Follow Up Module: Medical

New screen found on the Edit Menu

Released to your PetPoint database the week of November 14th

Learn more here:
www.petpoint.com/help/release_resources.htm
The purpose of the new Follow Up Module is to provide mass update functionality to those Items within Medical that have Statuses: Exam/Surgery, Tests, Vaccinations, and Treatments.

- Shelters will be able to select multiple Pending/Scheduled Exam/Surgery, Test, Vaccination & Treatment records at once and:
  - Change their Status from Pending/Scheduled to Completed or Cancelled.
  - Change their Status Date/Time to some other future date/time.
  - Update specific fields within the Item Details if you are doing a mass update on multiple records of the same Item Type.
The Follow Up Module will be accessible via the existing Edit Menu either through the home page link or through the drop down menu.
When utilizing the Follow Up Module, there are tabs embedded within higher tabs. As an example, the Medical Module Follow Up Tab has the following Sub-tabs: Exam/Surgery, Tests, Vaccinations, and Treatments.
The two sections of the screen in brown are the two filters, which act separately.

- The first filter is for animal records which have Scheduled or Pending items attached to them.
- The second filter differs depending on which tab you are on and allows you to limit the specific type of record to be worked on with the mass update.
The Follow Up Search Filter Control has many search options:

- Pending Status Checkbox: checked by default, which includes all records in the status of Pending.
- Scheduled Status Checkbox: checked by default, which includes all records in the status of Scheduled.
- From & To required date/time, populates with the current date.
- Include Past Due Records Checkbox: When checked, all items where the Scheduled Date/Time is prior to the From are INCLUDED in the Follow Up Grids on all Tabs/Sub-Tabs.
- Animal #: search for all Scheduled & Pending items narrowed down to only one Animal #
- Group #: search for all Scheduled & Pending items narrowed down to only those animals within a specific Group #
- Site: drop-down of all Sites. Defaults to “Default Site for User” from Add/Edit Users if populated.
- Location: drop-down of all Locations plus “--All--” and all Sub-locations plus “--All--”. Both default to “--All--”.
- Stage: drop-down of all Stages plus “--All--”. Default is “--All--”.
- Animal Status: custom drop-down of Animal Statuses: “--All--”, choices here are Active Only & Inactive Only.
- Animal Type: drop-down of all Animal Types (including system-defined Dog & Cat) plus “--All--”. Default is “--All--”.
- Find Button: performs the search for the records and displays them in the following Grids on each Tab as user navigates to them.
- Reset Button: resets the Filters back to their defaults.
Follow Up Exams & Surgeries

Here you will perform mass updates of your Scheduled and Pending Exams or Surgeries:

✓ Pre-schedule Surgeries and mark them completed in one easy step.
✓ Set up pending intake exams during intake and use this screen to record that they have been done.
✓ Reschedule or Cancel any Surgeries or Exams in large groups to help manage your scheduled medical records.
- The Exam/Surgery Sub-Tab allows users to perform mass updates to Scheduled or Pending Exam or Surgery Records.
- Use the filter at the top of the tab to narrow the results down by medical record type or exam or surgery type, if applicable.
- Click apply to see the updated results.
- Use the Select All checkbox or select individual exams or surgeries for updating.
- Click Delete to remove the exam or surgery in it’s entirety from that animal’s record.
- The Apply Selection button will enable the Status Details & Item Details Control. Meaning, the Status Details & Item Details Controls are hidden until the user clicks the “Apply Selection” button. Either both or only the Status Details will appear and be enabled based on what records have been selected.
On the Follow Up screen, the choices in the “Show” drop-down are different than other screens. The mass update functionality can only act on those records displayed on the 1st page of results, even if there are more records than shown that match the filters. The user will have to update them in batches.

Changes to the “Show” control are:
- There is no “All” option; values for this release will be 10/page & 25/page.
Once you apply the selection, if all of the items selected are of the same item type & subtype, you will see all of the sections shown above.
If you have selected multiple item types or subtypes you will only see the top “Status Details” section.
This section is the same on all Medical Sub-Tabs.

Fields/rules are:

- **Status**: choices here are Pending, Scheduled, Completed or Cancelled. This field is required, and the default is “Completed”.
- **Status Date/Time**: also required, and the default is blank for you to fill in the date/time.
  - Now button: populates Status Date/Time with current date/time.
- **Provider**: required, the default is BLANK.
- **Assistant**: optional, the default is BLANK.
- **Site**: required if sites are set up in your database, the default is BLANK.

All fields in this section are required to perform a mass-update. However, since all fields in this section will have pre-existing data from when the Pending/Scheduled record was created, even if no changes are made beyond allowing PetPoint to automatically set the Status to Completed, the mass update will run successfully.

You will also see this same Status Detail Control on the remaining tabs:

- Tests
- Vaccinations
- Treatments
• Status rules still apply, Pending and Scheduled items must have a Status Date/Time in the future, Completed and Cancelled will need a Status Date/Time. If you attempt to process a mass update outside of these rules, you may receive an error message preventing the update from occurring.

• During mass-update, if user has chosen to Cancel a given Treatment in a series, the rest of the Treatments in the series should be Cancelled – no different than if the user was manually changing that same record to Cancelled in the Treatment Tab for that
This section is only enabled if the user has selected ONLY 1 Record Subtype in the Exam/Surgery Filters. Fields/Rules are:

- **Record Type**: same field as on Exam/Surgery Details tab of the medical record but is read-only, meaning user cannot change this field during mass update.
- **Record Subtype**: same field as on Exam/Surgery Details but is read-only, meaning user cannot change this field during mass update.
- **Review Date/Time**: same field as on Exam/Surgery Details (optional, editable ONLY if user is mass-updating Status to “Completed”).
- **Notes**: This is the same Exam/Surgery Notes from Exam/Surgery Details.
The Update Exams/Surgeries button is the trigger to start the process that applies the mass-updates behind the scenes to the Exam/Surgery records selected in the Exam/Surgery Follow Up Grid using the information you have selected in the Status Details, Exam/Surgery Details, and Exam/Surgery Notes sections.

- The Clear Button resets the entire Sub-Tab back to the defaults.
- You will be able to utilize these same buttons in the remaining tabs:
  - Tests
  - Vaccinations
  - Treatments
While processing, you will read “Mass Update Processing…”

At the completion of the update, we will display a text box that will list each record that was processed successfully or unsuccessfully after the mass update runs. The list will be sorted by Successful/Failure, then by Animal #, then by Item Name.
Unless otherwise noted, the fields in the Details section will NOT populate with data when the user has selected multiple records for mass-update (they are BLANK). The fields will only populate with data if a single record is selected from the Follow Up Grid.

A blank field within Status Details or Item Details means that PetPoint should NOT overwrite/modify existing data in that field when the mass update runs. So, for blank fields in mass-update, if the fields were populated, by the user or PetPoint, when the Item was created as Pending/Scheduled or updated since, those values will remain as they were prior to performing the mass-update.

A field within Status Details or Item Details that has been populated, by the user OR by PetPoint, with data will overwrite existing data in that field when the mass update runs. So, a previously blank field may end up with data in it following the mass-update.
Exam/Surgery Review Date and Treatment Review Date rules:
- Since all records being mass-updated are either Pending or Scheduled, these fields will be blank by default. However, if user is updating the records to Completed, as part of the mass-update, these fields can be populated based on any default dates from Item Setup. Example: mass update is being done on several “Initial” Exams where the default Review Date is set to “30 Days”, Status is set to Completed, and Status Date/Time is updated to 8/1/2011 10:00 AM. Following mass update, the Exam records will all have a Review Date of 9/1/2011 10:00 AM.
A suggestion for groups who are going to be using this module regularly is to complete all past due scheduled & pending items for all tabs so that going forward the information will be accurate. If you have many past due scheduled / pending items, first use Edit: Follow Up to select everything that is scheduled AND pending for yesterday, check “include past due records”, and leave the rest of the defaults alone. Press “find.”

From Exam/Surgery Tab, check the box at the top, click Apply Selection. Then go to the bottom, change the status to completed, enter a date, then press “update exams/surgeries.”

Repeat these steps for the Tests, Vaccinations and Treatments tabs.

This should clear out any outstanding scheduled / pending items so that going forward, you have accurate / current data.

This means that all of the records you are updating in this fashion may have incorrect completion dates.
Follow Up Tests

Here you will perform mass updates of your Scheduled and Pending Tests:

- Pre-schedule tests and mark them completed in one easy step.
- Set up pending tests while waiting for test results and use this screen to record that they have been done.
- Reschedule or Cancel any Scheduled or Pending Tests in large groups to help manage your medical records.
The Tests Sub-Tab allows users to perform mass updates to Scheduled or Pending Test Records.
The Tests Filter allows users to further narrow the results by Test Type.
  ◦ Test Type: choices are “--All--” which is the default, plus all Test Items in your database.
  ◦ Apply button refreshes the records displayed in the Tests Follow Up Grid. If an individual Test Item is selected (not “--All--”) then user can update Status Details and Test Details; otherwise can only update Status Details when multiple test types are selected.
  ◦ If Test Filter is set to “all” the user will only see the Status Details.
The Tests Follow Up Grid displays all records that are due for Follow Up as-filtered by the Follow Up Filter Control. Columns are: Select (checkboxes), Animal #, ARN, Name, Test, Test For, Product/Manufacturer, Status, Status Date/Time, Record #, and Delete. All columns except Delete are click-to-sort; default sort is by Animal #, then by Status Date/Time (oldest to newest).
This section is the same on all Medical Sub-Tabs.
The fields in this section are almost identical to Test Details:

Fields/Rules are:

- **Test**: Read-only. User cannot change this field during mass update.
- **Dose Unit & Unit Type**: required.
- **Body Part**: optional.
- **Re-Test checkbox**: optional, editable only when user is mass-updating Status to “Completed.” Is only automatically checked by PetPoint if one of the Test Results (Test For Condition + Result) added manually on the Follow Up screen should trigger the checking of the box as it would on the end-user screen.
- **Re-Test Date/Time**: optional, editable ONLY if user is mass-updating Status to “Completed” and the “Re-Test” box is checked.
- **Manufacturer / Product**: required.
- **Serial/Lot #**: required or optional depending on test item setup.
- **Expiration Date**: required or optional depending on test item setup.
This section is only enabled if the user has selected ONLY 1 Test Type in the Tests Filter and if user is mass-updating Status to “Completed”. The fields in this section are almost identical to Test Results:

- Test For Condition: optional.
- Result & Result Date/Time: optional.
- Comments: optional.

Users can add additional Test Results for the Tests they have selected for mass-update in this section. The Grid will only show those they add during mass-update.

When the mass-update is applied, whatever user has added to the Test Results Grid on the Follow Up screen is actually handled as a overwrite or an addition to each Test record being mass-updated as follows:

- For Test Results on the Follow Up screen where a “Test For Condition” has been added:
  - If the “Test for Condition” on the Follow Up screen matches any of the “Test For Conditions” in a Test record being mass-updated, the mass update will overwrite the values for “Result” and “Result Date/Time” for that matching Result using the values from the Follow Up screen.
  - If the “Test for Condition” on the Follow Up screen does NOT match any of the “Test For Conditions” in a Test record being mass-updated, the mass update will add a new Result to that Test.

- For Test Results on the Follow Up screen where a “Test For Condition” is BLANK and there is a Test Result with a BLANK “Test for Condition”, the mass update will overwrite the values for “Result” and “Result Date/Time” for that matching Result using the values entered on the Follow Up screen.

- In all cases where Test Results Comments have been added on the Follow Up screen, they will overwrite whatever data is currently in a matching Test Result being overwritten.
Rules for Mass Updates - Tests

- **Re-Test checkbox & Re-Test Date**
  - Since all records being mass-updated are either Pending or Scheduled, these fields will be blank by default. However, if user is updating the records to **Completed**, as part of the mass-update, this field should be populated based on any default dates from Item Setup triggered by the checking of the Re-Test checkbox manually or automatically as a result of a “Test For” in Item Setup.
During mass-update, any fields flagged as required (such as Expiration, Serial #, Container #) in Item Setup must be filled in otherwise the mass-update will not be applied to those records.
Follow Up Vaccinations

Here you will perform mass updates of your Scheduled and Pending Vaccines:

✓ Pre-schedule vaccinations and mark them completed in one easy step.
✓ Set up pending or scheduled vaccinations during intake and use this screen to record that they have been done.
✓ Reschedule or Cancel any Scheduled or Pending vaccinations in large groups to help manage your medical records.
The Vaccinations Sub-Tab allows users to perform mass updates to Scheduled or Pending Vaccination Records.
The Vaccinations Filter allows users to further narrow the results by Vaccination Type (Vaccine Items).

Vaccination Type: choices are “--All--” (default) + all Vaccine Items.

Apply button refreshes the records displayed in the Vaccinations Follow Up Grid. If a Vaccine Item is selected (not “--All--”) then user can update Status Details and Vaccination Details; otherwise can only update Status Details.
The Vaccinations Follow Up Grid displays all records that are due for Follow Up as-filtered by the Follow Up Filter Control. Columns are: Select, Animal #, ARN, Name, Vaccine, Product/Manufacturer, Status, Status Date/Time, Record #, and Delete. All columns except Delete are click-to-sort; default sort is by Animal #, then by Status Date/Time (oldest to newest).

By default the boxes in the Select column are UNCHECKED.
This section is the same on all Medical Sub-Tabs.

Vaccination Status Details Control
This section is only enabled if the user has selected ONLY 1 Vaccination Type in the Vaccination Filter. The fields in this section are almost identical to Vaccination Details:

- **Fields/Rules are:**
  - Vaccine: read-only. User cannot change this field during mass update.
  - Type: read-only. User cannot change this field during mass update.
  - Dose Unit & Dose Unit Type: required, editable.
  - Body Part: optional, editable.
  - Route: optional, editable.
  - Length: optional, editable.
  - Re-Vac Date: optional, editable ONLY if user is mass-updating Status to “Completed.”
  - Manufacturer/Product: required, editable.
  - Serial/Lot #: required or optional depending on vaccination item setup, editable.
  - Expiration Date: required or optional depending on vaccination item setup, editable.
  - Container #: required or optional depending on vaccination item setup, editable.
• Re-Vac Date & Length rules:
  ◦ If user manually populates the Re-Vac date field when updating the records to Completed, the Length field becomes disabled.
  ◦ If user manually populates the Length field when updating the records to Completed, the Re-Vac field becomes disabled. The calculation of the Re-Vac field is based on the value of the Status Date/Time and the Length entered – meaning, this overrides any Item Setup defaults.
Follow Up Treatments

Here you will perform mass updates of your Scheduled and Pending Treatments:

- Pre-schedule treatments (food, medications, procedures and tasks) and mark them completed in one easy step.
- Set up pending or scheduled treatments during intake and use this screen to record that they have been done.
- Reschedule or Cancel any Scheduled or Pending treatments in large groups to help manage your medical records.
The Treatments Sub-Tab allows users to perform mass updates to Scheduled or Pending Treatment Records.

**Treatments Follow Up Tab**
The Treatments Filter allows users to further narrow the results by Treatment Type (Procedure, Medication, Food, or Task Item Groups) or Treatment (Items within their respective Item Groups).

Choices are:

- Treatment Type: choices are “--All--”, Procedure, Medication, Food, and Task
- Treatment: choices are “--All--” + all Treatment Items.
- Apply button refreshes the records displayed in the Treatments Follow Up Grid. If a Treatment Item is selected then user can update Status Details and Treatment Details; otherwise can only update Status Details.
The Treatments Follow Up Grid displays all records that are due for Follow Up as-filtered by the Follow Up Filter Control. Columns are: Select, Animal #, ARN, Name, Type, Treatment, Treatment Instructions (this is the same data as on Treatment Express Report: Dose + Dose Unit + Recurrence info) Product/Manufacturer, Status, Status Date/Time, Record #, & Delete.

- Clicking Delete prompts user with standard Ok | Cancel pop-up.
This section is only enabled if the user has selected ONLY 1 Treatment Item in the Treatment Filter. The fields in this section are almost identical to Treatment Details:

**Fields/Rules are:**

- **Treatment Type:** read-only. User cannot change this field during mass update.
- **Treatment:** required, read-only. User cannot change this field during mass update.
- **Dose Unit & Unit Type:** required, editable.
- **Body Part:** optional, editable.
- **Route:** optional, editable.
- **Review Date/Time:** optional, editable ONLY if user is mass-updating Status to “Completed”
- **Manufacturer/Product:** required, editable.
- **Serial/Lot #:** required or optional depending on treatment item setup, editable.
- **Expiration Date:** required or optional depending on treatment item setup, editable.
- **Container #:** required or optional depending on treatment item setup, editable.
Each recurring treatment will have a line in the Exam Treatments, and each scheduled treatment will have its own line in the Scheduled & Pending Treatments section.

50 is the maximum number of treatments that can be added at one time.
To cancel one instance or a whole series, select the treatment in question, change the status to “cancelled”. When you “update treatment,” you will be prompted to cancel just this instance, or cancel the whole series.
A final change to medical functionality is that review dates, if they are automatically set based on default setup, do not trigger scheduled items if they are part of a recurring series, on treatments after the initial item. This is because otherwise, these completed items that are being completed as part of follow-up, for example, could keep triggering infinite recurrences, and cause a slowdown in performance.
If you require assistance with the topics in this guide, please contact the PetPoint Customer Support Team at (866) 630-7387 x 400 or techsupport@petpoint.com or through the Admin Feedback section in PetPoint.

Questions?