

Treated List

23/10/2024 10:15 am BST

Summary

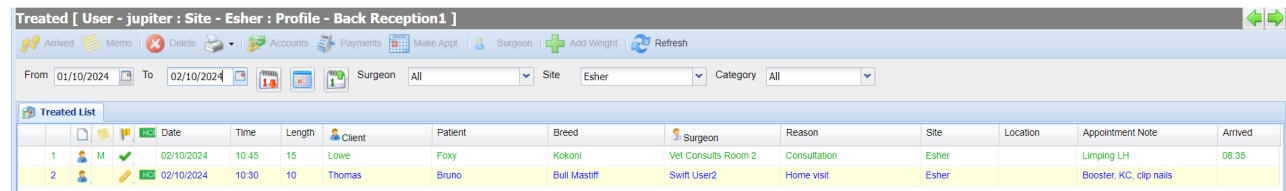
The Treated List shows all appointments with the status 'Treated' for the current day's appointments (unless another date range is specified).

Details

The Treated List can be accessed via the main toolbar or via the 'Daylists' menu.

Once selected, the Treated List will display showing any appointments with the status 'Treated'.

Appointments that have been treated are displayed in **BLUE**, and this provides a visual reference to show any appointments that the practice needs to take a payment for. Any appointments that have been paid will display in **GREEN**.



The screenshot shows the 'Treated List' window with a toolbar at the top containing icons for Arrived, Memo, Delete, Accounts, Payments, Make Appt., Surgeon, Add Weight, and Refresh. Below the toolbar are filters for 'From' (01/10/2024), 'To' (02/10/2024), 'Surgeon' (All), 'Site' (Esher), and 'Category' (All). The table below has columns: Date, Time, Length, Client, Patient, Breed, Surgeon, Reason, Site, Location, Appointment Note, and Arrived. Two rows are visible, both highlighted in blue.

	Date	Time	Length	Client	Patient	Breed	Surgeon	Reason	Site	Location	Appointment Note	Arrived
1	02/10/2024	10:45	15	Lowe	Foxy	Kokoni	Vet Consults Room 2	Consultation	Esher		Limping LH	08:35
2	02/10/2024	10:30	10	Thomas	Bruno	Bull Mastiff	Swift User2	Home visit	Esher		Booster, KC, clip nails	

Using the Treated List

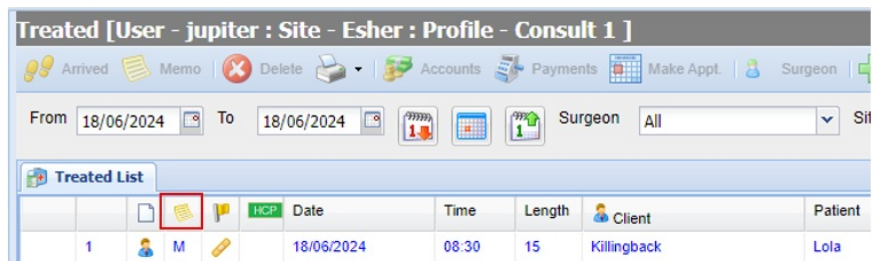
Filtering the Treated List

All appointments for the dates specified will display. You can change the date range by using the date filters provided. It is also possible to filter by Surgeon, Site and/or Client Category.

Appointment Memos

You can create a Memo for any of the Daylists. To do this, select the required appointment and click the Memo button.

When a Memo has been saved for an appointment, an M will appear in the Memo column of the day lists.

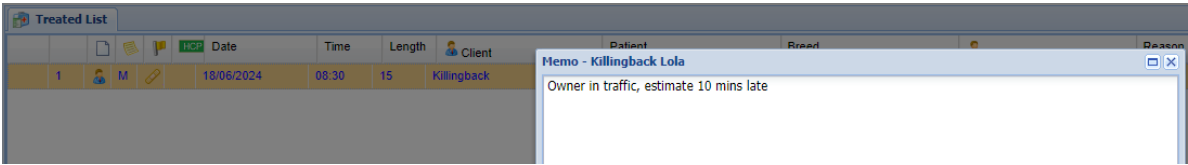


The screenshot shows the 'Treated List' window with a toolbar at the top containing icons for Arrived, Memo, Delete, Accounts, Payments, Make Appt., Surgeon, and a green checkmark. Below the toolbar are filters for 'From' (18/06/2024), 'To' (18/06/2024), 'Surgeon' (All), and 'Site'. The table below has columns: Date, Time, Length, Client, Patient, and a Memo column. One row is visible, highlighted in blue, with an 'M' in the Memo column.

	Date	Time	Length	Client	Patient	Memo
1	18/06/2024	08:30	15	Killingback	Lola	M

To view the previous Memo or to create a new one, click on the client, then click on the Memo tab, or right click the appointment and select 'Appointment Memo'. To write a new Memo, write in the

white area of the window and click Save.



Right-click Options

Select a patient from the list and right-click to display the below options:

Function	Description / Function
Set Priority	Priority levels 1-10. If set, this block of colour will show in the first column in the Treated List.
Set Unarrived	The appointment will be change back to its previous status.
Set Failed to Show	Appointment will change to BLOCK GREY .
Set Cancelled	Cancels the appointment and the appointment will change to NEUTRAL BROWN .
Set Paid	The appointment will change to GREEN to indicate the client has paid.
Appointment Memo	An 'M' will appear in the fourth column, indicating there is an additional note against this appointment.
Edit Appointment	Allows the user to edit the Appointment Reason and Note.
Delete Appointment	Allows the user to remove the appointment. This will remove from the Treated List and Diary screen.
Print Appointment Label	Prints an Appointment Label to the practice's label printer. This details the appointment date, time, reason and surgeon.
View Appointment Trail	Displays an audit trail for the selected appointment.
Send to Kennel	Sends the Patient to a Kennel .
Clipper	Add the Patient and Client Details to the Clipper .
Add Weight	Opens the Add Weight window.
Payments	Opens the Payments window.

Show Referrals Consent	Shows the patient's registered referral details. Opens the Consent form window.
View History	Displays the Patient's Treatment history in a pop-up window.
View PACS	If the practice makes use of a cloud-based PACS system, selecting this option will show any uploaded images in a new tab.

Exporting the Treated List

The Treated list can be printed, emailed or exported to CSV file

