OUICK START GUIDE Managing Converted Data Appointments



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.

Appointments Bearding Grooming											
0	0	today		т	uesday, June 18, 2024	month week day resource					
		RMW	LEB	TLS	SKS	VKB	Work Ins	Tech Appts			
all-	day	Status: Reservation						•			
88 8:1: 8:3: 8:4: 9: 9:1: 9:3: 9:3: 9:4:	am 5am 0am 5am am 5am 0am 5am	220 AM 220 AM Block 222 AM 221 AM Place American American 220 AM 220 AM 220 AM 200 AM	SRD AM - SRD AM Block SRD AM - SRD AM Molly Perez Recheck Slater Reid Slater Reid Exam, VAX *O to bring	190 AM 530 PM Farm Call Dan Cotter DAN D/O- 900 AM-930 AM Bad Eye Comstigak	800 AM-1200 PM Surgery 830 AM-945 AM 843 AM-920 AM 960 AM-815 V00 AM-815 Courter The Technology AM-815 Courter Technology BMA-920 PD AM-920 BH AM-920 PD AM-	ERO AMI STO PM OFF	100 AM 900 AM Block Mittower P Paris Philipipi Paris Philipipi Preach Amold Garstin Work IN, Wants RMW	DO AM-SO AM Block P00 AM-RIS AM Tig Do Table To			

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.

Appointments	Boarding	Grooming												
0 0	today					Tuesday,	June 18	8, 2024			month	week	day	resource
						т	uesday,	6/18						
all-day														
8am														
8:15am														
8:30am														
8:45am														
9am														
9:15am 9	:15 AM-9:30 AM													
9:30am	da Lovorotto :30 AM-10:00 AM													
0:45cm	Noah Chamber	'S												
10am	:xam - Status: F 0:00 AM-10:30 AM Nova Jones	Keservation -	Exam, recheck				-							
10:15am	xam - Status: I	Reservation -	Exam,Da2,Bord,	Rv,HWT,Pro	heart									
10:30am	0:30 AM-11:00 AM	cl-d cl		D-1:1 D	DL	(757)	10:30 AM	11:00 AM						
10:45am	5455715 fourth	canceled - Cli consult to se	ent: Cathy Fishe ek answers rega	rding diffig	oomer Ph culty swall	lowing	Exam -	asseir Status: Res	ervation -	Anxiety				
11am	1:00 AM-11:30 AM													
11:15am	Hank Kregel Exam - Status: I	Reservation -	Yearly exam and	нwт										

• 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.

	Edit Visit		×
View	Print Cage Card (PDF	:) - Print Cage Card (DYMO) - Print Full Cage Sheet - Print Check-in Sheet Patient Su	<u>mmary - Noah</u>
⊘ Complete	Type * Resource	MIGRATION CLast Appoi	n <u>tment</u> us: Kept - 5/1/2024 3:30 PM
⊗ Remove	Description	Exam - Status: Reservation - Exam, recheck No future ag	<u>ntment</u> opointment
Status	Patient * Primary Provider	Noah Noah Robert M. West, D.V.M.	<u>iinders</u> PLUS - 12/4/2024
♦ Google Maps	Status Confirm Status	Checked In -None -	
	Is Complete Created By	Not Recorded on 6/16/2024 8:24 PM	
密 Go To MR 器 Go to Client	Modified By Appointment Start *	Chesney Croft on 6/18/2024 9:33 AM 6/18/2024 9 30 AM	
Go to Quick Invoicing	All Day		
E Go to Checkout		I	
Contact Client			Save Cancel



- 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 рм-2:30 рм Milo Ross Exam, RV, <u>D</u>A2, Nord,

	RMW	LEB	TLS	SKS	VKB	Work Ins	Tech Appts
	Duke Schwartz 🛛 🖌 Status: Checked In						
all-day	Banjo Schwartz 🛛 🚽 Status: Checked In						
	River Testa 🛛 🖌 Status: Checked						
8am	8:00 AM-9:00 7:45 AM-8:30	8:00 AM-8:15 8:00 AM-8:15	8:00 AM-9:00 AM	8:00 AM-5:30 PM	8:00 AM-5:30 PM	8:00 AM-9:00 AM	8:00 AM-9:00 AM
8:15am	Clay_		DIOCK			8:15 AM-8:30	DIOCK
8:30am							
8:45am			_			_	_
9am	9:00 AM-9:30 AM	9:00 AM-9:15 9:00 AM-9:15	9:00 AM-9:30 AM	-		9:00 AM-9:30 AM	9:00 AM-9:15 9:00 AM-9:15
9:15am	Exam - Status:	9:15 AM-9:30 9:15 AM-9:30	Exam - Status:			Status:	9:15 AM-9:30 9:15 AM-9:30
9:30am	9:30 AM-10:00 AM	9:30 AM-9:45 9:30 AM-9:45	9:30 AM-10:00 AM			Tucker	9:30 AM-9:45 AM
9:45am	Duke Chunn 📃 –	9:45 AM-10:0 9:45 AM-10:0	Sadie Roberts			9:45 AM-10:15 AM	9:45 AM-10:00 AM
10am	10:00 AM-10:30 AM	10:00 AM-10: 10:00 AM-10	10:00 AM-10:30 AM	-	-	Muttin Land	10:00 AM-10: 10:00 AM-10
10:15am	Max Chunn 📃 📃 Exam - Status:	Nout Harmor 10:15 AM-10: 10:15 AM-10	Curly Farms Exam - Status:			Bella Blueb	Harpor HESalt= 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.