AVImark ReadMe 2011.3.0

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MSS eMinder Service

This feature will allow our AVImark users the ability to automate messaging, such as email, voicemail, and text messages. We are allowing this integration to be a feature of choice, rather than have it be a replacement feature for any current reminder or email communication. With this in mind, the few limitations that will be in place at this time will include, but not limited to, the following:

- Internet access will be a requirement for this feature.
- This feature will not alter the AVImark reminder system currently in place.

Any area of AVImark that currently has the ability to offer email communication, will also have the ability to use the MSS eMinder system (such as Information Search, Reminders, Client Area, etc). This feature will provide the ability to send email, voicemail, and SMS text messages. This tool will be useful in sending marketing information, patient reminders, appointment confirmations, and staff communications.

To begin using this feature, you will need to contact a member of our Sales Team at reminderservice@avimark.net or call 877-838-9273, option 2, option 3. Your account will be created here at MSS and credentials necessary to set up your AVImark MSS eMinder account will be sent to you via Email with instructions on entering them into your AVImark database.

Advanced Options

- Active – Should be set to True
- Appointment Reminders Sent Automatically – to be assigned by user
- Appointment Reminders Sent Days in Advance – to be assigned by user
- Email Messaging Treatment Code – to be assigned by user
- Key – will be provided upon account activation
- Login Email – will be provided upon account activation
- Password – will be provided upon account activation
- Secret – will be provided upon account activation
- SMS Messaging Treatment Code – to be assigned by user
- Templates Web Site – http://eminders.vetlogic.biz
- URL for VetLogic API – will default to proper site
- Voice Messaging Treatment Code – to be assigned by user

AVImark Area Changes and Additions

Treatment List
New Communications Treatments will need added to the Treatment List and their codes added to Advanced Options. Treatments will represent each method of communication used (email, SMS, voicemail). The Q action code can be used to keep communication information off invoices.

Client Area
The Client Area has new fields added to accommodate communication preferences for clients. This new area will contain the ability to select a client preferred communication method as well as selecting those methods of communication for which a client prefers to opt out.
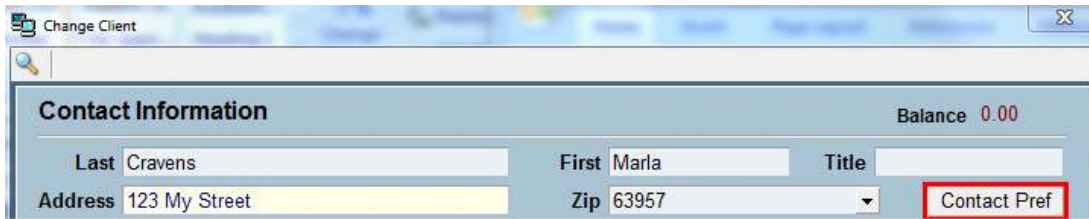
The preferred contact method will be set to "Mail" for all clients that have not yet set or selected a different preference and all methods contained in the window will default to being set to "No Preference". Hovering over the Contact Pref button will display the preferred method for the selected client.
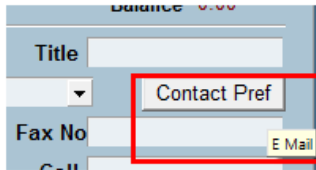

AVImark CID Menu Additions

A new entry has been added to the Services menu of the AVImark CID to access the MSS eMinder Message Center and initiate staff communications.


Selecting eMinder Message Center will open the http://eminders.vetlogic.biz site. This site contains the following:

- Message Center – where users can create message layouts and individual messages as well as manage existing layouts, view the Message Queue, and view the list of sent messages. More details on each of these functions will be provided later in this document.
- Message Staff Member – will allow messages to be sent to specific AVImark users
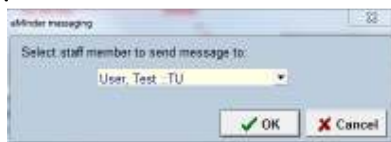
- Staff Group eMinder Messaging – Provides the ability to send messages to all members of a selected AVImark User Group.
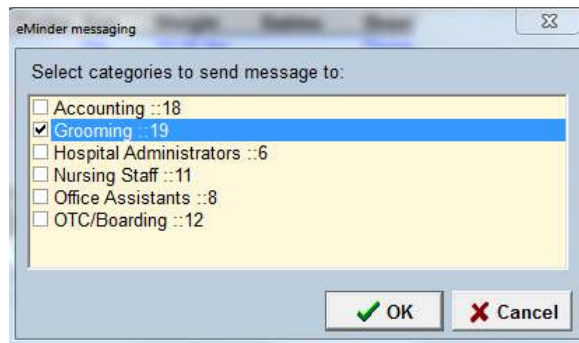
There are multiple areas within AVImark where provisions have been made for staff communications for user convenience. These options can be found in:

- Services > MSS eMinder Services
    - Message Staff Member
    - Staff Group eMinder Messaging
- Work With > Users and Security
    - Right-click option on specific user
    - In the Change User window > eMinder Message button

Important Note: Communications can only be sent to staff members that have valid email and cell phone numbers entered in their User Information window in Users and Security.

Users and Security Changes
Due to the ability to now log directly into the Message Center from within AVImark, we have created a new securable function in Users and Security to restrict access to the Message Center site. When secured, the new function **REM09 Access eMinders Message Center** will prevent unauthorized users from having the Services > eMinder Message Center menu option displayed for selection.

Sending Client Communication
A variety of methods are in place for communication between clinic and client. Sending a message for an individual client can be accomplished from multiple areas.
Directly from the Client Account on the AVImark CID – right-clicking in the Client Area of the CID and select AVImark eMinders will display a pop-out menu containing the following options:

- o   Send Email
- o   Send SMS Message
- o   Send Voice Message

The preferred contact method will be displayed in the right-click AVImark eMinders menu with an asterisk.
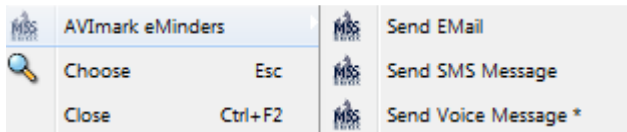
Contact methods that have Opt Out selected will not be available for selection in this right-click menu. In the example below, SMS Messaging has Opt Out selected:

Making the desired selection will open the AVImark eMinders – On Demand Messaging window with the Message Type set for the method selected. If the selected method is the preferred contact method of the client, it will be displayed in red.

Selecting a method that has been set to "No Preference" will show that method in black.

With all Message Type selections, users will have the ability to utilize Templates previously added and saved for the clinic available from the Message Center.

Free-form messaging can be typed and sent directly from this window without being required to use templates.

Merge words are also available for use in the On-Demand Messaging window. For a full list of AVImark Merge Words users can simply use the drop-down in the Merge Word field. The ability to filter the list by AVImark area is also available by using the drop-down list to the right of the Merge Word drop down. Selecting a filter area, then selecting the Merge Word drop down will only display the filtered list. Once the desired Merge Word has been selected, press Insert to enter it into the Message window.
If E-Mail was the type selected, more functional options are available such as bold type, italics, underline, font colors, bullets, and increase/decrease font size.

As the On-Demand message is sent, an entry is placed into Medical History with the treatment code and description as assigned in the Treatment List and Advanced Options. The message content will be stored in the Notes window for that Medical History entry.

Other areas within AVImark that have the ability to send On-Demand messages to clients include:

- Follow-Up List – right-click, select eMinders
- Whiteboard – right-click, select eMinders

Appointment Reminder Messaging Automation
Based on the number of days set in Advanced Options for **Appointment Reminders Sent Automatically** and **Appointment Reminders Sent Days In Advance**, AVImark can upload and automatically send appointment reminders to your customers for upcoming appointments. Setting this option to True, and setting the desired number of days in advance, will allow AVImark to be polled for upcoming

appointments within the number of days specified, then send a reminder (including options to confirm appointment or decline), based on the Contact Preference selected for that client.

When an appointment message is confirmed, the AVImark Appointment will be updated automatically indicating that the appointment was confirmed.

When an appointment is cancelled, the AVImark Appointment will be removed/ghosted from the Appointment Calendar.

Vaccination/Service Reminder Automation

When the MSS eMinder feature is Active, AVImark reminders will automatically be polled and uploaded to the Message Center based on the reminder interval already in use. The clients with a Contact Preference set up will receive a reminder using their preferred communication method. The only setup involved for this benefit is to have a contact preference in place, and have a message layout created and assigned for each method of contact in the Edit Clinic area of the Message Center. There will be more detailed information regarding the Message Center and Layout information in separate section of this document. Those users without a contact preference in place will still get printed reminder cards when reminders are processed in your normal manner.

Vaccination/Service Reminder Manual Upload

We have added a new MSS eMinder for instances where you may want to manually push reminder data up to the Message Center Queue to have reminders sent. The reminder information uploaded in this fashion will use the contact preference set up for the clients receiving the communication. This option can be found in the Work With Reminders window.
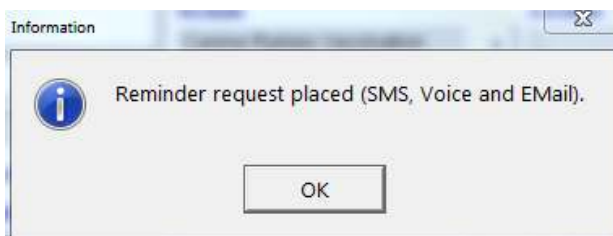
When pressed, the following message will appear:
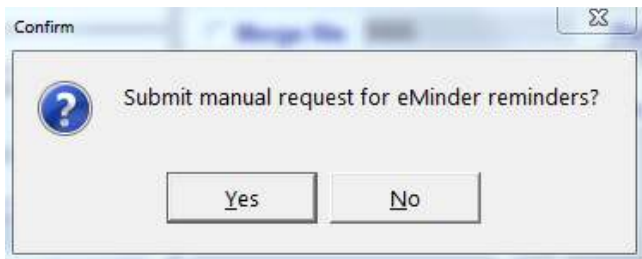
Pressing Yes, will then display the below message and the reminders will be uploaded to the Message Queue where they will be sent out to the appropriate clients:


Messaging from AVImark Information Search

Clients meeting criteria set up in the AVImark Information Search can be exported to the Message Center Queue. Select Results, Export upon completion of the search. Select AVImark eMinders from the list provided in the Merge Format field.
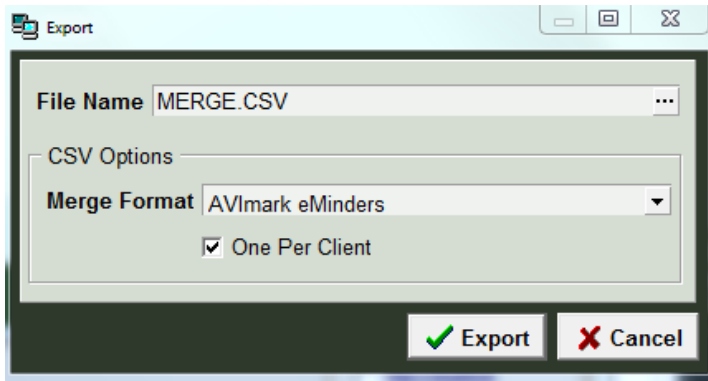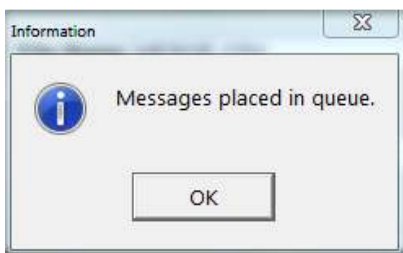
You will then be presented with the following eMinders Export Properties window where you can select a Template, desired Media, and add a Subject:
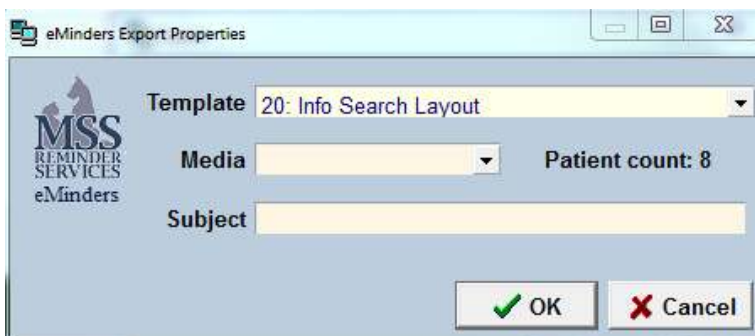
For Media selection, you can choose one of the following:
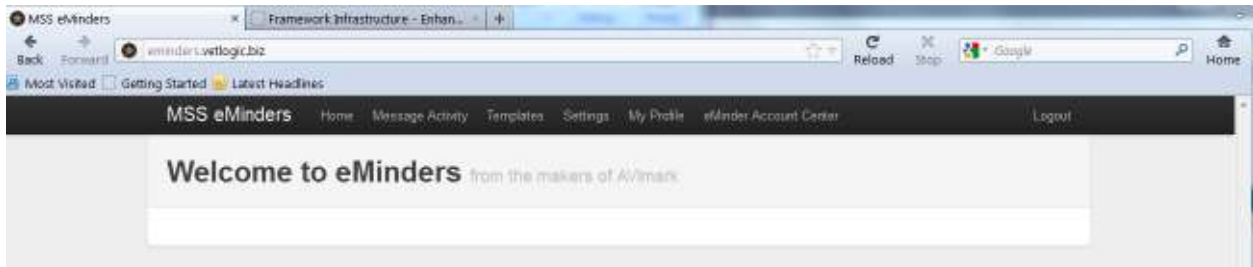
- User Preference
- SMS
- Phone
- Email

Clicking OK will upload the data to the Message Queue and display the below message:

When a client responds to a Voice, SMS, or Email message, the response will be sent to the email address associated to the eMinder account. Voice returns will be a .wav file attached to the email.
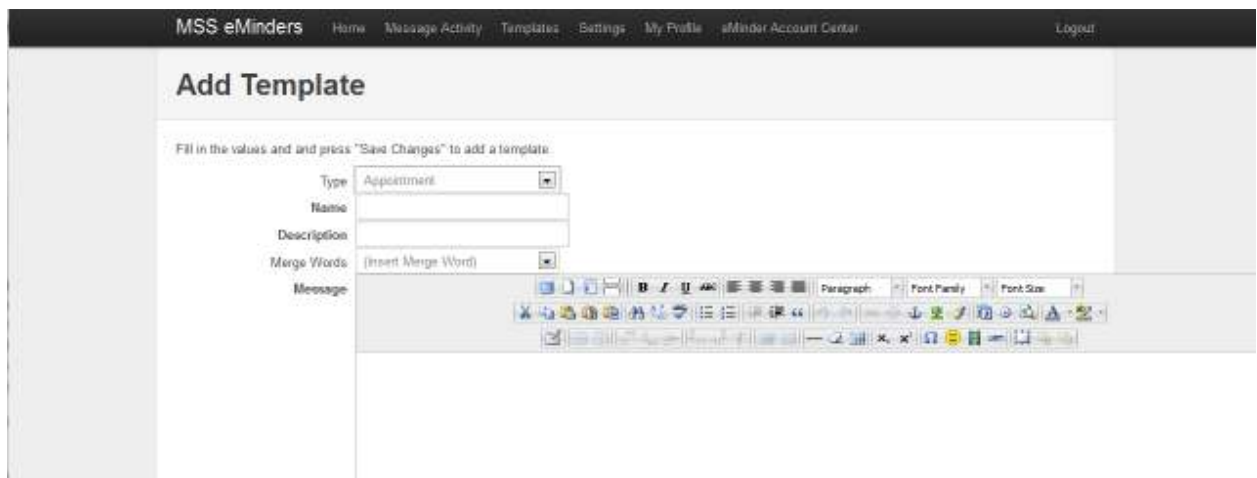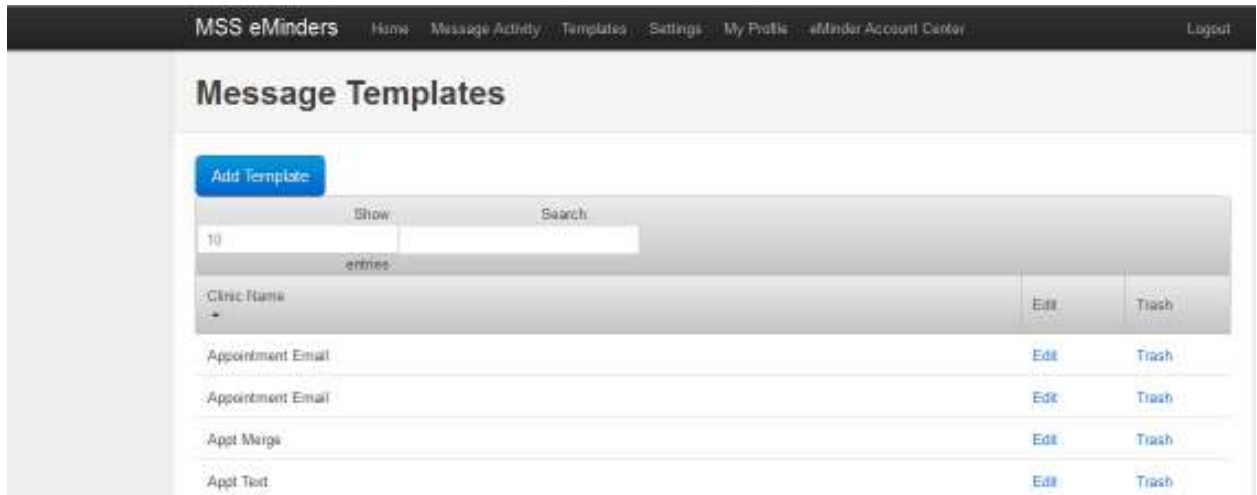
Message Center
The eMinder Message Center is accessible from within AVImark via the Services menu found on the CID. Services > MSS eMinder Services > eMinder Message Center. This link will automatically open the http://eminders.vetlogic.biz site.

From here, you can log in and access the eMinder Message Center.

The bulk of message setup and monitoring tools reside in this site. These include:
Creating Message Templates for use in AVImark - Selecting Templates from the top menu will open the Message Templates window where you can begin creating or editing your message templates. From this window, you can view/edit/or delete any saved layouts.

You can select the Message Type appropriate for the layout you are creating. Create a Name and Description and begin entering the text for your message. As you can see by the example above, there is a great deal of flexibility and functionality when creating message text for communications to be used for EMail. The ability to select font size, color, font type, bold, italics, underlined text, as well as having access to specific merge words is available. Each option available will display a description of the function when hovered over.

When all desired information is entered, the Layout can be saved by selecting the Save Changes button. Create Message will allow you to create and send a "One-Off" message to a recipient directly from this site, without having to go back into AVImark and selecting your client first. Selecting the Contact Type will dictate the available options in the body of the message. Email will contain all the options referenced above, SMS and Phone will only display a brief body area allowing the desired message information. Selecting "Send Message" will send the message to the assigned recipient.

The Message Activity area will display all messages that have been queued and sent for your clients.

Selecting My Profile, Update in the upper right corner of the site will open a menu containing options for changing your account information such as your login name, email address, or password.
Important Note: If you change your password, you must also enter your new password into AVImark in Advanced Options.

Selecting **eMinder Account Center** will open the http://mssreminders.sendza.com/ where further account settings information, Audio Settings and the Audio Repository are available. Reports containing Message Activity can also be displayed.

Selecting **Logout** will log you out of the Message Center.
Selecting the Settings menu option will open a window containing the options below:

Selecting **Edit** for your displayed clinic will open the Clinic Settings page allowing you the ability to customize/modify specific settings.

From this area you can assign the default Message Template for the different areas in AVImark that will automatically generate messages. For example, for your AVImark Appointment Messages, you would want to select the layout representing the message you wish to send your clients to remind them of their upcoming appointment.

VetEnvoy Automatic Account Registration
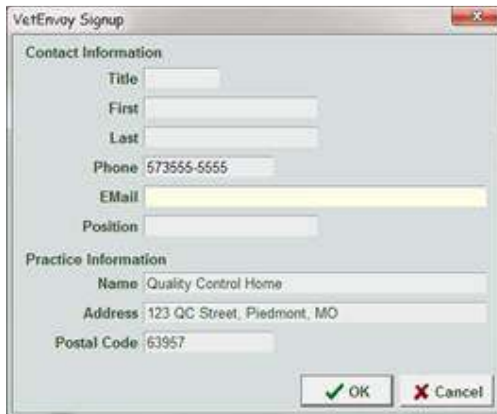
We have automated the process of registering your VetEnvoy Account in AVImark.
For users that are not currently using VetEnvoy, and wish to begin the AVImark setup, you will need to do the following:

- Create a VetEnvoy subfolder within your AVImark folder.
- Launch AVImark, open Advanced Options, and search for VetEnvoy.
- Set your Data Storage Path to the directory you just created. It should look like this: VetEnvoy (no backslash).
- Hold the Ctrl + Shift + Utilities menu and select Setup VetEnvoy.

- The below window will open requiring all fields to be completed before proceeding.

- Press OK when completed and you will see the below window:

- Your VetEnvoy Advanced Option information for your Practice ID and Practice Password will automatically be created and populated for you.
- You are now able to Install and Start your VetXML Service on your AVImark server. To install and run this utility, select Utilities, Service Control, while holding down the CTRL + Shift keys. This will open the Service Control window where you can select Install, then Start to run the

service. To stop and/or uninstall the service, you can use the appropriate Stop and Uninstall buttons.

- For more information on utilizing the VetEnvoy feature, refer to the AVImark 2011.1 ReadMe and/or contact our friendly AVImark Technical Support Staff.

Automatic Updates to Insurance Providers List

We have added the ability to automatically download new VetEnvoy insurance providers and enter that information into the AVImark **Insurance Providers** System Table.

This feature is for use with the VetEnvoy integration. If you are not currently a VetEnvoy user, and would like more information about this feature, please refer to the AVImark ReadMe document for 2011.1 or contact our friendly AVImark Technical Support Staff.

You can update your Insurance Provider List with the following steps:

- Select Services > Insurance > **Check for New Insurance Providers**.
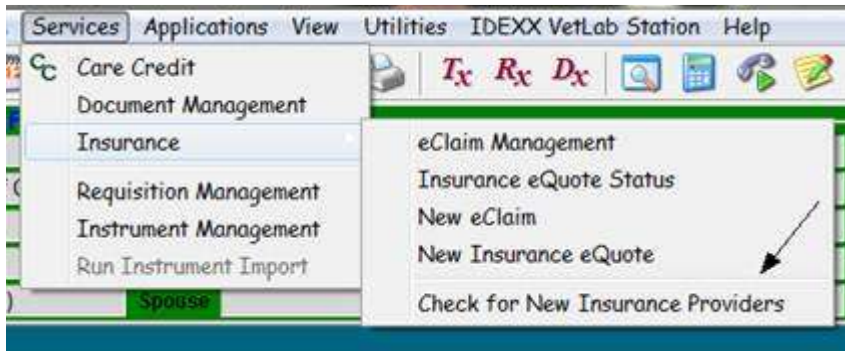
When complete, your Insurance Providers System Table will be populated with the most up-to-date list of providers participating with the VetEnvoy Insurance Provider program.

PetID Collars

Free Form Text Field in Patient Collar Window

A new free-form text field has been added to the Patient Collar ID window to be used for adding a desired phrase or information to print on the patients ID collar.

- From the Patient area on the CID choose right-click **Print Collar**.
- Check the **Details** option to access the new **Notes** text field. This field is limited to 20 characters.
- When using the Notes text field uncheck the "Enlarge Name" option so that it will not overlap into the printed free-form phrase.

Using Perforated Collars with PetDetect

PetDetect has now developed a one-inch collar that is perforated down the middle so it can be separated in half and used on smaller species animals. AVImark has added a new option for the Patient Collar that will allow printing on a perforated collar causing the information to print in a single line format and then duplicated on the perforated collar.

- From the Patient area on the CID choose right-click Print Collar.
- Check the option Use Perforated Collar.
- When using the **Perforated Collar** option, the **Details** option will need to be unchecked.

Doctor DEA Merge Word

The doctor's DEA number can now be merged into an AVImark note field or on a document by using the new merge word **<[History-Doctor-DEA]>.**

ASAP for Idaho

Clinics in Idaho are now required to submit their Controlled Substances in ASAP 4.0 (2007) format. Because of this requirement the state of Idaho has been added to the ASAP report utility.

To begin generating the report for the State of Idaho, you are required to:

- Update to AVImark version 2011.3 or higher
- Have your Hospital DEA number assigned on the Demographics tab in Hospital Setup
- Assign your doctor DEA numbers in Users and Security
- Make sure the AVImark items to be reported have the C Action code (denoting it as Controlled Substance) and the NDC number assigned
- Have the "Include Sequence Number option for printing Drug Labels" set to True in advanced options
  - Printing prescription labels through AVImark will assign numbers and maintain them in sequential order. This number will be a unique Rx number that will be printed on the corresponding Drug Label, as well as being reported for that Controlled Substance line entry on the ASAP report.
- Setup the Days Supply for the controlled substances. You will do this in the "Minimum Interval Between Refills" field, on the Pharmacy tab in the change item window of the controlled substance.
- Have the animal's birthdays and genders entered in the patient area.
- Enter each doctor's license number in users and security.
- Enter a Drivers License number for each client purchasing the controlled substance.

To acquire the properly reported data for your state follow these steps:

- From the AVImark CID select **Utilities**, **Utilities** and type in **ASAP**.
- You will be prompted with a Backup option, if you currently do daily backups you can click No. If you would like AVImark to be backed up, click Yes.
- In the ASAP utility, select the **From** date and **Days to send.**
- For **Export to**, select the location to which you wish to export the file. For example, the C:[ ] option.
- Select your state: **Idaho**
- Select the option **Only report entries with label notes**. If a Controlled Substance entry in Medical History contains drug label notes, only those entries will be reported when using this option.
- Click **Run**.
- When completed, you will find the .dat file at the location you selected. You may then send this file to the proper authorities.

2011.3 Fixes List

Appointment Calendar:
3186 - Appointment Types Not Working
The appointment types were not working in the new appointment window.

880 - New Client Name no Longer Capitalized
When making an appointment for a new client from the appointment calendar and having the client's name in all capital letters, upon check in the clients name was not being capitalized.

3116 - Name Changing When Checking In New Client
If a new client is checked in from the appointment calendar, and their name begins with Mc or Mac, the program was automatically capitalizing the name.

3192 - Error Creating an "on the fly block off" with Alert
Creating an on the fly block off with an alert was causing the following error: "Class TAlertBlockoffDlgDM not found"

EQ Fixes:
3181 - Assertion Failure Adding Info on Equine Tab
When creating a Boarding Reservation for a new Equine pet and trying to add info under the Equine tab; the following error was being generated: "Assertion failure (E:\Andrew-AVImark-git\rtl\mcs\umcsRecordControl.pas, line 324)"

2917 - New Appointment Alert for Equine not Appearing when Creating Appointment from Schedule Tab
When the Advanced Option "New Appointment Alert for Equine" was set to New Appointment or New Patient and a new appointment is created from the schedule tab; the "New Equine Patient Appointment. Remind owner to bring all registration papers and prior medical records with them to their appointment" prompt was not being displayed.

2905 - Preview Printing Chart Shows Incorrect Date
When Preview Printing the Chart, it was showing an old date in the Hoof Chart for Radiograph & Collection Date.

3213 - List Index out of Bounds Clicking Done out of Window that Lists Pets Associated with Client Relation

3211 - Information not Carried Over to Patient Window
When a new patient is checked in, the pet was added, but the information on the Equine tab was not stored. This information will not be stored, therefore the Equine tab has been removed from the New Patient window.

Estimates:
779 - Estimate Treatment Posted to Whiteboard is Using Current Price Rather than New Price
When posting an estimate entry, that has "use current price" unchecked, to the whiteboard Avimark did not obey the "use current price" option and rechecked it causing the entries to post with the current price.

Information Search:
3067 - T-0 Not Working With Client Server
When a search used T-0 for a date range and the clinic was running client server, the original date was always found, instead of the current date.

2011 - Error Emailing from Info Search
When certain words were used in the email text, the following error was displayed when emailing from an information search: "Access violation at address 2000679C in module 'rtl100.bpl'. Read of address FFFFFFFC"

3009 - Does Not Exist In Not Working
In some instances, the "does not exist in" option in the information search was not working.

1555 - Error Attempting to Send Email from Information Search
Sending an email from an information search, with certain merge words, was causing the following error: "Access violation at address 2000679C in module 'rtl100.bpl'. Read of address FFFFFFFC"

IDEXX PACS:
2884 - Remove Shot Requests from IDEXX PACS when Shot Treatment is Declined in AVImark

2871 - IDEXX PACS Unspecified Shot Count Message Option

Inventory List:
1260 - Changing Order of Items on Purchase Order Changes the Amount

2493 - Failure to Prompt for Drug Data Sheets When "A" Action Code is in Use
VPR Drug Data Sheets were not prompting for print, when printing the Drug Label, when using a Treatment with the "A" Action Code and VPR assigned drugs linked.

1936 - Allocated Quantity Incorrect
If an item was added to the inventory used of a treatment in medical history after the treatment was posted to accounting, the Allocated Quantity was being changed incorrectly.

Medical History:
1259 - Restore Normal Prices from Medical History Causes Error
When a prescription fee is charged on an item, and a discount is given, attempting to restore normal prices was causing the following error: "Error. Record, History, record number, 7411, record state, Modified. Destroying modified object."

1240 - Hidden Box Missing in Note Window
The hidden check box will be visible in the medical history note window.

2824 - Opening Radiographs Attachment Generates Errors
Attempting to open the Radiograps attachment gave the following error: "Assertion failure (E:\AVImark-Git\avimark\application\frmBaseBrowse.pas, line 281)"

Miscellaneous:
1311 - Spell Check Files to be Included in Backup
The spell checker files (.adm and .adl) were not being included in the AVImark backup.

1118 - Access Violation Attempting to Print Empty Window
Attempting to print a grid window, that did not contain data, would cause the following error: "Access violation at address 200251D9 in module 'rtl100.bpl'. Read of address 00000004"

2708 - Default Value "Default Order Type" is Not Obeyed
When having the default option –default order type- set to ALLOUT. AVImark was still defaulting to 1st fill in, refills out, when the Rx is entered.

2621 - FNT Printing on Invoice
When FNT was not charged, where FNT would normally print 0.00 was being printed.

3190 - Unable to See Diagnosis at Site Clinic
When logged in as a site clinic, the diagnosis were not visible.

2823 - Error Opening Digital Radiography Table Entry
Opening Work With > DICOM Modalities > Digital Radiography Table > Double Clicking on the one entry, the following message was displayed: "Class TmcsRecordListComponent not found"

Patient Area:
1780 - Patient Chart - Attachments Being Printed Twice
If attachments were included with the patient chart, two copies of the attachment were being printed.

1559 - Patient Chart Not Printing for Tab Selected
Printing the patient chart, using the speed bar button, will now print the highlighted medical history tab, instead of the entire chart.

Reports:
1886 - Report Period for Week has Last Year's Date Instead of 2011
Setting the report period to week was causing the end date to default to the previous year.

1279 - Printing Timcard Report to Excel - Total Column Off
When printing the timecard report to Excel, the Total column heading was off by a column.

1296 - Printing Timecard Report to Excel Adding Extra Columns
When the timecard report, for one day, is printed to Excel, there were extra numbers being reported.

SOAP:
1779 - Note Window Size
When the size of the note window on an abnormality was changed, the text was not expanding to the new window size.

SQL Fixes:
2929 – SQL - Clock In Time Disappeared Until Clocking Out

2877 – SQL - New "Remind As" not Generating Reminder
New "Remind As" was not generating reminders.

3225 – SQL - Recurring Payment Giving Error
Creating a recurring payment was causing the following warning: Error, Invalid column name 'Company'..
INSERT INTO "RecurringPayment" ("_Active", "_LastModified", "AllowCreditBalance", "Amount", "_Client", "Completed", "LastCharge", "NextCharge", "_PaymentAccount", "Payments", "StartDate", "Term", "Company") VALUES (:_Active, :_LastModified, :AllowCreditBalance, :Amount, :_Client, :Completed, :LastCharge, :NextCharge, :_PaymentAccount, :Payments, :StartDate, :Term, :Company)

3201 – SQL - Assertion Failure Printing Follow Up List
Printing the follow up list, with Due Date Range checked and putting in a date was causing the following error: "Assertion failure (E:\AVImark-Git\avimark_sql\usqlConnection.pas, line 548)"

Treatments:
1994 - Error Selecting Treatments
If a treatment was in a category with the word "groups" in the category name, and a treatment was added to the Grouped Entries tab, then the same treatment was added to another group treatment, the following error is displayed: "List index out of bounds (-1)"

1099 - Marking Up a Treatment Category by Cost is Not Marking the Treatment Up
Marking up a treatment category by Cost, was not marking the Treatment up, if the price of the treatment was 0.

Utilities:
3072 - ChangeCode Not Retaining Purchase Order History
The "Retain Purchase Order History" option has been added back to the ChangeCode utility.

2969 - Quantity Incorrect on ASAP Report
The quantity on the ASAP reports will now print the full metric quantity.

1277 - Unable to Select a Doctor in AddHistoryFromCSV Utility
The ability to select a doctor in the AddHistoryFromCSV utility has been restored.

2011.3.6.0 Fixes List

3294 - Patient Area Colors Missing
In client server, the color table was missing and there were no color options in the patient area.

3296 - Unable to Add Treatment to Medical History in Sidekick

619 - Error Searching for History-Recordable Entry-Category-Category
Searching for History-Recordable Entry-Category-Category was causing the following error: "Abstract Error" and nothing was found in the search.

2011.3.7.0 Fixes List

898 - Emailing index rebuild errors gives access violation in c/s
When attempting to email index rebuild errors in client server, the following error was displayed: "Access violation at address 0081B143 in module 'AVImarkServer.exe'. Read of address 00000000."

3339 - Cosmetic Issue in CID
In the new/change client window, "Preferred Doctor" was cut off.

615 - Errors Sending Email
Sending an email, from an information search, that had the same merge word multiple times, was causing the following error: "Access violation at address 2000679C in module 'rtl100.bpl'. Read of address FFFFFFFC"

2011.3.8.0 Fixes List

744 - Error occurs when program auto-logs off with New Treatment window open
If a new treatment window was open, and the user was logged out of AVImark, the following error would
be displayed: "Error. Record, Treatment Extra, record number, -1, record state, New.
Destroying modified object."

3342 - Unable to Open Requisition Management Window After Updating
Some clinics were unable to open the requisition management window, the following error was displayed:
"TRequisitionManagementForm (E:\Chris-AVImark-git\rtl\mcs\umcsSystemUndo.pas, line 590)"
followed by: "Out of memory"

3154 - Need to Report Staff Member Logged In and Assigned Doctor to Requisitions
The staff member and the doctor will now be listed correctly on the LabREXX Requisition.

2011.3.9.0 Fixes List

3252 – SQL - Information Search for Inventory Used Giving Access Violation
When attempting to run an information search to find inventory used, the following errors was displayed in SQL: "Error, Access violation at address 00C148A0 in module 'AVImark.exe'. Read of address 00000001.
SELECT * FROM "OptionValue" WHERE "OptionValue"."_Active" = :OptionValue__Active AND "OptionValue"."_Option" = :OptionValue__Option AND "OptionValue"."AccessType" = :OptionValue_AccessType AND "OptionValue"."_Parent" = :OptionValue__Parent ORDER BY "OptionValue"."_Option" ASC" followed by: "Access violation at address 00C148A0 in module 'AVImark.exe'. Read of address 00000001."

2939 – SQL - Information Search for Items with Report Code Giving Error
Searching for items with report codes was causing the following error in SQL: "The correlation name 'Item' is specified multiple times in a FROM clause."

1471 – SQL - Slowness with WhoGot
The WhoGot report was slower in SQL. This has been corrected.

3275 - SQL - Whogot Lists Treatment Multiple Times
When a treatment with inventory used was posted to accounting; the treatment was being listed on the whogot for each inventory used entry.

3364 - Error Double Clicking to View Other Horses Associated with Client Relation
Double clicking on the Client/Patient Relationship was causing the following errors:
"TPatientRelationshipForm (E:\Chris-AVImark-git\rtl\mcs\umcsSystemUndo.pas, line 590)" followed by: "Ancestor for 'RelationEntryRecordComponent' not found."