

Treatment History

16/09/2025 8:59 am BST

Summary

The History tab of the Treatment screen shows all the clinical information relating to the selected patient.

Details

View a Patient's Treatment History

The Treatment screen can be accessed in multiple ways:

- Double-Click an appointment from Diary/Day List.
- Double-Click a patient from Reception.
- Select the 'Treatment' button from Reception.
- Right click on a Diary appointment - View History

When the Treatment Screen is loaded, the History tab is the first to be displayed. The most recent history is seen at the foot of the screen; the previous notes can be seen by scrolling upwards.

Treatment

ActivitiesAdministration

PaymentsReferralPrint HistoryBarcodeClinicalDoc MgmtMake ApptAccountWeightConsentView PACSRefreshPatient LabPatient DetailsSend To

HistoryPre-InvoiceAdd TreatmentPrescriptionsSaved EstimatesDocumentsPatientsClient NotesArchiveHealth Care Plan

Filters: DescriptionClinical CodeAllTreatment TypeAllShowAllResetSettings

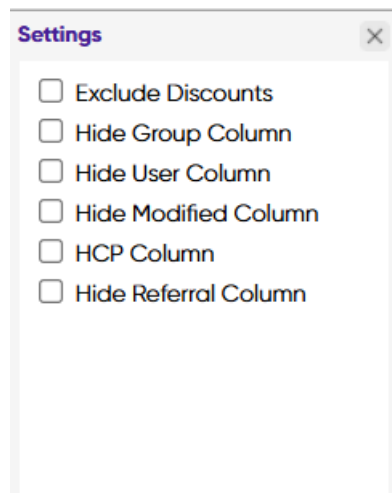
	Date	Time	Description	Clinical Code	Qty	Total	Surgeon	Site	Insurance
	11/07/2025	13:54	History - Sent to Hospital list	General	1	0.00		Esher	
	11/07/2025	14:31	Consultation Consultation - Nurse	General	1	22.05	Sharon Holland	Esher	
	11/07/2025	15:59	Tablet Metacam Oral Susp 10ml Dog (Give 1 ml 1 times a day for 1 days -- 123456 Expires: 29/12/2024 -- DO NOT GIVE ON AN EMPTY STOMACH)	General	1	14.15	Sharon Holland	Esher	1
	11/07/2025	15:59	NEXGARD CHEW TAB LGE DOG 10-25KG 3 PK (Dose according to weight -- 123456 Expires: 13/01/2026)	General	1	20.86	Sharon Holland	Esher	1
TOTAL(Excluding Discounts)						57.06			
Date: 15/07/2025									
	15/07/2025	12:47	Document Created - GA consent form.docx	General	1	0.00	Jamie Smith	Esher	
TOTAL(Excluding Discounts)						0.00			
Date: 01/08/2025									
	01/08/2025	14:05	Prescription - VET_PRESCRIPTION_1266592_DOCUMENT_1754053532400.docx	General	0	0.00	Jamie Smith	Esher	
	01/08/2025	14:04	Tablet Metacam Oral Susp 10ml Dog - Written Prescription	General	1	0.00	Jamie Smith	Esher	
Grand Total(Excluding Discounts)						57.06			

Show/Hide Information

To modify the view of the treatment history screen, select the 'Settings ' button. This will allow you to hide the following:

- Exclude Discounts
- Group Column

- User Columns
- Modified Columns
- HCP Columns
- Referral Columns



This view is configured per user and is remembered by [User Profile](#).

Filters

The following filters can be used to search and/or sort a patient's Treatment History.

Filters: Description Clinical Code Treatment Type Show

Description = Search by description of item/clinical note/document.

Clinical Code = Search by clinical code.

Treatment Type = Filter by treatment type.

Show = Additional filter to only show certain activities such as treatment items, clinical notes, prescription items.

Reset = Select this button to reset any filters.

Right-Click Options

Right-clicking on an item in Treatment History presents you with various options.

All applicable options for the item selected will display in bold. All non-applicable items will display in grey and you are unable to select them.

-  Filter by Selection
-  Remove Filter
-  Transfer
-  Authorise Repeat

-  Reprint Label
-  Edit Label

-  Save Insurance
-  Add To Existing Insurance
-  Print Insurance
-  Email Insurance
-  VetXml Insurance
-  Delete Insurance
-  Add to Draft
-  Repeat for Today
-  Reprint Label & Dispense
-  Edit Document
-  Download Document

-  Remove from Invoice
-  Add to existing invoice

The options function as follows:

Option	Description / Function
Filter by Selection	An additional filtering option is to right-click on any part of the treatment history and filter by the description. For example: To filter the history for all work by a description, find one instance of this description, right-click on it and choose 'Filter by Selection'
Remove Filter	'Filter By Selection' can be un-done by right-clicking and choosing this 'Remove Filter' option.
Transfer	Occasionally, you will inadvertently enter work onto the incorrect patient's records. To transfer history from one patient to another, select the items you wish to transfer, select Transfer and specify the Client/Patient you wish to transfer history to using the wizard provided.

Authorise Repeat	The purpose of this feature is purely to make the items stand out in the clinical notes for easy recognition. The item will be highlighted against a green background.
Reprint Label	To re-print a dispensing label for an item which has previously had a label, right-click on the item and choose 'Reprint Label'.
Edit Label	If a label was printed for this item, then right click on the items line and select edit Label. To change the quantity re-enter the dispensing instructions, eg '5 tablets twice daily for 14 days' this will enter 140 into the Quantity. Print the label or save without labels as required to save.
Save Insurance	Saves insurance claim.
Add to Existing Insurance	Adds to existing insurance claim.
Print Insurance	Prints Insurance Claim associated to item selected.
Email Insurance	Emails Insurance Claim associated to item selected.
VetXML Insurance	Sends Insurance Claim associated to item selected to VetXML .
Delete Insurance	Removes the selected item from the insurance claim.
Add to Draft	Adds the item to draft for today's date.
Repeat for Today	Adds the item to the Add treatment screen for today's date.
Reprint Label & Dispense	Reprints the label for the selected item and adds item to the Add treatment screen for today's date.
Edit Document	Edit the document selected.
Download Document	Downloads the selected document
Remove from Invoice	Item removed from the invoice As long as it's still within the closed accounting period

Add to existing
Invoice

Add an unpaid item from history to drafts