

Estimate Locking



855-478-7920 | 304 Ohio St. | Oshkosh, WI 54902 Revised July 15, 2019

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Overview

Estimate locking is available in AVImark version 18.22.0 and above. The locking feature has been added to Patient Estimates which allows users to lock an estimate once all edits have been made. Locking the estimate takes away the ability to edit the entries on the estimate. The user is still able to Post or Decline estimate entries, Print, and select a different Doctor.

Locking Estimates

To lock an estimate, go to the Estimates tab for the patient.

- 1. On the estimate, **right-click | Change**.
- 2. In the **Change Patient Estimates**, click **Lock.** Note: the estimate must have an expiration date in order to be locked.

Change Patient Estimates X						
Name Ne	euter Doctor	DNS: David	N. Sharp, D\	/M 👻	j	
Documen	ıt				•••	붬 Print
Active	e Expires In 30 韋 days Expires On: 03	3/21/2019	Created: 0	2-19-19 B	y: David N.	Sharp, DVM
32	☐ Include Tax ☑ Include Surcharges					
Code	Description	Variance	Quantity	Count	Amount	_
920	Antech Pre-op Profile	0%	1	1	52.50)
3715	Glycopyrrolate 0.2 mg/mL	0%	1	1	1.51	1
3006	Butorphanol 10 mg/mL	0%	1	1	14.10)
1009	Catheter Cap-Male Adapter	0%	1	1	3.40)
1055	IV CathTerumo 22 ga x 1"	0%	1	1	4.99	9
710	Catheterization, Intravenous	0%	1	1	13.90) -
Post Lock Estimates Total: \$302.40						
∲ Nex	t 🖓 Prior				🗸 ОК	🗙 Cancel
Modified						/

3. A prompt displays with the option to proceed or not. Click **Yes** to lock the estimate. Click **No** to return to the estimate unlocked.

Confirm	
?	You have asked to lock the estimate, this will cause the estimate to become locked and no other changes can be made to the estimate. Do you wish to proceed?
	<u>Yes</u> <u>No</u>
Show	/ this message again

4. Upon returning to the Change Patient Estimate window the locked button will appear greyed out and the title of the window will contain (LOCKED).

AVI Change Patient Estimates (LOCKED)				
Name	Neuter			



Options Maintenance

There is an advanced option which allows users to set the default value for all users or set users under ID/User/Value if a user needs to be set differently from the default value.

1. Click and search for **estimates**.

Eile Edit	ns Maintenance View Help								_		×
Search	estimates										
⊡- Optic	Ins lient Information Disp Patient - Estimates - Allow override v - Default Numbe - Include Surcha - Include Treatm - Name - You have aske B Posting	vhen Setting up Estimate r of Days Until Estimate Expires rge in Estimates ent Comments d to lock the estimate, this will cau	use the estimate to	become lo	cked and no	other change	es can be made t	o the estimate [Do you wish t	b proceed	2
Values	Security										
Default	Value Prompt		Change								
	1										
ID U	ser	Value									
	<no data="" disp<="" td="" to=""><td>lay></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></no>	lay>									
										 Image: A start of the start of	Done

- 2. With the locked option highlighted, click **Change** and make the preferred selection for the Default Value:
 - o **Prompt** The prompt above will open each time Lock is clicked.
 - o Yes The estimate will automatically lock when Lock is clicked.
 - o **No** The estimate will NOT lock when Lock is clicked.

Estimate Tab

Once the estimate is locked, on the Patient Estimate tab, the estimate will display **(L)** at the end of the estimate name.

PATIEN	T: Scotty					No. 1428
Name	Scotty	Codes	Sex M	Added 08-02-18	DNS Neuter (L)	02-19-19
Birthday	08-02-16 Age 2y	Rabies		Reminded (none)		
Breed	Terrier, Scottish	Plan		Deceased (none)		
Color	Brown and Tan	Weight 36.00	in Ibs	Microchip		
Species	Canine	Allergy (none)		Relation (none)	Reminders (Follow-ups) Estimates	Ownership / Sched 🕬



Locked Estimate Options

Once an estimate is locked, the users cannot add, remove, or edit any entries on the estimate. The user will, however, have the ability to Decline, Post, Select and Post, add Notes, and Print the estimate.

- 1. Right-click | Change on the locked estimate.
- 2. Use the Ctrl or Shift key to highlight items to select.
- 3. Right-click | Select or press the spacebar to select items from the estimate.

AVI Cha	Change Patient Estimates (LOCKED) ×									
Name	Neuter			-	Doctor	NS: David	I N. Sharp, D	VM 👻		
Docun	nent								•••	🖺 Print
🔽 Ac	ctive Expires	In 30 🚊 da	ys l	Expires	On: 3/21	/2019	Created: ()2-19-19 By	y: David N. S	Sharp, DVM
		ie lax <mark>IM Inclu</mark>	ide S	Surchar	jes					
Code	Description				V	ariance/	Quantity	Count	Amount	
920	Antech Pre-	op Profile		Edit		• 09	5	1 1	52.50	
3715	Glycopyrrola	te 0.2 mg/mL		View		0%	6	1 1	1.51	
3006	Butorphanol	10 mg/mL	_	view		0%	5	1 1	14.10	
1009	Catheter Cap	p-Male Adapter	현	Choose		• 09	5	1 1	3.40	
1055	IV CathTeru	umo 22 ga x 1"		Notes	F5	0%	6	1 1	4.99	
710	Catheterizati	ion, Intravenous		Print		0%	6	1 1	13.90	-
3 rows	selected			Formula	iry					
Selec	cted			Inventor	y Used					
Code		Description		Decline	Shift+F8			Quantity		
920		Antech Pre-op		Post	F8			1	1	
3006		Butorphanol 10		Select	Space			1	1	
1055		IV CathTerum	o 22	ga x 1"				1	1	
									-1	
	71.59									
1	Estimates Total: \$302.40									
<u> </u>		J GK								
д		rior	_						A OK	% Cancel
V 1	TTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTTT									~ cancer



Expired Estimates

The only way to unlock an estimate is for it to Expire. An estimate expires once the Expires On date has past. The estimate will unlock and is then editable. If any prices were increased within the Treatment or Inventory List, they will be reflected on the estimate once refreshed.

Expired estimates will also show in Red so at a glance the user knows the estimate is expired.

PATIEN	T: Jersey (20661) ———		No. 20628
Name	Jersey	Codes Sex N	DO Canine Dental Grade 1 & 2 2/18/2019
Birthday	2/19/2014 Age 5y	Rabies	
Breed	Wheaten Terrier	Plan	
Color	Tan	Weight 0.00 in Kgs	
Species	Canine	Allergy (none)	Reminders (Follow une) Estimate Ownershin / Schedule /
			(reminders / ronow-ups / coundie / Ownership / schedule /

LockEstimate Utility

There is a utility to lock all valid estimates, meaning they have not expired. The utility will lock all estimates that have not expired as of the date you are running it looking forward. Again, once an estimate is locked there is no unlocking it. Run a backup before running this utility.

- 1. Before running the LockEstimate Utility, create a backup. Before backing up your AVImark files, be sure **all workstations have closed AVImark**.
- 2. With your mouse over the AVImark Guardian icon on the Desktop, **right-click** and from the shortcut menu, choose **Run as administrator**.



3. In AVImark Server Guardian, with the option **Open AVImark Server** selected, click **Run**.





The AVImark Server opens.

AVI AVImark Server	_	×
<u>F</u> ile <u>U</u> tilities <u>H</u> elp		
Active: True		
Path: C:VAVImark Demo		
Port: 9191		
Connections: 0		
Computer Name:		

4. From AVImark Server, click on Utilities | BACK UP AVImark Files.







5. Click **Yes** to proceed with the backup.

AVI Backup	— 🗆 X
Select the destination Destination: D:\ Backup AVImark Data Backup	In directory. Include: ✓ Program files ○ Documents ○ Photos ○ Attachments ○ Journals ○ Lab Files Options: ✓ Verify backup
Path: D:\Backup\AVImark Data Backup	Drive:
🖌 Backup	X Cancel ? Help

- 6. Under Backup Options, select the option **Program files** and **Verify backup** then click **Backup**.
- 7. Once the backup is finished, a **Backup verified successfully** message will appear. Click **OK** on the message.

Backup	— 🗆 X
100%	
Destination:	
🗁 D:\	Include:
🗁 Backup	Program files
AVImark Data Backup	
AVImark Server	× Photos
Backup verified successfully	y. ☐ Attachments ☐ Journals
ОК	Lab Files
	Verify backup
Testing D:\Backup\AVImark D	ata Backup\Wed.zip
c:\avimark demo\vetenvoy\Micro	c 🖃 d: [data] 💽
Sackup	X Cancel ? Help

- 8. Close AVImark Server Guardian and return to AVImark.
- 9. From the menu bar, click on Utilities | Utilities.
- 10. In the Utility dialog box, enter LockEstimate then click OK.



Utility	×
Name	
Lockestimate	
ОК	Cancel

- 11. A message will appear to run a backup. If you followed the previous steps to create a backup, click No on the message.
- 12. Click **Run** on the LockEstimate Utility. **Remember, once an estimate is locked there is no** unlocking it.

AVI AVImark Utility	—		Х
Press "Run" to lock all active Patient Estimates set to expire after 02-19-19		Run	

