Treatment History

16/09/2025 8:59 am BST

Summary

The History tab of the Treatment screen shows all the clinical information relating to the selected patient.

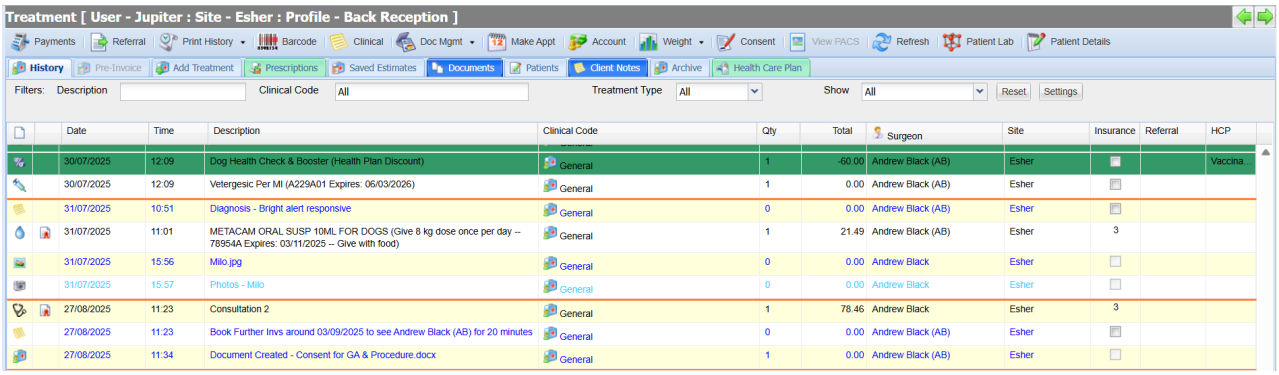
Details

View a patient's Treatment History

The Treatment screen can be accessed in multiple ways:

- Double click an appointment from the Diary/Daylist.
- Double click a patient from Reception.
- Select the 'Treatment' button from Reception.
- Right click on a Diary appointment - View History

When the Treatment screen is loaded, the History tab is the first to be displayed. The most recent history is seen at the foot of the screen; the previous notes can be seen by scrolling upwards.

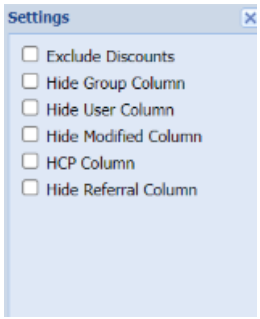


Show/Hide Information

To modify the view of the treatment history screen, select the 'Settings' button. This will allow you to hide the following:

- Exclude Discounts
- Group Column
- User Columns
- Modified Columns

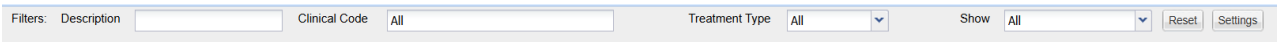
- HCP Columns
- Referral Columns



This view is configured per user and is remembered by User Profile.

Filters

The following filters can be used to search and/or sort a patient's Treatment History.



Description = Search by description of item/clinical note/document.

Clinical Code = Search by clinical code.

Treatment Type = Filter by treatment type.

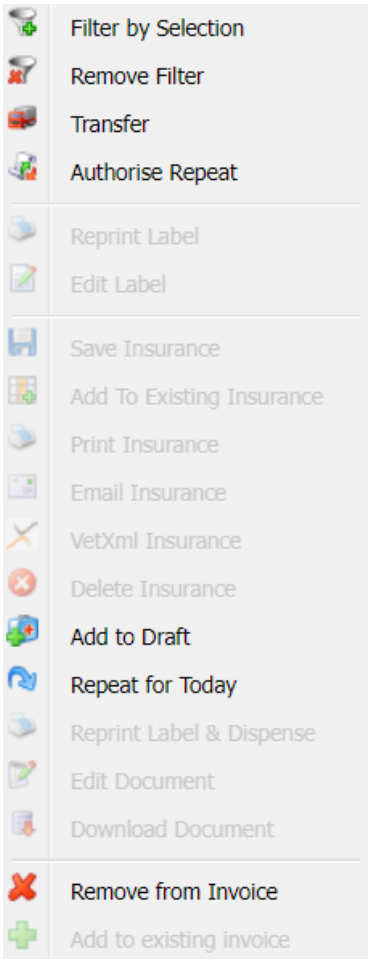
Show = Additional filter to only show certain activities such as treatment items, clinical notes, prescription items.

Reset = Select this button to reset any filters.

Right-Click Options

Right-clicking on an item in Treatment History presents you with various options.

All applicable options for the item selected will display in bold. All non-applicable items will display in grey and you are unable to select them.



The options function as follows:

Option	Description / Function
Filter by Selection	An additional filtering option is to right-click on any part of the treatment history and filter by the description. For example: To filter the history for all work by a description, find one instance of this description, right-click on it and choose 'Filter by Selection'
Remove Filter	'Filter By Selection' can be undone by right-clicking and choosing this 'Remove Filter' option.
Transfer	Occasionally, you may inadvertently enter work onto the incorrect patient record. To transfer history from one patient to another, select the items you wish to transfer, select Transfer and specify the client/patient you wish to transfer history to using the wizard provided.
Authorise Repeat	The purpose of this feature is purely to make the items stand out in the clinical notes for easy recognition. The item will be highlighted against a green background.

Reprint Label	To re-print a dispensing label for an item which has previously had a label, right-click on the item and choose 'Reprint Label'.
Edit Label	If a label was printed for this item, then right click on the items line and select edit Label. To change the quantity re-enter the dispensing instructions, eg '5 tablets twice daily for 14 days' this will enter 140 into the Quantity. Print the label or save without labels as required to save.
Save Insurance	Saves insurance claim.
Add to Existing Insurance	Adds to existing insurance claim.
Print Insurance	Prints Insurance Claim associated to item selected.
Email Insurance	Emails Insurance Claim associated to item selected.
VetXML Insurance	Sends Insurance Claim associated to item selected to VetXML .
Delete Insurance	Removes the selected item from the insurance claim.
Add to Draft	Adds the item to draft for today's date.
Repeat for Today	Adds the item to the Add treatment screen for today's date.
Reprint Label & Dispense	Reprints the label for the selected item and adds item to the Add treatment screen for today's date.
Edit Document	Edit the document selected.
Download Document	Downloads the selected document
Remove from Invoice	Item removed from the invoice As long as it's still within the closed accounting period
Add to existing Invoice	Add an unpaid item from history to drafts