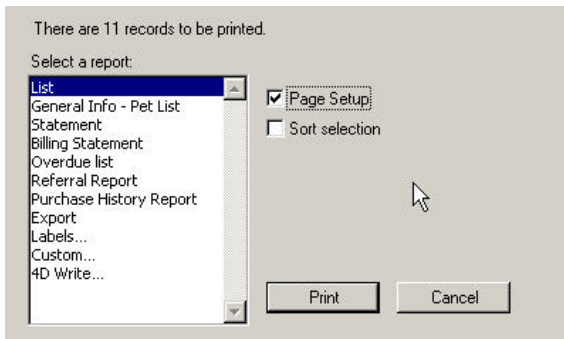
- Choose *Custom* from the Report List and click *Print*. The *Quick Report* window opens.

- In the *Quick Report* window, make sure *Related Tables* is selected from the drop-down list under *Report Parameters*, then double click on *Full Name*.

- Now select *All Tables* from the drop-down list under *Report Parameters* and click the arrow beside *Dynamic Client* to expand that listing.

- Drag *[Dynamic_Client]Spent_YTD* over into the *Sort Order* box

- Click the 'up arrow' once, which makes it look like a 'down arrow'. This will sort the list by Descending (biggest spender first.)

- Go to the *File* menu and choose *Generate*

- This will print the list of clients who have spent more than the amount specified in your previous search, and will be sorted by the greatest to least.

Year-End Income Summary

A *Year-End Income Summary* allows you to see which categories account for what percentage of your practice's revenue over the last year. You generate a *Year-End Income Summary* by

running a *Detailed Sales Report* broken down by Category. For more information on *Detailed Sales Reports*, see **Reports** elsewhere in this manual.
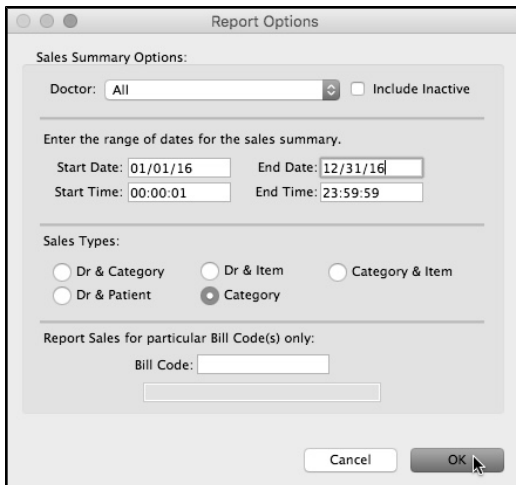
⚠ This report can take a long time to complete. We recommend you start it at the end of the day and leave it to run unattended while your business is closed.

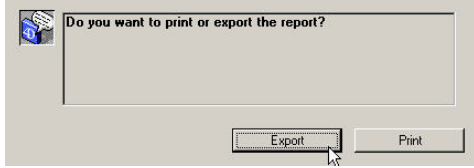To generate a *Year-End Income Summary*:

- Click the *Reports* button on the *Command Palette*.

-OR-

- Choose *General Management* from the *Section* menu on the DVMAX main screen.

- Double click *Detailed Sales Report* from the reports list. The *Report Options* screen opens.

- Type the *Start Date* and *End Date* for the year for which you wish to run the report into the appropriate *Date Range Entry* field.

- The default format for dates in DVMAX is MM/DD/YYYY. So, for example, to generate a report for 2016, type 01/01/2016 into the *Starting Date* field and 12/31/2016 into the *Ending Date* field.

- Click the *Category* radio button. This tells DVMAX to generate a Category Sales Report. For more information on this and other reports, refer to the **Financial Reports** chapter.

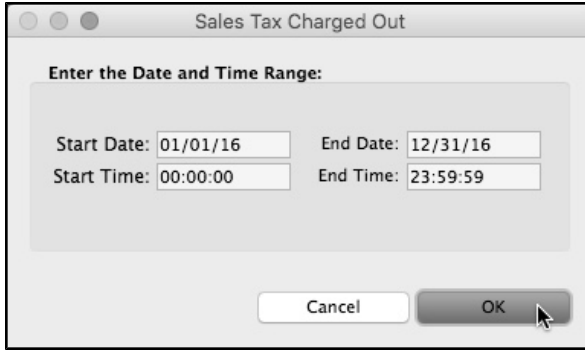- Click *OK* to generate the report. DVMAX will ask you if you want to print or export the report.

- Click *Export* to export the report to an Excel-compatible file on your computer

-OR-

- Click *Print* to print the report.

Sales Tax Report

A year-end *Sales Tax Charged Out Report* allows you to see a detailed listing of sales tax col-lected over the course of the year. A year-end total is also provided. For more information on Sales Tax Reports, see the **Financial Reports** chapter.

⚠ This report can take a long time to complete. We recommend you start it at the end of the day and leave it to run unattended while your business is closed.

To generate a sales tax report:

- Click the *Reports* button on the *Command Palette*.

-OR-

- Choose *General Management* from the *Section* menu on the DVMAX main screen.

- Double click *Sales Tax Charged Out Report*. The *Date Range Entry* dialog opens.

- Type the *Start Date* and *End Date* for the year for which you wish to run the report into the appropriate *Date Range Entry* field.

- The default format for dates in DVMAX is MM/DD/YYYY. So, for example, to generate a report for 2016, type 01/01/2016 into the *Start Date* field and 12/31/2016 into the *End Date* field.

- Click *OK* to generate the report. DVMAX will ask you if you want to print or export the report.
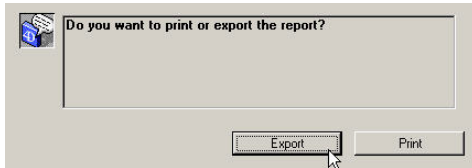
- Click *Export* to export the report to an Excel-compatible file on your computer.

-OR-

- Click *Print* to print the report.

For more information on exporting reports, see **Financial Reports**.

Reports That Must Be Generated At Year-End

The following reports **must be run at year-end**; they either cannot or should not be run in a new financial year.

Receivables Report

The *Receivables Report* gives you a list of all outstanding receivables. For more information, see the **Financial Reports** chapter.

 It may take some time to generate the Receivables Report depending on the number of invoices in your system and the speed of your computer.

To generate a year-end *ReceivablesReport*:

- Click the *Reports* button on the *Command Palette*.

-OR-

- Choose *General Management* from the *Section* menu on the DVMAX main screen.
- From the list of Reports, double click *Receivables Report*.
- From the *Receivables Report Options* dialog, select *Totals Only*.

- Click *OK* to generate the report. DVMAX will ask you if you want to print or export the report.
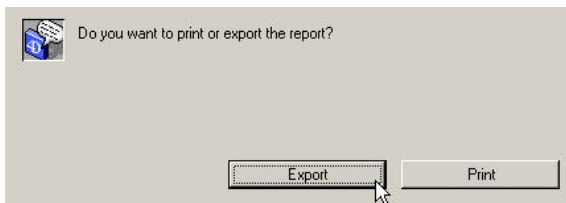
- Click *Export* to export the report to an Excel-compatible file on your computer.

-OR-

- Click *Print* to print the report.

For more information on exporting reports, see **Financial Reports** in this manual.

ℹ If you pay your providers based on production, repeat the steps above and click *Provider Breakdown* instead of *Totals Only* to generate a Receivables Report broken down by provider.

Inventory Value Report

The year-end *Inventory Value Report* provides you with the net value of the inventory you have on hand in your clinic.

⚠ You only need to print this report if your practice makes use of DVMAX's Inventory features. For more information, see the chapter on **Inventory**.

ℹ It may take some time to generate the Inventory Value Report, depending on the number of invoices in your system, and the speed of your computer.

To print the year-end *Inventory Value Report*:

- Select *Inventory Management* from the *Section* drop-down menu of the DVMAX main screen.
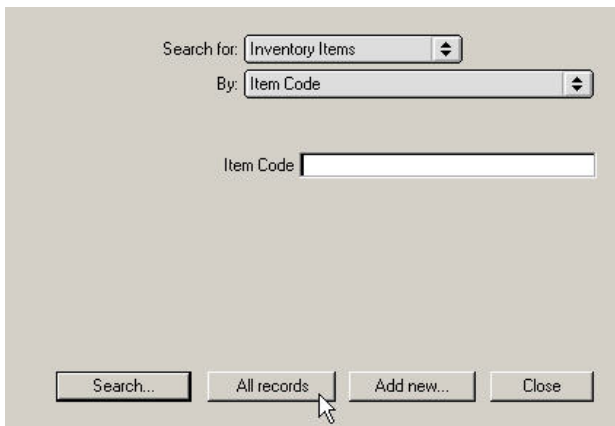
- From the *Find* dialog, click *All Records*. This will display a list of all inventory items.
- While viewing the list of inventory items, choose *Select All* from the *Edit* drop-down menu to highlight all of the items.
- From the *File* drop-down menu, choose *Print*. The Printing Options dialog opens.
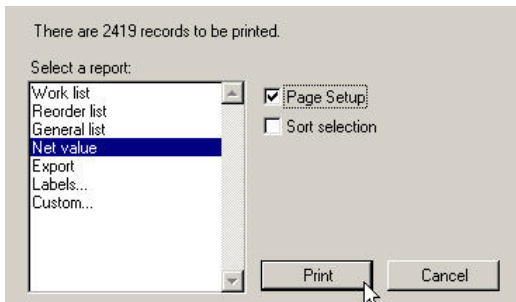
- Click to highlight *Net Value* in the list of reports in the *Printing Options* dialog.
- Click *Print*.
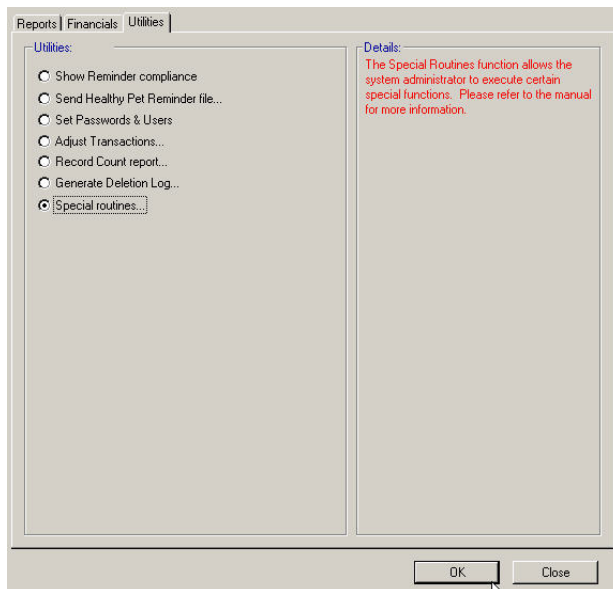
Updating the Spent YTD Field

DVMAX keeps a running total of how much each client has spent per year at your practice. Updating the *Spent YTD (Spent Year-To-Date)* tells DVMAX to zero all spending totals for all clients in preparation for a new financial year. If you do not update the Spent YTD field early in the new financial year, DVMAX will include the previous year's spending with the current year's, presenting confusing totals on some reports.

⚠️You should run this procedure only *after you have run all other procedures* in this chapter. In particular, *do not* run this procedure before generating a list of top-spending clients.

⚠️ You should only update the Spent YTD field *once per financial year, at the beginning of your financial year*. If you are unsure about performing this procedure, please contact DVMAX Technical Support.
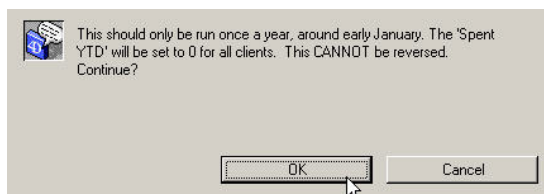
To update the Spent YTD field:

- Select *General Management* from the *Section* menu of the DVMAX main screen. The *Management Functions* dialog opens.
- Select the *Utilities* tab on the *Management Functions* dialog.

- From Utilities, select *Special Routines*.
- Click *OK*.
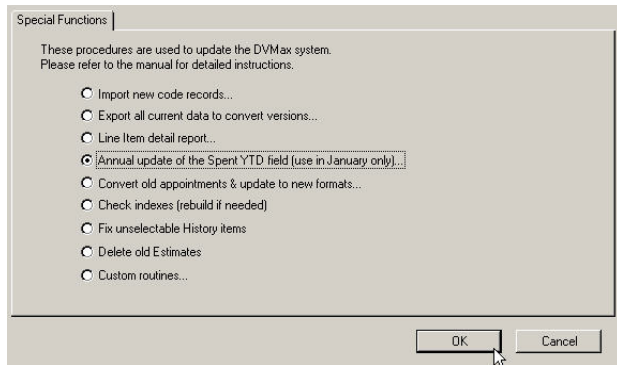
- From the *Special Functions* dialog, select *Annual Update of the Spent YTD field (use in January only)*.

- DVMAX will ask you to confirm that you want to update the Spent YTD field. It is possible you will be asked to confirm more than once. To proceed, click *OK* each time you are asked.

- DVMAX will display a message when the Spent YTD field has been updated. Click *OK* to dismiss the message and continue working with DVMAX.

Year-End Backup

An end-of-year backup does not differ significantly from your regular backup procedures. For more information on backing up your DVMAX data, see the appropriate section of this manual.

General Backup Guidelines

Your DVMAX data is the single most important asset of your practice; you can protect your investment by following the guidelines below.

- Backups should be performed daily. Each business day should be backed up to a separate data storage device or cloud service.

- Only staff properly trained in backup procedures should perform backups. Incorrectly performed backups can cause unexpected data loss. If you need help performing backups, please contact DVMAX Technical Support.

- Keep at least one copy of your backup in a location other than your clinic or office. This will protect you against theft or fire.

Year-End Backup

We recommend you make a year-end backup on a separate data storage device. Follow these steps to make an annual archive of your DVMAX data:

- Obtain an additional data storage device.

- Make a backup of your DVMAX data as you would normally.

- Label your backup appropriately and store it in a safe place, preferably off-site in a fireproof container.

Mirroring

You can set up a 'mirror' server with DVMAX to assist with Disaster Recovery Plans. This valuable feature allows an identical 'read only' server to exist idly, with up-to-minute information of the primary system. In an event that the primary server goes down, the mirror server can immediately be accessed until a new primary server can be introduced.

To setup Mirroring and review full documentation, contact DVMAX Technical Support.