Adding Treatments

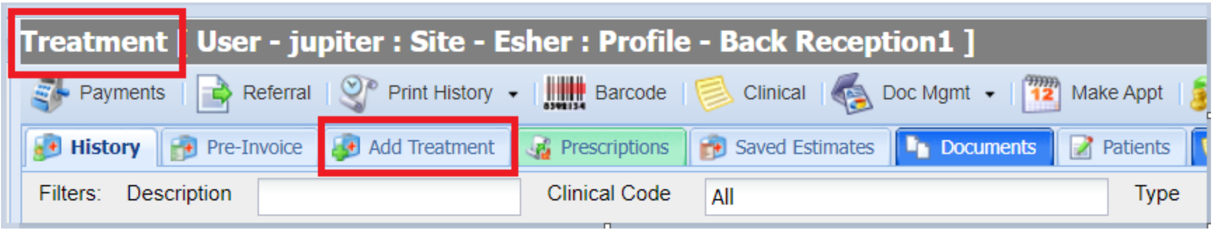
01/07/2025 10:40 am BST

Summary

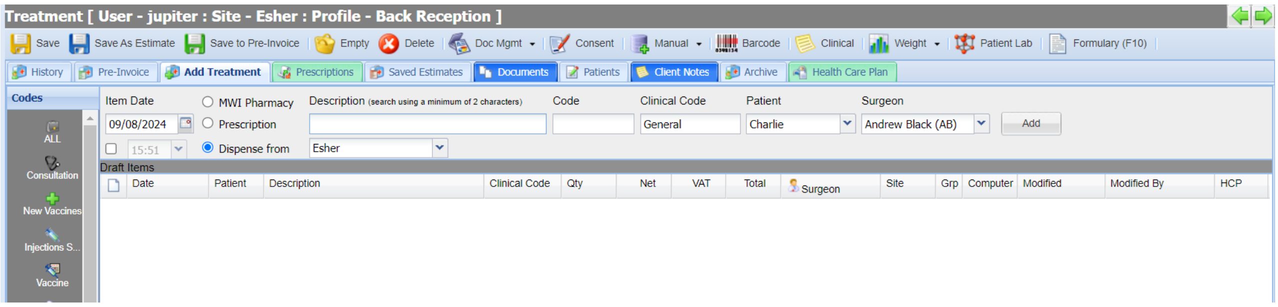
The 'Add Treatment' tab of the Treatment Screen is used to add clinical and non-clinical work to a patient's Treatment History. This screen is used for billing, storage of clinical history, production of estimates, addition of treatment images and other documentation.

Adding Treatment to Draft

1. Enter the Treatment Screen.



2. Select the 'Add Treatment' tab.
3. Once selected the below screen will display.



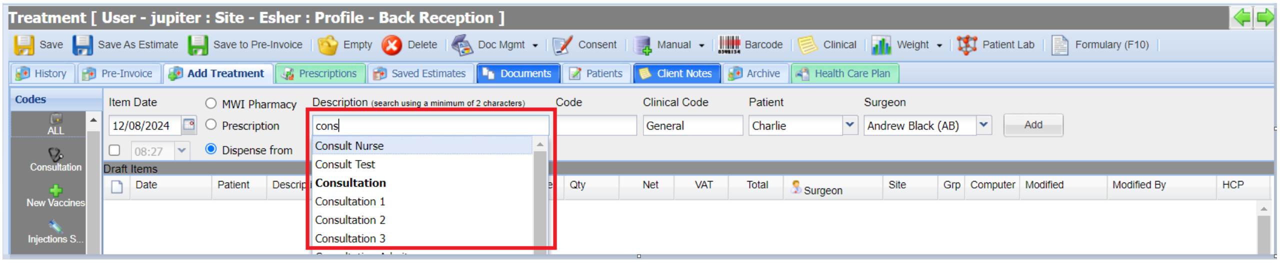
4. The next step is to add treatment to draft (Similar to adding items to checkout when online shopping).

There are multiple ways of adding treatment:

Description Search

When you first access the 'Add Treatment' area, the cursor is already positioned in the Description Search box.

To search on product or service description, type the item/service you require (first few letters will display recommendations from your code entry).

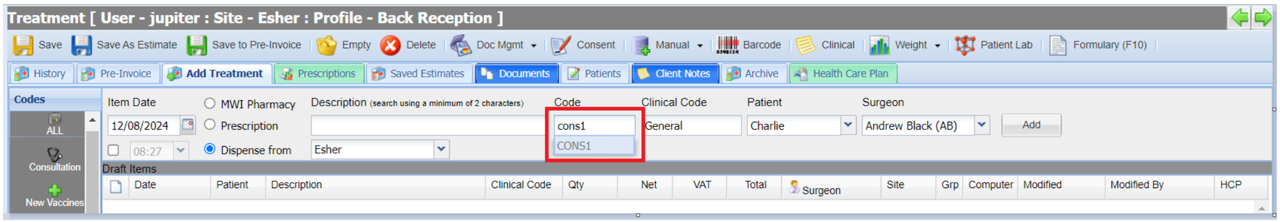


Once you can see the item you require, you may either click on it with the mouse or use the down arrow key on the keyboard to highlight it. Once highlighted, either select the 'Add' button (or press Enter) to proceed to the next step.

Note: *To wildcard search, use % symbols. i.e. to search for a code that doesn't start with, but contains the word 'Consultation', you can search %consultation% to locate these codes.*

Code Search

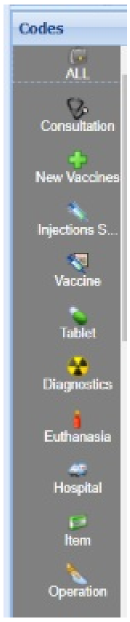
Similar to the above, you can search by Code rather than description.Codes can be assigned to items to speed up the dispensing process (ie type "Cons1" instead of "First Consultation").



Press enter or use the mouse to confirm the desired code and proceed as described above.

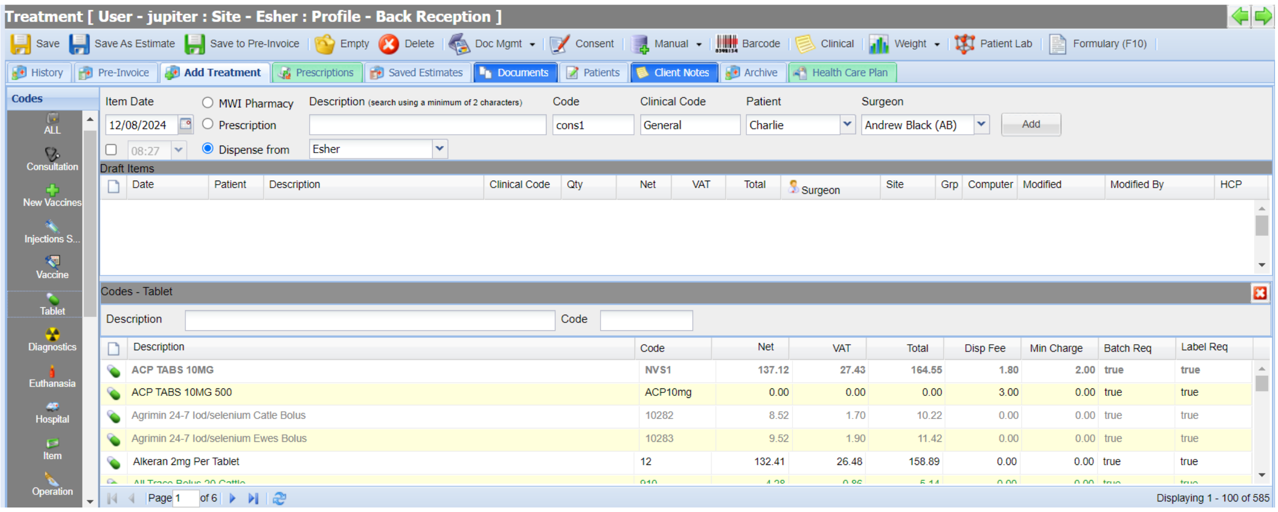
Code Selector

Within the Add Treatment screen is a set of icons in the left-hand column relating to the various available Treatment Types, for example Consultations, Tablets, Vaccinations, Visits, etc.



The idea of the Code Selector is that the treatments are grouped into manageable areas, making it easier to search for the item you require if you are not exactly sure of the description.

Select the required Treatment Type and the Add Treatments screen will be split horizontally, the lower half showing the code selector.



Codes can be searched by description and code.

Note: To wildcard search, use the % symbol, i.e. to search for a code that doesn't start with, but contains the word 'Consultation', you can search %consultation to locate these codes.

To select a product/procedure, double-click on it or select it.

Barcodes

Items can be scanned into the system by selecting the 'Barcode' button. For more information, see: Barcode Scanning.

1. At this stage the following can be specified using the fields provided:
2. Specify a Clinical Code for the treatment.
3. Once a Treatment has been added, the items 'Treatment Options' (configured in Code Entry) are displayed.

   Note: Treatments cannot be backdated before the Accounting Period.

   Clinical Code = The Clinical code (ie if related to Dental you can set the clinical code to 'Dental').

   Patient = The Client's animal.

   Surgeon = Practitioner who is adding the treatment.

   Stock Centre = The stock location you are destocking from.

4. Once you have processed through the 'Treatment' Options, the items will add into draft and the draft balance will display in the bottom right-hand corner.
5. Repeat the above steps for all required items/services.

Additional Add Treatment Functionality

The following functionality can be used when adding items to draft.

Clinical = Add Clinical Notes to draft. Doc Mgmt = Attach a file/image to the patient's treatment draft.

Empty = Empties the treatment draft.

Delete = Deletes selected items from draft.

Manual = Add treatment with or without pricing for codes that do not exist.

Weight = Record a Patient's weight and view their weight chart.

Consent = Generate a Consent Form.

Saving Treatment

Once all of your items have been added to draft, select one of the three options depending on your requirement:

Save = Saves the current draft to Treatment History.

Save as Estimate = Saves the current draft to the Estimates tab.

Save as Pre-Invoice = Saves the current draft to Pre-Invoice tab.