CHAPTER 3: TREATMENT LIST

The Treatment List contains all of your services that you perform for your patients. In setting up your Treatment list you will need to create Treatment categories, assign charges, create doctor’s instructions, and so on. The AVImark Treatment List window identifies Treatment categories, treatments within each category and a Selected Treatment section.

In this chapter you will learn how to:

“Set up your Treatment Categories” on page 1
“Undelete a Treatment Category or Individual Treatment” on page 4
“Mark Up Treatment Prices” on page 4
“Add a Treatment” on page 7
“Work with Attachments” on page 13
“Attachments: Add Doctor’s Instructions” on page 13
“Associate Treatments/Items” on page 14
“Link Associated Inventory and Specify Usage” on page 15
“Link Associated Treatments/Diagnosis/Problems” on page 16
“Create a Treatment Group” on page 17
“Add More Stuff (Additional Data Fields)” on page 18
“Use the Treatment List Shortcut Menu” on page 21
“Print the Treatment List” on page 24
“Print a Travel Sheet” on page 24

Set up your Treatment Categories

When you start using AVImark you will probably want to add, remove, and/or change each Treatment Category to customize its different characteristics to suit your clinic.

To work with the Treatment List, open the Work with menu and click Treatments.
Add or change a Treatment Category

- Point in the Treatment Categories list window. Right-click and from the shortcut menu click New to display the Change Treatment window.
- Enter the appropriate information into each field and click Done to add or change the category.

Category
This is the descriptive name given to each category to identify it in most AVImark functions.

- Type the name you wish to give the new category.

Report Codes
Report codes are user-defined letter characters used for grouping performed treatments together on certain reports (Treatment Control Log, Patients by Treatments, Income by Treatment, Transaction Summary, and Sales Summary). You can have up to 7 codes for each category. Some codes are pre-programmed for the more common reports. They are:

- Lab services (L)
- Surgery (S)
- Injections (I)
- Prescriptions (P)
- Vaccinations (V)

- If appropriate, choose or type a Report code for the new category.

Markup Percentage
The Markup percentage is the default percentage used to mark up the prices of the treatments in this category.

- If appropriate, type or choose the Markup Percentage (as a decimal value or whole number) for this category. You can always type a different Markup percentage at the time you initiate the actual mark up process.
**Account number**
To interface with QuickBooks®, you will need to enter the income account number that you set up in QuickBooks® as the account in which to record the income generated from treatments within this category. If specified, this account number is used as the account name for QuickBooks® instead of the Treatment Category name.

- If appropriate, type the income account number that you have set up in QuickBooks®.

**Report name**
The Category Report name must be given for use in the End-of-Period reports. This name can be different or the same as what was typed in the Name field.

- Type a Category Report name.

**Whiteboard**
This field represents the Whiteboard categories that are set up in “System Tables”. They are used to group and organize treatments on the ‘Whiteboard’.

- Use the **Whiteboard** drop-down list and select the Whiteboard category you wish to assign to this category.

**Company**
Having the ability to assign company numbers to individual codes as well as entire categories allows detailed reporting by company to be much more accurate. This same number can be assigned to multiple items.

- If appropriate enter the desired company number for reporting purposes.

**Remove a Treatment Category**

- Select the Treatment Category you wish to remove. Right-click and from the shortcut menu click **Remove**.
- You will need to click **Yes** to confirm.

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**Removing a Treatment category also removes all treatments within that category.**

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**To learn more about:**

- Using Report codes

**Search the Help for:**

- Report codes
Chapter 3: The Treatment List

Undelete a Treatment Category or Individual Treatment

AVImark gives you the ability to undelete Treatment Categories or individual treatments from within the category.

- Point in the Treatment Categories window. Right-click and from the shortcut menu click Undelete to display the Undelete Treatment Categories window.
- Use the SPACEBAR or right-click and from the shortcut menu click Select on the categories and/or individual treatments you wish to undelete.

Mark up Treatment Prices

The Markup Percentage is set up on each Treatment category. This is the default percentage that AVImark will use to mark up the treatment prices (unless otherwise directed). AVImark lets you mark up your treatment prices in three ways; by category; all categories, or by individual treatments.

Mark up treatments in one or all categories

- Select the Treatment category you wish to mark up.
- Right-click and from the shortcut menu click Markup to display the Mark up Treatment Prices window.
- Use the Mark up drop-down list and select either This category or All categories.
- Use the By drop-down list and select by Category to mark up prices by the default percentage specified for your categories, or type a percentage you wish to mark up this category by (use whole numbers).

Mark up individual treatments

- From the Treatment List for window, select the treatment you wish to mark up.
- Right-click and from the shortcut menu click Markup to display the Treatment Mark up window.
- Under Increase select to increase Price of This Treatment.
- Use the By drop-down list and select by Category to mark up prices by the default percentage specified for your categories, or type a percentage you wish to mark up this category by (use whole numbers).
Rounding prices
You may round off marked up prices larger than a certain amount to the nearest increment. Furthermore, you may then subtract a specified amount from the result of the mark up to arrive at the final price.

For example: *Let’s say you would like to mark up all prices in the selected category by 5% and at the same time round off all prices over $10.00 to the nearest 10 cents, all prices over $25.00 to the nearest $1.00 minus 5 cents, and finally all prices over $100.00 to the nearest $10.00, minus 5 cents.* See Figure 3, “Mark up Treatment Prices Window”.

- In this example, the first thing you would do is enter 5 in the **By %** field.
- In the Rounding Prices dialogue box, click on the top line in the “If greater than” column. Specify 10.00 in this field and 0.10 in the “Round to” column.
- Next, on the middle row, specify 25.00 in the left column, 1.00 in the center column and 0.05 in the right column.
- Finally, on the third row, specify 100.00 in the left column, 10.00 in the center column and 0.05 in the right column.
- To review the proposed mark up results before finalizing the mark up process, ensure the **Review before markup** box is checked and click **Continue**.
- By using the appropriate rounding Advanced Options in Hospital Setup you can have AVImark default to specific rounding options when the Mark Up window is opened.
The Mark up Analysis window
In the Mark up Analysis window you can review the proposed mark up results before actually marking up your prices. Once you click **Continue** from this window, AVImark will mark up prices as directed.

<table>
<thead>
<tr>
<th>Category</th>
<th>Code</th>
<th>Description</th>
<th>Price</th>
<th>Actual Markup</th>
<th>Markup Per</th>
<th>New Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Examinations</td>
<td>2411</td>
<td>Cardiac - Fax</td>
<td>41.00</td>
<td>0</td>
<td>25</td>
<td>51.50</td>
</tr>
<tr>
<td>Examinations</td>
<td>2410</td>
<td>Cardiology - Phone/Fax</td>
<td>60.00</td>
<td>0</td>
<td>25</td>
<td>75.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>2390</td>
<td>Emergency, Fee A</td>
<td>25.00</td>
<td>0</td>
<td>25</td>
<td>31.50</td>
</tr>
<tr>
<td>Examinations</td>
<td>2391</td>
<td>Emergency, Fee B</td>
<td>30.00</td>
<td>0</td>
<td>25</td>
<td>37.50</td>
</tr>
<tr>
<td>Examinations</td>
<td>2392</td>
<td>Emergency, Fee C</td>
<td>35.00</td>
<td>0</td>
<td>25</td>
<td>44.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>2360</td>
<td>Examination</td>
<td>24.00</td>
<td>0</td>
<td>25</td>
<td>30.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>2170</td>
<td>Examination - 2nd Opinion</td>
<td>32.00</td>
<td>0</td>
<td>25</td>
<td>40.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>2172</td>
<td>Examination - 2nd Opinion</td>
<td>20.00</td>
<td>0</td>
<td>25</td>
<td>25.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>2400</td>
<td>Examination w/Vaccinations</td>
<td>0.00</td>
<td>0</td>
<td>25</td>
<td>0.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>2361</td>
<td>Examination, 2nd Animal</td>
<td>16.00</td>
<td>0</td>
<td>25</td>
<td>20.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>2380</td>
<td>Examination, Comprehensive</td>
<td>32.00</td>
<td>0</td>
<td>25</td>
<td>40.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>2381</td>
<td>Examination, Comprehensive</td>
<td>20.00</td>
<td>0</td>
<td>25</td>
<td>25.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>2480</td>
<td>Health Certificate</td>
<td>6.00</td>
<td>0</td>
<td>25</td>
<td>7.50</td>
</tr>
<tr>
<td>Examinations</td>
<td>2412</td>
<td>Preoperative ECG - Fax</td>
<td>25.00</td>
<td>0</td>
<td>25</td>
<td>31.50</td>
</tr>
<tr>
<td>Examinations</td>
<td>2410</td>
<td>Recheck</td>
<td>18.00</td>
<td>0</td>
<td>25</td>
<td>20.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>OVG</td>
<td>Office Visit - Geriatric</td>
<td>20.00</td>
<td>0</td>
<td>25</td>
<td>25.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>OVA</td>
<td>Office Visit - Annual</td>
<td>35.00</td>
<td>0</td>
<td>25</td>
<td>44.00</td>
</tr>
<tr>
<td>Examinations</td>
<td>OVN</td>
<td>Office Visit - New Client</td>
<td>20.00</td>
<td>0</td>
<td>25</td>
<td>25.00</td>
</tr>
</tbody>
</table>

Additional columns can be displayed in the Markup Analysis window by setting the appropriate default Hospital Setup Advanced Option.

- From the CID select the **Hammer**, **Screwdriver** and **Wrench** speed bar icon.
- In the **search** field type **sales** and select the option **Show Sales Data By Default** and set the value to **True**.

The Markup Analysis window will now display the Fiscal Income Fiscal Sold, Projected Income, Income Difference and Income Difference Percent. The sales data amounts will be figured at the bottom of the analysis window.

- In the Markup Analysis window select **View, Show Sales Data** from the menu area to hide or display the 5 additional income columns.
In the Markup Analysis window you can customize the view by arranging columns and using the Show/Hide Group Panel options from the View menu.

**Save and Print Markup Values**

In the Analysis window you will have the ability to save the markup values to a .dat file and also open previously saved files.

- In the Markup Analysis window select **File, Open** from the menu to open a previously saved .dat file that contains markup pricing information.
- To save markup values currently displayed in the Analysis window select **File, Save As** from the menu area. Enter a file name, location and click Save.
- To print the markup analysis values select **File, Print** from the menu.

### Add a Treatment

The right half of the Treatment List Window displays the Treatment List for the category currently selected. Working in this window, you are able to add new treatments and/or specify information about each of the existing services you perform.

- Select the correct Treatment Category to add the treatment to.
- **Point** in the Treatment List Records for section. Right-click and from the shortcut menu click **New** to display the New Treatment window.
Chapter 3: The Treatment List

Treatment Tab Values

**Find**
Use the Find menu button to quickly locate a field.
- Click the **Find** button.
- From the drop-down list select the field you are searching for and click **OK**. AVImark will then place the cursor in the selected field.

**Code**
You may use up to 8 characters, either numbers, letters, (or a combination of both) for a treatment or Treatment Group. AVImark will not allow you to use the same Treatment Code for an inventory item, diagnoses or another treatment that has already been entered.
- Type a code for the treatment.

**Description**
This is the description that will appear on all Period reports and in the Medical History of those patients receiving the treatment.
- Type the description you wish to assign the treatment.

**Charge**
- Type the amount you wish to charge the client for this treatment.

**Action Codes**
Action Codes cause AVImark to perform certain functions including various add-on fees, patient sex codes, patient conditions, taxing, drug labels, and so on.
- If applicable, use the **Action Codes** drop-down list and select the appropriate Action codes.
The following table lists each Action Code and its meaning:

<table>
<thead>
<tr>
<th>Code</th>
<th>Meaning</th>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Automatic drug label prompt</td>
<td>Prompts the drug label window to display when the service is entered into medical history.</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>Automatic test result prompt</td>
<td>Prompts the additional data field window allowing you to enter the patient’s test results.</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>Controlled Substance</td>
<td>Marks this service as a controlled drug and includes it on the controlled substance report.</td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>Treatment causes death</td>
<td>Automatically marks the patient as deceased when the service is entered into medical history.</td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>Print one document/patient</td>
<td>Prompts a document for each patient that has received the same service in medical history for a client.</td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>Include on travel sheet</td>
<td>Includes this service on the travel sheet that can be printed through AVImark.</td>
<td></td>
</tr>
<tr>
<td>G</td>
<td>Treatment Group</td>
<td>Makes this service a parent treatment group allowing you to link components to this code.</td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>Handling fee</td>
<td>Includes the handling fee with the price of the service.</td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>Integer pricing</td>
<td>Rounds the price of a service that has a partial quantity to the price of the nearest whole number.</td>
<td></td>
</tr>
<tr>
<td>K</td>
<td>Prompt to include in group</td>
<td>When included within a treatment group this action code will prompt you if you would like to enter the service in medical history.</td>
<td></td>
</tr>
<tr>
<td>L</td>
<td>Subject to local sales tax</td>
<td>Includes the local/PST tax to the price of this service as defined in hospital setup.</td>
<td></td>
</tr>
<tr>
<td>M</td>
<td>Intramuscular injection fee</td>
<td>Includes the intramuscular fee to the price of this service as defined in hospital setup.</td>
<td></td>
</tr>
<tr>
<td>N</td>
<td>Don’t print on patient chart</td>
<td>Suppresses the printing this service on the patient’s printed chart.</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>Prescription fee</td>
<td>Includes the prescription fee to the price of this service as defined in hospital setup.</td>
<td></td>
</tr>
<tr>
<td>Q</td>
<td>Don’t post to invoice</td>
<td>Will not include this service on the printed invoice. This service will be entered in medical history and displayed as already posted.</td>
<td></td>
</tr>
<tr>
<td>R</td>
<td>Rabies vaccination</td>
<td>Indicates this service as a rabies vaccination. This action code will also prompt for the vaccine information window.</td>
<td></td>
</tr>
<tr>
<td>S</td>
<td>Subject to state sales tax</td>
<td>Includes the state/GST tax to the price of this service as defined in hospital setup.</td>
<td></td>
</tr>
<tr>
<td>T</td>
<td>Subject to state and local sales tax</td>
<td>Includes both state &amp; local/PST &amp; GST tax to the price of this service as defined in hospital setup.</td>
<td></td>
</tr>
<tr>
<td>U</td>
<td>Intravenous injection fee</td>
<td>Includes the intravenous fee to the price of this service as defined in hospital setup.</td>
<td></td>
</tr>
<tr>
<td>V</td>
<td>Vaccination</td>
<td>Indicates that this service is a vaccination, this will also include these services on the vaccs tab at the bottom of the CID screen.</td>
<td></td>
</tr>
<tr>
<td>W</td>
<td>Auto prompt for vital signs</td>
<td>Automatically prompts for the Medical Condition Record (SOAP) to display when this service is entered into medical history.</td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>Causes sex alteration</td>
<td>Automatically updates the patient’s sex to spayed, neutered or gelded depending on the previous sex and species of the patient.</td>
<td></td>
</tr>
<tr>
<td>Y</td>
<td>Assign certificate number</td>
<td>Automatically assigns a certificate number when this service is entered into the patient’s medical history.</td>
<td></td>
</tr>
<tr>
<td>Z</td>
<td>Dietary item</td>
<td>Includes this service on the dietary tab at the bottom of the CID screen.</td>
<td></td>
</tr>
<tr>
<td>+</td>
<td>Surcharge by item cost</td>
<td>Includes the cost of the linked item to the price of the parent service.</td>
<td></td>
</tr>
<tr>
<td>&amp;</td>
<td>Surcharge by item price</td>
<td>Includes the price of the linked item to the price of the parent service.</td>
<td></td>
</tr>
</tbody>
</table>
### Chapter 3: The Treatment List

<table>
<thead>
<tr>
<th>Action Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>)</td>
<td>Integer qty surcharge If a partial amount is used of a linked inventory item AVImark will round the quantity to the price of a whole amount and add it to the price of the service it is linked to.</td>
</tr>
<tr>
<td>$</td>
<td>Include price on chart This action code will include the price of the service on the printed patient chart.</td>
</tr>
<tr>
<td>-</td>
<td>Obsolete treatment Marks a service as obsolete and grays it out on the list. When trying to add this service to medical history you will be warned that it is an obsolete service.</td>
</tr>
<tr>
<td>@</td>
<td>Auto prompt for document Prompts to print the linked document. Without this action code AVImark will automatically print the liked document with the invoice.</td>
</tr>
<tr>
<td>#</td>
<td>Don’t print form/document Suppresses the printing of the linked form or document.</td>
</tr>
<tr>
<td>*</td>
<td>Auto prompt for notes When entered into medical history it will automatically prompt for a notes window to enter information about the service.</td>
</tr>
<tr>
<td>?</td>
<td>Schedule follow-up at posting This action code will display the follow-up window when posting instead of when the service is entered into medical history.</td>
</tr>
<tr>
<td>!</td>
<td>Show warning if quantity is equal to 1 This action code will display a warning if the service entered in medical history has a quantity equal to one.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Don’t print notes on chart Will not include the entered medical history notes on the printed patient chart.</td>
</tr>
<tr>
<td>(</td>
<td>Control refills Allows you to control refills on this service if a drug label is being printed.</td>
</tr>
<tr>
<td>=</td>
<td>Don’t use additional fees Does not allow the additional fees (intra-muscular, intravenous, prescription, etc) to be added to the price of the service.</td>
</tr>
<tr>
<td>%</td>
<td>Auto copy notes into medical history Copies entered notes on the treatment automatically into a notes window in medical history.</td>
</tr>
<tr>
<td>~</td>
<td>Auto hide notes in medical history Will not display the entered medical history notes on the CID screen.</td>
</tr>
<tr>
<td>[</td>
<td>Auto prompt for the microchip number Automatically prompts for the patient’s microchip number and will enter the number into the patient’s area of the CID screen.</td>
</tr>
<tr>
<td>{</td>
<td>Auto prompt for the locator number This action code will prompt for a number to be used with ePetRecords.</td>
</tr>
<tr>
<td>}</td>
<td>Don’t add to Whiteboard Will not include this service on the whiteboard automatically when entered into medical history.</td>
</tr>
<tr>
<td>1</td>
<td>Don’t post from Whiteboard When posting services from the whiteboard this action code will not post the service to medical history.</td>
</tr>
<tr>
<td>&lt;</td>
<td>Include on the E-Travel sheet Includes this service on the electronic travel sheet.</td>
</tr>
<tr>
<td>2</td>
<td>Show Notes in Medical History This action codes allows you to view specific notes with the option selected of “Show all with note action” in medical history.</td>
</tr>
<tr>
<td>3</td>
<td>Pet ID Card Treatment Prompts a Pet ID card, if accepted the prompts and exports the information to a file. If you would like to utilize this action code please contact the Pet ID department at 877-677-7384, option 6.</td>
</tr>
<tr>
<td>5</td>
<td>Dental Assessment Automatically prompts the dental chart to display when the service is entered into medical history.</td>
</tr>
</tbody>
</table>

**Report Codes**

Report codes are user-defined letter characters used for grouping performed treatments together on certain reports (Treatment Control Log, Patients by Treatment, Income by Treatment, Transaction Summary, and Sales Summary). You may use up to 3 codes for each treatment. There are some codes that are pre-programmed for use with the most common reports. They are:
• Lab services (L)
• Surgery (S)
• Injections (I)
• Prescriptions (P)
• Vaccinations (V)

**List Codes**
Any given treatment may be assigned up to 3 Work List codes. When you perform the treatment, the patient is automatically put on one or more Work Lists. These codes are defined in the Work Lists Table of System Tables. For more information on Work Lists codes, refer to “Error! Reference source not found.”

- If appropriate, use the **List Codes** drop-down list and select the appropriate Work Lists code(s).

**Cost**
The Cost of the treatment will be included on the Income by Treatment Report, Sales and Transaction Summary and the Transaction Journal. The Cost cannot be marked up and will not be included on any graphs.

- Type the cost for this treatment.

**Markup Percent**
A markup percentage can be added directly to the treatment that AVImark will use when a Markup is performed. This percentage will take precedence over the category markup percentage.

- Type the markup percentage for this treatment.

**Appointment Time**
The Appointment Time field is used to allot the number of minutes on the AVImark Appointment Calendar for an appointment for this treatment.

- If appropriate, use the UP and DOWN ARROWS and select the number of minutes you wish to allot for this treatment.

**Sex(es)**
You may restrict certain treatments to patients of a certain sex.

- If appropriate, use the **Sex(es)** drop-down list and select the appropriate Sex code(s).

**Discount Class**
AVImark uses the Discount Class field to determine which treatments are to be discounted to which client class. You may set up an unlimited number of client classes as well as treatment and inventory classes.

- If applicable, use the **Discount Class** drop-down list and select the appropriate discount class.

**Species 1 & Species 2**
You may specify up to 2 different species for the treatment. If you attempt to enter the treatment into Medical History of a patient whose species is other than what is selected here, the treatment will NOT be entered and you will receive a warning message.

- If appropriate, use the **Species** drop-down list and select the appropriate species limitation for the treatment.
Abbreviation
The Abbreviation field allows a shortened description of the treatment to be displayed when this
Treatment is included on the Whiteboard. This field will hold up to fifteen characters. This
description will only be used to display within the Whiteboard. When posted to the Medical History
from the Whiteboard, the normal description will be used.

- If appropriate, type a shortened description of the treatment.

Photo
AVImark lets you link any .bmp; .jpeg; or .tif image to the treatment to be printed on the client invoice
attached to the doctor’s instructions for the treatment. When this treatment is included on the client
invoice, this photo will be printed at the bottom half of the invoice along with take-home instructions.
However, if there are no take-home instructions linked with the treatment the photo will not be printed
on the invoice.

- If appropriate, use the Photo field browse button to open the folder of your saved photo files.

Invoice
AVImark allows you to specify an alternate name of the treatment that will be printed on the client
invoice, estimate, and/or statement.

- If necessary, type an alternate Name for the treatment.

Form
AVImark allows you to designate a default Microsoft Word form that is to be used for the treatment.

- If appropriate, use the Form field browse button to open the folder of your MS Word forms.

Doctor
AVImark allows you to specify a default doctor that will automatically be selected when you enter the
treatment in the Medical History area of the patient.

- If appropriate, use the drop-down list and select the default doctor for the treatment.

Journal
AVImark allows you to specify a default MS Journal file to be used for the treatment.

- If appropriate, use the Journal field browse button to open the folder of your MS Journal files.

Category
This field allows you to move treatments from one category to another.

- If appropriate, use the drop-down list and select the correct category.

Comments
AVImark allows you to enter Comments about the nature of the treatment and/or procedures involved
in performing it. In addition, you may select to have the Comments printed on the client invoice.

- If necessary, type the appropriate comments in the area provided.
- If you wish to have the comments printed on the client invoice, select Print comments on
  invoice.
**Doctor’s notes**

AVImark allows you to enter Doctor’s notes about the nature of this treatment and/or the procedures involved in performing it. By using the Percent (%) Action Code on the treatment, you can have the notes posted to the patient’s Medical History. These notes will not appear on the client invoice.

- If necessary, type the appropriate Doctor’s notes in the area provided.

**To learn more about:**
- Typing notes or comments
- Using merge words in your documents
- Using the Note Glossary

**Search the Help for:**
- Comments (select Treatments Tab); Doctors Notes
- Merge words
- Note Glossary

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*If you are adding a new treatment, you must click Done before you can continue setting up Attachments and other Treatment values.*

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**Work with Attachments**

If working with a new treatment you must click **Done** before working with the Attachments area. There are three major treatment Attachments – Doctor’s Instructions, Associated Treatments and Items, and More Stuff. These attachments will be added from the Change Treatment window.

- From your Treatment List, select the correct treatment.
- Right-click and from the shortcut menu click **Change** to display the Change Treatment window.

**Attachments: Add Doctor’s Instructions**

Take-home instructions can be attached to any treatment and printed automatically on the client invoice. When creating Doctor’s Instruction, you may use any AVImark note feature options. For detailed information on the AVImark note feature options, refer to “*Error! Reference source not found.*”.

- In the **Attachments** area of the Change Treatment window, click **Doctor’s Instructions** to display the Doctor’s Instructions Note window.

![Doctor’s Instructions for Gastroduodenal Endoscopy](image1)

- Type the appropriate take-home Doctor’s Instructions and click **Done**.
- These instructions can be viewed or modified from the Medical History area. Once the service has been entered select right-click **Instructions**.

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13
Attachments: Associate Treatments/Items

AVImark allows you to link or “associate” other treatments, inventory items, and/or diagnosis codes to any treatment. With this feature you may enter multiple treatments into the patient’s Medical History by setting up either a Treatment Group or Linked Treatments. You may also control inventory usage for any service by setting up Inventory Usage.

- In the Attachments area of the Change Treatment window, click Associated Treatments/Items to display the Associated Treatments and Items window.

If you have several treatments with similar Doctor’s Instructions, you may “duplicate” the instructions without having to retype them. Instead of typing the instructions, type the Treatment Code of the “parent” treatment enclosed in asterisk (*220*). When using tag-a-long instructions, ensure the first asterisk is at the left margin with no spaces.
Link Associated Inventory and Specify Usage

You may link any inventory with your treatments to relieve on-hand quantities whenever the treatment is entered into the Medical History of the patient. After the treatment has been entered into the patient’s Medical History and later posted to the client’s invoice, AVImark will update inventory on-hand quantities appropriately.

- On the Inventory Used window, right-click to see the shortcut menu. Point to **Choose** and click **Items** to display the Inventory list window.

- From the Inventory list, select the appropriate items by clicking on the item itself. This will place the item in the Selected Items area.
- If necessary, you may change the quantity usage of each item by clicking on the item additional times or by changing the quantity in the Selected Items area.
- Click **Done** to return to the Inventory Used window.
- To make a change to an item from the Inventory Used window, select the item that needs changed.
- Right-click and from the shortcut menu click **Change** to display the Change Associated Treatment or Item window.
- Make the appropriate changes and click **Done**.

**Allow override?**

AVImark gives you the ability to change the default inventory usage each time the treatment is performed. When you enter the treatment into the Medical History of a patient, AVImark will open the Inventory Used window on the CID and let you change the default quantities or items you previously assigned to the treatment.

- On the Associated Treatments and Items window, select **Allow override?** and click **Done**.
Chapter 3: The Treatment List

Print on invoice
AVImark allows you to print the inventory usage for the treatments performed on the client invoice.

- On the Associated Treatments and Items window, select **Print on invoice**.

Add an inventory usage surcharge
With certain Action codes for a treatment, you may add a surcharge to the price of the treatment. The surcharge amount will either be the Average Cost or the Retail Price of any inventory item used. This allows you to set a “base” price to the treatment to cover labor and other overhead plus a surcharge depending on how much inventory is used.

- To add the **Retail Price** of inventory used to the price of the treatment, specify the **Ampersand (&)** as one of the Action codes for the treatment.
- To add the **Average Cost** of inventory used to the price of the treatment, specify the **plus sign (+)** as one of the Action codes for the treatment.

Link Associated Treatments/Diagnosis/Problems
You may link associated treatments, diagnosis and/or problems with the selected treatment. Also called “Tag-a-long” treatments, these treatments, diagnosis or problems are entered into the Medical History of the patient at the time the original (parent) treatment is added. There is no built-in discounting capability with linked treatments as there is with Treatment Groups.

- On the Associated Treatments and Items window, select the **Linked Treatments** tab.

- On the Linked Treatments window, right-click to display the shortcut menu. Point to **Choose** and click **Treatments**, **Diagnosis** or **Problems** to display the appropriate list.
Chapter 3: The Treatment List

- Add treatments and/or diagnosis using the same procedures as discussed in the topic, “Attachments: Associate Treatments/Items on page 14”.

Create a Treatment Group

Treatment Groups serve two purposes. First they allow you to enter several treatments and items into the Medical History of the patient by entering only one code. Second, they allow discounts on the treatments and items included in the group. In addition, AVImark gives you the ability to link multiple groups together. One or more Treatment Groups can be linked to an “overall parent” Treatment Group which allows a single, combined group to be added to a patient’ Medical History. When several Treatment Groups are linked to a collective “parent group”, the individual prices of all group components will be prorated from the group price set for the parent group (if Use Normal prices is not selected.)

Your Treatment List may be better organized if you keep all of your Treatment Groups in a Treatment category called “Treatment Groups”. All Treatment Groups, wherever they are in your Treatment List, will be displayed in red. In addition, the Treatment Group description itself will not be recorded in the Medical History area, only the components of the group.

- Create a new treatment, preferably within the Treatment Groups category, and assign a Code and Description. For assistance in adding this treatment, refer to the topic, “Add a Treatment” on page 7.
- TAB to the Action Codes field and if not already there, select the G Action code.
- Click Done to add the new Treatment.

Add Treatment Group components

If adding a new treatment you must first save the treatment before working with the Associated Treatments/Items feature.

- In the Change Treatment window click the Associated Treatments/Items line option to display the Associated Treatments and Items, Group Components window.

- Add Treatments, inventory, and/or diagnosis using the same procedures as discussed in the topic, “Associated Treatments/Items” on page 14.
- To edit the quantity of each component, double-click on the component.
Include Tag-a-longs?
“Tag-a-long” treatments are formally Linked Treatments. You cannot add Linked Treatments to a Treatment Group. However, a treatment in your Group Components window may have Linked Treatments associated to it.

- If applicable, select Include Tag-a-longs? to allow any linked treatments that belong to any of the treatments within the Group Components window to be included in the Treatment Group.

Charge normal prices
Treatment Groups may be priced the same as or lower than the sum of the price of the components that make up the group.

- To charge normal prices for the components in the group, select Charge normal prices.
- To discount the prices of the Group Components, enter a price in the Change Treatment window that is lower than the total as indicated in the Group Components window. On the invoice, the components will be prorated to match the total group price.

To learn more about:
- Linking Treatments, Inventory, Diagnosis
- Link Inventory and Specify Usage
- Create Treatment Groups

Search the Help for:
- Associated Treatments
- Inventory Usage
- Treatment Groups

Attachments: Add More Stuff (Additional Data Fields)
AVImark allows you to define additional data fields for any treatment in your Treatment list to give you a formal way of recording certain medical-related data, lab data, physiological signs, or any other specific data for a particular treatment. For detailed instructions on how to set up Additional Data Fields, refer to “Error! Reference source not found.”.

Advanced Tab Values

Vaccine
The Vaccine field allows you to select a default vaccine for the treatment to be automatically chosen when the treatment is performed (typically rabies vaccinations). Vaccine codes are entered in the Vaccine Table of System Tables. For more information on setting up the Vaccine Table, refer to “Error! Reference source not found.”.

- If appropriate, use the drop-down list and select the correct vaccine for the treatment.

Remind as
In AVImark, reminding for treatments and inventory items is primarily controlled by Reminder Templates. “Remind as” allows you to use the reminder setup of another treatment.

- Enter up to 3 Treatment codes that you wish the patient to be reminded for when this treatment is performed. In this way, you do not need to set up a Reminder Template for this treatment.

Weight Surcharge
The Weight Surcharge percentage value allows you to cause the amount you charge for a treatment to increase depending on the normal weight you have specified for each species in the Species Table of System Tables and the weight of the patient you are currently treating.

- If applicable, use the Weight Surcharge field UP and DOWN ARROWS to specify a percentage.
Follow-up
The Follow-up field allows you to specify the values that will determine how patients receiving the selected treatment will be handled by the AVImark Follow-up function. For a detailed discussion on the AVImark Follow-up feature, refer to “CHAPTER 27: THE FOLLOW-UP LIST”.

- If appropriate, use the UP and DOWN ARROWS to specify the number of days, after which receiving the treatment, you want the patient to be included on the Follow-up list.

Follow-up Critical?
This option allows you to identify the follow-up to be of critical importance.

- If appropriate, select Follow-up Critical?.

Subject
The Subject field defaults to the Treatment description. You may assign a different subject or reason if you wish.

- If appropriate, assign a different subject or reason.

Company
Having the ability to assign company numbers to individual codes as well as entire categories allows detailed reporting by company to be much more accurate. This same number can be assigned to multiple items.

- If appropriate enter the desired company number for reporting purposes.

Contract Prices Tab Values
This tab allows contract prices to be defined for Treatments. Before contract prices can be defined, descriptions for the prices must be created. These descriptions can be created from either the Contract Prices Tab or from the Contract Pricing Table within System Tables. For detailed information on adding new Contract Pricing entries to System Tables, refer to “Error! Reference source not found.”.

- To create a new description from the Contract Prices window, right-click and from the shortcut menu click New to display the New Treatment Contract Price window.

- In the Description field, click the New button to display the New Contract Price Code Entry window.
• Type a single character code in the **Code** Field.
• Type the description for the new entry in the **Description** field and click **OK**.

### Documents Tab Values
AVImark allows you to associate a Microsoft Word document or Star Office document with a treatment. You can print this document at the time it is first entered into the Medical History of the patient or at the time the invoice is printed, depending on what Action Code you enter for the treatment.

• To enter the document name, right-click and from the shortcut menu click **New** to display the New Treatment Species Entry window.
• Use the **Species** drop-down list and select the appropriate species.
• Use the **Document** field browse button to open the folder of your MS Word Documents.
• Select the appropriate document and click **OK**.

By default, the document will print when the invoice is printed for the client. If you specify the **At sign (@)** Action Code for this treatment, AVImark will print the document at the time the service is entered into the Medical History area of the patient instead of when the invoice is printed.

### Whiteboard Tab Values
The Whiteboard tab of the Change Treatment window allows you to specify the applicable values that will be used in grouping patients and treatments together on the Whiteboard. For detailed information on the AVImark Whiteboard feature, refer to “Error! Reference source not found.”

**Whiteboard**
This field allows you to select the Whiteboard category you wish to assign to this specific treatment. These categories are set up in the Whiteboard Categories Table within System Tables.

• Use the drop-down list and select the appropriate Whiteboard category.

**Include Tag-a-longs on Whiteboard**
This option allows you to include tag-a-longs when adding a Treatment Group to the Whiteboard Schedule tab.

**Frequency**
This field holds the default value for the frequency (number of times this service is to be administered daily) when this code is added to Whiteboard.

• Use the UP and DOWN ARROWS to enter the default value for the Frequency.
• In the second field specify the frequency of **times per day** or **hour interval**.
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Laboratory Tab Values
From the Laboratory tab of the Change Treatment window information related to lab machines and this treatment will be defined.
- In the DICOM sub-tab is related information to a new interface with Sound Technologies and the ability to work with DICOM images in AVImark.
- The Instrument Types sub-tab displays which instrument was used to define result fields linked to the selected treatment.
- The Labs sub-tab contains information when the treatment is associated with the IDEXX VetLab Station. From this tab you will select right-click New and select the appropriate lab company in order to make an IVLS association with this treatment.

Use the Treatment List Shortcut Menu
Within the Treatment List window there are several other features found in the shortcut menu. Click the right mouse button (called right-click) to display the shortcut menu.

Add a duplicate treatment
AVImark lets you add a new treatment to your list that is a duplicate of one that you already have entered. This will be very useful if you are adding several treatments that have the same characteristics.

- From your Treatment List, select the treatment you wish to duplicate.
- Right-click and from the shortcut menu click Another to display a duplicate Change Treatment window.
- Enter a new Treatment Code for the duplicate treatment as well as any other necessary changes and click Done.

Select
You may choose treatments to be added to Medical History, Estimates, Whiteboard, Appointment Calendar and Treatment Groups.
- With the correct treatment selected right-click Select.
- The treatment will be displayed in the Selected window to the left.

Edit
Use the Edit menu to select treatments or to undo or redo changes to a treatment.

View
From the View shortcut menu you can Refresh the window, customize columns, view the Entry History for this treatment, Preview or Hide text associated with the treatment or you can choose how to sort the window. If you have customized the display by arranging and adding or removing columns you can print the display by using the Print option from the View menu.

Entry History
Use this option to view a history of changes made to the selected treatment.
- Select a treatment and choose right-click View, Entry History.
- View date and time change was made, logged in user who made the change and a description of the change that was made.
- Click Done to close the window.

Move treatments to another category
You may easily move one or more treatments from one category to another.
- With the correct treatment selected right-click and from the shortcut menu click Move.
- You will need to click Yes to confirm and click the Treatment Category name you wish to move the treatment to.
Print a treatment label
You may print labels similar to prescription labels for any treatment in the list. For a detailed discussion on printing labels, refer to “Error! Reference source not found.”.

- From the right-click shortcut menu, click Drug Label to display the AVImark® Drug Label window.
- Enter the appropriate information you wish to appear on the label and click Print.

Display and print graphs
For any given treatment, you may display one or more graphs showing production, profit, trends, and so on. You may display and print graphs using either AVImark’s Graphing feature or Excel. This option is selected in the Advanced area of Hospital Setup.

- From the right-click shortcut menu, point to Graph and click the graph you wish to display.

Instructions
You may attach take-home instructions to any treatment to be printed automatically on the client invoice.

- With the correct treatment selected, right-click from the shortcut menu and click Instructions to display the Doctor’s Instructions window.
- Type the take-home instructions. All the available AVImark note feature options are available from this window.
- Click Done to save the Doctor’s Instructions.

Markup
Use this option to mark up the selected treatment. To learn more about marking up treatments refer to “MARK UP TREATMENT PRICES” on page 4.

Price History
You are able to track the price history of your services. Anytime the price of a treatment is changed the Date, Time, User that made the change, Action of the change, and the Old and New prices will be stored for that code. The Action of the price change refers to whether the price was changed manually, or changed using the Mark up feature. This information can be printed using the print option in the top left hand corner of the Price History window.

- With the correct treatment selected, right-click and from the shortcut menu click Price history to display the Treatment Price History window.

Set up a treatment reminder
AVImark allows you to set up a Reminder Template for any treatment. For a detailed discussion on setting up Reminder Templates, refer to “CHAPTER 11: REMINDERS”.

- With the correct treatment selected right-click and from the shortcut menu click Reminder.
- You will need to click Yes to create one and display the Reminder Template.
- Specify the various conditions for the reminder and click Done.

View and print the Whogot list
The AVImark Whogot list is a sorted list of all patients and their owners that have received a specified treatment, inventory item, or diagnosis. Use the Whogot list to view, sort, print, or go to the CID of any patient receiving the chosen treatment, item or diagnosis in a specified number of months.

- With the appropriate treatment selected, right-click and from the shortcut menu click Whogot to display the Treated Patients window.
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If applicable, use the Criteria menu to sort and/or limit the number of patients selected.

Click Done to return to the Treated Patients window.

Select the individual patients from the list you wish to print by clicking on the patient name and press the SPACEBAR.

Click Print to display the Print Whogot window.

- Use the Print to drop-down list and select the correct Printer.
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• Using the Months to show field, enter the number of months to display or use the drop-down calendar to specify the period you wish to print for.
• If applicable, double-click in the Document field to select a Document from among your MS Word documents.
• Select Include notes to include the notes about the treatment performed for each patient on the list.
• To omit the prescription messages, check the Exclude scripts checkbox.
• If applicable, click on Restrict to last query to limit the printing of documents to only those patients chosen when you ran the last information search.
• Click Print or to preview the report onscreen select Preview and click Print.

Undelete a deleted treatment
AVImark gives you the ability to undelete any treatments that may have been deleted.

• In the Treatment list window, right-click and from the shortcut menu click Undelete to display the Undelete Treatments window.
• If applicable, select the Undelete to a Lost and Found category to place the revived treatments in a category named L & F with the date and time they were revived.
• Click on the treatment you wish to undelete. Use the SPACEBAR or right-click and from the shortcut menu click Select. The treatment will appear bolded when selected.
• After all treatments have been selected, click Undelete.

Print the Treatment List

• On the Treatment List window, open the Print menu. Point to Reports and click Treatment List to display the Print Treatment List window.
• Use the Category drop-down list and select the individual category to print or select All Categories.
• To include linked inventory and treatments as well as take-home instructions on the report, select the Print details option.
• To print a 13-month production report with usage and sales totals, select the Production totals option.

Sort the Treatment List report
By default, AVImark will sort the treatments within each category by Code, Price or Description. If the “Category” box is unchecked, AVImark will simply print all treatments in the order in which selected.

Print a Travel Sheet
The Travel Sheet is a customized list of commonly used treatments that you use during the visit with the patient. By default, only those treatments with the “F” Action code will be included on the Travel Sheet.

• On the Treatment List window, open the Print menu. Point to Reports and click Travel sheet to display the Print Travel sheet window.