The Vet solutions newsletter • **Spring 2004**

Case Notes

In Focus

what's on + what's in

Vet solutions

Saving you time and money

Pound Saver!

It's been three years since we took on the mantle of Vet solutions. During this time we've set out to deliver top notch support and develop our systems to save you time and money. Whenever we develop new features or introduce new ideas we're always keen to ensure they provide a real opportunity to help you save time, save money or generate new revenue.

Our new EnServ and Voice services deliver opportunities for tangible cost savings for all practices while our most recent releases of both PremVet5 and RoboVet3 include quite a number of valuable time saving tricks:

- EnServ provides fast and cost effective branch communication over the internet, saving money for branches relying on ISDN or leased lines;
- EnServ allows practices to synchronise more frequently and at much lower costs than are likely to be experienced to date;
- EnServ provides a safe and secure method of accessing the internet and distributing email within and outside the practice.
- Voice is a new service providing a low cost telephone service, giving savings of up to 43% over BT's standard tariff;
- Voice gives every user 240 minutes of free calls to Vet solutions' support and administration teams, representing further savings off the typical practice bill;
- Voice provides users with unique software to analyse bills and identify opportunities to cut call costs.
- PremVet5 and DataMajor now fully integrate with Windows applications such as Excel and Word to make practice analysis quick and easy;
- PremVet5 now provides enhanced pop up recalls to alert users to boosters not set rather than those just overdue;
- PremVet5 can now be set to cross update every 5 minutes - well worthwhile where ADSL is available.
- RoboVet3 now provides integration with Sage Line 50 so sales data can be simply and easily transferred to the accounting system;

Co Founders of Vet solutions
John Whytell, Liz O'Brien, Julian Bryan, Tom Melvin and Lee Cairns

- RoboVet3 and PremVet5 now integrates with the Idexx Vettest, saving the need to manually key in results by hand;
- RoboVet3 now comes with new and simpler routines to generate insurance claims and maintain booster reminder letters or labels.

Of course, providing the new features is only part of the story; training and advice on how to use the new features is the other and we're enhancing tried and tested recipes to transfer the knowledge!

To assist practices, Rachel Stevenson is now on the road full time and providing assistance on site to help practices get even more benefit from their system. We plan to mirror Rachel with an additional member of staff in the Southern part of the country shortly.

In addition, we have developed a highly successful 'How Do i ....' guide. Initially for PremVet5 users, this laminated and simple to understand guide provides a new user with an easy route to understanding the system.

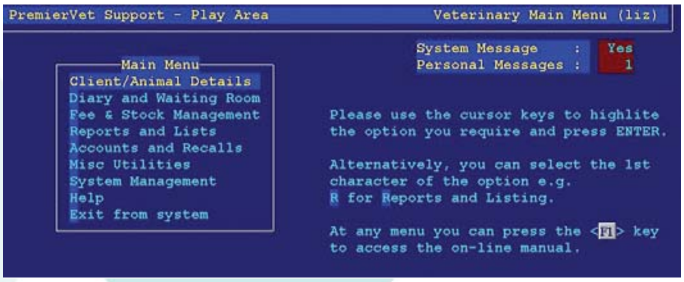
So, if you are looking to get even more value from your practice management system provider, please give us a call and we're bound to find you a saving!

PremVet5 New style menus

Why should I ... ...change to new style menus

Anybody who has had a training day over the last couple of years, or attended a workshop will have heard Vet solutions' staff talking about a 'new' style menu.

And that's really all it is, a new style of menu. Behind it, PremVet5 works in exactly the same way as it did with the 'old' style menu. In fact, it's not really very new any more, as it's been around for a few years now!

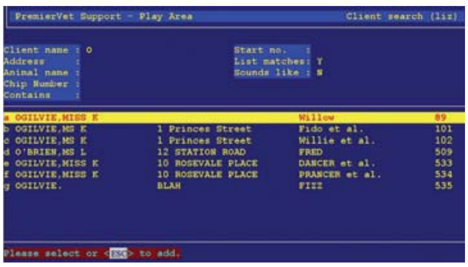


But I like my 'old' style menus - why should I change?

There's not much point in fixing something if it's not broken, but we found a few 'features' within the old style of menu that we felt could be improved upon.

Firstly, how annoying is it to search for a client who has a common surname and/or pet name and find that once you have gone past the first set of matches there was no way to return to the list without quitting and re-searching?

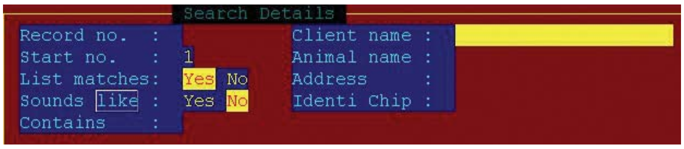
- For example: Let's take Mr and Mrs Smith with Ben; with the 'old' style menu you'd enter the information, bring up the first list of matches, scan it, press return for the next page of matches and realise the one you wanted was actually on the bottom of the previous screen!!
- But you had no choice but to quit, re-search and try not to press return so quickly this time!
- With the 'new' style menu, you can scroll up and down the full list of matches with no problem.



Then there's the situation where you can't remember much about the client details but you know you'll recognise the management card when you see it.

- So, on 'old' style menus, you type in the details you have and, having selected the first choice and looked at the management card, you press N for next from the management card prompt line and PremVet5 would say "Nah, dunno what you're talking about, no clients of that name here".
- OK, what it actually says is "No more Smiths on file" but it's about as helpful!
- With the new style menu, pressing N for Next returns you to your original list and lets you reselect a client. It will keep returning you to the search results list until you quit.

And whilst we're talking about searching for information, how easy is it to find all your brindle boxers living in Beech Avenue using the old style menu "Find a client"?



The answer is "Very simple…if you know what to type in and where to type it"!! Full marks to those that looked it up in the manual and do know how too!

On the new style menu, the search criteria is much more simply laid out, making it much easier for people to follow; especially useful with new staff.

It is possible to change to new style menus a screen at a time, a user at a time or the whole system at once. It's not usually new software, people hate, it's the THOUGHT of changing! A few suggestions:

- Don't just change menu styles and go on holiday for two weeks!
- Explain to the staff what the advantages of the new style menu are.
- Let them have a play with the new style.
- Maybe change them over with the assurance that, if they hate it, they can change back

To find out how to change to new style menus, check out the entry in the How Do i guide ... Set the screen to use the new style menu?

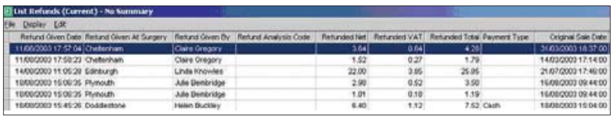
RoboVet3 Customised reports

Are you using the new features of the 'Grid' to produce customised reports?

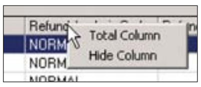
Did you know it allows you to:

- Hide columns using a right click rather than dragging.
- Total any column and all columns if you choose.
- Sub total using one or more columns.
- Change the print setup so you can set your own margins.
- Save Formats you use regularly so that you can load them when required.
- Print with or without grid lines.
- Export directly as an Excel file.

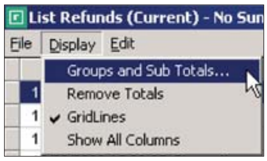
For example, using the new 'List Refunds' report for the month of August produces a grid.



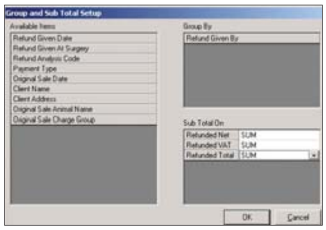
Right click on a column heading and choose to hide or total. Left click on a column title, hold the mouse button down and drag the title into a new position. You will see a grey line appear to show where it will end up when you let go of the mouse.



To sub total, go to 'Display' and select 'Groups and Sub Totals'.



You need to have at least one 'Group' and one 'Sub Total On' for the sub totalling to work. In this example, you wish to report on the value of refunds given by employee. Left click and hold the mouse button down and drag the required field (in this instance 'Refund Given By') over into the 'Group By' area and let go. Drag the three money fields into the 'Sub Total On' area. If you click in the white area with the word 'SUM' a drop down list appears with a list of other available functions. (For example, you could use the 'List Consult Sales' script to find the 'average' sale for each member of staff). When you have chosen your 'Sub Total On' fields click 'OK'.

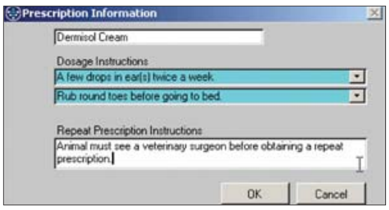


The sub totalled list appears and hides all the columns not selected. To the left of the employee name is a '+', click on this to show the individual refunds for that employee.

RoboVet3 Prescriptions

You will notice a new 'Red' arrow in the sales section of the consultation window.

When you add a product using the red arrow the item is shown with a red/pink background. The product quantity has not been destocked and no sale has been made. No reminders will be created. You can use the 'Unlisted Product' and name the product in the next window. The product can be removed/amended in the normal way. On clicking the Red arrow the 'Product Information' window appears.



If necessary, edit the name of the product. You are required to enter at least one line of 'Dosage' instructions. Unlike normal labels you can write an 'essay' in these boxes! You do not have to enter Repeat Prescription Instructions.

When you have added all your prescription products click on 'Print' and choose 'Prescription' and 'Print' (or 'Review').

The details of the products appear. The Prescribing Vet will be the vet associated with the consultation. If the consultation has not been created by a vet the field will be blank but you can select from all the vets registered at your practice. The 'Name' and 'Qualifications' can be edited as necessary. At this stage you can also edit the dosage and repeat information. If the name is wrong please delete the product and add it again using the correct name. If there are more than three items use the scroll bar to see the other items.

Once the prescription has been printed, a copy of the details will appear in the clinical notes.

Vet solutions Update

Out of hours!
Call 07967 027 927

Saturday morning?

Tuesday evening?

Computer not quite behaving?

Yes - we do provide an out of hours emergency service. As the title suggest, it is for genuine computer emergencies only. Our staff manning the out of hours rota are typically working from home and do not have access to the same 'tools' as during normal office hours.

We will use our best endeavours to help you through your emergency. Repaired or replacement hardware however, will be addressed on the next working day either by ourselves or your own hardware support provider.

Great success at workshops

Over 160 people represented some 95 PremVet5 and RoboVet3 practices at a series of eight workshops in November at venues from Edinburgh to Exeter to Dublin!" says Vet solutions Chief executive Julian Bryan.

Implementation team enlarged

Paul Smith and Neil Porter

Paul Smith has joined us after a number of years with Midshires and now works alongside Neil Porter providing engineering services for new installations and upgrades. Both Paul and Neil are extremely experienced engineers, familiar with Unix, Windows and integrating the two on site! They also understand the problems of installing equipment within the busy day to day life of a practice - essential!

Bob Sneddon

Engineers on the road are managed by Bob Sneddon, who heads up the implementation team.

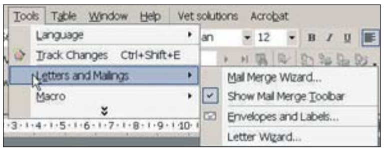
As Implementation Coordinator, Bob ensures all the software and hardware are integrated so practices get the computer solution required. Bob understands the pressures faced by Neil and Paul, having started out life as a field engineer with BT.

Mail merge Saving money

Far too many practices use their label printers for printing booster reminder labels! You can save money by reverting to A4 labels that can be printed through a laser or deskjet printer.

However, just when you thought you had got the hang of using Word for mail merging, Bill and his team decided to introduce a new six step ‘wizard’ for mail merging! This guide helps you use mail merge to labels with PremVet5 and RoboVet3 when using Word 2002 or later.

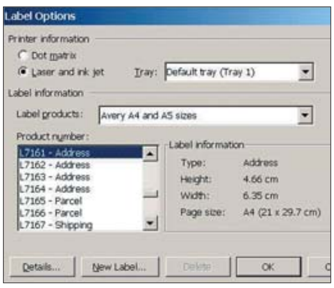
The mail merge wizard is found under Tools > Letters and Mailings from the main toolbar.



Once selected, the right hand portion of the screen will give you the wizard instructions. Always start at step 1 of the wizard, even if Word ‘thinks’ it has part of the information you require and jumps to a later step automatically. You can move forwards or backwards through the wizard steps by clicking Next or Previous at the foot of the wizard instruction pane.

Step 1 - Simply select the type of document you want to produce. In this example we will produce labels by clicking on the Labels button. Then click Next.

In Step 2 you should use the current document and select Label options. Select Avery A4 and A5 sizes and then the reference number for your labels – we recommend and can supply Avery L7161. Your screen will now give you an outline of your label page.



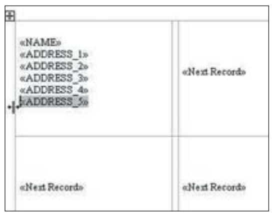
Step 3 allows you to select the source of your labels. If you are creating labels as part of a RoboVet3 document, the record source is automatically selected so jump straight to Step 4.

If you have already created an Excel spreadsheet from PremVet5 DataMajor or exported a file from a RoboVet3 script, click Browse and navigate your way to your Excel file. Select the file. You will be prompted to confirm the file type and sheet within a spreadsheet workbook, table or query within a database. You can refine your list of recipients on the next screen if required. Then proceed to step 4.

Step 4 is tricky! Ignore the right hand pane and identify the Insert Merge Field icon on your mail merge toolbar

Click on this icon and a list of all possible fields will pop up.

Highlight each field you want included on the label and click the insert button. The selected field will appear within the label. You can format the layout of your label as you would format any Word document. You should add paragraph breaks between each line and can change fonts and character size to meet your own requirements. Once you have got your label set up to your satisfaction. Click the Replicate Label button in the right hand pane. Your label layout will be replicated throughout the whole page.



Step 5 allows you to preview your labels. If you want, you can ‘toggle’ between the design and the preview by clicking the ABC button.

The final step allows you to print the merged file – select your chosen printer and remember to put the label sheets into your printer!

Remember, once your merge letter is set up you can use the same word document for subsequent mailings next month – just remember to update your spreadsheet. RoboVet3 automatically updates the record source every time the document is run.

Top Tips Latest short cuts and info

How Do I in PremVet5

PremVet5 Quick Tip 1

Q. The bottom of my screen is showing ... What is it doing?

A. You've managed to activate the bar code scanning and PremVet5 is looking for something to scan.

Q. How do I get out of it?

A. Try pressing Ctrl A or Ctrl V to quit out of scanning mode.

PremVet5 Quick Tip 2

Q. I've made a client appointment in the diary and now they want to come a different time/day?

A. Highlight their entry in the diary, on the prompt line at the bottom of the diary page you will see an option Transfer, select this and the appointment will clear from the screen. Go to the day and time they DO want to come in. Use the arrow keys to highlight the correct time and press the full stop. The appointment should now reappear here.

PremVet5 Quick Tip 3

Q. I have a client who is a breeder; when I add new animals to their Tree it doesn't carry over the discount that I offer, or the type of bill I send, how can I do this?

A. Set New_Animal_Carry_Discount to Yes in params.txt then, when a new animal is added via the tree, the discount, bill type and classification from the LAST animal in the chain will be used. If you have a mixed practice, this allows you to set the earlier records as you want for EQ/FC and then switch discount structure for all future SA records.

PremVet5 Quick Tip 4

Q. What is the Tree 'Set' option ?

A. To make sure all the record cards for one client have the correct names, addresses and postcodes, ensure the master card is correct then go to the Tree screen and press S for set. This will copy the master details onto the related pets' cards. If you have the discount entries in params.txt (see above) then these fields will be updated as well.

You do need access to Permission 112 to be able to edit the discount field.

The default settings, if the above is not used, will be taken from the Parameters -> New Animal -> Discount.

How Do I in RoboVet3

RoboVet3 Quick Tip 1

Q. How can I use the diary to block out bank holidays?

A. You will need security access to the diary setup area. Set up a diary queue with a logical name such as 'Holidays' and make recurring appointments on each bank holiday to block out the whole day. Then add the 'Holidays' queue as an override to the appropriate diary queues.

RoboVet3 Quick Tip 2

Q. How do I allocate a payment to pay off part of a consultation?

A. Using the Accounts area, take the payment as a 'Floating Credit'. Then highlight the consultation or invoice to be part paid and use the 'Manually Allocate' button to manually allocate the amount of part payment to that consultation or invoice.

RoboVet3 Quick Tip 3

Q. How do I show multiple alerts for an animal or client?

A. The new alert organiser allows you to add multiple alerts to any animal, client, or product. For example, to add another alert to an animal, select details from the clinical screen and select the 'Alert Organiser'. Select the new alert required from the left hand part of the screen and click the arrow to move it across to the right hand part of the screen.

RoboVet3 Quick Tip 4

Q. My accountant wants to know the aged debt as at the end of our financial year. Two months have passed since then so how do I get the figure?

A. Use the Historical Balances script within the Financial section of Reports. The aged debt will be calculated by default as at 'today'. Double click on the 'Balance Date' and enter your preferred date. You have a choice of three aged debt listings - 7/14/21, 30/60/90 or none. Double click on 'Aged Debt Options' and click on your preference. Run the script to generate an aged debt list as at your chosen day.

RoboVet3 Quick Tip 5

Q. How can I speed up my typing of regularly used phrases in the clinical notes?

A. You can set up any number of autocorrect phrases within the Options database. Once set up, type your shortcut in the clinical notes and press the spacebar or return and the full text will be inserted.

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