



Vetech View

June 2009

(800) 677-8832

Volume 19, Issue 6



Client Communication - Creating Custom Notes

Inside:

Client
Communication

Humor

.....

**Our office will be
closed
@ 12:00 p.m.
Friday
July 3, 2009
For the 4th of July
Weekend!**



Need to get something in writing for a client? Advantage offers several options for this. We will go through a few of these in this month's article.

Communication through the Printed Invoice: Since the invoice is a very common way of communicating with clients, Advantage offers several options for adding information to invoices besides the actual invoice items and charges. Be aware that if you start using several of the invoice features at the same time, invoices may frequently require multiple pages to print.

Invoice Line Item Notes: When adding items to an invoice, the far right column for every line item is for adding any notes for that particular line. Invoice line notes are common to describe a particular item in detail. For instance you may have a generic code called "Injection" or "Misc. Lab Test". You can use the invoice line notes to add more detail to these items. These notes will automatically be posted to the patient transaction history. Optionally you can decide if you want these notes to post to the clients invoice and statement of account. Common invoice line notes can be pre-defined on the Lists/Invoice/Invoice Line Notes menu. Pre-defining notes will save time and allow you to enter complete notes quickly.

Invoice Notes: The lower left side of the invoice window allows you to enter an unlimited amount of notes that will print on the bottom of the clients invoice. These notes are associated with the invoice as a whole (not an individual line item) and post to the client transaction menu. Advantage also allows you to pre-define common invoice notes from the Lists/Invoice/Invoice notes menu so you can quickly import a saved note.

Future Appointments on the Invoice: Advantage makes it easy to automatically include future appointments on the printed invoice by simply selecting that option from the setup practice/Invoicing menu. If selected, any future appointments for the client will be printed on the invoice.

Reminders on Invoice: Similar to appointments on the invoice, there is a setup option to include a section on the printed invoice for patient reminders. If selected, all patient reminders will be printed on the invoice.

Thought for the day: Yesterday is not ours to recover, but tomorrow is ours to win or to lose.

Lyndon B. Johnson (1908 - 1973)



Estimate Notes: Typically a printed estimate includes special text to indicate “This is only an estimate..” and perhaps something like “Actual charges may exceed this estimate ... “. Often times an estimate requires a client signature to indicate their approval of the charges. This setup text along with the ability to rename the estimate title (to Treatment Plan, or Medical Plan for example) is located on the Lists/Invoice/Estimate Bottom note menu. You will also see the ability to configure estimates to automatically calculate a price range, rather than a fixed amount.

Communication through the Statement of Account: The statement of account is also a common tool for communicating with clients that have an outstanding balance. The statement of account allows you to have a different message depending on the age of the clients balance. To setup statement messages go to Lists/Invoice/Statement of account.. Note and enter your message. If you would like a single message, regardless of the client balance, it is easy to copy/paste your message to the other categories.

Humor

A man tried to sell his neighbor a new dog. "This is a talking dog," he said. "And you can have him for five dollars." The neighbor said, "Who do you think you're kidding with this talking dog stuff? There ain't no such animal."

Suddenly the dog looked up with tears in his eyes. "Please buy me, Sir," he pleaded. "This man is cruel. He never buys me a meal, never bathes me, never takes me for a walk. And I used to be the richest trick dog in America. I performed before kings. I was in the army and was decorated ten times."

"Hey!" said the neighbor. "He can talk. Why do you want to sell him for just five dollars?"

"Because," said the seller, "I'm getting tired of all his lies."

150 N. Wiget
Lane
Suite 211
Walnut Creek,
CA 94598

PHONE:
(800) 677-8832
(925) 932-5044

FAX:
(925) 932-5597

E-MAIL:
info@vet-
software.com



And you thought your job sucked

We're on the Web!

See us at:

www.vet-software.com