

# Patient Record in More Detail

01/08/2025 4:16 pm BST

## Summary

This page looks at the patient record in more detail and includes what functions are available to use.

## Transfer Patient

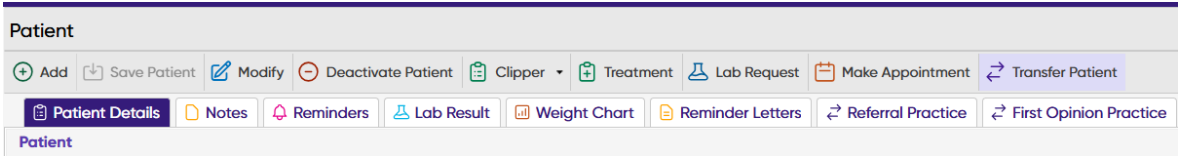
The transfer patient functionality allows you to transfer a patient from one client to another in the event of the animal being re-homed, sold etc.

Note: You are unable to transfer a patient if they are joined onto a Health Care Plan.

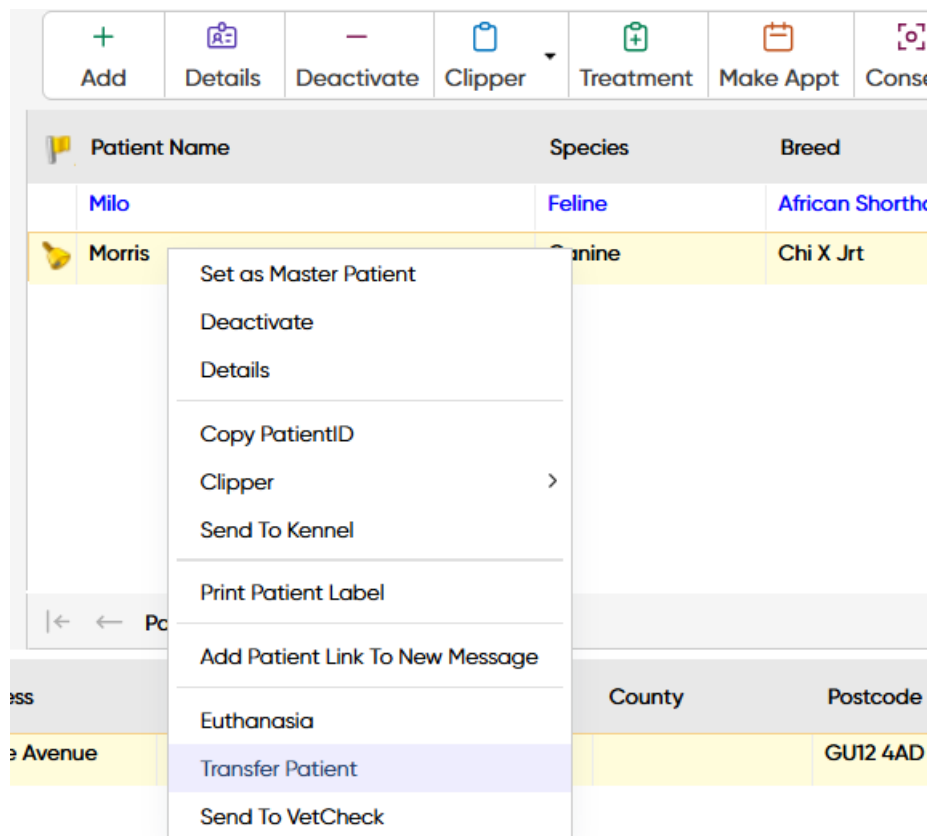
Note: This process does not transfer financials associated to the patient. If you wish to move debt, the process would be to perform a manual write off on the existing account and surcharge the new clients account.

### Transferring a Patient

1. Search for and select the patient you wish to transfer.
2. Go the patient details screen.
3. Select the 'Transfer Patient' button.



4. Alternatively, select the patient from the reception search, right click and press 'Transfer Patient'

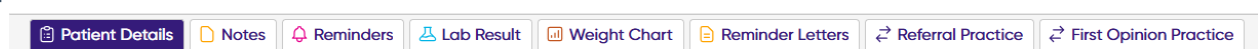


5. Once selected, the Transfer Patient window will appear. Search for the client you wish to transfer the patient to using the fields provided.
6. Once you have selected the Client, select 'Transfer'.
7. Once you have selected 'Transfer', the below window will appear prompting you to confirm and insert a reason for the transfer.
8. Once transferred, a confirmation message will appear. It will provide two options to proceed. You can either continue onto the current you have transferred the patient from or navigate to the client you have transferred the pet to.

## Patient Details

Patients can be registered to new and existing clients.

Within the Patient Details screen, there are eight tabs - each of which hosts a different subsection of patient details.



Each tab is documented below:

## Patient Details Screen

This screen is used to modify or register a new patient.

For information on how to register a patient, see: [Registering a Patient](#).

For information on how to modify a patient, see: [Modifying a Patient](#).

**Patient** Ms Ellie Lightowler X Milo X 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 Last Visit: 09/06/2025 Yard Name: Yard Town: Yard Postcode: Additional Name 1: Additional Name 2: Additional Name 3: Additional Name 4: Passport Certified: Intended for food chain: No Discount Category: No

Name: Milo Registered: 29/08/2024 Date Of Birth: 29/08/2014 Enter Age: 10 Years 11 Months 3 Days old Weight: 7 Kg Deceased: Case No: Additional Name 1: Additional Name 2: Additional Name 3: Additional Name 4: Passport Certified: Intended for food chain: No Discount Category: No

ID: 4567751 Species: Canine Breed: Cocker Poodle Colour: Beige And White Gender: Male Preferred Surgeon: Microchip No: 987222541110000 Cross Breed: Imported Animal: No

**Anti Parasitics**

Flea Prevention: Last Flea: 01/08/2025 Last Wormed: 01/08/2025

**Insurance**

Insurance Plan: AVIVA Policy No: 75347 Policy Start: 02/04/2025

**Other Information**

Loyalty Card: Issued On: Usage: Height: Int. Stable: Sold/Re-homed on: No

**Conditions**

Allergies:

## Patient Notes

The notes tab can be used to record any notes related to the patient. These may be notes about certain over-riding conditions or about the patient's temperament.

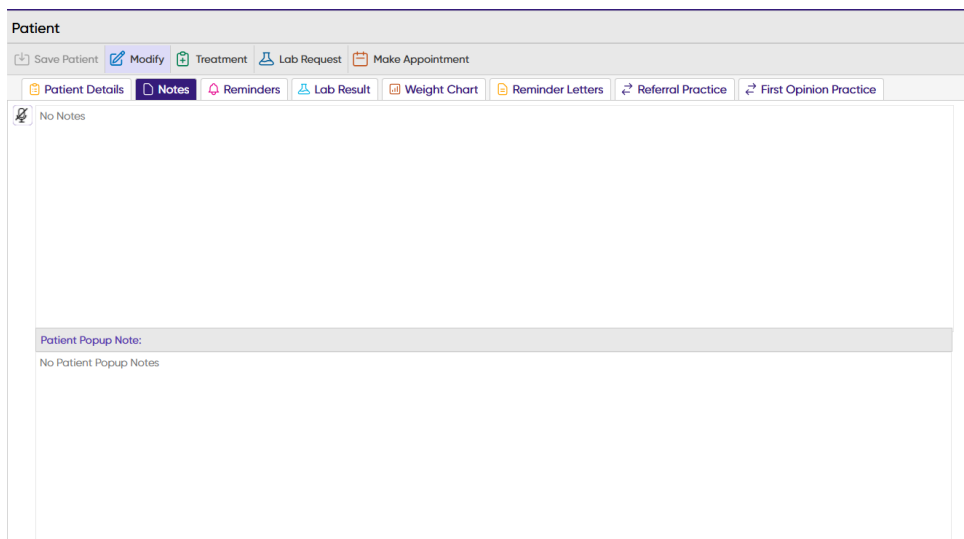
Notes stored here are also displayed in the notes section of the [Patient Summary Bar](#).

### Add a Patient Note

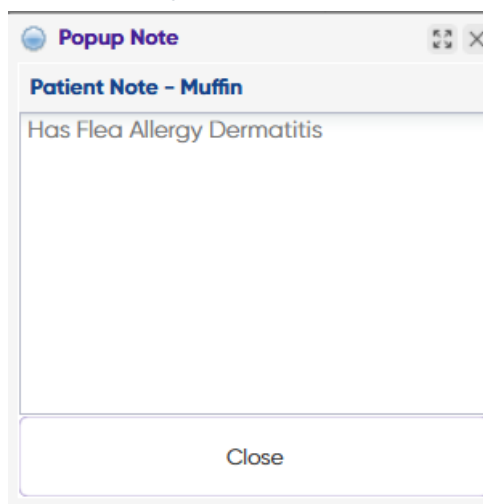
1. Enter 'Patient Details' screen.
2. Select the 'Notes' tab.
3. Add/amend the notes section.
4. Once finished with adding/amending the notes press the 'Save' button.

## Patient Pop-Up Note

Pop up notes can be stored per patient. Upon entering the individuals record, the pop-up note relating to their name will show.



To add a patient pop-up note, select the 'modify' button, add the note then click 'save'.



Note: Patient pop-up notes needs to be enabled within [Settings](#).

## Reminders

The Reminders tab within the Patient Details area serves two purposes. It allows you to view all patient & compliance reminders for a patient, and it allows you to manually add, remove or edit patient reminders.

### Add a Manual Reminder

1. Enter the 'Patient Details' screen
2. Select the 'Reminders' tab.
3. Enter the 'Date given' field and select the required date.
4. Select the 'Reminder Type' from the drop down list and select the product from the 'Description' field.
5. The length of the reminder will populate automatically.

6. Select the 'Save' button to add the reminder.

**Patient** Activities Administration

Treatment Lab Request Make Appointment Delete Reminder

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

**Reminders**

Date given: 01/08/2025 Type: Description: Length: 0 Period: Month Date due: 01/08/2025 Show inactive: ☐

Save

Reminder Type	Date Given	Date Due	Description	Work Site	Client Site
1 Annual Vacc...	01/08/2025	01/08/2026	Dog Booster Vaccination	Esher	Esher

**Compliance Reminders**

Reminder Date From: 01/02/2025 To: 01/02/2026 Status: Not Sent Description: Refresh Edit

Reminder Date	Description	Code	Treatment Date	Work Site	Sent	Sent Date
1 31/08/2025	Nexgard	nex	01/08/2025	Esher		
2 30/09/2025	Nexgard	nex	01/08/2025	Esher		
3 30/10/2025	Nexgard	nex	01/08/2025	Esher		

Users can view active compliance reminders and filter by the 'sent' status.

## Lab Result

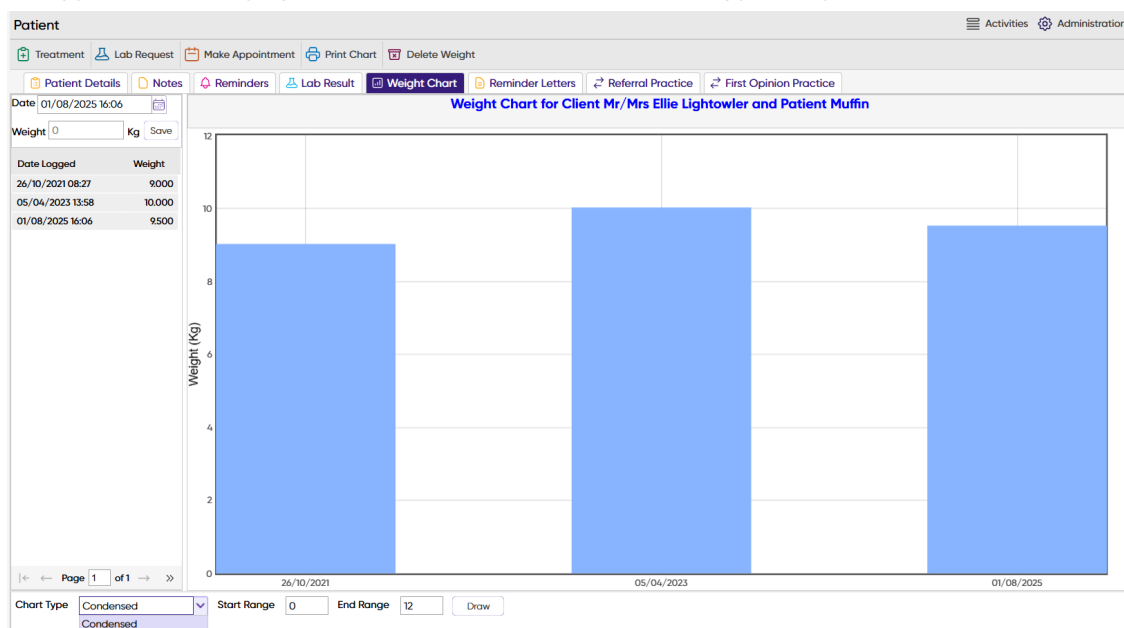
The Lab Result tab shows all stored lab results for the selected patient from either Internal Lab equipment or External Labs.

See the following pages for more information: [Internal Labs](#) and [VetXML Labs](#)

## Weight Chart

The Patients Weight Chart can be accessed and updated via the Patient Details area, by clicking on the Weight Chart tab. Weights updated in other areas of the application are automatically added to the Weight Chart.

Note: The type of chart displayed can be selected from the 'Chart Type' drop down.



## Add Weight options

1. Enter the Patient Details screen, Modify, add weight, Save
2. Right click on an appointment booked in the Diary and press 'Add Weight'
3. Enter the patient History screen, select Weight and either Add Weight or view Weight Chart

## Reminder Letters

The Reminder Letters tab is a list of all letters which have been generated to be to the client via post.

Patient					Activities	Administration
Treatment Lab Request Make Appointment						
Patient Details Notes Reminders Lab Result Weight Chart Reminder Letters Referral Practice First Opinion Practice						
Description	Work Site	Client Site	Reminder Date	Reminder Type		
1 NOBIVAC KC	Esher	Esher	09/07/2025	Kennel Cough		

## Referral Practice

The Patient Referral screen allows you to log where a patient has been referred from, when and why this occurred.

Note - All referral information can be added into separate library areas. Administration > Patients > Referral.

### Adding a Referral

1. Enter a 'Case number'.
2. Select a 'Referral Category'.
3. Select a 'Referral practice' from the drop down menu.
4. Note: Internal/External practices can be identified by the I/E icon.
5. Select a 'Referral Vet'.
6. Select the 'Initial Referring Date', this will automatically be today's date.
7. Select the 'Reason' for the Referral from the drop down list.
8. Type in the 'Notes' and select 'Register'.

Patient										Activities	Administration										
Treatment Lab Request Make Appointment																					
Patient Details Notes Reminders Lab Result Weight Chart Reminder Letters Referral Practice First Opinion Practice																					
<b>Details</b>																					
Case No.	1	New																			
Referral Category	Neurology	Manage Categories																			
Referral Practice	Pentagon Vets	Manage Practices																			
Referral Vet	John Davis	Manage Practitioners																			
Initial Date	09/09/2024																				
Referral Reason	Neurology	Manage Reasons																			
Ext. Practice Reason	Owner Request	Manage Reasons																			
Referring Vet	All Matorian (AM)																				
Notes	<div></div>										Register										
<b>Practice Details</b>																					
Case No.	2																				
Leeds Road																					
Wakefield																					
Leeds																					
West Yorkshire																					
Postcode	LS2 LS2																				
Tel	0113 25487966																				
Fax																					
Email	pentagonref@hotmail.co.uk																				
<b>Vet Details</b>																					
Mr John Davis																					
Tel																					
Direct Email																					
<b>Referral Category Filter</b>																					
All Delete																					
Case No.	Reason	External Reason	Vet	Practice	Referring Vet	Date	Category														
1 1	Neurology	Owner Request	John Davis	Pentagon Vets	All Matorian	09/09/2024	Neurology														

# First Opinion Practice

The First Opinion Practice Screen allows you to log where a patient has been referred from, when and why this occurred.

Note - All First Opinion information can be added into separate library areas. Administration > Patients > First Opinion.

1. Enter a 'Case number'.
2. Select a 'First Opinion Category'.
3. Select a 'First Opinion practice' from the drop down menu.  
Note: Internal/External practices can be identified by the I/E icon.
4. Select a 'First Opinion Vet'.
5. Select the 'First Opinion Date', this will automatically be today's date.
6. Select the 'Reason' for from the drop down list.
7. Type in the 'Notes' and select 'Save'

Patient

ActivitiesAdministration

TreatmentLab RequestMake Appointment

Patient DetailsNotesRemindersLab ResultWeight ChartReminder LettersReferral PracticeFirst Opinion Practice

Details

Case No.

1562

New

First Opinion Category

General Practice

Manage Categories

First Opinion Practice

First Opinion Vets

Manage Practices

First Opinion Vet

Tom O'Hara

Manage Practitioners

Initial Date

01/08/2025

First Opinion Reason

Fracture

Manage Reasons

Notes

Register

Practice Details

007

Home Road

London

Postcode

NW1 10DS

Tel

020 0044788

Fax

Email

Do\_Not\_Use@vetspace.com

Vet Details

Mr Tom O'Hara

Tel

07845781000

Direct Email

tom@vetspace.co.uk

First Opinion Category Filter

All

Delete

	Case Number	Reason	Vet	Practice	Date	Category
1	1562	Fracture	Tom O'Hara	First Opinion Vets	01/08/2025	General Practice