

# RoboVet 5

## What is New in Bengal Cobalt (FP35)



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## Introduction

RoboVet Bengal Cobalt (FP35) provides enhancements to several different areas of RoboVet.

Additional functionality has been added to the List Clients report, including new filters for reporting on the Data Protection and Personal Information fields that were introduced in FP34. The report is now email enabled and the grid output has been extended to include client holding numbers.

Practices can now choose to make client first name and animal breed mandatory fields. This information is needed for electronic microchip registration, for example.

Work has also been done to improve the speed of finance functions, some of which run overnight, so will benefit practices that run an out of ours service or those that need these functions to complete quicker.

Smart Address was launched in FP28 and replaces the older PAF Product, so this release removes the old PAF settings.

Finally, work has been done in the schemes to automate certain steps on joining or leaving a scheme. This is covers assigning an animal a different account term and alert.

## Important Setup Information

Since FP25, RoboVet has required .Net 4.5. Please note that this is not supported on Windows Server 2003.

All sites that use VetLogic must have at least VetLogic 1.2.3 installed/reinstalled after being upgraded to RoboVet Bengal Cobalt (FP35). Please note that if already running FP31, 32, 33 or 34, this will have already been done. Support will check and action as needed as part of the upgrade procedure.

## Optional Setup Information

There are two new settings which are configured in the background and can be set by a member of the **Support Team**:

- Practices can now choose to make the client first name a mandatory field by adding a setting. This will also mean that the user is prompted to check existing clients with a missing first name when working with that client. Please see the section on '**Mandatory Client First Name**' for further details.
- Practices can now choose to make the animal breed a mandatory field by adding a setting. This will also mean that the user is prompted to check existing animals with a missing or invalid breed when working with that animal or associated client. Please see the section on '**Mandatory Breed**' for further details.

## RoboVet Reports – List Clients

Changes have been made to the List Clients report to now include new Data Protection and Personal Information Check filters. The report is now email enabled and the grid output has been extended to include client holding numbers. The new filters are intended to help the Rapport team create campaigns for practices who want to ask their clients to agree to their practice privacy notice and update their communication preferences via their online Pet Portal.

## List Clients - New Data Protection filters

The 'List Clients' report now includes four new filters to enable users to generate reports based on data protection information. These filters replicate those used in the new Data Protection Report developed in FP34.

The screenshot shows a window titled 'Client Filters' with the RoboVet logo on the left. A list of filters is displayed in a scrollable area, with 'Consent Status (Consent Given, Consent Not Given, Consent Revok...)' highlighted. Below the list, a preview box shows 'Displays Clients with consent status: (Consent Given, Consent Not Given, Consent Revoked)'. Navigation buttons 'Next >>' and '<< Back' are located to the right of the filter list.

These new filters are:

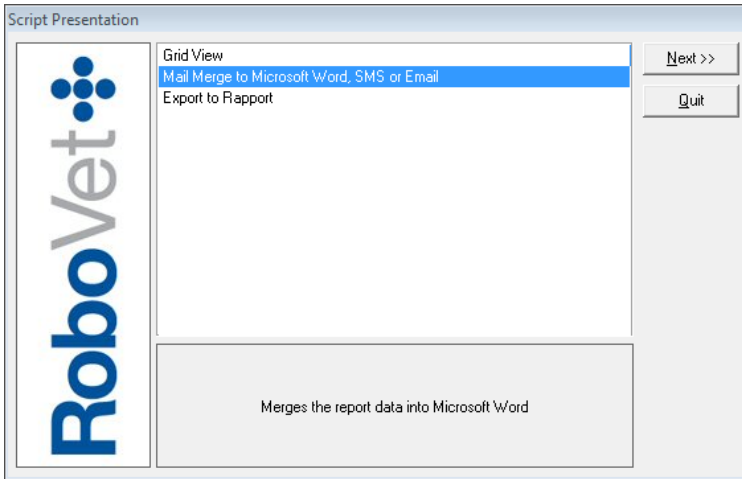
1. **Consent status** - Consent Given, Consent Not Given or Consent Revoked.
2. **Consent method** - By Email, By Phone, In Person, Online (e.g. via Rapport) or 'Pre-dates Ability To Document Consent' which is the method assigned to clients that existed in RoboVet prior to the practice upgrading to FP34. Only those consent methods assigned to clients at the practice will be available as an option for users to select in the filter list.
3. **Consent date range**
4. **Personal information last checked date range**

The grid output has been expanded to include the following:

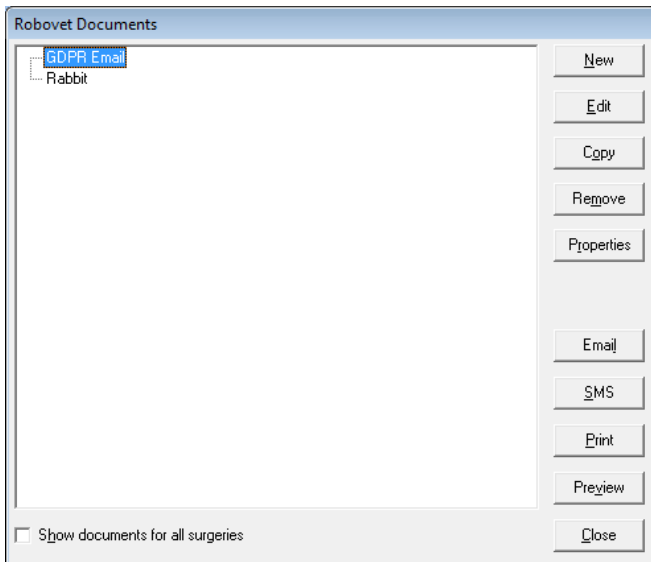
- Consent Status
- Consent Gained Method
- Consent Third Party Name (if applicable, e.g. Rapport)
- Name of the Employee who gained the consent
- Consent Date
- Personal Data Last Checked Date
- Consent Revoked Status
- Name of the Employee who revoked consent
- Consent Revoked Date
- Consent Revoked Reason

## List Clients - Now Email Enabled

The 'Email' feature available for 'List Animal Reminders', has also been added to 'List Clients', allowing practices to contact multiple clients with the same message. This can be accessed in the usual way via the Mail Merge option.

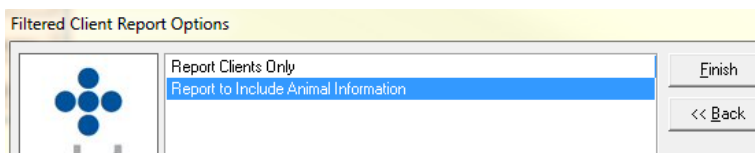


The user would then select their chosen document and the 'Email' option:



Once sent, a record is displayed in the Communications tab.

Please note that the email feature is not available if animal information is chosen to be included in the report, since one row per animal is generated, resulting in multiple emails per client.



Where a practice is using animal referral information, the report will generate a row for each of the client's animals that have referrals. This may result in multiple emails being sent per client.

### List Clients – Now Displays Client Holding Number

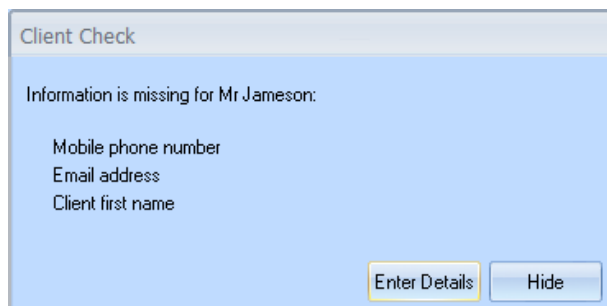
The 'List Clients' report now displays the client holding number in the grid when using the 'Filtered Client List'.

**Tip for Users:** Where a client's holding number field contains carriage returns, the full content of the field is only visible in the displayed grid once the user resizes the row height. Exporting to Microsoft Excel will strip off the carriage returns, and display the whole field.

## Mandatory Client First Name

Practices can now choose to make the client first name a mandatory field by adding a setting. (Please contact **Support** if you wish to add this setting). This means that when a client is created or edited, the user will not be able to save the client's details without entering a first name. This could be an initial.

Additionally, the new setting will also add a check when the user selects a client to work with. If a client does not have a first name, the 'Client Check' screen will prompt the user to enter a first name:

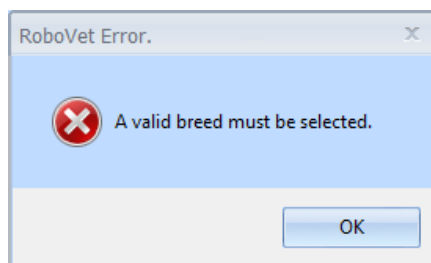


There is a difference in behaviour when checking for a first name versus checking for mobile and email. All these settings add checks when a user switches between clients, however only the 'CheckForBlankFirstName' setting also makes client first name a mandatory field. The settings for checking mobile and email do not make these mandatory fields.

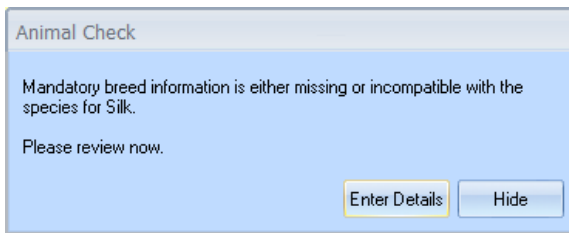
If the setting 'CheckForBlankFirstName' is not used, or is false, client first name is not mandatory and the prompt to add a first name to an existing client will not appear, i.e. existing functionality is maintained.

## Mandatory Breed

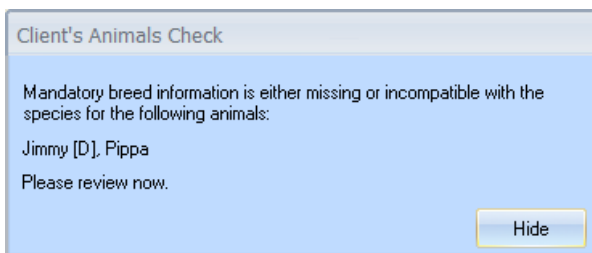
Practices can now choose to make breed a mandatory field by adding a setting. (Please contact **Support** if you wish to add this setting). This means that when an animal is created or edited, the user will not be able to save the animal's details until a valid breed for that species is selected. In addition, where an animal has a breed that is not assigned to the currently selected species (e.g. canine species with cat breed), the following warning will show, indicating that the breed must be populated with a breed applicable to the selected species.



If the user selects an animal that has a missing or invalid breed, a new 'Animal Check' window will be presented indicating that the animal's breed needs to be checked. In line with the existing 'Client Check' window, the user can either hide this window, or click the 'Enter Details' button to edit the animal's details.



When selecting a client to work with, a check is performed against all of the client's animals, including those that have been moved or are deceased. If one or more of the client's animals has a missing or invalid breed, then a new 'Client's Animals Check' window is presented to the user indicating the animals whose breed information is incorrect. Since the window can show multiple animals, the user is only able to hide the window.



## Finance Functions

Work has been done to speed up some of the finance functions, including the Account Validate script which runs as part of the Overnight Housekeeping. Some sites have found that the Overnight Housekeeping has taken so long to run it has impacted their Out of Hours service for example, or it has run on into morning surgery. This will dramatically reduce the time taken. This will also speed up the generation of the Period End Summary Reports, the Aged Debt Analysis and the Historical Balance report. Statement runs which were sometimes slow to complete will also benefit from this optimisation work.

## Smart Address – PAF Product Decommission

The old PAF product will be switched off with this release. This means that when existing PAF customers upgrade to this release, the following are all automatically removed:

- the 'PC' button next to the postcode field on the client 'change details' screen
- any instances of the postcode database from the practice server
- any instances of the setting which allowed certain terminals to access the old postcode database. This setting will no longer be in use.

All impacted customers have been written to, advising them of this change and inviting them to purchase Smart Address as an alternative.

## Schemes – Healthy Pet Club

Work has been done in this release to automate some of the actions that practice staff currently need to take when putting an animal on a scheme, or removing from a scheme, in RoboVet (e.g. changing account terms and adding animal alerts).

### Automating steps on joining or leaving a scheme

The following defaults are now available for schemes that can apply to animals (i.e. memberships that are for 'Animal' or 'Either'):

- Default account term for the animal upon joining the scheme
- Default account term for the animal upon leaving the scheme
- Default alert for the animal upon joining the scheme

The screenshot shows the 'Schemes' application window with the 'Healthy Pet Club Cat' scheme selected. The 'Details' tab is active, showing the following configuration:

- Scheme name: Healthy Pet Club Cat
- Scheme type: Time Based (e.g. Insurance/Health Plan)
- Duration: 1 Year
- Auto renewal:
- Membership: Animal
- Enrolment valid: 29/05/2008 to 29/05/2008
- Default animal account terms on enrolment: 5 HPC
- Default animal account terms on removal: 1 Small Animal
- Animal alert: Healthy Pet Club

Buttons at the bottom include 'Copy', 'Remove', 'New', and 'Close'.

Where the scheme membership 'Client' is chosen, these defaults are removed from the scheme, and the fields are disabled.

The screenshot shows the 'Schemes' application window with the 'Gold Scheme' selected. The 'Details' tab is active, showing the following configuration:

- Scheme name: Gold Scheme
- Scheme type: Time Based (e.g. Insurance/Health Plan)
- Duration: 1 Year
- Auto renewal:
- Membership: Client
- Enrolment valid: 29/05/2008 to 29/05/2008
- Default animal account terms on enrolment: (disabled)
- Default animal account terms on removal: (disabled)
- Animal alert: (disabled)

Buttons at the bottom include 'Copy', 'Remove', 'New', and 'Close'.

When an animal is enrolled on a scheme of type 'animal' or 'either', they will adopt the default account terms where their account terms are different. If the scheme has no default account term defined, the animal's existing account term is retained. The animal will also have the scheme's default animal alert added to its alerts, if it does not already have it.

This is also the case when an animal's membership is auto-renewed.

All changes to the account terms and alerts are added to the scheme action notes for the animal. These notes are not visible to the user in the case of creating a **new** membership, as the database field in question is not used for this. However, for an auto-renewed membership the user would see an action note e.g.

Action	Notes
Renew Membership	Reason: Autorenewal of scheme membership. Account term updated from '1 Small Animal' to '5 HPC'. Alert 'Healthy Pet Club' added to animal Membership: 19/03/2018 to 18/03/2019

When removing one or more animals from a scheme, the default animal account terms on removal are applied to the animal record card. Furthermore, the default alert for the scheme is removed from the animal record. An entry is also added to the scheme action notes e.g.



Action	Notes
Remove	Reason: Account term updated from '5 HPC' to '1 Small Animal'. Alert 'Healthy Pet Club' removed from animal Membership: 19/03/2018 to 18/03/2019

If there are no default animal account terms on removal, the animal's account terms remain as they are.

## Bug - Consult employee can be set to freehand text

RoboVet users were previously able to type in the consultation employee dropdown and change the employee for an existing or new consultation to any text.

Users are now no longer able to type into the consultation employee dropdown and must select an employee from the list. If an existing consultation has an incorrect employee name, this will appear in the dropdown and be selected for the select consultation only.