



Animal Intelligence System Administrators Guide

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Chapter 1: Introducing Animal Intelligence

Animal Intelligence (AI) is a business software system for managing the operations of veterinary specialty practices. It is designed specifically for referral, emergency, and critical care practices. You can use AI to manage the operations of up to 20 different registers if all the registers share the same inventory and accounting.

Note: To use AI in a multiple-practice office in which the practices track their inventory or accounting separately, you must license a separate copy of the AI application for each separate practice.

AI can be used in offices with one workstation or several networked workstations. When it is used on several workstations, the data entered into the system is shared by all the workstations. This means that information entered on one workstation is immediately available to all workstations.

Unique Automation Aspects of AI

Unlike other software applications, AI combines the advantages of off-the-shelf software with the advantages of designing your own system for your individual practice. As an off-the-shelf package, AI provides you with the immediate capability to manage virtually every area of your specialty practice. In addition, the unique macro features of AI allow you to incorporate your own design into the already powerful features of AI. You can turn AI into a system that automates many of your tedious, repetitious, error-prone tasks — saving you both time and money.

Installed Capabilities

Because AI is designed for specialist practices, built into the system are features needed by specialists, but not necessarily required in general veterinary practices. In AI, you can do all of the following:

- ◆ Create and maintain user records that allow the user to log in and specify the functions the user has access to.
- ◆ Create and maintain a separate record for each client, patient, veterinarian, and hospital.
- ◆ Link these records to each other so you can immediately see, for example, all the patients owned by a specific client, or all the clients referred by a particular veterinarian.
- ◆ Create and maintain medical records that track all the care received by patients.
- ◆ Generate automated referral letters that include information from the medical records.
- ◆ Schedule appointments and set up reminders.
- ◆ Generate estimates and invoices.
- ◆ Track inventory, and establish links between two or more inventory items that are normally provided in conjunction with each other.
- ◆ Print referral letters, accounting reports, operation reports, address labels, prescription labels, and more.
- ◆ Send fax transmissions directly from the computer.

You can also configure your system for your particular operation, specifying such information as applicable sales taxes, individual registers (cash drawers), accounting details, and system preferences.

More Time-Saving, Money-Saving Capabilities

Since each practice is different, a single software design cannot fully automate all the individual aspects of every practice. Office procedures vary from practice to practice. Types of care vary. Standards for invoicing, sending referral letters, and maintaining inventory vary. So, in addition to the off-the-shelf features, AI offers you the opportunity to customize the design of your system to work within the framework of your own office procedures, types of care, and standards.

These additional capabilities are provided by the macro features built into AI. In AI, a macro is a very simple, very powerful little program that performs a specific task while you are running AI. Immediately after installation, AI is already set up to use pre-defined macros to perform many of the tasks common to most practices. For example, one macro creates an invoice in a pre-defined format with pre-defined thank-you text at the end. Another macro creates each pharmacy label with the current date, expiration date, and brief instructions on dosage. Yet another macro adds a date and time stamp to each entry in a medical record.

The most significant time-saving, money-saving advantage of AI is in *your* capability to revise the existing macros and create new ones. You can change the pre-defined macros to work according to your practice, and you can create new macros to customize your system to virtually any extent you want. Essentially, you can have a personalized system that automates your work in exactly the way you want, down to almost the last detail.

To name only a few examples, you can set up AI to:

- ◆ Create a complete entry in a medical record while you simply make choices from lists you have set up previously. If you need a term that is not already in the relevant list, enter the new term instead of making a selection, add it to the list automatically for future use, and then continue creating the entry.
- ◆ Insert complex, technical words into a medical record, spelling them correctly every time, while you type only the first few letters of each word.
- ◆ Generate a complete invoice automatically as you construct the medical record, so that all procedures, medications, and peripheral supplies are included on the invoice.

AI's macro language is extremely simple to learn and use. Contact AIS for information on how your system administrator can change your AI installation into a custom software system, designed specifically for your individual practice.

AI as a Database

Database records

The information you enter into AI is stored in a **database**. A database is a set of files that store information in a way that is easy for the application to find quickly and easy for it to link to other information. Much of the data you enter into AI is stored in **records**.

For example, when you enter information about a client — such as name, address, phone number, and financial information — all that information is stored in a single record. The data about each client is stored in a separate client record. Then, when you want to view all the information about a particular client, you simply select the client’s name, and the complete record for that client is available for you to view. If you change any of the information, the new information replaces the old information in the record, and the modified record is stored in the database.

The database contains the following different types of records:

<i>Client</i>	<i>Scheduled appointment</i>	<i>Inventory item</i>
<i>Patient</i>	<i>Reminder</i>	<i>Estimate</i>
<i>Veterinarian</i>	<i>Medical record</i>	<i>Invoice</i>
<i>Hospital</i>		<i>User</i>

AI assigns a unique record number to each record of a specific type. For example, each client record has a unique number, and each patient record has a unique number. Records of different types, such as client and patient, may have the same record number, but records of the same type never have the same number.

The record numbers are solely for AI’s use. Once a number is assigned to a record, the number cannot be changed. AI uses this number whenever it looks up the record in the database. This is very important. It means that you can change any of the information in the record — even the patient’s name — and you can still retrieve the record and update it.

Fields

Each information item in a record is a separate element, called a **field**. For example, in a client record, the client's last name is stored in the Last Name field, and the first name is stored in the First Name field. There are other fields for the client's city, state, zip, phone numbers, discount level, credit card number, and all other information items about the client.

A major advantage of having each item in a different field, rather than just having all the data for a record entered into one big entry area, is that the information is much easier to organize and use. For example, when you generate address labels, you use only the information from the name and address fields of a record. So you can have AI retrieve only those fields and ignore the phone numbers and other fields of information that don't appear on address labels.

Having information stored in fields also simplifies much of your data entry. Some fields contain data that is the same in many records, for example, zip codes and phone types. For this type of field, AI provides a special type of data entry, in which you select the information from a list rather than typing it anew each time. Not only does this speed up your data entry, it also reduces the chances of data being entered incorrectly.

There are several different types of data fields, and you enter information into them in a different ways. For instructions on entering information into the various types of fields in AI, refer to "Entering Data" in Chapter 2.

AI as a Relational Database

Two of the database elements — record numbers and fields — allow AI to be a **relational database**. A relational database is one in which records can be related (linked) to each other.

A record is linked to another by its record number, and the linkage is indicated in a field that is separate from the data fields in the records, so the link information is not mixed in with the actual record data.

For example, client and patient records are separate records. But because AI can link records to each other, you can link each patient record to the appropriate client record. So, when you view the information for a particular client, you can see a list of all that client's animals.

Some of the major record relationships in AI are listed below. It is easy to see how these linkages add to the power of the AI database. Not only are you using AI to enter and maintain your data items, but you are also using it to track the relationships among data items. So in virtually any situation, all the information you need to know is right in front of you.

For example:

- ◆ Clients are linked to all their animals, the referring general practitioner, and the referring hospital.
- ◆ Patients are linked to their owners and to the staff doctor providing care.
- ◆ Estimates and invoices are linked to clients, veterinarians, or hospitals – whichever is appropriate – and to the user that generated the estimate or invoice.
- ◆ Inventory items can be linked to other inventory items.
- ◆ Staff doctors can be linked to registers.

After your system administrator sets up reports that meet the needs of your office and creates macros to automate the individual tasks of your practice, you will see how these relationships simplify your work while they ensure the accuracy and completeness of your activities.

System Administration

This section contains the information you need to configure, set up, and maintain your Animal Intelligence (AI) system so it will meet the specific requirements of your working environment.

Important: Do not attempt to set up AI for use in a multiple-practice office in which the practices track their inventory or accounting separately. The accounting and inventory information from all registers is shared within the AI system. If you need AI to manage multiple businesses with separate inventories and separate accounting, you must have a separate copy of AI installed for each one.

When you first install your AI system, follow the general setup outline below to set up AI for your practice. The order in which you perform the procedures is important because some features must be set up before others can be completed. Then, at any time, you can return to any of the procedures and make changes.

A. Set up picklists. See Chapter 2.

System picklists are used through the AI system. Certain picklists must be set up before you can complete other setup procedures. These dependencies are detailed in the following table.

Setup Procedure	Chapter	System Picklists Required for Setup
Configuring the System	3	090 - Macro Folders 099 - Tags 110 - Client Extra Field 114 - Phone Field Labels
Setting up Inventory	5	095 - Inventory Categories 118 - Vendor Names
Setting up Appointment Schedules	6	112 - Appointment Book Names 115 - Appointment Types 116 - Appointment Status (optional) 117 - Appointment Templates
Maintaining Macros	8	090 - Macro Folders 099 - Tags
Creating Reports	9	Varies from none to all, depending on the content and filtering defined for the report.

It is also recommended that you complete the initial setup of all system picklists before you begin using the Operations Center window to create records for clients, patients, veterinarians, and hospitals.

B. Configure the system. See Chapter 3.

Because the details of operation vary from one practice to another, AI provides many ways in which you can customize your system to fit smoothly into your practice. Configuration include such items as:

- ◆ Setting up sales tax rates used in your area.
- ◆ Indicating whether your practice is a multiple-business practice.
- ◆ Defining labels for data fields that are provided for you personal use.
- ◆ Defining each register (cash drawer) used in your practice.
- ◆ Providing information for automating your estimating and invoicing.
- ◆ Specifying the names and locations of macros used to generate your reports.

Before you can complete the system configuration, you must set up the picklists indicated in procedure A (above) and make sure you know the names of macros used for certain labels. Refer to “Prerequisites for Configuring the System” in Chapter 3.

C. Set up records for the system users. See Chapter 4.

Before a user can log onto the system and use its features, you must create a record for the user. Setting up user records includes identifying the user, setting up the access password, and indicating the features the user can access.

D. Set up inventory records. See Chapter 5.

Within AI, inventory refers to more than simply physical goods. Inventory items include all components that the accounting structure tracks, that is, all billable items – surgical procedures, laboratory tests, anesthetic services, as well as pharmacy and other physical supplies. Inventory items are also used for non-billable items, such as activities, in order to identify activities on estimates, invoices, and reminders.

Before you can create your inventory records, you must set up the picklists indicated in Procedure A (above).

E. Set up appointment templates and assign day schedules. See Chapter 6.

In AI, you can create as many electronic appointment books as you need — one for each doctor, service, and room for which appointments are scheduled. Before you can begin scheduling appointments, you must set up the templates that defined day schedules and assign templates to the days for which you will book appointments.

Before you can create your appointment templates, you must set up the picklists indicated in Procedure A (above).

F. Set up the Fax Server. See Chapter 7.

The Fax Server is a separate application that manages the queuing and sending of faxes created from within AI. Setting up the Fax Server involves setting up the fax printer driver on each workstation and setting up the Fax Server workstation. Once the Fax Server has been set up, the AI users can transmit faxes through the modem on the Fax Server workstation.

G. Alter macros used for labels and reports. See Chapter 8.

Optional. AI includes macros you can use for generating medical records as well as labels, invoice summaries, and other reports. You can use these macros, or you can alter the macros to customize them for your specific practice.

Before you begin working with macros, make sure you have set up the picklists indicated in procedure A (above).

H. Create custom reports. See Chapter 9.

Optional AI includes certain reports you can begin using immediately after the system is installed, such as invoices and inventory valuation reports. However, as you become familiar with the system, you may want to alter those report formats. You may also want to create your own reports that include information about clients, patients, veterinarians, hospitals, estimates, invoices, inventory, or other data you enter into AI.

Getting in Touch with AIS

AIS welcomes comments on the AI application and the documentation. Please feel free to contact AIS to express your responses to the program or to obtain information about purchasing AI or licensing additional copies.

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Chapter 2: Maintaining Picklists

Picklists provide the items for many of the drop-down lists from which you select data in AI windows, dialogs, and the macro navigator. Selecting entries from a list serves three important purposes:

- ◆ Your data entry is faster, since you are simply selecting data rather than having to compose and type the correct data for the field.
- ◆ Selecting from a predefined list reduces inaccuracies in data entry.
- ◆ The entries are standardized according to the policies of your office, so is it easy to create records, letters, and reports that are consistent and professional.

The system administrator can use the Picklist Maintenance window to modify the entries in any picklist. This chapter explains the different uses of picklists, gives instructions on how to maintain the picklists, and summarizes the picklists included in your AI system when it was initially installed.

Note: The items in some drop-down lists are not set up through picklists. For example, the **Current Doctor** list on the Patient tabsheet of the Operations Center window contains the names of users who are classified as doctors. The items in lists such as these are established by AI from the records you have created, not from picklists. Some other lists are determined in other ways, such as the names of discount levels, which are established through the Configuration Maintenance window. This chapter does not apply to any lists except the picklists.

Two Types of Picklists

All picklists are maintained in exactly the same way, and you (as system administrator) have full control over their titles and the items in each list. However, there are two different types of picklists:

- ◆ System picklists. AIS controls the functions of these lists, while you control the contents.
- ◆ Custom picklists. You control the functions and the contents of these lists.

Picklist Numbering

Each picklist is assigned a unique number from 90 to 999. When a picklist is used in some operational area of the program, the picklist number identifies the picklist to use. Identifying picklists by ID number has two significant implications:

- ◆ You can change the contents of any picklist – both system and custom picklists – and even change the title, and AI can still identify and find the list when it encounters a reference.
- ◆ You cannot change the number of a picklist that has been set up within AI, since AI uses the number to find the picklist.

The two types of picklists, system and custom, have two different ranges of numbers.

- ◆ **System picklists.** Picklists numbered from 90 to 149 are reserved for system use. Though not all those numbers are currently in use, the unused ones are reserved for AIS programmers to use for new features they may add to AI in the future.
- ◆ **Custom picklists.** Picklists numbered from 150 to 999 are for you to use in your macros.

System Picklists

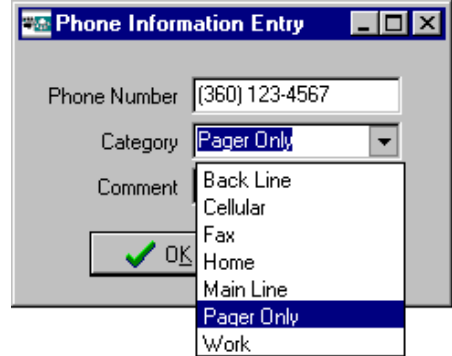
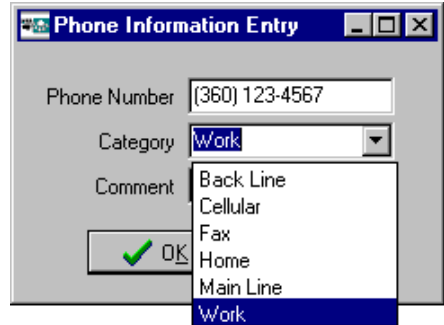
Some picklists are already in use by AI. These are called “system picklists.”

For example, the entries in the Phone Field Labels picklist (#114) are different types of phones.

When you add a new phone number to a client, veterinarian, or hospital, the Phone Information Entry dialog appears. On that dialog, the **Category** drop-down list contains the entries from the Phone Field Labels picklist.

Though the use of each system picklist is defined by AI, you (as system administrator) have complete control over the items in the list.

For example, if you added an item called “Pager Only” to the Phone Field Labels picklist, the **Category** list on the Phone Information Entry dialog would immediately include that item.



For a table showing the use of each system picklist, refer to “How System Picklists are Used” on page 29.

Custom Picklists

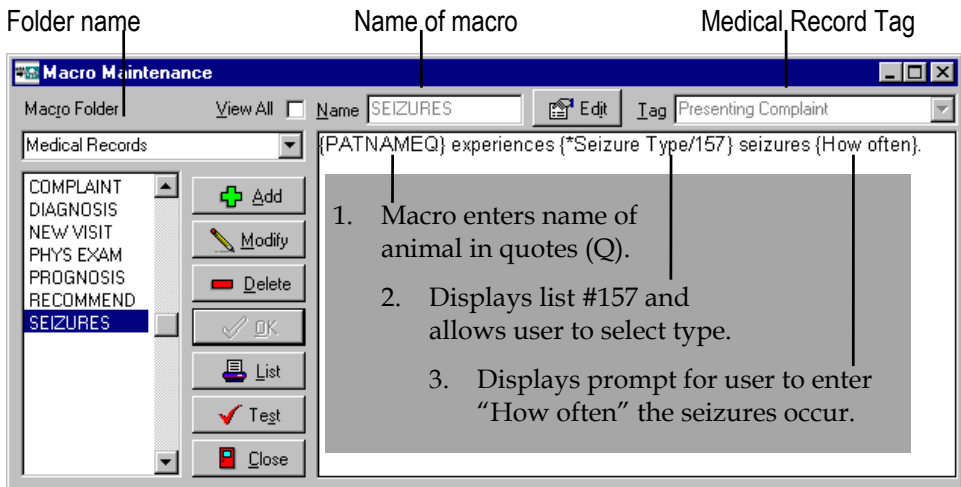
Custom picklists are used in macros. The purpose of custom picklists is to help you simplify the data entry in medical records, letters, and other AI tracking and communication facilities that use macros. For information on creating macros, refer to Chapter 8.

When you create a picklist, you define the items you want to appear in a specific drop-down list — similar to the **Category** list on the Phone Information Entry dialog. Then you reference that picklist in a macro. When a user runs the macro, and AI encounters the picklist reference, AI offers the choices you pre-defined in the list.

Custom Picklist Example

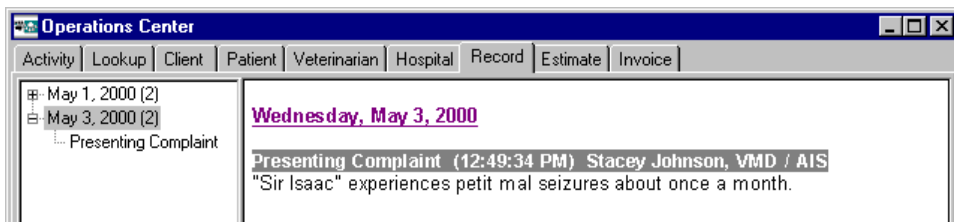
Note: To fully understand this example, you must have completed the macro training class at AIS headquarters. If you have not attended this class, contact AIS for information about the next available opening.

Picklist #157 (Seizures) is already set up in the AI installation, but it is not used in any system macros. This example creates a simple macro that references the picklist and then uses the macro to help a user enter a medical record relating to an animal with seizures. Here's how the macro is set up.



Then to complete the medical record shown below, the doctor simply:

- ◆ Selects the SEIZURE macro for a new entry,
- ◆ Selects the seizure type from a drop-down list—“petit mal” in this case,
- ◆ Types how often the seizures occur—“about once a month” in this case.

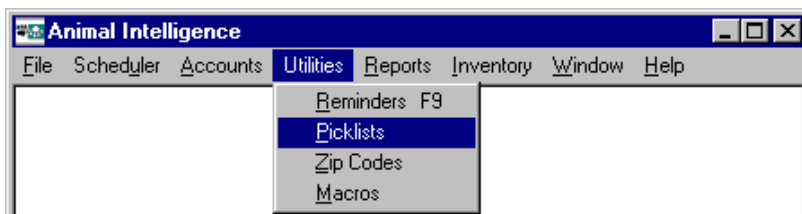


The Picklist Maintenance Window

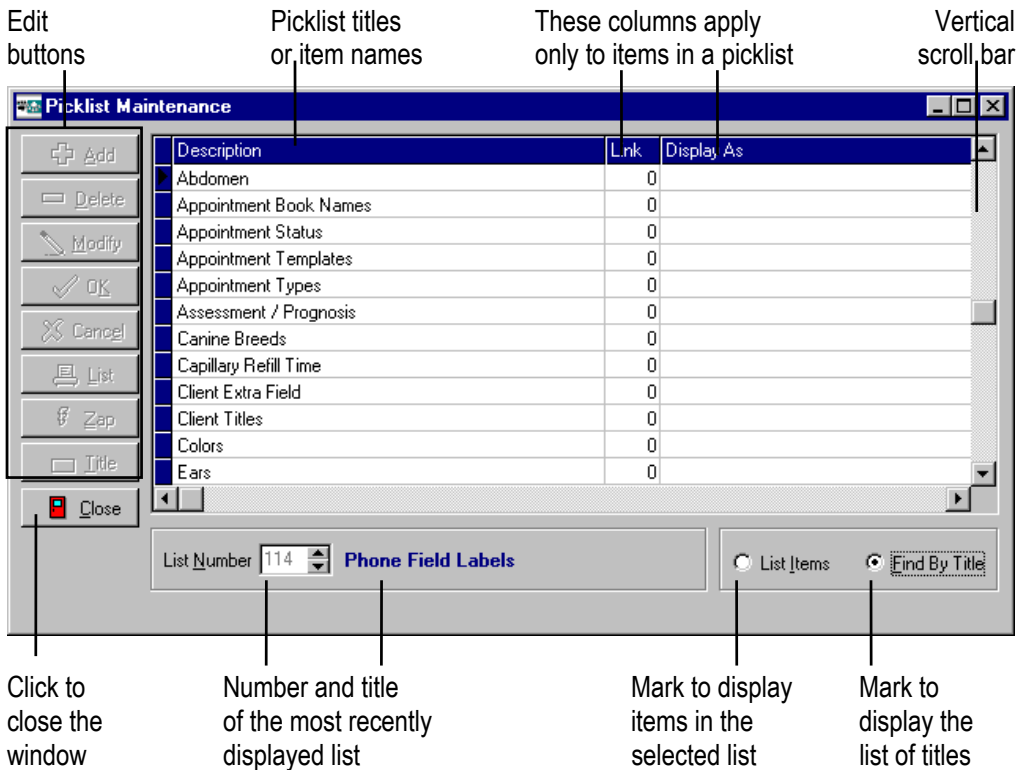
You use the functions on the Picklist Maintenance window to create new custom picklists and to modify the content of any of the picklists.

To open the Picklist Maintenance window:

1. Click **Utilities** on the menu bar to display the Utilities menu.
2. Click **Picklists** on the menu to open the window.





The Picklist Maintenance window is shown on the following page. The elements identified in the illustration are explained in the table after the illustration.



Window Element	Description
Edit buttons	When the items in a list are displayed in the window, these buttons are activated, and you can use them to edit the contents of the list. For details, refer ahead to “Editing the Picklists” on page 19.
Description	<p>When the Find By Title option button is selected, this column shows the titles of all the currently defined picklists. When you add a new picklist, the title you assign to it appears in alphabetical order in this list of titles.</p> <p>When the List Items button is selected, this column shows the items in the currently selected picklist. You can edit the title and the content of the selected list.</p>

Window Element	Description															
Link	<p><i>Not used for picklist titles.</i></p> <p>This column is used only for items in some system picklists. The value in this column indicates a link to another system function. In addition, for many picklists, the link values — rather than the descriptions — identifies the items. This means that you can change the descriptions for many picklists and the system still recognizes the item and displays the correct description.</p> <p>Do not change these values. You may need to understand the purpose of the link values in certain picklists. For details, refer ahead to the individual picklist explanation in “How Picklists are Used” on page 29.</p>															
Display As	<p><i>Not used for picklist titles.</i></p> <p>For some items in some lists, you may want the text entered into a letter or medical record to be different from the text that appears in the drop-down list. In these cases, use the Description column for the text to appear in the drop-down list, and use the Display As column for the text to appear in the record or letter.</p> <p>For example, the following illustration shows four of the items in the “Abdomen” picklist. Since all their descriptions begin with the word “kidney”, they all appear in the list together, so it is easy for the user to find the correct one. But when one of these terms appears in a medical record, it appears as the corresponding Display As text, which flows better in a record someone will be reading.</p> <table border="1" data-bbox="379 1076 1053 1230"> <thead> <tr> <th>Description</th> <th>Link</th> <th>Display As</th> </tr> </thead> <tbody> <tr> <td>kidney (enlarged left)</td> <td>0</td> <td>enlarged left kidney</td> </tr> <tr> <td>kidney (enlarged right)</td> <td>0</td> <td>enlarged right kidney</td> </tr> <tr> <td>kidney (small left)</td> <td>0</td> <td>small left kidney</td> </tr> <tr> <td>kidney (small right)</td> <td>0</td> <td>small right kidney</td> </tr> </tbody> </table> <p>For example, compare “the patient has a kidney (small right)” to “the patient has a small right kidney”.</p>	Description	Link	Display As	kidney (enlarged left)	0	enlarged left kidney	kidney (enlarged right)	0	enlarged right kidney	kidney (small left)	0	small left kidney	kidney (small right)	0	small right kidney
Description	Link	Display As														
kidney (enlarged left)	0	enlarged left kidney														
kidney (enlarged right)	0	enlarged right kidney														
kidney (small left)	0	small left kidney														
kidney (small right)	0	small right kidney														

Window Element	Description
Display As <i>(continued)</i>	You can also enter a macro variable or command in the Display As column. Then, when a user selects an item, the contents of the variable is substituted for the item or the command is run. The most common use of this function is the creation of a picklist that allows the user to select from a group of macros (such as instructions to a client).
Close button 	Click this button to close the Picklist Maintenance window. AI does not ask if you want to save your changes because changes are saved as you make them.
List Number 	<p>When Find By Title is marked, this area shows the number of the list that was most recently displayed.</p> <p>When List Items is marked, this shows the number of the list whose contents currently appear on the window. Click the up and down arrows to scroll through the picklists, or type a number into the box to display the items on the list associated with that number. Or, type a new number to add a picklist with that number.</p> <p>The title of the indicated list appears to the right of the number.</p>
List Items <input checked="" type="radio"/> List Items	<p>When this option button is marked, the window shows a list of the items in the selected list. The editing buttons are activated and you can edit the title of the selected list, change the contents of the selected list, and add a new list and its contents.</p> <p>When this option is marked, the List Number control becomes active and you can use it to select another list to view or edit.</p>
Find By Title <input checked="" type="radio"/> Find By Title	<p>When this option button is marked, the window shows a list of picklist titles. You cannot edit the lists, but you can use the vertical scroll bar to browse through the list of titles and select one to edit.</p>

Editing the Picklists

This section explains how to maintain picklists and their contents. It includes instructions for:

- ◆ Maintaining Picklist Items: viewing, adding, renaming, and deleting items.
- ◆ Printing Picklists.
- ◆ Maintaining Picklist Titles: adding, deleting, and renaming a picklist.

For a table showing where each picklist is used within the installed AI system, refer ahead to “How Picklists Are Used” on page 29.

Maintaining Picklist Items

When you change the items in a picklist, you are changing the selections available to users when they use the associated drop-down list. If you find it necessary to change the items in a picklist, make sure to let your staff know about the change, especially if they are already accustomed to using the list the way it was.

Viewing the Items in a Picklist

When the **List Items** button on the bottom right corner of the window is marked, the items in the selected picklist appear on the window, and the edit buttons become activated so you can edit the list or the items. You can select a list to view when either option button is marked.

- ◆ If the **Find by Title** option button is marked in the bottom right corner of the window, the titles appear in the table on the window. Follow these instructions to select a picklist to view:



1. Use the vertical scroll bar to the right of the list of titles to move the list up or down until you see the title of the list you want.
2. Click the title to highlight it. Then click the **List Items** option button in the bottom right corner of the window to mark it.

Or, double click the title of the picklist to view.

- ◆ If the **List Items** button is marked, the **List Number** field shows the number and name of the selected picklist. You can change the number in the field to display the list with that number. Select a picklist to view in either of the following ways:



- ◆ If you know the number of the list you want, click in the **List Number** field and press the [Delete] key on the keyboard to delete the number there, then type the number of the list. Its items appear in the window. Or, click and drag the mouse to highlight the number, and type the new number over it.
- ◆ If you do not know the number of the list you want, click the up arrow beside the list number to move to a higher number, or click the down arrow to move to a lower number. As the number changes, the appropriate list items appear in the window. If the number does not have a list defined for it, the table on the window is blank.

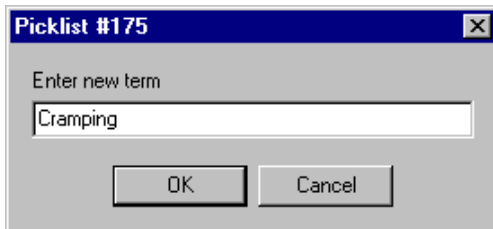
Adding Items to a Picklist



When you add new items to a picklist, they are immediately available on the associated drop-down list.

To add items to a picklist:

1. Use the instructions in “Viewing the Items in a Picklist” to display the items of the picklist on the window.
2. Click the **Add** button to open a dialog in which you enter the name of the item. Notice that the number of the selected picklist appears in the title bar of the dialog.



3. Type a name of up to 50 characters for the item and click **OK**, or press the [Enter] key on the keyboard, to add it to the list.
4. The item is added to the list, and the same dialog reappears. Repeat step 3 for each item you want to add to the list.
5. When you have added all the items you want, close the dialog. You can do this by clicking the **Cancel** button, or by leaving the entry field blank and clicking **OK** or pressing the [Enter] key on the keyboard.
6. If you want the data entry text to be different from the description, use the instructions for “Editing an Item on a Picklist” to enter text in the **Display As** column.

Note: Do not change the link values on any picklists, unless instructed to do so by customer support, or unless you are fully aware of the operational implications.

Note: Any user with the right to add to a picklist can add a term while running the macro. Instructions are included in the *Animal Intelligence Users Guide*.

Deleting an Item from a Picklist



When you delete an item from a picklist, it is immediately removed from the associated drop-down list.

Important: On system picklists, do not delete items with a value in the link column. Deleting such items could cause your AI system to malfunction. AIS also highly recommends that you delete items from a system picklist only if you have a full understanding of the implications.

To delete an item from a picklist:

1. Use the instructions in “Viewing the Items in a Picklist” to display the items of the picklist on the window.
2. Highlight the item you want to delete.
3. Click the **Delete** button.

AI does not ask you to confirm, so if you delete an item by mistake, use the **Add** button to add it back into the list.

Editing an Item on a Picklist



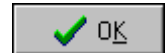
When you modify the text of an item in a picklist, the new text is immediately available in the associated drop-down list.

To modify an item on a picklist:

1. Use the instructions in “Viewing the Items in a Picklist” to display the items of the picklist on the window.
2. Highlight the item you want to rename.
3. Click the **Modify** button to place the window in modify mode. When the window is modify mode, only the **OK** and **Cancel** buttons are active.
4. If you want to change the text that appears on the drop-down list, click the cell in **Description** column, and type the new text for the list.
5. If you want the data entry text to be different from the description, click the cell in the **Display As** column and type the data entry text.

Note: Do not change the link values on any picklists, unless instructed to do so by customer support, or unless you are fully aware of the operational implications.

6. Click **OK** to save the change and take the window out of modify mode.



Or, click **Cancel** to cancel the change and take the window out of modify mode.

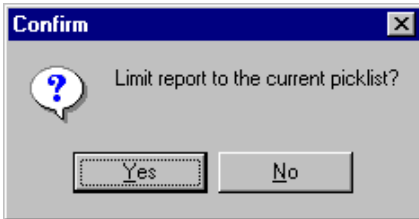


Printing Picklists



To print a listing of either the selected picklist or all the picklists.

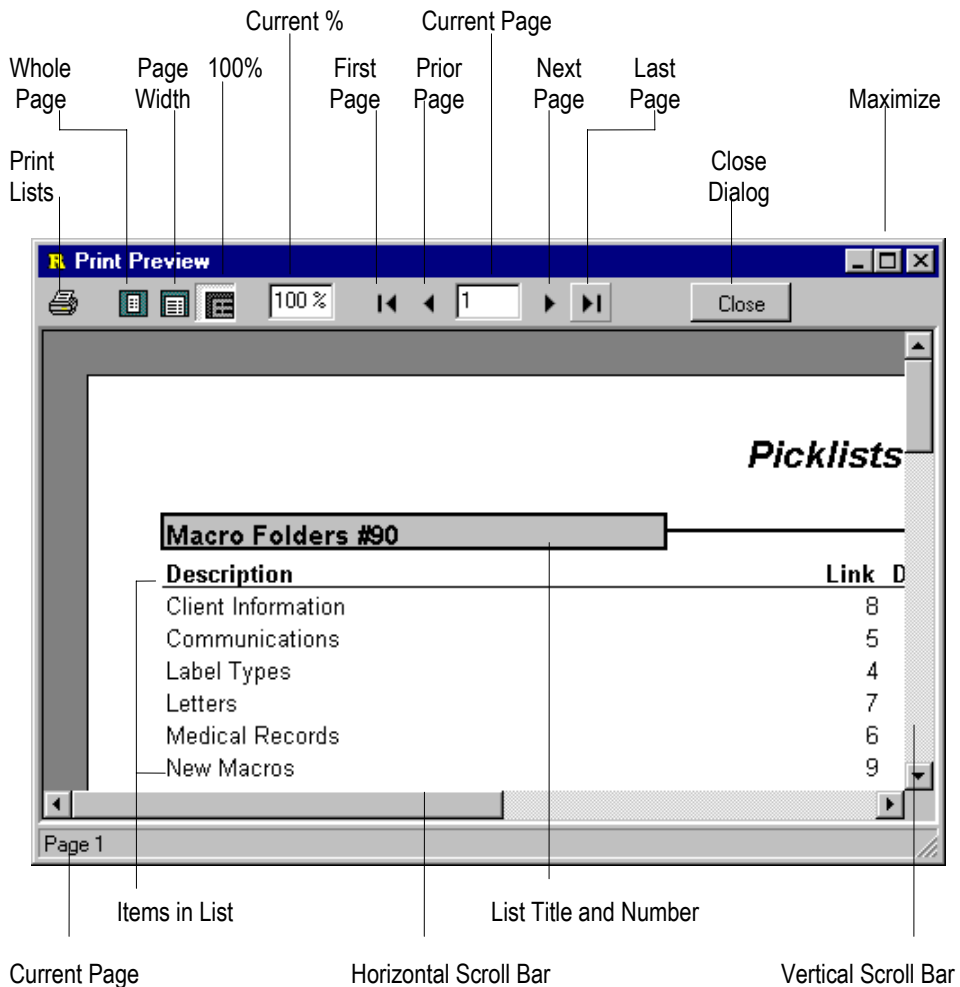
1. Use the instructions in “Viewing the Items in a Picklist” to display the items of the picklist you want to print. Or, if you want to print all lists, display the items in any picklist.
2. Click the **List** button. The following dialog appears.




3. Click **Yes** to print only the currently displayed list.
Or, click **No** to print all the lists, in numeric order.

In either case, a Print Preview dialog appears. The listing shows the title and number of each list, followed by the items in the list, along with their links and descriptions. The picklists are printed in numeric order. You can use the buttons above the page preview to:

- ◆ Print the listings on your printer.
- ◆ Control the zoom level (size) of the preview on the window.
- ◆ Display a different page.
- ◆ Close the dialog.



If the page is too large to fit in the width of the dialog, a horizontal scroll bar appears, allowing you to move the view from side to side. If the page is too large to fit in the height of the dialog, a vertical scroll bar allows you to move the view up or down.

Note that you can maximize the dialog () to see more of the page when the zoom level is high.

Maintaining Picklist Titles

Adding a New Custom Picklist



You add a new custom picklist by assigning a title to an unused picklist number, and then adding items to the list.

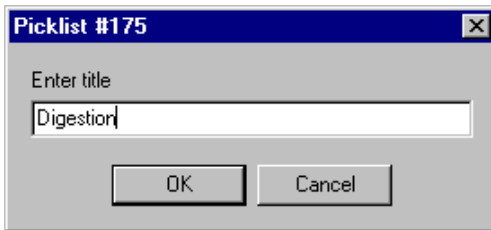
Important: Make sure you use a picklist number of 150 or higher. Numbers of 149 and lower are reserved for use by AIS.

To add a new picklist:

1. Make sure the **List Items** button is marked.
2. If you know the unused number you want to assign to the new list, click in the **List Number** box, delete the number that is there, and type the number you want to use — from 150 to 999.

If you do not know the number to assign, click the up or down arrow beside the **List Number** until a blank list appears in the window. The title area beside the list number should be blank as well.

3. Click the **Title** button on the left side of the window. The following dialog opens.



4. Type a title that summarizes the items you intend to include on the list. Since the names of picklists appear in alphabetical order in the list, you can assign a title that determines the position of the title on the list.
5. Click **OK**. Notice that the title you typed now appears beside the list number.
6. Set up the contents of the list. Refer back to the instructions for “Adding Items to a Picklist” on page 20.

Deleting a Custom Picklist

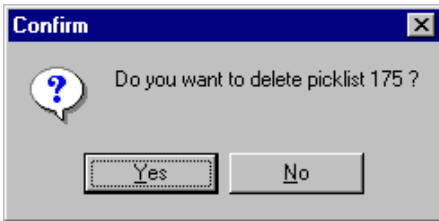


Use these instructions to delete a picklist only when you have added it by mistake or you are positive it is no longer needed. When you delete a picklist, all the items are deleted from the list, but the title remains. It is recommended that you change the title to “Not Used” so it will be clear that it is available for a new use.

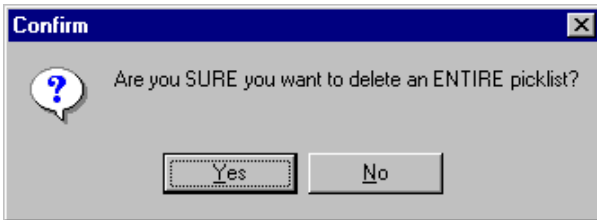
Important: Do not delete system picklists. Existing picklists with numbers from 90 to 149 are in use in the AI system. Deleting these could cause your system to malfunction.

To delete a picklist:

1. Use the instructions in “Viewing the Items in a Picklist” to display the items of the picklist you want to delete.
2. Click the **Zap** button. AI asks you to confirm.



3. Click **Yes** only if you do want to delete the list. AI asks you to confirm again. Deleting a used picklist can cause a serious data entry problem.



4. Click **Yes** only if you do want to delete the list.

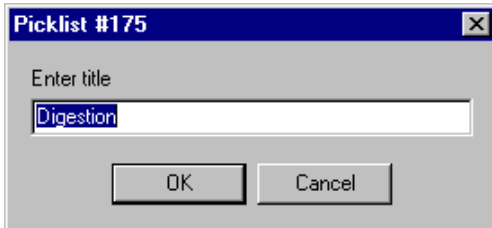
Renaming a Picklist



You can change the title of any picklist without altering the operation of AI. The titles appear only on this window, so you can define whatever title is most meaningful to you.

To rename a picklist:

1. Use the instructions in “Viewing the Items in a Picklist” to display the items of the picklist you want to rename.
2. Click the **Title** button to open the following dialog.



3. Type the new title for the picklist.
4. Click **OK**.

The new name appears in the list when **Find by Title** is marked.

Picklists by Title

The following table lists the original titles of the picklists installed with AI. Beside each title is the picklist number. Picklists are in order by title. System picklists have numbers of 149 and lower.

Picklist Title	Num	Picklist Title	Num
Abdomen	164	Musculoskeletal	165
Appointment Book Names	112	Neurological	155
Appointment Status	116	Nose	161
Appointment Templates	117	Oral Cavity	162
Appointment Types	115	Other Breeds	103
Assessment / Prognosis	154	Phone Field Labels	114
Canine Breeds	101	Pulse Quality	174
Capillary Refill Time	169	Rectal	167
Client Extra Field	110	Seizures	157
Client Titles	113	Sex	109
Colors	104	Skin	166
Ears	160	Species	108
Eyes	158	Status	105
Feline Breeds	102	Stools	153
Gender	106	Tags	99
Genitals	172	Urinary	156
Heart / Lungs	168	Vendor Names	118
Inventory Categories	95	Vomitus	152
Lymph Nodes	173	Which Ear	163
Macro Folders	90	Which Eye	159
Mucous Membranes	170		

How Picklists Are Used

This section includes information about installed system picklists and custom picklists. It also contains a form for you to use to track the picklists you create.

System Picklists

The following subsections explain the system picklists installed with your AI system (from number 90 to 149). You cannot change the use of these picklists. So, if you change the items in a list, make sure the new items are appropriate to the current use of the list.

Important: Do not change the link values of any of the picklist items, unless instructed to do so by AIS technical support personnel. Changing the link values could cause your system to operate incorrectly.

Macro Folders, #90

Where It is Used The items in this picklist appear in the **Macro Folder** drop-down list on the Macro Maintenance window, and in the **System Macro Folders** lists on the **Printing** tabsheet of the Configuration window.

Link Values Link values identify each folder uniquely, and the system uses the link value to relate the folder to each of its macros. This means that you can change the descriptions without affecting the system's operation, but **do not change the link values**. If you change the link value of a folder, you will no longer have access to the macros in the folder.

For example, if you change the link value of "Client Information" from "8" to "12", "Client Information" will still appear on the list of macro folders on the Macro Maintenance window. But the macros associated with it will not appear on the macro list, because they are linked to the macro folder 8 and the Client Information folder is now 12. You can access those macros only through a macro folder whose number is 8.

Display As Not currently used.

Other Remarks You may add new items, and change the descriptions of existing items. When you add a new folder to the list the system automatically assigns the link value. Do not change this automatic link value unless you deleted an item by mistake and are adding it back. For information that could help you decide on the macro folder names for your system, refer to “Prerequisites for Creating Macros” in Chapter 8.

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
Client Information	8	
Communications	5	
Label Types	4	
Letters	7	
Medical Records	6	
New Macros	9	
Pharmacy Label Instructions	3	
Report Formats	1	

Inventory Categories, #95

Where It is Used The items in this picklist appear in the **Category** list on the Inventory Maintenance window. In addition to the items on this picklist, the **Category** list includes these items: Credits, Debits, Log Entry, and Payments.

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

Link Values Link values identify each category uniquely, and the system uses the link value to relate the category to each of the items in the category. This means that you can change the descriptions without affecting the system’s operation, but **do not change the link values**. If you change the link value of a category, the inventory items will still appear on the Inventory Maintenance window, but the category field will be blank.

The link values may also be used in filters for reports you define on the Report Generator window.

When you create macros, you can use a category's link value in macro variables to tell AI to display the list of inventory items linked to that category. For information on creating macros, refer to Chapter 8.

Display As Not currently used.

Other Remarks You may add new items, and change the descriptions of existing items. When you add a new category to the list the system automatically assigns the link value. Do not change this automatic link value unless you deleted an item by mistake and are adding it back.

The following link values are associated with system-defined categories of items used for accounting. These categories do not appear on the picklist, and you cannot change their link numbers or use these link numbers for other categories.

- 101 Payments
- 102 Credits – decrease to client's balance due.
- 103 Debits – increase to client's balance due.
- 104 Log Entry

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
Anesthesia	3	
Laboratory	2	
Pharmacy	7	
Procedures	6	
Professional Services	1	
Radiology	5	
Surgery	4	

Tags, #99

Where It is Used The items in this picklist appear as the tags in medical records, in the **Tag** drop-down list on the Macro Maintenance window, and in the **Medical Record Tags** drop-down lists on the **Printing** tabsheet of the Configuration window.

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

Link Values Link values identify each tag uniquely, and the system uses the link value to relate the tag to macros and medical records associated with it. This means that you can change the descriptions without affecting the system's operation, but **do not change the link values**.

Each macro is associated with a tag. When you run a macro to create a medical record, the tag associated with the macro is included in the medical record. If you change the link value of a tag, the medical record will no longer show the tag description; it will show only the tag number and an indication that the description is unknown. In addition, any new macros you create and associate with the tag will be associated with the new link number. For information that could help you decide on the tag names for your system, refer to "Prerequisites for Creating Macros" in Chapter 8.

Display As Not currently used.

Other Remarks You may add new items, and change the descriptions of existing items. When you add a new tag to the list the system automatically assigns the link value. Do not change this automatic link value unless you deleted an item by mistake and are adding it back.

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
Assessment	5	
Client Information	14	
Diagnosis	10	
History	3	
Images	19	
Invoice Summary	18	
Laboratory	8	
Master Macro	17	
Medications	12	
Physical Examination	4	
Plan	6	

Description	Link	Display As
Presenting Complaint	2	
Procedures	7	
Prognosis	9	
Recommendations	13	
Reports	1	
Telephone Communication	15	
Treatment	11	
Written Communication	16	

Canine Breeds, #101

Where It is Used The items in this picklist appear in the **Breed** list on the **Patient** tabsheet of the Operation Center window. This list appears when “canine” is selected for the species. (See Species picklist # 108.)

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

Link Values Not currently used.

Display As Not currently used.

Other Remarks You may add new items, and change the descriptions of existing items.

Initial Picklist The initial picklist installed with AI is not included in this document.

Feline Breeds, #102

Where It is Used The items in this picklist appear in the **Breed** list on the **Patient** tabsheet of the Operation Center window. This list appears when “feline” is selected for the species. (See Species picklist # 108.)

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

- Link Values** Not currently used.
- Display As** Not currently used.
- Other Remarks** You may add new items, and change the descriptions of existing items.
- Initial Picklist** The initial picklist installed with AI is not included in this document.

Other Breeds, #103

Where It is Used The items in this picklist appear in the **Breed** list on the **Patient** tabsheet of the Operation Center window. This list appears when a species other than feline or canine is selected. (See Species picklist # 108.)

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

- Link Values** Not currently used.
- Display As** Not currently used.
- Other Remarks** You may add new items, and change the descriptions of existing items.
- Initial Picklist** The initial picklist installed with AI is not included in this document.

Colors, #104

Where It is Used The items in this picklist appear in the **Color** list on the **Patient** tabsheet of the Operation Center window.

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

- Link Values** Not currently used.
- Display As** Not currently used.

Other Remarks You may add new items, and change the descriptions of existing items.

Initial Picklist The initial picklist installed with AI is not included in this document.

Status, #105

Where It is Used The items in this picklist appear in the **Status** lists on the **Client**, **Veterinarian**, and **Hospital** tabsheets of the Operation Center window.

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

Link Values Not currently used.

Display As Not currently used.

Other Remarks You may add new items, and change the descriptions of existing items. Use these items for marking clients with standard attributes, such as “Excellent,” “Slow to pay,” or “Call evenings.”

If an asterisk (*) is the first character in the description, such as *Cash Only, the item does not show up on the window; the field is darkened instead. You can click the magnifying glass speed button above the status fields to reveal the text; then click it again to hide the text.

Initial Picklist The initial picklist installed with AI is not included in this document.

Gender, #106

Where It is Used The items in this picklist appear in the **Gender** list on the **Client** and **Veterinarian** tabsheets of the Operation Center window.

Link Values

Link values identify each item uniquely, and the system uses the link value to relate the gender indicator to client and veterinarian records. This means that you can change the descriptions without affecting the system's operation, but **do not change the link values**. If you change a link value, the gender indicator for all existing clients and veterinarians of that gender will be incorrect.

Display As

The display fields are used when the field is used in a macro. They allow you to create personalized letters using the correct pronouns for the client or veterinarian. The slashes separate the pronouns to substitute for macro variables.

Macro Variable	Element Substituted In Macro
CLIGENDER1 VETGENDER1 VET2GENDER1	First element (subject pronoun): they /their/them she /her/her he /his/him
CLIGENDER2 VETGENDER2 VET2GENDER2	Second element (possessive pronoun): they/ their /them she/ her /her he/ his /him
CLIGENDER3 VETGENDER3 VET2GENDER3	Third element (object pronoun): they/their/ them she/her/ her he/his/ him

For example, assume you want to create a macro to print the following in a letter to a client: "Your referring veterinarian wants you to follow up with _____ in a week." But you want to substitute the correct pronoun for the blank. You would use the macro variable VETGENDER3 instead of the blank. Then when the letter prints, if the client's veterinarian is a man (with "M" in the **Gender** field of the veterinarian record), AI substitutes "him" for the macro variable. If the veterinarian is a woman, AI substitutes "her". If the veterinarian is a group, AI substitutes "them."

However, you might want your macro to say, “Your referring veterinarian wants you to call _____ office in a week to arrange a follow-up appointment.” Then you would use the macro variable VETGENDER2. So the statement would say “his office,” or “her office” or “their office.”

Change the **Display As** values only if you are writing macros in a language other than English. Then change the pronouns to those of your language.

Other Remarks Do not change this list unless directed to do so by AIS technical support personnel.

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
B	3	they/their/them
F	2	she/her/her
M	1	he/his/him
U	0	///

Species, #108

Where It is Used The items in this picklist appear in the **Species** list on the **Patient** tabsheet of the Operation Center window.

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

Link Values On the **Patient** tabsheet, when you select a species, the list of breeds changes to correspond to your species selection. Link values in this picklist (108) indicate which picklist to use for the **Breed** field in the patient record.

Species Link Value	Associated Breed Picklist
0	101, Canine Breeds
1	102, Feline Breeds
2	103, Other Breeds.

This means that you can change the descriptions without affecting the system's operation, but **do not change the link values**. If you change the link value of a species, the breed picklist displayed for the item will not be correct.

Display As If you use the macro variable PATSPECIES1 in a macro, AI substitutes the Description text for the variable when the macro is run. If you use PATSPECIES2 in a macro, AI substitutes the Display As text for the variable.

Other Remarks You may change the Description or Display As text, but do not change the meaning of the text, and do not change the link values. If certain items do not apply in your practice, you may delete them from the list.

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
avian	2	bird
bovine	2	cow
canine	0	dog
equine	2	horse
feline	1	cat
porcine	2	pig

Sex, #109

Where It is Used The items in this picklist appear in the **Sex** list on the **Patient** tabsheet of the Operation Center window.

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

Link Values Link values identify each item as male, female, or unknown. In order to allow AI users to import data from VSS (the predecessor of AI), the link values are not unique. Nevertheless, **do not change the link values**.

Display As

The display fields are used when the field is used in a macro. They allow you to create personalized letters using the correct pronouns for the patient. The slashes separate the pronouns to substitute for macro variables.

Macro Variable	Element Substituted In Macro
----------------	------------------------------

PATSEX1	Description text
PATSEX2 **	First Display As element (gender symbol) F/female/she/her/her M/male/he/his/him U/ /it/its/it
PATSEX3	Second Display As element (gender descriptor) F/ female /she/her/her M/ male /he/his/him U/ / it /its/it
PATSEX4	Third Display As element (subject pronoun) F/female/ she /her/her M/male/ he /his/him U/ /it/ its /it
PATSEX5	Fourth Display As element (possessive pronoun) F/female/she/ her /her M/male/he/ his /him U/ /it/its/ it
PATSEX6	Fifth Display As element (object pronoun) F/female/she/her/ her M/male/he/his/ him U/ /it/its/ it

** For data compatibility with VSS, link values are not unique. When you use PATSEX2 through PATSEX6, AI pulls the appropriate element from the first list item with the same link number as the record. So, the Display As text for “female spayed” and “male neutered” are never used in macros, since “female” is the first item of link value 2 and “male” is the first item of link value 1. This has an impact only if you use PATSEX2, which substitutes the first Display As element, so FS and MN are never used in macros. (Other text is identical for identical link numbers.) This issues does not impact PATSEX1; for this variable, AI references the description text, not the link number, in the patient’s record.

For an example of how to use similar variables, refer back to the discussion of Picklist 106, Gender.

Change the **Display As** values only if you are writing macros in a language other than English. Then change the words to those of your language.

Other Remarks Do not change this list unless directed to do so by AIS technical support personnel.

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
female	2	F/female/she/her/her
female spayed	2	FS/female/she/her/her
male	1	M/male/he/his/him
male neutered	1	MN/male/he/his/him
unknown	0	U/ /it/its/it

Client Extra Field, #110

Where It is Used The items in this picklist appear on the **Client** tabsheet of the Operation Center window, in the drop-down list to the right of the **Discount** field. The label for the drop-down list is defined in the **Extra List** field on the **Settings** tabsheet of the Configuration window.

Link Values Not used.

Display As To be used as you decide.

Other Remarks This list is provided for you to use in any way you want.

Initial Picklist The initial picklist installed with AI is blank.

Appointment Book Names, #112

Where It is Used The items in this picklist appear on the **Book** list on the Appointment Book window, when the window is in Assign Mode or Schedule Mode.

Link Values The link values are stored as the book numbers, and each entry in this picklist applies to a different appointment book. **Do not change the link values.** AI uses them to access the appointment book information. If you change a link value, AI cannot display the appointment book.

The link values may also be used in filters for reports you define on the Report Generator window.

Use link values from 1 through 999 only.

Display As Not currently used.

Other Remarks Normally, these items are the names of doctors, services, or examination rooms. You may add new items, and change the descriptions of existing items without affecting the operation of AI. When you add a new item to the list the system automatically assigns the link value. Do not change this automatic link value unless you deleted an item by mistake and are adding it back.

Initial Picklist The initial picklist installed with AI contains Doctor 1 and Doctor 2. Change these to names appropriate for your system.

Client Titles, #113

Where It is Used The items in this picklist appear on the **Title** list on the **Client** tabsheet of the Operation Center window.

Link Values The link values are associated with the link values in Picklist #106, Gender. When you assign a title to a client record, AI automatically fills in the corresponding gender description. For example, if you select “Ms.” (link value 2 on this picklist) for a client, AI enters “F” (link value 2 on Picklist 106) in the gender field. However, you can change the gender selection without affecting the title selection.

Display As Not currently used.

Other Remarks Normally, do not change this list.

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
Dr.	0	
Miss	2	
Mr.	1	
Mrs.	2	
Ms.	2	

Phone Field Labels, #114

Where It is Used The items in this picklist appear on the **Category** list on the Phone Information dialog that opens when you add or modify a phone number for a client, veterinarian, or hospital on the Operation Center window.

Link Values The link values identify the phone type on the phone lists of clients, veterinarians, and hospitals. These values are also used in filters for the Phone Numbers table when that table is used in a report definition on the Report Generator window; and they can be used to provide descriptions for the phone type in reports.

Do not change the link values.

- ◆ If you change the link values, you will no longer be able to distinguish the phone types for the phone numbers in your existing records.
- ◆ If you change the link value for the Fax phone type, the Fax Server will no longer be able to automatically determine the fax phone number of the recipient.

- ♦ If you change link values, the report may include the wrong phone number or the wrong phone type description.

Display As Not currently used.

Other Remarks You may add new items. You may also change the descriptions of existing items, but be sure to keep the same meaning. When you add a new type to the list the system automatically assigns the link value. Do not change this automatic link value unless you deleted an item by mistake and are adding it back.

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
Back Line	5	
Cellular	4	
Fax	3	
Home	1	
Main Line	2	
Work	6	

Appointment Types, #115

Where It is Used The items in this picklist appear on the **Type** list on the Appointment Book window, when the window is in Assign Mode or Template Mode. The items on the list are the types of appointments you place in the schedule.

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

Link Values The link values identify the color in which the appointment type is displayed in an appointment book. Unlike many other picklists, these link values do **not** identify the items in the picklist. Both the description and the link value are stored with each appointment record.

The link value of each item is initially set when your system is installed. To adapt the color-coding to your office, reassign the link values of the types when you configure the system initially.

It is highly recommended that you do not change the link values once you have begun using the system. If you change the link values, the colors of appointment types in new records will differ from the colors of those same types in old records. You can change the colors in old records, but you must do it manually for each type in each book.

This table indicates the color associated with each link value.

Link	Color	Link	Color
0	Black	8	Silver
1	Maroon	9	Red
2	Green	10	Lime
3	Olive	11	Blue
4	Navy	12	Fuchsia
5	Purple	13	Aqua
6	Teal	14	Yellow
7	Gray	15	White

Display As Not currently used.

Other Remarks You may add, delete, or modify any of the items or the link values, we highly recommend that you do so before you begin using the Appointment Scheduler.

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
Blocked Out	11	
Initial Visit	10	
Procedure	14	
Recheck	8	
Surgery	6	
Work In	9	

Appointment Status, #116

Where It is Used The items in this picklist appear in the **Status** list on the Appointment Book window, when the window is in Assign Mode or Template Mode. These designations apply to individual appointments made in the Appointment Scheduler.

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

Link Values Not currently used.

Display As Not currently used.

Other Remarks You may add new items, and change the descriptions of existing items. Note, however, that the descriptions — not link values — are stored in appointment records, so if you change the description, the change does not take effect in existing records.

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
Admitted	0	
Completed	0	
Confirmed	0	
No Show	0	
Scheduled	0	
Waiting	0	

Appointment Templates, #117

Where It is Used The items in this picklist appear in the **Template** list on the Appointment Book window, when the window is in Assign Mode or Template Mode. These items are the names of different types of day schedules.

Link Values The link values are stored as the template numbers, and each entry in this picklist applies to a different template. **Do not change the link values.** AI uses them to access the template information. If you change a link value, AI cannot display the template.

Use link values of 1000 and higher only.

Display As Not currently used.

Other Remarks The templates in the initial list are standard, but you may add, delete, or modify any items. It is important, however, not to delete items or change any link values after you start using the Appointment Scheduler, or certain templates may not be included on the selection list.

Initial Picklist The initial picklist installed with AI follows.

Description	Link	Display As
Day Off	1004	
Receiving Afternoon	1002	
Receiving Full Day	1003	
Receiving Morning	1001	
Saturdays	1005	

Vendor Names, #118

Where It is Used The items in this picklist appear on the **Vendor** list in the Stock Information portion of the Inventory Maintenance window. This is a list of the vendors of your supplies.

Use caution if you modify descriptions that are already in use. The descriptions may be used in filters for reports you define on the Report Generator window.

Link Values Link values and descriptions are used to relate the vendor to each relevant inventory item. So **do not change the link values or descriptions of items used in an inventory record**. If you change the link value or description of a vendor, the tracking for vendors of inventory items will be inaccurate.

The link values may also be used in filters for reports you define on the Report Generator window.

Display As Not currently used.

Other Remarks When you add a new vendor to the list the system automatically assigns the link value. Do not change this automatic link value unless you deleted an item by mistake and are adding it back.

Initial Picklist The initial picklist installed with AI is blank.

Original Custom Picklists

You have complete control over the titles, items, and uses of the picklists from number 150 to 999. The following table indicates the numbers, titles, and original uses of the custom picklists installed with your AI. Some of the defined picklists are not used in standard macros shipped with AI. These initially-unused macros are provided for your convenience as samples that you might want to use in your custom macros.

Num	Picklist Title	Where it is Used
152	Vomitus	Not used in standard macros shipped with AI.
153	Stools	Not used in standard macros shipped with AI.
154	Assessment / Prognosis	PROGNOSIS macro in Medical Records folder. PHYS EXAM macro in Medical Records folder.
155	Neurological	PHYS EXAM macro in Medical Records folder.
156	Urinary	Not used in standard macros shipped with AI.
157	Seizures	Not used in standard macros shipped with AI.
158	Eyes	PHYS EXAM macro in Medical Records folder.
159	Which Eye	Not used in standard macros shipped with AI.
160	Ears	PHYS EXAM macro in Medical Records folder.
161	Nose	PHYS EXAM macro in Medical Records folder.
162	Oral Cavity	PHYS EXAM macro in Medical Records folder.
163	Which Ear	Not used in standard macros shipped with AI.
164	Abdomen	PHYS EXAM macro in Medical Records folder.
165	Musculoskeletal	PHYS EXAM macro in Medical Records folder.
166	Skin	PHYS EXAM macro in Medical Records folder.
167	Rectal	Not used in standard macros shipped with AI.
168	Heart / Lungs	PHYS EXAM macro in Medical Records folder.
169	Capillary Refill Time	Not used in standard macros shipped with AI.

Num	Picklist Title	Where it is Used
170	Mucous Membranes	Not used in standard macros shipped with AI.
172	Genitals	Not used in standard macros shipped with AI.
173	Lymph Nodes	PHYS EXAM macro in Medical Records folder.
174	Pulse Quality	PHYS EXAM macro in Medical Records folder.

