

# Summary Side Panel

08/11/2024 3:38 pm GMT

## Summary

The Summary Side Panel provides a quick summary of a patient's details, next appointment and reminder details.

Once a patient has been selected, this bar can be viewed whilst navigating to other areas of the system.

## Using the Summary Side Panel

The Patient Summary Side Panel can be accessed from any screen by selecting the double-arrow icon on the top left of the screen, once a client has been selected.

The screenshot displays the Reception software interface. At the top, a title bar reads "Reception [ User - jupiter : Site - Esher : Profile - Back Reception1 ]". Below this is a menu bar with icons for Clear, Save, Modify, Deactivate, New Document, Accounts, Payments, Appointments, Deliveries, Print, and Send. A sub-menu bar includes Client Details, Additional Info, Notes, Documents, Communication, Data Consent, and Advanced Search. The main area is divided into sections: Client, Address, and Tel and email. The Client section shows Title (Mr/Mrs), Surname (Watkiss), First Name (Susannah), Category (Mixed), and Reg. Date (23/05/2022). The Address section shows Category (Home), Name/No (123), Address (Watkiss Street), Town (Leeds), County, and Postcode (LS252GH). The Tel and email section shows Home, Business, Personal Mob. (07790 123456), Fax, and Personal Email (email@email.co.uk). A table at the bottom lists patient details: Title, Surname, First Name, Name/No, Address, Address 2, and Town. The table shows one entry: Mr/Mrs, Watkiss, Susannah, 123, Watkiss Street, and Leeds. A red box highlights a double-arrow icon in the top left corner of the interface.

Title	Surname	First Name	Name/No	Address	Address 2	Town
Mr/Mrs	Watkiss	Susannah	123	Watkiss Street		Leeds

Selecting this icon will open the side bar as shown below:

**Reception [ User - jupiter : Site - Esher : Profile - Back Reception1 ]**

Clear Save Modify Deactivate New Document Accounts Payments Ap

**Client Details** Additional Info Notes Documents Communication Data Consent A

**Client**

Title Mr/Mrs Patient Chip ID Stable Reg. Date 23/05/2022

Surname \* Watkiss Patient

First Name \* Susannah Category \* Mixed

**Address**

Category Home

Name/No 123

Address \* Watkiss Street

Town \* Leeds

County

Postcode \* LS252GH

☒ This is the mailing address

**Tel and email**

Home

Business

Personal Mob. \* 07790 123456

Fax

Personal Email\* email@email.co.uk

Introduced By Introduced by ...

Contact ID 1217880

☐ Show Deactivated Site Esher

Title	Surname	First Name	Name/No	Address
Mr/Mrs	Watkiss	Susannah	123	Watkiss Stre

**Conditions**

ongoing arthritis

**Notes**

will be brought in by GD rather than owner

Last Wormed	N/A
Last Flea	N/A
Insurance	Co-op
Start	N/A
Number	N/A
HCP Tier	

No Next Appointment

**Reminder Summary**

No Reminders

This bar contains the following information:

**T Pointer (TPointer)**

**Conditions**

ongoing arthritis

**Notes**

will be brought in by GD rather than owner

Last Wormed	N/A
Last Flea	08/11/2024
Insurance	Pet Plan
Start	01/01/2019
Number	123456789
HCP Tier	

Next Appointment:  
13/11/2024 at 09:40

**Reminder Summary**

Kennel C... **Overdue** expired 01/11/2024

Annual ... due 02/09/2025

**Compliance Reminder Summary**

Due Date (08/12/2024) flea treatment

Due Date (07/01/2025) flea treatment

Due Date (06/02/2025) flea treatment

Preferred Surgeon

Patient Conditions - Double click in the box to add/edit conditions

Patient Notes - Double click in the box to add/edit notes

Last Wormed Date  
Last Flea Date  
Insurance Company  
Insurance Start Date  
Policy Number  
Health Care Plan Tier

Next Appointment Date and Time

Summary of Patient Reminders - Hover over reminder for more information. Double click to enter Reminders screen

Summary of Compliance Reminders

Note: Users have the choice of which patient reminders show in the 'Reminder Summary' section.

This is by using the tick boxes within the reminder types library.

Reminder Types				
<div><input type="text"/></div> <div><div>Search</div><div>Refresh</div><div>Delete</div><div>Paragraphs</div></div>				
Name	Description	Treatment Type	View Order	Always show in Summary
		All	0	<input type="checkbox"/>
6 month health check	6 month health check	All	0	<input type="checkbox"/>
AB Dog Annual Booster	AB Dog Annual Booster	All	0	<input type="checkbox"/>