

Register a Patient

30/07/2025 12:09 pm BST

Summary

Patients can be registered to new and existing clients.

There are two ways to enter the add patient screen.

Details

1. When client registration is complete and you have recorded their data consent preferences, you will be directed to the add patient screen. This is controlled via [Settings - Reception](#) 'Add Patient from Add Client', if this setting is unticked navigate back to Reception and then go to Add.
2. When selecting a Client in the Reception screen, select the 'Add' button.

The screenshot shows the 'Reception' screen of a veterinary software interface. At the top, there's a header bar with 'Reception' and a user profile 'Sir John Smith'. Below this is a toolbar with various icons: Clear, Save, Modify, Deactivate, New Document, Accounts, Payments, and Appointments. A secondary toolbar contains tabs for Client Details, Additional Info, Notes, Documents, Communication, Data Consent, and a red 'Add' button. The 'Client Details' tab is active, showing a form for adding a new patient. The form includes fields for Title (Sir), Surname (Smith), First Name (John), Patient Category (Small Animal), and Reg. Date (29/07/2025). The 'Add' button is highlighted with a red box.

Registering a patient

1. Once on the patient details screen, add all the known details under the patient details tab.
Note: All items shown with a * are mandatory items, these must be completed before you are able to save.
2. Once all information has been added under the patient details screen click the 'Save' button.

Entering Patient Details

The layout of the patient details screen changes dependent on the 'Patient Category' selected.

Small Animal

Patient Mr John Smith Activities Administration

Cancel Save Patient Modify Deactivate Patient Clipper Treatment Lab Request Make Appointment Transfer Patient

Patient Details Notes Reminders Lab Result Weight Chart Reminder Letters Referral Practice First Opinion Practice

Patient

Patient Category: Small Animal 1
 Last Visit:
 Yard Name:

Name:
 Registered: 30/07/2025
 Yard Town:

ID: 2
 Date Of Birth: Enter Age
 Yard Postcode:

Species:
 Age:
 Additional Name 1:

Breed:
 Weight: 0 Kg
 Additional Name 2:

Colour:
 Deceased:
 Additional Name 3:

Gender:
 Case No:
 Additional Name 4:

Preferred Surgeon: 3
☐ Passport Certified

Microchip No:
 Intended for food chain:

☐ Cross Breed ☐ Imported Animal 4
 Discount Category: 6

Anti Parasitics

Flea Prevention:
 Insurance Plan: 5

Last Flea: 7
 Policy No:

Last Wormed:
 Policy Start:

Other Information

Loyalty Card: 8

Issued On:

Usage: 9

Height:

Int. Stable:

☐ Sold/Re-homed on: 10

Conditions

No Conditions

Field	Number	Description/Function
Patient Category	1	Similar to Client category, such as small animal, farm animal.
Patient ID	2	When a new patient is added, it is assigned a unique identification number by the system. This is cannot be changed by the user.
Preferred Surgeon	3	If the client prefers to see a particular veterinary surgeon when they visit, the name of the surgeon can be allocated to the patient. This information is displayed to the user when booking an appointment in the diary.
Imported Animal	4	Adds a flag to the patient summary bar that the patient is an imported animal.
Insurance Plan	5	To select the insurance plan the patient is on from a library. Users can then also include the policy number and the start date.
Discount Category	6	This works exactly the same way as Client Discount Category does, except this Category applies to the individual animal.
Last Flea/Worm	7	The date that the client last bought a flea/worm treatment for the patient is stored here, this value may be entered manually by the user. It is possible to configure treatments in code entry as 'Flea/Worm Treatments' so that this date is automatically updated.
Loyalty Card	8	Can be used to indicate if the client is a member of the practice loyalty scheme or to store a loyalty card number. This is separate to the inbuilt health care plan module. Users can also include the date it was issued.

Usage	9	The purpose for which the animal is used or stored here, e.g. Stud, Working, Show, Dairy, etc
Sold/Re-homed	10	If an animal has been sold and is no longer with this owner, check this box for reporting purposes and so that reminders are not sent. Users can also input the date here.

Conditions is used to store any important information pertaining to allergies here. This will display in the patient summary panel on the left hand side, and in red writing on the client/patient preview along the bottom of the screen.

The screenshot shows a patient management interface for a patient named Kevin. The sidebar on the left has a 'Conditions' section with 'Flea Allergy Dermatitis' listed. The main area contains various tabs and sections: 'Patient Details' (Name: Kevin, ID: 4578052, Species: Feline, Breed: DLH, Colour: Black, Gender: Female), 'Anti Parasitics' (Flea Prevention, Last Flea, Last Wormed), 'Insurance' (Insurance Plan, Policy No, Policy Start), and 'Conditions' (Flea Allergy Dermatitis). The bottom status bar shows patient information and the condition 'Flea allergy dermatitis' in red.

Farm Animal

Patient Sir John Smith X

Cancel Save Patient Modify Deactivate Patient Clipper Treatment Lab Request Make Appointment Transfer Patient

Patient Details Notes Reminders Lab Result Weight Chart Reminder Letters Referral Practice First Opinion Practice

Patient

Patient Category * Farm Animal ▼ Last Visit Yard Name 3
 Name * Registered 30/07/2025 Yard Town
 ID Herd Size 2 Yard Postcode
 Species * ▼ Additional Name 1
 Breed * ▼ Additional Name 2
 Additional Name 3
 Additional Name 4
 Preferred Surgeon ▼ ☐ Passport Certified
 CPH Number 1 / / Intended for food chain ▼ 4
☐ Cross Breed ☐ Imported Animal Discount Category ▼

Insurance
 Insurance Plan ▼

Field	Number	Description/Function
CPH Number	1	Available within Patient Category (Farm Animal Only), the 9 - digit County Parish Holding (CPH) number is the identification number of your farm.
Herd Size	2	Available within Patient Category (Farm Animal Only), this allows you to record the size of the Herd.
Yard Details	3	Register details of the animals location (if different from the clients location).
Intended for Food Chain	4	Used If the animal is intended to be used for the Food Chain.

Modifying a Patient Record

Any time you need to modify the patient record, navigate into the record and click 'modify'.

Patient Sir John Smith X Kevin X

+ Add Save Patient Modify - Deactivate Patient

Patient Details Notes Reminders Lab R

Patient

Patient Category * Small Animal ▼
 Name * Kevin

Following any changes, be sure to click 'Save Patient' to finalise.