AVImark ReadMe 2016.2.5

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Patient Specific Reminder Enhancement

Enhancements were made to patient specific reminders in the AVImark software so they are now able to interact as a member of a reminder series. The work flow of patient specific reminders was modified to now compare the medical history date of existing series members to the modified date of the patient specific reminder and either update, replace, or remove the reminder based on the most recent modified date.

In addition to the modifications of the workflow, there are several other areas of reminders that were enhanced.

Must choose a Valid Code – when entering a code in the patient specific reminder field it now requires a code that exists in either the Treatment, Inventory, Diagnosis, or Problem list. It will no longer allow a code to be entered that does not exist within the program.
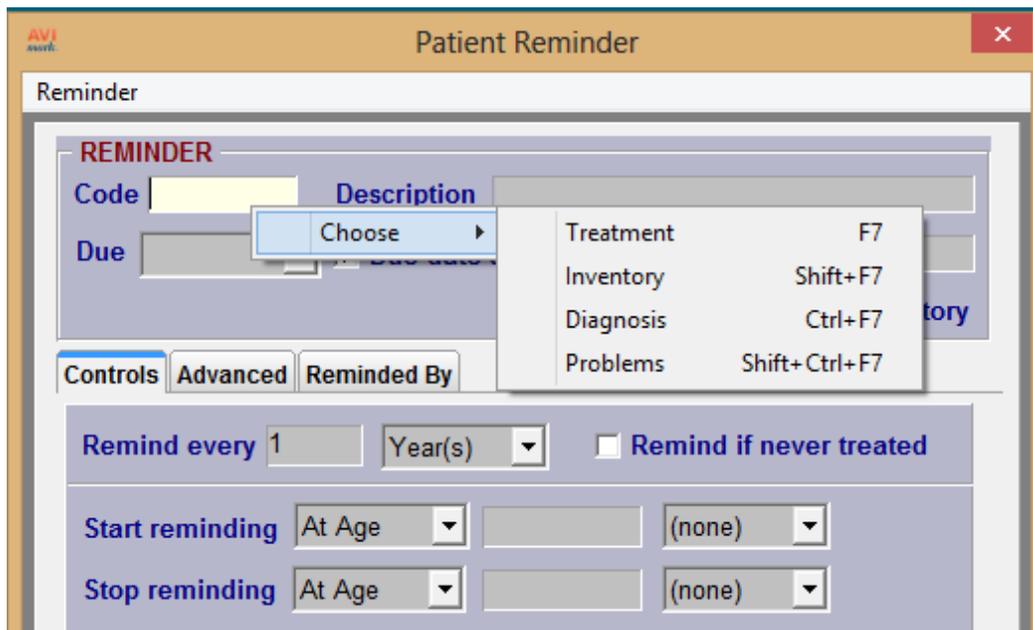
If a code that does not exist in any of the lists above is entered into the code field the user will receive an alert that an invalid code has been entered and to please enter a valid code.
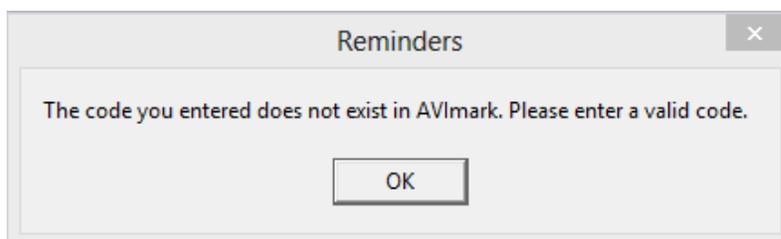
Locked Fields in Patient Specific Reminder Window - When entering a new patient specific reminder some of the fields within the reminder template window will be grayed out depending on if the reminder code selected has a pre-existing template setup on it or not.

Reminder Code with a Template:

If the selected code has a pre-existing reminder template the only fields available to modify are the Due date on the controls tab or Priority, Suspend, and Resume After fields on the advanced tab.

Reminder Code without a Template:

If the selected code does not have a pre-existing reminder template associated to it the user can modify the Due date, Remind every, and Patient to be treated fields on the controls tab or Priority, Suspend, and Resume After fields on the advanced tab.

Note: Once a patient specific reminder has been added to the patient area the only fields the user can edit is the Due date, Priority, Suspend, or Resume After fields.

Requires a Due Date – The Due date field must be entered before you can save a new patient specific reminder.   If the due date is left blank the user will get an alert when clicking done that the date is blank and one must be selected before continuing.
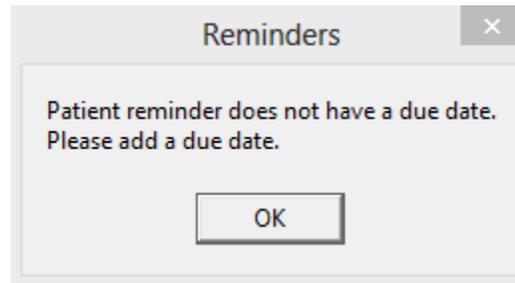
Enhancement to E-mail Directly from Invoice Window

The AVImark invoice window has been enhanced to include an e-mail button that will allow the user to e-mail the customer a copy of their invoice directly from the invoice window.

Post copy to Medical History – within the e-mail window there is also an option to have an entry posted to the patient's medical history for record tracking purposes.

Enhancement to Estimates

An advanced option was added to the Estimate area so the "Allow Override" feature will work the same from all areas of an estimate.

If the advanced option is set to True and "allow override" is checked on a treatment that is included on an estimate, the inventory used window will prompt any time that service is added to an estimate or posted into medical history.

If the advanced option is set to False, the inventory used window will only display when an estimate is posted into medical history.
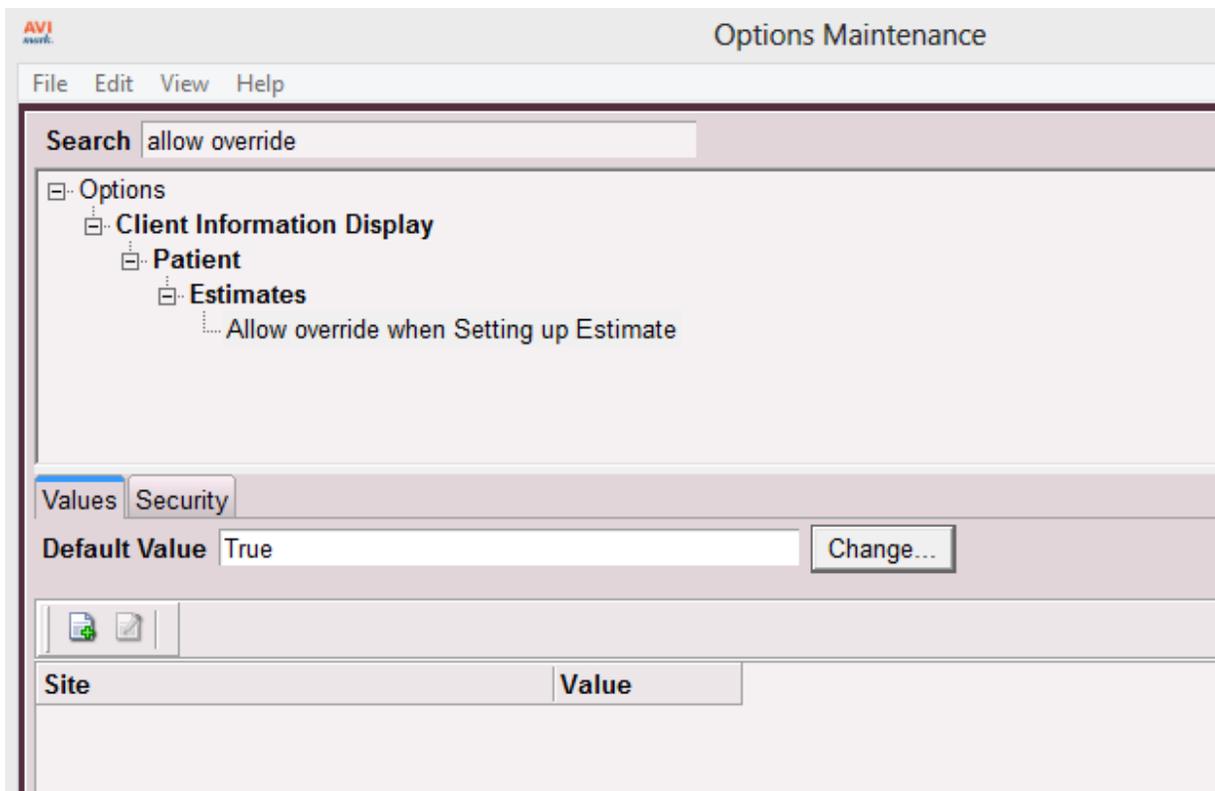
Enhancement to Client Area on CID

The spouse cell phone number is now visible directly from the CID screen.

PULSE DASHBOARD

The AVImark Pulse Dashboard is a centralized command center allowing you and your staff easy access to online subscriptions, technical support, inter-office communications and messages from Henry Schein Veterinary Solutions.

Pulse is in its first phase and will be ever evolving from this point forward. In the future, it will not only offer you quick access to frequently used services, but it will eventually give you a deeper dive into the health of your practice.

Pulse Dashboard Overview
The dashboard is broken into three main sections: Title Bar, Tiles and Inter-Office Chat. These three sections will be referenced in future releases and documentation pertaining to the Pulse Dashboard.

Title Bar

Tiles

Inter-Office Chat
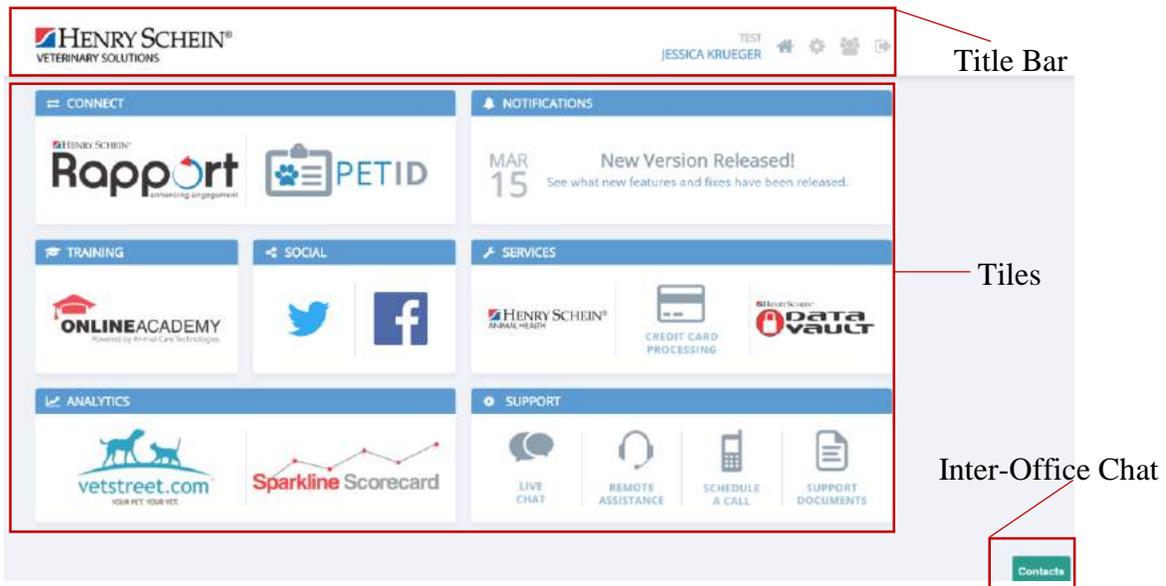
- **Title Bar**

  o Hospital Name and Current User – Indicates the hospital name and current user logged into the dashboard.

  o ⌂ Home – Returns to the main screen of Pulse

  o ⚙ Settings – Edit personal user details

  o 👥 Users – Allows the administrator to add or remove users

  o ⮕ Log Out – Logs current user out of Pulse

- **Tiles & Tile Groups**

  o Connect - Includes tiles that link to services offer client communication tools.

    ▪ Rapport

- PetID

  o <u>Notifications</u> - Displays messages from Henry Schein Veterinary Solutions pertaining to version releases, important announcements, etc.

  o <u>Training</u> – Includes services to train your in-house staff on hospital procedures and software.

  o <u>Social</u> – Direct link to social media pages.

    - Twitter

    - Facebook

  o <u>Services</u> – Integrated ancillary services

    - Henry Schein Animal Health

    - Credit Card Processing

    - Data Vault

  o <u>Analytics</u> – Products and services used to measure practice KPIs

    - Vetstreet

    - Sparkline Scorecard

  o <u>Support</u> – Services available from our technical support team

    - Live Chat

    - Remote Assistance

    - Schedule a Call

    - Support Documents

- **Inter-Office Chat**
  There is an inter-office chat feature built into the main Pulse window allowing users to communicate within the practice through instant messenger.

<u>**Accessing Pulse**</u>
- **Inside the Practice Management Software**
  o When opening AVImark a new "pulse" icon will display on the button bar at the top of the CID screen.
  o Simply click on the button to open the Pulse dashboard.
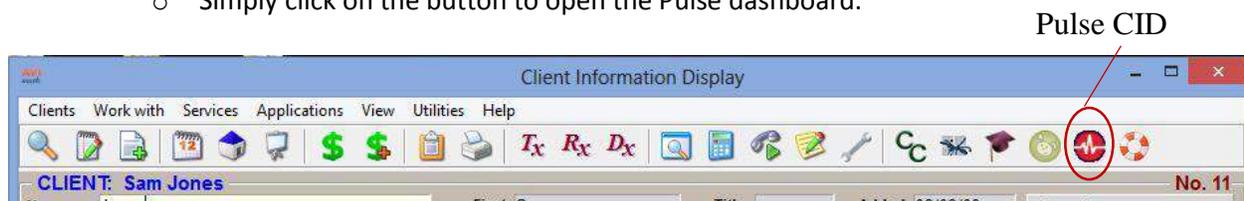
Pulse CID

- **From a Web URL**

  Pulse can be accessed outside of the practice management system with the use of a URL that can be bookmarked on your home computer, mobile device or tablet by accessing: http://AVImark.HSVSPulse.com/.

Logging on to Pulse

Pulse utilizes a type of access called single sign-on (SSO). SSO allows a user to log in with a single ID and password to gain access to a connected services without using different usernames or passwords.

The initial log in to a specified service through Pulse will require you to enter the appropriate username and password for that service. From that point forward Pulse will associate those credentials with your Pulse credentials.

  o Enter personal information as well as username and password.
  o Once complete click sign up.

- From this point forward the user will need to login with their newly assigned credentials.

User Administration

- **Adding Users**

  o Click on the Add Users icon in the upper right corner of the window. ( )
  o This will open an Account Users window displaying all users currently authorized to use Pulse.

  o Enter the users email address within the invite user field and click invite.
  o That user will receive an invitation email asking them to create an account.

- Once a user has successfully set up their account, indicate if the user is an administrator by checking the Admin box giving them more access to the Account portion of Pulse.

- **Removing Users**

  - Click on the Add Users icon in the upper right corner of the window. (👥)
  - This will open an Account Users window displaying all users currently authorized to use Pulse.
  - Click on the delete button to the right of the Admin box to revoke access to Pulse.

Using Inter-Office Chat

The Pulse chat window will allow you to chat with other hospital personnel that has current Pulse credentials. In this first phase, the Pulse window will need to be open in order to send, receive and view messages.

- **Opening Chat**

  - The built-in chat feature can be accessed by clicking on the contacts button (Contacts) in the bottom right corner of the Pulse window.
  - When clicking on the Contacts button the window will expand displaying two tabs:

    - *Contacts Tab*
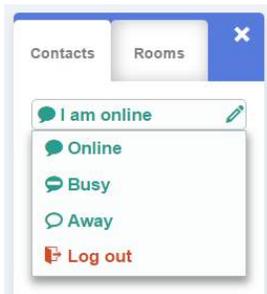
      - The Contacts tab within the chat feature will display all users that have accepted an invitation to the Pulse dashboard.
      - Allows the user currently logged in to select their status of: online, busy, away and log out

    - *Rooms Tab*
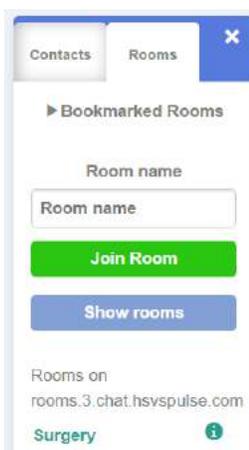
      - The Rooms tab allows users to create and join specified rooms
      - It will display rooms bookmarked (saved) by the current user logged in
      - To create a new room, enter a room name and click Join Room

- *Chat Room Tab*
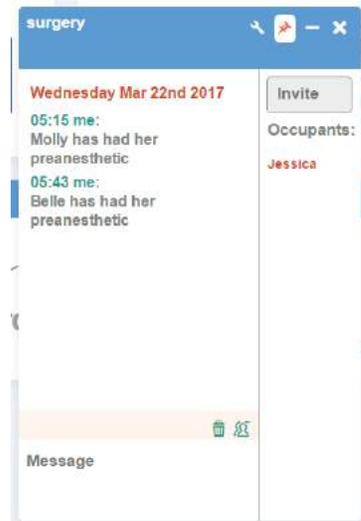
- o When a room has been joined an additional side window will open displaying other occupants within the room.
- o To chat with other occupants click within the message area and type your text.
- o Configure room settings by clicking on the wrench icon:
  - change the name
  - always make the room display
  - define the number of history messages
- o To bookmark this room for future use click on the thumbtack icon.

2016.2.5 Fixes List

8453 - Fix Wellness Plans to Obey "Best Available" Discount With Courtesy Classes
Wellness plans that had a courtesy class were not obeying the "Best Available" discounts.

8320 - Move Doctor Name Down So It Does Not Overlap the Hospital Address
The doctors name would overlap clinics with long addresses.

8362 - Change default "Performed By" view on E-Travel Sheet to doctors only
The E-travel sheet was defaulting to display all AVImark users instead of only doctors.

8661 - Fix Ability to Print Collection Letter for Just One Client
Collection letters with the .docx extension would not print using the "for client" option

8696 - Fix More Stuff Merge Word so Glossary Entries Don't Contain Symbols
Glossary entries using a client address format would print symbols in front of the lines of text

8628 - Change Default Virtual Terminal URL to Include HTTPS
The default URL for the credit card processing virtual terminal was changed to include https.

9006 - Rating Clients Utility
The Rating Clients utility was built into the program so it could be access from the Utilities menu.

8740 - Modify Upgrade Code to Create a Backup Prior to Installing
When downloading an AVImark update a backup will now be performed prior to overwriting any data files.

8739 - Check That Indexes Were Correctly Opened Before Installing an Update
The program will check for index issues prior to downloading the update and require a rebuild if necessary.

8741 - Fix Ability to Display Most Recent Appropriate Pt. Specific Reminder if Multiple in a Series
If a patient had multiple patient specific reminders in the same series some were removed after an apply.

8660 - Prevent Action Codes on Posted or Non-Posted History Entries From Being Modified
Action codes on history entries were refreshing to display what was currently on the service/item from the list instead of what was on the entry at the time it was entered into medical history.

8817 - Use Current Price needs to be checked if adding a group with charge current price checked
Estimates containing groups that used "normal pricing" did not reflect "charge current price" unless the components were modified individually.

8815 - Fix treatment having more than 6 groups or 6 treatments with prompt for associated treatments checked
Treatment groups containing 6 groups or layers of treatments would cause a nesting alert even though the service was not duplicated within the group itself.

8992- Fix Detailed Error Message Option to Remain Checked After Closing/Re-Opening AVImark
Detailed error message option would uncheck when AVImark was closed and reopened

8853 - Detailed Wellness Plan does not print to Excel
The detailed Wellness Plan page would not print when printing to Excel

8374 - Fix Ability to Use F2 to Refill Item and Carry Over Previous Label Notes
Using F2 on an item in history was adding another entry and not carrying over previous label notes

8360 - Fix National Accreditation Number in Users & Security to Accept Zeros
If the National Accreditation Number contained zeros at the beginning of the number, the field would strip them out causing the number to be incorrect.

8816 - Fix Estimate Calculation when "Include Surcharge" is False and Contains Exp Date
The surcharge amount was added to the item price on estimates even when "include surcharge" was set to False.

9317 - Pulse Icon
An icon was added to the menu bar to access the Pulse dashboard.

8733 - Investigate Patient Reminders Displaying (None) Due Date
After a global apply some patient reminders would display a due date of (none).

2016.2.4 Fixes List

8072 – Retain Doctor From Original Antech Requisition When Resending

When resending an Antech requisition it would change the doctor to the person logged into the computer at the time it was resent.

7623 – Investigate Errors Running Income by Play Activity Report in Client Server Mode

Some clinics were getting errors when they would run the Income by Plan Activity report.

8204 – Prevent Tax on Account Summary Report From Rounding if Multiple Entries on Invoice

If an invoice contained multiple pets the tax displayed on the account summary report would round and not match the invoice tax amount.

8195 – Fix Idexx IVLS PDF Files Attaching to Wrong Patient

There were instances where IVLS .pdf's would attach to the wrong patients.

8205 – Investigate and Fix Reminders to Prevent From Deleting During Global Apply

Global applies were causing some patient specific reminders to get removed

8270 – Prevent Global Applies From Adding Patient Specific Reminders

Patient specific reminders were added to patients during a global apply depending on the template setup.

8322 – Fix Refills Going into History at a Zero Price

Random entries would go into medical history at zero price when refilled.

2016.2.3 Fixes List

7866 – Add Ability to Change Description on Patient Specific Reminders Without Templates

The description field can now be edited on patient specific reminders that do not have a default reminder template setup on the code within the treatment list.

7485 – Fix Client Name Overlapping Hospital Address if Doctor Name Isn't Included on Drug Label

If the doctors name was not included on the drug label the clients name would overlap the hospital address on the drug label.

7923 – Fix Negative Quantities Displaying on ASAP Reports

Negative dispensed amounts were appearing on the ASAP reports causing the reports to be rejected.

7426 – Restore and Deprecate Vetcentric Advanced Options

Advanced options for Vetcentric had been removed from advanced options causing rebuild errors so the options were restored and deprecated to prevent the errors.

7934 – Fix Best Available Discounts to Obey Discount Price When Using Cost Plus

Client Discounts using cost plus options would not apply the "best available" discount for the client.

6871 – Fix Drug Labels to Obey Label Font Settings in AVImark

The hospital name and phone number were larger than the rest of the label and did not obey the font sizes in AVImark, which could cause the label to print onto multiple labels.

6863 – Print Item Name and Label Notes on Drug Labels Printed Directly From Inventory List

Labels printed directly from the inventory list did not include the label instructions or the name of the inventory item.

7617 – Prevent Tax on Account Summary Report From Rounding

Tax amounts on the Account Summary report were rounding if a client had two separate invoices during the same period, which caused the amounts to differ from the tax amounts on the Period Totals report.

7698 – Fix Label Choose Window so "Show All" Defaults to Being Unchecked

The "Show All" option was automatically checked when choosing a label, which made it hard to determine which label was currently in use.

8022 – Split Entry History Indexes

The entry history index was split into separate indexes to prevent larger clinics from getting errors if the maximum size limit was reached.

4742 – Deprecate PawPrint Reminders

All PawPrint advanced options were moved to a deprecated status.

7916 – Fix Using F2 to Refill an Item in History From Adding Item at Zero Price

Some clinics experienced items going into medical history with a zero price if they would use F2 to refill an item in medical history

5982 – Fix Washington ASAP Report to Include Clients Name

The ASAP report for Washington did not include the clients name and was being rejected.

8074 – Fix LifeLearn Header Issue

LifeLearn documents printed through AVImark were printing an error at the top of the document where the clinic letterhead should display.

1475 – Update Intelligent Inventory URL Entries in Advanced Options

The default URL's for Intelligent Inventory did not contain the updated Henry Schein URL's.

2016.2.2 Fixes List

7718 – Fix Memory Leak Updating Inventory Sales Statistics

Updating inventory sales statistics would display a memory leak error in large databases.

7703 – Fix Ability to Add Unprocessed Payments Without it Adding a Partial Payment

If an unprocessed payment was added into accounting on a computer that did not process credit cards it would go in as a partial payment.

7720 – Add Right Click "Re-Enter" Option to Replace "Refill" Option on Services in Medical History

The "re-enter" option was added to services in medical history to replace the "refill" option so clinics still have the ability for the service to go back into history and carry over previous label notes.

7789 – Fix Reminder Merge Word Displaying "No Reminders Due"

The <reminders> merge word would display "No reminders due" on documents when the patient actually had current reminders.

7796 – Optimize Period Totals

Changes in the way the Period Totals report calculated new clients caused increased slowness running the report.

2016.2.1 Fixes List

5011 – Include Inventory Used When Linking a Canned Estimate to an Estimate

When a canned estimate containing a service that included inventory used was added to a patient specific estimate, the inventory used was not transferring over.

7495 – Access Violations Printing Treatment Labels

Printing a treatment label either directly from the treatment list or from the entry in medical history would result in an access violation.

7496 - Fix Treatments So Saved Labels Carry Over Into Medical History

Labels attached to a treatment would not carry over into medcial once that treatment was added into medical history.

6988 - Axis-Q Results Should Still Auto-Import After HS Sync Services Are Restarted

If the Axis-Q HS Sync services were restarted the Axis-Q results would not auto-import until the Axis-Q sync service was stopped and restarted on the server as well.

2208 - Scriptel Signature Too Small to View on Documents

When viewing document signatures from an attachment area they appeared very small or non-existent.

2016.2.0 Fixes List

6924 – Word Document Locks When Accessed By Multiple Computers across a Network

If more than one person would try to print a MS Word document at the same time across the network the document would lock and cause errors.

615 – Scriptel Device Not Prompting For Signature if Document is Previewed

The Scriptel device would not prompt for a signature on a MS Word document unless the document was printed and not if it was just previewed.