

Patient Record in More Detail

12/08/2025 1:24 pm BST

Summary

This page looks at the patient record in more detail and includes what functions are available to use.

Transfer Patient

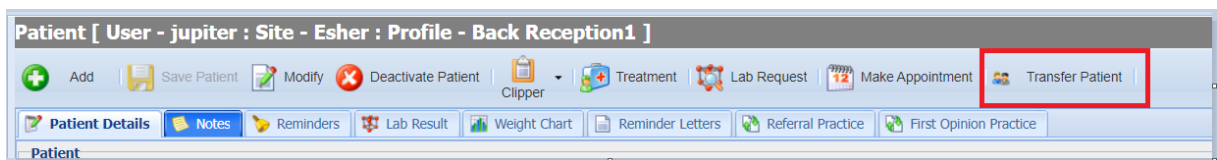
The transfer patient functionality allows you to transfer a patient from one client to another in the event of the animal being re-homed, sold etc.

Note: You are unable to transfer a patient if they are joined onto a Health Care Plan.

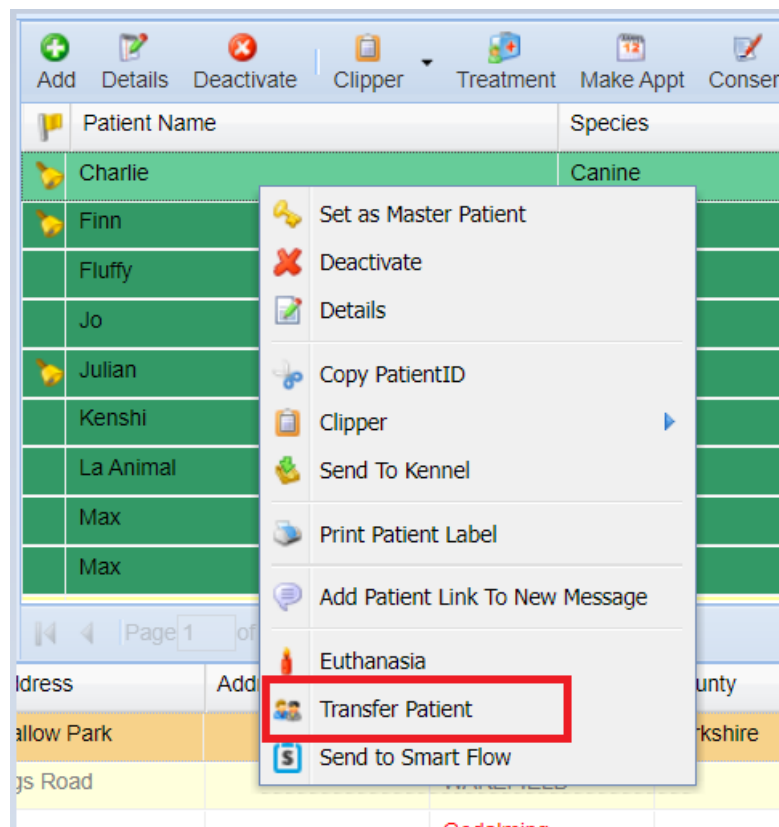
Note: This process does not transfer financials associated to the patient. If you wish to move debt, the process would be to perform a manual write off on the existing account and surcharge the new clients account.

Transferring a Patient

1. Search for and select the patient you wish to transfer.
2. Go the patient details screen.
3. Select the 'Transfer Patient' button.



4. Alternatively, select the patient from the reception search, right click and press 'Transfer Patient'

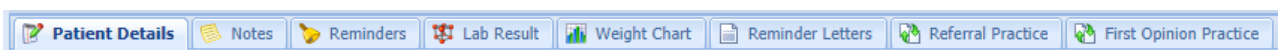


5. Once selected, the Transfer Patient window will appear. Search for the client you wish to transfer the patient to using the fields provided.
6. Once you have selected the Client, select 'Transfer'.
7. Once you have selected 'Transfer', the below window will appear prompting you to confirm and insert a reason for the transfer.
8. Once transferred, a confirmation message will appear. It will provide two options to proceed. You can either continue onto the current you have transferred the patient from or navigate to the client you have transferred the pet to.

Patient Details

Patients can be registered to new and existing clients.

Within the Patient Details screen, there are eight tabs - each of which hosts a different subsection of patient details.



Each tab is documented below:

Patient Details Screen

This screen is used to modify or register a new patient.

For information on how to register a patient, see: [Registering a Patient](#).

For information on how to modify a patient, see: [Modifying a Patient](#).

Cancel Save Patient Modify Deactivate Patient Clipper Treatment Lab Request Make Appointment Transfer Patient

Patient Details Notes Reminders Lab Result Weight Chart Reminder Letters Referral Practice First Opinion Practice

Patient
 Patient Category * Small Animal Last Visit 05/09/2024 Yard Name
 Name * Milo Registered 04/04/2023 Yard Town
 ID 1266872 Date Of Birth 04/07/2017 Enter Age Yard Postcode
 Species * Canine Age 7 Years 2 Months 5 Days old Additional Name 1
 Breed * Dalmatian Weight 18 Kg Additional Name 2
 Colour Black & White Deceased Insurance Plan AVIVA Additional Name 3
 Gender Male Policy No 00000000 Additional Name 4
 Preferred Surgeon Policy Start 29/08/2023
 Microchip No ☐ Cross Breed ☐ Imported Animal Case No
 Discount Category

Anti Parasitics
 Flea Prevention Advocate
 Last Flea 25/06/2024
 Last Wormed 25/06/2024
 Fixed Notes

Other Information
 Loyalty Card
 Issued On
 Usage
 Height
☐ Sold/Re-homed on

Conditions
 Allergic to Penicillin

Patient Notes

The notes tab can be used to record any notes related to the patient. These may be notes about certain over-riding conditions or about the patient's temperament.

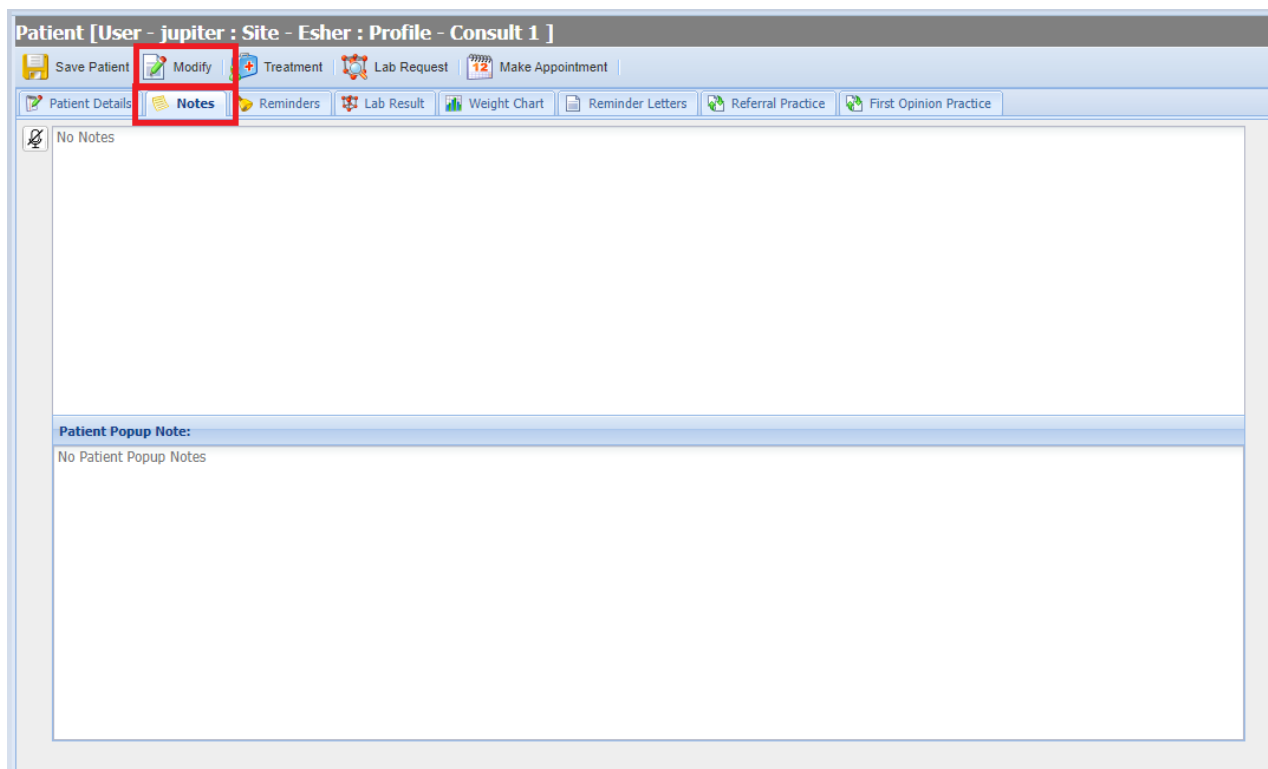
Notes stored here are also displayed in the notes section of the [Patient Summary Bar](#).

Add a Patient Note

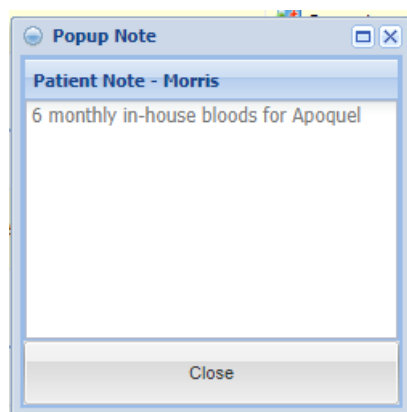
1. Enter 'Patient Details' screen.
2. Select the 'Notes' tab.
3. Add/amend the notes section.
4. Once finished with adding/amending the notes press the 'Save' button.

Patient Pop-Up Note

Pop up notes can be stored per patient. Upon entering the individuals record, the pop-up note relating to their name will show.



To add a patient pop-up note, select the 'modify' button, add the note then click 'save'.



Note: Patient pop-up notes needs to be enabled within [Settings](#).

Reminders

The Reminders tab within the Patient Details area serves two purposes. It allows you to view all Reminders which are active for a patient and it allows you to manually add, remove or edit a patient's reminders.

Add a Reminder

1. Enter the 'Patient Details' screen
2. Select the 'Reminders' tab.

3. Enter the 'Date given' field and select the required date.
4. Select the 'Reminder Type' from the drop down list and select the product from the 'Description' field.
5. The length of the reminder will populate automatically.
6. Select the 'Save' button to add the reminder.

| Reminder Type | Date Given | Date Due | Description | Work Site | Client Site |
|----------------|------------|------------|---------------------------------------|-----------|-------------|
| 1 Dog Vaccine | 04/06/2024 | 04/06/2025 | Recall Set By Reception - Dog Vaccine | Esher | Esher |
| 2 Kennel Cough | 03/01/2024 | 03/01/2025 | NOBIVAC KC | Esher | Esher |

Lab Result

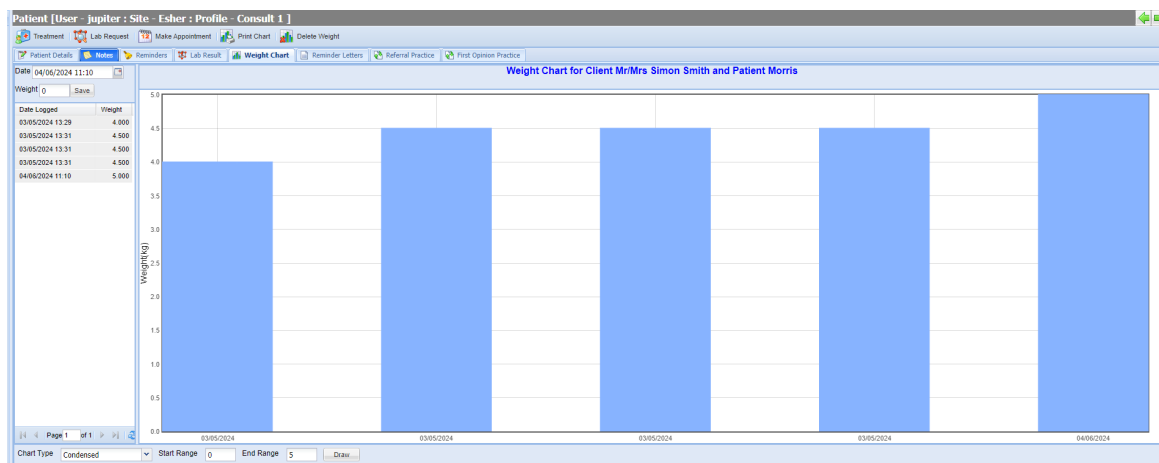
The Lab Result tab shows all stored lab results for the selected patient from either Internal Lab equipment or External Labs.

See the following pages for more information: [Internal Labs](#) and [VetXML Labs](#)

Weight Chart

The Patients Weight Chart can be accessed and updated via the Patient Details area, by clicking on the Weight Chart tab. Weights updated in other areas of the application are automatically added to the Weight Chart.

Note: The type of chart displayed can be selected from the 'Chart Type' drop down.



Add Weight options

1. Enter the Patient Details screen, Modify, add weight, Save
2. Right click on an appointment booked in the Diary and press 'Add Weight'
3. Enter the patient History screen, select Weight and either Add Weight or view Weight Chart

Reminder Letters

The Reminder Letters tab is a list of all letters which have been sent to the patient.

| Patient Details Notes Reminders Lab Result Weight Chart Reminder Letters Referral Practice First Opinion Practice | | | | |
|---|-----------|-------------|---------------|---------------|
| Description | Work Site | Client Site | Reminder Date | Reminder Type |
| 1 NOBIVAC KC | Esher | Esher | 04/11/2024 | Kennel Cough |

Referral Practice

The Patient Referral screen allows you to log where a patient has been referred from, when and why this occurred.

Note - All referral information can be added into separate library areas. Administration > Patients > Referral.

Adding a Referral

1. Enter a 'Case number' relevant to the practice. The more referrals you add, you can increase the case number each time.
2. Select a 'Referral Category'.
3. Select a 'Referral practice' from the drop down menu.
4. Note: Internal/External practices can be identified by the I/E icon.
5. Select a 'Referral Vet'.
6. Select the 'Initial Referring Date', this will automatically be today's date.
7. Select the 'Reason' for the Referral from the drop down list.
8. Type in the 'Notes' and select 'Register'.

Patient [User - jupiter : Site - Esher : Profile - Consult 1]

Treatment Lab Request Make Appointment

Patient Details Notes Reminders Lab Result Weight Chart Reminder Letters **Referral Practice** First Opinion Practice

Details

Case No.

Referral Category

Referral Practice

Referral Vet

Initial Date

Referral Reason

Ext. Practice Reason

Referring Vet

Notes

Practice Details

Postcode

Tel

Fax

Email

Vet Details

Tel

Direct Email

First Opinion Practice

The First Opinion Practice Screen allows you to log where a patient has been referred from, when and why this occurred.

Note - All First Opinion information can be added into separate library areas. Administration > Patients > First Opinion.

1. Enter a 'Case number'.
2. Select a 'First Opinion Category'.

3. Select a 'First Opinion practice' from the drop down menu.
Note: Internal/External practices can be identified by the I/E icon.
4. Select a 'First Opinion Vet'.
5. Select the 'First Opinion Date', this will automatically be today's date.
6. Select the 'Reason' for from the drop down list.
7. Type in the 'Notes' and select 'Save'.

Patient [User - jupiter : Site - Esher : Profile - Back Reception1]

Buttons: Add, Save Patient, Modify, Deactivate Patient, Clipper, Treatment, Lab Request, Make Appointment, Transfer Patient

Tabs: Patient Details, Notes, Reminders, Lab Result, Weight Chart, Reminder Letters, Referral Practice, **First Opinion Practice**

Details

Case No. 130

First Opinion Category * Neurology

First Opinion Practice * Mr Jones Vets

First Opinion Vet * G Silvester

Initial Date 15/02/2023

First Opinion Reason * Refer: Neurology

Notes

Practice Details

5-9

Long Street

Woking

Surrey

Postcode GU21 3VS

Tel 0845 2000 725

Fax

Email

Vet Details

Mr G Silvester

Tel

Direct Email

First Opinion Category Filter: All

| | Case Number | Reason | Vet | Practice | Date | Category |
|---|-------------|------------------|-------------|---------------|------------|-----------|
| 1 | 130 | Refer: Neurology | G Silvester | Mr Jones Vets | 15/02/2023 | Neurology |