The VET System Estimates Guide

Table of Contents

Estimates for The VET System

The VET System has the ability to create Estimates for Patients that can be used in a variety of ways.
- Create 'Generic' estimates from which to base future Invoices for particular Patients.
- Create individual estimates for a Patient on the fly without using a 'Generic' estimate template.
- Create an estimate based on a Held Invoice or Invoice in Progress.
- Edit an existing Held Estimate
- Create additional estimates for the same service using different options.
- Estimates are viewed and grouped for EACH Patient separately and are NOT grouped together with other Patients of the same Client.
- Available 'Generic' estimates are displayed for selection for ALL Patients

Because of the flexibility that is offered, it is very easy to do a wide variety of things involving estimates. The program follows a few simple rules that you must keep in mind so that the program does what you wish for it to do.

Estimates General

Generic estimates are estimates that are created and available for use for ALL Patients as a basis for creating Invoices and or Patient Specific Estimates.

Generic Estimates:
- Are created and Held under the CASH CLIENT
- CASH CLIENT estimates are available for use for ALL Patients They are marked as, "Generic" in the selection screen
- May ONLY be edited from the CASH CLIENT account
- The CASH CLIENT Patients DO NOT have the {EST} next to the Patient Name when estimates are Held
- Are used to create an Invoice for a Patient based on the estimate
- Pricing for an Invoice that was based on an estimate DOES NOT CHANGE, when Inventory Pricing Changes

Patient Estimates:
- Can be created from Generic Estimates
- Estimates can be created from Pending Invoices
- Names of Estimates can be Identical to Existing Estimates
- Can Create an Invoice Based on the Estimate
- May be deleted, Printed, Viewed, Edited
- Can NOT be used for another Patient

Creating Estimates

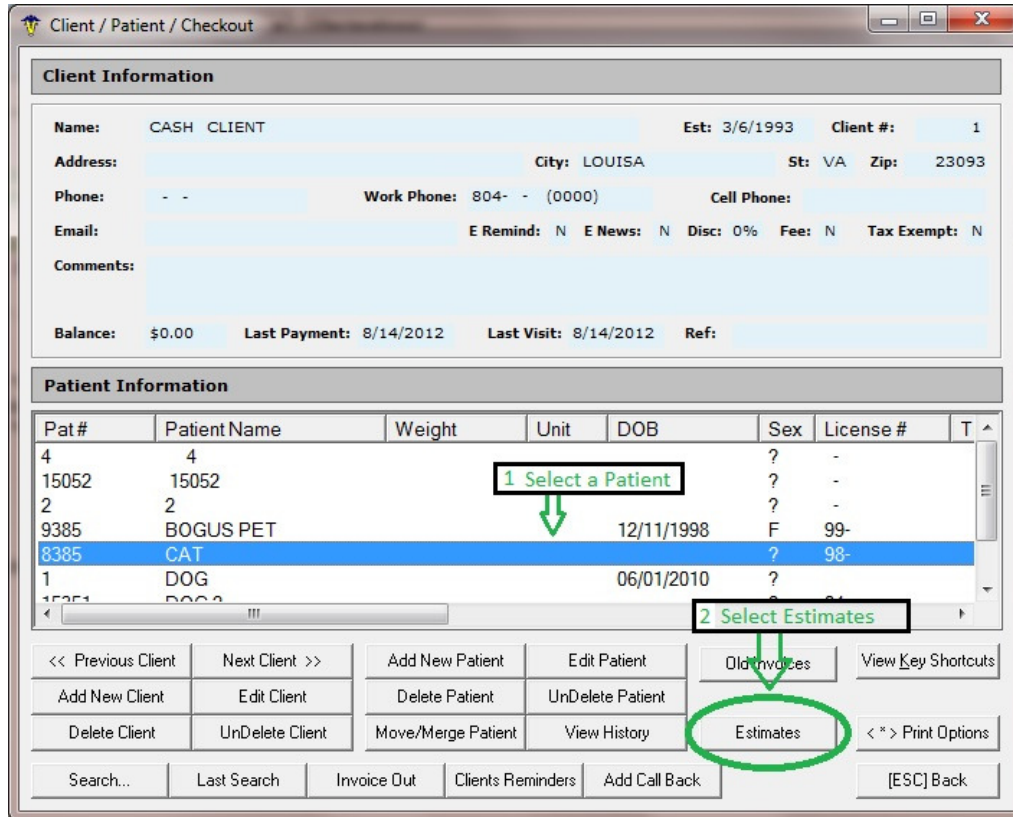- Select Client / Patient / Invoice from the Main Menu of The VET System.

Figure 1 Client Patient

- Select a Patient by highlighting the desired Patient line.
- Select the Estimate button on the Client Patient screen. **[Figure 1 Client Patient]**
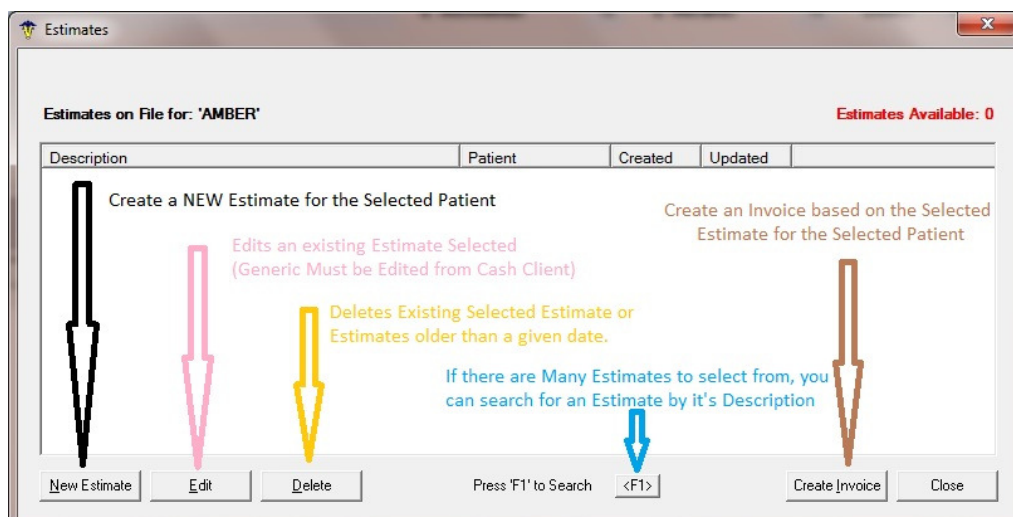- Select 'New Estimate' to create a new Estimate. **[Figure 2 Estimate Select]**

Figure 2 Estimate Select

- Add items and pricing according to your specifications.

Figure 3 Estimate Items

- If printing this estimate is not needed:

  o Press the ESC key, or press the Cancel button. You will be prompted to Save the Estimate.

Figure 4 Prompt Save

o Give the Estimate a Distinctive Name and click OK.

Figure 5 Prompt Name

Printing or Print Pre-Viewing

- If Printing or Print Pre-Viewing IS needed:

  o Press the 'END Next' button or END Keyboard Key **[Figure 3 Estimate Items]**

Figure 6 Billing

o Press the END button on the next screen **[Figure 6 Billing]**

Figure 7 Billing Option

- o Select Estimate **[Figure 7 Billing Option]**
- o Print or View the Estimate
- o Close the Estimate View after printing, or viewing is complete
- o At this point, you will be prompted to Save the Estimate or hold it as an Invoice.
- o Save the Estimate by giving it a unique name
- o This will return you to the Client Patient Screen

- A BLUE 'Held Estimate' marker will appear at the top of the Client Patient Screen for this Client where an Estimate was created for a particular Patient.
- The Patient for whom the Estimate was created will have the {EST} indicator placed directly after the name of the Patient to indicate there is an Estimate on file for this Patient.

Figure 8 Held Estimate

Optionally, you may wish to choose to Hold the Estimate as an Invoice instead.

  - Simply Select the Hold Invoice Button **[Figure 7 Billing Option]**
  - The Estimate will then be held under the Patient Name as a held Invoice
  - Item Pricing will be Fixed for this Held Invoice
  - This action DOES NOT remove, or Delete this Estimate.

Editing Estimates

Estimates may be Edited to meet new needs or changes as required by the clinic. Generic Estimates may ONLY be Edited from the CASH CLIENT. Any attempt to Edit a Generic Estimate from any other Client will remind the staff member of this limitation.

To Edit an existing Estimate:
- Select the Client who owns the Patient **[Figure 1 Client Patient]**
- Select the Patient from the Patient List with the {EST} indicator next to the Patient Name that has the Estimate you wish to Edit.
- Select the Estimate Button on the Client Patient Screen
- Select the Estimate from the List for this Patient that needs to be Edited **[Figure 2 Estimate Select]**
- The saved Estimate will be loaded.
- Make the changes desired.
- If printing is NOT needed:
    - Press the ESC key on the keyboard, or press the Cancel button in the lower right corner **[Figure 3 Estimate Items]**
    - At this point, you may keep the name for this Estimate the Same or Change the Name.
    - If the Name is Left Blank, the Name is set to: "NO DESCRIPTION"
- If Printing IS needed:
    - Press the END key on the keyboard, or press the 'END Next' button. **[Figure 3 Estimate Items]**
    - On the next screen Press the END key again **[Figure 6 Billing]**
    - Select the Estimate Button **[Figure 7 Billing Option]**
    - After finished Printing or Viewing the Estimate, close the View window
    - At the prompt select to save the Estimate or Hold as Invoice **[Figure 9 Estimate Option]**
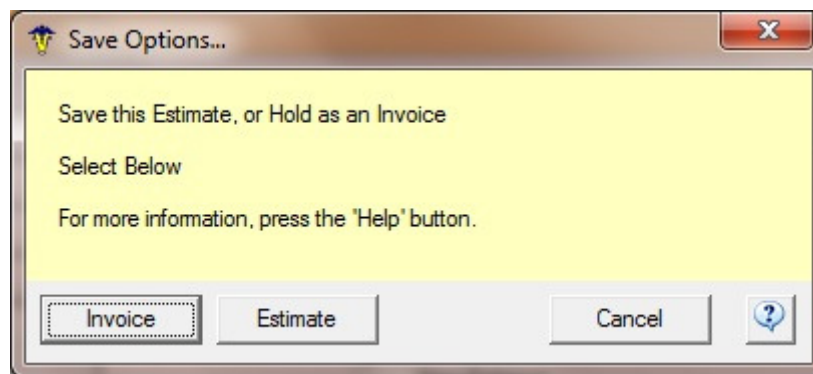

Figure 9 Estimate Option

- Saving the Estimate, will update the Estimate with the current values along with modifications to the Name of the Estimate if changed.

Optionally, you may wish to Hold the Estimate as an Invoice instead.

- o Simply Select the Hold Invoice Button
- o The Estimate will then be held under the Patient Name as a Held Invoice
- o Item Pricing will be Fixed for this Held Invoice
- o This action DOES NOT remove, or Delete this Estimate.

Note: If you modified the Estimate during this session, and DID NOT SAVE the Estimate first, the Invoice Created will be based on your changes, but the Estimate will retain it's original contents.

Deleting Estimates

Deleting Estimates is pretty much straight forward.
Generic Estimates may ONLY be Deleted from the CASH CLIENT.
Generic Estimates may ONLY be Deleted One at a Time.
Optionally, it is possible to Delete ALL NON Generic Estimates for ALL Patients where the
Estimate date is older than a date provided.

Delete Patient Estimate

- Select a Patient with Estimate(s) Held from the Client Patient, Patient List **[Figure 1 Client Patient]**
- Select the Estimate Button from the Client Patient Screen **[Figure 1 Client Patient]**
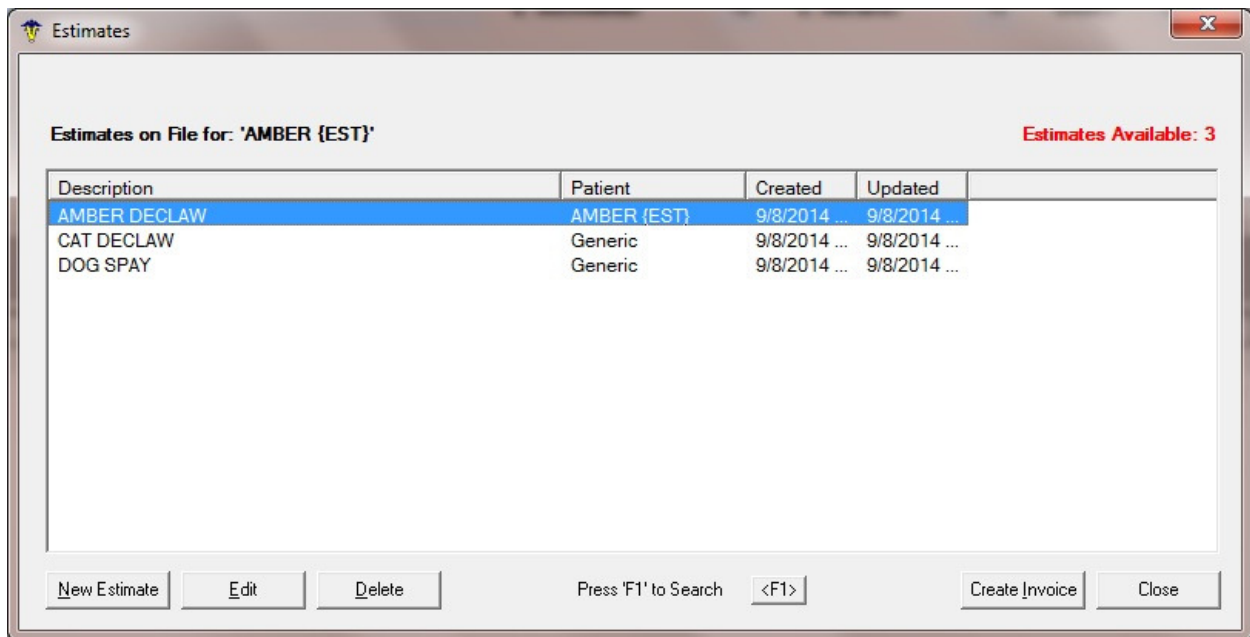- Select the Estimate you wish to Delete

Figure 10 Estimate Select

- Press the Delete Button

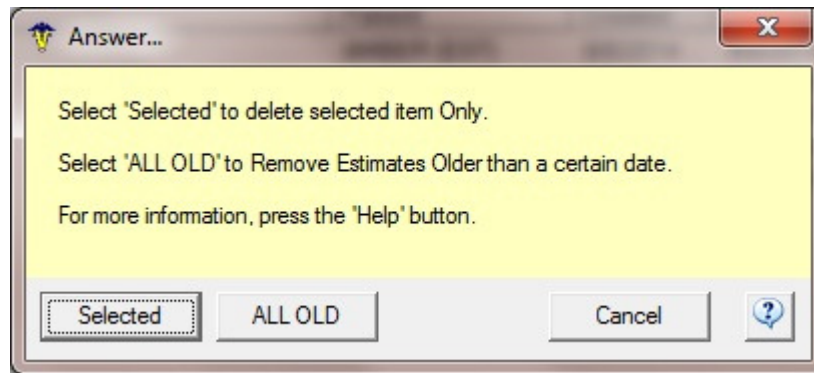- To Delete JUST the one Selected, Choose 'Selected'

Figure 11 Delete Select

- Choose, "ALL OLD', to Delete ALL NON Generic Estimates Older than a particular Date
- Manager's Password is REQUIRED to Delete ALL OLD.
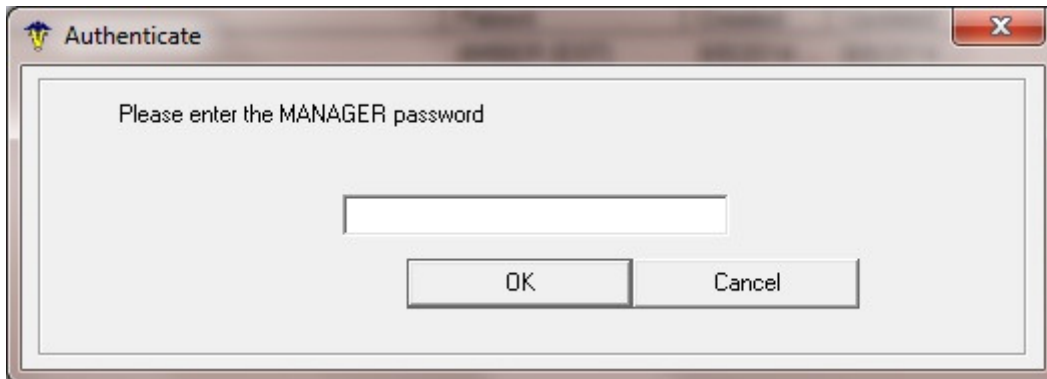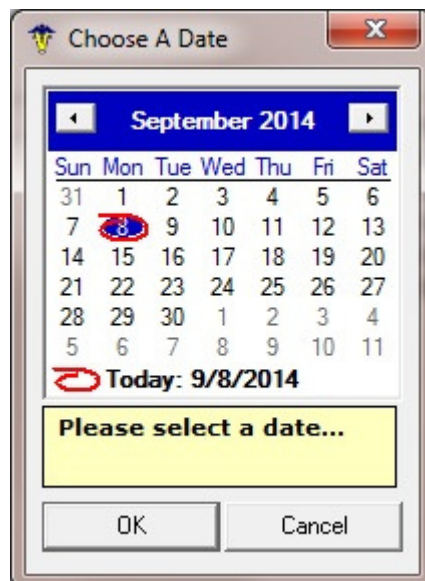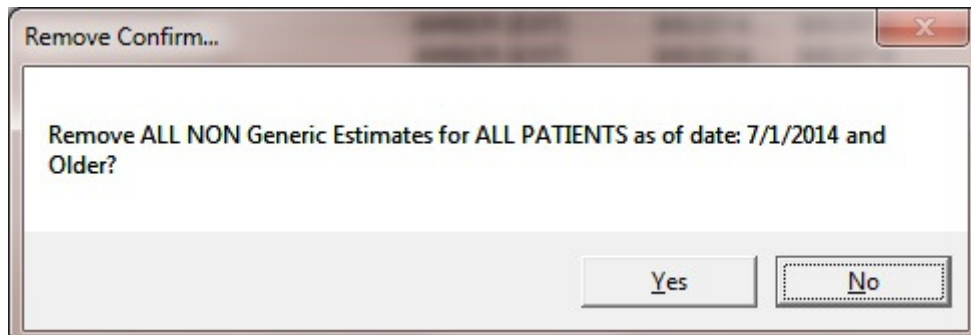

Figure 12 Manager

- Select a Date

- Confirm to Delete the Estimates

Figure 13 Confirm Delete

- If there are no Errors, you will get a Message box confirming the Deletion was successful.

Searching for Estimates

Searching for Estimates is limited to Searching within a Particular Patient. Often times there are MANY Generic Estimates to choose from, which is okay. Finding the specific Generic Estimate to use, is made simpler by typing a few letters of the 'KNOWN' description of what you're looking for. A list that matches what you type will help you limit your number of selections to choose from.

Note: Patient Specific Estimates ALWAYS appear first at the Top of the List of available Estimates to select from for a particular Patient.

The Date Created and Last Updated are also listed next to each estimate.

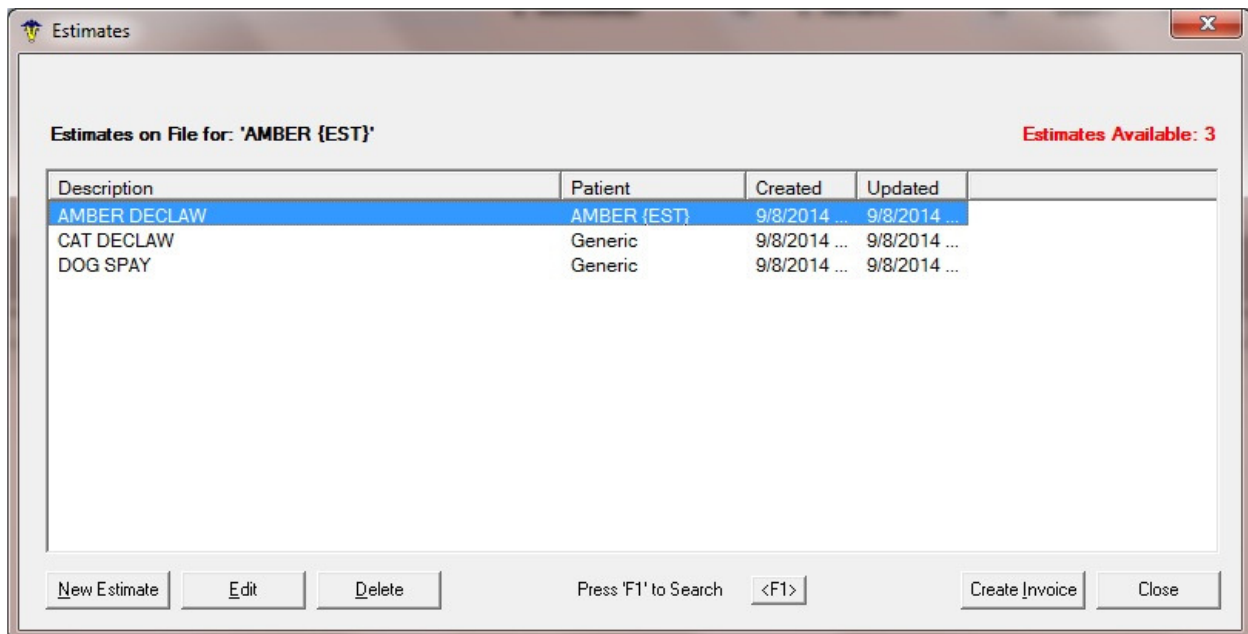- Select the <F1> button, or Press the F1 key on the keyboard to activate the Search

Figure 14 Estimate Select

- Type in the Text to search for.
- Press the GO button. (The <F1> button label changes to 'GO' when pressed)
- The Display will update with ALL the Patient Specific Estimates and ONLY those Generic Estimates that contain the Text searched for.
- Select the Estimate of your choice
- Select the Option of what to do with this Estimate. IE: Edit, Delete, Create Invoice

Creating Invoices from Estimates

This is perhaps the most useful tool involving Estimates. Generic Estimates can be used to create Invoices for Patients in a speedy fashion reducing the amount of time to enter items that are common for many procedures or routines.

Note: It is possible to hold ONLY ONE INVOICE per Patient. So if a Patient already has an Invoice Held, The VET System will Notify the Staff member about the pending Invoice and options.
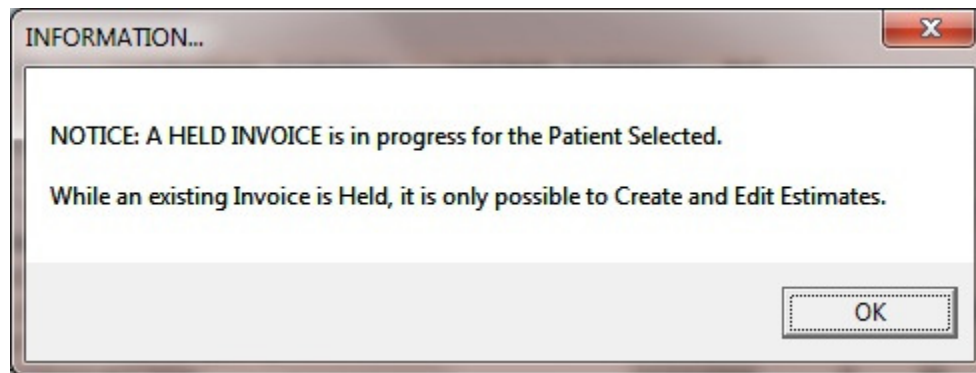

Figure 15 Already Held Invoice

While it is NOT possible to EDIT a Generic Estimate for a particular Patient, what we do is create an Invoice from the Generic Estimate, then we have the option later to Hold the Invoice or create a Patient Specific Estimate based on the Invoice started from the Generic Estimate.

I know, confusing. Here we go….

Creating an Invoice from an Estimate

- Select a Patient from the Patient list on the Client Patient Screen
- Select the 'Estimate' button on the Client Patient Screen
- Select the Estimate desired to create an Invoice of from the Estimate List
- Select the 'Create Invoice' button.
- A prompt will appear offering to change the Department credited for the items to be Invoiced for this Patient. Make your selection accordingly.
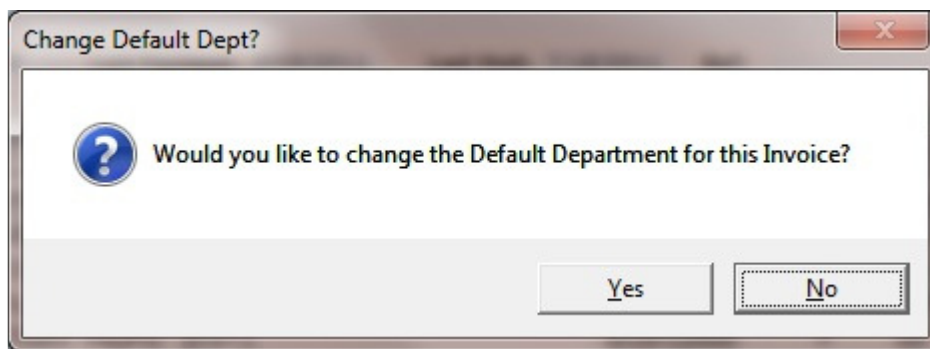
Figure 16 Change Department

- The VET System will load all the Estimate Items into an Invoice for the Patient

Figure 17 Invoice from Estimate

- The TOP of the Invoice Screen will remind the staff member that this Invoice was created from an Estimate and that Pricing is locked in
- Prices CAN BE CHANGED but must be over ridden on each item desired.

Note: Auto Pricing is normally enabled for regularly created Invoices where the Prices were not over ridden originally. In other words, the Items were added with their default prices. In this case, when ever an Invoice has been on hold, AND the Inventory Prices have changed since the last time the Invoice was viewed, the new, or current prices will replace the prices that were last saved.

Invoice from Estimate Options

After an Invoice has been created from an Estimate, whether from a Generic or Patient Specific type, there are two choices of what to do with this Invoice.

1) You may Hold the Invoice, either from the Invoice View Screen or the Billing Screen. (previously covered)
2) You may Select Estimate Invoice from the Billing Screen, which will eventually give you the option of Holding the Invoice, or Saving the Invoice as a Patient Specific Estimate. (See Section Printing or Print Pre-Viewing)