

Summary Side Panel

30/07/2025 2:52 pm BST

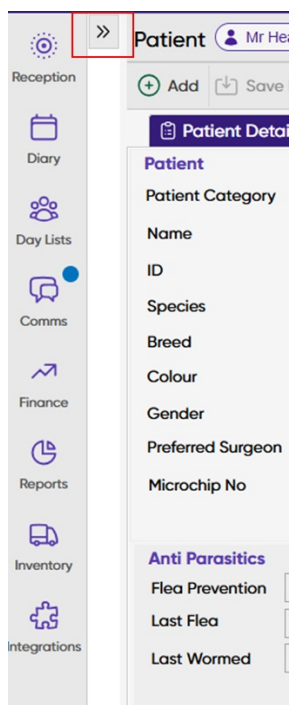
Summary

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

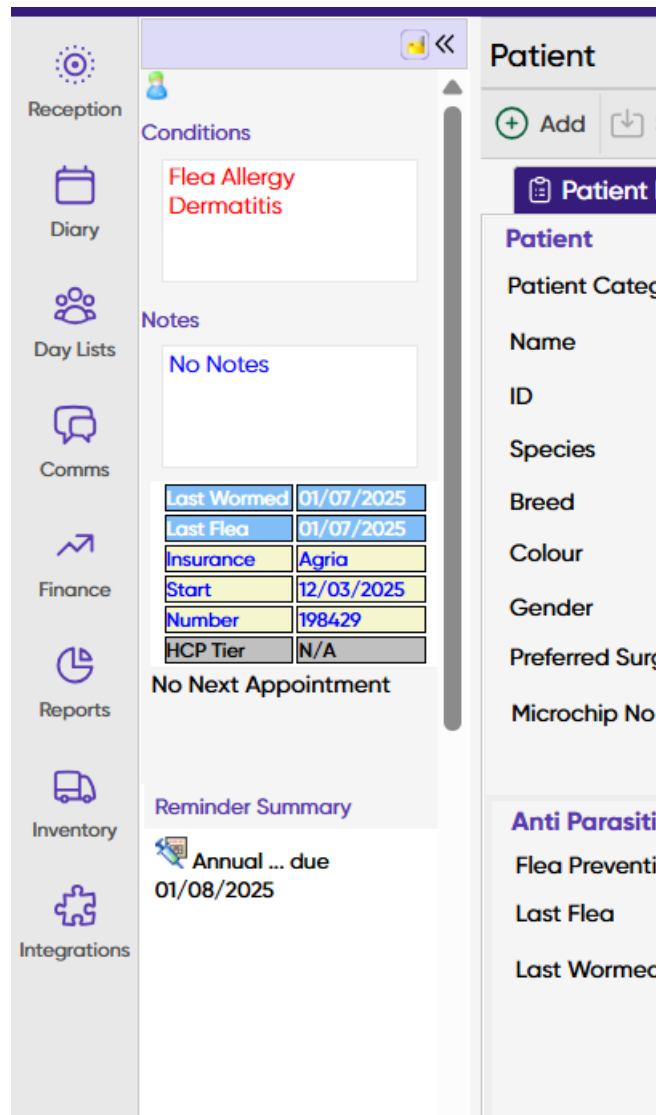
Once a patient has been selected, this bar can be viewed whilst navigating to other areas of the system.

Using the Summary Side Panel

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



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



This bar contains the following information:

- Preferred Surgeon if applied within patient details
- Patient Conditions - Double click to add/edit from here or from the patient details screen.
- Patient Notes - Double click within the box to add/edit.
- Last wormed date
- Last flea date
- Insurance information
- The next scheduled appointment
- Summary of Patient Reminders
- Summary of Compliance Reminders

Note: Users have the choice of which patient reminders show in the 'Reminder Summary' section. This is by using the tick boxes within the reminder types library.

Name	Description	Treatment Type	View Order	Always show in Summary
		All	0	<input type="checkbox"/>
6 Month Health Check	6 Month Health Check	coffe	0	<input type="checkbox"/>
Annual Vaccinations	Annual Vaccinations	All	0	<input type="checkbox"/>

