



Animal Dental Chart
for Dogs and Cats

User Guide

Version 12.0.0.8

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Introduction to ADC

The **ADC** application can be very easily installed in exactly the same way on each PC computer or device in your practice, with no need to set up a complicated local area network with a local server and workstations.

The **ADC** application will connect each PC computer or device using end-to-end encryption of data to world class servers over the web. This means data transmitted to and from the servers has the leading world standard of encryption, and could not be read if it was ever intercepted.

Your data is automatically synced to very secure, enterprise class co-location servers over the web. This also ensures your data protection as the servers do daily back-ups that are copied at two separate locations with world class biometric security.

This same level of security applies to the online portal that was automatically created for your **Practice** when your registration was approved. The online portal gives your **Clients**, as well as **Referring Vets** if applicable, access to their own **Patient(s)** select medical records. For more information on the portal, please see [Practice Portal](#).

ADC can also be run on any non-PC hardware.

You can use the **Microsoft Remote Desktop®** app for Apple®, Android®, and Chromebook® devices. This free app can be easily downloaded from the Mac App Store for Apple® devices such as iPads® or iPad Pros®, or from Google Play® for Android® or Chromebook® devices. The app can be installed on any of these devices, and then can be set-up to launch **ADC** using **Remote Desktop Licenses**.

You can also go to the URL **app.animaldentalchart.com** to connect to **ADC** through **RDWeb** for Apple®, Android®, and Chromebook® computers and laptops. This is also using **Remote Desktop Licenses**.

When using **Remote Desktop Licenses**, **ADC** is running directly on our servers with the same level of world class data security. All updates are done automatically at the servers for any new versions of **ADC**.

PC Installation

1. After your practice is approved, you will receive a **Welcome e-mail** inviting you to download **ADC**. This e-mail will contain your **Practice Name**, **Registration Key**, **Subscription Type**, **Subscription End Date**, **E-mail Address**, and **Password**. You will need these credentials when installing and logging into **ADC**.

Important Note

Please keep these credentials in a safe place either by copying them to a Notepad® or Word® document, or alternatively printing them to retain a hard copy. As the Registration Key and Password credentials are unique to each Practice, these credentials must not be shared by another practice as this would give full access to the same database, an illegal breach of medical privacy and confidentiality.

2. Select the **Download** button within the e-mail to download **ADC**. This saves the ADC.msi file to your Download folder on your computer or device.

Important Note

Windows 11® in S mode exclusively runs apps from the Microsoft Store. As the ADC app is not available from the Microsoft Store, you'll need to switch out of S mode.

On your computer or tablet running Windows 11® in S mode, open **Settings > System > Activation**.

In the "Switch to Windows 11 Pro" section, select "Go to the Store". If you also see an "Upgrade your edition of Windows" section, be careful not to select the "Go to the Store" link that appears there.

On the "Switch out of S mode" or similar page that appears in the Microsoft Store, select the "Get" button. After you see a confirmation message on the page, you will be able to install ADC.

3. Select the ADC.msi file to install **ADC** to the local hard drive for each PC computer or device. The **ADC Setup Wizard** interface will open and will guide you through the necessary steps to install **ADC** on your PC computer or device. Select **Next** to continue the installation.

4. A **Select Installation Folder** interface opens. The usual folder to install to is:

C:\Program Files\ADC

On this page a prompt is also displayed as follows:

To install in the folder, click “Next”. To install to a different folder, enter it below or click “Browse”.

Select **Next** to continue the installation.

5. A **Licence Agreement** interface opens. Please review the **END USER LICENCE AGREEMENT** and select **I agree** in order to continue the installation.
6. Copy and paste or key in your unique **Registration Key**, found in your **Practice’s Welcome e-mail**.
7. One of the following two interfaces will open:

Do you want to allow the following program to install software on this computer?

Program name: ADC.msi
Verified publisher: Animal Dental Chart Inc.
File origin: Downloaded from the Internet

OR

Do you want to allow this app to make changes to your device?

ADC.msi
Verified publisher: Animal Dental Chart Inc.
File origin: Hard drive on this computer

Select **Yes** to continue the installation.

The **ADC** application will finish installing and place a dog and cat **ADC** icon on your desktop.

8. Select the **ADC** icon on your desktop to launch the **ADC** application. Use the **E-mail Address** and **Password** from your **Welcome e-mail** to login to **ADC**.
Each user must enter his or her unique **E-mail Address** and **Password** to open **ADC**. Please see [Practice Users](#) for information on adding users to **ADC**.

9. For each Windows® PC based computer or device in your practice, go to the link <https://portal.animaldentalchart.com/Home/Downloads>. Select the **Download** button, and save the ADC.msi file to the Download folder, then install **ADC** for each computer or device using your unique **Registration Key** for the **Practice**.

Important Note

The original launch of any version of ADC may take about a minute as the application is being configured, depending upon your internet connection speed. A notice will be displayed, Configuring your application. After the first launch, ADC opens much faster.

Forced Upgrade

After ADC is installed the first time, forced upgrades to new versions are very easy.

After signing in to **ADC**, if a forced upgrade of a new version of **ADC** is available, the following ADC Notice will be displayed:

A new ADC version has been released. You must upgrade to this version now.

If you wish to view the new features in the new version before the upgrade, select **Release Notes**.

Important Note

Release Notes can also be viewed once the new upgrade is complete by selecting the Help icon on the bottom taskbar and scrolling down to Release Notes.

To proceed with the upgrade, select **OK**.

The current version of **ADC** will be uninstalled and the new version of **ADC** will be installed automatically. After the new version is installed, you will be brought back to the LogIn screen.

Optional Upgrade

If an optional update is available, after signing in to **ADC** the following ADC Notice will be displayed:

An optional update is available for the ADC application. Would you like to install it now?

Select **Yes** if you wish to perform an update at that time.

The current version of **ADC** will be uninstalled and the updated version of **ADC** will be installed automatically.

After the updated version is installed, you will be brought back to the Login screen.

Select **No** if you wish to continue using **ADC** and install the update later. You will then be prompted with the same message that an optional update is available each time you sign in to the **ADC** application until the optional update is installed.

Manually Uninstalling ADC from a PC

Important Note

With any upgrade, you normally DO NOT need to manually uninstall the current version of ADC prior to installing the new or updated current version. The current version is automatically uninstalled prior to automatically installing the new version or updated current version.

The only time you will need to manually uninstall the current version of ADC is if there are problems preventing your installation of a new or updated current version. If you do encounter problems, please follow the steps listed below.

It is very important to note that since the application is web-based, all of the data for your Practice is kept on enterprise class co-location servers. There is world class security for your data, and none will be lost by uninstalling the application.

1. Go to your Windows Explorer and open the ADC.msi file location. This file is most commonly saved in your **Downloads** folder. Touch and hold or right click on the old ADC.msi file, then select **Delete** from the dropdown list.
2. For **Windows 7®** users, select the **Windows® icon** on the lower left taskbar to open a **Search programs and files** dialogue box. Start entering the word **programs** and select the **Programs and features** folder to view the list of programs installed on your computer or device. Select **ADC** on the list, then select **Uninstall** from the menu. The program will prompt you with **Are you sure you want to uninstall ADC?** Select **Yes** to complete the uninstall.

For **Windows 8®** users, select the **Windows® icon** on the lower left taskbar to open the Windows® Start Page. Select the **Control Panel** icon. Then select the **Programs and features** folder to view the list of programs installed on your computer or device. Select **ADC** on the list, then select **Uninstall** from the menu. The program will prompt you with **Are you sure you want to uninstall ADC?** Select **Yes** to complete the uninstall.

For **Windows 10 or 11®** users, in the **Type here to search** dialogue box on the left corner of your taskbar, enter the word **apps**. Select the **Apps & features** folder, opening the list of applications installed on your computer or device. Select **ADC** on the list, then select **Uninstall**. A prompt is then displayed, **This app and its related info will be uninstalled**. Select **Uninstall** from within the dialogue box.

3. To install the new or updated current version of **ADC** please open the link:
<https://portal.animaldentalchart.com/Home/Downloads>.
4. Select the **Download** button to save the ADC.msi file to your **Downloads** folder.
5. Then please refer back to the **Installation** section of this **User Guide** and follow steps 3 through 7 to complete the installation.

Important Note

Steps 1 through 5 must be done for every computer or device that the ADC application is installed on in your Practice.

Remote Desktop License Installation for non-PCs

a) Apple® Devices (iPads®, iPad Pros®)

1. Go to **App Store** to download and install the free **Microsoft Remote Desktop®** application. This will add an **RD Client** icon to your screen.
2. Launch the **RD Client** app on your device.
3. Select **Workspaces** on the bottom taskbar.
4. Select the “+” on the navigation bar, then select **Add Workspace**.
5. For **E-mail or Workspace URL**, enter <https://app.animaldentalchart.com>.
6. Select **Ask When Required** for **User Account**.

7. Select **Add User Account**, and enter the **Remote Desktop License Name** and **Password** that were sent to you in your **Welcome e-mail** from **ADC** for each **Remote Desktop License**. You have the option of entering a **Friendly Name**. Then select **Save**.
8. Select **User Account**, then for **Add Workspace** select **Next**. This will create an **ADC** icon under **Work Resources**.

Important Note

Steps 4 to 8 need to be repeated for each additional Remote Desktop License.

9. Select the **ADC** icon for the **Remote Desktop License** you wish to use under **Work Resources** to launch the **ADC** app.
10. The **ADC** app launches in landscape mode. Select the **RD Client** icon in the center of the upper toolbar, then select the **Touch** icon to allow touch navigation of **ADC**.
11. For the **Settings** wheel on the upper toolbar, check that **ON** is selected for **Enable Input Method Editor**.

b) Android® Devices (Tablets)

1. Go to **Google Play** to download and install the free **Microsoft Remote Desktop®** application. This will add an **RD Client** icon to your screen.
2. Launch the **RD Client** app on your device.
3. Select **Workspaces** on the bottom taskbar.
4. Select the "+" on the navigation bar, then select **Add Workspace**.
5. For **E-mail or Workspace URL**, enter <https://app.animaldentalchart.com>, then select **Next**.
6. Then select **Ask When Required** for **User Account**.
7. Select **Add User Account**, and enter the **Remote Desktop License Name** and **Password** that were sent to you in your **Welcome e-mail** from **ADC** for each **Remote Desktop License**. You have the option of entering a **Friendly Name**. Then select **Save**.
8. Select **User Account**, then for **Add Workspace** select **Next**. This will create an **ADC** icon under **Work Resources**.

Important Note

Steps 4 to 8 need to be repeated for each additional Remote Desktop License.

9. Select the **ADC** icon for the **Remote Desktop License** you wish to use under **Work Resources** to launch the **ADC** app.
10. The **ADC** app launches in landscape mode. Select the **RD Client** icon in the center of the upper toolbar, then select the **Touch** icon to allow touch navigation of **ADC**.
11. For the **Settings** wheel on the upper toolbar, check that **ON** is selected for **Enable Input Method Editor**.

c) Apple®, Android®, and Chromebook® Computers and Laptops

1. Open an internet browser and enter the URL **app.animaldentalchart.com** to launch the **RDWeb** interface.
2. For **User name** and **Password**, enter the **Remote Desktop License Name** and **Password** that were sent to you in your **Welcome e-mail** from **ADC** for each **Remote Desktop License**, then select **Sign in**.

This will create an **ADC** icon under **Work Resources** to launch **ADC**.

Save the **User Name** and **Password** so that they will autofill the next time you launch the URL **app.animaldentalchart.com**.

Important Note

Steps 1 and 2 need to be repeated for each additional Remote Desktop License.

3. Select the **ADC** icon under **Work Resources** for the appropriate **Remote Desktop License** if there is more than one to launch the **ADC** app.
4. For the **Settings** wheel on the upper toolbar, check that **ON** is selected for **Enable Input Method Editor**.

Practice Portal

When your **Practice** was approved to use the **ADC** application an online portal was automatically created for your **Practice**. The online portal gives your **Clients**, as well as **Referring Vets**, if applicable, access to his or her own **Patient(s)** select medical records.

Important Note

Clients and Referring Vets, if applicable, cannot view the entire Patient Medical History. It is select medical records based on their Role Permissions. To view what those Role Permissions are and how to change them, please see [Role Permissions](#).

Access to this online portal is granted by sending a **welcome e-mail** to either the **Client** or **Referring Vet**. This email will contain a link to your online portal as well as a randomly generated password from the server that can be used in conjunction with their e-mail address to login. Please see [Client welcome e-mail](#) and [Referring Vet welcome e-mail](#) for more information on how to send a **welcome e-mail**.

The **Referring Vet** can also add **Patient Medical History** files on your portal for any **Patient** he or she has referred to your **Practice**. This first requires that the **Patient** is added to **ADC** in your **Practice**, and the **Referring Vet** be assigned to the **Patient**.

If a **Client** or **Referring Vet** forgets his or her password, s/he can select the **Forgot password** on your online portal login page. A new **Welcome e-mail** will then be sent to the **Client** or **Referring Vet** with a new randomly generated password.

Important Note

It is recommended that all Referring Vets from the same Practice be assigned the same e-mail address when being added into ADC. This will allow access to all Patients from that hospital using the same login information.

Set-up

When the **Home** page opens, select the **Settings** wheel icon on the right side of the header.

Under the **Settings** wheel icon there is a dropdown list as follows:

My Account
Practice Settings
Medical Record Templates
Practice Users
Remote Desktop License(s)
Role Permissions
Import Data
Log Off

a) My Account

From the **Settings** dropdown list, select **My Account**. Verify the information you entered in your registration is correct and send an e-mail to support@animaldentalchart.com if any corrections are necessary.

Choose a **Theme** from the dropdown list if you wish to change the appearance of the display. This gives a list of color themes to choose from for the look of **ADC**. Then select **Save**.

b) Practice Settings

1. From the **Settings** dropdown list, select **Practice Settings**.
2. Select which **Patients** are seen in your practice. Select **Dogs, Puppies, Cats, Kittens** or **Cats and Kittens only**.
3. The Practice member who signs up for the **ADC** application is designated the **Practice Director** and is set as the **Default Vet** for the medical records. The **Practice Director** has the highest level of permissions within the **ADC** application.

Important Note

If it is not a veterinarian that registered the **ADC** application, this will need to be changed. The **Default Vet** may be changed after **Practice Veterinarians** are added. For more information, please see [Practice Users](#).

4. Upload your own practice logo in jpg format, or use the generic paw practice logo.
5. Select **Preferred Body Weight, Temp,** and **Date Format** for the practice.
6. Select if you are **Accepting Patients from Referring Vets.**
7. The **Anesthetic Quick Drug Calculator** can be customized to your preference. There are three options:

Download/Edit File

View the Excel file currently in use. To make any changes, edit the spreadsheet and select Save for the edited file to be store on your local drive.

Upload Edited File

Upload the edited Excel file from your local drive.

Reset Default File

Reset the edited Excel file to the Default Excel file for ADC.

8. Select how you wish to search for the **AVDC Abbreviations** for the **Diagnosis** and **Procedures** for both the **Dental Charts** and the **Bone and Soft Tissue Charts**. Select searching by using a **First Character Match** or an **Any Character Match** for the **Abbreviation** and also for the **Medical Description**.

The default setting for the search for the **AVDC Abbreviations** is by using an **Any Character Match**.

9. Select if you wish to **Record Plaque and Calculus Index Range for All Four Quadrants** in your **Dental Charts**.
10. Select if you wish to **Record Measurements for Dental Charts** as either **PAL** and **PPD** or **PPD** and **GR/E**.

PAL = clinical **periodontal attachment loss** measured in mm from the cementoenamel junction to the base of the pocket on probing

PPD = clinical **periodontal probing depth** measured in mm from the free gingival margin to the base of the pocket; may be greater than the actual pocket depth if there is a diseased epithelial attachment

GR/E = clinical measurement in mm from the cemento-enamel junction to the free gingival margin as a negative number for GR (**gingival recession**), and as a positive number for GE (**gingival enlargement**)

Select the **View Image** button to see an example of measuring **PAL**, **PPD**, and **GR/E**.

11. For **Record Stages/Index for Dental Charts** select none or up to 3 of the following:
Furcation Exposure
Mobility
Gingivitis Index
12. By default, the **# of Recent Records to Display** is set to 9. This can be changed to any number from 0 to 99.
13. The **Audit Log** gives a listing along with each version of each medical record for each patient in pdf format that are date/time stamped and digitally signed by the server.

The **Audit Log** access is set by default to the **Practice Director**. This displays the **Download Audit Log** button in **Patient Medical History**. The **Practice Director** can select any other **Practice Users** s/he wishes to give access to the **Download Audit Log** button.

14. **Record Locking** can only be changed by the **Practice Director**.

By default, **AutoLock Days** is set to 30 and **Record Lock** is checked for each **Medical Record** type so that editing can be done for omissions or errors up to 30 days after a **Medical Record** type is created.

The **Practice Director** can unlock a **Medical Record** type by changing the **Autolock Days** to zero, and selecting **Reset** on the same line for the **Medical Record** type. Each one of the selected **Medical Record** types will then be able to be edited for omissions or errors.

In order to set a new **Autolock Days** for each **Medical Record** type, enter the number of days, and then select **Reset** on the same line for the **Medical Record** type. We recommend using the same number of **Autolock Days** for each **Medical Record** type for consistency.

If the **Practice Director** unchecks a **Record Lock** checkbox for any **Medical Record** type then selects **Save** at the bottom of the page, all of the **Medical Record** types created from that time onward will be unlocked.

Important Note

Once a lock has been removed from a **Medical Record** type and any editing has been done to the **Medical Record** for omissions or errors, we recommend setting a new **Autolock Days** to 30, then selecting **Reset** on the same line as the **Medical Record**.

15. In the field beside **Customizable Text For Client Welcome E-mail** you can edit the text to your own preference for your **Practice**.

Select **View Welcome E-mail** button to see the template of the e-mail that will be sent from the server to your **Clients** to welcome them to view selected parts of their own **Patients'** medical records online.

16. In the field beside **Customizable Text For Referring Vet Welcome E-mail** you can edit the text to your preference for your **Practice**.

Select **View Welcome E-mail** button to see the template of the e-mail that will be sent from the server to your **Referring Vets**. This will welcome them to view selected parts of their referred **Patients'** medical records online, as well as upload **Patient Medical History** for **Patients** they are referring.

17. Please make any changes to the **Practice E-mail Address** as needed.

18. Select **Save** to update all of your **Practice Settings**.

c) Medical Record Templates

From the **Settings** dropdown list, select the **Medical Record Templates** to view, edit, or create templates for the **Consultation, Recheck, Master Problem List, Hospital Flowsheet and Notes**, and **Case Summary**.

For each of the medical record types previously listed there are 3 ways to generate a **Medical Record Template**, allowing for flexible customization for each **Practice**.

Option 1

The first option is to use or edit the provided **Templates**.

Select the **Template Type** to view the provided **Templates**. You have the option to edit any changes to each **Template** to use for your **Practice**, then select **Save**.

Option 2

The second option is to use your **Practice's** existing text or table **Templates**.

Select **Template Type**. Then select **Add** and enter a new **Template Title**. Copy and paste an existing document containing text, tables, or images or a combination of text, tables, and images for your **Practice** into the field below.

An example of an image that can be pasted into the **Template** is a jpg image of a handwritten signature that has been inserted into a Word® document.

Go to the end of the last text entry and hold down the Delete key for a few seconds to remove any invisible formatting characters that can cause errors when printing the **Medical Record**.

Then select **Save**.

Option 3

The third option is to create your own templates by direct entry in the field below.

Select **Template Type**. Then select **Add** and enter a new **Template Title**. Enter the new template directly in the field below, then select **Save**.

An unlimited number of templates can be created for each **Template Type**. You may wish to create different **Consultation** and **Recheck Templates** for canine and feline patients. You also may wish to create different **Case Summary Templates** for oral surgery, periodontics, endodontics, restorative dentistry and prosthodontics, and orthodontics. **Discharge Summary Templates** are created for **Clients** to explain in lay terms the diagnostics or procedures that have been done or are planned for the future for their pet.

Once you create more than one **Template** for a **Template Type**, select the **Template Title** from the dropdown list.

For the **Consultation, Recheck, Hospital Flowsheet and Notes, Case Summary, and Discharge Summary Templates** you have the option of inserting any of the following **Template Tags** into the text from the following dropdown list:

[Patient First Name]
 [Patient Last Name]
 [Species]
 [Breed]
 [Color]
 [Date of Birth]
 [Sex]
 [Referring Vet Title]
 [Referring Vet First Name]
 [Referring Vet Last Name]
 [Referring Vet Practice Name]
 [Referring Vet Practice Address]

Select the **Template Tag** from the dropdown list, place your cursor at the location on the page to insert the **Template Tag**, then select the **Insert Tag** button. An unlimited number of **Template Tags** can be added to each **Template**.

The **Template Tags** will be autofilled when opening any of these five **Medical Records** for editing.

d) Practice Users

From the **Settings** dropdown list, select **Practice Users**.

The **Practice Director** is set as the Practice member who registered the **Practice** for **ADC**.

Important Note

The Practice Director has the highest level of permissions within the ADC application. By default, the Practice Director is also set as the Default Vet within your Practice. If the person who registered as the Practice Director is not a veterinarian, please select the Default Vet once Practice Veterinarians have been added as Practice Users.

If there is a **Practice Manager**, the **Practice Director** should add this person as a **Practice User**.

After a **Practice Manager** is added, both the **Practice Director** and **Practice Manager** can add or edit **Practice Users**.

If there is no **Practice Manager**, then the **Practice Director** is the only one who can add or change **Practice Users**.

Enter all the **Practice Users** – additional **Practice Directors** if there are practice partners, **Practice Veterinarians**, **Veterinary Technicians**, and **Receptionists**.

After each user is added, an e-mail will automatically be sent to each new user to his or her e-mail address with a randomly generated, unique **Password**. Each user must enter his or her unique **E-mail Address** and **Password** to login to **ADC**.

Add a Practice User

From the **Settings** dropdown list, select **Practice Users**.

Select **Add** on the **Practice Users** page.

A **Title** can be selected from the buttons available, or else select the **Other** button and **Enter Other Title** will be displayed. The freeform entry gives unlimited options.

If no **Title** is selected or entered, this will default to no **Title**.

Enter the first and last name of the **Practice User**.

Enter an e-mail address for the **Practice User**.

Important Note

This must be a unique e-mail address for the Practice User as this e-mail address will be linked to a unique, randomly generated password from the server. This e-mail address and password will be used for this Practice User to login to ADC.

Select a **Role** from the options listed. This will set this **Practice User's Role Permissions**.

Leave the **Send welcome e-mail** box checked, then select **Save**. This will send an e-mail from the server to the new **Practice User** with his or her own unique **Password**.

Each user must enter his or her unique **E-mail Address** and **Password** to open **ADC**.

Add all the additional **Practice Users** – additional **Practice Directors** if there are **Practice** partners, **Practice Veterinarians**, **Veterinary Technicians**, and **Receptionists** the same way.

e) Remote Desktop License(s)

Important Note

The Remote Desktop Licence(s) can only be viewed by the Practice Director or Practice Manager.

From the **Settings** dropdown list, select **Remote Desktop License(s)**.

Each **Remote Desktop License Login Name** will be displayed. There is the option to select the **Reset Password** icon for a **License** if there is a problem with launching **ADC** for that **License**.

Also, the number of **Remote Desktop License(s)** can be increased or decreased as required by selecting **Add/Remove License(s)** button. This opens an **ADC Notice** that displays the **Number of Current Licenses(s)**, and the **Number of Licenses Required** can be selected from a dropdown list.

When **Save** is selected, the following **ADC Notice** is displayed:

Your changes have been saved.

If you added Remote Desktop License(s) they will be available shortly, and you will be invoiced for them.

If you decreased Remote Desktop License(s), they will be decreased at the start of the next invoice period.

An updated list of **Remote Desktop License Login Names** will be displayed shortly.

If you added one or more **Remote Desktop Licenses**, an e-mail will automatically be sent to the **Practice Director** who registered **ADC** to give an updated list of **Remote Desktop License Name(s)** and **Password(s)**.

f) Role Permissions

Important Note

The Role Permissions can only be changed by the Practice Director.

From the **Settings** dropdown list, select **Role Permissions**.

The **Role Permissions** have default settings. These settings can be changed by the **Practice Director** to whatever s/he prefers for a **Practice Manager**, **Practice Veterinarian**, **Veterinary Technician**, **Receptionist**, and **Referring Veterinarian**.

g) Import Data

1. From the **Settings** dropdown list, select **Import Data**.
To learn how to import **Client** and **Patient** data from other applications, select http://animaldentalchart.com/import_data.
2. Select **Import Type** from the dropdown list as Avimark® CSV, Cornerstone® XLS, or ImproMed® SQL.

You can import both **Client** and **Patient** information from these other practice management applications into **ADC** to save having to manually enter this information.

After the **Import Data** is done for any other practice management application, an e-mail is automatically sent to your **Practice** from the server that details the status of the imported data to **ADC**.

Avimark® CSV

For Avimark® CSV, select the **Browse** button to find the csv file on your computer or device, and select the file.

Select the **View Required Import Format** link. Then open your csv file in Word Excel® to confirm it is in this format with exactly the same headings for the columns from left to right before importing the data.

Then select the **Import Data** button to update the database for the **ADC** application.

Cornerstone® XLS

For Cornerstone® XLS, select the **Browse** button to find the xls file on your computer or device, and select the file.

Select the **View Required Import Format** link. Then open your xls file in Word Excel® to confirm it is in this format with exactly the same headings from left to right for the columns before importing the data.

If the date format in **Cornerstone®** is not the same as the date format selected for **ADC**, this does need to be changed in **Cornerstone®** prior to importing the data.

Then select the **Import Data** button to update the database for the **ADC** application.

ImproMed® SQL

For ImproMed® SQL, enter the **Server Name** and select **Authentication** from the dropdown list.

For the SQL Server **Authentication**, enter the **Login** and **Password**, then select **Connect**. Select the **Database Name** from the dropdown list, and select **Import Data**. This **Authentication** should be used on a computer or device that does not have the ImproMed® SQL Server on it.

For the Windows Server **Authentication**, the **Login** and **Password** are automatically entered. Select **Connect**. Then select the **Database Name** from the dropdown list and select **Import Data**. This **Authentication** should be used on a computer or device that has the ImproMed® SQL Server on it.

The entries in the fields for ImproMed® SQL are saved as defaults to make it easy to do updates to your database.

h) Log Off

Select **Log Off** to exit the **ADC** application.

Using the ADC Application

The **ADC** application opens on the **Home** page. This header will include **Referring Veterinarian** if **Yes** is selected for **Accepting Patients from Referring Vets** under **Practice Settings**.

You can return to the **Home** page by selecting the **Home** logo on the lower taskbar.

1. Client

On the **Home** page select the **Client** tab to open the **Client** page. Once the **Client** page is open there will be a search box and 3 buttons displayed: **Search**, **Add**, and **Refresh**.

a) Search

To search for a **Client** tile in the database, enter one or more of the first letters of the **Client's** last name in the search box, and select **Search**.

This will display all **Clients** with a last name that matches the letter or letters in descending alphabetical order.

To display all the **Clients** in the practice by their last names in descending alphabetical order, leave the search box blank, and select **Search**.

To display more **Client** tiles per page, move the **Columns Count** slider to the right.

b) Add

1. To enter a new **Client**, select the **Add** button.
2. A **Title** can be assigned for each **Client** by selecting one of the buttons at the top of the **Client** page. The **Other** button can be selected and **Enter Other Title** will be displayed.

This allows a freeform entry of any titles such as "Mr. and Mrs." when both **Clients** sharing the same **Last Name** and share ownership of the **Patient**.

If there are two **Clients** with different **Last Names** for a **Patient**, enter one **Client's First and Last Name**, and the second **Client's First Name** in the **First Name** field. Then enter the second **Client's Last Name** in the **Last Name** field.

The second **Client** would be chosen if this person most responsible for the **Patient**. For example, enter John Smith and Betty White as John Smith and Betty in the **First Name** field, and White in the **Last Name** field.

The freeform entry gives many other options such as designating a member of the police, military, or royalty, or giving a religious title. There are unlimited options for **Titles**.

If no **Title** is selected or entered, this will default to no **Title**.

3. Enter a **Phone** number and **Alternate Phone** number if applicable for the **Client**. After entering the phone number in each field, you can add an extension if applicable. You can also add a note whether a number is home, work, or cell, and who the number belongs to, such as "Betty's cell".
4. Enter an e-mail address for a new **Client**. If it is already in use, an ADC Notice will be displayed: **Sorry, this e-mail address is in use by [Name]**. If the **Client** does not have an e-mail address, leave this field blank.
5. An **Alert** can be added for each **Client** by selecting the checkbox beside **Display Alert**, then entering the description of the **Alert** in the text box.

After selecting the **Save** button, a red exclamation mark icon will appear beside the **Patient** name in all **Medical Record** tiles for all **Patients** for this **Client**. If you mouse over the icon, the description of the **Alert** will be displayed following a description for a **Patient Alert** if one has been added.

A **Client Alert** will also display in the **Patient Medical History, Consultation, or Recheck** for a **Patient**. The description of the **Alert** will be displayed below the **Client** and **Patient** dropdown list, the **Client Alert** will follow a description for a **Patient Alert** if one has been added.

If the **Alert** no longer applies to the **Client**, open the **Client** menu option, select the **Edit** icon for the **Client**, and then unselect the checkbox beside **Display Alert**.

6. By selecting the checkbox for **Send welcome e-mail**, then when you select **Save** an e-mail will be sent to the **Client** with a randomly generated password from the server. This will give your **Client** access to the portal for your **Practice** to view selected medical records only for his or her own **Patient(s)**.

Important Note

We recommend leaving the box unchecked for Send welcome e-mail until your Practice users have gone through the free trial period and are familiar with using the ADC application. For more information on sending a welcome e-mail to a Client, please see [Client welcome e-mail](#). For more information on your online portal, please see [Practice Portal](#).

7. Enter the **Client's** mailing address, including the Zip/Postal Code.
8. Select the **Save** button after you have entered all the information for the **Client**. After a **Client** has been saved, a new tile is created on the **Client** home page displaying the new **Client's** information.

c) Refresh

To update the **Client** database to the most current list, select the **Refresh** button.

This provides an update if new **Clients** have been added since you first started searching the **Client** database.

d) Tiles and icons

On the **Client** page there will be 9 **Client** tiles displayed, by default. Across the top of each **Client** tile there will be from 2 to 4 icons displayed, depending on your **Role Permissions**.

Select the green **Edit** icon to make any changes for the **Client**. Select the **Save** button when all changes are complete, or **Cancel** if no changes were made. Select the dog/cat logo to open the **Patients** for this **Client**. Depending upon your **Role Permissions**, if a **Client** leaves your **Practice**, select the red **Make Inactive** icon to stop adding further medical records for the **Client**.

Depending upon your **Role Permissions**, you can select the red **Delete** icon to remove the **Client** from the **ADC** application.

Important Note

The Patient assigned to the Client must be deleted prior to deleting the Client. For more information on deleting a Patient, please see [Tiles and icons](#).

e) Client welcome e-mail

A **Client** welcome e-mail provides the **Client** with a randomly generated password from the server. This password allows the **Client** to view his/her own **Patient(s)** select medical records through the online portal for your **Practice**.

The medical records that can be viewed by the **Client** can only be changed by the **Practice Director** by selecting the **Settings** button, then **Role Permissions**, and then selecting **Client** from the **Role Name** dropdown list.

Important Note

We recommend leaving the box unchecked for Send welcome e-mail until your Practice users have gone through the free trial period and are familiar with using the ADC application.

f) How to send a Client welcome e-mail

A welcome e-mail can only be sent when a **Client** is being added to **ADC**, or from the **Edit Client** page.

Below the **Client e-mail address** field, there is the option to **Send welcome e-mail** with a checkbox. If the box is checked, when the **Save** button is selected an e-mail will be sent to the **Client** with a randomly generated **Password** to allow the **Client** access to select medical records for his or her **Patient(s)**.

The next time you edit the **Client** there will be a note below **Send welcome e-mail** indicating **Welcome e-mail last sent [Date]**.

Alternatively, if you leave the box unchecked for **Send welcome e-mail**, the next time you edit the **Client** there will be a note below **Send welcome e-mail** indicating **Welcome e-mail has not been sent**.

If an e-mail has already been sent and you select the checkbox beside **Send welcome e-mail**, this will send a new e-mail with a new randomly generated password from the server that must be used by the **Client** to sign in to your **Practice** portal.

2. Patient

Select the **Patient** tab to open the **Patient** page. Once the **Patient** page is open there will be a search box and 3 buttons displayed: **Search**, **Add** and **Refresh**.

a) Search

To search for a **Patient** tile in the database, enter one or more letters of the **Patient's** name in the search box, and select **Search**.

Alternatively, enter one or more numbers of the **Patient ID** and select **Search**.

To display all the **Patients** in the **Practice** by their names listed in descending alphabetical order, leave the search box blank, and select **Search**.

To display more **Patient** tiles per page, move the **Columns Count** slider to the right.

b) Add

1. To enter a new **Patient**, select the **Add** button.
2. Enter the **Patients'** name.
3. To select a **Client**, start entering two or more first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters in descending alphabetical order. Select the **Client** from the dropdown list.

OR

Select **Add Client** to open a second screen to enter new **Client** information. Once all the new **Client** information is entered, select **Save** and this returns to the **Patient** page. Then select the **Client** that has been added from the dropdown list. For more information on how to add a new **Client**, please see [Client](#).

4. Select species for the **Patient**.
5. Enter **Patient** signalment (Breed, Color, Sex, Date of Birth).

6. Select an existing **Referring Vet** from the dropdown list by typing the first three letters of the **Referring Vet's** first or last name.

OR

Select **Add Referring Vet** to open a second screen to enter a new **Referring Vet**.

Once all the **Referring Vet** information is entered, select **Save** and this returns to the **Patient** page. Then select the **Referring Vet** that has been added from the dropdown list. For more information on how to add a new **Referring Vet**, please see [Referring Vet](#).

7. Select a **Default Vet** from the dropdown list. The **Practice Director** can add a **Default Vet** under **Practice Settings**. Please see [Practice Users](#) for information on adding **Practice Veterinarians** if the default vet is not also the **Practice Director**.
8. If available, add a **Patient ID** and **Body Weight** for each **Patient**, either in **kg** or **lbs** as chosen in **Settings** for the **ADC** application. If you do not have a **Patient ID** or **Body Weight**, please leave these fields blank.
9. An **Alert** can be added for each **Patient** by selecting the checkbox beside **Display Alert**, then entering the description of the **Alert** in the text box.

After selecting the **Save** button, a red exclamation mark icon will appear beside the **Patient** name in all **Medical Record** tiles for the **Patient**. If you mouse over the icon, the description of the **Alert** will be displayed followed by a description for a **Client Alert** if one has been added.

A **Patient Alert** will also display in the **Patient Medical History**, **Consultation**, or **Recheck** for a **Patient**. The description of the **Alert** will be displayed below the **Client** and **Patient** dropdown list, the **Patient Alert** will be followed by a description for a **Client Alert** if one has been added.

If the **Alert** no longer applies to the **Patient**, open the **Patient** menu option, select the **Edit** icon for the **Patient**, and then unselect the checkbox beside **Display Alert**.

10. Select the **Save** button after you have entered all the information for the **Patient**.

After a **Patient** has been saved, a new tile is created on the **Patient** home page displaying the new **Patient's** information.

c) Refresh

To update the **Patient** database to the most current list, select the **Refresh** button.

This provides an update if new **Patients** have been added since you first started searching the **Patient** database.

d) Tiles and icons

On the **Patient** page there will be 9 **Patient** tiles displayed, by default. Across the top of each **Patient** tile there will be from 1 to 3 icons displayed, depending on your **Role Permissions**.

Select the green **Edit** icon to make any changes for the **Patient**. Select the **Save** button when all changes are complete, or **Cancel** if no changes were made.

Depending upon your **Role Permissions**, if a **Patient** is deceased or is no longer owned by the same **Client**, select the red **Make Inactive** icon. This prevent any further medical records from being added within the **ADC** application.

Depending upon your **Role Permissions**, select the red **Delete** icon to remove the **Patient** from the **ADC** application.

Important Note

All medical records within the Patients' Medical History must be deleted before a Patient can be deleted. If none of the Patient Medical Records have been locked yet, you can open Patient Medical History and select the red Delete icon to delete each file in Patient Medical History for the Patient.

3. Referring Vet

If the answer was **Yes** to **Accepting Patients from Referring Vets** under **Practice Settings**, select the **Referring Vet** tab to open the **Referring Vet** page. Once the **Referring Vet** page is open, there will be a search box and 3 buttons displayed: **Search**, **Add** and **Refresh**.

a) Search

To search for a **Referring Vet** tile in the database, enter one or more of the first letters of the **Referring Vet's** first or last name or Practice name in the search box, and select **Search**. The **Referring Vets** with a last name, or Practice name that matches the letter or letters will be displayed in descending alphabetical order.

To display all the **Referring Vets** in your database by their last names in descending alphabetical order, leave the search box blank and select **Search**. To display all the **Referring Vets** in your database that work at the same **Practice**, enter the name of the **Practice** in the search box and select **Search**.

To display more **Referring Vet** tiles per page, move the **Columns Count** slider to the right.

b) Add

1. To enter a new **Referring Vet**, select the **Add** button.
2. A **Title** can be selected from the buttons available, or else select the **Other** button and **Enter Other Title** will be displayed. The freeform entry gives unlimited options.

If no **Title** is selected or entered, this will default to no **Title**.

3. Enter the first and last name of the **Referring Vet**.
4. Select the **Practice** by starting to type the **Practice Name** in the field. A dropdown list will display **Practice Names** that match. Select the **Practice** from the dropdown list, and this will automatically fill in all the information about the **Practice** in the remaining fields.
5. If a **Referring Vet** is being added from a **Practice** that has not been added previously, select the **Add New** button for the **Practice Name**.
6. The e-mail address field may be left blank if there is no e-mail address for the **Referring Vet**. Then select the checkbox beside **No e-mail address**.
7. You have the option of entering an e-mail address for a new **Referring Vet**. If it is already in use, an **ADC** notice will be displayed: **Sorry, this e-mail address is in use by [Name]**. If this is a general e-mail address for the **Practice**, then select the checkbox for **This e-mail address is shared between Referring Vets of the same Practice**.

Important Note

It is recommended that all Referring Vets from the same Practice be assigned the same e-mail address when being added into ADC. This will allow access to all Patients from that hospital using the same login information on your Practice portal. For more information on your portal, please see [Practice Portal](#).

8. If an e-mail address is added for a **Referring Vet**, the default setting is for the box to be checked next to **Send welcome e-mail**. For more information on sending a welcome e-mail please see [Referring Vet welcome e-mail](#).

Important Note

We recommend UNCHECKING the box for Send welcome e-mail until your Practice users have gone through the free trial period and are familiar with using the ADC application.

9. Once all fields are complete, select the **Save** button to finish adding the new **Referring Vet**. The **Edit** button can be selected to correct **Practice** name errors.

Important Note

If the box was selected to indicate that this e-mail is shared between Referring Vets of the same Practice, a notice will display a list of the other Vets that have this e-mail address. Select Yes to confirm these Vets share the same e-mail address, and continue with saving the new Referring Vet.

c) Refresh

To update the **Referring Vet** database to the most current list, select the **Refresh** button. This provides an update if new **Referring Vets** have been added since you first started searching the **Referring Vet** database.

d) Tiles and icons

On the **Referring Vet** page there will be 9 **Referring Vet** tiles displayed, by default. Across the top of each **Referring Vet** tile there will be from 2 to 3 icons displayed, depending on your **Role Permissions**.

Select the green **Edit** icon to make any changes for the **Referring Vet**. Select the **Save** button when all changes are complete, or **Cancel** if no changes were made. Depending upon your **Role Permissions**, if a **Referring Vet** is no longer in practice, select the red **Make Inactive** icon to stop adding further medical records for the **Referring Vet**.

Depending upon your **Role Permissions**, if a **Referring Vet** was added in error and has not had **Patients** assigned, select the red **Delete** icon.

e) Referring Vet welcome e-mail

A **Referring Vet** welcome e-mail provides the **Referring Vet** with a randomly generated password from the server, giving him or her access to your **Practice** portal. He or she can then view selected medical records only for the **Patients** referred by his or her **Practice**.

Important Note

It is recommended that all Referring Vets from the same Practice be assigned the same e-mail address when being added into ADC. This will allow access to all Patients from that hospital using the same login information. For more information on your portal, please see [Practice Portal](#).

The **Referring Vet** can also add medical history files on your portal for any **Patient** he or she has referred to your **Practice**. This first requires the **Patient** to be added to **ADC** in your **Practice**, and the **Referring Vet** be assigned to the **Patient**.

When a Referring Vet adds medical history files on your portal, an e-mail alert will be sent to your Practice's e-mail address with the following information:

[Referring Vet Practice] has added medical records to the Patient Medical History for [Patient First Name] [Client Last Name] using your Practice portal.

The medical records that can be viewed by the **Referring Vet** on your portal can only be changed from the default settings by the **Practice Director**. This can be done by selecting the **Settings** button, then **Role Permissions**, and then selecting **Referring Vet** from the **Role Name** dropdown list.

Important Note

By default, the box for Send welcome e-mail is checked. We recommend UNCHECKING the box for Send welcome e-mail until your Practice users have gone through the free trial period and are familiar with using the ADC application.

f) How to send a Referring Vet welcome e-mail

A welcome e-mail can only be sent when a **Referring Vet** is being added to **ADC**, or from the **Edit Referring Vet** page.

When adding or editing a **Referring Vet**, if the box is checked beside **Send welcome e-mail**, when the **Save** button is selected an e-mail will be sent to the **Referring Vet** with a randomly generated password to allow him or her access to the online portal for your **Practice**.

The next time you edit this **Referring Vet**, there will be a note below **Send welcome e-mail** indicating **Welcome e-mail last sent [Date]**.

When adding or editing a **Referring Vet**, if the box for **Send welcome e-mail** is unchecked, the next time you edit this **Referring Vet** there will be a note below **Send welcome e-mail** indicating **Welcome e-mail has not been sent**.

When a new **Referring Vet** is added from a previously added **Practice** with a previously assigned e-mail address, enter a checkmark in the box beside **This e-mail address is shared between Referring Vets of the same Practice**. When you select **Save**, an ADC Notice will be displayed:

The [e-mail] address has already been assigned.

It will then list any previously added **Referring Vets** with the **Practice** name, followed by:

Do you wish to share this e-mail address with any Referring Vet in this Practice?

Select **Yes** to confirm you wish to share the e-mail address.

Important Note

It is recommended that all Referring Vets from the same Practice be assigned the same e-mail address when being added into ADC. This will allow access to all Patients from that hospital using the same login information on your portal. For more information on your online portal, please see [Practice Portal](#).

The next time you edit this **Referring Vet**, there will be a note below **Send welcome e-mail** indicating **Welcome e-mail last sent [Date]**. This means a welcome e-mail was previously sent with a randomly generated password from the server for this previously assigned e-mail address.

If an e-mail has already been sent and you select the checkbox beside **Send welcome e-mail**, this will send a new e-mail with a new randomly generated password from the server that must be used by ALL **Referring Vet(s)** sharing the same e-mail address to login to your **Practice** portal.

4. Patient Medical History

On the **Home** page select the **Patient Medical History** tab to open the **Patient Medical History** page. **Patient Medical History** refers to any medical records that have been created within or added to **ADC** for a **Patient**.

To select an existing **Client**, start entering two or more of the first letters of the last name in the **Client** field. This will dynamically display all **Clients** with a last name that matches the letters in descending alphabetical order. Select the **Client** from the dropdown list.

If there is only one **Patient** for the **Client**, the **Patient Name** followed by the **Patient ID** will automatically be displayed and the **Patient Medical History** will open for this **Patient**. If there is more than one active **Patient** for the **Client**, then select the dropdown icon to display all the **Patients** with their **Patient IDs** for the **Client**. Select the **Patient** for that **Client** from the dropdown list. This will display all the **Patient Medical History** for that **Patient**.

You can also search **Patient Medical History** with the **Patient** field. Start typing 2 or more letters for the **Patient** name in the **Patient** field, and matching names will be displayed in descending alphabetical order followed by their **Patient IDs**. Select the **Patient** for that **Client** from the dropdown list. This will display all the medical history for that **Patient**.

Alternatively, you can enter the complete **Patient ID** in the **Patient** field, and this will display all the medical history for that **Patient**.

Once a **Client** and **Patient** have been selected, any **Patient** or **Client Alerts** that have been added will display below the **Client** and **Patient** fields.

If the answer was **Yes** to **Accepting Patients from Referring Vets** under **Practice Settings**, you can search **Patient Medical History** with **Referring Vet**. Start typing 2 or more letters for the **Referring Vet or Practice Name** in the field, and matching names will be displayed in a dropdown list in descending alphabetical order.

When you select the **Referring Vet or Practice Name** from the dropdown list, this will display the corresponding **Client** name. If there is only one **Patient** for this **Client**, the **Patient Medical History** will automatically be displayed for this **Patient**.

If there is more than one active **Patient** for the **Client**, then select the dropdown icon to display all the **Patients** with their **Patient IDs** for the **Client**. Select the **Patient** for that **Client** from the dropdown list. This will display all the **Patient Medical History** for that **Patient**.

When the **Patient Medical History** is displayed there will be a **Client** and **Patient** tile along with a **Referring Vet** tile as applicable. On the right upper corner of each tile there is an **Edit** icon that can be selected to make any changes in each of the tiles.

Any new medical record created within **ADC** will automatically be added to the **Patient Medical History**. For example, **Consultation**, **Recheck**, **Anesthetic Monitoring Chart**, **Dental Chart** will be displayed for the **Patient Medical History** page.

Any new medical record created within **ADC** will be saved as a digitally signed pdf document. The digital signature includes a date/time stamp and will also display “**Created by [User Name]**” for the user who signed in to ADC when the record was first saved. If the medical record is edited, then the digital signature will display “**Edited by [User Name]**” for the last user who is signed in to ADC when any editing was done.

a) Add Patient Medical History

Select the **Add Patient Medical History** button to add any **Patient Medical History** files for the **Patient**. Any file format including documents, images, and videos can be saved to **Patient Medical History**.

For example, all referral requests, laboratory reports, histopathology reports, radiographic images, images of pathology, images of procedures, and videos of procedures can be saved.

Any new medical record created within **ADC** will automatically be added to the **Patient Medical History** as well. For example, **Consultation, Recheck, Anesthetic Monitoring Chart, Dental Chart** will be displayed for the **Patient Medical History** page.

b) Download Audit Log

To comply with legal requirements for electronic medical records, each version of each medical record is stored on the server with a date/time stamp. The log links to all versions of the medical records, and these are available as pdf documents with SSL digital signatures generated for **ADC** by the server. This provides world class security ensuring a complete **Patient Medical History** as it was entered.

A **Download Audit Log** button to the right of the **Add Patient Medical History** button is viewable to the **Practice Director(s)** or to any other users the **Practice Director** has added in **Role Permissions** listed under **Settings**.

When selected, this gives a complete listing of each version of each medical record for the selected **Patient**, along with the action for each record of having been **Added, Changed, or Deleted**.

A listing of any attachments for each record is also displayed. Each attachment can be viewed by selecting the **Attachments** paperclip icon in an Adobe® pdf viewer sidebar menu.

Each pdf file is created with our secure **animaldentalchart.com** server SSL digital signature certificate, so no changes can be made without invalidating the signature. Adobe® pdf viewer will display that this signature is valid but will show that it “may not be trusted”.

c) Search Patient Medical History

The **Search Patient Medical History** button allows you to view all or select records within the selected **Patient's** medical history.

Select **All** or any of the types of medical records then select the **Search** button. A list of all selected records will be displayed. A **Start Date** and an **End Date** can be entered for your search to narrow down the number of displayed medical records. To start a new search, select the **Clear** button.

d) Export Selected Patient Medical History

This will create a single digitally signed pdf file with all the selected medical record files that can be e-mailed or saved to any other application.

This is different from the **Audit Log**, as only the most current version of each medical record can be selected.

To select all the medical records to be exported, select the top left checkbox for the list. Otherwise, select the checkbox beside individual medical records. Then select the **Export Selected Patient Medical History** button.

The following **ADC Notice** is displayed:

Please select the exported file format:
Single pdf with scrollable, merged files
Single pdf with log of attached files

A single pdf with scrollable, merged files will merge the selected files in chronological order from oldest to newest.

A single pdf with a log of attached files has a blue eye **View** icon that can be selected beside each file in the log. The **View** icon can be selected to view each medical record if it is in pdf format. If the file is not in pdf format, select the paperclip attachment icon in the Adobe® pdf viewer application to view the file.

Either of these files formats can be exported as a single file using an Adobe® pdf viewer application.

e) Patient medical record icons

For the **Patient Medical History** there are anywhere from 2 or 4 icons available to select for each individual medical record, depending on your **Role Permissions**. They are displayed in the following order: **View**, **Edit**, **Export**, and **Delete**.

Select the blue eye **View** icon to view that medical record as a digitally signed pdf document. This document can be printed.

Select the green **Edit** icon to make any changes to the medical record.

Important Note

By default, **AutoLock Days** is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the **Practice Director(s)** under **Practice Settings**. If the medical record has been locked, the grey **Record Locked** icon will be displayed, and editing is no longer permitted.

Select the blue **Export** icon to export the selected medical record as a pdf or Word® document to another application. This document can also be printed. For more information on exporting more than one file at a time, please see [Export Selected Patient Medical History](#).

Depending upon your **Role Permissions**, you may select the red **Delete** icon if you wish to delete the medical record from **ADC**. Medical records cannot be deleted after the files are locked. By default, **AutoLock Days** is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the **Practice Director(s)** under **Practice Settings**.

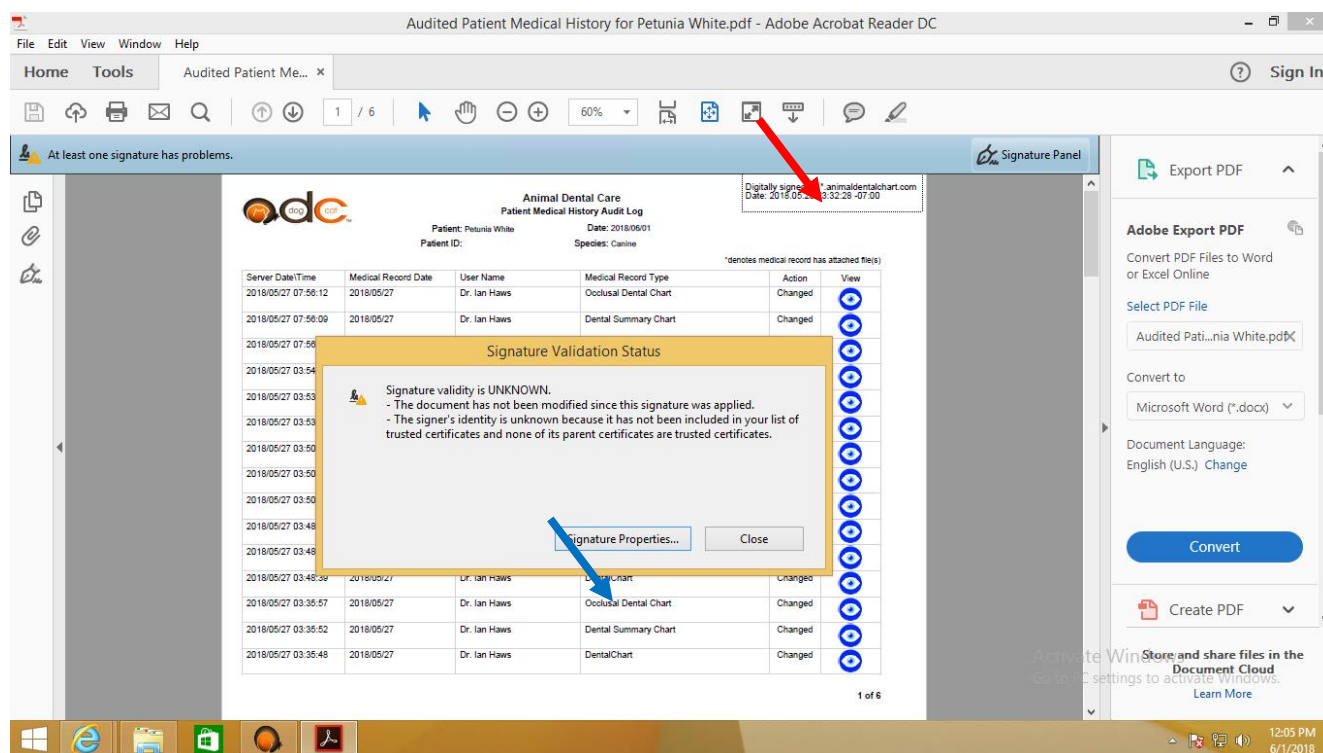
All **Patient Medical History** files must be deleted for a **Patient** in order to delete a **Patient** from the **ADC** application.

f) Validating the Digital Signature

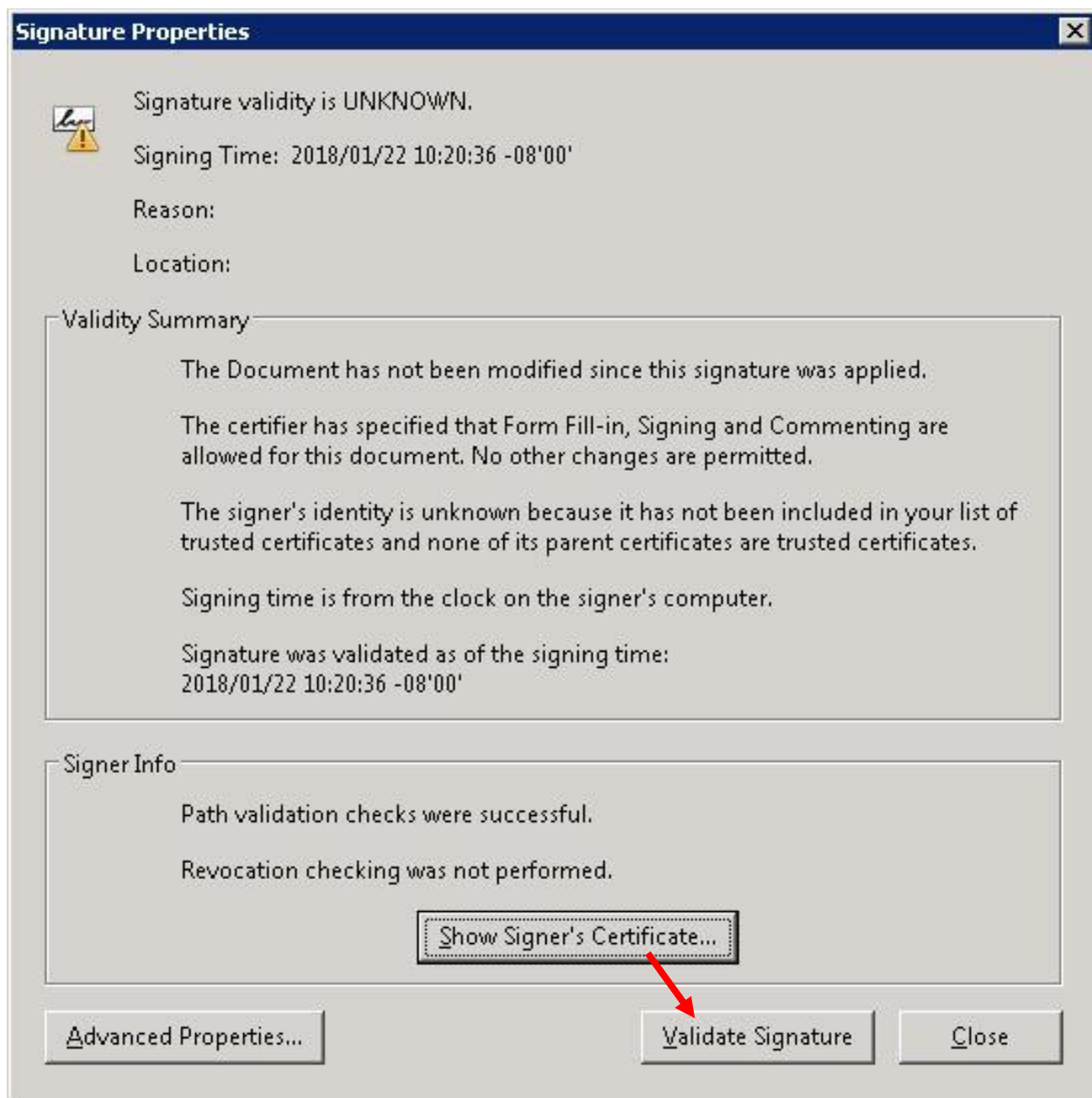
There will be message at the top left of the digitally signed PDF, **At least one signature has problems**. This is normal since Adobe® pdf viewer only trusts a few companies that buy their own Adobe® certificates, even though the digital signature certificate for animaldentalchart.com is secure.

The following shows the steps in how to validate the digital signature for your pdf documents:

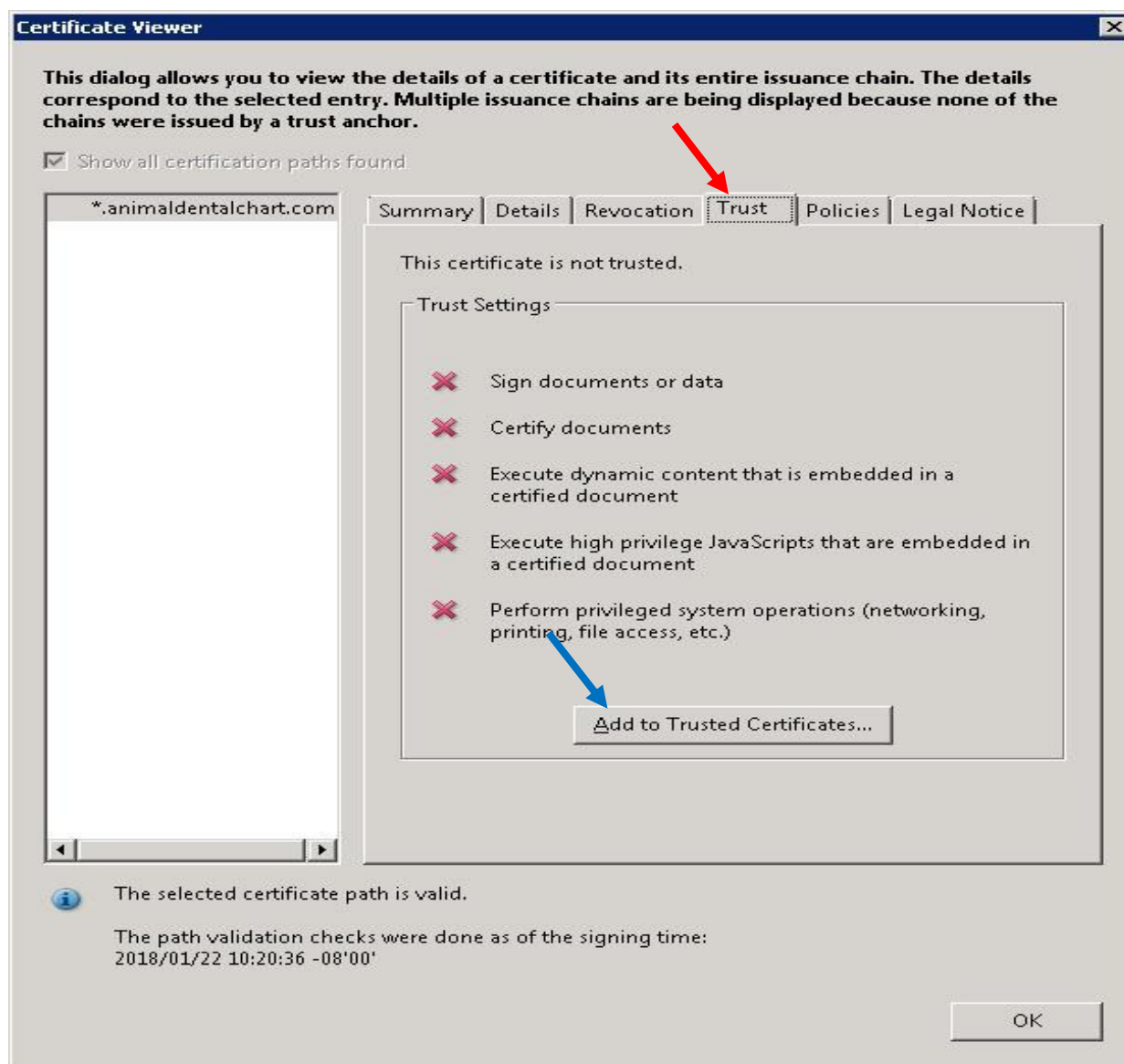
To validate the digital signature for your pdf documents, select the signature area at the top right in the document (red arrow). The message below appears. Select the **Signature Properties** button (blue arrow).



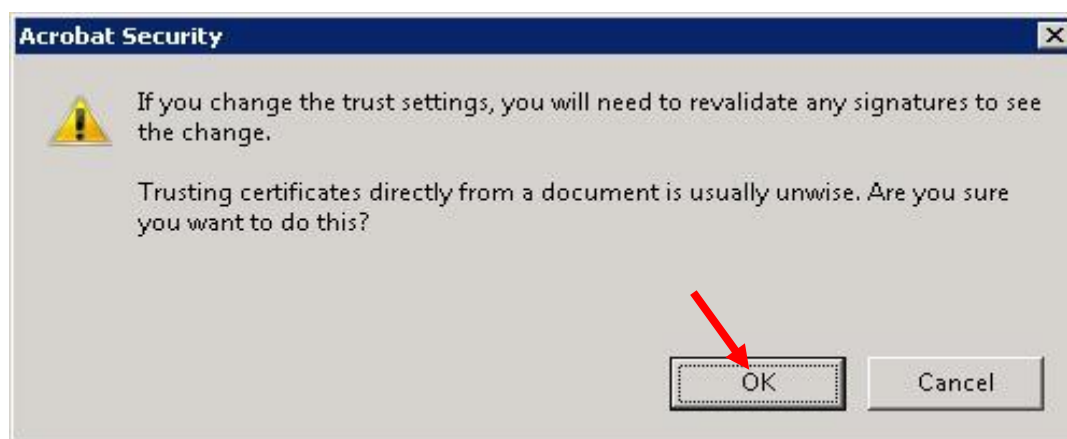
The following screen is then displayed. Select **Validate Signature** (red arrow).



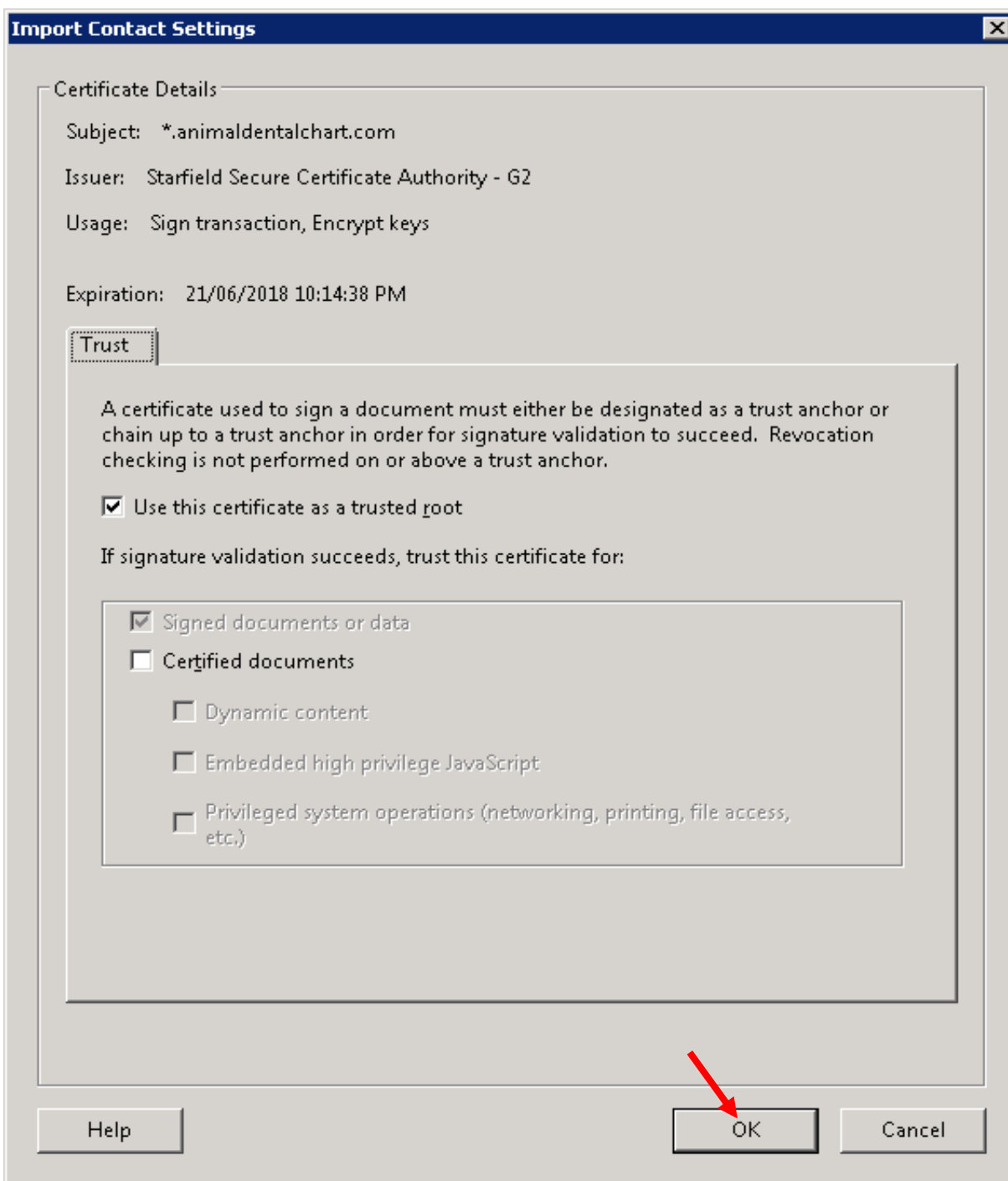
This screen appears. Select the **Trust** tab as shown below (red arrow), then the **Add to Trusted Certificates** button (blue arrow):



The following prompt is displayed. Select **OK** (red arrow).

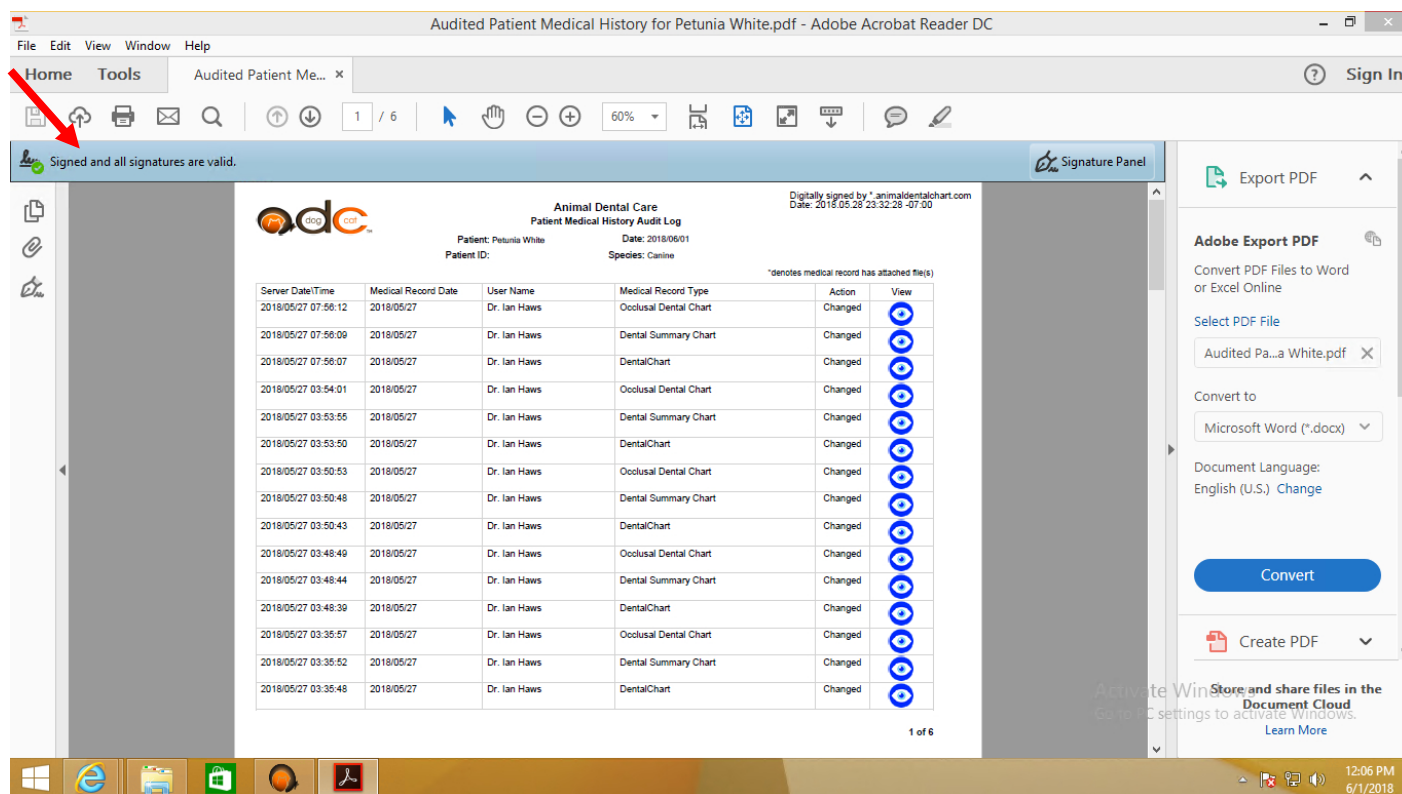


The following screen is then displayed. Select **OK** (red arrow).



Select **OK** or **Close** for all other open windows. Then close the Adobe® pdf viewer.

Re-launch the Adobe® pdf viewer. Note the message on the upper left has changed to **Signed and all signatures are valid.** (red arrow)



5. Medical Records

Select the **Medical Records** tab to open the dropdown list for **Medical Records**.

Medical Records refers to all medical records or files that can be reviewed or created for a **Patient**. Any new medical record created within **ADC** will automatically be added to the **Patient Medical History**.

The **Medical Records** dropdown list is as follows:

- Body Weight**
- Consultation**
- Recheck**
- Master Problem List**
- Hospital Flowsheet and Notes**
- Case Summary**

a) Body Weight

Select **Body Weight** on the dropdown list to open the **Body Weight** page. Once the **Body Weight** page is open, there will be a search box and 3 buttons displayed: **Search**, **Add** and **Refresh**.

Search

To search for a **Patient's Body Weight**, enter the **Client's** last name in the search box, and select **Search**.

This will display all **Body Weight** tiles for all **Patients** with that last name, in chronological order from the most recent to the oldest. This will display a new tile for each time the **Body Weight** is entered for the **Patient**, providing a quick and easy method to review the **Body Weight** history for a **Patient**.

To display all the **Body Weights** in the database in chronological order, going from most recent to oldest, leave the search box blank, then select **Search**.

To display more **Body Weight** tiles per page, move the **Columns Count** slider to the right.

Add

To **Add** a **Body Weight** for a **Patient**, select **Add**.

To select a **Client**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches these letters in descending alphabetical order. Select the **Client** from the dropdown list.

Then select the **Patient** from the dropdown list.

Enter the **Body Weight** for the **Patient** in either **kg** or **lbs** (units selected under **Settings, Practice Settings**).

Notes can be added. There is the option of selecting the **Insert Date/Time** button to insert the current date and local time as a line entry in the **Notes** field. These notes will be displayed on the new **Body Weight** tile on the **Body Weight** page as well as on the **Patient Medical History** page.

Select the **Save** button after entries are made.

After a **Body Weight** is saved, it will be displayed in the **Body Weight** field in both the **Consultation** and **Recheck** when either is opened.

Refresh

To update the **Body Weight** database to the most current list, select the **Refresh** button. This provides an update if new **Patient Body Weights** have been added since you first started searching the **Body Weight** database.

Tiles and icons

On the **Body Weight** page there will be 9 **Body Weight** tiles displayed. Across the top of each tile there will be from 2 to 4 icons displayed, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Body Weight** tile for a **Patient** in order to view the **Body Weight** as a digitally signed pdf document. This document can be printed.

Select the green **Edit** icon on the **Body Weight** tile for a **Patient** in order to make any changes to the **Body Weight**. This will then update the **Body Weight** in the **Body Weight** field in the **Consultation** and **Recheck** when either is opened.

Important Note

By default, AutoLock Days is set to 30 so that editing can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased by the Practice Director(s) under Practice Settings. If the medical record has been locked, the grey Record Locked icon will be displayed and editing is no longer permitted.

Depending upon your **Role Permissions**, you may select the amber **Lock** icon if you wish to manually lock the **Body Weight** file from any further entries. By selecting the amber **Lock** icon, the icon changes to the grey **Record Locked** icon.

Depending upon your **Role Permissions** and if the record is not locked, you may select the red **Delete** icon if you wish to delete the **Body Weight** file from **ADC**.

b) Consultation

Select **Consultation** on the dropdown list to open the **Consultation** page. Once the **Consultation** page is open there will be a search box and 3 buttons displayed: **Search**, **Add** and **Refresh**.

Search

To select a **Client**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Consultations** for all **Patients** with that last name.

To display all the **Consultations** in the database in chronological order, going from most recent to oldest, leave the Search box blank, then select **Search**.

To display more **Consultation** tiles per page, move the **Columns Count** slider to the right.

Add

To **Add** a new **Consultation** for a **Patient**, select **Add**. The date defaults to the current date, but can be changed to a future date if you are preparing a future **Consultation**.

To select a **Client**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

Then select the **Patient** from the dropdown list.

The **Body Weight** in either **kg** or **lbs** (units selected under **Settings, Practice Settings**) will be autofilled in the **Body Weight** field from the most recent entry in the **Body Weight** menu option for the **Patient**. If the **Body Weight** is updated in the **Consultation**, this will be autofilled in the **Body Weight** menu option.

Select the **Vet** from the dropdown list.

If there is more than one **Consultation** template, select the template you wish to use from the dropdown list. The selected template will then be displayed in the **Notes** field. There is the option of selecting the **Insert Date/Time** button to insert the current date and local time as a line entry in the **Notes** field.

Any **Template Tags** will be autofilled.

Alternatively, select **Add File** to download a **Consultation** file from your local drive that you have created in another application such as Microsoft Word®.

Entries can be made in the **Notes** field using a stylus for Windows® PC or Android® devices, or with a stylus or an Apple Pencil® for an iPad® or iPad Pro®.

Entries can also be made using a keyboard with a touchpad or mouse. With handwriting recognition software on the computer or device, cursive writing can be converted to text. With speech recognition software on the computer or device, speech can be converted to text.

The **Add File** button can also be used to add an image or video file of your **Patient** from your local drive to be saved with your **Consultation**. Select the file, then select **Save** to attach the file to your **Consultation**.

If the **Patient** is being admitted, enter procedure(s) in the field **Procedure(s) for Admission and Consent Form**.

Then select the **Admission and Consent Form** button for admitting **Patients**. The entries for the **Procedure(s) for the Admission and Consent Form** will be copied to the **Admission and Consent Form**. For more information, please see [Admission and Consent Form](#).

Once **OK** is selected for the signature in the **Admission and Consent Form**, this will return you to the **Consultation**.

If you wish to print the **Consultation**, select **Print Preview** at the bottom of the page. When **Print Preview** is selected, a digitally signed pdf is created to review the page breaks of the Consultation before the file is saved. If a page break needs to be added, place your cursor in the **Consultation** where you wish to add one.

Then there are two ways to insert the page break:

1. A right-mouse click function can be done by holding the stylus on the screen or else doing a right-mouse click with a mouse, and this will display the dropdown menu that includes **Insert Page Break**. Select **Insert Page Break** from the menu and this will be added where the cursor has been placed in the **Consultation**.

2. Scroll up to the text editor toolbar and select **Inert Page Break**, and this will be added where the cursor has been placed in the **Consultation**.

Then select **Print Preview** again and check to see if **Consultation** page break is in the correct place before selecting **Save**. Additional page breaks can be added as needed, and to remove ones added in the incorrect place, edit the **Consultation** and delete the **[Page Break]** entry within the text.

Select **Save** at the bottom of the page to save the **Consultation, Admission and Consent Form**, as well as any attached files to the **Patient Medical History**.

Refresh

To update the **Consultation** database to the most current list, select the **Refresh** button. This provides an update if new **Consultations** have been added since you first started searching the **Consultation** database.

Tile and icons

On the **Consultation** page there will be 9 **Consultation** tiles displayed. Across the top of each tile there will be from 3 to 6 icons displayed, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Consultation** tile in order to view that medical record as a digitally signed pdf document. This document can be printed. A listing of any attachments for each **Consultation** is also displayed. Each attachment can be viewed by selecting the **Attachments** paperclip icon in the Adobe® pdf viewer sidebar menu.

Select the green **Edit** icon on the **Consultation** tile in order to make any changes to that medical record. Select **Save** when all edits are complete.

Important Note

By default, AutoLock Days is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked, the grey Record Locked icon will be displayed and editing is no longer permitted.

Depending upon your **Role Permissions**, you may select the amber **Lock** icon if you wish to manually lock the **Consultation** file from any further

entries. By selecting the amber **Lock** icon, the icon changes to the grey **Record Locked** icon.

Depending upon your **Role Permissions** and if the record is not locked, you may select the red **Delete** icon if you wish to delete the **Consultation** from **ADC**.

If applicable, select the blue **Attachment** paper clip icon for each file added to the **Consultation**. Select each **Attachment** icon to view each attached file.

c) Recheck

Select **Recheck** on the dropdown list to open the **Recheck** page. Once the **Recheck** page is open there will be a search box and 3 buttons displayed: **Search**, **Add**, and **Refresh**.

Search

To select a **Client**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Rechecks** for all **Patients** with that last name.

To display all the **Rechecks** in the database in chronological order, going from most recent to oldest, leave the search box blank, then select **Search**.

To display more **Recheck** tiles per page, move the **Columns Count** slider to the right.

Add

To **Add** a new **Recheck** for a **Patient**, select **Add**. The date defaults to the current date, but can be changed to a future date if you are preparing a future **Recheck**.

To select a **Client**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

Then select the **Patient** from the dropdown list.

The **Body Weight** in either **kg** or **lbs** (units selected under **Settings, Practice Settings**) will be autofilled in the **Body Weight** field from the most recent entry in the **Body Weight** menu option for the **Patient**. If the **Body Weight** is updated in the **Recheck**, this will be autofilled in the **Body Weight** menu option.

Select the **Vet** from the dropdown list.

If there is more than one **Recheck** template, select the template you wish to use from the dropdown list. The selected template will then be displayed in the **Notes** field. There is the option of selecting the **Insert Date/Time** button to insert the current date and local time as a line entry in the **Notes** field.

Any **Template Tags** will be autofilled.

Alternatively, select **Add File** to download a **Recheck** file from your local drive that you have created in another application such as Microsoft Word®.

Entries can be made in the **Notes** field using a stylus for Windows® PC or Android® devices, or with a stylus or an Apple Pencil® for an iPad® or iPad Pro®.

Entries can also be made using a keyboard with a touchpad or mouse. With handwriting recognition software on the computer or device, cursive writing can be converted to text. With speech recognition software on the computer or device, speech can be converted to text.

The **Add File** button can be also be used to add an image or video file of your **Patient** from your local drive to be saved with your **Recheck**. Once the file is selected select **Save** to attach the file to your **Recheck**.

If the **Patient** is being admitted, enter procedure(s) in the field **Procedure(s) for Admission and Consent Form**.

Then select the **Admission and Consent Form** button for admitting **Patients**. The entries for the **Procedure(s) for the Admission and Consent Form** will be copied to the **Admission and Consent Form**. For more information, please see [Admission and Consent Form](#).

Once **OK** is selected for the signature in the **Admission and Consent Form**, this will return you to the **Recheck**.

If you wish to print the **Recheck**, select **Print Preview** at the bottom of the page. When **Print Preview** is selected, a digitally signed pdf is created for the user to review the page breaks of the **Recheck** before the file is saved. If a page break needs to be added, place your cursor in the **Recheck** where you wish to add one.

Then there are two ways to insert the page break:

1. A right-mouse click function can be done by holding the stylus on the screen or else doing a right-mouse click with a mouse, and this will display the dropdown menu that includes **Insert Page Break**. Select **Insert Page Break** from the menu and this will be added where the cursor has been placed in the **Recheck**.
2. Scroll up to the text editor toolbar and select **Inert Page Break**, and this will be added where the cursor has been placed in the **Recheck**.

Then select **Print Preview** again and check to see if **Recheck** page break is in the correct place before selecting **Save**. Additional page breaks can be added as needed, and to remove ones added in the incorrect place, edit the **Recheck** and delete the **[Page Break]** entry within the text.

Select **Save** at the bottom of the page to save the **Recheck, Admission and Consent Form**, as well as any attached files to the **Patient Medical History**.

Refresh

To update the **Recheck** database to the most current list, select the **Refresh** button. This provides an update if new **Rechecks** have been added since you first started searching the **Recheck** database.

Tiles and icons

On the **Recheck** page there will be 9 **Recheck** tiles displayed by default. Across the top of each tile there will be from 3 to 6 icons displayed, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Recheck** tile in order to view that medical record as a digitally signed pdf document. This document can be printed. A listing of any attachments for each **Recheck** is also displayed. Each attachment can be viewed by selecting the **Attachments** paperclip icon in the Adobe® pdf viewer sidebar menu.

Select the green **Edit** icon on the **Recheck** tile for a **Patient** in order to make any changes to the **Recheck**. Select **Save** when all edits are complete.

Important Note

By default, **AutoLock Days** is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked, the grey **Record Locked** icon will be displayed and editing is no longer permitted.

Depending upon your **Role Permissions**, you may select the amber **Lock** icon if you wish to manually lock the **Recheck** file from any further entries. By selecting the amber **Lock** icon, the icon changes to the grey **Record Locked** icon.

Depending upon your **Role Permissions** and if the record is not locked, you may select the red **Delete** icon if you wish to delete the **Recheck** file from **ADC**.

If applicable, select the blue **Attachment** paper clip icon for each file added to the **Recheck**. Select each **Attachment** icon to view each attached file.

Admission and Consent Form

An **Admission and Consent Form** can be accessed from either a **Consultation** or a **Recheck** for a **Patient**.

For the **Consultation** or **Recheck**, enter procedure(s) in the field **Procedure(s) for Admission and Consent Form**.

Important Note

Procedure(s) for the **Admission and Consent Form** can be added to the **Consultation** or **Recheck**, then saved prior to the time of the **Consultation** or **Recheck**. This can be done to save time when admitting a **Patient** so the **Procedure(s)** are automatically entered in the **Admission and Consent Form**.

Then select the **Admission and Consent Form** button for admitting a **Patient**. The **Procedure(s) for the Admission and Consent Form** will be copied to the **Admission and Consent Form**.

You can make changes to the procedures that are copied to the **Procedure(s)** field in the **Admission and Consent Form**.

Important Note

If you make any changes to the **Procedure(s)** field in the **Admission and Consent Form**, when the **Admission and Consent Form** and the **Consultation** or **Recheck** is Saved, these changes will automatically be updated in the **Procedure(s) for the Admission and Consent Form** in the **Consultation** or **Recheck**.

You or the **Client/Agent** can select from the two choices for any additional procedures, as preferred by the **Client/Agent**.

Then select the **Open Signature Field** button to open a new field for signing. The **Client/Agent** can then sign the document with a stylus for Windows® PC or Android® devices or with a stylus or an Apple Pencil® for an iPad® or iPad Pro®. For a PC without a touchscreen, the touchpad or mouse can be used to sign the document.

Important Note

If there is any problem with the signature, the Client/Agent can select the Redo button to blank the signature field, and then write a new signature.

When an acceptable signature is entered, select **OK**.

Select **Save** at the bottom of the page to save both the **Consultation** or **Recheck** and the **Admission and Consent Form** to the **Patient Medical History**.

If you prefer to have the **Client/Agent** sign a hard copy of the **Admission and Consent Form**, enter **Procedure(s) for the Admission and Consent Form** on the **Consultation** or **Recheck** page.

Open the **Admission and Consent Form** and you or the **Client/Agent** can select from the two choices for any additional procedures, as preferred by the **Client/Agent**.

Select the **Open Signature Field** button. Then make an entry anywhere in the signature field, such as entering an X at the left side of the field, then select **OK**.

Select **Save** at the bottom of the page. This will bring you to either the **Consultation** or **Recheck** menu page.

Then select the green **Edit** icon in the **Consultation** or **Recheck** tile for the **Patient**, and select the **Admission and Consent Form** button to view the form as a digitally signed pdf document. The pdf document can be printed to be signed by the **Client/Agent**. We recommend that this hard copy be kept on file for legal documentation.

d) Master Problem List

Select **Master Problem List** from the dropdown list to open the **Master Problem List** page. Once the **Master Problem List** page is open there will be a search box and 3 buttons displayed: **Search**, **Add** and **Refresh**.

Search

To search for a **Patient's Master Problem List**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Master Problem Lists** for all **Patients** with that last name.

To display all the **Master Problem Lists** in the database in chronological order, going from most recent to oldest, leave the search box blank, then select **Search**.

To display more **Master Problem List** tiles per page, move the **Columns Count** slider to the right.

Add

To **Add** a new **Master Problem List** for a **Patient**, select **Add**.

Start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

Then select the **Patient** from the dropdown list.

If there is more than one **Master Problem List** template, select the **Master Problem List** template you wish to use from the dropdown list. The selected template will then be displayed in the **Notes** field.

Any **Template Tags** will be autofilled.

Alternatively, select **Add File** to download a **Master Problem List** file from your local drive that you have created in another application such as Microsoft Word®.

Notes can be added to the **Custom Template** box using a stylus for Windows® PC or Android® devices, or with a stylus or an Apple Pencil® for an iPad® or iPad Pro®.

Entries can also be made using a keyboard with a touchpad or mouse.

With handwriting recognition software on the computer or device, cursive writing can be converted to text.

With speech recognition software on the computer or device, speech can be converted to text.

The **Add File** button can also be used to add an image or video for the **Patient** from your local drive to be saved with your **Master Problem List**. Select the file, then select **Save** to attach the file to your medical record.

Select **Save** for your **Notes** along with any file attachments to be saved to the **Patient Medical History**.

Refresh

To update the **Master Problem List** database to the most current list, select the **Refresh** button. This provides an update if new **Master Problem Lists** have been added since you first started searching the **Master Problem List** database.

Tiles and icons

On the **Master Problem List** page there will be 9 **Master Problem List** tiles displayed by default. Across the top of each tile there will be from 3 to 6 icons displayed, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Master Problem List** tile in order to view that medical record as a digitally signed pdf document. This document can be printed. A listing of any attachments for each **Master Problem List** is also displayed and can be viewed by selecting the blue **Attachments** paperclip icon in the Adobe® sidebar menu.

Select the green **Edit** icon on the **Master Problem List** tile in order to make any changes to the **Master Problem List**. Select **Save** when all edits are completed.

Important Note

By default, **AutoLock Days** is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked, the grey Record Locked icon will be displayed and editing is no longer permitted.

Depending upon your **Role Permissions**, you may select the amber **Lock** icon if you wish to manually lock the **Master Problem List** file from any further entries. By selecting the amber **Lock** icon, the icon changes to the grey **Record Locked** icon.

Depending upon your **Role Permissions** and if the record is not locked, you may select the red **Delete** icon if you wish to delete the **Master Problem List** file from **ADC**.

If applicable, select the blue **Attachments** paperclip icon to view files attached to the **Patient's Master Problem List**. Select each **Attachment** icon to view each attached file.

e) Hospital Flowsheet and Notes

Select **Hospital Flowsheet and Notes** from the dropdown list to open the **Hospital Flowsheet and Notes** page. Once the **Hospital Flowsheet and Notes** page is open there will be a search box and 3 buttons displayed: **Search**, **Add** and **Refresh**.

Search

To search for a **Patient's Hospital Flowsheet and Notes**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Hospital Flowsheet and Notes** for all **Patients** with that last name.

To display all the **Hospital Flowsheet and Notes** in the database in chronological order, going from most recent to oldest, leave the Search box blank, then select **Search**.

To display more **Hospital Flowsheet and Notes** files per page, move the **Columns Count** slider to the right.

Add

To **Add** a new **Hospital Flowsheet** or **Hospital Notes** for a **Patient**, select **Add**. The date defaults to the current date, but can be changed to a future date if you are preparing a future **Hospital Flowsheet**.

Start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

Then select the **Patient** from the dropdown list,

Select the **Vet** from the dropdown list.

Select either the **Hospital Flowsheet** or the **Hospital Notes** template from the dropdown list. The selected template will then be displayed in the **Notes** field.

Entries can be made using a stylus for Windows® PC or Android® devices, or with a stylus or an Apple Pencil® for an iPad® or iPad Pro®.

Entries can also be made using a keyboard with a touchpad or mouse.

With handwriting recognition software on the computer or device, cursive writing can be converted to text.

With speech recognition software on the computer or device, speech can be converted to text.

For the **Hospital Flowsheet**, in order to highlight fields for entries to be made, first use a stylus or mouse to select whichever field or portions of rows or columns for the entries. Then select the yellow **HiLife** button to colorize the field or fields yellow.

The **Add File** button can also be used to add an image or video for the **Patient** from your local drive to be saved with your medical record. Select the file, then select **Save** to attach the file to your **Hospital Flowsheet** or **Hospital Notes**.

Select **Save** for your **Hospital Flowsheet** or **Hospital Notes** along with any file attachments to be saved to the **Patient Medical History**.

Refresh

To update the **Hospital Flowsheet and Notes** database to the most current list, select the **Refresh** button. This provides an update if a new **Hospital Flowsheet** or **Hospital Notes** have been added since you first started searching the **Hospital Flowsheet and Notes** database.

Tiles and icons

On the **Hospital Flowsheet and Notes** page there will be 9 **Hospital Flowsheet and Notes** tiles displayed, by default. Across the top of each tile there will be from 3 to 6 icons displayed, depending on your **Role**

Permissions.

Select the blue eye **View** icon on the **Hospital Flowsheet and Notes** tile in order to view that medical record as a digitally signed pdf document. This document can be printed. A listing of any attachments for each **Hospital Flowsheet and Notes** is also displayed and can be viewed by selecting the **Attachments** paperclip icon in the Adobe® sidebar menu.

Select the green **Edit** icon on the **Hospital Flowsheet Notes** tile in order to make any changes to the **Progress Notes**. Select **Save** when all edits are complete.

Important Note

By default, **AutoLock Days** is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked the grey Record Locked icon will be displayed and editing is no longer permitted.

Depending upon your **Role Permissions**, you may select the amber **Lock** icon if you wish to manually lock the **Hospital Flowsheet and Notes** file from any further entries. By selecting the amber **Lock** icon, the icon changes to the grey **Record Locked** icon.

Depending upon your **Role Permissions** and if the record is not locked, you may select the red **Delete** icon if you wish to delete the **Hospital Flowsheet and Notes** file from **ADC**.

If applicable, select the blue **Attachment** paper clip icon to view files attached to the **Patient's Hospital Flowsheet and Notes**. Select each **Attachment** icon to view each attached file.

f) Case Summary

On the **Medical Records** tab, select **Case Summary** for **Referring Vets** from the dropdown list to open the **Case Summary** page. Once the **Case Summary** page is open there will be a search box and 3 buttons displayed: **Search**, **Add**, and **Refresh**.

Search

To search for a **Patient's Case Summary**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Case Summary** for all **Patients** with that last name.

To display all the **Case Summaries** in the database in chronological order, going from most recent to oldest, leave the search box blank, then select **Search**.

To display more **Case Summary** files per page, move the **Columns Count** slider to the right.

Add

To **Add** a new **Case Summary** for a **Patient**, select **Add**.

Start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

Then select the **Patient** from the dropdown list.

Select the **Vet** from the dropdown list.

If there is more than one **Case Summary** template, select the **Case Summary** template you wish to use from the dropdown list. The selected template will then be displayed in the **Notes** field.

Any **Template Tags** will be autofilled.

Alternatively, select **Add File** to download a **Case Summary** file from your local drive you create in another application such as a Microsoft Word® document.

Entries can be made in the **Notes** field using a stylus for Windows® PC or Android® devices, or with a stylus or an Apple Pencil® for an iPad® or iPad Pro®.

Entries can also be made using a keyboard with a touchpad or mouse. With handwriting recognition software on the computer or device, cursive writing can be converted to text.

With speech recognition software on the computer or device, speech can be converted to text.

The **Add File** button can also be used to add an image or video file of your **Patient** from your local drive to be saved with your **Case Summary**. Once the file has been chosen, then select **Save** to attach the file to your **Case Summary**.

If applicable, select the **Add Row** button under the **Notes** field to add x-ray or digital photographic images to the **Case Summary**. The **Select Image** button will open locations for files on your local hard drive for selection of an image.

Important Note

An unlimited number of images can be added to a Case Summary by selecting the Add Row button again. When the Add Row button is selected again, the Row Position and Number of Rows interface opens. The Row Position is displayed as 2 by default and the Number of Rows is displayed as 1 by default. Either of these numbers can be changed for adding multiple rows for inserting images before selecting OK.

You can select any image file on your local hard drive to drag and drop onto an image field. Drop each image into each field on top of **Image may be dropped here**.

If an image is added in error, select the **Delete Image** button.

If you wish to delete a row of two images, select **Delete Row** and enter the row number.

Under each image that is added to the **Case Summary** there is a space to add notes about the image.

If you wish to print the **Case Summary**, select **Print Preview** at the bottom of the page. When **Print Preview** is selected, a digitally signed pdf is created for the user to review the page breaks of the **Case Summary** before the file is saved. If a page break needs to be added, place your cursor in the **Case Summary** where you wish to add one.

Then there are two ways to insert the page break:

1. A right-mouse click function can be done by holding the stylus on the screen or else doing a right-mouse click with a mouse, and this will display the dropdown menu that includes **Insert Page Break**. Select **Insert Page Break** from the menu and this will be added where the cursor has been placed in the **Case Summary**.
2. Scroll up to the text editor toolbar and select **Insert Page Break**, and this will be added where the cursor has been placed in the **Case Summary**.

Then select **Print Preview** again and check to see if the page break is in the correct place before selecting **Save**. Additional page breaks can be added as needed, and to remove ones added in the incorrect place, edit the **Case Summary** and delete the **[Page Break]** entry within the text.

Select **Save** at the bottom of the page for your **Case Summary** and any attached files and images to be saved to the **Patient Medical History**.

Refresh

To update the **Case Summary** database to the most current list, select the **Refresh** button. This provides an update if new **Case Summaries** have been added since you first started searching the **Case Summary** database.

Tiles and icons

On the **Case Summary** page there will be 9 **Case Summary** tiles displayed, by default. Across the top of each tile there will be from 3 to 7 icons displayed, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Case Summary** tile in order to view that medical record as a digitally signed pdf document. This document can be printed. A listing of any attachments for each **Case Summary** is also displayed and can be viewed by selecting the **Attachments** paperclip icon in the Adobe® sidebar menu.

Select the green **Edit** icon on the **Case Summary** tile in order to make any changes to the **Case Summary**. Select **Save** when all edits are complete.

Important Note

By default, AutoLock Days is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked, the grey Record Locked icon will be displayed and editing is no longer permitted.

Depending upon your **Role Permissions**, you may select the amber **Lock** icon if you wish to manually lock the **Case Summary** file from any further entries. By selecting the amber **Lock** icon, the icon changes to the grey **Record Locked** icon.

Depending upon your **Role Permissions** and if the record is not locked, you may select the red **Delete** icon if you wish to delete the **Case Summary** file from **ADC**.

If applicable, select the blue **Images** icon to view any x-ray or digital photo images that have been added to the **Case Summary**. These can also be printed or exported along with the **Case Summary**.

If applicable, select the blue **Attachment** paper clip icon to view any files attached to the **Case Summary**. Select each **Attachment** icon to view each attached file.

6. Medical Charts

Select the Medical Charts tab to open the dropdown list for **Medical Charts**.

The **Medical Charts** dropdown list is as follows:

- a) **Anesthetic Monitoring Chart**
- b) **Dental Chart**
- c) **Occlusal Dental Chart**
- d) **Bone and Soft Tissue Chart**

a) Anesthetic Monitoring Chart

Select **Anesthetic Monitoring Chart** on the dropdown list to open the **Anesthetic Monitoring Chart** page. Once the **Anesthetic Monitoring Chart** page is open there will be a search box and 3 buttons displayed: **Search**, **Add**, and **Refresh**.

Search

To search for a **Patient's Anesthetic Monitoring Chart**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Anesthetic Monitoring Charts** for all **Patients** with that last name.

To display all the **Anesthetic Monitoring Charts** in the database in chronological order, going from most recent to oldest, leave the search box blank, then select **Search**.

To display more **Anesthetic Monitoring Chart** tiles per page, move the **Columns Count** slider to the right.

Add

To **Add** a new **Anesthetic Monitoring Chart** for a **Patient**, select **Add**.

Important Note

A very important and practical feature of the Anesthetic Monitoring Chart is that once it is opened for data entry, it is running in its own window. With two windows open you can toggle back and forth between the Anesthetic Monitoring Chart and the ADC application. This means a Dental Chart or Bone and Soft Tissue Chart can be opened for data entry at the same time as the Anesthetic Monitoring Chart.

To view an example of the **Anesthetic Monitoring Chart** first page for data entry, please select the following link:

<http://animaldentalchart.com/anesthetic-monitoring-chart-first-page>

Select the **Veterinarian** and **Anesthetist** from the dropdown lists for the **Patient**.

Important Note

Veterinarians and Veterinary Technicians need to be added as Practice Users before they can be made available in the dropdown lists for Veterinarian and Anesthetist. For more information on how to add Practice Users, please see [Practice Users](#).

To select a **Client**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

Then select the **Patient** from the dropdown list.

Make entries in ALL applicable fields on the first page.

Important Note

An Induction time must be entered, as this will be used to define the time for entry of monitoring parameters on the second page. If you select Next without entering the Induction time, you will be prompted to make this entry.

There is the option of selecting the calculator symbol beside the **Patient ID** box for a **Calculator** to appear. Select the calculator symbol again for the **Calculator** to disappear.

If desired, select the syringe and needle symbol beside the **ASA Category** dropdown list to open the **Drug Quick Calculator**. This will open a document in Microsoft Excel® with a list of commonly used drugs during anesthesia, route of administration, the concentration of each drug, and a recommended low dose and high dose for each drug. These drugs are listed alphabetically from a to z, and emergency drugs are included. At the top of the **Drug Quick Calculator** document, enter a **Patient's** body weight in kilograms and this will automatically calculate the recommended low dose and high dose for that **Patient's** weight. This document can be minimized for quick access during anesthesia. This document can also be saved to attach to the **Patient's Medical History**.

Important Note

The Drug Quick Calculator list of drugs and dosing recommendations has been reviewed by a Diplomate of the American College of Veterinary Anesthesia and Analgesia. Please go to [Practice Settings](#) if you wish to customize the list.

When you select any dropdown field for entry of a **Premedication Drug**, **Induction Drug**, or **Local Anesthetic 1** or **2** on page 1, this will display a dropdown list of drugs. On first use, go to the **Add New Premedication Drug**, **Induction Drug**, or **Local Anesthetic** dropdown field to make an entry, and select the **Save** button. This will be added to the dropdown list. Then by selecting the drug from the dropdown list, this is automatically added to the dropdown field in the **Anesthetic Monitoring Chart**.

If an incorrect drug is accidentally selected, go to the **Clear Entry** line to clear the field. Select empty dropdown fields on Page 1 to add additional drugs in the same way.

Once **Premedication Drugs**, **Induction Drugs**, or **Local Anesthetics** have been added to the dropdown lists, they can be quickly selected to save having to re-enter the drug name again for each **Anesthetic Monitoring Chart**. These previous entries can also be edited or deleted by selecting the **Edit** or **Delete** icon to the left of the drug on the dropdown list.

At the bottom of the first page, **Preamanesthetic Notes** can be added. There is the option of selecting the **Insert Date/Time** button to insert the current date and local time as a line entry.

After making entries in ALL applicable fields on the first page, select **Next** at the bottom of the page to open the second page for entering monitoring parameters, **Continuous Rate Infusion (CRI)** agents administered, and **Notes**. Data entered on the first page will be saved automatically when you select **Next**.

To view an example the **Anesthetic Monitoring Chart** second page for data entry, please select the following link:
<http://animaldentalchart.com/anesthetic-monitoring-chart-second-page>

You have the option of selecting up to two **CRI** agents. There are four agents to select from for each **CRI** in the dropdown lists. Alternatively, you have the option of adding up to two of your own custom **CRI** agents and their rates of infusion.

You have the option of entering any or all monitoring parameters along with **Notes** for every five minute interval, starting from your previously entered induction time. You also have the option to change the temperature scale. There is no requirement for parameters to be entered in all five minute time slots as these should be done as is most practical for **Patient** safety.

If you wish to view trends for the monitoring parameters, select **View Graph** at the top of the page. This displays a graph of the parameters using internationally accepted symbols for anesthesia.

Once all of the **CRI** agents, monitoring parameters, and **Notes** have been added on the second page, select the **Save** button at the very bottom of the page.

If you need to return to the first page to add information, select **Previous**. All data entered on the second page will be saved automatically when you select **Previous**.

Select the **Save** button for the **Anesthetic Monitoring Chart** at the bottom of the second page before closing this window. This will exit the **Anesthetic Monitoring Chart** with the **ADC** application still running for your other **Chart**.

Select the **Cancel** button at the bottom of the second page to exit the **Anesthetic Monitoring Chart**.

Important Note

Selecting **Cancel** will exit the **Anesthetic Monitoring Chart**; but there is an **Autosave** feature built into the **Chart**. This will save all changes being made to the **Chart** every minute. By selecting **Cancel** this does not erase the **Anesthetic Monitoring Chart**. For more information, please see [Recovering autosaved data](#).

Refresh

To update the **Anesthetic Monitoring Chart** database to the most current list, select the **Refresh** button. This provides an update if new **Anesthetic Monitoring Charts** have been added since you first started searching the **Anesthetic Monitoring Chart** database.

Tiles and icons

On the **Anesthetic Monitoring Chart** page there will be 9 **Anesthetic Monitoring Chart** tiles displayed, by default. Across the top of each tile there will be from 3 to 5 icons displayed, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Anesthetic Monitoring Chart** tile in order to view that medical record as a digitally signed pdf document. The pdf document displays all the data entered on the first and second pages with parameters displayed in a chart format using international symbols. The next page of the pdf document displays the **Notes** that were added to the **Anesthetic Monitoring Chart**.

To view an example the **Anesthetic Monitoring Chart** pdf document, please select the following link:

<http://animaldentalchart.com/anesthetic-monitoring-chart>

Select the green **Edit** icon to make any changes to the **Anesthetic Monitoring Chart**. Select the **Save** button at the bottom of the second page to save any changes.

Important Note

By default, AutoLock Days is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked, the grey Record Locked icon will be displayed and editing is no longer permitted.

Select the blue **Export** icon to export the **Anesthetic Monitoring Chart** as a pdf or Word® document. This document can also be printed.

Depending upon your **Role Permissions**, you may select the amber **Lock** icon if you wish to manually lock the **Anesthetic Monitoring Chart** from any further entries. By selecting the amber **Lock** icon, the icon changes to the grey **Record Locked** icon.

Depending upon your **Role Permissions** and if the record is not locked, you may select the red **Delete** icon if you wish to delete the **Anesthetic Monitoring Chart** from **ADC**.

b) Dental Chart

On the **Medical Records** menu page, select the **Dental Chart** menu option to open the **Dental Chart** page. Once the **Dental Chart** page is open there will be a **Search** box and 4 buttons displayed: **Search**, **Add**, **Refresh** and **Data Analysis**. For more information on **Data Analysis**, please see [Data Analysis](#).

Search

To search for a **Patient's Dental Chart**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Dental Charts** for all **Patients** with that last name.

To display all the **Dental Charts** in the database in chronological order, going from most recent to oldest, leave the Search box blank, then select **Search**.

To display more **Dental Chart** tiles per page, move the **Columns Count** slider to the right.

Add

To **Add** a new **Dental Chart** for a **Patient**, select **Add**.

The **Dental Chart** opens with the **Patient/Notes** tab selected. To view an example of a **Dental Chart Patient/Notes** tab with data entry, please select the following link:

http://animaldentalchart.com/dental_chart_patient_notes_tab

To select a **Client**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

Then select the **Patient** from the dropdown list.

Then select the **Vet** from the dropdown list for this **Patient**.

If chosen in **Practice Settings**, enter the **PI** (Plaque Index) and **CI** (Calculus Index) ranges for all four quadrants.

Select the **Dentition Type** from the dropdown list. Select **Permanent Dentition** if there are any permanent teeth present, otherwise select **Deciduous Dentition** if there are only deciduous teeth present.

Enter your assessment for the **Occlusion**. If the **Occlusion** is not normal, select all that apply:

MAL1, MAL2, MAL3, MAL4, CB/R, CB/C

If there is a malocclusion, select if it is functional or not (**Yes/No**).

Notes can be added to describe any abnormal findings. There is the option of selecting the **Insert Date/Time** button to insert the current date and local time as a line entry in the **Notes** field.

At the top of the page select the tab for the **Left Maxilla, Left Mandible, Right Maxilla, or Right Mandible**.

Important Note

Client and Patient information, Dentition Type, and Malocclusion information must be entered prior to navigating to one of the quadrant views.

To view an example of a **Dental Chart Quadrant** tab with data entry, please select the following link:

http://animaldentalchart.com/dental_chart_quadrant-tab

Once a quadrant has been selected, entries for all fields (measurements, **Stage or Index, Diagnosis and Procedure**) can be made by selecting the **modified Triadan number** on the top row as this highlights all fields for the selected tooth.

For more information on how to make these entries, please refer to the following sections: [Entering periodontal measurements](#), [Entering a Stage or Index](#), [Entering a Diagnosis](#), and [Entering a Procedure](#).

Important Note

The same Stage, Index, Diagnosis or Procedure can be entered for multiple teeth to allow for fast charting. For more information on how to do this, please see [Making an entry for multiple teeth](#).

Once all entries have been made in the first quadrant, select the tabs across the top of the page to continue charting the other three quadrants.

To open the **Bone and Soft Tissue Chart** for a **Patient** from within the **Dental Chart**, select the **Launch Bone and Soft Tissue Chart with Occlusion Assessment** button at the bottom of the page. Once the new **Bone and Soft Tissue Chart** is complete, select **Save** at the very bottom of the page. This returns to the **Dental Chart** for the **Patient**. For more information, please see [Bone and Soft Tissue Chart](#).

Once ALL the charting is done for all four quadrants, there are four choices at the very bottom of the page: **Apply**, **Edit Image**, **Save**, and **Cancel**. If desired, select **Apply** to make the color changes to the **Dental Chart** for the quadrant. It will display the color changes to the tooth images in the quadrant that is open. This button can be selected at any time to view the color changes. This gives a visual key for **Diagnosis** or **Procedure** selections for each tooth.

The color key is as follows:

Pathology/ Abnormality – YELLOW (like a yellow highlighter)
Missing Tooth – WHITE (like Wite-out® correction fluid has been applied)
Oral Surgery – RED (like blood)
Periodontics – PURPLE (“P” for perio)
Endodontics – ORANGE (like gutta percha)
Restoration/Prosthodontics – GREEN (like new growth)
Orthodontics – BLUE (like flowing water)

If you wish to draw lesions or to add freehand notes to the images of the dentition, select the **Edit Image** button. This opens that quadrant view in Microsoft Paint. Once all annotations are added to the image select **Save** and **Close**, this will display the annotations on the quadrant view. For more information, please see [Edit Image](#).

Important Note

It is not required to select Apply or Edit image.

Select the **Save** button to save all changes to the **Dental Chart**. This exits to the **Dental Chart** page with the new **Patient** file displayed.

Select the **Cancel** button to exit the **Dental Chart** and return to the **Dental Chart** page.

Important Note

Selecting Cancel will exit the Dental Chart; but there is an Autosave feature built into the Chart. This will save all changes being made to the chart every minute. By selecting Cancel this does not erase the Dental Chart. For more information, please see [Recovering autosaved data](#).

Entering periodontal measurements

Depending upon the selection in **Practice Settings**, either the **PAL** (Periodontal Attachment Loss) and the **PPD** (Periodontal Probing Depth) can be recorded for each tooth, or the **PPD** (Periodontal Probing Depth) and the **GR/E** (Gingival Recession/Enlargement) can be recorded for each tooth.

To enter the measurements for each tooth, select the **modified Triadan number** on the top row. This will highlight the fields for this tooth to enter the measurements in mm (0, .5, 1, 2, 3, 4, 5, 6, 7, 8, 9 etc.) for the **M** (Mesial), **B/LAB** (Buccal/ Labial), **D** (Distal), and **P** or **L** (Palatal or Lingual) surfaces for each tooth.

The **PAL** (Periodontal Attachment Loss) or the **PPD** (Periodontal Probing Depth) is entered in the left field, and the **PPD** (Periodontal Probing Depth) or the **GR/E** (Gingival Recession/Enlargement) is entered in the right field. When entering the **GR/E** in the right field, the default measurement is for **GR** as clinically this is a more common measurement than **GE**. When a number is entered it will have a "-" sign automatically added before the number to indicate loss of gingiva with **GR**.

If you wish to record **GE** for any one of the four sides of a tooth, enter a "+" sign, then the number for the mm measurement. Alternatively, you can enter a "+" sign after adding the mm measurement.

If an error is made in entering a "+" sign, place your cursor anywhere in the right field and enter a "-" sign to make the correction.

If there is no **GR** or **GE** for any one of the four sides of a tooth, enter a zero mm measurement in each of the corresponding right fields.

Entering a Stage or Index

Select the **modified Triadan number** on the bottom row for the tooth you wish to chart.

Important Note

For multiple teeth with the same Stage or Index, select multiple modified Triadan numbers on the bottom row. For more information, please see [Making an entry for multiple teeth](#).

Select from the dropdown list the **Stage** or **Index** for each tooth, as selected in **Practice Settings**.

If you make an entry in error, place your cursor to the right of the number and select Backspace to delete it.

Entering a Diagnosis

Select the **modified Triadan number** on the bottom row for the tooth you wish to chart.

Select the **Diagnosis** page icon for that tooth to open a **Diagnosis** menu.

Important Note

For multiple teeth with the same Diagnosis or Diagnoses, select multiple modified Triadan numbers on the bottom row. For more information, please see [Making an entry for multiple teeth](#).

You can check a **Category** box for the **Diagnosis** to make the selection from a smaller subset of abbreviations.

Then you have a choice of starting to enter the letters for the abbreviation in the **Search by Abbreviation** box, and this will perform an Ajax search for the abbreviation. As you make your entry, the list of possible abbreviations is narrowed down.

The other choice is starting to enter the medical description in the **Search by Medical Description** box, and this will perform an Ajax search for the medical description. As you make your entry, the list of possible medical descriptions is narrowed down.

Select one or more checkboxes that apply for the **Diagnosis**. Then select **Save** in the **Diagnosis** menu.

Important Note

If you plan to do a follow-up treatment for one or more teeth, select the Diagnosis abbreviation “TBT” for “To be treated” for each tooth, as indicated. After selecting Apply or Save, each tooth will be colorized with a red outline.

Entering a Procedure

To enter a **Procedure**, select the **modified Triadan number** on the bottom row, for the tooth you wish to chart. Select the **Procedure** page icon for that tooth to open a **Procedure** menu.

Important Note

For multiple teeth with the same Procedure or Procedures, select multiple modified Triadan numbers on the bottom row. For more information, please see [Making an entry for multiple teeth](#).

You can check a **Category** box for the **Procedure** to make the selection from a smaller subset of abbreviations.

You have a choice of starting to enter the letters for the abbreviation in the **Search by Abbreviation** box, and this will perform an Ajax search for the abbreviation. As you make your entry, the list of possible abbreviations is narrowed down.

The other choice is starting to enter the medical description in the **Search by Medical Description** box, and this will perform an Ajax search for the medical description. As you make your entry, the list of possible medical descriptions is narrowed down.

Select one or more checkboxes that apply for the **Procedure**. Then select **Save** in the **Procedure** menu.

Important Note

If multiple Procedures have been selected for a tooth, the colorization will be for the Procedure selected last.

The color key is as follows:

Pathology/ Abnormality – YELLOW (like a yellow highlighter)

Missing Tooth – WHITE (like Wite-out® correction fluid has been applied)

Oral Surgery – RED (like blood)

Periodontics – PURPLE (“P” for perio)

Endodontics – ORANGE (like gutta percha)

Restoration/Prosthodontics – GREEN (like new growth)

Orthodontics – BLUE (like flowing water)

Entering a Procedure Done Previously

For a **Procedure** that was previously done such as root canal therapy for a tooth or teeth, select the **modified Triadan number** for the tooth or teeth, then select the **Procedure** page icon to open the abbreviation selection.

Enter the **Procedure** abbreviation in the **Search by Abbreviation** box followed by a single asterisk. Then select **Save** in the **Procedure** menu.

Select **Save** at the bottom of the page to save the **Procedure** that was done previously for the selected tooth or teeth.

For the saved **Dental Chart**, each **Procedure** that was done previously will be displayed for the tooth or teeth as it was entered with an asterisk following the **Abbreviation**.

An entry will automatically be entered and displayed in **Notes**:

*** DONE PREVIOUSLY**

For the saved **Occlusal Dental Chart**, each previously done **Procedure** will be displayed for the tooth or teeth **DONE PREVIOUSLY** added at the end of the **Medical Description**.

For the saved **Dental Summary Chart**, each previously done **Procedure** will be displayed for the tooth or teeth with **DONE PREVIOUSLY** added at the end of the **Lay Description**.

Deleting a Diagnosis or Procedure

If you need to delete a **Diagnosis** or **Procedure** entry for a tooth, select the **modified Triadan number** for the tooth or teeth, then select the **Diagnosis** or **Procedure** page icon to open the abbreviation selection.

Find the **Diagnosis** or **Procedure** abbreviation or abbreviations previously checked, and uncheck the box or boxes.

Select **Save** at the bottom of the page. This will remove that **Diagnosis** or **Procedure** for the selected tooth or teeth.

Making an entry for multiple teeth

A very important and practical feature of the **Dental Chart** is that multiple teeth can be assigned the same **Stage**, **Index**, **Diagnosis**, or **Procedure** at the same time.

For multiple teeth with the same **Stage** or **Index**, select ALL applicable **modified Triadan numbers** on the bottom row. If all teeth in the quadrant are the same, then choose **Select All** to the right to highlight all of the teeth. Then select from the dropdown list the **Stage** or **Index** that applies to all these teeth. If you make an entry in error, place your cursor to the right of the number and select Backspace to delete it.

For multiple teeth with the same **Diagnosis/Diagnoses** or **Procedure/Procedures**, select ALL applicable **modified Triadan numbers** on the bottom row. If all teeth in the quadrant are the same, then choose **Select All** to the right to highlight all of the teeth.

Then select a **Diagnosis** or **Procedure** page icon for one of these teeth, and this opens an interface to select one or more checkboxes that apply to ALL the selected teeth. When you select **Save**, the **Diagnosis/Diagnoses** or **Procedure/Procedures** are applied to ALL the selected teeth.

After entering the **Stage** or **Index**, **Diagnosis**, or **Procedure** for multiple teeth, choose **Unselect** to turn off the highlighted teeth in order to edit other teeth in the quadrant, as applicable.

Edit Image

When **Edit Image** is selected, the quadrant dentition image is opened in the Microsoft Paint® program. Once the image is open, free-hand annotations can be made using all available tools within the Microsoft Paint® program.

A common example of an annotation is to use a pencil tool to draw the location of a fracture of a tooth. Another example is to draw a persistent deciduous tooth next to its permanent counterpart.

Important Note

We recommend adding annotations to both the buccal/labial and palatal/lingual views of teeth, as applicable.

Once all of the annotations are made using the Microsoft Paint® program, select **Save** and then **Close** on the upper left menu of this program. This will display these annotations on the quadrant page.

Additional annotations can be added at any time by selecting the **Edit Image** button. This will once again open the quadrant dentition image in the Microsoft Paint® program. Once all of the additional annotations are made, select **Save** and then **Close** on the upper left menu of this program. This will display the newly added annotations on the quadrant page.

To view an example of a **Dental Chart** quadrant image that has been edited within the Microsoft Paint® program, please select the following link: http://animaldentalchart.com/dental_chart-edit-image

Recovering autosaved data

There is an autosave feature built into the **Anesthetic Monitoring Chart** as well as the **Dental Chart**. When the **Chart** is autosaving, a yellow rectangle flashes with the word **Autosaving** at the top of the second page for the **Anesthetic Monitoring Chart** or on the top of any quadrant tab within the **Dental Chart**. This yellow rectangle appears every minute as the **Chart** is being autosaved.

If you select **Cancel** in error instead of selecting **Save** or if your computer or device freezes up or crashes out of the **ADC** application for any reason, the data for the **Anesthetic Monitoring Chart** or **Dental Chart** is still accessible.

The next time you select the **Anesthetic Monitoring Chart** or **Dental Chart** menu option, an interface will open as follows.

An autosaved Anesthetic Monitoring Chart/Dental Chart has been created for [Patient Name] [Client Last Name] on [Date in Preferred Date Format] at HH:MM AM/PM.

Do you wish to review and save the Chart now?

[Yes] [No]

If you select **Yes**, the autosaved **Chart** will open for you to review, make any edits, and select **Save** on the final page.

The other option is to select **No** and the autosaved **Chart** will still be available for review, any editing, and saving the next time you select the **Anesthetic Monitoring Chart** or **Dental Chart** menu option.

Refresh

To update the **Dental Chart** database to the most current list, select the **Refresh** button. This provides an update if new **Dental Charts** have been added since you first started searching the **Dental Chart** database.

Tiles and icons

On the **Dental Chart** page there will be 9 **Dental Chart** tiles displayed, by default. Across the top of each tile there will be from 4 to 6 icons displayed, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Dental Chart** tile in order to view that medical record as a digitally signed pdf document. This document can be printed.

To view an example of a **Dental Chart** digitally signed pdf document, please select the following link:

http://animaldentalchart.com/dental_chart

Select the green **Edit** icon to make any changes to the **Dental Chart**. If any changes are made to the **Diagnosis** or **Procedure** abbreviations in any quadrant, selecting the **Apply** button updates the colors for the quadrant without overwriting any annotations you have made for the image of the quadrant. Select **Save** when all edits are complete.

Important Note

By default, AutoLock Days is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked, the grey Record Locked icon will be displayed and editing is no longer permitted.

Select the green **Duplicate** icon if you wish to open a duplicate of a previously created **Dental Chart** with the current date. Edits can be made to this new chart that do not change the previously created **Dental Chart**. For more information on duplicating a **Dental Chart**, please see [Duplicate Chart](#).

Select the blue **Export** icon to export the **Dental Chart** as a pdf or Word® document. This document can also be printed.

Depending upon your **Role Permissions**, you may select the amber **Lock** icon if you wish to manually lock the **Dental Chart** from any further entries. By selecting the amber **Lock** icon, the icon changes to the grey **Record Locked** icon.

Depending upon your **Role Permissions** and if the record is not locked, you may select the red **Delete** icon if you wish to delete the **Dental Chart** from **ADC**.

c) Occlusal Dental Chart

On the **Medical Records** menu page, select the **Occlusal Dental Chart** menu option to open the **Occlusal Dental Chart** page. Once the **Occlusal Dental Chart** page is open, there will be a search box and 2 buttons displayed: **Search**, and **Refresh**.

Important Note

The Occlusal Dental Chart is automatically generated for a Patient whenever a Dental Chart is created.

The first page of the **Occlusal Dental Chart** displays an occlusal view of the maxillary and mandibular dentition along with the anatomic names and modified Triadan numbers.

Important Note

If the Diagnosis DT (Deciduous tooth) or DT/P (Deciduous tooth/persistent) has been previously selected for any tooth in the Dental Chart, it will be listed with its modified Triadan number, and a Procedure will also be listed if one has been selected for any of these teeth.

The second page and beyond for the **Occlusal Dental Chart** gives medical descriptions for each **Diagnosis** and **Procedure** selected for individual teeth. The **Diagnosis** on the left and **Procedure** on the right are listed sequentially for individual teeth.

To view an example of a **Dental Chart** with its automatically created **Occlusal Dental Chart**, please select the following link:

http://animaldentalchart.com/dental_chart_with_occlusal_dental_chart

Search

To search for a **Patient's Occlusal Dental Chart**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all the **Occlusal Dental Charts** for all **Patients** with that last name.

To display all the **Occlusal Dental Charts** in the database in chronological order, going from most recent to oldest, leave the search box blank, then select **Search**.

To display more **Occlusal Dental Chart** tiles per page, move the **Columns Count** slider to the right.

Refresh

To update the **Occlusal Dental Chart** database to the most current list, select the **Refresh** button. This provides an update if new **Occlusal Dental Charts** have been created since you first started searching the **Occlusal Dental Chart** database.

Tiles and icons

On the **Occlusal Dental Chart** page there will be 9 **Occlusal Dental Chart** tiles displayed, by default. Across the top of each tile there will be three to four, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Occlusal Dental Chart** tile in order to view that medical record as a digitally signed pdf document. This document can be printed.

Select the green **Edit** icon to open the image of the **Occlusal Dental Chart** in the Microsoft Paint® program. Use this program to draw lesions such as occlusal caries lesions or to add freehand notes to the image. Select the **Save** button at the very bottom to save changes to the image.

Important Note

By default, AutoLock Days is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked, the grey Record Locked icon will be displayed and editing is no longer permitted.

Select the blue **Export** icon on the **Occlusal Dental Chart** tile in order to export the **Occlusal Dental Chart** as a pdf or Word® document. This document can also be printed.

d) Bone and Soft Tissue Chart

Select **Bone and Soft Tissue Chart** on the dropdown list to open the **Bone and Soft Tissue Chart** page. Once the **Bone and Soft Tissue Chart** page is open there will be a search box and 4 buttons displayed: **Search**, **Add**, **Refresh** and **Data Analysis**. For more information on **Data Analysis**, please see [Data Analysis](#).

Search

To search for a **Patient's Bone and Soft Tissue Chart**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Bone and Soft Tissue Charts** for all **Patients** with that last name.

To display all the **Bone and Soft Tissue Charts** in the database in chronological order, going from most recent to oldest, leave the search box blank, then select **Search**.

To display more **Bone and Soft Tissue Chart** tiles per page, move the **Columns Count** slider to the right.

Add

To **Add** a new **Bone and Soft Tissue Chart** for a **Patient**, select **Add**.

The **Bone and Soft Tissue Chart** opens with the **Patient/Notes** tab selected. To view an example of a **Bone and Soft Tissue Chart Patient/Notes** tab with data entry, please select the following link:

http://animaldentalchart.com/bone_and_soft_tissue_chart_patient_notes_tab

To select a **Client**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

Then select the **Patient** from the dropdown list.

Then select the **Vet** from the dropdown list for this **Patient**.

Select the **Dentition Type** from the dropdown list. Select **Permanent Dentition** if there are any permanent teeth present, otherwise select **Deciduous Dentition** if there are only deciduous teeth present. Enter your assessment for the **Occlusion**.

Notes can be entered to describe any abnormal findings. There is the option of selecting the **Insert Date/Time** button to insert the current date and local time as a line entry in the **Notes** field.

Select the **Diagnosis** button to open a **Diagnosis** menu. You can check a **Category** box for the **Diagnosis** to make the selection from a smaller subset of abbreviations.

To search for a diagnosis, start to enter the letters for the abbreviation in the **Search by Abbreviation** box, and this will perform an Ajax search for the abbreviation. As you make your entry, the list of possible abbreviations is narrowed down.

Start to enter the medical description in the **Search by Medical Description** box, and this will perform an Ajax search for the medical description. As you make your entry, the list of possible medical descriptions is narrowed down. Select one or more checkboxes that apply for the **Diagnosis**. Then select **Save** in the **Diagnosis** menu.

Select the **Procedure** button to open a **Procedure** menu. You can check a **Category** box for the **Procedure** to make the selection from a smaller subset of abbreviations.

To search for a procedure, start to enter the letters for the abbreviation in the **Search by Abbreviation** box, and this will perform an Ajax search for the abbreviation. As you make your entry, the list of possible abbreviations is narrowed down.

Start to enter the medical description in the **Search by Medical Description** box, and this will perform an Ajax search for the medical description. As you make your entry, the list of possible medical descriptions is narrowed down.

Select one or more checkboxes that apply for the **Procedure**. Then select **Save** in the **Procedure** menu.

Select the **Image** tab at the top to open the image of the skull and soft tissue views for the **Patient**. The image can be scaled to enlarge it for viewing detail.

Select the **Edit Image** button to open the image of the skull and soft tissue views in Microsoft Paint®. Use this program to draw lesions or add freehand notes to the image.

Once all the annotations are made with the Microsoft Paint® program, select **Save** and then **Close** on the upper left corner of the menu. This will return you to the previous screen with the edited version of the image.

Once all annotations and notes are made, select the **Save** button at the very bottom of the screen.

Refresh

To update the **Bone and Soft Tissue Chart** database to the most current list, select the **Refresh** button. This provides an update if new **Bone and Soft Tissue Charts** have been added since you first started searching the **Bone and Soft Tissue Chart** database.

Tiles and icons

On the **Bone and Soft Tissue Chart** page there will be 9 **Bone and Soft Tissue Chart** tiles displayed, by default. Across the top of each tile there will be from 3 to 6 icons displayed, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Bone and Soft Tissue Chart** tile in order to view this medical record as a digitally signed pdf document. This document can be printed.

To view an example of a **Bone and Soft Tissue Chart** as a digitally signed pdf document, please select the following link:

http://animaldentalchart.com/bone_and_soft_tissue_chart

Select the green **Edit** icon on the **Bone and Soft Tissue Chart** tile in order to make any changes to the **Bone and Soft Tissue Chart**. Select **Save** when all edits are complete.

Important Note

By default, AutoLock Days is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked the grey Record Locked icon will be displayed and editing is no longer permitted.

Select the green **Duplicate** icon if you wish to open a duplicate of a previously created **Bone and Soft Tissue Chart** with the current date. Edits can be made to this new chart without changing the previously created **Bone and Soft Tissue Chart**. For more information on duplicating a **Bone and Soft Tissue Chart**, please see [Duplicate Chart](#).

Select the blue **Export** icon on the **Bone and Soft Tissue Chart** tile in order to export the **Bone and Soft Tissue Chart** as a pdf or Word® document. This document can also be printed.

Depending upon your **Role Permissions**, you may select the amber **Lock** icon if you wish to manually lock the **Bone and Soft Tissue Chart** from any further entries. By selecting the amber **Lock** icon, the icon changes to the grey **Record Locked** icon.

Depending upon your **Role Permissions** and if the record is not locked, you may select the red **Delete** icon if you wish to delete the **Bone and Soft Tissue Chart** from **ADC**.

Duplicate Chart

By selecting the green **Duplicate** icon on a **Patient's Dental Chart** or **Bone and Soft Tissue Chart** tile, this duplicates the previously created and saved **Chart** with the current date. This new duplicate chart will contain previous entries from the selected **Chart**.

On the **Medical Records** menu page, select the **Dental Chart** menu option to duplicate a **Dental Chart**, or select the **Bone and Soft Tissue Chart** menu option to duplicate a **Bone and Soft Tissue Chart**.

To select a **Client**, start entering two or more first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Charts** for all **Patients** with that last name.

An unlocked or locked **Dental Chart** or **Bone and Soft Tissue Chart** can be duplicated.

Important Note

If there is more than one **Dental Chart** or **Bone and Soft Tissue Chart** tile for the same **Patient**, as they have had multiple dental procedures, select the **Duplicate** button on the tile that has the most recent date.

When the **Duplicate** button is selected, an **ADC** Notice appears as follows:

This will be duplicated as a new, editable Chart with today's date, and will contain previous entries. Are you sure you wish to duplicate this Chart?
Select **OK** to create a duplicate **Chart**.

Important Note

This is a new **Chart** with the previous entries duplicated. Edits can be made and this will not result in any changes for the previous **Charts**.

Any tooth that previously had the Procedure X, XS, or XSS (Extraction) will have all its **Diagnosis** and **Procedure** abbreviations automatically removed from the duplicate **Dental Chart**, and the **Diagnosis** T/M (Missing tooth) will be added.

Any tooth that previously had the Procedure CR/A (Crown amputation) will have all its **Diagnosis** and **Procedure** abbreviations automatically removed from the duplicate **Dental Chart**, and the **Diagnosis** TR5 (Tooth resorption stage 5) will be added.

Any tooth that previously had the Diagnosis T/SN (supernumerary tooth) with the Procedure X, XS, or XSS (Extraction) will have all its Diagnosis and Procedure abbreviations automatically removed from the duplicate Dental Chart.

Any tooth that previously had the Diagnosis DT/P (persistent deciduous tooth) with the Procedure X, XS, or XSS (Extraction) will have all its Diagnosis and Procedure abbreviations automatically removed from the duplicate Dental Chart.

Other than the above, all Dental Procedures will be displayed followed by an asterisk (*) to indicate they were done previously.

When a new procedure is added for any tooth in the duplicate Dental Chart, it is recommended to remove the Diagnosis Abbreviation TBT along with any other Diagnosis or Procedure Abbreviations that no longer apply to any tooth.

Select **Save** once all edits have been made to the duplicate **Chart**.

e) Data Analysis

On the upper right of the **Dental Chart** menu page or the **Bone and Soft Tissue Chart** menu page select **Data Analysis** to search for and analyze **Patients** with specific **Diagnoses** or **Procedures** for the **Dental Charts** or **Bone and Soft Tissue Charts** in your **ADC** database.

You have the option of selecting one or more diagnoses by selecting **Diagnosis**, opening the **Diagnosis** interface to select the abbreviation(s).

You have the option of selecting one or more procedures by selecting **Procedure**, opening the **Procedure** interface to select the abbreviation(s).

You can search by both a **Diagnosis** and **Procedure** or multiple **Diagnoses** and **Procedures** at the same time.

Select the checkbox if you wish to filter only those **Dental Charts** or **Bone and Soft Tissue Charts** that contain all the **Abbreviations**.

You have the option of selecting the **Species** as **Canine**, **Feline**, or **All** and can manually enter a **Breed**.

You have the option of selecting the **Sex** as **Male**, **Male Neutered**, **Female**, **Female Spayed**, or **All**. You can select multiple.

You have the option of selecting a **Date Range** to search.

The default **Age Range** is **All**. You have the option to unselect the checkbox to define the **Age Range** at the time of the **Diagnosis** or **Procedure**.

When **Search** is selected, the **Data Analysis** will be displayed for all the set filters. The **Data Analysis** is exportable as a Microsoft Excel® file by selecting the **Export to Excel** button.

There is the option to view each **Dental Chart** or **Bone and Soft Tissue Chart** by selecting the blue eye **View** icon.

There is also the option to edit each **Dental Chart** or **Bone and Soft Tissue Chart** by selecting the green **Edit** icon. This can be done if you have the **Role Permission** to edit, and the medical record is not locked.

Important Note

By default, **AutoLock Days** is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked, the grey Record Locked icon will be displayed and editing is no longer permitted.

7. Client Charts/Education

Select the **Client Charts/Education** tab to open the dropdown list for **Client Charts/Education**.

The **Client Charts/Education** dropdown list is as follows:

- a) Dental Summary Chart**
- b) Bone and Soft Tissue Summary Chart**
- c) Discharge Summary**
- d) Client Education**
- e) Annotated Client Education**

a) Dental Summary Chart

Select **Dental Summary Chart** from the dropdown list to open the **Dental Summary Chart** page. Once the **Dental Summary Chart** page is open there will be a search box and 2 buttons displayed: **Search** and **Refresh**.

Important Note

The Dental Summary Chart is automatically generated for a Patient whenever a Dental Chart is created. It automatically converts medical to lay descriptions for the Diagnosis and Procedure Abbreviations for Clients to understand.

The first page of the **Dental Summary Chart** displays an occlusal view of the maxillary and mandibular dentition along with the anatomic names and modified Triadan numbers. This is the same page as the first page of the **Occlusal Dental Chart**.

Important Note

If the Diagnosis DT (Deciduous tooth) or DT/P (Deciduous tooth/persistent) has been previously selected for any tooth in the Dental Chart, the modified Triadan number for the deciduous tooth will be displayed on this Dental Summary Chart in place of the permanent tooth modified Triadan number.

The second page and beyond for the **Dental Summary Chart** gives lay descriptions versus the medical descriptions in the **Occlusal Dental Chart** for **Diagnosis** and **Procedure** selected for individual teeth. The **Diagnosis** on the left and **Procedure** on the right is listed sequentially for individual teeth.

Search

To search for a **Patient's Dental Summary Chart**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all the **Dental Summary Charts** for all **Patients** with that last name.

To display all the **Dental Summary Charts** in the database in chronological order, going from most recent to oldest, leave the search box blank, then select **Search**.

To display more **Dental Summary Chart** tiles per page, move the **Columns Count** slider to the right.

Refresh

To update the **Dental Summary Chart** database to the most current list, select the **Refresh** button. This provides an update if new **Dental Summary Charts** have been created since you first started searching the **Dental Summary Chart** database.

Tiles and icons

On the **Dental Summary Chart** page there will be 9 **Dental Summary Chart** tiles displayed. Across the top of each tile there will be 2 to 3 icons displayed.

Select the blue eye **View** icon on the **Dental Summary Chart** tile in order to view that medical record as a digitally signed pdf document. This document can be printed.

Important Note

By default, the Dental Summary Chart is selected to be viewable to Clients for their own Patient(s) when they login to your Practice Portal. For more information on your Practice Portal, please see [Practice Portal](#).

For more information on how to change Role Permissions to prevent Clients from seeing the Dental Summary Chart, please see [Role Permissions](#).

Select the blue **Export** icon in order to export the **Dental Summary Chart** as a pdf or Word® document to another application. This document can be printed.

b) Bone and Soft Tissue Summary Chart

Select **Bone and Soft Tissue Summary Chart** from the dropdown list to open the **Bone and Soft Tissue Summary Chart** page. Once the **Bone and Soft Tissue Summary Chart** page is open there will be a search box and 2 buttons displayed: **Search** and **Refresh**.

Important Note

The Bone and Soft Tissue Summary Chart is automatically generated for a Patient whenever a Bone and Soft Tissue Chart is created. It automatically converts medical to lay descriptions for the Diagnosis and Procedure Abbreviations for Clients to understand.

Search

To search for a **Patient's Bone and Soft Tissue Summary Chart**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Bone and Soft Tissue Summary Charts** for all **Patients** with that last name.

To display all the **Bone and Soft Tissue Summary Charts** in the database in chronological order, going from most recent to oldest, leave the Search box blank, then select **Search**.

To display more **Bone and Soft Tissue Summary Chart** tiles per page, move the **Columns Count** slider to the right.

Refresh

To update the **Bone and Soft Tissue Summary Chart** database to the most current list, select the **Refresh** button. This provides an update if new **Bone and Soft Tissue Summary Charts** have been added since you first started searching the **Bone and Soft Tissue Summary Chart** database.

Tiles and icons

On the **Bone and Soft Tissue Summary Chart** page there will be 9 **Bone and Soft Tissue Summary Chart** tiles displayed, by default. Across the top of each tile there will be 2 icons displayed.

Select the blue eye **View** icon to display that **Bone and Soft Tissue Summary Chart** as a digitally signed pdf document. This document can be printed.

Important Note

By default, the Dental Summary Chart is selected to be viewable by Clients for their own Patient(s) when they login to your Practice Portal. For more information on your Practice Portal, please see [Practice Portal](#).

Select the blue **Export** icon on the **Bone and Soft Tissue Summary Chart** tile in order to export the **Bone and Soft Tissue Summary Chart** as a pdf or Word® document. This document can also be printed.

c) Discharge Summary

On the **Client Charts/ Education** tab, select **Discharge Summary** from the dropdown list to open the **Discharge Summary** page. Once the **Discharge Summary** page is open there will be a search box and 3 buttons displayed: **Search**, **Add**, and **Refresh**.

Search

To search for a **Patient's Discharge Summary**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Discharge Summary** for all **Patients** with that last name.

To display all the **Discharge Summaries** in the database in chronological order, going from most recent to oldest, leave the search box blank, then select **Search**.

To display more **Discharge Summary** tiles per page, move the **Columns Count** slider to the right.

Add

To **Add** a new **Discharge Summary** for a **Patient**, select **Add**.

Start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

Then select the **Patient** from the dropdown list.

Select the **Vet** from the dropdown list.

Select the **Add File** button to add a document, image, or video file of your **Patient** from your local drive to be saved with your **Discharge Summary**. Once the file has been chosen, then select **Save** to attach the file to your **Discharge Summary**.

Discharge Summary Templates are created under the **Settings** wheel on the right side of the header by selecting the **Medical Record Templates** from the dropdown list.

If there is more than one **Discharge Summary Template**, select the one you wish to use from the dropdown list. The selected template will then be displayed in the **Notes** field.

Like the **Case Summaries** for **Referring Vets**, **Template Tags** will be autofilled. This gives speed in creation of **Discharge Summaries** for **Clients**.

The **Discharge Summaries** can be edited in the **Notes** field as applicable.

Entries can be made in the **Notes** field using a stylus for Windows® PC or Android® devices, or with a stylus or an Apple Pencil® for an iPad® or iPad Pro®.

Entries can also be made using a keyboard with a touchpad or mouse. With handwriting recognition software on the computer or device, cursive writing can be converted to text.

With speech recognition software on the computer or device, speech can be converted to text.

If applicable, select the **Add Row** button under the **Notes** field to add x-ray or digital photographic images to the **Discharge Summary**. The **Select Image** button will open locations for files on your local hard drive for selection of an image.

Important Note

An unlimited number of images can be added to a Discharge Summary by selecting the Add Row button again. When the Add Row button is selected again, the Row Position and Number of Rows interface opens. The Row Position is displayed as 2 by default and the Number of Rows is displayed as 1 by default. Either of these numbers can be changed for adding multiple rows for inserting images before selecting OK.

You can select any image file on your local hard drive to drag and drop into an image field. Drop each image into each field on top of **Image may be dropped here**.

If an image is added in error, select the **Delete Image** button.

If you wish to delete a row of two images, select **Delete Row** and enter the row number.

Under each image that is added to the **Case Summary** there is a space to add notes about the image.

If you wish to print the **Discharge Summary**, select **Print Preview** at the bottom of the page. When **Print Preview** is selected, a digitally signed pdf is created to review the page breaks of the **Discharge Summary** before the file is saved. If a page break needs to be added, place your cursor in the **Discharge Summary** where you wish to add one.

Then there are two ways to insert the page break:

1. A right-mouse click function can be done by holding the stylus on the screen or else doing a right-mouse click with a mouse, and this will display the dropdown menu that includes **Insert Page Break**. Select **Insert Page Break** from the menu and this will be added where the cursor has been placed in the **Discharge Summary**.
2. Scroll up to the text editor toolbar and select **Insert Page Break**, and this will be added where the cursor has been placed in the **Discharge Summary**.

Then select **Print Preview** again and check to see if **Discharge Summary** page break is in the correct place before selecting **Save**. Additional page breaks can be added as needed, and to remove ones added in the incorrect place, edit the **Discharge Summary** and delete the **[Page Break]** entry within the text.

Select **Save** at the bottom of the page for your **Discharge Summary**, and any attached files and images to be saved to the **Patient Medical History**.

Refresh

To update the **Discharge Summary** database to the most current list, select the **Refresh** button. This provides an update if new **Discharge Summaries** have been added since you first started searching the **Discharge Summary** database.

Tiles and icons

On the **Discharge Summary** page there will be 9 **Discharge Summary** tiles displayed, by default. Across the top of each tile there will be from 3 to 7 icons displayed, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Discharge Summary** tile in order to view that medical record as a digitally signed pdf document. This document can be printed. A listing of any attachments for each **Case Summary** is also displayed and can be viewed by selecting the **Attachments** paperclip icon in the Adobe® sidebar menu.

Select the green **Edit** icon on the **Discharge Summary** tile in order to make any changes to the **Discharge Summary**. Select **Save** when all edits are complete.

Important Note

By default, AutoLock Days is set to 30 so that changes can be made for omissions or errors up to 30 days after a medical record is created. The number of days can be increased or decreased and the record can be unlocked by the Practice Director(s) under Practice Settings. If the medical record has been locked, the grey Record Locked icon will be displayed and editing is no longer permitted.

Depending upon your **Role Permissions**, you may select the amber **Lock** icon if you wish to manually lock the **Discharge Summary** file from any further entries. By selecting the amber **Lock** icon, the icon changes to the grey **Record Locked** icon.

Depending upon your **Role Permissions** and if the record is not locked, you may select the red **Delete** icon if you wish to delete the **Case Summary** file from **ADC**.

If applicable, select the blue **Images** icon to view any x-ray or digital photo images that have been added to the **Discharge Summary**. These can also be printed or exported along with the **Discharge Summary**.

If applicable, select the blue **Attachment** paper clip icon to view any files attached to the **Discharge Summary**. Select each **Attachment** icon to view each attached file.

d) Client Education

Under the **Client Charts/ Education** tab, select **Client Education** from the dropdown list to open the **Client Education** page. The **Client Education** page has 2 menu tabs: **ADC Library** and **Custom Library**.

ADC Library

Select the **ADC Library** menu tab to open a library of images available within the **ADC** application to view and annotate.

The **ADC Library** folders are displayed by default in the **Detail View**. You can select the **List View** or **Icon View** as alternatives.

Within a file in the **ADC Library** there is the option to add annotations to an image and then **Save** that annotated image to a selected **Patient's Medical History**.

Select the file you wish to annotate, then select **Annotate** on the upper right.

Start entering two or more first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

Then open the **Patient** dropdown list to select the **Patient**.

Enter a **Title** for the annotated image such as "Fractured 104".

Select the **Edit Image** button to add freehand annotations. This opens the selected image in the Microsoft Paint® program. Once the image is open, freehand annotations can be made using all available tools within the program.

Once all annotations are completed within the Microsoft Paint® program, select **Save** and **Close** on the upper left menu of this program. This will save these annotations of the image.

Select the **Save** button at the bottom of the screen to save the annotated image as an **Annotated Client Education** file.

Important Note

By default, Annotated Client Education files are selected to be viewable by Clients for their own Patient(s) when they login to your Practice Portal. For more information on your Practice Portal, please see [Practice Portal](#).

Custom Library

Select the **Custom Library** menu tab to upload a new **Custom Library** file from your local drive to share for all of your **Patients**. These files can be edited and saved to individual **Patient's Medical History**.

Custom Library files can be document, image, or video files. They can be assigned to individual **Patients** with no changes, or used as templates that can be edited for individual **Patients**.

e) Annotated Client Education

Under the **Client Charts/Education** tab select **Annotated Client Education** from the dropdown list to open the **Annotated Client Education** page. Once the **Annotated Client Education** page is open, there will be a search box and two buttons displayed: **Search** and **Refresh**.

Important Note

Annotated Client Education records are only created when a Client Education file has been annotated and saved.

By default, these files are selected to be viewable by Clients for their own Patient(s) when they login to your Practice portal. By default, these files are also selected to be viewable by Referring Vets for the Patient(s) they have referred when they login to your portal. For more information on your Practice portal, please see [Practice Portal](#).

Search

To search for a **Patient's Annotated Client Education**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches the letters, in descending alphabetical order. Select the **Client** from the dropdown list.

This will display all **Annotated Client Education** files for all **Patients** with that last name.

To display all **Annotated Client Education** records in the database in chronological order, going from most recent to oldest, leave the search box blank, then select **Search**.

To display more **Annotated Client Education** tiles per page, move the **Columns Count** slider to the right.

Refresh

To update the **Annotated Client Education** database to the most current list, select the **Refresh** button. This provides an update if new **Patient Annotated Client Education** records have been added since you first started searching the **Annotated Client Education** database.

Tiles and icons

On the **Annotated Client Education** page there will be 9 **Annotated Client Education** tiles displayed, by default. Across the top of each tile there will be 1 or 2 icons displayed, depending on your **Role Permissions**.

Select the blue eye **View** icon on the **Annotated Client Education** tile in order to view the medical record as a digitally signed pdf document. This document can be printed.

Depending on your **Role Permissions**, you can select the red Delete icon to delete the **Annotated Client Education** file from the **ADC** application.

8. Taskbar

There are up to 6 icons on the bottom **Taskbar**. These icons are displayed from left to right are **Home**, **Quick View**, **AVDC Abbreviation**, **Calendar**, and **Help**.

Home

Select the **Home** icon to display the **Home** page with current information displayed about the **ADC** app.

Select the magnify glass icon with the plus symbol as many times as required to enlarge the image on the **Home** page to fit the size of the screen of the computer or device you are using.

If the image on the **Home** page is too large for your screen, select the magnifying glass with the minus symbol as many times as required so the image fits your screen size.

Once you have set the correct size for the **Home** page image, this will be saved for the computer or device and default to this size when it is opened again.

Quick View

Select the green eye **Quick View** icon to launch a separate window with a log of the most current versions of digitally signed pdf documents in a **Patient's Medical History**. This log can be launched from any page within the **ADC** application.

If there is a **Medical Record** page open for a **Patient**, selecting the **Quick View** icon will launch the **Patient Medical History** log for this **Patient** for viewing. Individual medical records can then be opened for viewing.

Example:

A **Consultation** is open for a **Patient**, and you wish to view the **Patient's** most recent blood test results. Select the **Quick View** icon on the **Taskbar**. This will launch a separate window displaying a log of the most current versions of the medical records for this **Patient** as a digitally signed pdf document. Within this log, the blood test results can be displayed by selecting the blue eye **View** icon next to the file.

If a **Patient** has not been selected in any menu option, an interface will open to select the **Client** or the **Patient** in a dropdown list.

Any digitally signed pdf document can be selected to be opened in a pdf viewer. After viewing any pdf document, it can be closed or it can be left open if you need to refer to the document again.

AVDC Abbreviation

Select the **AVDC Abbreviation** icon to view lists of the current American Veterinary Dental College Abbreviations used in the **Dental Charts** and **Bone and Soft Tissue Charts**.

This is provided as a reference for looking up and learning **AVDC Abbreviations**, their medical and lay definitions, as well as the color changes made on the **Dental Charts** when they are selected.

For subcategories of **Abbreviations**, select the **Dental Chart** or **Bone and Soft Tissue Chart** button.

Then select the **Diagnosis** or **Procedure** tab.

By default, all of the four lists are listed alphabetically from a to z, by **Abbreviation** in the first column on the left. You can select the **Category**, **Medical Description**, or **Lay Description** to do an alphabetical sort for each.

Important Note

You can select the **Export to Excel®** icon on the upper right to download each **Abbreviation** list as an **Excel®** spreadsheet to your local hard drive for viewing, saving, or printing.

Calendar

On the **Home** page select the **Calendar** icon to open the **Calendar** page.

The Calendar defaults to the current **Day** view on opening. You can also select a **Week** or **Month** view for the **Calendar**. In the upper right there is the option of selecting a **Calendar** dropdown to jump to the **Day, Week, or Month** of your choice. Use forward and back arrows to navigate to your selected time. You can also scroll down for up to 6 months into the future.

Select **Today** on the upper right to return to displaying the view for today's date.

Select **All** from the dropdown list in the top left to view appointments for all vets or select individual veterinarians in the **Practice** to view their appointments.

Hover over any one of the scheduled appointments to highlight the appointment and to view the details in the **Notes** section for the appointment.

Double click or double tap the appointment to open the information about the **Client, Practice Veterinarian, Patient**, and appointment **Notes**, as well as the **Referring Vet** if applicable.

Important Note

A very important and practical feature of the Calendar is that once it is opened for data entry, it is running in its own window. With two windows open you can toggle back and forth between the Calendar and the ADC application. This means any other medical records can be opened for data entry or review at the same time as the Calendar.

a) Make a new appointment

1. To create an entry in the **Calendar**, select **All** from the dropdown list to make appointments for all vets or select individual veterinarians in the **Practice** to make their appointments.
2. Select the **New** button on the upper right to make a new appointment. Alternatively, double click or double tap a time slot in the **Day, Week, or Month** to create a new appointment.
3. Select the correct day and time for the appointment. You can scroll down for up to 12 months into the future.

4. Then select the **Type** of appointment from the dropdown list. The **Type** entries are color-coded when displayed in the **Calendar** for quick reference. When selecting the **Type** of appointment as a **Consultation**, **Consultation and Procedure**, **Procedure**, **Recheck**, or **Technician Appointment**, the **Client** can be entered.

To select an existing **Client**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches these letters in descending alphabetical order. Then the **Patient** and **Vet** can be selected from the dropdown lists.

The **Client** e-mail address, phone number, and alternate phone number if it has been entered, as well as the **Patient** signalment will be automatically displayed. If applicable, the **Referring Vet** with an e-mail address and phone number will also be displayed.

When selecting the **Type** of appointment as either **Phone Client** or **Phone Referring Vet**, this automatically displays the phone number and alternate phone number if it was added for the selected **Client** or the phone number for the **Referring Vet** for quick reference.

When selecting the **Type** of appointment as either **E-mail Client** or **E-mail Referring Vet**, this automatically displays the e-mail address for the selected **Client** or **Referring Vet**. By selecting the e-mail address, this will launch a new e-mail in your default e-mail program.

5. Any applicable notes for the appointment can be added in the **Notes** field.
6. Once all information has been entered, select the **Save** button.

Whatever date an appointment is made on, the **Calendar** will stay on this date for the **Day**, **Week**, or **Month** view to verify the appointment has been added. Then scroll up with the scrollbar to quickly return to today's date in the **Calendar**.

b) Move an existing appointment

To move an appointment to another time slot, select the appointment by single clicking or single tapping in the **Day**, **Week**, or **Month** view. Then drag this appointment to another time slot in the day, week, or month to the nearest 15 minutes on the hour. You can scroll down for up to 12 months into the future.

Alternatively, double click or double tap on the appointment to open the information, then select the new date and time and select **Save**.

c) Search existing appointments

To search for appointments scheduled at any time in the **Calendar**, start entering two or more of the first letters of the last name in the **Client** box. This will dynamically display all **Clients** with a last name that matches these letters in descending alphabetical order. Then select the **Client** from the dropdown list.

Once a **Client** has been selected this makes the **Search** button active. Select **Search** to show all entries for **Patients** belonging to this **Client** for the entire **Calendar**. Then select any one of the displayed appointments for any of the **Patients** belonging to this **Client** to view, edit, or delete an appointment.

d) Make other entry

Select **New** in the upper right and select the date and time, then select the desired time slot. You can scroll down for up to 6 months into the future.

Select **Other** from the dropdown list for **Type** to add an entry to the **Calendar** not related to a **Client**, **Patient**, or **Referring Vet**. All the **Practice Users** or an individual **Practice User** can be selected from the dropdown list, and a **Title** can be entered such as "Staff meeting". The **Start Time** and **Duration** can be added along with additional **Notes**, as required.

For scheduling staff meetings, or other events held on a regular basis, select **Other** from the dropdown list for **Type**, and the **Recurrence** button will appear. The **Recurrence** button may also be used to schedule holiday time or time off for any one of the users in the **Practice**. Select the **Recurrence** button, then select the **Recurrence pattern** and **Range of recurrence** from the **Recurrence** interface.

Select **Save** when all information is entered.

Help

Select one of the following from the dropdown list:

a) About ADC

Select the **About ADC** icon to be redirected to the animaldentalchart.com website to find information about the origins of the **ADC** application.

b) Check for update

Select the **Check for update** icon to verify that you are using the most current version of the application, or if an update is available for download when using a PC computer or device.

c) Trial/Subscription Info

The **Practice Director** and **Practice Manager** can select the **Trial/Subscription Info** icon to view information on the number of days left and expiration dates of their free trials or of their basic PC subscription and optional Remote Desktop Licenses subscription, as applicable. They can also start or renew their subscriptions.

d) Release Notes

Select **Release Notes** to view information on new features that have been added to each new version of **ADC**.

e) Request Support

Select **Request Support** to open the animaldentalchart.com website where you will find e-mail and phone contact information for the **ADC** support team.

f) ADC User Guide

This will open this **ADC User Guide** in pdf format.