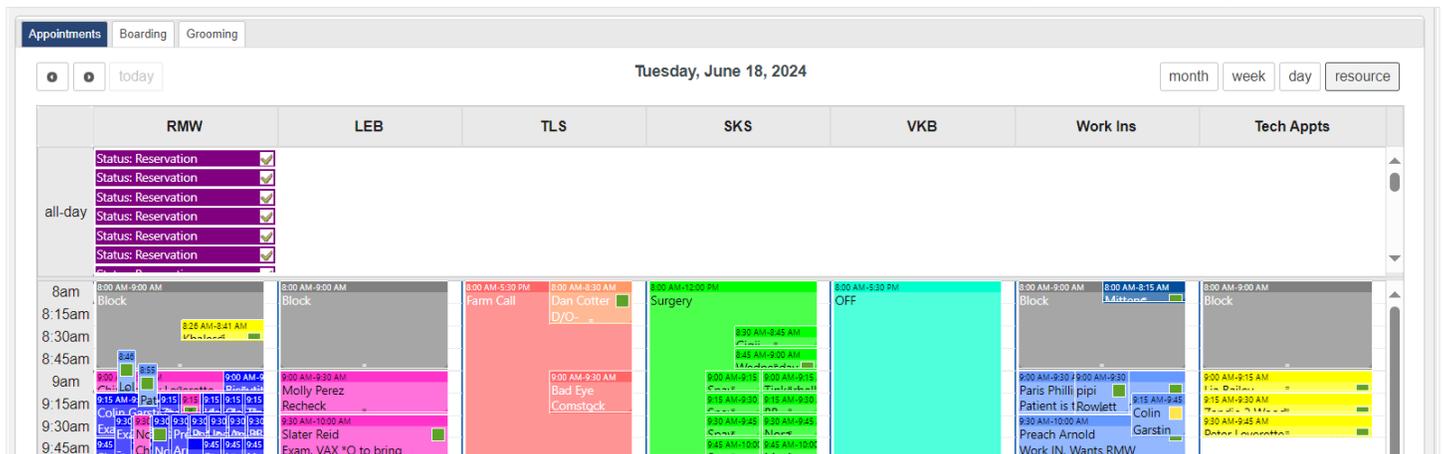


Overview

Pulse® and your previous veterinary software manage appointment creation differently. As a result, all visits that are converted will be displayed in the far left column of the Appointments tab within the Calendar. These visits will be indicated with the Appointment Types: “MIGRATION” or “MIGRATION Boarding”.

To ensure a successful Go-Live day with Pulse, we recommend [setting up a Migration Calendar Resource](#).

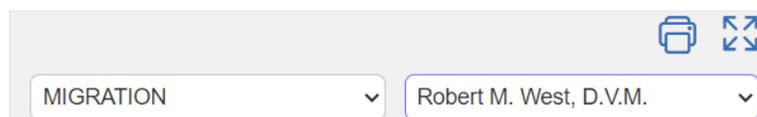
It is also recommended to manually enter the day’s appointments into Pulse. This preparation will help you stay organized during the final transition from your previous software.



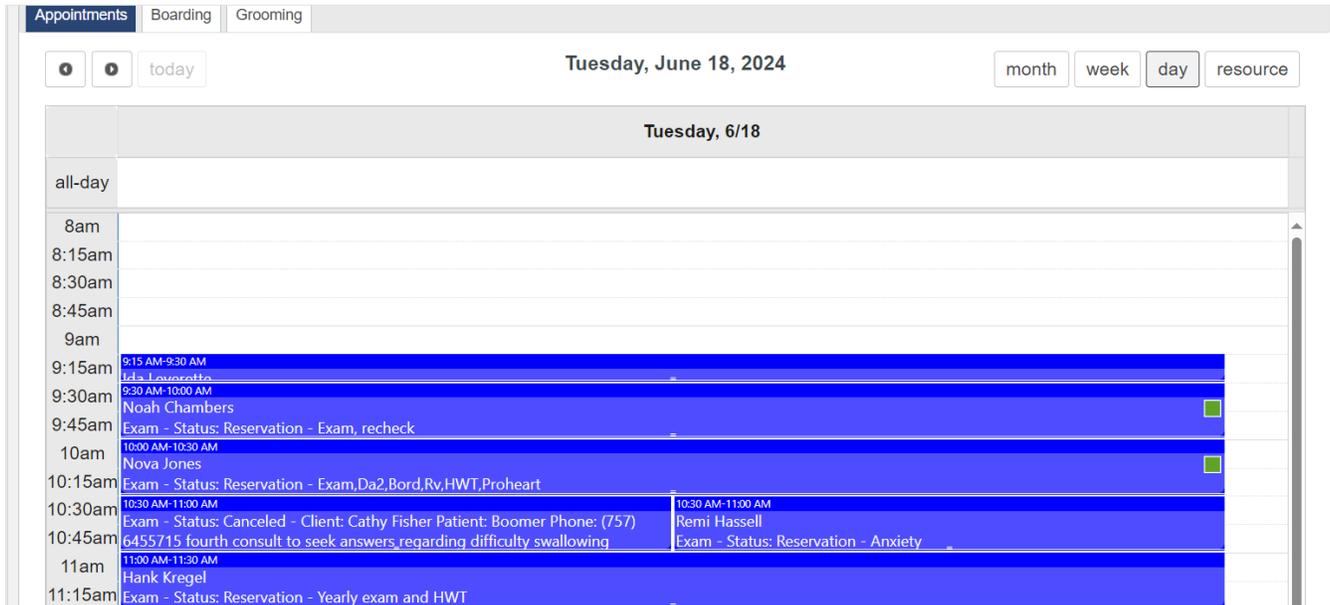
Viewing Converted Appointments

To optimize the appointments from being cluttered in one provider, you will need to manually update the Appointment Type and Resource (Provider).

- Use the following Calendar Filters to view just migrated appointments.
 - **Appointment Type:** Select Migration and Migration Boarding (if applicable):
 - **Primary Provider:** Leave as Show All to display all migrated appointments for all providers, or select a specific provider to filter further.
 - **Month/Week/Day/Resource View:** Select to change your calendar display of migrated appointments.



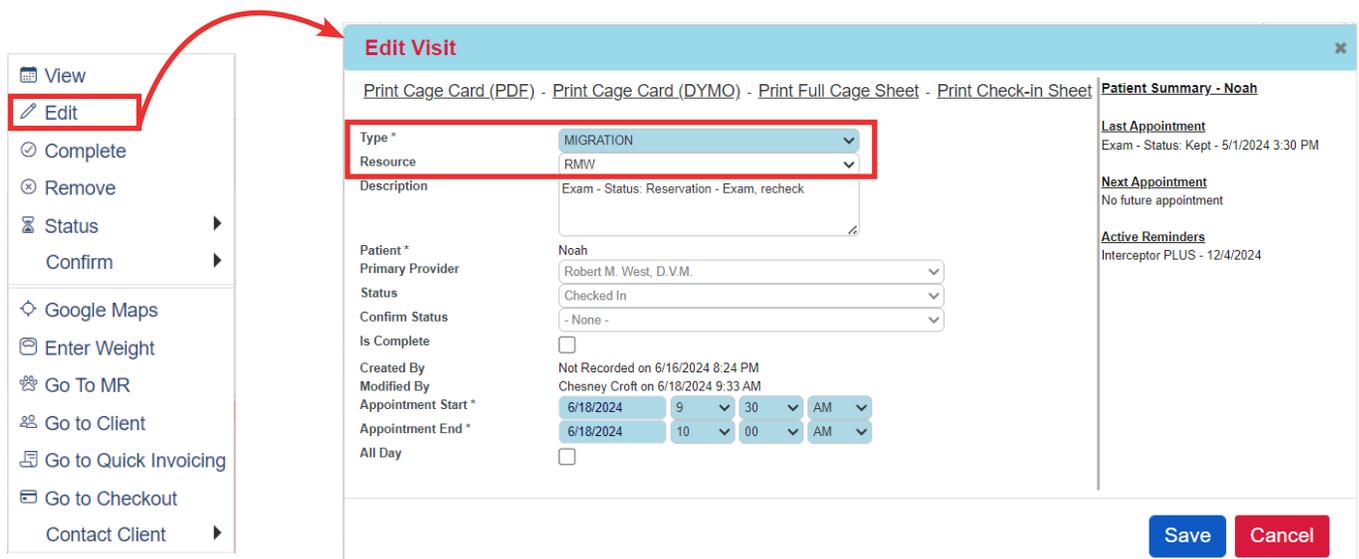
- With the previous filters, you now have a single view of MIGRATION appointments with a provider (optional) without seeing all appointments on the screen.



- This view will help when updating the visit details (Provider and Appointment Type).

Updating Converted Appointments

- Click on one appointment and select **Edit** in the top menu list.
- Edit the **Appointment Type** and **Resource**.



- Click **Save** to update the visit details.
- As the Migration appointments are updated, the column will eventually reduce to an empty column.

Below are examples of an individual appointment and daily updates:

2:00 PM-2:30 PM
 Milo Ross
 Exam, RV, DA2, Nord,

	RMW	LEB	TLS	SKS	VKB	Work Ins	Tech Appts
all-day	Duke Schwartz Status: Checked In Banjo Schwartz Status: Checked In River Testa Status: Checked						
8am	8:00 AM-9:00 AM Block	8:00 AM-8:15 AM 8:00 AM-8:15 AM	8:00 AM-9:00 AM Block	8:00 AM-5:30 PM OFF	8:00 AM-5:30 PM OFF	8:00 AM-9:00 AM Block	8:00 AM-9:00 AM Block
8:15am	7:45 AM-8:30 AM Dog Clay					8:15 AM-8:30 AM Dually	
8:30am							
8:45am							
9am	9:00 AM-9:30 AM Swiftly Kinslow	9:00 AM-9:15 AM 9:00 AM-9:15 AM	9:00 AM-9:30 AM Daisy Hobbs			9:00 AM-9:30 AM Roman Metier	9:00 AM-9:15 AM 9:00 AM-9:15 AM
9:15am	Exam - Status:	9:15 AM-9:30 AM 9:15 AM-9:30 AM	Exam - Status:			Status: 9:15 AM-9:45 AM Tucker	9:15 AM-9:30 AM 9:15 AM-9:30 AM
9:30am	9:30 AM-10:00 AM Duke Chunn	9:30 AM-9:45 AM 9:30 AM-9:45 AM	9:30 AM-10:00 AM Sadie Roberts			9:45 AM-10:15 AM Muffin Land	9:30 AM-9:45 AM 9:30 AM-9:45 AM
9:45am	Exam - Status:	9:45 AM-10:00 AM 9:45 AM-10:00 AM	Exam - Status:			walk it 10:00 AM 10:00 AM	9:45 AM-10:00 AM 9:45 AM-10:00 AM
10am	10:00 AM-10:30 AM Max Chunn	10:00 AM-10:00 AM 10:00 AM-10:00 AM	10:00 AM-10:30 AM Curly Farms			Bella 10:00 AM 10:00 AM	10:00 AM-10:00 AM 10:00 AM-10:00 AM
10:15am	Exam - Status:	10:15 AM-10:15 AM 10:15 AM-10:15 AM	Exam - Status:			Blueb	10:15 AM-10:30 AM 10:15 AM-10:30 AM

- Continue to update each converted appointment as needed.

Best Practices

Go-Live Day

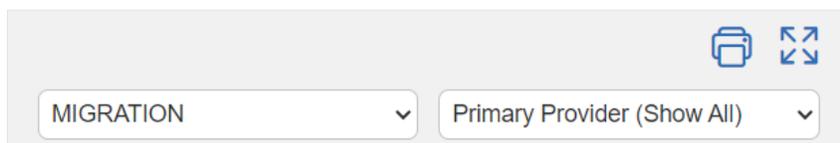
If appointments were pre-loaded, updating the launch day's appointments is not necessary. Simply leave them in the Migration Resource column.

Timing of Updates

To maximize your time, it is encouraged to update the converted appointments on a daily or weekly basis until caught up. Eventually all future appointments will be scheduled in Pulse, and there will no longer be any converted appointments to adjust.

Paper Process

If you prefer paper-based workflows and want to manage your appointments in a list view, select the **Printer icon** at the top right corner of **Appointments**. This will download the current view of appointments, based on any selected filter options.



Use the following to track your changes:

- Be aware of what needs to be updated manually.
- Notate the manual adjustments you did with the migration appointments.