

Clinical Notes

31/07/2025 10:13 am BST

Summary

Clinical Notes can be added to the patient's record when adding treatment.

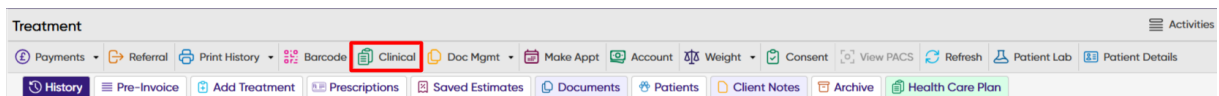
There are two methods of adding clinical notes:

1. The SOAP Method - History (subjective), Examination (objective), Diagnosis (assessment) & Plan.
2. Personalised Clinical Protocols - Implemented with an MWI Customer Product Consultant.

For information on Clinical Protocols, please contact your RCM or raise a ticket with support via the support portal or email support@mwiah.co.uk.

Add a Clinical Note

1. Enter the Treatment screen
2. Select the 'Clinical' button



3. The Clinical notes window will display. The window displayed will depend on which clinical note method you have configured.

SOAP - Default Method

The default screen will display as below:

Default Protocol - Poppet

History

Examination

Diagnosis

Plan

Select

Answer
Clinical Code

Select

Answer
Clinical Code

Select

Answer
Clinical Code

Select

Answer
Clinical Code

Back Save and Back Save and Exit Exit 30/07/2025 15:49 ☒ Enable User Short Text Short Text

1. The user can now type clinical notes in the boxes/answer fields provided.
2. Once notes have been added, select 'Save and Exit' to add the notes to draft.

Note: Use the tab key on your keyboard or use the mouse to move from section to section.

Clinical Protocols - Alternative Method

If you want your practice/s to follow specific protocols, these can be configured with the assistance of an MWI Customer Product Consultant.

Selecting the 'Clinical' button will display a list of protocols.

Vet Consultation - Poppet	
Protocol	Description
Front of House Protocols	
Remote Consultation	Enter Remote Consultation Details
Consultation Protocols	
Nurse Consultation	Enter Nurse Consultation
Vet Consultation	Enter Vet Consultation
Default Protocol Category	
Default Protocol	Default Protocol

1. Select (double-click) the Protocol you wish to follow.
2. The Clinical Notes screen will load.
3. The user can now type clinical notes in the boxes/answer fields provided.
4. Once notes have been added, select 'Save and Exit' to add the notes to draft.

Note: Use the tab key on your keyboard or use the mouse to move from section to section.

Short Text

The screenshot shows the 'Remote Consultation - Poppet' interface. It features four main sections on the left: 'History & Symptoms', 'Problem List & Working Diagnosis', 'Treatment Plan (Remote)', and 'Remote Consult Outcome'. Each section has a large text area and a small icon. On the right, there are four 'Select' blocks, each with 'Answer' and 'Clinical Code' dropdown menus. At the bottom, a footer bar contains buttons: 'Back', 'Save and Back', 'Save and Exit', 'Exit', a date field '30/07/2025', a time field '15:49', a checked checkbox 'Enable User Short Text', and a 'Short Text' button.

When in Clinical notes you can enable Short Text. It is possible to enable or disable “Individual User Short Text Codes” for all users. For more on this see [Treatment Settings](#)

This screenshot is identical to the one above, showing the 'Remote Consultation - Poppet' interface. The 'Enable User Short Text' checkbox in the footer is highlighted with a red box, and the 'Short Text' button next to it is also highlighted with a red box.

1. Once Short Text is enabled, click on Short Text.

2. Enter the Name using a 4 letter limit.
3. Enter the Description. Paragraphing can be created by doing carriage returns (pressing enter) to create basic templates.

User Short Text

Search

Refresh

Delete

Name	Description
BAR	Bright Alert & Responsive
GA	General Anaesthetic: Pre-Med: Induction Agent: ET Tube: Pain Relief:

Save

Close

1. When entering the Short Text, type it and click on the space bar and the full description will display.

History

BAR

Examination

Bright Alert & Responsive

There is also the option to enable individual short text codes per user, instead of using the default shared library.

To turn this on, navigate to Administration > Settings > Treatment and enable individual short text codes. Once on each user will have a new blank library to build their own.

Saving Clinical Notes

Your notes will be saved into treatment draft. To save them to history, select the Save button.

The screenshot shows the 'Treatment' screen with a top toolbar. The 'Save' button, represented by a floppy disk icon, is highlighted with a red box. Other buttons in the toolbar include 'Save As Estimate', 'Save to Pre-Invoice', 'Empty', 'Delete', 'Doc Mgmt', 'Consent', 'Manual', 'Barcode', 'Clinical', 'Weight', 'Patient Lab', 'Formulary (F10)', and 'Send To'. Below the toolbar is a navigation bar with tabs: 'History', 'Pre-Invoice', 'Add Treatment', 'Prescriptions', 'Saved Estimates', 'Documents', 'Patients', 'Client Notes', 'Archive', and 'Health Care Plan'. The 'Add Treatment' tab is active. The main area contains a form for adding a new treatment, including fields for 'Item Date' (30/07/2025), 'MWI Pharmacy' (selected), 'Description' (History - Bright Alert & Responsive), 'Code' (General), 'Clinical Code' (General), 'Patient' (Poppet), and 'Surgeon' (Jamie Smith). A table below the form shows the draft item with columns: Date, Patient, Description, Clinical Code, Qty, Net, VAT, Total, Surgeon, Site, Grp, Computer, Modified, Modified By, and HCP. The table contains one row with the draft item.

Autosaving Clinical Notes to Drafts

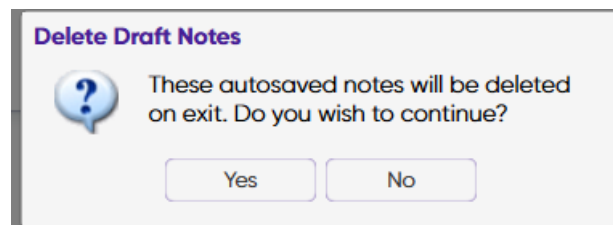
If the setting for autosaving clinical notes is enabled, the clinical notes will be saved at intervals. After the predefined time (normally 5 minutes) the notes will be autosaved. An indicator at the bottom of the screen will show that the note has been autosaved.

The screenshot shows the 'Default Protocol - Poppet' screen. It has a left sidebar with sections: 'History', 'Examination', 'Diagnosis', and 'Plan'. Each section has a text area for notes. The 'History' section contains the text 'OR Poppet has not been herself'. The 'Examination' section contains 'Swollen stomach and high temp'. The 'Diagnosis' section contains 'Eaten Christmas ornament'. The 'Plan' section contains 'Emetic SC and if unsuccessful, operate to'. To the right of each text area is a 'Select' button. At the bottom of the screen is a toolbar with buttons: 'Back', 'Save and Back', 'Save and Exit', 'Exit', a date field (30/07/2025), a time field (15:54), a checkbox for 'Enable User Short Text' (checked), a 'Short Text' button, and a red box containing the text 'Autosaved'.

The note will continue to be autosaved every 5 minutes. The session will remain open and the user logged in.

At any time the user can Save and Exit and the note will be appear as a draft in the Add Treatment Tab.

Before the note is autosaved, the user can press Exit. A warning will be displayed and, if they continue, the note will not be saved.



If a user does not interact with the clinical notes for an extended period (normally 4 hours) a warning message will be displayed asking them if they want to remain logged in. If they click Yes then the document will be autosaved again and the timer reset.

If they click No or do nothing, and no other interaction with the notes takes place, they will be logged out at the end of the normal session timeout. (i.e. If session timeout is 30 mins they will be logged out in approx 240 + 30 = 270 mins).

After being logged out, the user can log in and return to the autosaved notes. These are found in the Add Treatment tab for the patient. Autosaved notes have a different icon to normally saved notes. It is a disk with an exclamation mark.

Item Date

31/07/2025

09:49

Dispense from

Esher

MWI Pharmacy

Prescription

Description (search using a minimum of 2 characters)

Code

Clinical Code

General

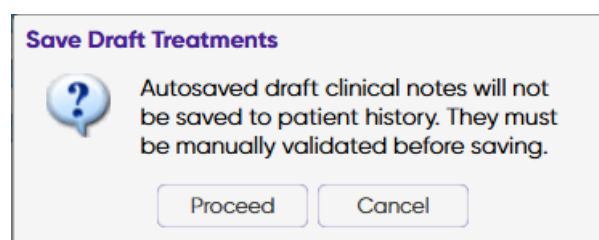
Patient

Poppet

Draft Items

<div></div>	Date	Patient	Description	Clinical Code	Qty	Net	VAT	Total
<div><div></div><div></div></div>	31/07/2025	Poppet	History - OR Poppet has not been herself	<div><div></div><div>General</div></div>	0	0.00	0.00	0.00
<div><div></div><div></div></div>	31/07/2025	Poppet	Examination - Swollen stomach and high temp	<div><div></div><div>General</div></div>	0	0.00	0.00	0.00
<div><div></div><div></div></div>	31/07/2025	Poppet	Diagnosis - Eaten Christmas ornament	<div><div></div><div>General</div></div>	0	0.00	0.00	0.00
<div><div></div><div></div></div>	31/07/2025	Poppet	Plan - Emetic SC and if unsuccessful, operate to	<div><div></div><div>General</div></div>	0	0.00	0.00	0.00

If the user tries to save autosaved draft notes to the patient history, a warning is displayed



If the user clicks Proceed, all the draft treatments in Add Treatment will be added to patient history, apart from any autosaved clinical notes, which will remain in draft.

The user can click on an autosaved draft note to edit it. After 5 minutes the note will be autosaved and the process continues as before. If the user exits the form using the window close icon [x] when creating a note, any autosaved draft note is deleted in the same way as happens when they use the Exit button. In edit mode using the close icon does not delete the autosaved note but displays a warning.

In any case, the autosaved note cannot be saved to the patient's history until it is manually saved.

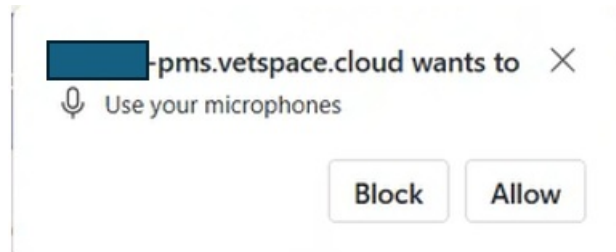
Speech-to-Text

If you are using a Google Browser, you can use your microphone to dictate clinical notes into the system.

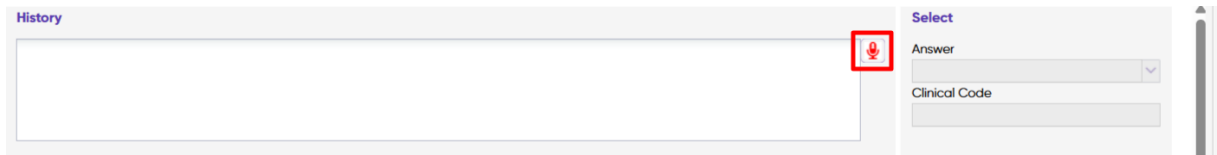
When adding clinical notes, you will see a microphone button for each question.

Using speech-to-text

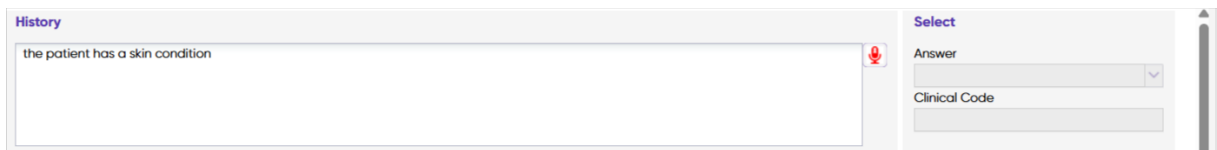
1. Select the microphone button.
2. On first use, select 'Allow' to the disclaimer message.



3. The microphone button will appear red to indicate voice recording is in process.



4. Once you have finished speaking, select the red microphone button to stop recording.
5. Your speech will then be converted into text.



6. Please check the text for accuracy before saving content into the patient's history.