

# Case Notes

# Special Technical Tips Edition

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**T**his latest edition of Case Notes brings you another set of hints, tips and recommendations to help your Practice Management System deliver extra benefits to your business. Please ensure the newsletter gets circulated to all your staff responsible for your computer system – the answer to their next question might just be on the following page.

Welcome too, to our many new users. During the course of the past few months we've had a considerable number of Practice Master and Megavet conversions to PremVet5, strayers returning from the pre Nagle days, new PDSA sites, brand new users of both RoboVet3 and PremVet5, and of course our recently acquired Vetwise customers.

Whether you've been using our computer systems for ten years or ten days there's bound to be a new feature you would find valuable in your practice.

We adopt a development policy based on meeting our users' requirements. On the Windows side of the house, RoboVet users who have upgraded to version 3 have a whole bundle of new features including more management reports, enhanced stock control, batch number traceability, and more stable synchronisation software.

For the PremVet5 users, the most significant change is a new reporting tool, Data Major. This new tool is based on a technically advanced high speed database allowing users to analyse practice performance in a matter of seconds. The reports can be presented in tables or graphically, utilising Microsoft tools such as Excel and Access.

Naturally, the software upgrades are free of charge for all supported users. Remember, if there are features you believe should be added, please tell us. We can't do them all at once but we'll have a go!



Vet solutions



# How do I do it with PremVet5?

## How do I . . . get PremVet5 to remind me a pet is due something?

PremVet5's reminder system is capable of handling 255 different recalls! Of these 255 you can allocate any 10 to any one pet.

For example, take a new puppy. You could set PremVet5 up to recall this puppy for a puppy party a week after its first vaccination, in a couple of weeks for its second vaccination, in three months for worming and flea treatments, six months for an adolescent health check and in 12 months for its annual health check and booster vaccination. Add to that - reminders for weight checks, newsletters and the client's cheese and wine evening and nobody could say you're not keeping in touch with your clients' needs!

However, it's unlikely that you would want to send a postal reminder for all these (and other!) events, and the postman is unlikely to thank you.

So how do you go about reminding yourself and your staff that these things are due, without making your client feel you have nothing better to do than write to them every day telling them that they should be having something else done?

Simple, use the PremVet5 recall program to set up some 'pseudo recalls'. This is a recall where a little pop-up box appears on the client's management card when something from the recall screen is flagged as due. (NB: V(acc) accesses the recall screen from the management record.)



Pseudo recalls are those numbered from 240-252 within the recall setup (with the exception of recall 253 which is used to zero recalls). To set them up:

From a new style menu:  
 System > Setup > Parameters >  
 Lookup tables > Recalls > Recalls > Edit

You then enter the number of the recall you wish to add and follow the prompts on the screen to add the name of the recall. Use a colon and number of weeks after the name to tell the computer the interval you wish to have.

Eg. Edit recall number 200 to be Weight check:26 and this will pop up the weight recall 26 weeks (six months) after it was added.

From a classic menu  
 General > Parameters  
 Lookup tables > Recalls > Recalls  
 Edit

## How do I . . . look at a pet's laboratory results in a graph?

Recording a pet's laboratory results is very easy in PremVet5. As most of you will be aware, accessing screen number 1 on a pet's management card lets you record and read a pet's laboratory results separately from the clinical history. This is a lot easier than trying to locate laboratory results among pages of clinical notes and pricing. It can also save a lot of time when you are trying to read two sets of results, especially if they have been entered a few weeks apart.

What you may not know is that it is possible to show a set of laboratory results in graphical form. For example, if you have a pet suffering from a kidney problem you may have taken an initial set of bloods, started the pet on a course of treatment and then take subsequent bloods to see if your treatment is working.

The easiest way to see whether the results are showing an improvement is to look at them in graphical form. You may just be interested in the BUN or the creatinine results as a 'snapshot'. Go to screen 1 on the pet's card, and press the letter G for Graph from the prompt line at the bottom of the screen. The computer will ask you which test you wish to graph. Simply enter the first few letters of the test name, BUN for example, and PremVet5 will show a graph on the screen. Pressing C for Current will give you a bar graph.



NB: Ensure that the letters you are entering as the test you wish to graph, MATCH the first few letters of the test name when you recorded the result. There is not much point in searching for BUN if you originally recorded the test as a Blood Urea Nitrate result!

# How do I do it with PremVet5?

## How do I . . . use graphs on the clinical record page?

In the previous article you may have read something about graphing laboratory results. Did you know it is also possible to graph things such as weights and temperatures from a pet's clinical history?

Temperatures – firstly, you need to be adding your pet's temperature to its clinical history so that the temperature entries all have the same analysis code. (You will probably need to add a new analysis code to your existing file; refer to your PremVet5 manual).

The simplest way to do this is to set up an Automatic Pricing code.

From the main menu:

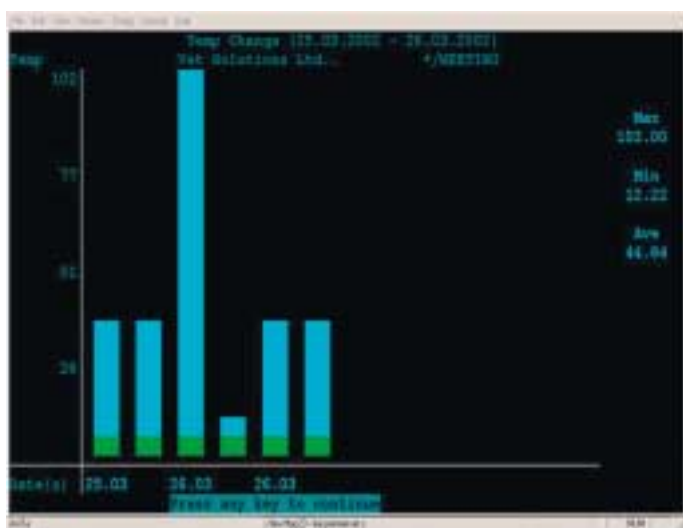
Classic style > Automatic pricing > New item

New style > Fee & stock management > Auto pricing > New item

Enter 'Temperature' in the description field, TC as the keyword and enter your chosen analysis code in the analysis code field. It is unlikely you will be adding a price for recording a temperature so leave the fees/drugs fields blank. In the extras field at the bottom of the AP card enter ^12= This is a macro that will ensure the item is converted from Centigrade to Fahrenheit. (A keyword of TF and ^13= in the extras box will do the opposite! Clever isn't it?)

When a temperature is taken you should be recording its temperature by going to the clinical record, pressing A for Auto and entering TC ?? (Where ?? is the temperature in Centigrade). Or TF ?? (Where ?? is the temperature in Fahrenheit). The clinical history should show a work entry that says: Temp ?? with the analysis code ??? on the right hand side of the screen.

To graph all the temperatures, simply press W from the Clinical record prompt line (it is a 'Hidden' option). Select Other from the options given and the graph will appear. Press C for current to get a bar graph of the last 12 or so temperatures with the dates they were entered. You can apply the same method to any other information that would be useful in a graph; blood glucose readings or dairy herd cell counts for example.



## How do I . . . change menu styles within PremVet5?

You are not limited to one menu system within PremVet5. There are three 'styles' of menu with the same options but laid out slightly differently. One of the main differences is in how you access clients and animals.

With the new style menu the 'New Client' option has disappeared. To add a new animal you must first search the existing records. This avoids users adding duplicate records. The interface for finding records has been made even easier.

To recap:

**Classic:** When searching for an animal you have prompt lines at the bottom of the screen for name, animal, address, id chip etc. By using various 'meta characters' (the / and :) you can add additional search options if you know about them. The matching records are displayed and you select by entering a-s as required.

**New Style:** A box appears with all the fields labelled making it a lot easier for staff to work out what to enter. In addition, the matching records will be in a scroll box allowing you to scroll through the list with the arrow keys, highlight the one you want and press RETURN.

Style	Description
Classic	This style of menu has been on the system for many years, it starts with 'New Client' and has More/Previous options.
New Style	Rather than have all the menu option on one and have to scroll between pages, this has a top-level menu with related options all grouped under it.
Hybrid	The Classic menu but with the new style 'Find A Client'.

### How do I change the menu style?

#### On a per user basis:

From the main menu, select '=' then 'User-Info' from the personal preferences menu select 'Menu' and the style you want. The changes will take effect straight away so you can switch back and forward to see which one you prefer. This changes the menu for the specific user. It will not affect any other users on the system.

#### On a terminal by terminal basis:

General Applications -> Parameters -> Hardware -> Device Settings -> Modify this terminal

Select option 5 and this allows you to switch between New Style and Classic (you cannot set hybrid via this option). You will need to log in/out for this to take effect.

#### System wide:

Use any editor and add the line M\_Style=x to the start up file /etc/default/premvet where x is 0 for classic, 2 for new style and 1 for hybrid. If a system wide setting is in force individual users can still over-ride it by setting a personal preference.



# A dozen reasons to upgrade to RoboVet3

The majority of RoboVet users have now upgraded to RoboVet3. The upgrade process is such that users can gradually turn on the new features rather than worrying about a 'big bang' change overnight. If you have yet to upgrade or are a Vetwise user contemplating your next move, or even if you have upgraded but have yet to discover all the new features, here's a recap of all the benefits.

**\*\*\*Wildcards.** While not new to version 3, many users appear unaware of the value of the wildcard in searches for products or clients. You know a client lives in London Road but you are not sure of the name. What do you enter in the additional information search field? Try \*London\*Road\*. Likewise, you have a huge list of Hills' products. When wanting to sell a Hills product, type Hills\* followed by the first letter of the second part of the product name. You'll save minutes!

**Have you struggled to find invoice numbers?** No more! Invoice number is one of the standard search criteria on the Find Alternative Info search box. Simply enter the number in the field, select Invoice No from the drop down list and RoboVet3 will do the rest.



**Diary view – week at a time.** If you want to view how busy your appointment schedule is for the coming week, why not click the week view button in the diary? Blue space represents unbooked time so you can see at a glance whether you can take a few hours off or attend another CPD lecture!

Alternatively, it means you need to use one of the new scripts to run more recalls to fill the blue space with fee-generating appointments.

**Hospital queue in the diary.** Did you know you can use the diary to create hospital pens? Once you have moved your in-patient to the hospital pen, you can access additional information by double-clicking on the blue cross. Here, you can add notes to the in-patient's record card as an internal management system. Upon receiving a call from the owner, reception staff can click on the blue cross and refer to your instructions with regard to discharging your patient.



**Need an address label in a hurry?** There are many times when you need an address label for just one client. To get one on your default label printer, simply open the client's record card or from the consultation card, click print. The default is address label so click print again and out pops an address label on your printer.

**The Quick Pay Law!** Only use Quick Pay when you are paying off an account in full. If you are taking a part payment for an account we recommend you use the Accounts section instead. This will save you possible problems with allocations at a later date.



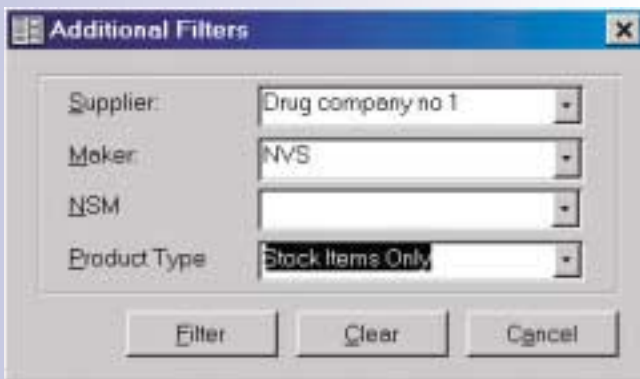
**Hold an invoice.** If you have carried out some work as part of an insurance claim and want to 'hold' the invoice from payment as part of non-insured work for your client, you can flag it as such. To do so, go to the accounts window for your selected client. Highlight the invoice in question, right click and select Hold/Unhold.

**Find the vet!** Do you find your clients call for their repeat prescriptions just when all the vets have disappeared? How about adopting a practice procedure of writing up repeat prescription notes in the identification notes/warning box on the consultation card. To add notes to this field click Details and enter your prescription details in the yellow text box. These notes will appear on every consultation record until edited or removed.

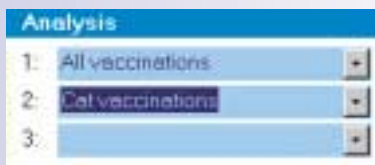
# A dozen reasons to upgrade to RoboVet3

**Current animal consultation list.** This useful script, often used for insurance claims, has been enhanced further. By popular request, you can now include consultations that do not have any financial information associated with them. This means that all consultations will be included in your reports, giving you a complete history for your chosen date range.

**More stock filters.** The new stock view has a vast number of new features which would take up a whole newsletter on its own! But if you want to search out just a certain group of products – perhaps in preparation for the drug rep visit, why not right click and select more filters? Enter the criteria you want to filter on and you will be presented with your filtered stock list. The filter is also useful to check out all the products flagged with a specific NSM.



**Product analysis codes.** Another new feature in RoboVet3 are product analysis codes. You can have as many separate codes as you wish and then apply up to three codes to any one product.



Once set up you can then analyse product sales using these codes. To set up analysis codes select Options from the main toolbar, followed by Type, then Product Analysis. You are supplied with three codes by default. You can change their names and add new filters as required.

To apply a filter select stock, go to the product in question and add analysis codes to the analysis code fields.

**Client Sets and Animal Sets.** Both the client and animal set functions work fully with RoboVet3. They're incredibly useful for taking a snapshot of clients or animals matching a specified search criteria and then mailing them a letter using the Documents section. Perhaps you want to write to all clients in a postcode area to alert them about your 'soon to open' branch surgery. Carry out a search with 'Other info' set as postcode and enter the postcode area of your choice, using wildcards as necessary, in the field. The resulting search will give you your client list. Right click anywhere in the client list and select 'Build Client Set'. This client set will remain as a set for as long as you are logged into RoboVet3. You can now create a letter through the document section. However, remember when setting up your document parameters, choose 'Client Set' (or 'Animal Set') as the record source.



RoboVet3 upgrades are carried out by the ever caring Colin Ingram and come complete with on-site training in these and the many other new features. If you haven't scheduled your upgrade or Vetwise data conversion yet, please call Eddie White on 0131 556 3327.

What's more, we've now created a single click install of RoboVet3 only, making disaster recovery an easier process. This, coupled with a new professional backup package costing £156 per machine allows you to recover from a hard disk replacement in hours. Call us on 0131 556 3327 for more details.