CHAPTER 11: REMINDERS

AVImark lets you specify the conditions under which you want to remind for any treatment and/or inventory item you select.

In this chapter, you will learn how to:

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Set up a Reminder

- From the Treatment/Inventory List, select the treatment or item you would like to remind for.
- Right-click and from the shortcut menu click Reminder to display the Reminder Template.
- You will need to click Yes to confirm.
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**Code/Description**  
AVImark will insert the Treatment code and Description for you when you choose to create or update a Reminder Template.

**Species**  
You may choose 2 species. If the reminder applies to all species, you will not need to select a species.

- Use the **Species** drop down list and select the correct species.

**Show in Vaccine History**  
- Check this option to have the reminder displayed in the patient’s Vaccine History window.

**Remind every**  
This allows you to specify the interval of time in which the patient should receive the treatment.

- Type the number in the first box and then using the drop down menu select the periodicity. (For example 1, Year).

**Remind if never treated**  
This field will be used in conjunction with the Start/Stop reminding fields. If this box is not checked, a patient who has never received the treatment will NOT receive a reminder for it until the treatment has been put into the patient’s medical history.

- If appropriate, select this box to remind patients as they come due the first time in their life, based on the patient’s age.

**Start/Stop reminding**  
You may specify when you want reminders to start and stop for this treatment. If you do not want to remind for the treatment until it has been performed at least once on any given patient, do not check the **Remind if never treated** box and do not specify a **Start reminding** age, just leave the fields blank.

- If appropriate, use the second field and the drop down list from the third field to specify the **Start reminding** age. Typically, the **Stop reminding** field would be left blank.

**Patient to be treated**  
This allows you to specify the number of times a patient should have the treatment done in its lifetime.

- Type the number value and click **Done** to finish the template.

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**For setting up more complicated treatment series, you may contact our experienced Technical Support staff at 877-838-9273, option 1.**

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Print Reminder Templates

In order for us to assist you with setting up your reminders in the most efficient way, we recommend that, before you apply your reminder templates, you print them and FAX them to us for review. Templates may be faxed to 573-223-4306.
• From the Treatment List, open the Reminder menu and click Print templates to display the Print Reminder Templates window.
• Using the Print to drop down list select the correct printer.
• If applicable, use the Restrict to drop down list and select the species you wish to Restrict to.
• Click Print. To preview the templates on screen, select Preview and click Print.

Apply a Reminder on a Single Treatment

AVImark gives you the ability to update reminders for all your patients to include the current specifications for the selected treatment.

• From the treatment list, select the treatment that you want to apply the reminder for.
• Right-click and from the shortcut menu click Reminder to display the reminder template.
• Click Apply at the bottom of the reminder template to display the Applying Reminders to Patients window.

![Applying Reminders to Patients](image)

- Select the option which applies to the reminder you are applying. They are:
  - Add this Reminder
  - Add entire Series
  - Remove This Reminder
  - Change Existing Reminder

- Click Apply to begin the scheduling process.

Apply Reminders Globally

In addition to having the ability to update reminders individually, AVImark allows you to Update/Apply all your reminders which you have added or changed at one time.

• From the Treatment List, open the Reminders menu and click Apply.
• You will need to click Yes to confirm.

![Start Applying](image)

- Click Continue to start the scheduling process.
Patient Specific Reminders

AVImark lets you specify the conditions under which you want to remind for any treatment and/or inventory item you select. You do this in what are called Reminder Templates, which are normally set up for each treatment and applied to all patients at once. In addition, AVImark allows you to add or change a reminder from the Patient Area reminder folder. Adjusting the reminder from the folder now makes the reminder specific for this patient.

- From the CID Patient Area Reminder folder, right-click and from the shortcut menu click New to display the Patient Reminder Template.
- Set up the template appropriate for this patient and click Done.

Change a patient reminder template

When a given reminder is appropriate for certain patients, but due to special circumstances you need to change the reminder template and how it applies to this particular patient.

- In the Reminder folder, right-click and from the shortcut menu click Change to display the Patient Reminder Template.
- Adjust the template appropriate for this patient and click Done.

Purge Reminders

AVImark allows you to purge patient reminders that are due prior to a specific date.

- On the CID, open the Utilities menu. Click Purge Files to display the Purge System Files window.
- You will need to click Yes to confirm.
- Select the Remove ALL patient reminders option.
- Select Keep reminders due after and use the drop down calendar to select the date.
- Click Purge. When the purge process is complete, AVImark will automatically close.

Print Reminders/Reminder Analysis

When you choose to print all reminders, AVImark will perform the reminder analysis using the values and limitations you have set up in the Reminder Analysis Window. Reminders will be printed for those patients selected as coming due or are overdue for any of the periodic treatments, items or diagnoses you have specified.

- On the CID, open the Work with menu. Click Reminders to display the Work with Reminders window.
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Print To
- Use the Print to drop down list and select the correct printer.

Starting date/For
AVImark lets you find patients who are due for remindable treatments during a reminder window of time which you define by setting a start date, then specifying a number of days.
- Using the Starting date drop down calendar, select the start date and then enter the number of days in the For field.

Company
You may limit the printing of reminders to a certain company number.
- If appropriate, type the company number.

Include
This field allows you to tell AVImark what information to include on the analysis report.
- Select the Reminder details option to include a list of clients/patients that are due for reminders as well as a summary of the analysis.
- Select the Response information option to include response data for the period being analyzed.
- Select the Print summary only option to limit the report to a summary of clients/patients due for reminders.

Sort By
This allows you to sort the reminder documents.
• Select the appropriate Sort by option.

**Restrict To Species**
You may limit reminders to a selected species.
• If appropriate, use the Species drop down list and select a species.

**Start at Account no.**
In the event the printing process was interrupted or you are unable to complete the printing once started, you may specify a client account number for the last reminder card that printed and begin printing again.
• If appropriate, type the client’s account number to commence printing from that account number forward.

**Last information search**
Allows you to restrict the printing of reminders using the results of the last information search you ran.
• If applicable, select this option.

**Limiting reminders**
You may use the check boxes in the Print column to limit past due reminders. If you do not want to send second and/or third reminders, you must uncheck both the second and third reminder check boxes. Do not uncheck the first box, you must send at least the first reminder for the period specified in the analysis window.

**Mailing labels**
You may choose to print mailing labels for your reminder post cards.
• After the reminder cards have printed select Mailing labels.
• Using the Style drop down menu select the label style.
• Using the Print menu, select Reminders again to print the labels.

**Merge file**
AVImark lets you merge reminder information, creating a text file that contains client and patient reminder information. Once merged, this file can be located within the AVImark folder.
• If appropriate, select the Merge file option and type a name you would like to give this merge file.
• Using the Print menu, select Reminders to merge the file.

**Reminder Organizations-Healthy Pet®, Pet Quarterly®, Paw Print®, US NetCom®, Jabez Communications Group® or AVImark**
AVImark allows you to send the appropriate reminder file(s) to your chosen organization. If you have specified an organization and Clinic ID number in Hospital Setup, Advanced AVImark will automatically insert that number in the Merge file field for you and display the Healthy Pet®, Paw Print®, Pet Quarterly®, AVImark or Netcom® Button.
• Ensure your internet connection has been established.
• As discussed previously, specify the date range that is appropriate for the reminder period.
• Select the Healthy Pet®, Pet Quarterly®, Paw Print®, US NetCom®, Jabez Communications Group® or AVImark to send the results to that organization.

**Remind For**
You may specify which treatments and/or items to include and/or exclude.
• Select the treatment to include or exclude and use the < or > buttons to move the treatment. To move all at once use the << or >> buttons.
Excl. patient specific
You may exclude Patient specific reminders when excluding other remindable treatments or items.

- If appropriate, select this option.

Printing Reminders
After specifying the appropriate options you are then ready to print the reminders.

- From the Print menu select Just One to print just one reminder card for the patient currently open on the CID screen.
- From the Print menu select Reminders to begin printing the reminder cards.

Print Analysis
The analysis report will list those patients who are due for a reminder for the time frame specified. To include detailed information on the report select the desired option under the Analysis window on the Work with Reminders window.

- From the Print menu select Analysis to print the report

To learn more about:
Reminder Analysis
Save/Email the Reminder Analysis
Print Just One Reminder

Search the Help for:
Reminder Analysis
Print-Work with Reminders
Printing Reminders

Print Reminders using AVImark or MS Word®
AVImark allows you to use the regular AVImark Notes window to create reminder text to be printed on post card documents or you may use MS Word® to create your reminder documents. For detailed information on creating reminder text, refer to.

Use AVImark
If you have selected to use AVImark to create your reminders, the reminder names will automatically be inserted in the First, Second and or Third Document fields.

Use MS Word®

- Double click in the First, Second and or Third Document field to display the Open window.
- Double click on the document name you intend to use. The same document name must be used for First, Second and/or Third reminder text.

Consolidated
AVImark allows you to print one reminder document per household rather than one per patient. If you intend to print consolidated reminders using MS Word, you must have the Reminders per page option in Hospital Setup set to One.

E-Mail Reminders
AVImark allows you to send reminder messages via e-mail to those clients who have valid e-mail addresses and own animals that are either due or past due for remindable services. You will do this in two steps; by printing reminders for those clients who do not have an e-mail address, and then sending e-mail messages to those that do.

- For those clients with no e-mail address, print reminders using the instructions as previously discussed.
- After printing, open the E-mail menu. Point to Message and click First reminder, Second reminder, and/or Third reminder to display the E-mail message window.
- Type the reminder message you wish to send (you may use all the normal notes window functions when creating the message) and click **Done**.
- On the **E-mail** menu, click **Send**.

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