

# Transactions

## Introduction

Most work done on an animal can be grouped together based on the case, all work for the RTA is related, the broken leg etc. you can get the system to maintain this for you.

## Steps

There are three main parts of a transaction:

**Start a new transaction** - you can have as many different transactions active on any one animal, some are short - e.g. express anal gland, to long term cardiac murmur to medium term say a broken leg where there will be a few follow up consultations. So you need to ability to **Add to existing transaction**.

Then once you are happy with the outcome you need to **End a transaction**

Transactions can span multiple days (years even) - the system will keep track of which ones are active and report on it accordingly. As such you should remember to always 'end' the transactions when you are happy you will not see the animal again for the same reason.

With many of the transactions you may want to process an insurance claim form or in the case of emergency treatment printout the work for another clinician. So we need to ability to **List all transactions** (open or closed).

## Controlling a transaction (Manually)

There is a way to get the system to prompt you automatically at various points in the system to start/add/end transactions, however, initially lets look at manually calling them. It also has the advantage of creating a set of procedures that allow you to override the automatic routines when they are used later.

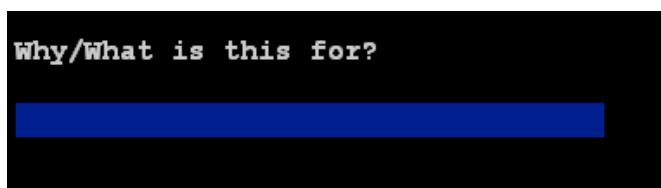
We have provided a set of clinical scripts that will do the basics for you, before looking at changing them lets look at what you can do.

Create an AP procedure

- \* Called **Start a Transaction**,
- \* Give it the code **tranad**,
- \* If you have an Admin analysis code use that
- \* Most importantly add to to the extra's line: `^33=1 ^37=tranadd`

Now try it, access a record card, Clinical screen, 'A'uto and enter `tranad`

You will be asked for the a description,



enter here a brief note as to what the transaction relates to.

This will add a clinical line, starting NT: followed by the description you entered<sup>1</sup>. It will also start the transaction, all work entered on this card will be marked as being part of the same transaction. If you exit to the main menu or jump to a different animal the transaction will be re-set.

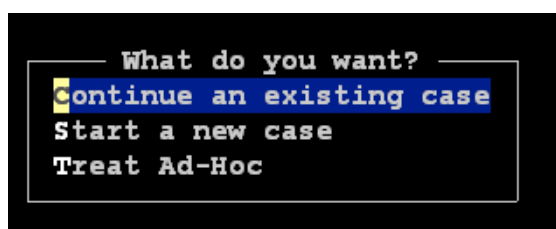
Anytime you want to start a new transaction just use the 'tranad' code.

You can also add a code that calls `^37=tranaget` that will list the open transactions and allow you to add more work. However, lets look at a different method - it would be easier to have just one AP code that allows you to add a new transaction, add to an existing one or in the case of a counter sale not even start a transaction.

### Create an AP procedure

- \* Called **Start / Add to a Transaction**,
- \* Give it the code **tranu**,
- \* If you have an Admin analysis code use that
- \* and most importantly add to to the extra's line: `^33=1 ^37=tranask`

Now try it, access a record card, Clinical screen, 'A'uto and enter `tranu`



<sup>1</sup> This can be changed in the script later if required.

If you select 'Start a new case', you will be asked for details and it will be the same as the earlier, 'tranad' example.

If you select 'Continue an existing case', the system will list any open cases, (if none exist you have the choice to add or quit) - select the case you want and the work entered will be allocated to it.

The 'Treat Ad-Hoc' option can be used to enter admin text, counter sales etc.

Finally in this section, let finish off a transaction:

### Create an AP procedure

- \* Called **End a Transaction**,
- \* Give it the code **trane**,
- \* If you have an Admin analysis code use that
- \* Suppress the multiplication factor
- \* and most importantly add to to the extra's line: `^33=1 ^37=tranend`

As we are using `^33=1` nothing will appear on the screen (remove it and details will be added) - it is a good idea to add **trane** to the extra's line on ANY AP copy that 'finishes a transaction.

## Manual Summary

Using just two AP codes, **tranu** and **trane** we can start and end a transaction.

**Tip:** If you change the tranu AP code and use `^37=tranvn` then this will do the same except it will force the operator to enter a User ID. (There are ways to limit the script to only Clinician and Veterinary Nurses - that is covered in the main manual).

Using these code we called these clinical scripts:

|             |                            |
|-------------|----------------------------|
| tranask.pro | Add/Continue a Transaction |
| tranadd.pro | Add a transaction          |
| tranend.pro | End a transaction          |

We will use the script name(s) in the following section.

If you do decide to customize any then it is strongly recommended you make a COPY of the file - edit the copy and use that. The main reason for this is we may make changes to the master copy and it will be over written on a future upgrade.

For this discussion document we will stick with names here, please adjust as necessary for your specific situation.

## Automatically Tracking a Transaction

Rather than having to remember to enter AP codes, we can get the system to call scripts at various points.

The table below lists the current points:

| Name   | Entry point where called   |
|--------|--|
| pva001 | Entering Auto Pricing  |
| pva002 | Entering Clinical Screen   |
| pva003 | Adding to Waiting Room List from record card                                       |
| pva004 | Just BEFORE Estimate generated.  |
| pva005 | Just AFTER an estimate generated   |
| pva006 | Just before MR prompt Line appears   |
| pva007 | Enter 'A'uto for the 1st time on this animal                                       |
| pva008 | Finished with AP   |
| pva009 | Entering text box  |
| pva010 | Before 'C'ash options  |
| pva011 | Before 'A'uto and 'T'ext and 'C'ash (same as 007, 009)                             |
| pva012 | As 007 except only active if estimate being generated.                             |
| pva013 | If user selects 'T'ransaction on clinical listing option present and will call it. |

Work out where you want to start - most people use **pva011** as it does not matter if the user uses 'A'uto, 'T'ext or 'C'ash.

There are two step, initially you do need to add a params.txt entry to enable the automatic calling of scripts. This can be fine tuned, for the time being, we will enable them all via:

**Main Menu**  
**General Applications**  
**Parameters**  
**Text Files**  
**Params.txt**

Add **Call\_Protocol = \***

Now we need to copy the script to the name, the example below will use the 'Add/Continue a transaction' (tranask.pro) and have it appearing when any work is going to be entered - will use pva011.

Press **F6** to get to the Vet> prompt  
Type: **cd protocols**  
Type: **copy tranask.pro pva011.pro**  
Type: **exit** to get back to where you left off.

Now log in/out and when you pick either **auto**, **text** or **cash** then the script should appear automatically.

That will start the transaction, use **trane** to end it.

## **Listing Clinical Work**

There is an Clinical History option (**Clinical Screen -> Reports**), option 23, this will prompt you for the transaction required and currently will list the details on the screen. This option will be expanded in the future to send the report directly to the Insurance provider.

The other option you can use is the **Clinical -> List** option to ask for the transaction to display.

There is one sample, **tranlist.pro**, you should copy this to **pva013.pro** as with the Automatic option above. This will cause the system to add a new option to:

**Clinical -> List** option called '**Transactions**'.

When selected this script will be called, it defaults to ALL transactions, select as needed and the work will be displayed.