The VET•System

Windows Version 3.0

User Manual (Supplement)

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http://thevetsystem.com
Revision 1.1

Revision History

Rev. Number	Revision Date	Summary of Changes	Author
1.0	09/21/2016	Initial Documentation Started	DWG
1.1	10/02/2016	Additional Changes Noted (Lock Screen, Doc Notice, Backups)	DWG

Contents

1 INTRODUCTION....5

1.1 PURPOSE....5
1.2 SUPPLIES NEEDED FOR UPDATING TO V. 3.0....6
1.3 FILES NEEDED FOR DATABASE CONFIGURATION....6

2 THE VET SYSTEM CLIENT/PATIENT/CHECKOUT SCREEN....6

2.1 TOP CLIENT/PATIENT/CHECKOUT MENU AND TOOL BAR....7
2.2 MENU BAR COMPONENTS....7
2.3 STORAGE CELLAR AND REPORTS SECURE ACCESS....8
2.4 BUTTON BAR MENU....9
2.5 CLIENT INFORMATION AREA....9
2.6 CLIENT ADD / EDIT....10
2.7 BOTTOM OF CLIENT / PATIENT / CHECKOUT SCREEN....11
2.8 PATIENT INFORMATION TABS....11
2.9 VACCINE INVENTORY MACRO REQUIREMENT....13

3 DOCUMENT ATTACHMENTS....14

3.1 IMPORT....14
3.2 DETAILS (AKA VIEW)....15
3.3 REMOVING / PURGING ATTACHMENTS....16
3.4 MISC CLIENT PATIENT SCREEN OPTIONS....16

4 RABIES....17

4.1 RABIES CERTIFICATE....18
4.2 RABIES INPUT / EDIT INFORMATION FORM....19
4.3 RABIES PRINTING....20
4.4 RABIES DEFAULT INFORMATION SETTINGS....21
4.5 RABIES CERTIFICATE RE-PRINTS....22
4.6 RABIES CERTIFICATE CORRECTION....23

5 SEND REMINDERS FORM....23

6 SOAPS....24

6.1 MAIN SOAP VIEW....24
6.2 TOPICS (SUBJECTIVE, OBJECTIVE, ASSESSMENT, PLAN, COMMENTS)....25
6.3 SOAP SPELL CHECK....26

7 MACRO CHECK....27

8 STANDARD MENU OPTIONS AND MISC....28

8.1 NEXT OR PREVIOUS CLIENT....28
8.2 RIGHT MOUSE CLICK OPTIONS....28

9 HOSPITAL HEADER EDIT SYSTEM UTILITIES....29

9.1 OPTIONAL INVOICE GRAPHICS....29
9.2 MENU OPTION....29

10 EXIT OPTIONS....30

11 BACKUP....31

11.1 NORMAL 31
11.2 OPTIONAL BACKUP 32

1 Introduction

1.1 Purpose

This document contains information about changes, updates, and features that are NOT covered in The VET System Windows user manual. The program functions much as version 2.0 has, yet numerous additions have been made that required the production of this material. Changes were made to these following areas.

1. Client / Patient / Checkout screen is now the 'Main' access to All other areas of the Program
2. Added Menu Bar and Graphic Button Bar to Client / Patient / Checkout screen
3. Added Recent Client List to select Clients for the day's activities
4. Added Co-Owner Information to each Client's data stores
5. Added Tabbed information access for, History, Reminders, Vaccines, Estimates, & SOAPS
6. Added Import and Attach Documents to Patient, or Client records
7. Added Old Invoices to Always be in view and selectable
8. Added Patient History to always display initially for Currently selected Patient
9. Eliminated the NEXT and PREVIOUS Client buttons and Functions
10. Retain Rabies Vaccine Information for future reference and/or Re-Printing
11. Redesigned Send Reminders Form to be all inclusive
12. Added additional customization to Company Logo image on Invoice
13. Added Support for Legacy Menu Option if desired
14. Added Administrative Backup for USB, External, and / or Network Drive

1.2 Supplies needed for Updating to v. 3.0

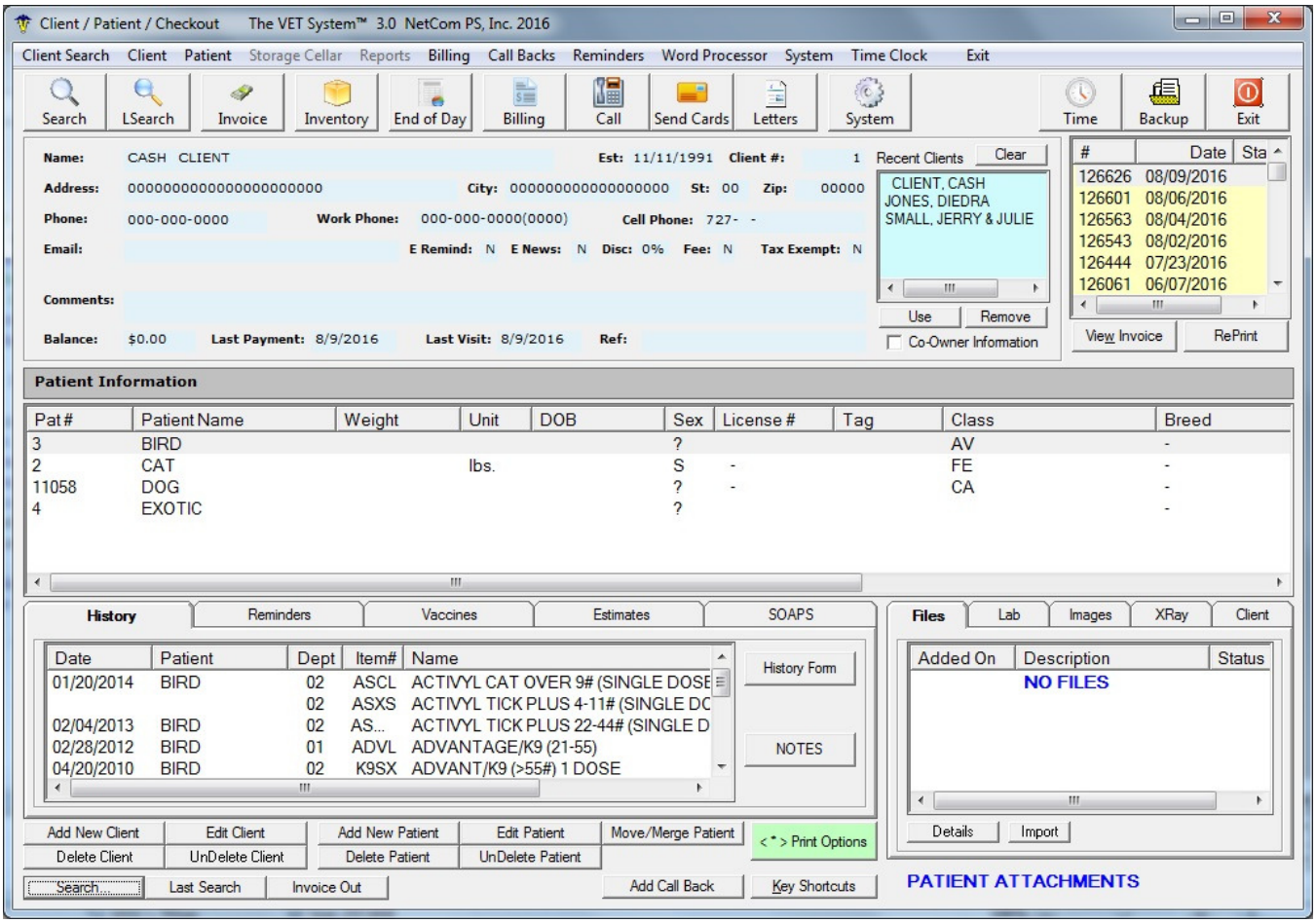
ME (Unless you're really, Really, REALLY Good) :)

1.3 Files needed for Database Configuration

The following files are needed to configure systems for v. 3.0:

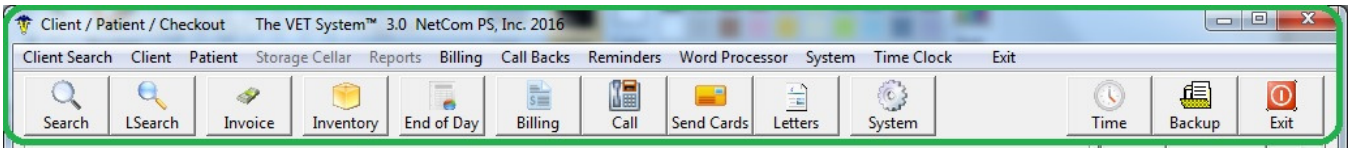
- Current Installed Version Must be Minimum of 2.0 prior to updating
- VetInst.exe Version 3.0 from NetCom-PS, Inc.
- Vet Utilities v. 3.0 for checking current database status and conversion
- Backup tool to preserve existing data prior to conversion

2 The VET System Client/Patient/Checkout Screen



Overview
The Client/Patient/Checkout screen is the DEFAULT screen with the release of v. 3.0. PCs can be configured to use the original styled "Menu" interface to navigate through the various components of The VET System. However, the redesigned look of the Client/Patient/Checkout screen has incorporated access to all tasks from this screen.

2.1 Top Client/Patient/Checkout Menu and Tool Bar



- Tool and Menu Bars have been added to this screen to navigate to all parts of the program. This is now the gateway. (If you find that the original Menu driven application works best for you, fear not, there is an option to enable the original Menus from within System Utilities. More on that here: Hospital Header Edit 8.2)
- At the Top of the Client/Patient/Checkout Screen, is the "Title Bar", which indicates the current version of the software that is being used.
- Directly under the title bar is the "Main Menu" bar.

2.2 Menu Bar Components

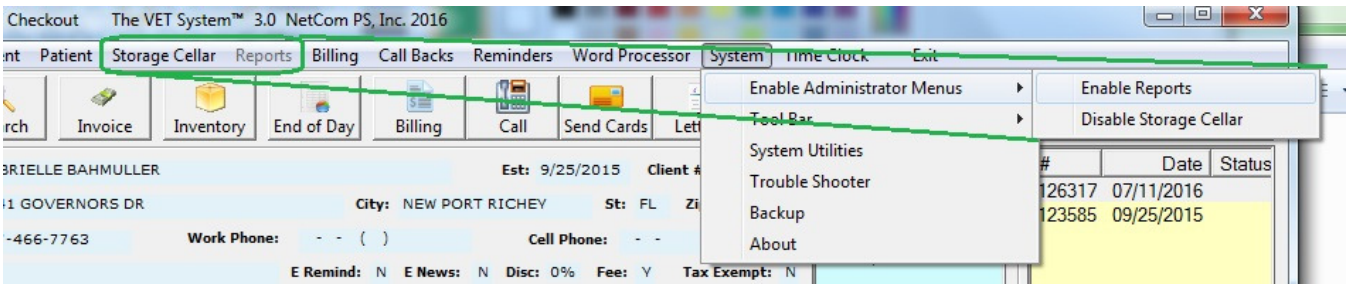
Here are some of contents found on the Menu bar:

- Client Search
  - Search (by Client, Patient features, or Invoice number)
  - Last Search (simply reinitiates the previously used search criteria
- Client
  - Add, Edit, Delete, Undelete Client
  - You may also access Client Reminders from this menu
- Patient
  - Add, Edit, Delete, Undelete, Move/Merge
- Storage Cellar (Optional Password ability)
  - Inventory
  - Departing Instructions / Reminders
  - Breeds
  - Departments
  - Vendors
  - Orders
- Reports
  - All Reports are accessible from this menu.

  (Optional Password ability)

- Billing
  - Accesses Billing Menus (Optional Password ability)
- Call Backs
- Reminders
  - Current Client Reminders on File / Edit / Add / Delete
  - Send Reminders Access (Optional Password ability)
- Word Processor
- System
  - Enable / Disable Storage Cellar and Reports Menu (if Protected)
  - Show / Hide Tool Bar
  - System Utilities
  - Trouble Shooter
  - Backup Alternative
  - About
- Time Clock and Employee Information Access
- Exit

2.3 Storage Cellar and Reports Secure Access



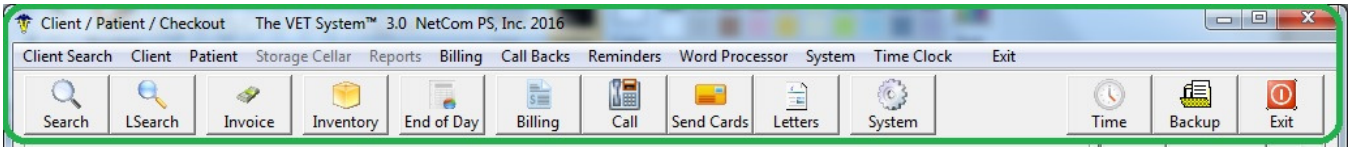
Enabling the Storage Cellar and/or Reports Menu access will be necessary IF these areas are Password Protected within System Utilities.

To Enable a Menu that has Password Protection:

- Select the 'System Menu'
- Select 'Enable Administrator Menus'
- Select the 'Enable' menu to allow access.
- Upon entering the correct Password, the Menu will be enabled for use

When finished, it is advisable to revisit the System Menu and once again secure access to this area by selecting 'Disable…' the appropriate Menu.

2.4 Button Bar Menu



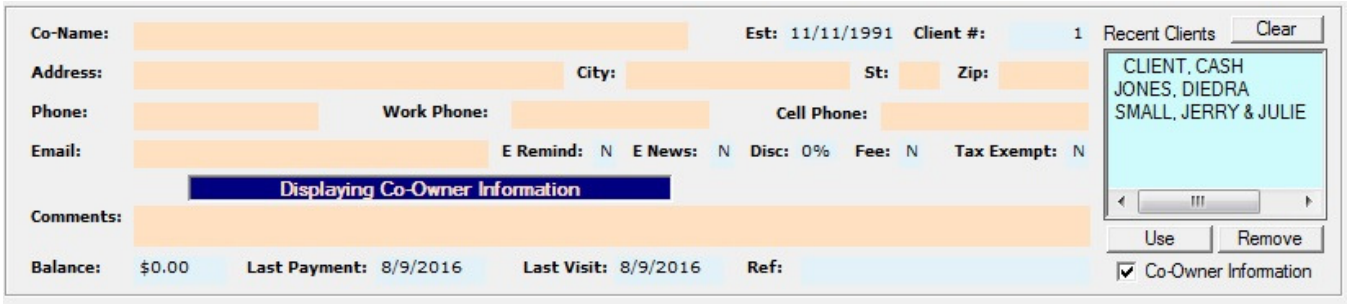
- The Button Tool bar is directly below the Main Menu bar. It includes often accessed Items for use by the user.

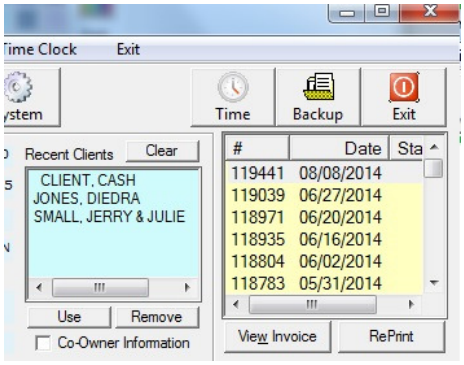
• Client Search • Last Search • Invoice • Inventory • End of Day • Billing • Call Backs	• Send Reminders • Letters • System Utilities • Time Clock / Employee • Backup (Opt on Server ONLY) • Exit

To remove the Button bar, right click the Button bar and un-check the appropriate listing.

2.5 Client Information Area

The Client information now allows for the addition of a Co-Owner or other person's information to be co located with the Client. Check the "Co-Owner" box, as seen in this illustration in the lower right corner of the image. To return to the Main Client's information, simply un-check the check box. (Text color of Co-Owner checkbox will be **Orange** if data exists.)



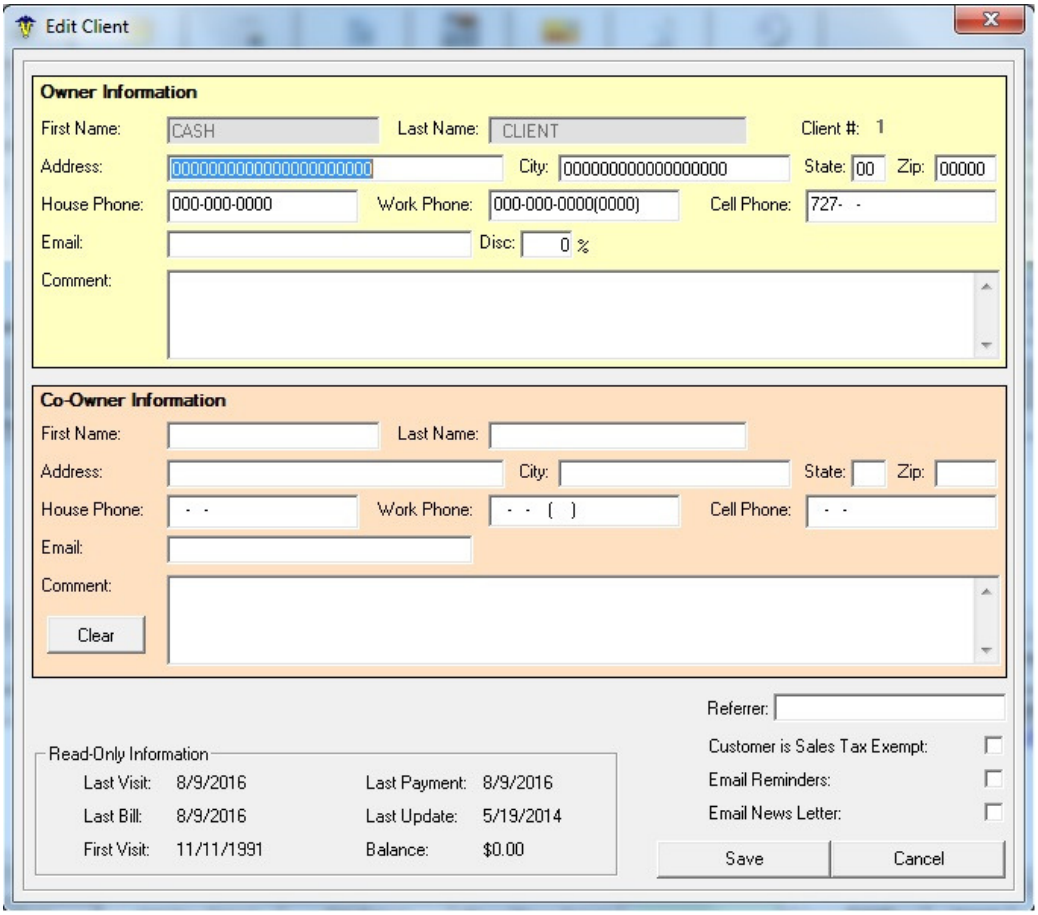


You will also notice a NEW "Recent Clients" list displayed on the right of the Client Information area. Any time a Client is SEARCHED and Selected, the Selected Client name will be placed on this list. This facilitates getting to a current client must faster. Like many other areas within the program, you can use the Right Mouse CLICK to access common tasks.

Old Invoices are ALWAYS displayed for easy reference.

2.6 Client Add / Edit

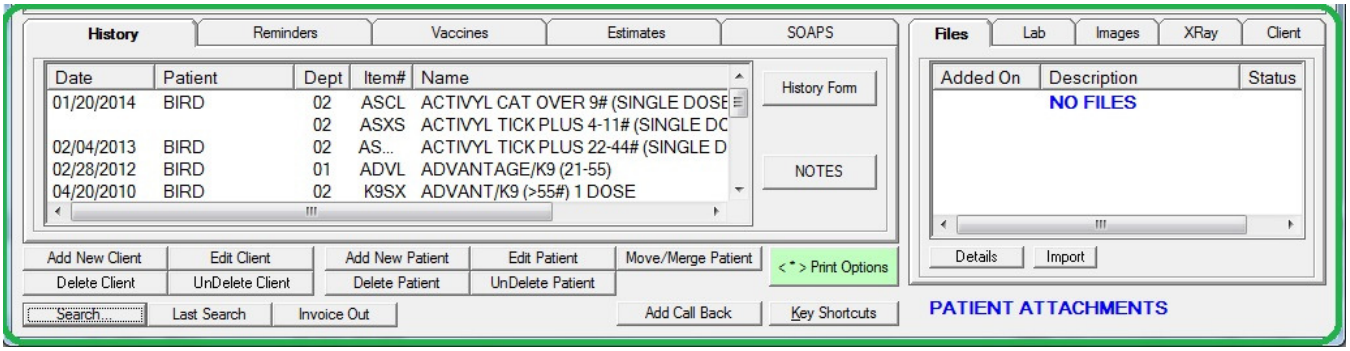
The Client Add / Edit form has been updated to include the information required by the new Co-Owner feature. NONE of the information is required to be entered for the Co-Owner, but rather available if desired.



- Searching Client Information, now includes Co-Owner Fields in the Search. IE:
    - Last Name search, Searches Client & Co-Owner, last name fields.
    - Phone Search, Searches Client & Co-Owner phone numbers, if found will be listed in results.
- The Search Results List of columns may be rearranged in a desired order of appearance by right clicking the list, and setting the Columns in order. You may also drag the size of the columns to fit the fields as you wish.

2.7 Bottom of Client / Patient / Checkout Screen

The lower area of the Client / Patient / Checkout screen has been overhauled and includes many new features. There are now Information Tabs on the lower Left portion of the screen to provide easy access to relevant information. Additionally, on the Right portion, the ability to "Import" data files to Patient records has been created. Of course, to save such files they do need to be digital.

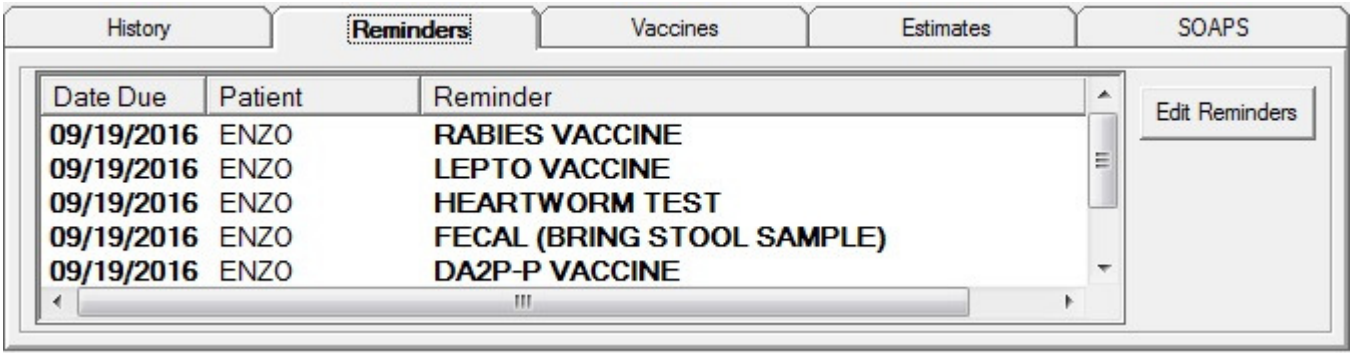


The left Patient Tabs are: History, Reminders, Vaccines, Estimates, and SOAPS.
The right Document Tabs are: Files, Lab, Images, Xray, and Client

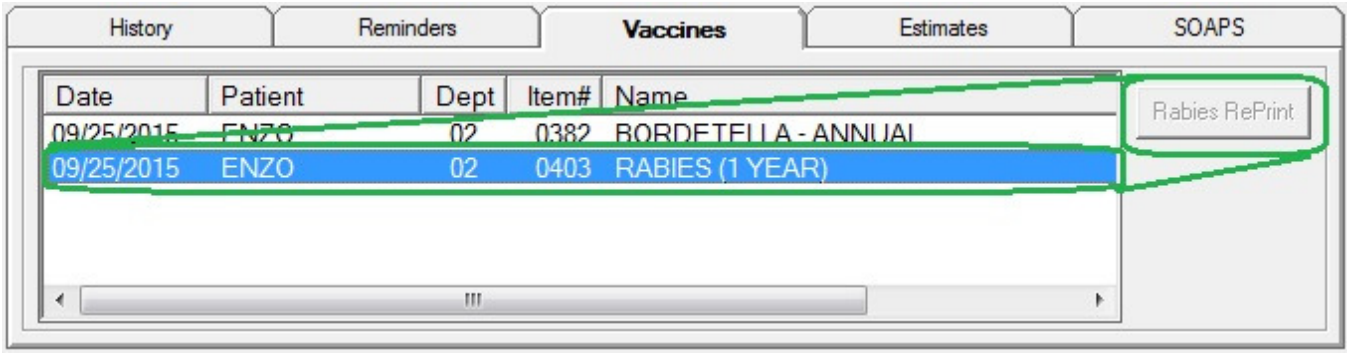
2.8 Patient Information Tabs

- Patient History Tab is immediately available for viewing when selecting a particular Patient
  - Search for a particular History item by selecting the History Button on the Tab
  - Likewise access to Patient Notes is accommodated by selecting the NOTES button.

- Reminders Tab will show current reminders on file for the Patient selected
  - Clicking on the Reminders Button allows for Editing, Adding, or Deleting Reminders for not only the Patient selected, but for any of the other Client's Patients also.

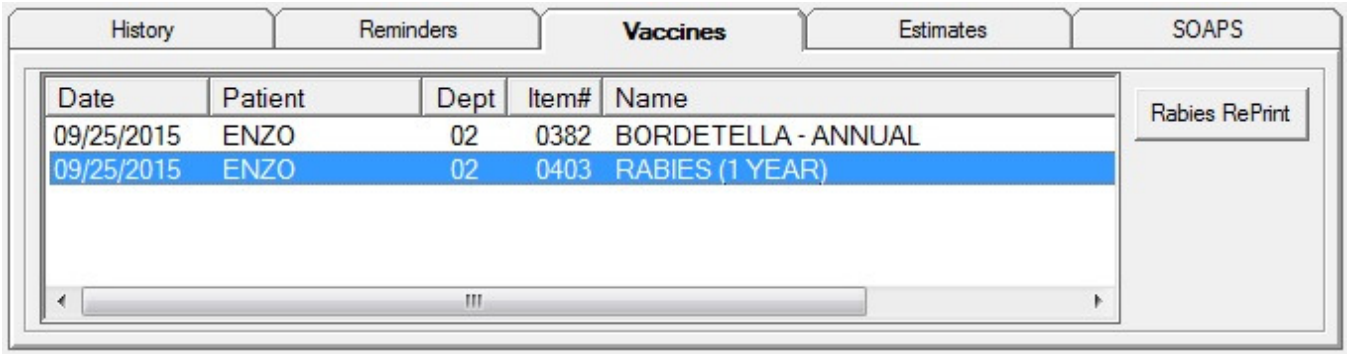


- Vaccines will display Patient History of Vaccines the Patient has received
  - This tab has a "Rabies" button that normally will be disabled, UNLESS the item selected has a saved RABIES RECORD for this Patient for that item. More on this under 4 RABIES.



Rabies RePrint Disabled

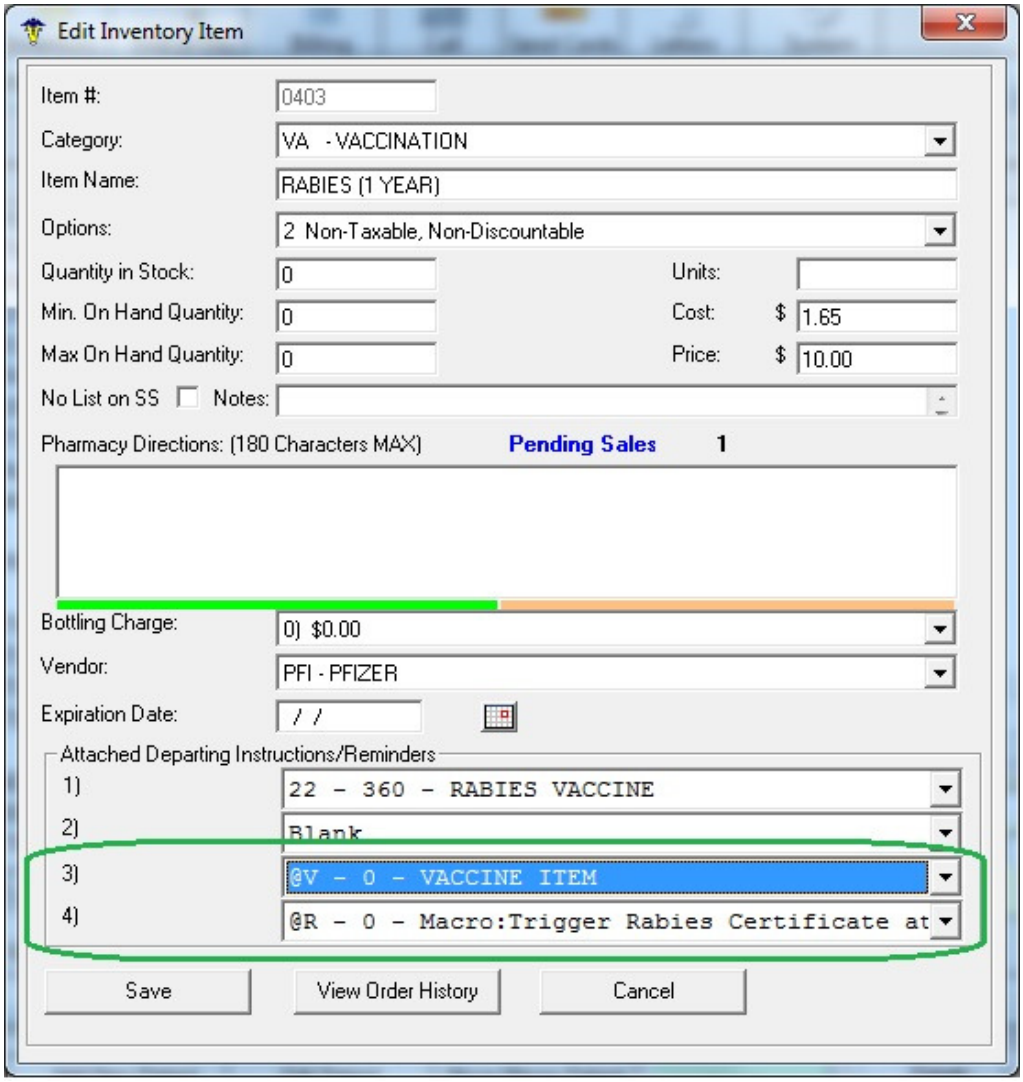
(Note: That while both items illustrated here are the same, a Rabies Record has been created that now enables the "Rabies RePrint" button on the illustration below.)



Rabies RePrint Enabled

- Estimates displays the list of any Estimates on file for the Patient selected
- SOAPS like estimates, will display the list of documents on file for the selected Patient

2.9 Vaccine Inventory Macro Requirement



For the Vaccines to appear in the list properly, Inventory Items that are VACCINES, MUST have the @V Reminder Macro assigned to the Inventory Item.

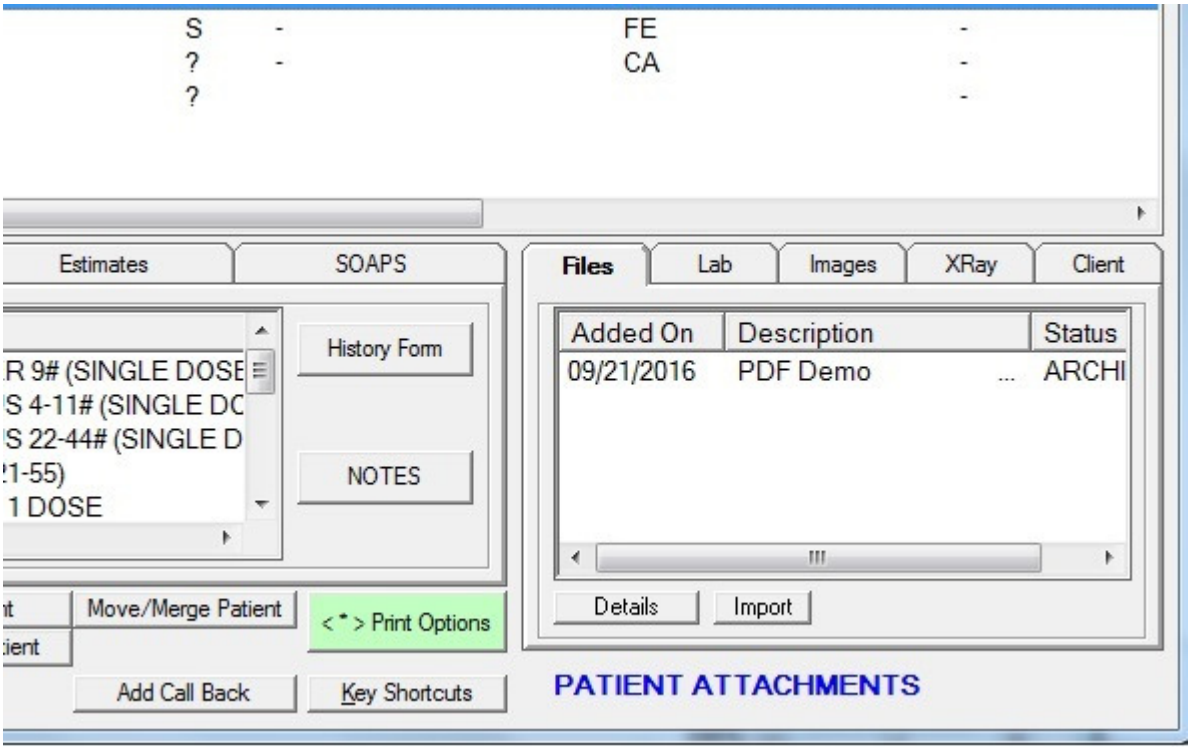
3 Document Attachments

Documents can be imported and attached to Patients and / or a specific Client. The records may be DOC, PDF, JPG, BMP, GIF currently. It is recommended that PDF files be used when at all possible, as these files are less vulnerable to tampering and modifications. With that said, it does not limit the use of these other file formats.

3.1 Import

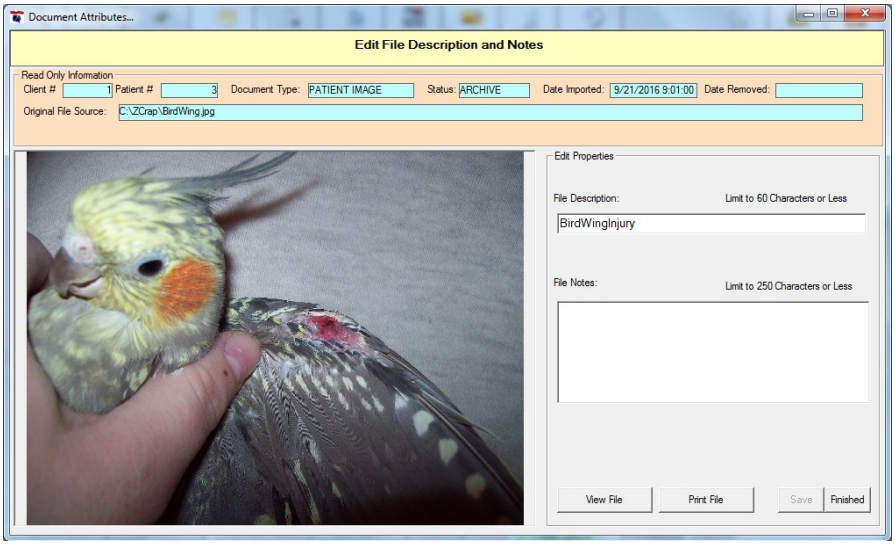
When the file is imported, The VET System copies the file to a specific folder and gives the new copy a unique name. The original file is left unchanged and in its original location. The VET System database records the information and updates the Patients records accordingly.

Select Import, browse and select the file. Enter a Brief Description of the Item being imported. Click Okay. The File entry now appears in the list where imported.



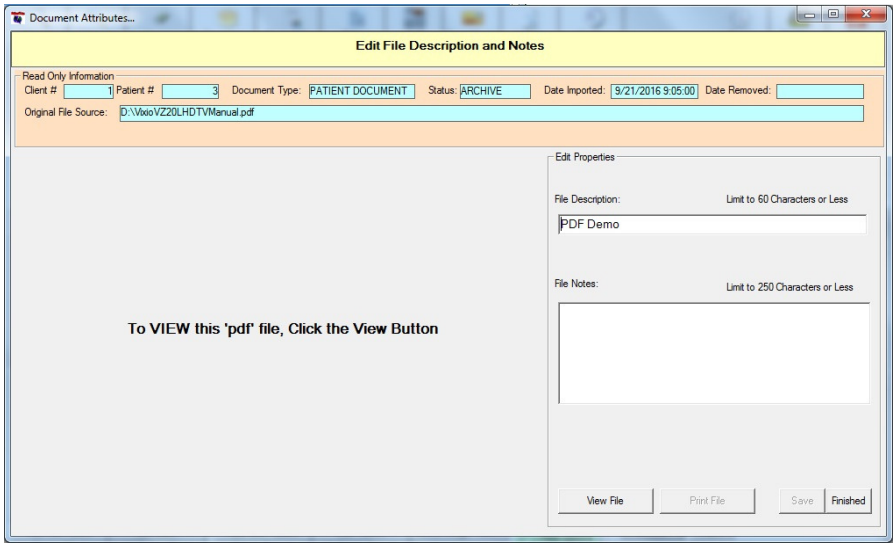
3.2 Details (aka View)

The Details Button is used to view the item selected within the list provided. It is also possible to Right Click an Item and choose the Details selection there. Or, double click an Item will open the Details Window.



Here you can view the Details about the Document. Client, Patient, Document Type, Status, Date Imported, Original Location and file name are all available here. If desired, it is also possible to change the Description of the item and provide additional notes related to this item here.

- To view an even larger version of this file, click the View File button.
- To Print the File, select the 'Print File' button.
- Click 'Finished' when done.



If the attached file is a PDF or DOC format, the Details Window displays the file time and information just as it does with the image files.

Click the 'View File' button and the file will be opened by the default application associated with its file type.

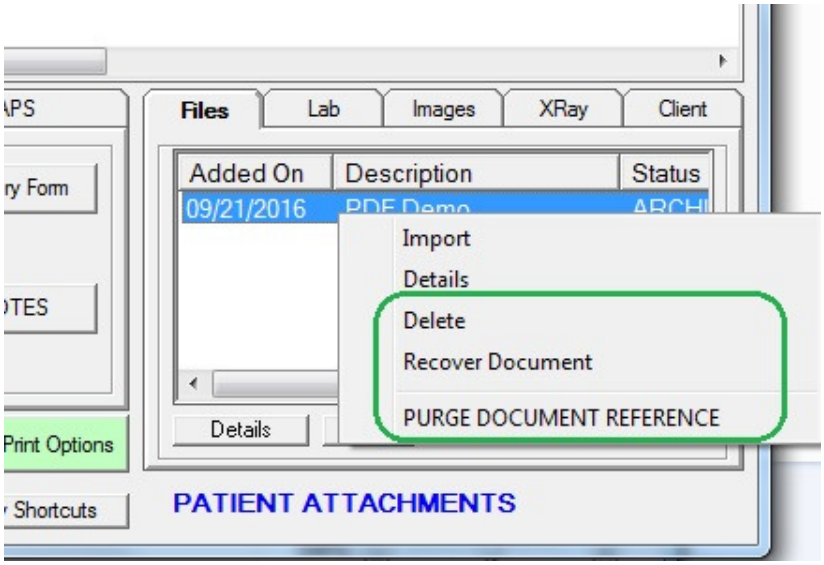
3.3 Removing / Purging Attachments

At times, removing attachments or purging them might be necessary.

Removing an Item
Removing an Item, does not "Delete or Erase" the item. It simply MARKS the file as 'Removed' indicating it is no longer valid for this Patient / Client.

Purging an Item
Purging an Item, does not "Delete or Erase" the item. It simply Removes item from the Patient / Client attachment list.

Because these operations are considered sensitive, Items be ONLY be Removed / Purged, by using the Right Click operation over the selected item.



Recovering an Item
Recovering an Item can ONLY be accomplished on items Marked as REMOVED.

3.4 Misc Client Patient Screen Options

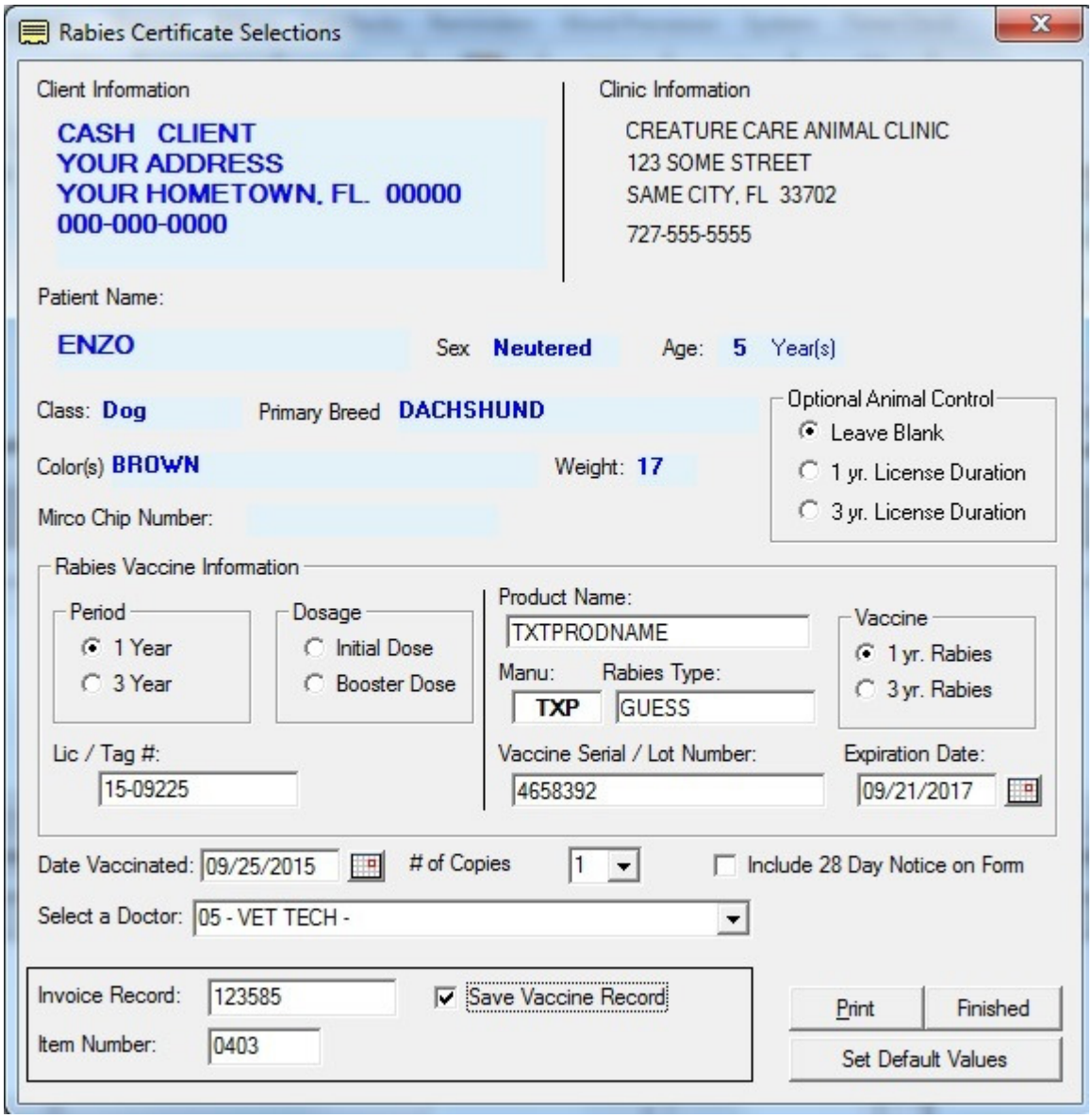
- Added "F2" function key launch the Screen Saver to block the view of the Client / Patient screen while the computer is unattended. Pressing the ESC key returns the Client / Patient view. (Only Client / Patient screen.)
- Client / Patient screen will auto launch Screen Saver after 60 seconds to obstruct the view.

Note: Further security may be implemented by setting a USER account password within the Windows Operating System, and using the Windows Key + 'L' key to lock the computer while away. This will prevent wondering eyes from seeing things they shouldn't have access to.

4 Rabies

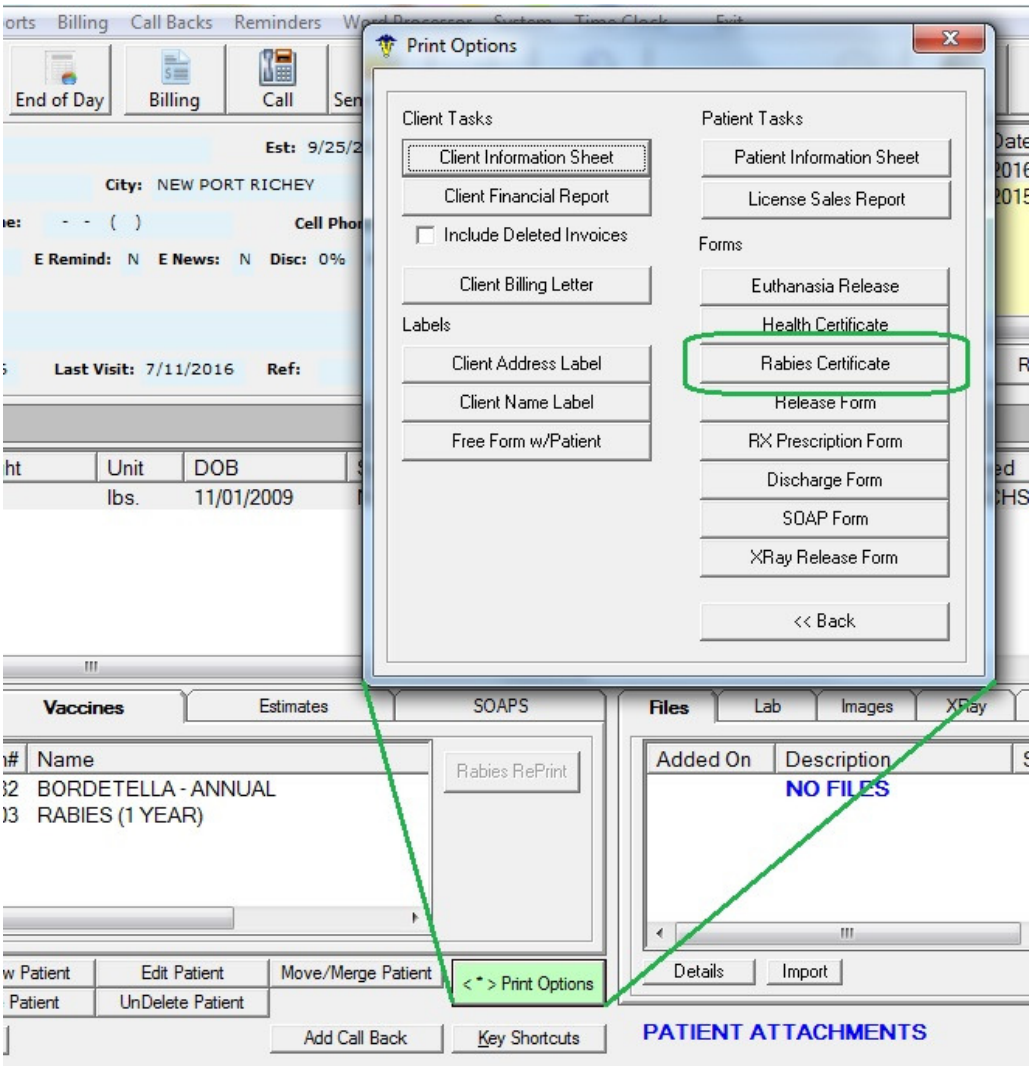
Rabies Certificates along with the individual records can not be saved when generated, UNLESS, certain things are in place before the record is created.

1 Rabies Item(s) in Inventory must have a @R or optional @V code attached to it.
2 Other VACCINES that are NOT Rabies, should have the @V code attached to them.
3 Rabies Vaccine, and License Number Issued or entered on the Rabies Form, Can be saved to the Patient's data, but will NOT be saved to a Rabies Record unless the following is met.
4 The Invoice MUST have THIS Patient, THIS Item for THIS Patient on THIS Invoice!!
It is NOT possible to Save a Rabies Record to a Patient's information without an INVOICE #



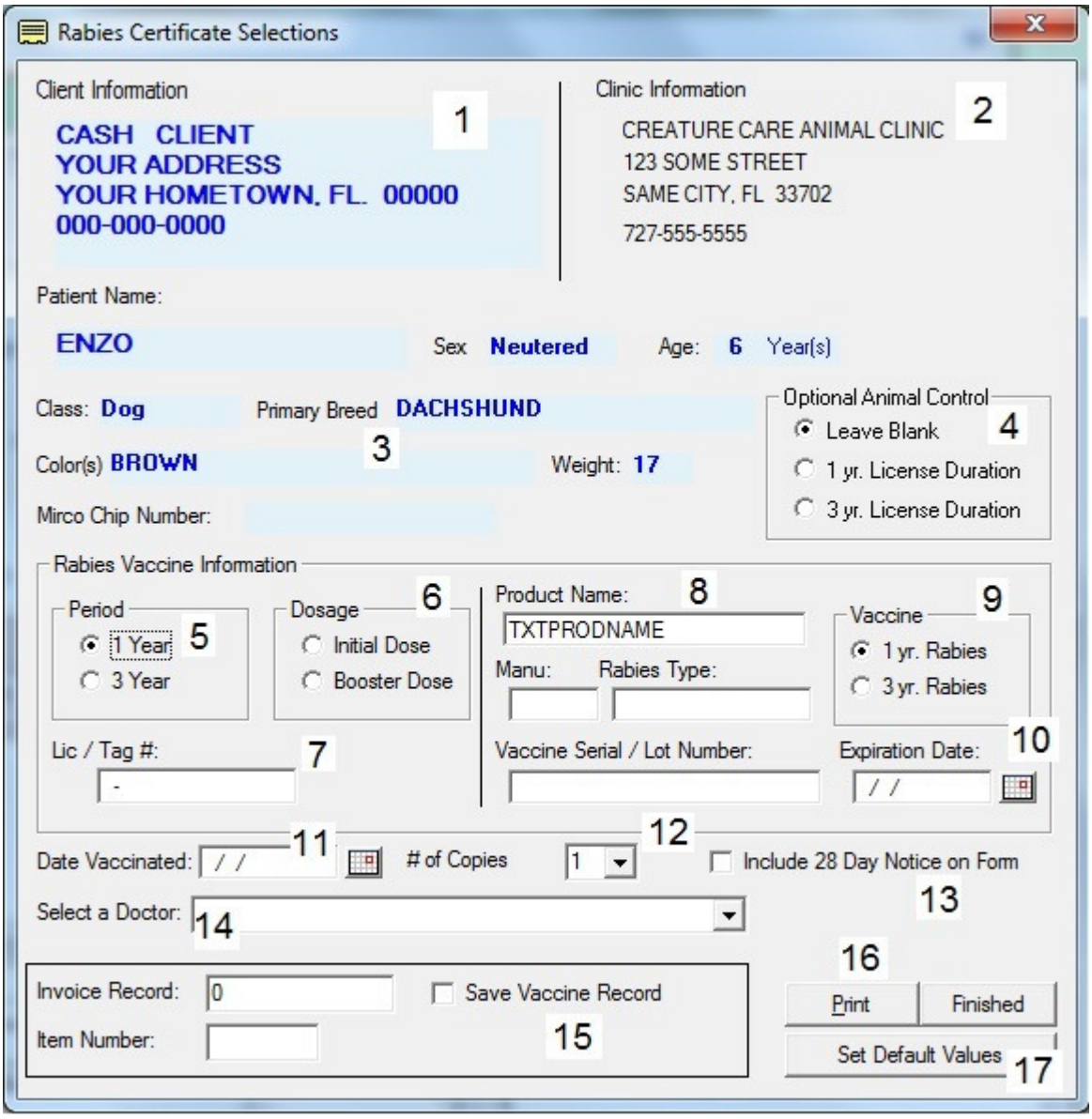
4.1 Rabies Certificate

A Rabies Certificate can be created by selecting the Green Client Print Options button on the lower center right portion of the Client / Patient / Checkout screen.



Select 'Rabies Certificate' from the menu. If prompted, select a Patient. The Rabies Form will load available information from the database. The user is notified of any missing 'key' information that will prevent the creation of the certificate. Once the missing information has been provided, repeat the previous steps to open the form.

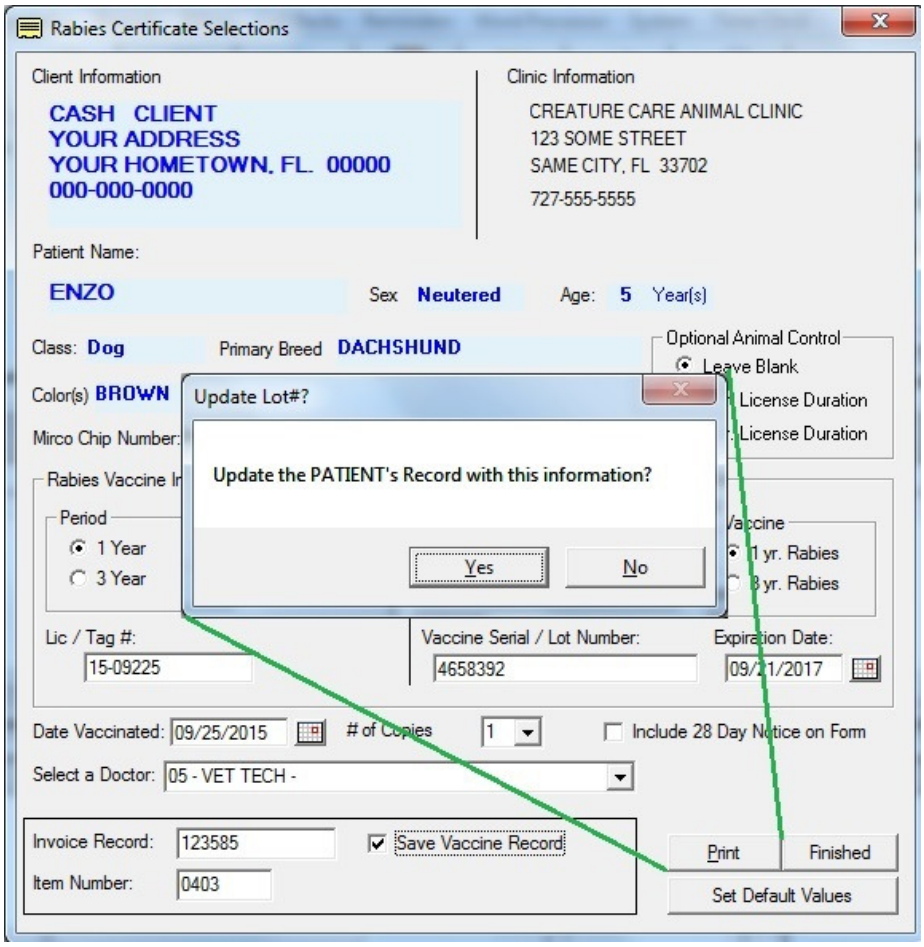
4.2 Rabies Input / Edit Information Form



Rabies Form Information

1 Client Information
2 Hospital Information
3 Patient Information
4 Optional Animal Control
5 Period for this Vaccination
6 Initial or Booster Dose
7 Rabies or Lic # Info
8 Product Information
9 Product Period Duration
10 Product Expiration Date
11 Date Vaccinated
12 No of Copies to Print
13 Print Notice on Cert
14 Doctor / Dept
15 Optional Record Info
16 Print
17 Edit Default Settings

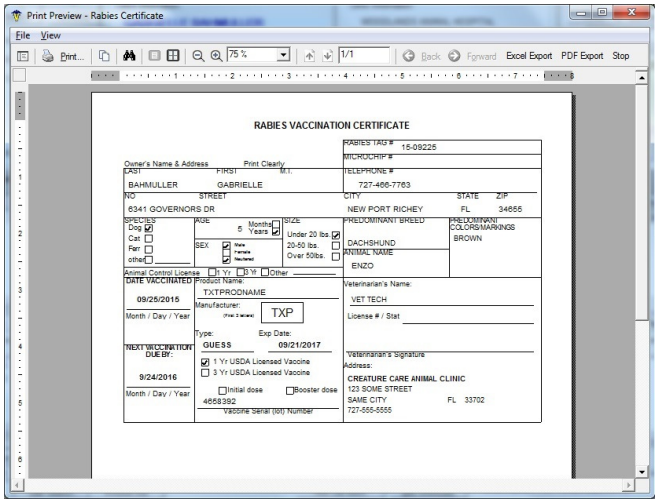
4.3 Rabies Printing



Once the form is completed, and the staff member selects PRINT, the program will check for required information, and if found, will give the staff member instructions to correct the issue.

If all is good, the information may be saved to the Patient information as well as possibly create a Rabies Record for this Certificate.

(The @R code attached to Rabies Items in Inventory tells the program the Item(s) are Rabies, which will automatically trigger and initiate the Rabies Certificate screen to pop up, at Invoice Generation. This is the time at which the staff member has actually initiated the Posting Transaction.)

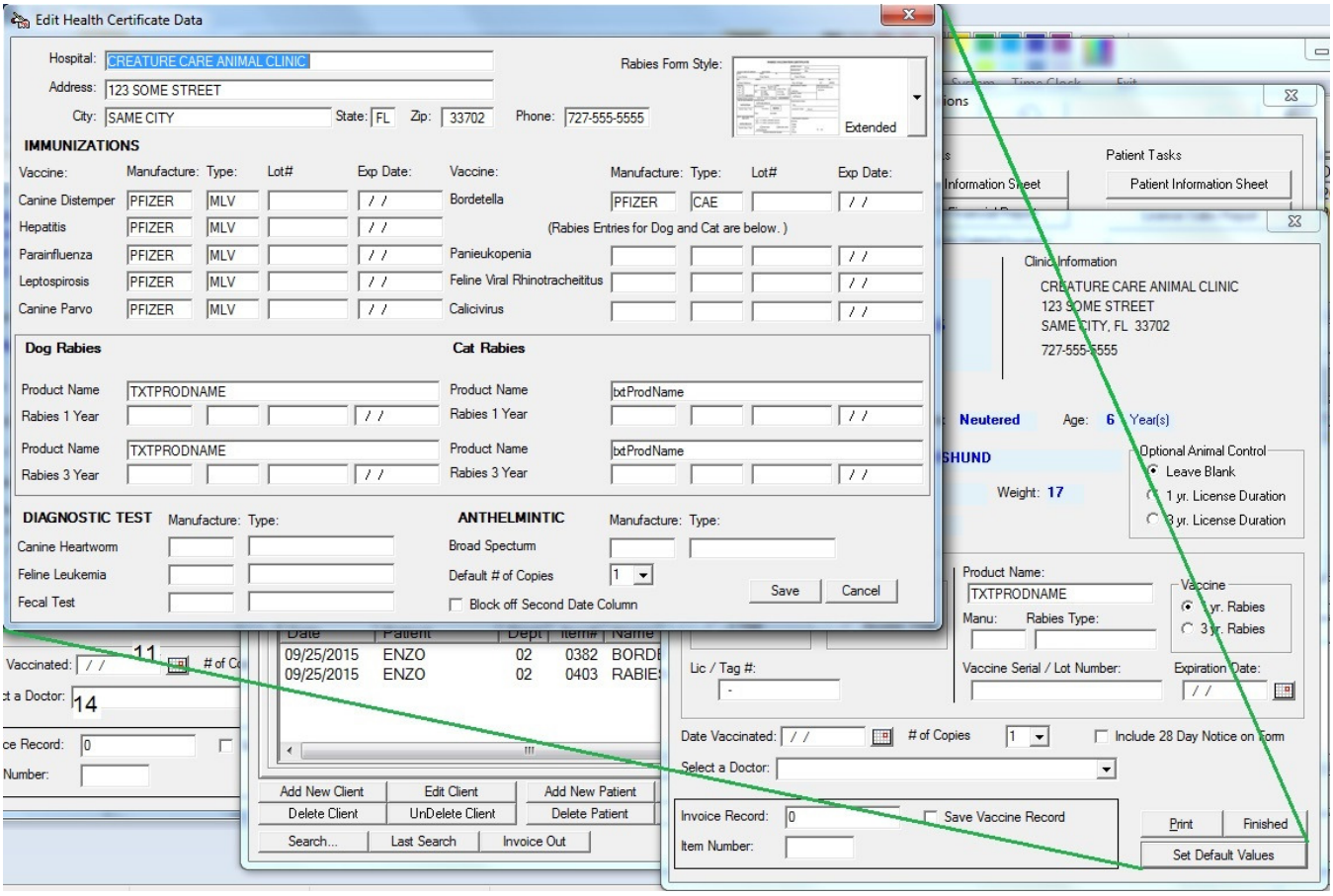


From Client / Patient Print Options:
The Certificate will display in a Print pre-view screen if filling out the form from the Client / Patient / Checkout screen.

From Invoice Generation:
Completing the form during the Invoice Posting, automatically prints the Rabies Certificate without this Print pre-view.

4.4 Rabies Default Information Settings

In the lower right corner of the Rabies Form is a button labeled, Set Default Values. Selecting this button opens a form that contains information for populating the Rabies form.



Pre-filling the information available in this form, will make this information available for the Rabies Certificate. This saves time by not having to type this information EVERY TIME a certificate is needed.

On the top part of this form is the Rabies Form Style selection option. There are two forms available to use. One has more information provided, while the other includes just the basics. Choose the form that is best suited for your location.

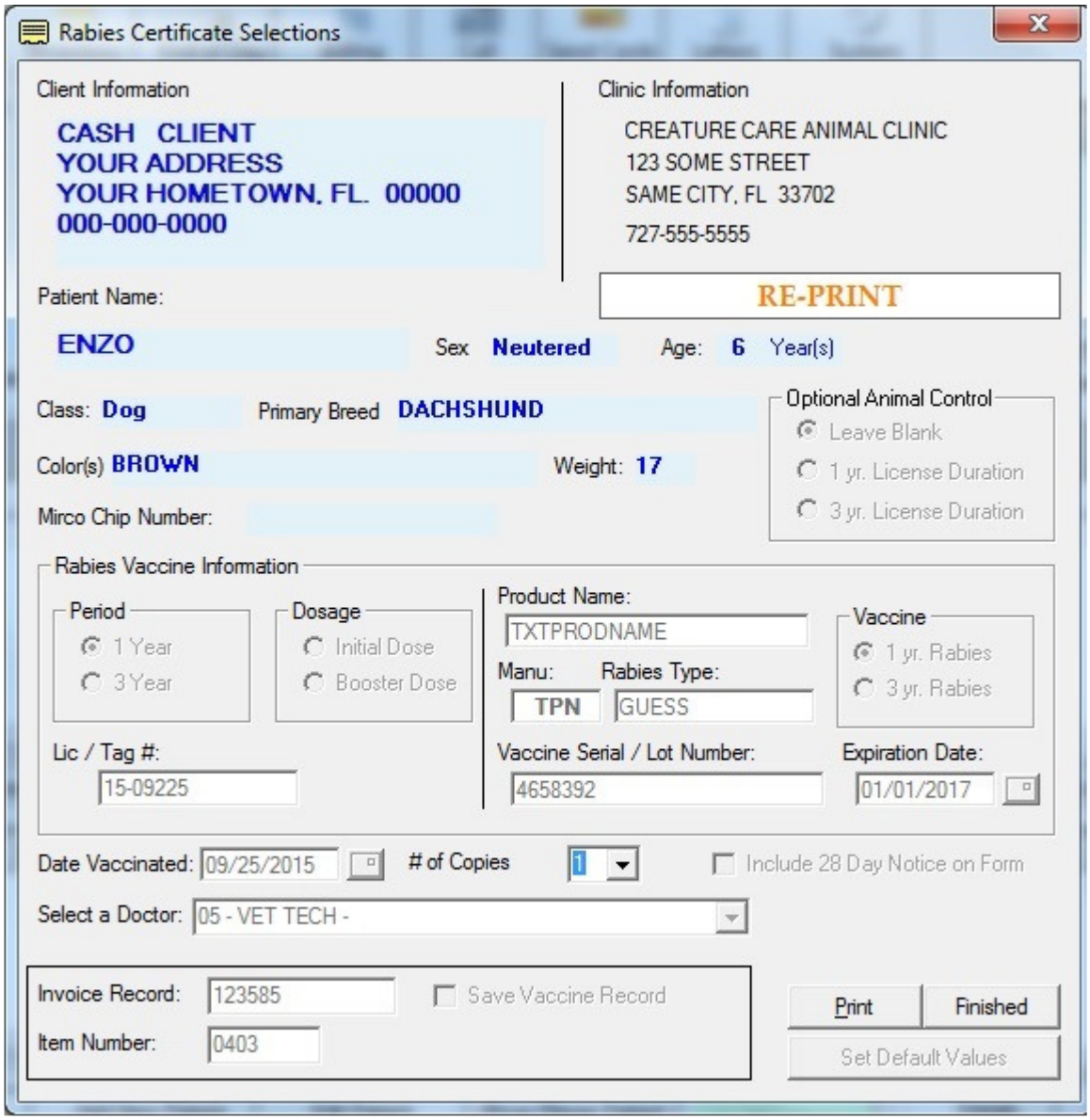
4.5 Rabies Certificate Re-Prints

Re-Prints of Rabies Certificates can be accomplished from the Client / Patient / Checkout screen. There are some options to consider for this.

1 Previously issued Certificates prior to v. 3.0 will not have a Rabies Record to reference for the document.

- Creating a Certificate and Printing is accomplished using the instructions previously outlined.
- IF a permanent record is desired, just provide the Invoice, Item, and check the Save box.
- When the Certificate is printed out, the Staff member will be prompted to Save the information.

2 If a Rabies Certificate Record is not desired, simply leave the "Save" check box, un-checked.
3 Re-Prints CAN NOT BE EDITED NOR CHANGED, and will be noted as Re-Print on the screen.



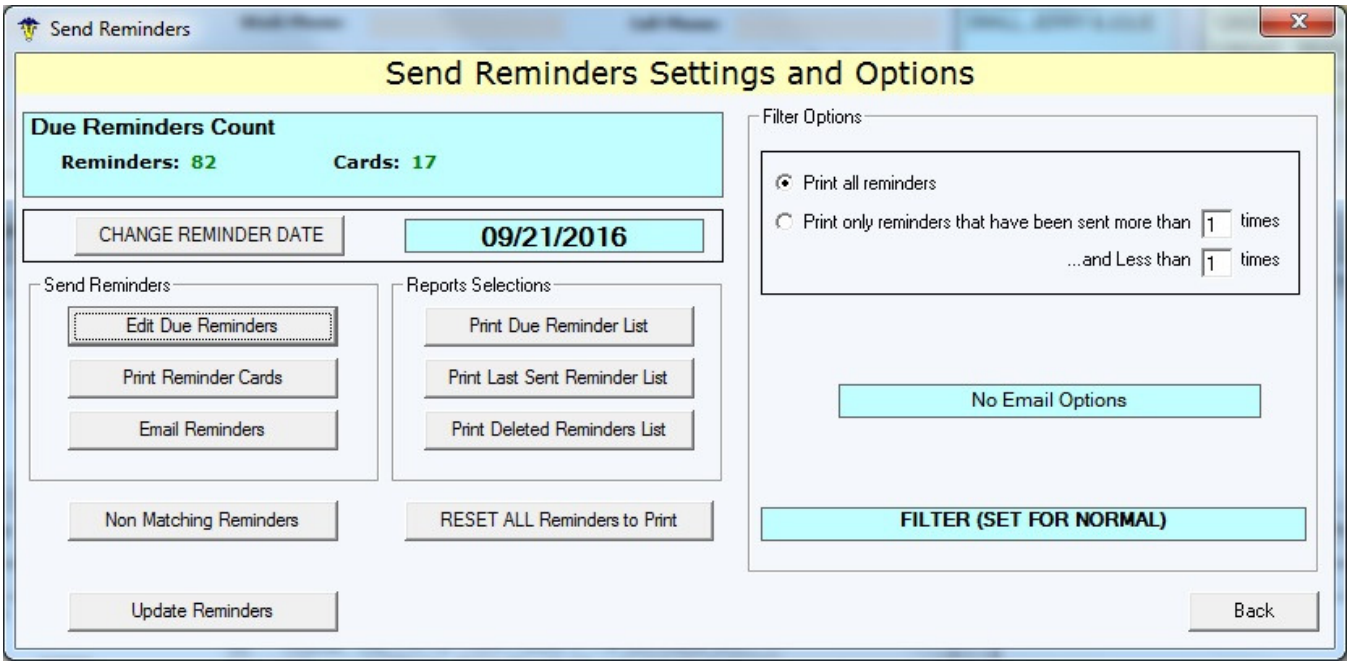
4.6 Rabies Certificate Correction

Yes, we all make mistakes. While records are supposed to be permanent, there are occasions where it is necessary to correct a Rabies Certificate Record.

This information is delicate and critical in nature, and as such, will NOT be provided in this document. Contacting NetCom-PS, Inc. directly with authorization will provide you with the necessary steps to accomplish these tasks.

5 Send Reminders Form

Options for Sending Reminders have been consolidated into one form to maximize its effectiveness.



Email server settings must exist before any of the Email Reminder Options are available for selection.

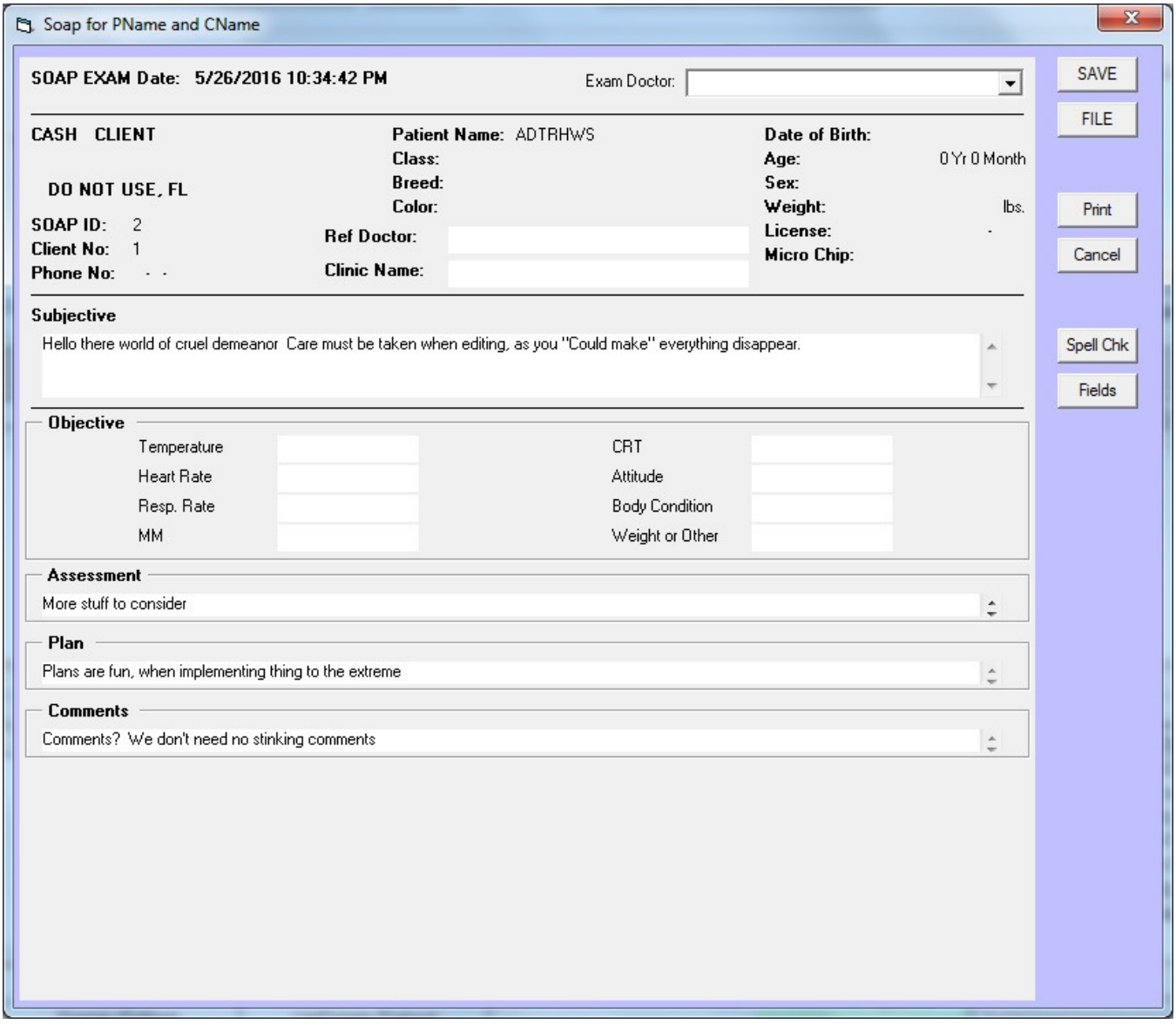
Passwords and confirmation messages are double and triple in nature to assist in the prevention of making undesired / unexpected changes to the data by mistake.

By Default, the Current Day's Date is selected for reference of what reminders are due. Changing the reminder due date, will change the Color of the Date Selected to **RED** aiding in determining that the date is NOT 'Today'.

6 SOAPs

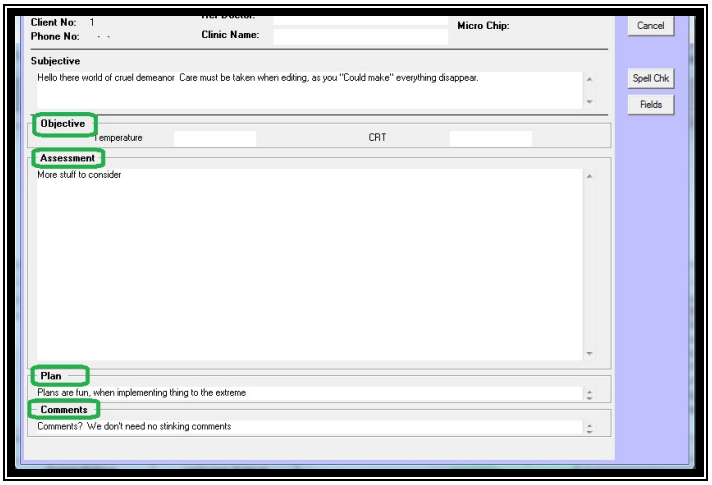
The SOAPs are available for Patient information records and have been improved. The SOAP form, while it contains a LOT of information, it is very difficult to present ALL the information available all at once. So, the all the areas are reduced in size to the bare minimums, so that the entire form can be displayed on the computer screen.

6.1 Main SOAP View



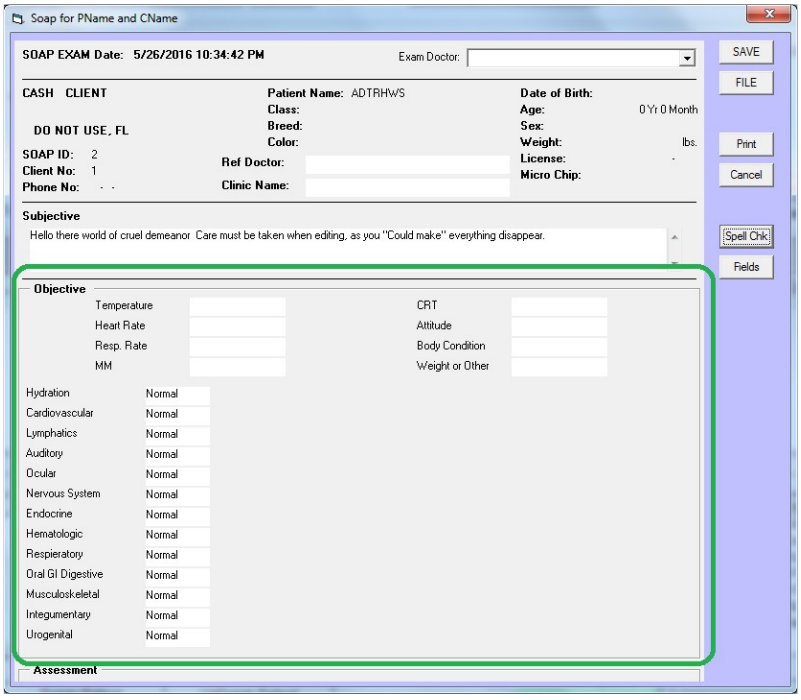
6.2 Topics (Subjective, Objective, Assessment, Plan, Comments)

Clicking on the Topic Header Names, will expand each of these areas to view / edit the information contained within. Clicking on the Topic Header Names while the area is expanded, will collapse the particular area so that other parts of the information can be viewed.



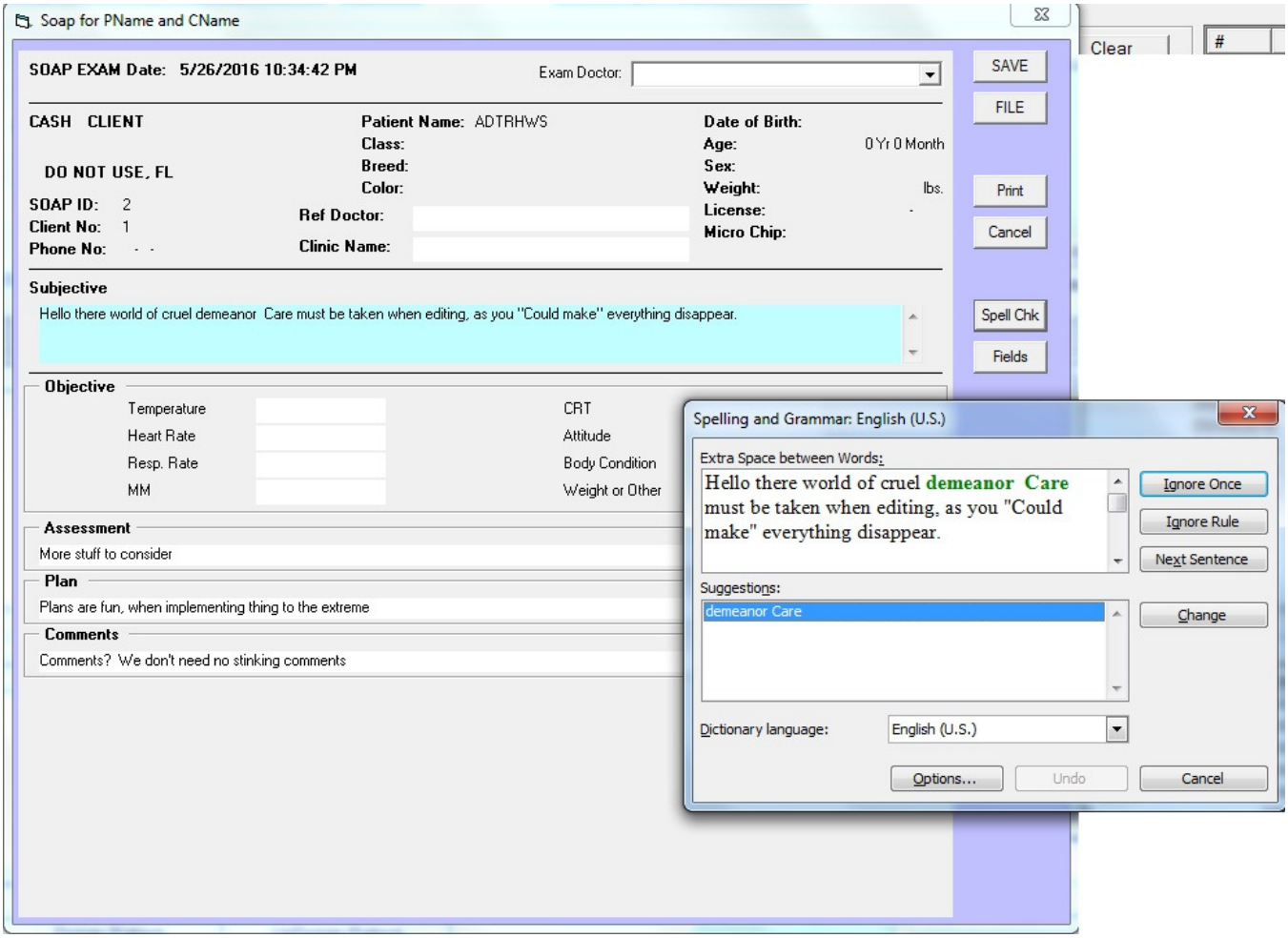
The **Objective** area about has been shrunk to allow additional space to view the Assessment area. Clicking on the Assessment name above, will cause the Assessment area to shrink in size similar to the Plan and Comments area above.

Clicking the Objective name once, while in this 'one line' sized state, will expand it to show the 8 normal observational conditions. Clicking on the Objective name again, will expand it to show ALL of the available observational fields.



6.3 SOAP Spell Check

Spell checking is a versatile feature that was added some time ago. The initial release simply checked ALL areas in sequence when selected. This has now been changed to only check the area currently being worked with.

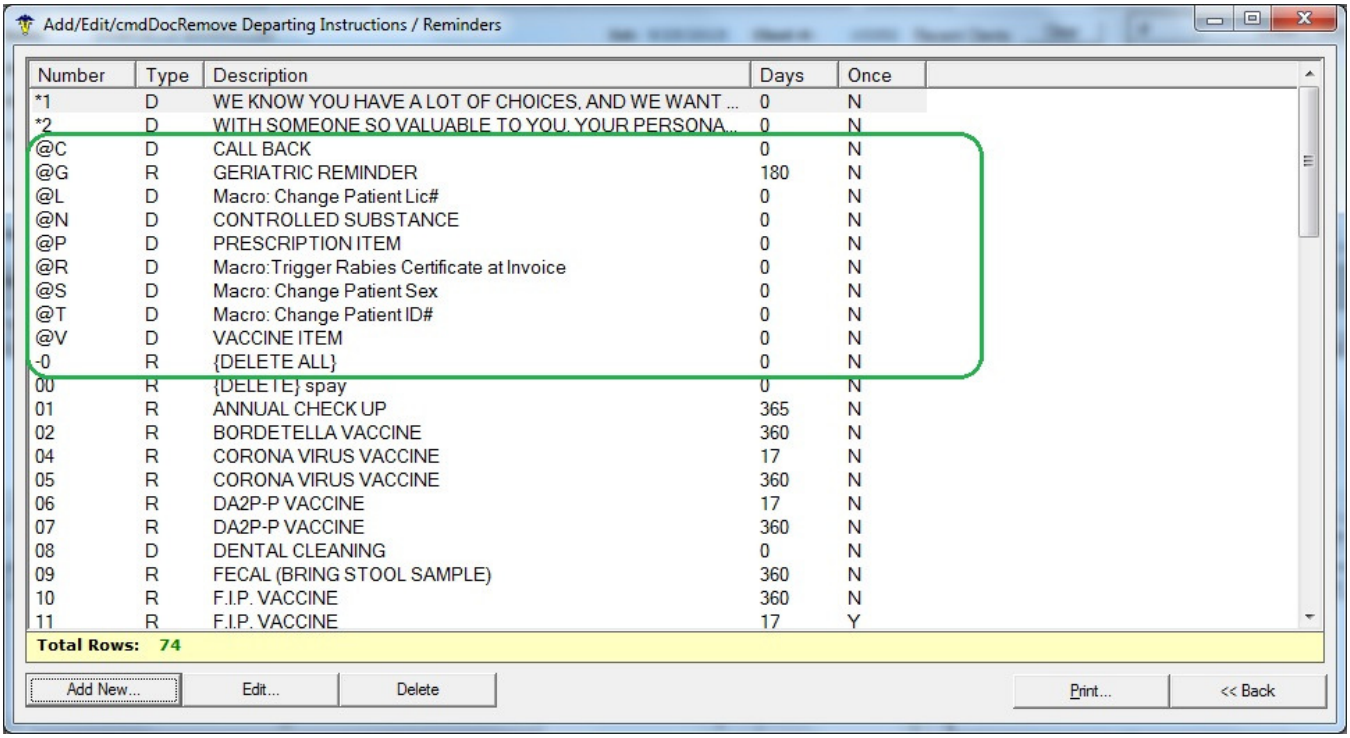


The background color of the area being Spell Checked will change colors to indicate that area being worked with. When completed, the background color will return to normal.

To check another area, place the cursor within the text of the area, and select the Spell Check button again.

7 Macro Check

The latest Vet Utilities 3.0 has an option to Check for: and add: missing @{?} macros. Macros are used to facilitate various actions within The VET System to automate many processes.



EXCEPT for the Geriatric macro: @G ALL other Macros are entered as type “D” Departing Instruction rather than type “R” Reminder.

The Descriptions viewed above are NOT that important, other than to give the Staff member a reference as to what they do. The program reacts to the Macro number to perform its functions internally to the application.

8 Standard Menu Options and Misc

The VET System v. 3.0 retains most of its keystrokes, layout, form and function from its past versions. However, there have been some areas that were changed.

8.1 NEXT or PREVIOUS Client

Has been removed and no longer needed. By adding the "Recent Client" list to the Client / Patient / Checkout screen, only the Clients that are really being used are available, thereby saving CPU time and memory resources.

8.2 Right Mouse Click Options

Are available on many of the forms. Not ALL options are available from these menus, but the most used, or selectively needed options are. Some things, like the removal of items are buried within these right click options to help prevent accidental, (or even on purpose) deletion of data or information.

Not ALL Items have Right Click options. To find out, place the mouse pointer over an item, then press and release the Right button on the Mouse. If there are Menu options available, you will be rewarded with a Pop Up Menu to select from.

If you don't get the Pop Up you wanted, Write your Congressman.

9 Hospital Header Edit System Utilities

The following two options are available in System Utilities: Settings Page 3: Edit Hospital Header

9.1 Optional Invoice Graphics

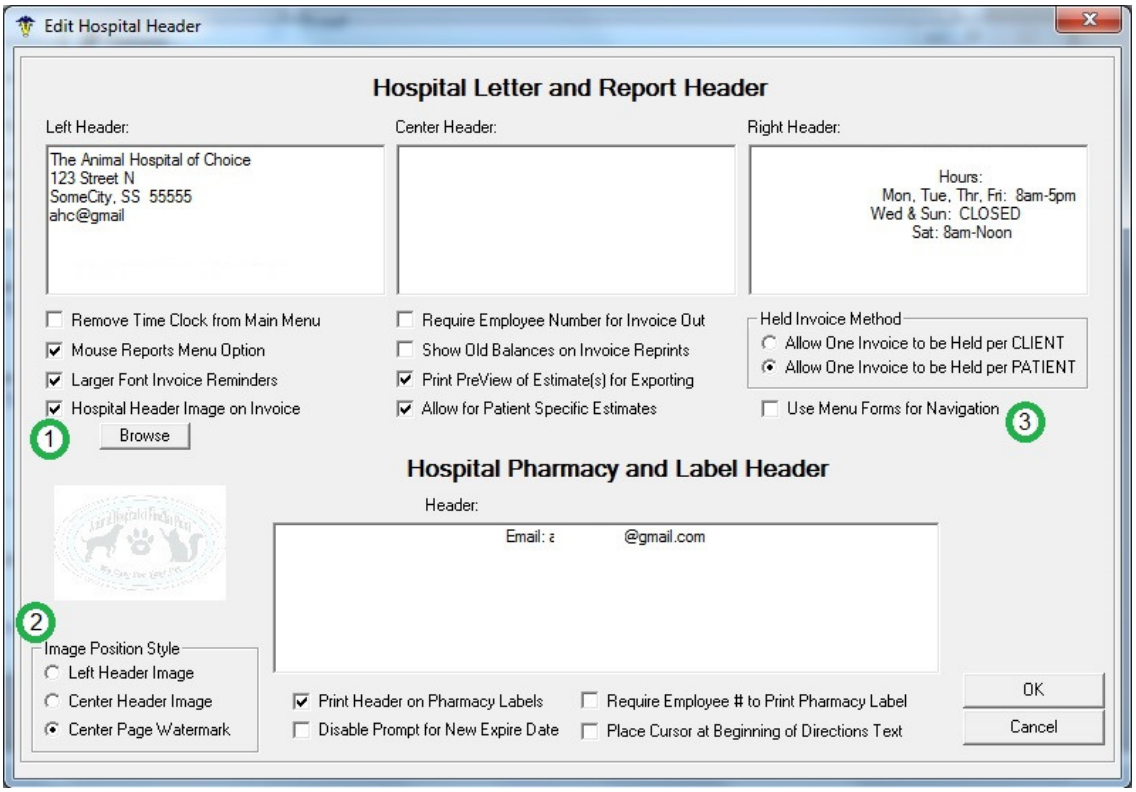
Prior to v 3.0, a Clinic could add a logo or image to the Left side of an Invoice, that would appear to the left of the Hospital Header. Now, in addition, the image can be positioned Center in the Header area, or placed in the middle of the Invoice Page. By using a 'washed out' image, this Center selection may be used as a type of Water Mark on the page. A Great and CHEAP tool for advertising and marketing.

- Check Box "Hospital Header Image on Invoice (opt#1 in illustration below)
- Click Browse to locate the File Image to use, and Select
- Select Image Position and Style (opt#2 in illustration below)

9.2 Menu Option

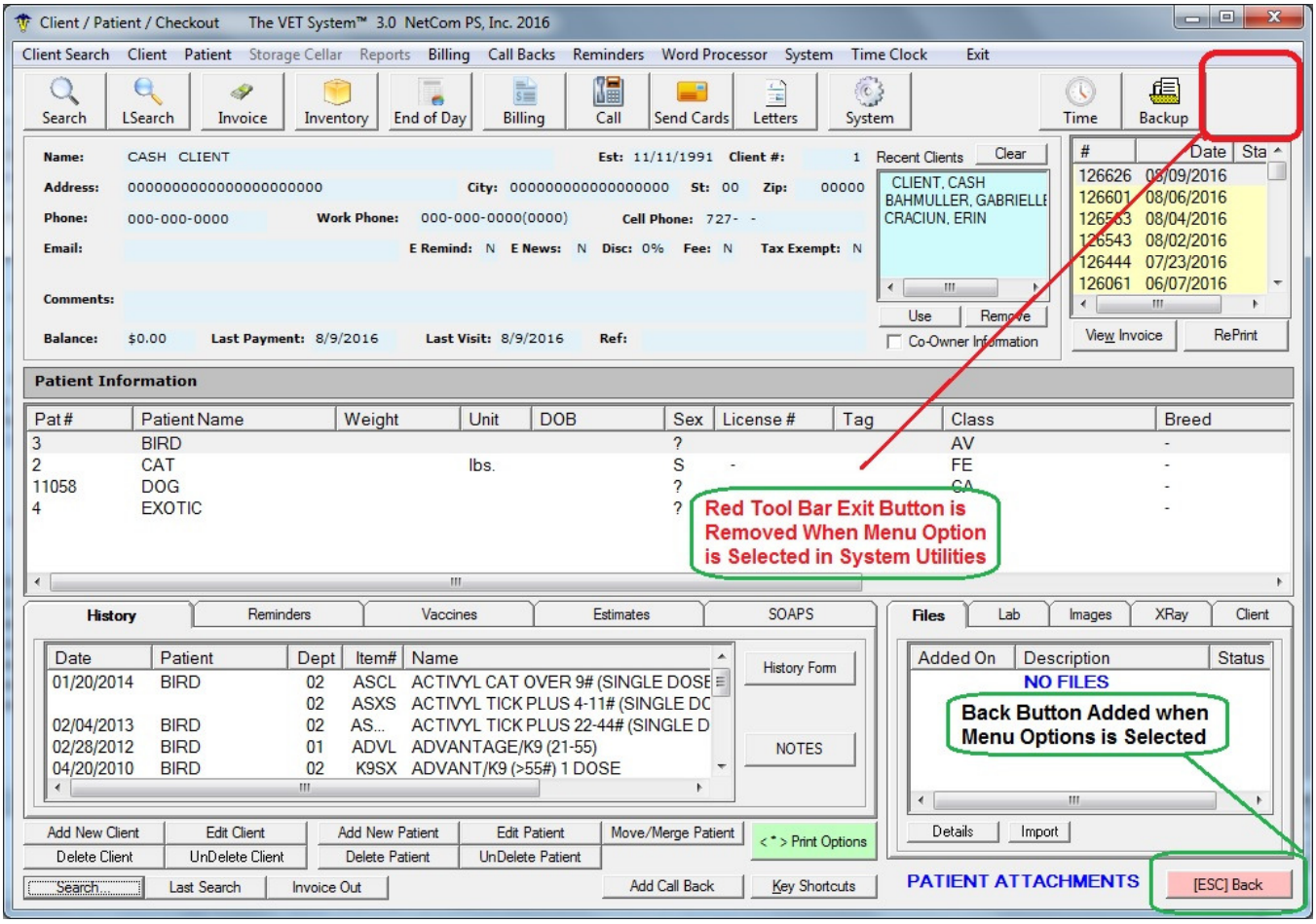
Is Still available. If you prefer the Menus option to navigate the program, this setting is available in System Utilities.

Selecting the 'Use Menu Forms for Navigation' (opt#3 in illustration below) on the 'Edit Hospital Header' page found in System Utilities, will restore the program to what you're accustom to using.



10 Exit Options

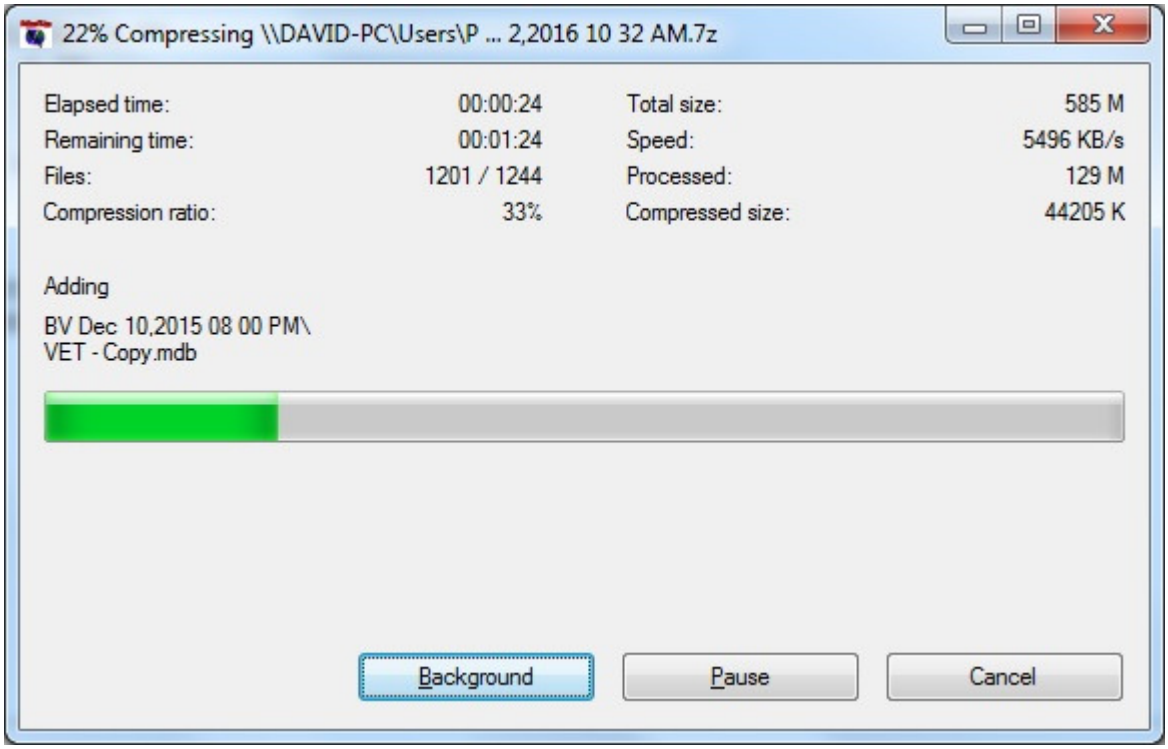
When using the Standard Menu option, the Red Exit button on the Button Tool Bar is removed. In stead, the normal "BACK" button normally found on the Client / Patient / Checkout form is placed in its regular location.



11 BACKUP

11.1 NORMAL

The standard backup that is normally completed at the end of day has been updated to give the staff members a clearer status of how the backup is completing.

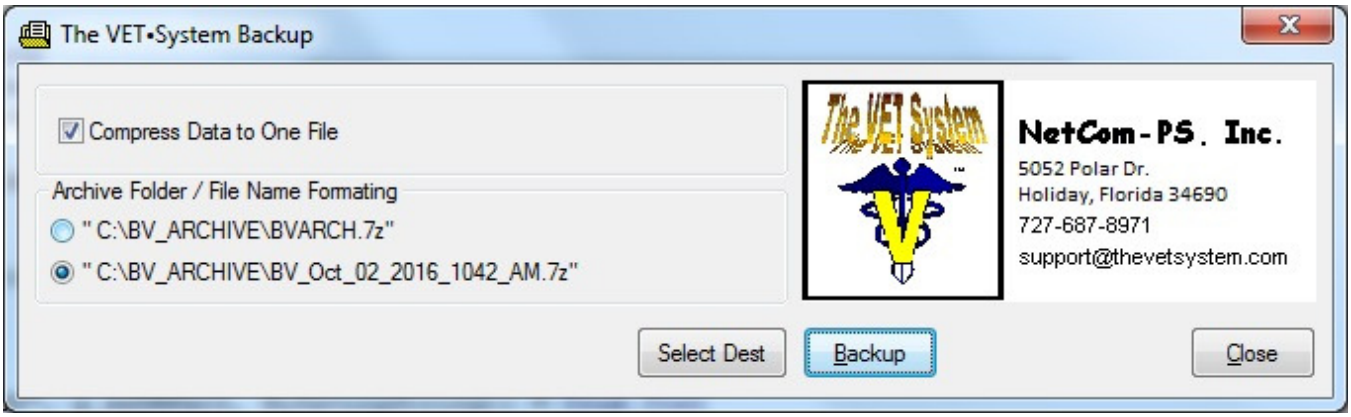


There is much more information available, as well as the ability to ‘Pause’, ‘Cancel’, or run the process in the ‘Background’.

11.2 OPTIONAL BACKUP

The “Optional Backup” is available on the Menu Tool Bar, and from the Button Tool Bar.

- Each Menu access is Password protected and Requires the Manager’s Password.
- The backup allows for the use of a USB, External and/or Network Mapped drive locations for saving the data.
- This Utility is beneficial in that it allows management the ability to do a quick backup for off site safety aside from the normal Backup Utility that runs when opted at Program Exit.



- **DRIVE ONLY** backups have been replaced with ability to Select Drive, and Folder location desired, by selecting the ‘Select Dest’ button.
- **Backup Options** are available on the PC that is the SERVER ONLY.
- **Optional Backup Buttonbar Menu Button**.
    - Option ONLY available on the Server and Requires Administrator’s password to ADD the button to the Tool Bar display.
    - Button May be Removed without Administrator’s Password.
    - Backup Button on the Button Bar is REMOVED PCs that are NOT the Server.
    - Backup Menu is Disabled on PCs that are NOT the Server.