



Sometimes a client needs a call back to check on a patient's status after surgery or some other treatment. IntraVet helps you track and automate the callback process. Callback Reminders are entered via the invoice or through Patient History by using a code setup for a callback. Code names can be general such as blood work reminder, then modified to fit the actual item by changing the description during invoicing or through patient history. After the set period of time, callbacks are automatically "purged" off the patient record.

Example:

Let's say that I have lab work I call Mini Health Profile which takes 5-7 days for the results to come back. I can set that code up to show on the callback list in __days. I want to set it up for the 7 days since it could take up to that long for the results to come back. When I invoice out the code Mini Health Profile on June 10th & save permanently, that code will prompt that it is a callback code, at that time I can click OK (or enter) and accept the default date or choose to modify the date I want the callback to show up on (maybe I want to put it on the 20th instead of the 17th which it would normally show up on had I selected to ok the default date.). For our purposes, I used the default date of the 17th. When I run the callback reminder search on June 17th, the lab work will show up under the doctor as a callback. If the doctor isn't in the office that day, you could leave a message for that doctor or go into the Edit Reminder section of a patient's history and edit the date to show up on a future callback list, when the doctor would be in.

BASICS OF SETTING UP A CALLBACK:

Callbacks can be edited at the time of service. A callback must have a number of days until it is due and a number of days to keep it past the due date. You can search for callbacks in the Communications/Callback section of the program.

1. Check the box that says, "This is a Callback code".
2. Enter the number of days until the callback is due.
3. Enter the number of days until you want the callback to be automatically erased. Think about how long you want to be able to go back & search for a callback when making this date. If you make it for too short a period of time and no one is able to make callbacks, it may fall off the list too soon. Increasing the length of days will not cause it to continue to show up each day but will keep it on the list if you need to search back dates.
4. Check "Include in reminder search" if you want this reminder to be included on the regular reminder cards you send out rather than show up on the callback list. If you prefer to send a card for blood work reminders rather than have it show up on a list for you to call, then select this option. This will generate a reminder card with the text for the reminder based on either the default name of the callback or the changed description.

NOTE: A callback reminder or a regular reminder under the reminder Tab may be set, but not both.

CALLBACKS DURING INVOICING:

If a code is setup with a callback it will prompt the following:

Invoice .. Mr. Charlie Brown [22023]

Patient	Code	Description	Dr	Date	Qty	Price	Amount
SNOOPY	L202	Feline:Senior Panel	1	02/04/2008	1.00	75.00	75.00
SNOOPY	BW	Blood work	1	02/04/2008	1.00		

Original code description

This code is setup for a Callback reminder.

For: Chem Profile

Due: 04/04/08

Clear the Callback: (Number of Days after the date it is due) 90

OK Cancel

Description, due date and # of clear days can be changed

Total Invoice 75.00
Tax
Discount 20% 15.00
Total Balance 60.00
Payment
Net. Bal.Due 60.00

Balance Due: \$ 0.00

Branch: 1
Class: 1
Search 1: FARM
Search 2: None
Number of Patients: 1

Payment Transactions New Patient Edit Patient Edit Client Client Notepad E-mail Close

CALLBACKS IN PATIENT HISTORY:

Callbacks can be inserted through Patient history by right clicking in the history & selecting the *Reminders* menu choice. The following window will prompt:

Reminders .. Mr. Charlie Brown [22023] SNOOPY

Code	Description	Dr	Date	Due For	Due Date	Days
82210	VAC:Distemper/PV/CPV/I	RV	01/12/2008	82209	01/30/2008	
82211	VAC:Bordetella Booster	1	02/16/2007	82211	02/16/2008	
L110	Fecal testing:Worm examination	RV	01/12/2008	L110	01/11/2009	
82259	VAC:Rabies Vaccine:3Yr.	1	02/02/2006	82259	02/01/2009	

BW Chem Profile Recheck 1 / / BW 04/04/08 90 N

Delete Line Clear Entry Line Manually Clear Reminder

This entry is an automatic reminder. It can be manually cleared, but not deleted. The due date can be modified.

A code, a description, and a due date must be entered. Doctor code is optional. Days column shows the number of days a callback will be valid after the due date.

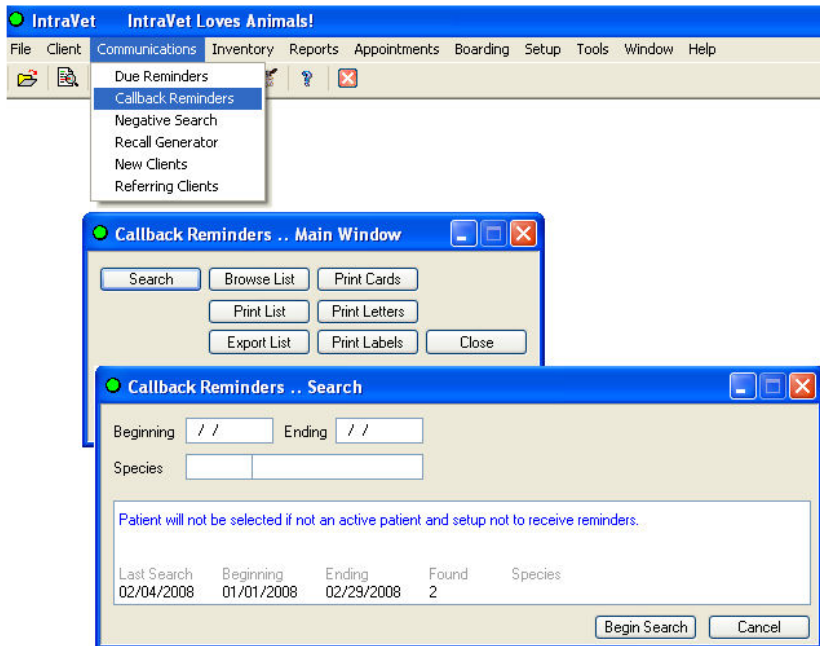
Audit Trail Recalculate Save Close

Change description, assign a doctor, change due date and # of days to clear before entering the line item up into the grid

SEARCHING CALLBACKS:

To search for callbacks that are not setup as reminders:

1. Go to *Communications > Callback Reminders*
2. Click on *Search* and enter your date options and select a species if desired.
3. Select *Browse List* (You can delete those you do not want on the list just like in the reminder search) OR
4. Select *Print List* (can be printed by doctor)



Callbacks are purged automatically from a patient's history after the desired number of days has passed. You can also delete them manually from a patient's history by going into the reminder window, selecting the callback code and choosing delete.

Callbacks can be searched by whatever date range you choose. While some clinics do them on a day to day basis, other clinics like to search the callback list with weekly dates and will delete those they have called back on so they do not continue to show up on the list the following day when they search the same weekly dates.