Reminders Administrator Guide

Patient Reminders are live in Version 1.6. This document is a guide on the features in the system, and how to set them up to automatically be added based on catalog items and products on bills.

As this document is intended for administrators and unit leaders, we have created a separate document for students, clinicians and staff called the Reminders Cheat Sheet.

Table of Contents

Contents

Reminder Card Setup

Before any reminders can be associated with patients, each hospital medical records administrator or unit leaders will need to create templates, assign privileges to roles, and define the permissible types of contact methods for the various templates.

A template type is a "family" of different reminders and is used in the background to link together different reminders for similar products or appointments automatically. For example, we recommend having a template type for annual vaccines, for recheck appointments, and for internal usage only. Your individual reminder needs can be tailored to your hospital's previous reminder usage or workflow.

Found under Navigation> Reminder Setup if you have the Access Reminder Setup privilege. (See Reminder Privileges.)

	Reminder Setup	Template Setup	Communication Type Setup				

Reminder Name: _____   ○ Any ○ Active ○ Inactive Templates
Product: [Line] [Seq] [Description] ▼   Species: _____ ▼
Catalog Item: _____   [Search]

Patient Reminders List

➕ Add New Template   ✖ Delete Selected Reminders

|	Reminder Name	Reminder Card Text (Client Visible)	Template Name	Default Reminder Length	Last Modified	Last Modified By
☐	5702-0201-211	5702-0201-211	Annual Vaccinations	1 Year	Feb 5, 2018	JMVANCE
☐	7077-0206-951	7077-0206-951	Annual Vaccinations	1 Year	Feb 6, 2018	JMVANCE
☐	Andrew's Yearly Checkup	Yearly Checkup Reminder	Annual Vaccinations	1 Year	Jan 30, 2018	AHANNEM9

There are three tabs to control the reminder cards: Reminder Setup, Template Setup, and Communication Setup. Each of these tabs is individually controlled by a separate privilege. We recommend reserving the Template Setup and Communication Type Setup tabs for your highest-level administrators but allowing unit leaders or client coordinators access to the first tab (Reminder Setup) to customize the reminders as necessary for their own units.

Working backwards, you can customize the reminders exactly as you wish them to be generated and used.

Feature	Type	Function
Reminder Setup	Tab	Contains the features to build the actual reminder cards that will be added to patients
Template Setup	Tab	Contains the features to build the base template types for reminder cards. E.g. Product based reminders, Follow Up Appointment reminders, etc.
Communication Type Setup	Tab	Contains the features to customize the available communication types for your cards. If your school wants to support text messages, for example, you can add them here.

Communication Type Setup

This is the tab where you can customize the communication types your hospital and clinics will have available. VetView will include Call Back, Email, and Post Cards as the base types during your initial migration, but you can add additional types as well, such as text messages, Twitter, Facebook messages, etc. Reminder communications can be adjusted on each different template type, so if you want to have a Recheck Callback template and a Recheck Email template, you can separate them out as two different types of reminder.
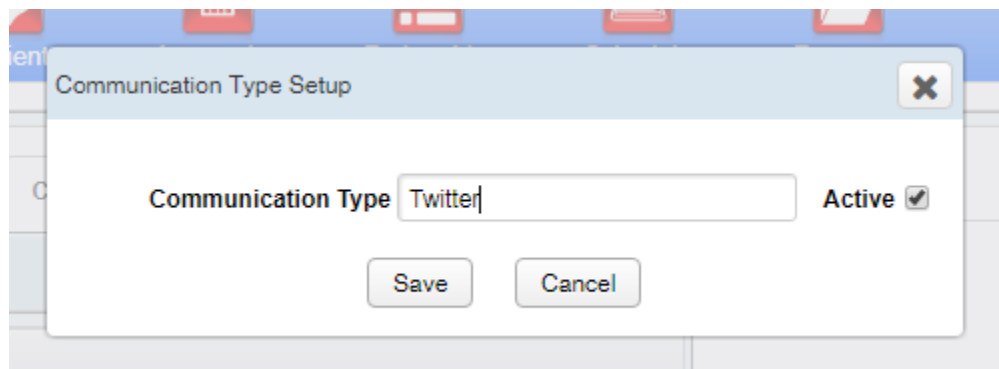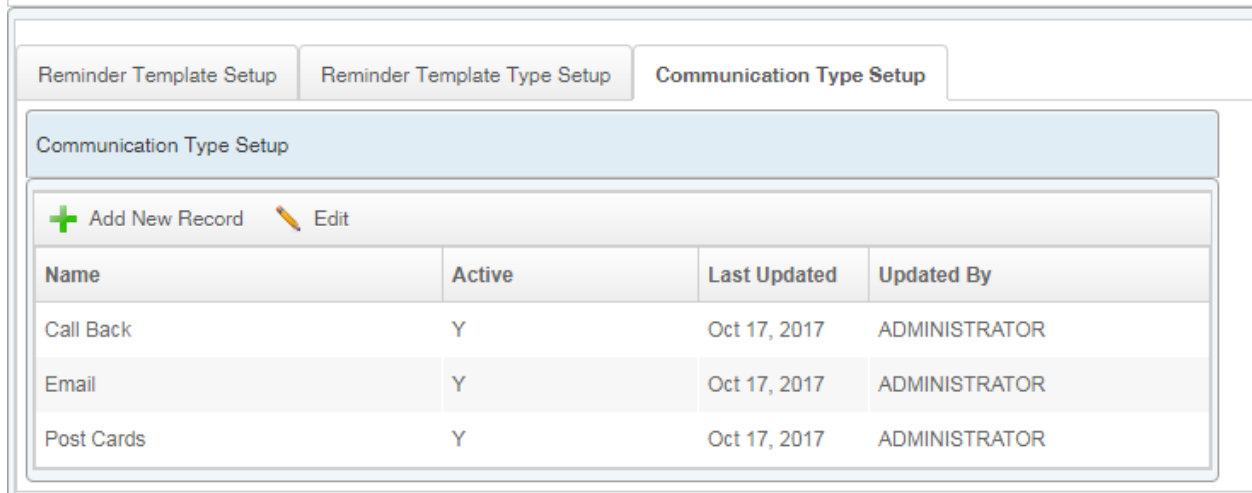
Feature	Type	Function
Add New Record	Button	Opens up the Communication Type Setup window
Edit	Button	Edits a selected Communication Type
Name	Column	Displays the name of the communication type
Active	Column	Indicates whether this communication type is active or not. Communication types cannot be deleted.
Last Updated	Column	The date this record was last modified
Updated By	Column	The last user to update or save this communication type
Communication Type	Text field	The name of the new communication that you want displayed
Active Flag	Checkbox	Indicates whether this communication type should be active or not. Defaults to on for new communication types.
Save	Button	Saves this communication type
Cancel	Button	Cancels out of the new Communication Type window

Reminder Template Type Setup

The Template Types are designed for you to set some commonly used parameters (global variables) for different types of cards. The system was designed to be flexible enough to use for reminders as close together as 1 week, or as delayed as 1 year. You can build reminder types for each unit of your hospital if you want, tailoring the message. Or you can create a more universal type, such as a generic Wellness Checkup, that can be used for multiple units.

The system is also built to be used for internal reminders that don't go out to clients, so you can attach an internal reminder to a product on the bill, like lab requests, to remind the staff to check for lab results in a few days.

Reminder Templates are also how "families" of reminders are linked together. VetView will automatically combine reminders for different products into a single reminder notice, if they are within the combination tolerance for that card, and they share the same template family. For example, you may have three or four different vaccines associated with an Annual Vaccination template. If an animal has one vaccine done then has an adverse reaction and has to wait a day or two for the others, causing a spread of several days, VetView will detect that the vaccines are from the same template type, and merge them together for next year's annual vaccine reminder.

There are two windows on this tab: One for the existing templates, and one to set the variables for a new record or to edit the existing variables.

Feature	Type	Function
Reminder Template Type List	Window	Contains a list of the existing Reminder Template Types. Select one to edit it.
Reminder Template Type Setup	Window	Contains the parameters for a new or existing Reminder Template Type.

Reminder Template Type List

+ Add New Record

Name	Active	Last Updated	Updated By
Annual or Wellness Reminder	Y	Oct 20, 2017	JDUKE
Cardiology Recheck	Y	Oct 20, 2017	JDUKE

Feature	Type	Function
Add New Record	Button	Opens up a new Reminder Template Type Setup window to allow you to enter in new parameters
Name	Column	The name of the existing Reminder Template Types
Active	Column	Displays whether the Reminder Template Type is active or not
Last Updated	Column	The date this template type was last updated
Updated By	Column	The last user to update this reminder template type

Reminder Template Type Setup

Click on Add New to create a new template. Click on an existing template to edit the parameters.

Each template requires a name, a combination tolerance (e.g. 2-3 days for shorter term reminders, or up to 1 month for annual visits without a hard deadline such as dental COHATs), the permitted communication methods, an email return address (to separate out reminder replies to their own inbox – talk to your school's IT services to set up a unique email address for reminders if desired), the email subject line that will appear, and an email or post card body.

Reminder Template Type Setup

Reminder Type Name: [_____] ☐ Active

☐ Default To Internal Reminder

Combine Reminders within: [0] [____] [▼] ☐ Auto Combine

Auto Send: ☐ [0] [____] [▼] before Due Date

Communication Method: [_____]

Email Return Address: [_____]

Email Subject: [_____]

Template Message Body:

Save   Cancel   Preview

Feature	Type	Function
Reminder Type Name	Text Field	The place to enter the name that this card type will be identified by. Use a unique, descriptive name. Include a specific unit if desired.
Active	Checkbox	Indicates whether this reminder template type is active or not
Default to Internal Reminder	Checkbox	Indicates that this reminder type template should load with the Internal flag turned on by default. Use this for messages intended for staff members as opposed to clients.
Combine Reminders Within	Text Field. Drop Down	Allows you to put in a date range for reminders that should be bundled together within a specified time frame. Although this allows for the flexibility from days to years, for most reminder types we strongly suggest using a short time frame, such as a few days or less than a week.
Auto Combine	Checkbox	Indicates that these reminder types will automatically merge together on the patient record
Auto Send	Checkbox	Indicates that this reminder type should bypass the comm worklist and go out without being reviewed. Recommended for long term reminders, such as wellness visits.
Before Due Date	Text field, drop down	Indicates how many days this reminder should automatically send before the due date, to allow the client time to schedule the appointment (e.g. 1 month for wellness visits, 1 week for follow ups, etc.) Not recommended for internal reminders.
Communication Method	Drop Down	Pulls the communication methods from the setup tab and allows the user to pick which method will be used for this reminder type.
Email Return Address	Text Field	The email address that will appear to the client as the "sender" – this allows each unit to have a unique email address for replies from clients, if you wish to allow for scheduling appointments by email
Email Subject	Text Field	The subject line that will appear on this email template
Text Message Boxy	Rich Text Field	The body of the email that will be sent out. Reminders will have specific comments associated with individual products as well, but this allows you to customize the email with letterhead or other images.
Macro Text	Button	Opens the Macro window, which contains a list of supported "placeholder" items that can be used in the Email Subject and the Text Message Body.

These include Patient Name, Client Name, reminder date, and others. |
Save	Button	Saves changes to this reminder template type
Cancel	Button	Cancels changes to this reminder template type
Preview	Button	Opens up a brief preview of the template text, including any images or formatting that was added

Reminder Template Setup

This tab contains a search box at the top (with the understanding that over time you may build up a large collection of reminders if you allow each unit to build out their own) and a list of results in a separate window below.

Double click an existing reminder to edit it or select it if you wish to delete it. If a reminder has been used at any time on a patient record, it cannot be deleted, but you can set it to inactive to prevent future usage. You will receive a warning prompt that says it was used and thus cannot be deleted. Reminders that have never been used can be safely deleted, and you will not receive a warning if they are unused.

Feature	Type	Function
Reminder Name	Text Field	Place to enter a search string when looking for a specific existing reminder template. For example, "rab" will bring up any reminder templates that have "Rabies" in them
Product Search	Lin Seq Desc	Search for any reminders associated with specific products
Any	Radio Button	Searches for any reminders, active or inactive
Active	Radio Button	Limits search to only active templates
Inactive Templates	Radio Button	Limits search to only inactive templates
Catalog Item	Text field	Searches for reminder templates associated with specific catalog items
Species	Drop down	Filters search results based on the specifies filters of each reminder template
Search	Button	Searches for results based on the selected parameters
Patient Reminders List	Window	Contains the list of search results
Add New Template	Button	Goes to the Patient Reminder Setup screen
Delete Selected Reminders	Button	Deletes reminders from the system and marks them as inactive. Deleted reminders will no longer be available when a user adds a product or a catalog item to the bill
(Checkboxes)	Unnamed Column	The checkboxes to select reminders for deletion. Reminders are edited by clicking on the blue link, or by double clicking the row.
Reminder Name	Column	The name of the reminder in the results list
Reminder Card Text (Client Visible)	Column	The name of the reminder as it appears on the communication to the client. This should be more general than the product name or internal name.
Template Name	Column	The name of the Template Type that was used to build this Reminder Template
Default Reminder Length	Column	The amount of time that will lapse between reminders
Last Modified	Column	The date that the reminder template was last modified
Last Modified By	Column	The name of the user who modified this reminder last

Clicking on Add New or double clicking an existing Reminder will open up the Patient Reminder Setup page. This allows you to set up the exact triggers for a reminder, the text associated with the catalog or product that the client will see, the length of the reminder, and also any units that should appear as the default (in case your Cardiology unit is scheduling a rabies reminder, for example, so that the Wellness clinic will override the user's default unit.)

Trigger items will not appear until you have clicked Save at least once.

Feature	Type	Function
Patient Reminder Setup	Window	Contains the basic parameters for the Reminder template
Products that trigger the reminder when placed on a bill	Window	Contains a list of products associated with this reminder
Products that satisfy the reminder when placed on a bill	Window	Contains a list of products that will satisfy this reminder (mark it as "fulfilled" or "customer response" in the system, for reports)
Filter by Species	Window	Contains a list of species associated with this reminder template
Catalog items that trigger this reminder	Window	Contains a list of the catalog items that, when added to a patient record, will automatically add this reminder to the patient

Patient Reminder Setup

These are the general parameters for this Reminder Template. Combined with the settings on the Reminder Template Type, they describe how this reminder card will appear on the patient record, and what the client will see for the products associated. By combining multiple products and catalog items into a single reminder, you can avoid duplicate reminders from being generated. The Template Type will also combine any reminders for templates that are generated using the same template type, as long as they are within the established combination window, further preventing duplicate reminders from being generated for similar reminders.

Feature	Type	Function
Back to Search	Button	Returns to the previously generated search results
Save	Button	Saves the changes to this reminder template, or creates a new one if it did not exist before
Reminder Name	Text Field	Place to enter the name of this Reminder. This is the name that will appear on the patient record and Reminder Card worklist
Formatting Template	Drop down	Choose from the Template Type that was set up on the Reminder Card Template Type tab.
Reminder Card Text	Text field	The name of the reminder card as it will appear to the client
Default Comment	Text field	The comment that will be added by default to this product. On all cards, the products will be listed, and comments will appear next to them. For example, a surgery reminder could include a note to have the patient fast for 8 hours prior to surgery.
Default Reminder Length	Integer field and unit of time	How far out this reminder should be due from the time it is generated. E.g. add a rabies shot to the order today, send out a reminder in 360 days or 1 year
Recurrence	Integer field	How many times this reminder should repeat before expiring. 0 means that the reminder will only be sent one time, and will not repeat. Use this for a series of booster shots, or for regular appointments.
Unit Override	Drop Down	If this reminder should always be associated with a specific unit, regardless of which unit is seeing the patient when it is added, it can be included here. For example, Cardiology Template Types should always be associated with the Cardiology unit.

Products that trigger this reminder when placed on a bill

This is the list of products that will generate this reminder when they are added to a bill. You can add additional products by clicking on Add Product. The Default Add means that the reminder is assumed to be "on" the moment the item is added to the bill.

Reminders can be turned on and off directly from the Order page, as products are added and removed to the bill. If Default Add is set to Off, then a student or technician will need to manually confirm that the reminder should be on for this product at the time of billing. The default due date will load based on the reminder settings, but it can be adjusted directly from the bill as well.

For the most common reminders, it is safe to set this to on. For reminders that will only occasionally be utilized or for which the date is not firm, this may be better set to off.

Feature	Type	Function
Add Product	Button	Opens up the Attach Another Product window
Select	Column	Contains a red X to delete this product
Edit	Button	Opens an existing line in the Add/Edit button. Allows you to toggle on whether this product is default or
Product	Column	The product lin seq and description. Click on the blue text to open up the Product Info in the Inventory
Default Add	Column	Contains checkboxes to indicate whether this product should default to this reminder text when it is placed on a bill
Attach Another Product	Window	Contains the fields to attach another product to this Reminder
Product	Line Seq Desc	Look up boxes for products in the system
Make Default	Checkbox	This is the product that will be default on the reminder when selected. This can be changed when the reminder is triggered on the Patient Record or the Order page
Add Item to Template	Button	Adds this product to the reminder template
Cancel	Button	Closes this window without adding the product to the list

Products that satisfy this reminder when placed on a bill

These products will mark a reminder as "Fulfilled" in the system. Reminders can also be manually marked as fulfilled (on the Reminders Worklist) or from the patient record during an episode.

Satisfied/fulfilled in this case indicates that the client has *responded* to the reminder and marks it in the system accordingly. Reminders will repeat or regenerate under a separate mechanism.

This information can then be used to generate a report for determining which method of contact generates the best response, response rates per unit, etc.
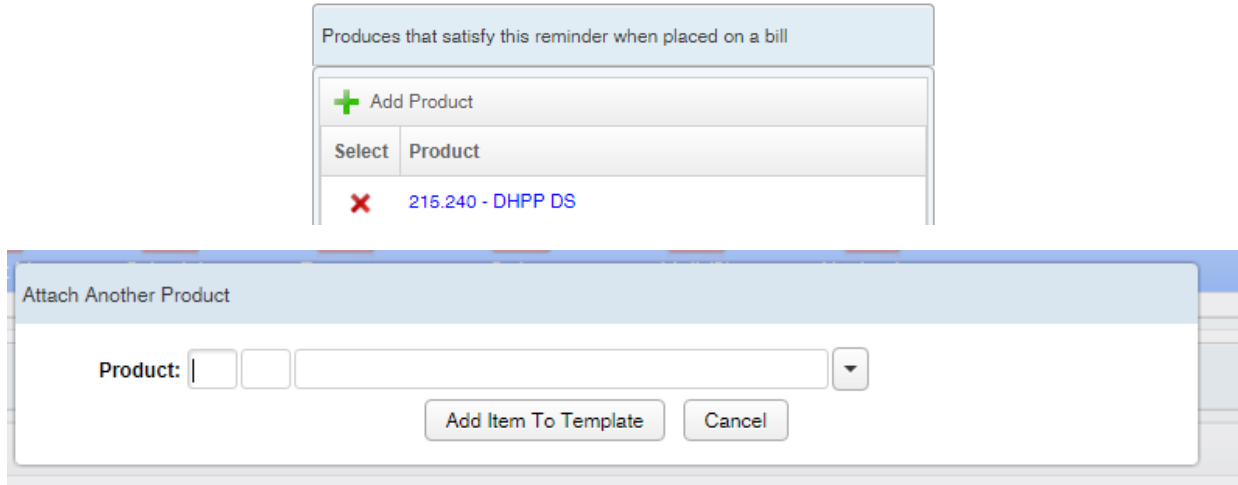
Feature	Type	Function
Add Product	Button	Opens the Attach Another Product window
Select	Column	Contains a red X to remove this product from the Reminder Template
Attach Another Product	Window	Opens when you click Add Product
Product	Lin Seq Description (search)	Standard VetView Product search
Add Item to Template	Button	Adds the selected item to the template
Cancel	Button	Cancels without adding any products

Filter by Species

The species filter allows you to narrow the reminder cards down to only certain species, so that they don't get automatically added when products or catalog items are shared between species. For example, you can make a reminder for an Equine Dental Exam only available to equine patients. If no species are added, the reminder is available for all species.

When a species filter is applied to a reminder, the reminder can only be added to the patient record or via the bill if there is a match between the patient's species and the reminder species. For all other patients, the reminder will be inaccessible and hidden, and will not auto-add to the bill even if the product is added.
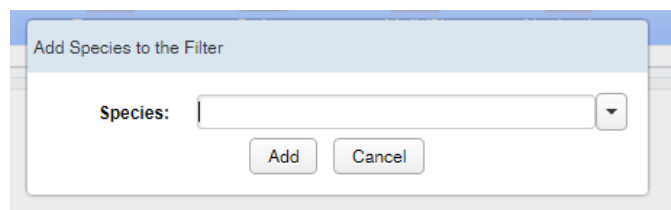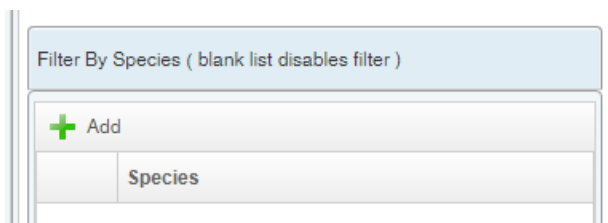
Feature	Type	Function
Add	Button	Opens the Add Species to Filter window
Species	Drop Down Search Box	Allows you to add a species to this reminder template
Add/Cancel	Buttons	Standard buttons to save changes or cancel without saving
(Red X)	Button	Removes this species filter from the list

Catalog Items that trigger this Reminder

In addition to products or services from the Inventory list, you can associate reminders with a catalog item that is added to the patient record. This way, if there is no specific billable item (for example, if you're completing a pre-paid visit), then the reminder can be generated off the report instead.

For example, have a surgery follow up reminder generated off a surgery report.

Feature	Type	Function
Add	Button	Opens up the Attach Another Product window
Catalog Item	Column	A list of all the catalog items associated with this reminder template
Default Add	Column	Indicates that this is the product that should have its text appear as the default when there are multiple products associated with this reminder
Catalog Item	Drop Down Search	The look up box for all catalog items in the system
Make Default	Checkbox	Indicates whether this should be the default text
Add Item to Template	Button	Attach this catalog item to the template
Cancel	Button	Cancel without attaching anything

Mass Generate Reminders

(Known as "Recreate Reminders" in UVIS)

This tool allows you to generate reminders for the product you have selected based on historical data. The system will look for that product added to any orders and create a reminder on the patient record based on the date the order was closed and the rules defined in the template.
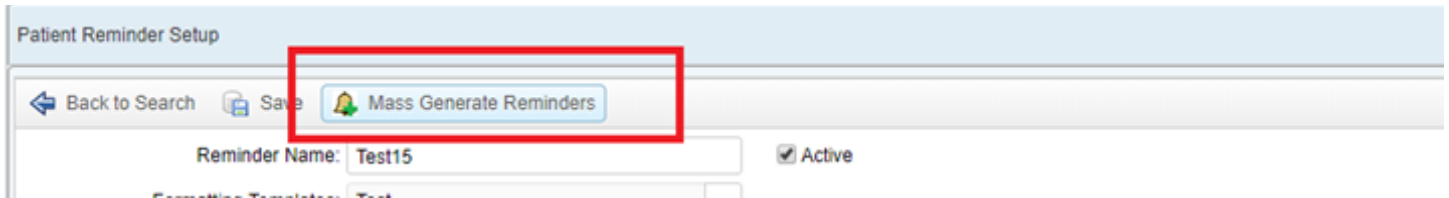
To narrow the range in which these reminders are generated, you can restrict it based on the Order Closed date. (No need to make reminders for Orders closed over a year ago!)

You can also limit it based on species, e.g. you want to only Mass Generate Reminders for your canine patients, and you will create the reminders going forward for your feline patients.
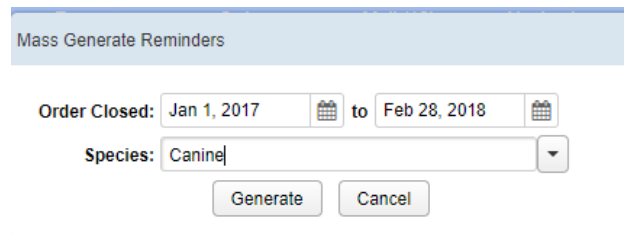
A confirmation message appears at the end letting you know how many reminders were generated based on your selected parameters.
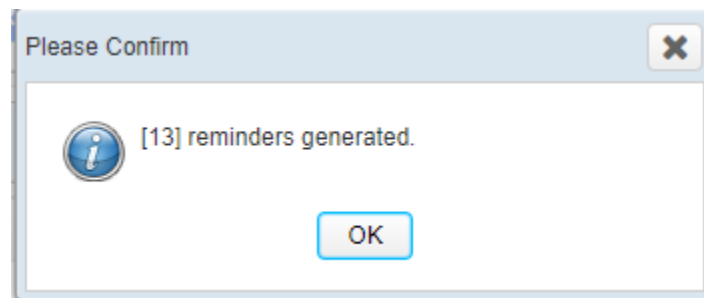
After this, the reminders will appear on the patient record and the worklist as normal.

Feature	Type	Function
Mass Generate Reminders	Button	Opens the mass generate reminders window
Order Closed	Date Pickers	Allows you to select a date range on which the order was closed for the reminders. Patient records with open orders will have the reminders added automatically through the Order method instead.
Species	Drop down	Allows you to only mass generate reminders for certain species, if you want to create reminders for canines but not felines, etc.
Generate	Button	Processes the orders for the selected items, order closed dates, and species
Cancel	Button	Closes the window without processing the reminders
Please Confirm	Window	Displays a success message of how many reminders were created based on the selected criteria

Reminders on Catalog Setup

Reminders on Digital Documents and Catalogs can also be controlled from the Catalog Setup page.

Reminders are associated with all documents at the Catalog level. However, you can also add a Digital Document element for the reminders, to more precisely control the placement of the Reminders within the Digital Document. If a reminder is added at the Catalog level, but not added as an element to a Digital Document within the catalog, it will appear at the bottom of the Catalog item.

First, define the Reminder you wish to automatically associate with the Catalog items (documents or request) at the Catalog Item level. This defines what reminders will automatically add when this Catalog Item is dropped on a patient record.

Linked Reminder Cards at the Catalog Level

From the Catalog Item Setup screen, click on the "Add" button on Linked Reminder Cards to associate all catalog items in this catalog with a specific reminder. If the reminder will be optional, have the Auto Add set to no, which will allow the person completing the catalog item to turn it on manually if desired.
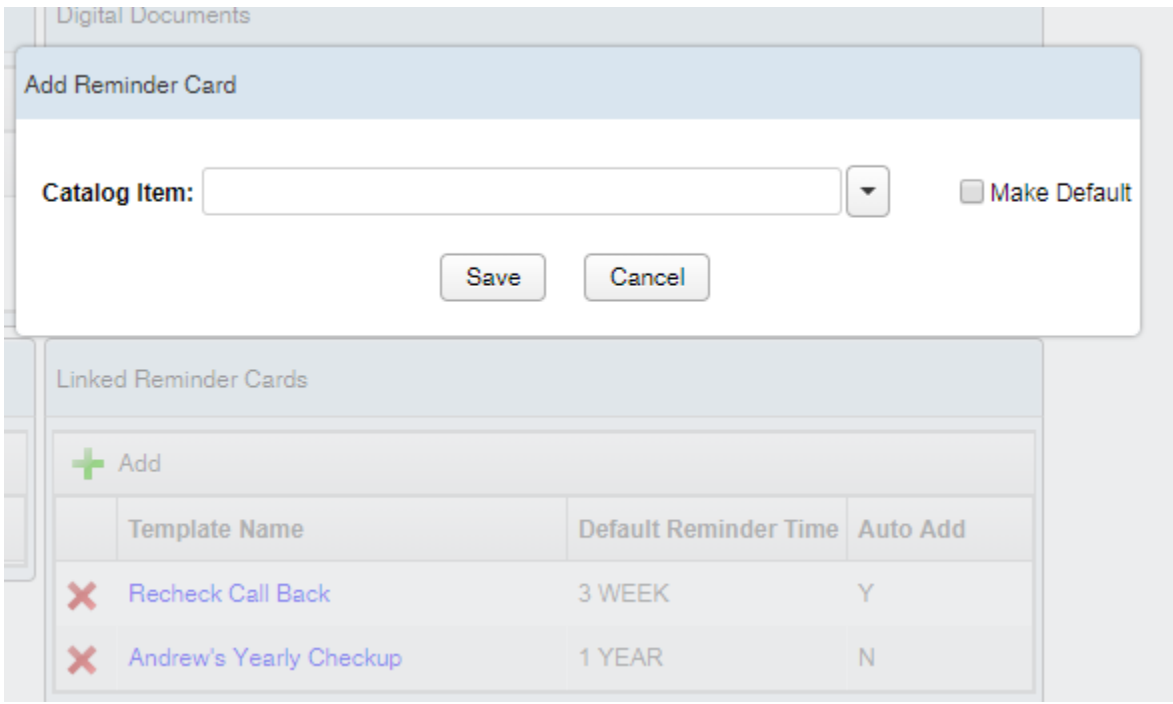
These catalog items will appear on the document in the patient record at the bottom of the document by default.

To adjust where the Reminder appears on the document, you can insert a Document Element of type Reminder.

Feature	Type	Function
Linked Reminder Cards	Window	Lists any reminder cards that are linked to this catalog item
Add	Button	Opens the window to find an existing reminder and link it
(Red X)	Button	Deletes this link
Template Name	Text Link	Opens the Reminder setup in the Reminder Setup page
Default Reminder Time	Text	The amount of time for which the reminder is due by default
Auto Add	Yes/No	Whether or not the reminder is set to be turned on by default when the catalog item is added to the patient record

Reminders Document Element

Under Digital Document Elements, create a new element of type Reminder. Name this something you can easily remember. This only needs to be created once, and can be used across all documents, since it will pull in the reminders defined at the catalog level.

Click on Add Element. Fill in the Element Name, the Description, and choose the Element Type of Reminder. Click on Save.

The Reminder digital document element can now be added to any existing document items.

Feature	Type	Function
Element Type	Reminder	Crates a basic digital document for the type of Reminder, which can then be added to any digital document

Add the Reminder Element to a Digital Document

Under Digital Document Setup, click on Add Document Element. Chose the Reminder element that you created on Digital Document Elements.

Use the Up and Down buttons to change where the Reminder will appear in the document. If the reminder will be the most important thing for a certain type of document, you can place it right at the top (e.g. a series of behavior classes, or a regular recheck for a renal patient.)

Digital Documents without a Reminder element will still display any Catalog reminders, but they'll just show up at the bottom of the document instead.

Feature	Type	Function
Reminder Document Element	Document Element	Allows you to add an element to a document for Reminders, shifting the position from the default bottom of the document to anywhere else within the document. The element does not change the contest of the reminder, which are defined at the catalog level.

Reminders on Patient Records

Reminders on the patient record are intended to be interactive, not simply passive notices. You can add new reminders, modify then, delete them, and mark them as fulfilled. You can also view reminders that had been previously fulfilled on the Reminders tab.

Visit Information – Reminders Medical Record Group
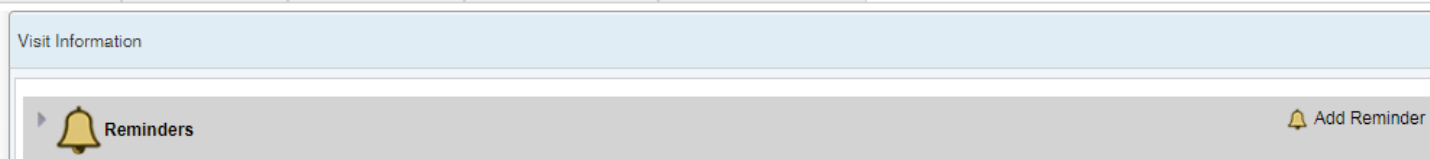
The Reminders group is a permanent medical record group that appears at the top of the Visit Information tab for every patient, similar to patient alerts.   The "Add Reminder" function is available on mouse over in the corner of the screen.

Add Reminder

Click on Add Reminder to open up the Add Reminder Card section.

The form for this is intended to be simple. You can choose the type of cards from the list of templates, the due date (which populates by default based on the template but can be modified), the unit associated with the reminder (which will default if that is set at the template level), and add a comment that will appear on the reminder in addition to the comment text built into the template. Once you have entered the information, click on the green checkmark to add it to the patient's record.

After that, the reminder appears at the top of the patient's record, until it is replaced, fulfilled, or the due date passes.

Feature	Type	Function
Reminders	Medical Record Group	Contains all the reminders for the patient, and the features to add and remove a reminder
Add Reminder	Button	Opens up the fields to enter in a new reminder for the patient
Type	Drop Down Selector	Contains a list of all the Reminders available for this patient, based on species
Due Date	Date Picker	The date that this reminder is due. Defaults to a date a certain number of days, months, or years out, depending on the template settings
Unit	Drop down selector	The unit this reminder will be associated with. Defaults to any units set on the template, or to the user's unit if no template was chosen
Comment	Text Field	A comment that will be added to the reminder. Use this to include any information the client or your unit coordinator will need to tell the client, such as fasting prior to a blood recheck
(Check mark)	Button	Adds this reminder to the patient record
(Cancel)	Button	Cancels this reminder and returns to the Reminders group without adding

Once the reminder has been added to the patient record, several other functions become available.   These are accessible from the buttons at the top, or from a right click context menu.

You can open up the card view as it will appear on the Reminder Worklist and edit internal comments, schedule an appointment (if the user has unit scheduling rights), add another reminder of the same *template type* to this card (e.g. any additional annual shots can be included on an annual visit, but not products associated with a different template type), edit the comments on this reminder, and remove the reminder completely.

Feature	Type	Function
View Reminder	Button	Opens up details of the reminder for further processing. This requires an elevated privilege.
Schedule	Button	Goes to your unit's Schedule page, on the reminder due date, to allow you to schedule an appointment on that date. The patient and client information will automatically import when the schedule is opened in this manner, and the system will create a pre-admission for you. This requires an elevated privilege.
Add Another Product	Button	Opens the dialogue box to add another product to this reminder card. Reminders of the same template type will automatically combine, i.e. vaccines will merge together.
Edit Reminder	Button	Opens up the original reminder parameters so that you may edit it, such as changing the unit or due date. This requires an elevated privilege.
Remove	Button	Removes this reminder entirely from the patient record. This requires an elevated privilege.

Clicking on the green plus sign opens up a limited number of fields to add an additional product to this reminder. Products are limited to the items on the same *reminder template type* on the setup page. The unit and due date will be the same for all products added in this same reminder. If you click on Add Reminder (the bell button) as opposed to Add Another Product, then the reminder will not have these restrictions. Reminders of the *same type* with due dates within the tolerance levels will automatically combine on the patient record.

Click on the green check mark to complete the process.

Feature	Type	Function
Product List	Drop down selector	List of products associated with this template type that can be added on the same reminder
Comment	Text field	Area to add a comment about the new product
(Check mark)	Button	Adds this product to the existing reminder
(Cancel)	Button	Does not save changes, and no product is added to the reminder

Add Another Reminder

When a second reminder is added to the patient record of a different unit and due date, the reminder products are not combined and the reminders themselves appear as two different entries in the patient record.

Edit Reminder

Because the reminder products can be added and removed individually, editing the reminder only allows you to change the unit and the due date. However, the entire reminder can be removed by clicking on the red X.
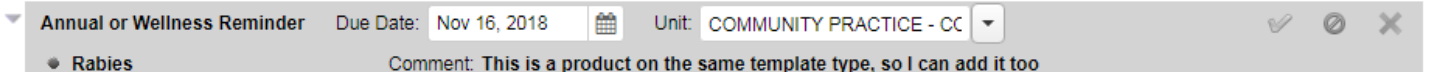
Feature	Type	Function
Due Date	Date Picker	Change the due date on this reminder
Unit	Drop Down	Change the unit associated with this reminder
(Check Mark)	Button	Save changes
(Cancel)	Button	Close without saving
(Remove)	Button	Remove this reminder entirely from the patient record

View Reminder Details

View Reminder Details can be accessed from the header, or from the right click context menu. This feature allows you to directly manipulate the data behind the reminder, from the patient record. View Reminder Details is locked behind the "View Reminder" privilege.
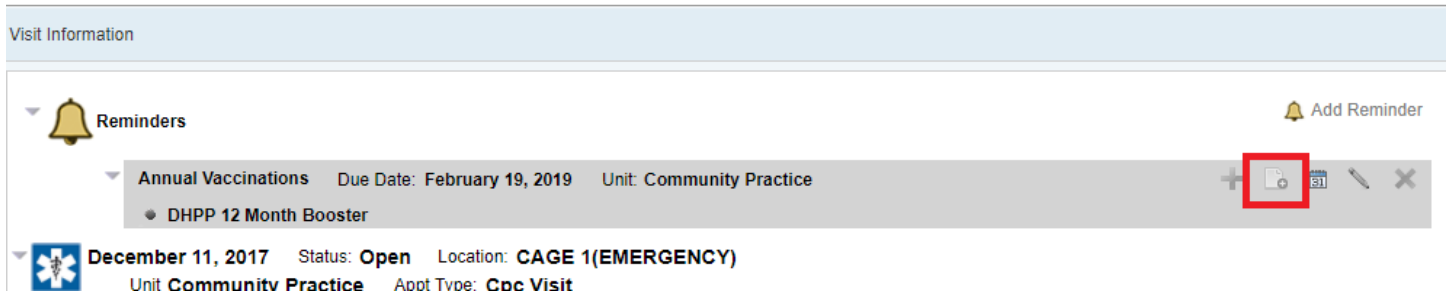
View Reminder Details on the patient record is identical to View Reminder Details on the Reminders Worklist. Please see *Working on a Reminder* for more information.

Context Menu

All functions on reminders can be accessed via right click. Additionally, a sub menu will open when a reminder item within a larger reminder is clicked, allowing you to manipulate the reminder item directly.
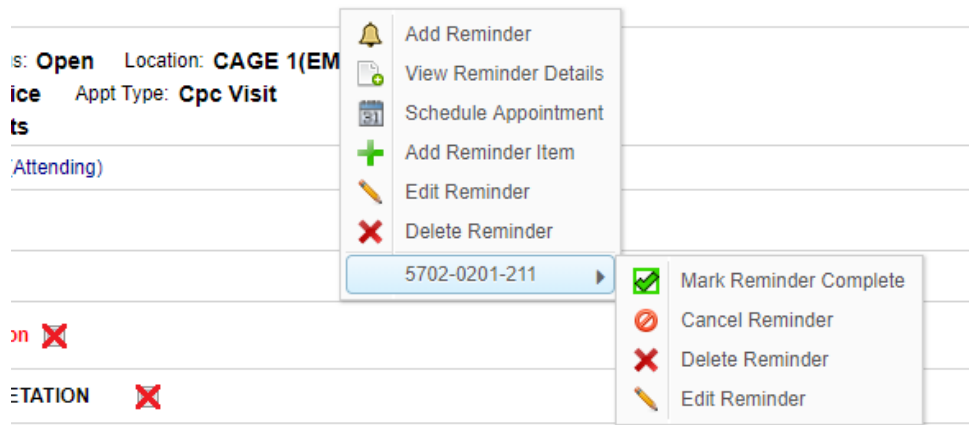
Patient Reminders Tab

This tab contains a list of all active and inactive reminders associated with the patient. Reminders are not interactive on this page; this is simply a log of reminders, and their current status. To interactive with incomplete reminders, you will need to use the Visit Information tab, or use the Reminders Worklist (for multiple patients.)

	Reminder Name	Due Date	Unit	Status	Internal
>	Annual Vaccinations	Feb 19, 2019 11:20 AM	Community Practice	Incomplete	☐
>	Annual Vaccinations	Nov 16, 2018 9:33 AM	Community Practice	Completed	☐
>	Test	Mar 22, 2018 8:33 AM	Internal Medicine	Cancelled	☐
>	Test	Mar 16, 2018 4:55 PM	Behavior	Cancelled	☐
>	Annual Vaccinations	Mar 12, 2018 11:20 AM	Community Practice	Completed	☐

Feature	Type	Function
Patient Reminders	Tab	Contains a list of all past and current reminders for the patient, and the status.
Reminder Type	Column	A list of the reminders. Individual products are not included on this page, as the actual items administered will be recorded during the episode for past reminders, and they are listed in the Visit Info tab for current reminders.
Due Date	Column	The date that the reminder is or was due.
Status	Column	The status of the reminder. Current incomplete reminders appear as Incomplete. Reminders that were created but never completed before due are Expired. Reminders can also be cancelled or marked as Complete or marked as requiring a follow up. (See the Reminder Worklist for details on the statuses.)
Internal	Checkbox	Indicates whether this reminder is internal or not. Internal reminders shouldn't be sent to clients.
(Edit) Pencil Icon	Button	Opens the View Reminder Details to allow for a status change on the reminder. Requires the View Reminder privilege.

Reminders generated by catalog items added to the patient record

If a document or requested is added to the patient record for which a reminder template has been associated, then adding the document will automatically generate the reminder.

For example, a Cardiology Recheck Reminder is associated with a "Cardiology Consult Echo and ECG" request.
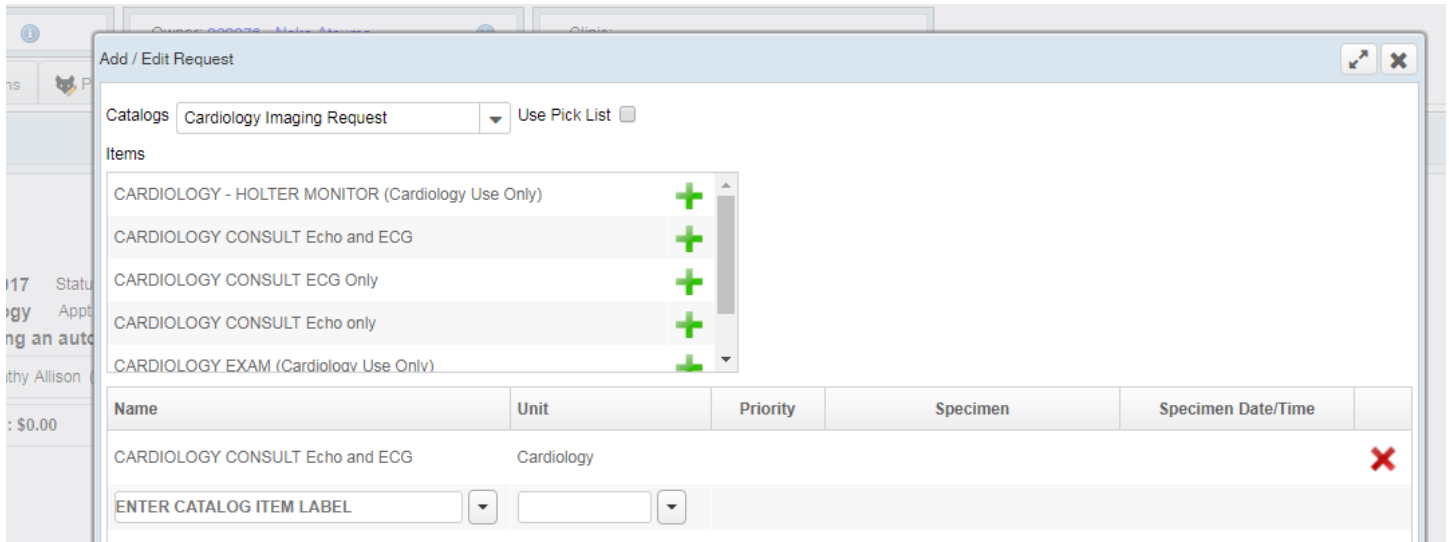
Adding this to the patient record will automatically add in a reminder with the defaults based on the template.

Documents or Requests that are linked to catalog items will by default appear at the bottom of the request.
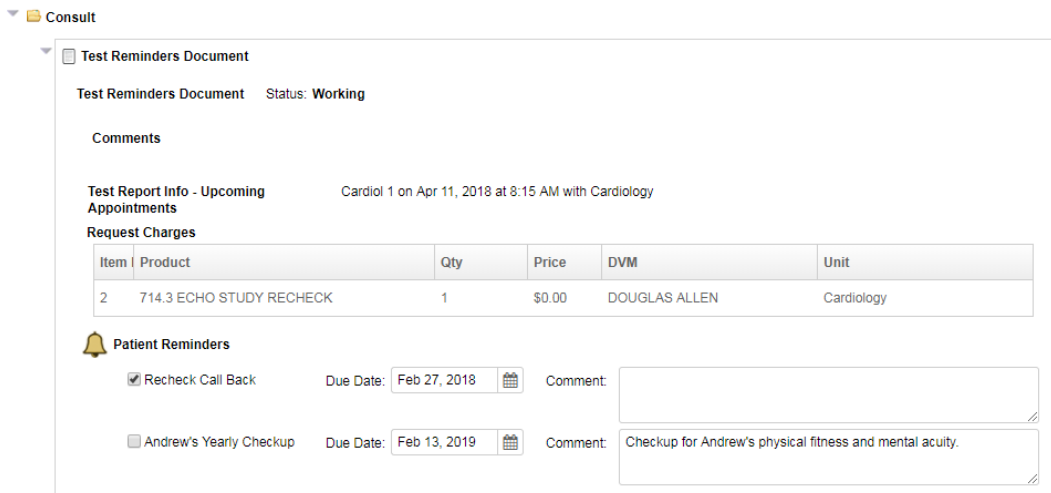
However, if you defined a Result type for Reminders, then you can control where they appear in the document.

Reminders on Orders

When an item is added to an Order that has a reminder associated with it (at the product level), the reminder will become available to add based on the pre-defined rules of the template type. Reminders that are turned on by default will automatically be checked the first time the product is added to the bill.

The reminders are at the bottom of the Item Details section.

Reminders will be added to the Patient Record as soon as the item is saved. If the item is removed from the bill, then the reminder is also removed. Comments can be added at this point as well.

Items that point to the same Reminder template will be automatically combined. Items that point to the same individual reminder item will be duplicated, however, so be careful when setting up the reminder types and templates to avoid having unclear reminder names associated with different products. For example, be sure that the "client visible" portion of a reminder text includes pertinent information: e.g. Heartguard 100 lb. and Heartguard 25 lb. can be generated off the same reminder, but the client visible text should contain more information than just "Heartguard" for when multiple Heartguard items are added to a bill.

Feature	Type	Function
Patient Reminder	Section	The new reminder section underneath the product details on the Order page
(Active/add)	Checkbox	Toggles on the reminder. For products that can generate multiple reminders, you can choose to have certain ones defaulted to on or off at the setup level.
Due Date	Date picker	The due date for the reminder. This will be auto generated based off the reminder template but can be adjusted at this point prior to saving.
Comment	Text field	A comment box to add in any information appropriate to the reminder

Reminder Worklist

The Reminder worklist is the search and display of all historical reminders for all patients in the system. This page is intended to be used by your unit coordinators or the front desk personnel that handle scheduling, call backs, mail outs, etc. It contains two major sections: A search window, and a results list.

The Reminders Worklist is modelled after the Comm Worklist, and so communications made to clients will be recorded on the appropriate patient's record via the Comm Log as well.

Patient Reminder Search

The search section allows you to find reminders by type, status, unit, due date, and even go as granular as specific clients or patients.

Feature	Type	Function
Client	Text Field	Allows you to search for reminders based on client name or number.
Patient	Text Field	Allows you to search for reminders based on patient name or number.
Unit	Text Field	Allows you to search for reminders based on the unit assigned at the time the reminder was added to the record
Due Date	Date Pickers	Allows you to search for reminders based on a specific date, or during a date range
Reminder Name	Drop Down	Allows you to search for Reminders based on the name (type) of the reminder
Type	Radio Buttons	Allows you to search for only internal reminders, only client reminders, or both of them at the same time
Status	Checkboxes	Allows you to filter the search based on status. For example, if you will be using this search to generate your list of call backs for the day, you can filter by Incomplete, Follow Up, and Failed (email did not send.)
Search	Button	Generates a list based on your select search parameters
Reset	Button	Clears out the search parameters so you can perform a new search

Reminder Search Results

Once you have searched based on a set of parameters, the results will display below. The results list has a series of rows containing the data for the reminders, which can be expanded and collapsed.

Once expanded, the details for the reminder become visible.

Feature	Type	Function
(Checkbox)	Checkbox	Allows you to select this reminder for bull actions
Client	Link	A link to the client record for this reminder
Patient	Link	A link to the patient record for this reminder
Reminder Name	Text	The template associated with the reminders
(Reminder)	Text	The product or item associated with the reminder
Due Date	Date	The date the reminder is due. This is generated by the rules set for the reminder.
Unit	Text	The unit associated with this reminder (and thus responsible for ensuring it is followed up on)
Status	Text	The status of the reminder. All reminders are incomplete once created.
Internal flag	Checkbox	Indicates whether this flag is for internal communication only

Working on a Reminder

Click on the edit pencil next to a reminder to open it up and view the details.

This will open up the View Reminder window, which contains the tools to change the status of the reminder, and to track communication on the patient's Comm Log that are associated with the reminder.

The Edit Reminder window allows you to change the status of the reminder, adjust the unit, add notes, schedule the reminder, and add additional items to the reminder as necessary.

All reminders are in "Incomplete" status until they have been changed. The change occurs on this page, or on the patient record (requires the View Reminder privilege.) Statuses include Completed (for reminders in which you have made contact with the client), Scheduled (for reminders scheduled into appointments), Cancelled, Follow Up (in which contact was made but you'll need to call back for any reason), Failed (for bounced emails), and Deleted (for reminders which were removed from the patient record entirely.)

Supported Workflow: A client coordinator pulls up the list of reminders for their unit for the specified period of time (e.g. the next week.) The coordinator emails reminders that are set to be Email contacts, then calls the clients for any reminders that specify telephone communication. Any failed emails are returned as Failed, for a call back. Reminders for which contact has been made and the client responds can be changed to Completed or to Scheduled. (For example, if a reminder was for an annual vaccine and the client says they were done at another veterinary clinic, it would be Completed, since contact with the client was established.)

Feature	Type	Function
Patient	Link	A link to the patient record
Owner	Link	A link to the client's record
Reminder Name	Text	The name of the template for the reminder items listed
Unit	Drop down	The unit associated with this reminder
Status	Drop down	The status of the reminder. All reminders created are in "incomplete" status until they are changed.
Scheduled	Text	If an appointment was scheduled out of this reminder, the text will appear here
Schedule	Button	Goes to the Schedule page for this unit, and creates an episode based out of the patient information linked to the reminder, and the schedule slot
Reminder Details	List	Items associated with the reminders, and any comments

Comm Log Window

The View Reminder window contains a window pane that is linked to the patient's Communication Log. Any contacts established in the Reminder Worklist can be added directly to the comm log without going back to the patient record. Communications added here will be linked to *this reminder* and will re-load each time the reminder is worked on.

This way, you can keep a running tally of communication attempts made for the reminder, and any communication completed will automatically load on the Comm Log on the patient record, as well.
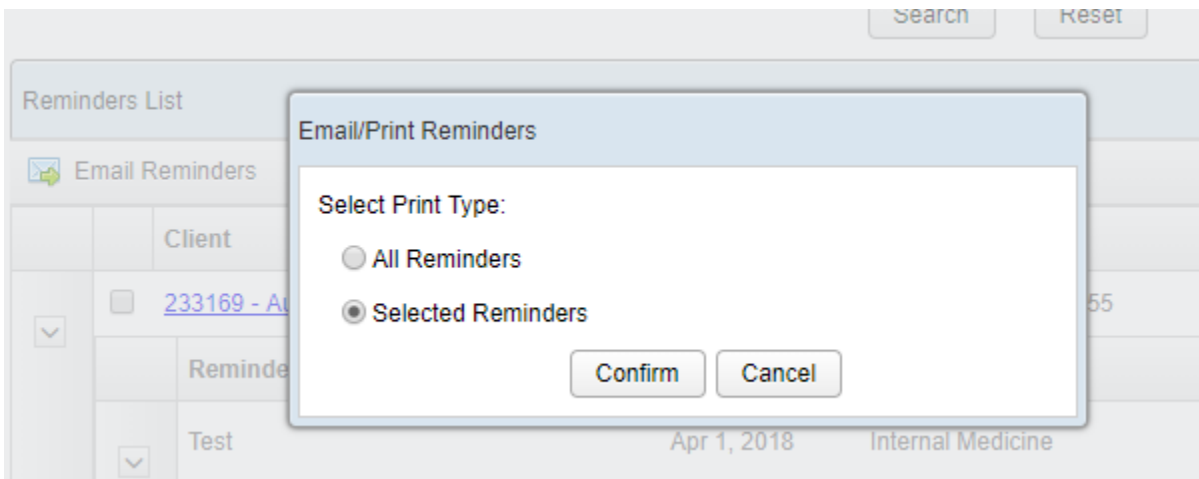

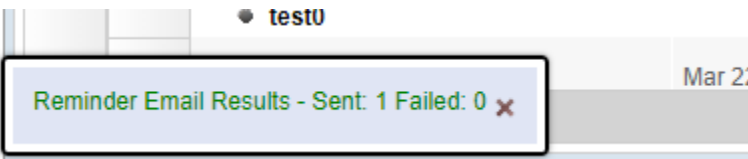| Feature	Type	Function
Comm Log Window	Window pane	Contains the fields for the Comm Log entry form
Date	Date picker	The date the communication with the client was made
Communication Method	Drop down	The method used to communication with the client. This will load options as defined in the Communication Type Setup tab
Contact	Drop down	The client contacted as part of this communication. Loads the Owner by default, but if another person on the contact list was reached instead, it can be set here.
Communication	Text box	The message relayed to the client
Internal Comment	Text box	Internal notes about the contact (e.g. left message on voicemail)
Log List	Text	The comm log entry on the patient Comm Log associated with this reminder. This pane will load any previous communication attempts on the reminder but will not load unrelated comm log entries put directly on the patient record or entered through the comm log. However, entries made on the Reminders list WILL appear on the comm log for the patient on the patient record.
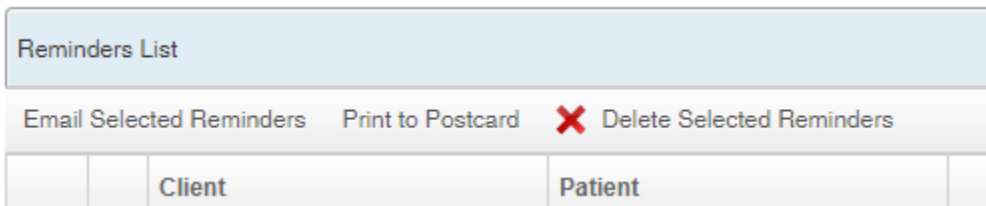
You can select reminders from the list that you wish to add to the Comm Worklist, then click on Email Selected Reminders to transfer them over.   The API will automatically send these emails out, and then mark the communication as sent on the Comm Worklist, so that the notice of the communication will be marked permanently on the record.

A confirmation window will open at first to allow you to choose whether the reminder will go to all patients in the search results, or only to the ones you have checked.

A success "toast" message appears on the bottom indicating whether or not the emails were able to send.

Feature	Type	Function
Email Selected Reminders	Button	Emails reminders to the selected clients.
Email/Print reminders	Window	Contains the ability to choose to send reminder emails to all clients on the search results, or to only email the selected clients
Confirm/Cancel	Buttons	Standard button set to choose whether to proceed with the email, or to cancel and return to the worklist
Results	Toast Message	Indicates how many emails succeeded or failed

Print to Postcard will generate a PDF report that can be customized to fit your printer's postcard settings. Once the PDF is generated, these reminders can be marked as completed.

Click on Print to Postcard. A small window will open asking if you want to do it for all reminders (the entire search results) or only the selected ones.
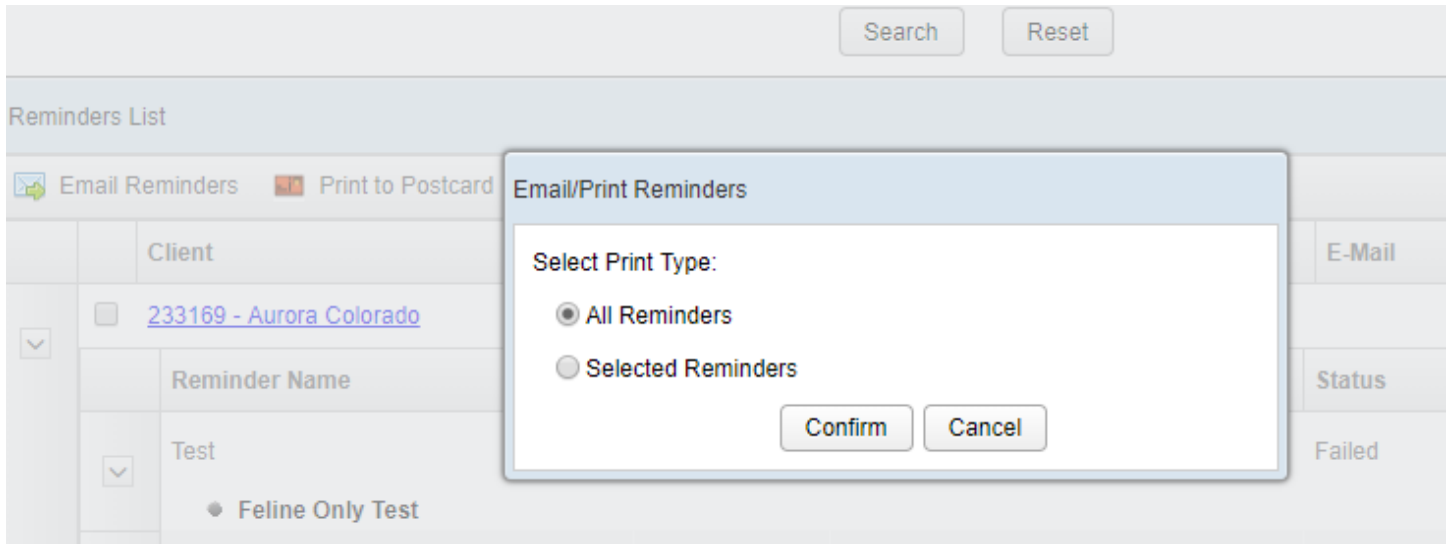
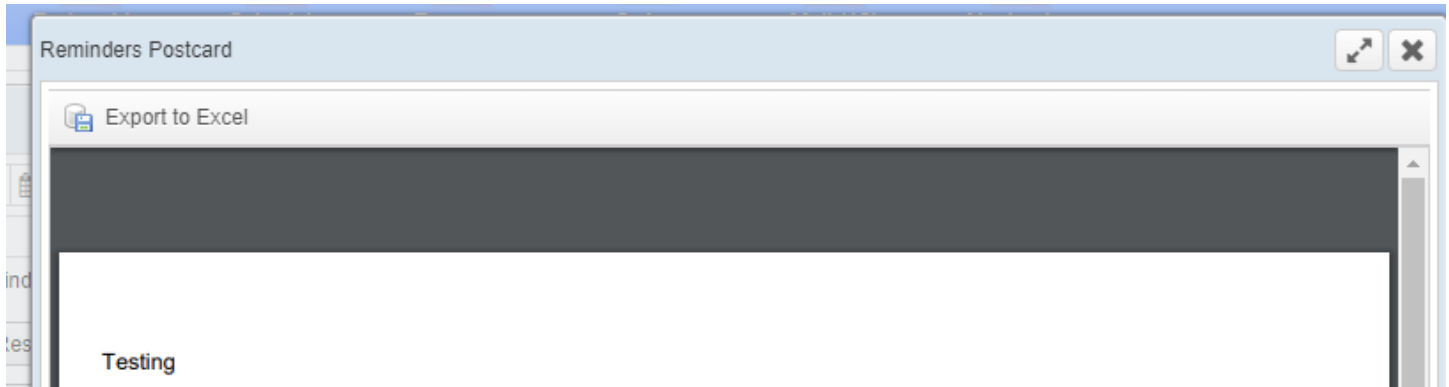The exact nature of the PDF will need to be designed at the Label level. We also have plans to allow you to export these results to Excel, so that they can be utilized as part of a Mail Merge and printed onto labels.

Feature	Type	Function
Print to Postcard	Button	Opens up the Email/Print Reminders window to choose whether the bulk action should be performed on all reminders or only the selected ones
Email/Print Reminders	Window	Allows you to select the print type: All reminders, or Selected Reminders
Confirm /Cancel	Buttons	Standard buttons to confirm the selection, or to cancel and exit back out to the Reminders Worklist

Bulk Action: Update Reminder Status

For reminders of products or services that are no longer behind expired, or for any other reason you would want to perform a bulk action on the reminders in the worklist, you can click on "Update Reminder Status."


This will let you change the status either on all search results or only the selected reminders, and also if desired add to the comm log of each patient an entry regarding that reminder. You can also add an internal comment as to why the mass action was performed.

Note: Bulk actions performed on All Reminders, when there are many search results, can take several minutes to complete. The VetView spinner will appear to let you know that the work is still ongoing.

Feature	Type	Function
Update Reminder Status	Button	Opens the Update Reminder Status window to perform a bulk status change on all reminders or only selected ones
Select	Radio Buttons	Choose between All Reminders (current search results) or Selected Reminders (checked items)
New Status	Drop down selector	Allows you to select the status to change all the reminders to
Date	Date Picker	The date that this status change will be marked as, and added to the comm log
Method	Drop down	The comm log method that will be added for each reminder in the status change. This is optional.
Communication	Text field	The communication that will be added to the comm log for each reminder in the status change. This is optional.
Internal Comment	Text field	An internal comment that can be added to each reminder in the status change. This is optional.

Deleting these reminders will mark them as Cancelled and remove them from the search results. Use this as a bulk method of clearing out reminders for products no longer offered, for example.
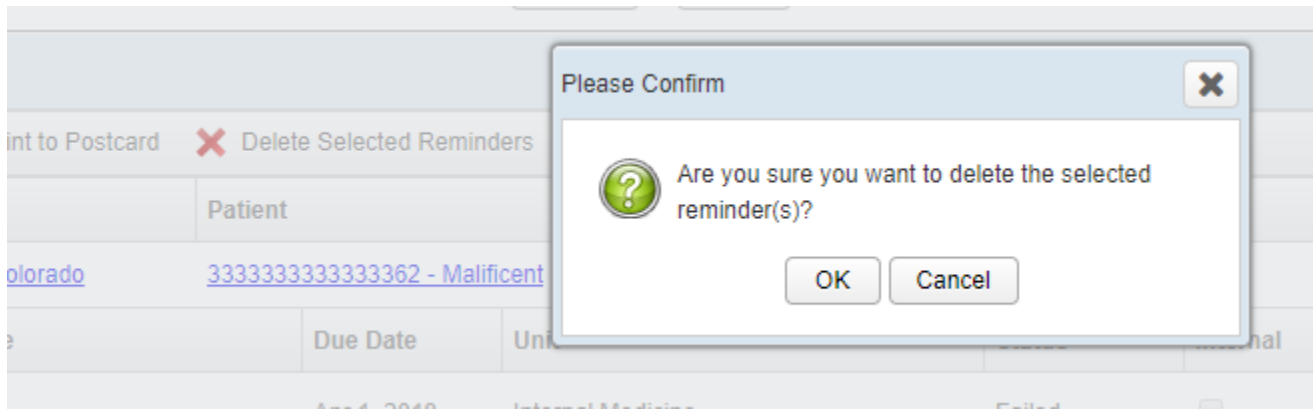
Feature	Type	Function
Email Selected Reminders	Button	Emails these reminders to the clients, and marks the communication as sent on the Comm Worklist as a completed entry
Print to Postcard	Button	Opens up a report form to print this to PDF in a postcard format that you have designated.
Delete Selected Reminders	Button	Marks these reminders as Cancelled and removes them from the search results. Intended for bulk use on discontinued products or services, or for all the patients of a client who has requested Do Not Communicate, etc.

Deceased Patients

Patients who have been marked as deceased in VetView will not show up on any of the working screens for other patients. Specifically, any previously scheduled reminders for them will be filtered out from the Reminders Widget, the Reminders Worklist, and the Admission screen for patients that are being admitted when the owner has other patients in the system marked as deceased.

Deceased patients will still have their reminders in the system, until they automatically expire at the scheduled time. Reminders may be added to patients who are deceased (for example, if the client care team wants to set up internal reminders to send out condolence letters.) New reminders for deceased patients can only be added via their medical record, however.

In the event that the patient was incorrectly marked as deceased, once the flag is turned off for that patient, all reminders become live and active in the system again. This ensures that data is not lost in the event that the wrong animal was marked as deceased.

Reminder Privileges and Recommended Roles

Privilege	Purpose
Access Communication Type	Allows admin access to the communication tab
Access Reminder Card Setup	Allows the user to see Reminder Card Setup in Navigation with basic read only rights on the first tab
Access Template Setup	Allows the user to access the Reminder Template Type and make changes
Add reminder	Allows the user to add a reminder to the patient record or to the bill
Add/Edit Template	Allows the user to create a new Reminder Template on the setup page
Delete Templates	Allows the user to delete templates
Delete Reminder	Allows the user to delete a reminder from the patient record and the work list
Edit Reminder	Allows the user to edit a reminder from the patient record and the work list
Schedule Reminder	Allows the user to schedule a reminder from the patient record from right click schedule page)
Send Reminder	Allows the user to process a reminder on the worklist page
View Reminder	Basic privilege to allow a user to view reminders on the patient record, bill/order, etc.
View Work List	Grants access to the Reminder worklist page

All roles: View Reminder

Students, Clinicians, Cashiers: Add Reminder, Edit Reminder, Inactivate Reminder

Front Desk personnel / Unit Leaders / Administrators: Add Reminder, Add Edit/Template, Inactivate Reminders, Mark Reminder Complete, Search Templates, Send Reminders, View templates, View Worklist

If you wish to restrict your unit leaders from editing the templates, you may grant them access to the reminder worklist separately from the reminder setup page. The exact split of duties at the admin level will need to be customized based on who is responsible.

We recommend at a minimum granting at least one designated person within your hospital (outside of the admins) access to the Reminder worklist for processing the reminders on a regular basis. This person may be someone who works your front desk, or someone who is designated for that task in medical records; ideally it is the current person or team you have doing callbacks in your current workflow.

We also recommend granting at least one person in each unit the roles necessary to create and manage the templates for the unit. For example, someone in Pharmacy should have the admin rights to adjust or change reminders based on medication. Someone in Inventory should have access in case you want to set up internal reminders to complete inventory tasks, etc.