

Building Encounters Guide

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Accessing the Encounter Template Builder

- In your Vetspire toolbar, select “More”
- From this dropdown list, select “Admin”
- Scroll all the way down to “Encounter Types”
- Select an encounter to edit or click “New Encounter Template”

Information Section: This section includes information for updating the basic settings of your encounter

Your encounter will NOT be saved automatically. It is important to consistently press the “Save” button in the top right corner of the Encounter Template Builder or at the bottom of each section!

Encounter Template

Upload
Download
Save

Name

SUPER EXAMPLE

Default?

Yes
No

Disabled by Default?

Yes
No

Surgery?

Yes
No

Veterinarian Required?

Yes
No

Sections - Drag To Reorder

Available Variables

Intake

Name

Intake

Addable?

Yes
No

Include on Discharge Summary?

Yes
No

Section Type

Intake

Data - Drag To Reorder

Type

Field

ADD SECTION DATA

Data Item: Field (Label)

Data Item: Checklist

Data Item: Dropdown (Label)

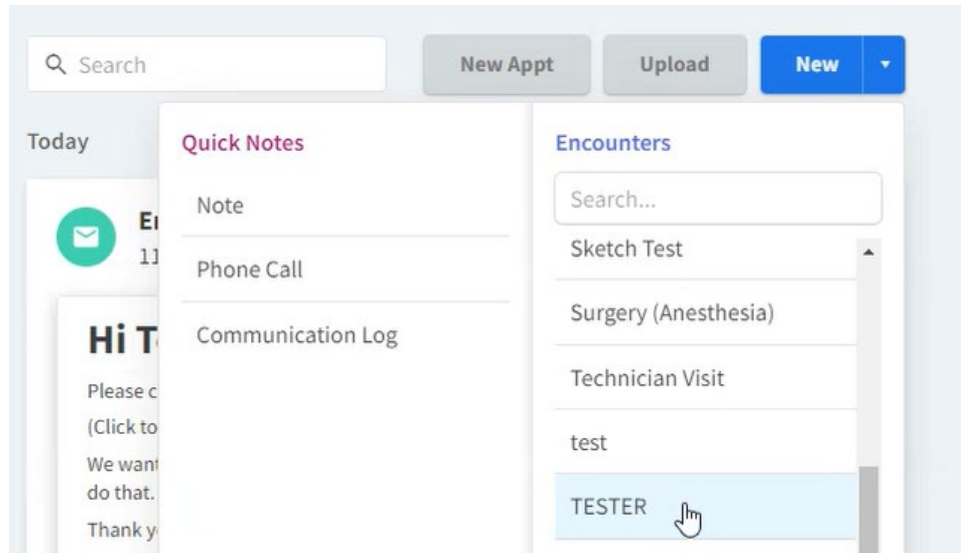
Save

The first image will show how this option appears in the Encounter Template Builder, and the second image will show how this affects the patient's chart and the use of this section.

- Name
 - How do you want this encounter type to be labeled?

Name

TESTER

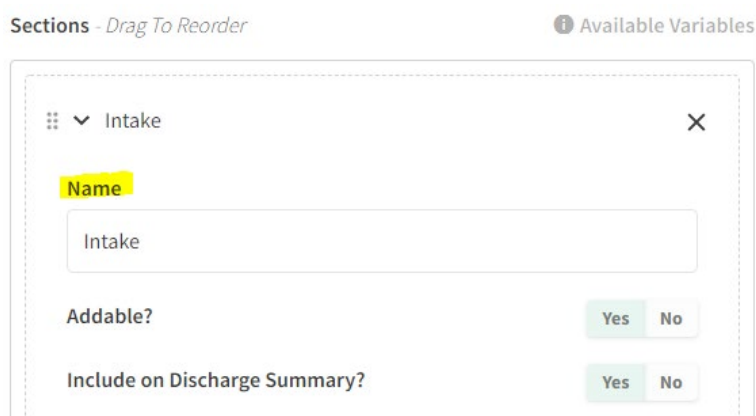


- Default?
 - Do you want this to be your default exam template?
- Disabled by Default?
 - Do you want this template to only be available at specific locations?
- Surgery?
 - Is this encounter going to be used for surgical procedures?
- Veterinarian Required?
 - Is a veterinarian required for this encounter type?

Section Types: This section will explain how each of the section types are used and demonstrate how they appear in the patient's chart

The first image will show how this option appears in the Encounter Template Builder, and the second image will show how this affects the patient's chart and the use of this section.

1. Name: How do you want this section to be labeled in the encounter?



Intake
Vitals
Subjective
Objective
Assessment
Plan
Orders
Problem List

Intake

Chief Complaint
Write note...

Do you have concerns for your pet today?
☐ Yes
☐ No

2. Addable? If this is marked as “Yes”, a button will be available at the bottom of this section that allows a note to be added to this section

Sections - Drag To Reorder

Available Variables

Intake

Name

Intake

Addable?

Yes No

Include on Discharge Summary?

Yes No

Objective

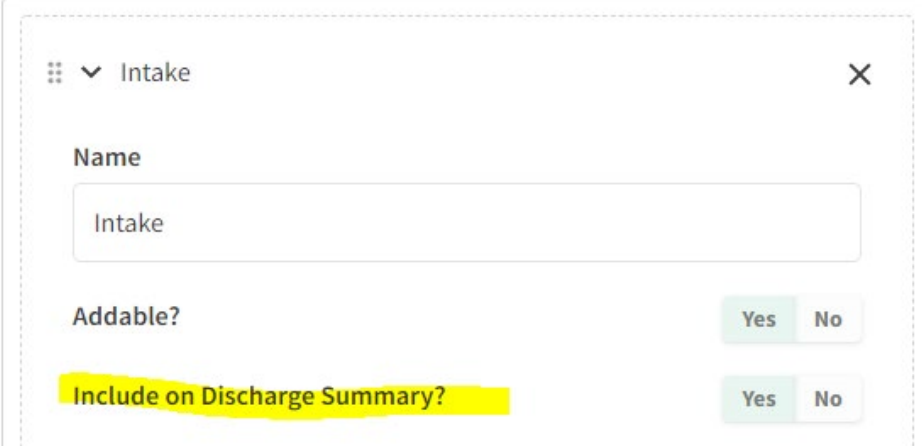
Eyes	NORMAL	ABNORMAL		Ears	NORMAL	ABNORMAL	
Oral	NORMAL	ABNORMAL		Heart	NORMAL	ABNORMAL	
Respiratory	NORMAL	ABNORMAL		Abdomen	NORMAL	ABNORMAL	
Urogenital	NORMAL	ABNORMAL		Nervous	NORMAL	ABNORMAL	
Musculoskeletal	NORMAL	ABNORMAL		Skin/Hair	NORMAL	ABNORMAL	
Lymph Nodes	NORMAL	ABNORMAL		Anal Gland	NORMAL	ABNORMAL	

+ Add Note

3. Include on Discharge Summary? Do you want this section to be included when the discharge is printed/emailed for this encounter? If you select “No” or leave this unselected, this section will only show when the full visit summary is printed/emailed.

Sections - Drag To Reorder

 Available Variables



Intake

Name

Intake

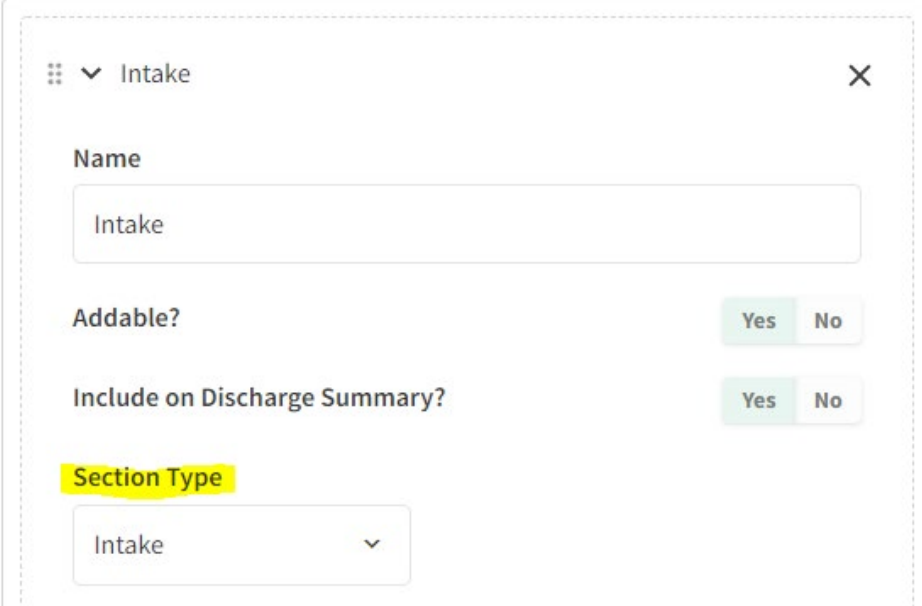
Addable? Yes No

Include on Discharge Summary? Yes No

Section Types: Select a section type based on the following question, “What purpose do I want this section to serve?”

Sections - Drag To Reorder

 Available Variables



Intake

Name

Intake

Addable? Yes No

Include on Discharge Summary? Yes No

Section Type

Intake

The designed purpose of the section type is described below with an image of how each type will appear in the patient's chart.

- Vitals
 - Input vitals into the encounter

Vitals	
	2/14/22 4:59pm
~ Weight (lbs)	0 lbs
~ Temperature (°F)	0 °F
~ Heart Rate (bpm)	0 bpm
~ Resp. Rate (bpm)	0 bpm
Attitude	attitude
~ Pain Score (1-10)	<input type="text"/> v
Mucous Membrane	mm
Capillary Refill	crt

- Orders
 - This section is not customizable, aside from the title. It will generate the option to order products and services to be invoiced. If you input a name, this will be for internal use only. This name will only show on the side of the encounter, but the section title will shown as “Orders” in medical records.

Orders
[+ Order Lab](#)

- Consents
 - This section is not customizable, aside from the title. It will generate the option to capture client consents for this visit. If you input a name, this will be for internal use only. This name will only show on the side of the encounter, but the section title will shown as “Consents” in medical records.

Consent Forms

[+ Capture New Client Consent](#)

Consent Forms

Patient Drop Off Form at 5:01 pm on 02/14/22

[+ Capture New Client Consent](#)

- Complications
 - This section is not customizable, aside from the title. It will generate the option to link a “complication” to this encounter. A complication is a reported adverse medical event. These complications must be created in advance in your “Admin” settings. If you input a name, this will

be for internal use only. This name will only show on the side of the encounter, but the section title will shown as “Complications” in medical records.

Complications + Add Complication

No complications reported...

Complications + Add Complication

Vaccine Reaction (Facial Swelling) Moderate
Reported by O approx. 45 minutes after vxns.

Vaccine Reaction (Hives) Moderate

- **Immunizations - This section currently is not functional**

- Attachments

- This section is not customizable, aside from the title. It will generate the option to upload attachments to be included in your visit summary. If you input a name, this will be for internal use only. This name will only show on the side of the encounter, but the section title will shown as “Attachments” in medical records.

Attachments Upload Attachment

Attachments 1 Upload Attachment

rDVM Records Records from EC

- Linked Encounters

- This section is not customizable, aside from the title. It will generate the option to link multiple visit summaries into one record for easy sending/invoicing (Ex: Hospitalization for 5 days, 5 linked encounters.) If you input a name, this will be for internal use only. This name will only show on the side of the encounter, but the section title will shown as “Linked Encounters” in the patient chart.

Linked Encounters 0 CREATE LINKED ENCOUNTER

Linked Encounters 1 CREATE LINKED ENCOUNTER

Surgery (Anesthesia) by

- Problems

- This section is not customizable, aside from the title. It will generate the option to input diagnosis for this visit. If you input a name, this will be for internal use only. This name

will only show on the side of the encounter, but the section title will shown as “Problems” on medical records.

Problem List

Cryptococcosis

Feb 14, 2022

+ Add Problem

- **Diagnostics – This section currently is not functional**

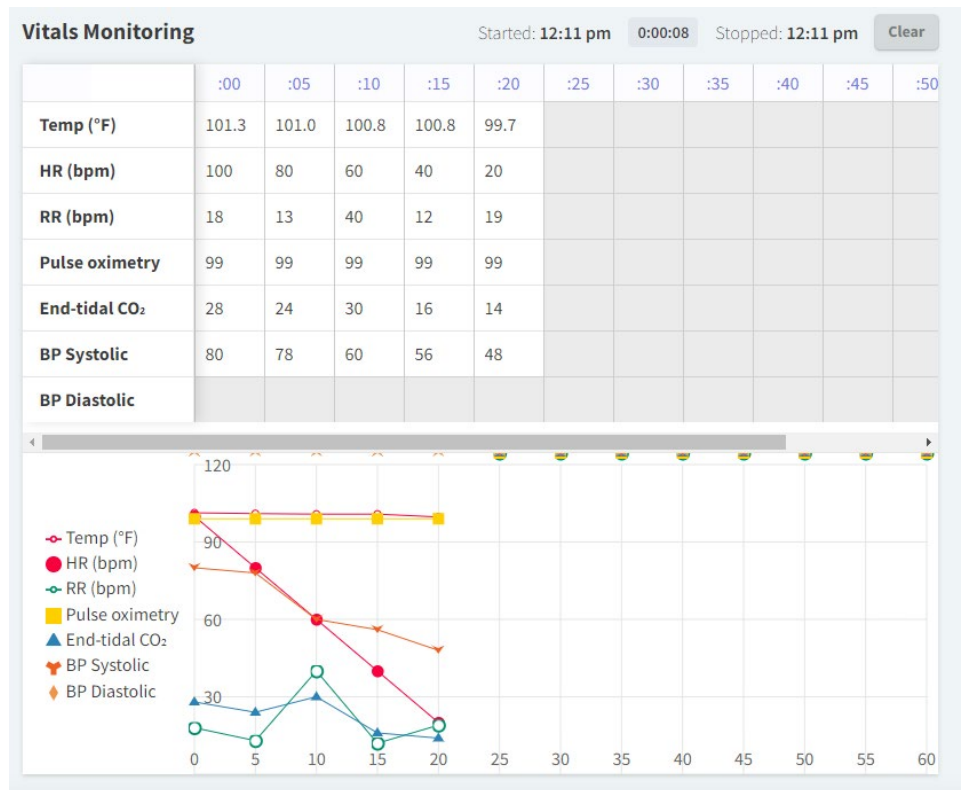
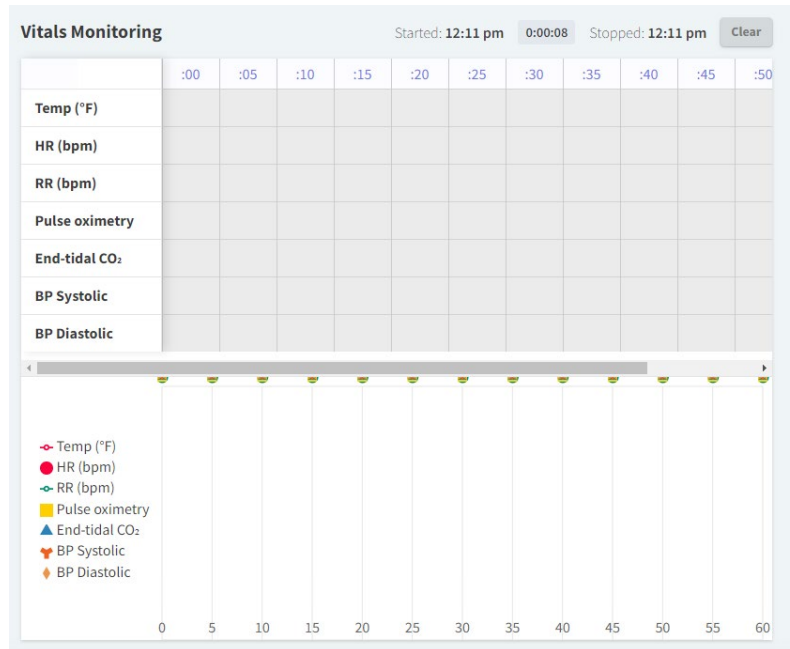
- Medications

- This section is not customizable, aside from the title. It will generate the option to input diagnosis for this visit. If you input a name, this will be for internal use only. This name will only show on the side of the encounter, but the section title will shown as “Medications” on medical records.

Current Medications									
Medications	Quantity	Refills	Provider	Date	Expires	Status	Actions		
Interceptor card	1	0		Jan 24, 2022		Active	Refill Today	No Longer Using	...
Rimadyl 25mg Tablets	50	0		Jan 24, 2022		Active	Refill Today	No Longer Using	...
Rimadyl 25mg Tablets	1	0	Dr. Test Dummy	Jan 18, 2022		Active	Refill Today	No Longer Using	...
Interceptor card	1	0	Dr. Test Dummy	Jan 18, 2022		Active	Refill Today	No Longer Using	...

- Monitoring

- Vital monitoring for a procedure or hospitalization



- Intake
 - Intake questions *This part of the encounter will be sent to the client as part of their self-check-in. Your client's responses will be recorded in Vetspire

- Follow Up
 - This section is not customizable, aside from the title. It will generate the option to schedule a follow up appointment and reminder in the chart. If you input a name, this will be for internal use only. This name will only show on the side of the encounter, but the section title will show as “Follow Up” on medical records.

- None
 - The purpose of this section does not fit any of the above section types

Building Intake/Self Check-in

If “Intake” is selected for your section type, all datasets listed in this section will be sent to client via the “Email self check-in” or “Text self check-in” buttons for each appointment. The client's responses will be populated in Vetspire for staff to view and edit.

Section Data Type - How do you want this question to be presented and utilized in the encounter template?

IMPORTANT: Below are the data types that are functional in the “Intake” section type. ***If you attempt to use any of the other available data types, they will not be visible/functional in the self check-in form sent to clients.***

- Field
- Checklist
- Dropdown

The images are presented in the below order.

1. Show how this data type appears in the Encounter Builder
2. Shows how this option will appear on the intake/check-in will appear for clients.
3. Shows how this option appears in the patient’s chart

- **Field:** This will present a question and will give staff and the clients the option to type a free response that will be populated in the patient's chart
 - Label: Input the question/desired text
 - Value: This will generate default text in the patient's chart. ***This is typically left blank. This text is for internal use only and will not be shown on the self check-in for clients***
 - Full: If this is marked as "Yes", this question will be the only question in a line.
 - Required: If this is marked as "Yes", this question will be required for clients to submit their check-in form. ***Our team is currently addressing a bug that is causing all questions on the self check-in to be required for clients to submit their check-in. We currently do not have an ETA on a fix for this, please adjust your question/text to instruct clients to input "N/A" to avoid errors***

▼ Data Item: Field (Label)

×

Label

Field (Label)

Value

Field (Value)

Full

Yes

No

Required

Yes

No

Field (Label) *

Field (Label)
Field (Value)

- **Checklist**
 - This allows you to present a question and allows clients to select multiple options from a pre-set list
 - Label: Input the question/desired text
 - ShowTimestamp: If this is marked as "Yes", when this section is completed by staff in the encounter, the date and time of completion will be recorded. ***Please ignore this**

section. This will soon be removed, as this function is not currently active when used in an intake section*

- Options: This is where you input all options you want to provide your client to answer the question presented. To create new options, click the arrow in the Options section and type in the text that you would like to appear as an option. To delete an option, click the “X” next to the option you would like to delete.
- Inline: If this is marked as “Yes”, this question will be shown in line with other questions set to be Inline. This condenses the intake section. ***This setting only pertains to the patient’s encounter. In the self check-in, all clients are shown in a list format with a full/separate line for each question.***
- Required: If this is marked as “Yes”, this question will be required for clients to submit their check-in form. ***Our team is currently addressing a bug that is causing all questions on the self check-in to be required for clients to submit their check-in. We currently do not have an ETA on a fix for this, please adjust your question/text to instruct clients to input “N/A” to avoid errors***

▼ Data Item: Checklist

×

Label

Checklist

ShowTimestamp

Yes

No

Options

Yes

No

Maybe

▼

Inline

Yes

No

Required

Yes

No

Checklist*

Yes

No

Maybe

Checklist

- ☒ Yes
- ☐ No
- ☒ Maybe

- Dropdown

- This allows you to present a question and requires clients to select *one* option from a pre-set list
- Label: Input the question/desired text
- Value: This will generate default text in the patient's chart. ***Leave this section blank. This section is not functional in the "Dropdown" data set. Our team is working on getting this option removed***
- Full: If this is marked as "Yes", this question will be the only question in a line. You do not have to make a selection for this option.
- Required: If this is marked as "Yes", this question will be required for clients to submit their check-in form. ***Our team is currently addressing a bug that is causing all questions on the self check-in to be required for clients to submit their check-in. We currently do not have an ETA on a fix for this, please adjust your question/text to instruct clients to input "N/A" to avoid errors***

⋮

▼ Data Item: Dropdown (Label)

✕

Label

Dropdown (Label)

Value

Value

Full

Yes

No

Options

Yes

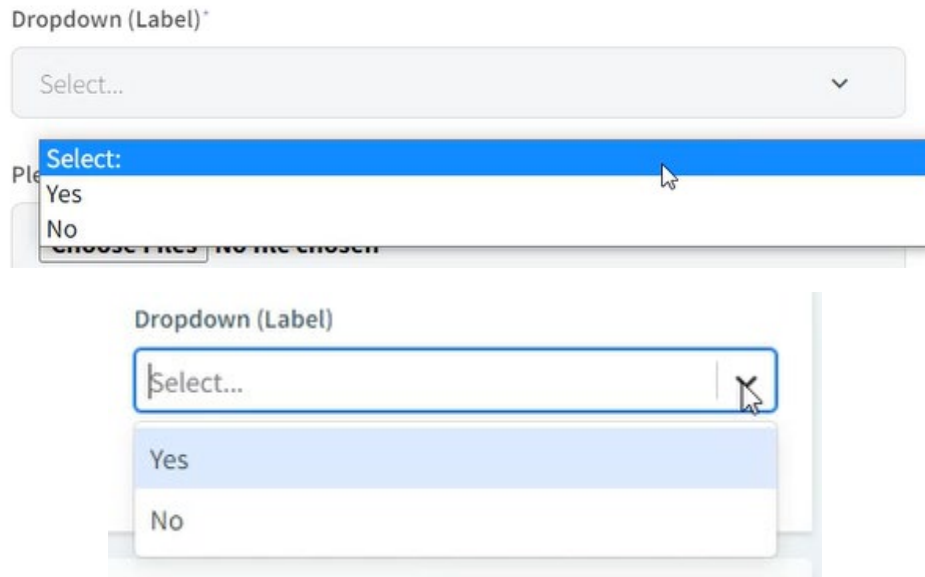
No

▼

Required

Yes

No



Building all other section types

All sections other than “Intake”, will not be sent to clients as part of their self check-in. These sections will provide a template for your exams, procedures, etc.

- Vitals
 - This section will allow you to set what vital you would like input into the patient’s chart for this visit.

The **only** data type that is functional in this section type, is “Vital”. ***If you attempt to use any of the other available data types, your encounter will not be functional.***

- field: Select what this vital will be evaluated. This will display text for internal use to guide users on what’s intended to be input into this section.
- Label: Input the desired title/label for this vital.
- Unit: Select your desired unit of measurement for this vital. If you leave this blank, your staff can type in text and there will be no unit attached. (Ex: BAR, QAR, <2sec, etc.)
- Focused: Please leave this section as-is. This option will soon be removed from the Vital data set.

Type

Vital

ADD SECTION DATA

☰ ▼ Data Item: Weight*

✕

field

weight

Label

Weight*

Unit

lbs

✕ ▼

Choose a unit or add your own.
Numerical units in the form of "5-50" will appear as a dropdown.

Focused

true

Vitals

	2/16/22 12:19pm	7/21/20 12:07pm
⤿ Weight* (lbs)	0 lbs	28 lbs

- Monitoring

- This section will allow you to customize the monitoring section in your encounter.

The **only** data type that is functional in this section type, is "Monitor". **If you attempt to use any of the other available data types, your encounter will not be functional.**

- Graph: If this is marked as "Yes", this will create a graph to visualize trends in vital signs during monitoring.
- Show total: If this is marked as "Yes" This will track the amount of time of the procedure/event.
- Time Id: This defines what procedure/event is being monitored.

Monitoring*

Name

Monitoring*

Addable?

Yes No

Include on Discharge Summary?

Yes No

Section Type

Monitoring

Graph

Yes No

Show Total

Yes No

Time Id

Surgery

Data - Drag To Reorder

Type

Monitor

ADD SECTION DATA

Data Item: Temp (°F)

Label

Temp (°F)

Inline

Inline

Focused

Focused

- Label: Select from this list of options for the type of vital you would like monitored. You will can add to multiple “Monitor” data sets to create your full monitoring chart.
- Inline: Leave this section blank. Our team is working on getting these removed.
- Focused: Leave this section blank. Our team is working on getting these removed.

Data - Drag To Reorder ✕

Type

Monitor ▼

ADD SECTION DATA

☰ ▼ Data Item: Temp (°F) ✕

Label

Temp (°F) ▼

Inline

Inline ▼

Focused

Focused ▼

☰ > Data Item: IV Fluid Rate ✕

☰ > Data Item: HR (bpm) ✕

☰ > Data Item: Pulse oximetry ✕

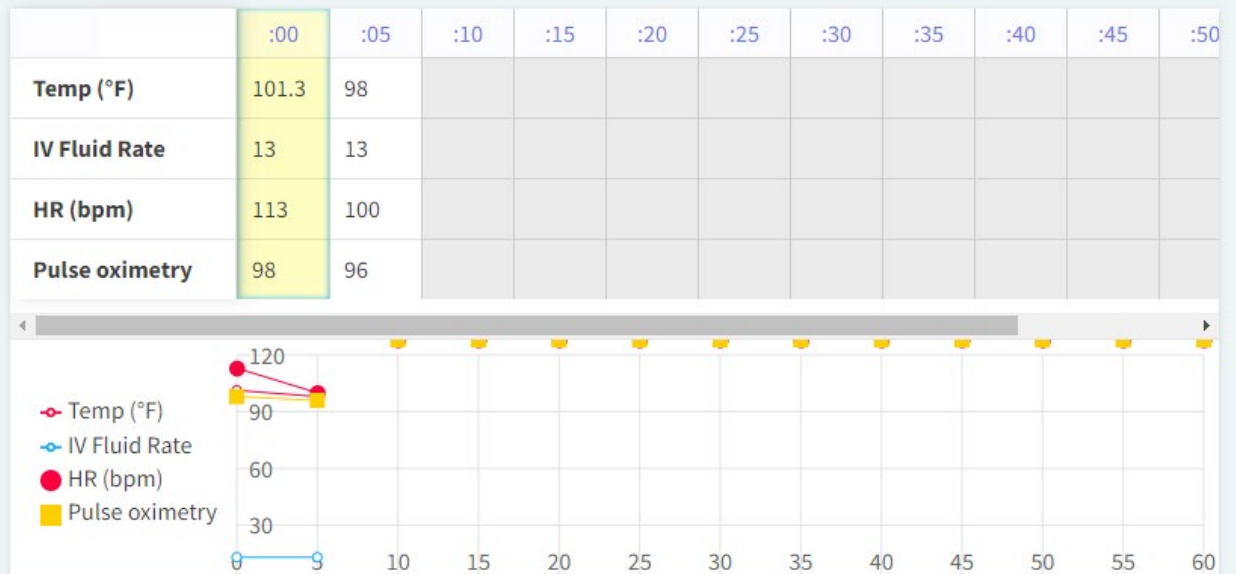
Monitoring*

Started: 5:21 pm

0:00:05

Stopped: 5:22 pm

Clear



Using additional data types: This section will show you how to utilize the remaining data types that have not already been discussed.

- Valueset
 - This will create a section to document physical exam findings.

⌵ Data Item: New Valueset

Label

New Valueset

Value

NORMAL

AbnormalDefault

ABNORMAL

NormalDefault

NORMAL

Note

Note

Full

Yes

No

Required

Yes

No

Valueset Options

Option Value

NORMAL

Option Flag

NORMAL

New Valueset

NORMAL

ABNORMAL

Record note...

- Label: Input the desired title/label for this section.
- Value: **Do not change any text in this section.**
- AbnormalDefault & NormalDefault: **Do not change any text in these sections.**
- Note: This will input a default note in this section, *regardless of if normal or abnormal is selected

New Valueset

NORMAL1

ABNORMAL4



TEST NOTE

- Full: *You do not need to select and option in this section.*
- Required: *You do not need to select and option in this section. Our team is working on getting this option updated.*
- Option Value: This will update the text that is displayed in the valueset.

New Valueset

NORMAL1

ABNORMAL4



TEST NOTE

- Option Flag: **Do not change any of the option flags.**

Full ☒ Yes ☐ No

Required ☒ Yes ☐ No

Valueset Options

Option Value

×

NORMAL1

Option Flag

NORMAL



Option Value

×

ABNORMAL4

Option Flag

ABNORMAL



Option Value

×

NOT_EXAMINED

Option Flag

NOT_EXAMINED



ADD OPTION

- Checkbox

- This allows you to present a question and requires clinic staff to select *one* option from a pre-set list.

The screenshot shows a configuration window for a data item. At the top, it says 'Data Item: Discharged instructions discussed with client?' with a close button (X) on the right. Below this, there are several sections:

- Label:** A text input field containing 'Discharged instructions di:'.
- ShowTimestamp:** Two buttons, 'Yes' (highlighted in green) and 'No'.
- Options:** A dropdown menu showing 'Yes' and 'No' as selectable options.
- Inline:** Two buttons, 'Yes' (highlighted in green) and 'No'.
- Required:** Two buttons, 'Yes' (highlighted in green) and 'No'.

- Label: Input the question/desired text
- ShowTimestamp: If this section is marked, “Yes”, when an option is selected in the patient’s chart, the user and time will be stamped in the patient’s chart.
- Inline: *You do not need to select an option in this section.*
- Required: *You do not need to select an option in this section. Our team is working on getting this option updated.*

Discharged instructions discussed with client?

☒ Yes

☐ No

By Amari Bradley on Feb 17, 2022 at 2:38pm

- Form

- This section allows you to create a form to be completed by clinic staff.
- Label: Input the question/desired text
- Full: *You do not need to select an option in this section.*
- Field Label: Input the question/desired text
- Value: **Delete the text in this section, unless you would like the same text to pre-populate in this form.**

Label

Historical Medications & Di

Full

Yes

No

Field Label

✕

Is the client interested in o

Field Value

Field Value - TEST

Field Label

✕

Is the patient currently on

Field Value

Field Value

ADD FIELD

Required

Required

Historical Medications & Diagnoses

Is the client interested in our clinic's membership?

Field Value - TEST

Is the patient currently on any medications?

Is the patient currently on any medications?

- Image
 - This section allows you to include an image in the patient's chart. *This image will show in the patient's chart with a note section, but you are not able to draw/edit the image with this function.
 - Alt: Do not input any text in this section.
 - Inline: You do not need to select an option in this section.
 - Upload Image: You will select "Choose File", and then "Upload" after attaching your desired image.

Is the patient currently on any medications?

Is the patient currently on any medications?

DENTAL Name _____ Date _____

KEY: O = Displaced Tooth
X = Missing Tooth
↙ = Caries, Injury, FX

MAXILLA

CANINE FELINE

R L R L

MANDIBLE

a _____
b _____
c _____
d _____

Gingiva: _____
Occlusion: _____
Salivation: _____
Halitosis: Y N
Periodontal Disease: _____
Other: _____

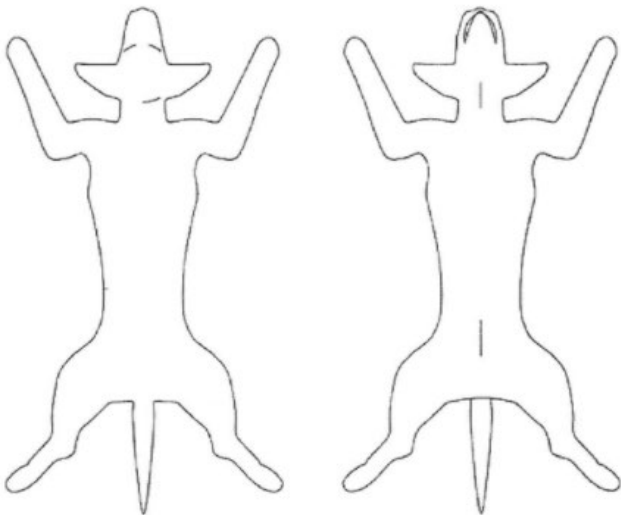
- **Sketch**

- This section allows you to include an image in the patient's chart. This image will show in the patient's chart with a note section, and you can mark/label the image.
- Value: Do not input any text in this section.
- Note: This will input a default note in this section.
- Required: You do not need to select and option in this section. Our team is working on getting this option updated.
- Upload Image: You will select "Choose File", and then "Upload" after attaching your desired image.

⋮ ▾ Data Item: Sketch

✕

Image:



Value

Value

Note

TEST - NOTE

Inline

YesNo

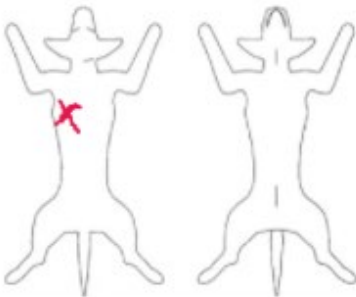
Required

YesNo

Upload Image

Choose Filecbm.png

UPLOAD



Notes
TEST - NOTE

