

Horse Care Providers

Veterinarians Veterinarian Specialist Care Technicians Farrier Farrier Specialist

Horse Care Providers

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Horse Care Providers – Veterinarians

Path: Home: Horse: Horse Care Providers: Veterinarians

There are no prerequisites.

Think/Plan before you setup the business's veterinarians! equineGenie allows for multiple veterinarians. The primary veterinarian should be the veterinarian who is called first when a veterinarian's services are required. Secondary veterinarians should be veterinarians called if a primary veterinarian is not available.

Note: equineGenie makes veterinarians vendors. A veterinarian must have their vendor financial information completed on the Vendor Setup screen. Path – Home: Financials: Financial Business Setup: Vendor Setup.

equineGenie Horse Care providers - Veterinarians	- 🗆 X
د Veterinarians	ළ Veterinarian Comments
Enter or Select A Primary Veterinarian 🕕 💌	
Address	
City, State, Zip Code	
Telephone (2) Emergency Phone	Enter 1 Video Tutorial 💟
email Address	
Website URL (Address)	
Add To Address Book (3)	Popup
Enter or Select A Secondary Veterinarian 🕢 💌	Red Flag
Address	equineDenie
City, State, Zip Code	Notes
Telephone (5) Emergency Phone	E
email Address	60 To Vet Financial Account (7)
Website URL (Address)	Go To 2nd Vet Financial Account (8)
📕 Add To Address Book 🌀	🔏 📕 Remove Selected Primary Vet (9)
膏 😈 📕 View Veterinarians 2	💰 📕 Remove Selected Secondary Vet 🜘

① Enter the business's primary veterinarian in the Enter or Select A Primary Veterinarian dropdown.

Note 1: After a primary veterinarian has been entered it can be recalled by **Selecting** the veterinarian from the Enter or Select A Primary Veterinarian dropdown. equineGenie allows you to enter multiple primary veterinarians.

Hint: To enter another primary veterinarian select [New Primary Veterinarian] from the Enter or Select A Primary Veterinarian dropdown and enter another primary veterinarian.

2 Enter a primary veterinarian's contact information.

③ A primary veterinarian's contact information can be added to equineGenie's address book by selecting the '*Add To Address Book*' button.

Note 2: The primary veterinarian's information added to the system's address book is the contact information entered on this screen. The address book screen provides for additional information. If addition information needs to be added it can be added on the address book screen. *Path – Home: Calendar Contacts: Contacts: Address Book*.

Enter the business's secondary veterinarian in the Enter or Select A Secondary Veterinarian dropdown.

Note 3: After a secondary veterinarian has been entered it can be recalled by **Selecting** the veterinarian from the Enter or Select A Secondary Veterinarian dropdown. equineGenie allows you to enter as many secondary veterinarians as required.

Hint: To enter multiple secondary veterinarians select [New Secondary Veterinarian] from the Enter or Select A Secondary Veterinarian dropdown and enter another secondary veterinarian.

5 Enter a secondary veterinarian's contact information.

6 A secondary veterinarian's contact information can be added to equineGenie's address book by selecting the '*Add To Address Book*' button.

Note 4: The secondary veterinarian's information added to the system's address book is the contact information entered on this screen. The address book screen provides for additional information. If addition information needs to be added it can be added on the address book screen. *Path – Home: Calendar Contacts: Contacts: Address Book*.

Selecting the 'Go To Vet Financial Account' will enter the information entered on the 'Horse Care Providers – Veterinarians' screen and display the 'Financial – Vendor / Supplier Account Setup' screen. After completing the primary veterinarian financial setup, selection of the return symbol ull will redisplay the 'Horse Care Providers – Veterinarians' screen.

Note 5: All veterinarians enter are considered vendors and must have an account number even if they are paid cash at each appointment.

8 Selecting the 'Go To 2nd Vet Financial Account' will enter the information entered on the 'Horse Care Providers – Veterinarians' screen and display the 'Financial – Vendor / Supplier Account Setup' screen. After completing the secondary veterinarian financial setup, selection of the return symbol will redisplay the 'Horse Care Providers – Veterinarians' screen. See Note 5.

If you need to remove a Primary Veterinarian, the veterinarian can be removed by selecting and displaying the veterinarian and then, selecting the Remove Selected Primary Vet Red button. When the button is selected a Delete Item popup will be displayed to make sure you want to remove the selected primary veterinarian.

Are sure you	want to delete
this	item?
ок	Cancel

Selecting **OK** will remove the selected primary veterinarian.

If you need to remove a Secondary Veterinarian, the veterinarian can be removed by selecting and displaying the veterinarian and then, selecting the Remove Selected Secondary Vet Red button. When the button is selected a Delete Item popup will be displayed to make sure you want to remove the selected secondary veterinarian.

Are sure you	want to delet
this	item?
OK	Cancel

Selecting **OK** will remove the selected secondary veterinarian.

Select Enter before leaving the Horse Care Providers – Veterinarian setup screen.

Selection of the 'View Veterinarians' will enable the business's veterinarians to be viewed, exported and/or printed.

Horse Care Providers – Veterinarian Specialist

Path: Home: Horse: Horse Care providers: Vet Specialist

There is a prerequisite required. Before a horse can be selected, the horse must have been entered in equineGenie, (Horses: Information: Identification).

equineGenie allows you to assign a veterinarian specialist to a horse. equineGenie also allows you to assign a non-specialist veterinarian to a specific horse. Think/Plan before you setup a veterinarian specialist or assign a veterinarian to a horse!

Note: equineGenie makes veterinarian specialist vendors. A veterinarian specialist or a new veterinarian assigned to a horse must have their vendor financial information completed on the Vendor Setup screen. Path – Home: Financials: Financial Business Setup: Vendor Setup.



Select a horse from the Select Horse dropdown.

- ② Enter or Select a veterinarian to be assigned to the selected horse or identified for special veterinarian care for the selected horse.
- (3) If the entered or selected veterinarian is a veterinarian specialist select the Veterinarian Specialist? (RED No' button changing it to a 'GREEN Yes'.

Note 1: If the entered or selected veterinarian is not a veterinarian specialist do not select the Veterinarian Specialist? button.

④ Enter or Select the veterinarians purpose or specialty.

Note 2: If the entered or selected veterinarian is not identified as a specialist, enter the horse/veterinarian assigned purpose. If the entered or selected veterinarian is identified as a specialist, enter the veterinarian's specialty.

- **5** Enter the veterinarian's contact information.
- 6 The veterinarian and their contact information can be added to equineGenie's address book by selecting the '*Add To Address Book*' button.

Note 3: The veterinarian's information added to the system's address book is the contact information entered on this screen. The address book screen provides for additional information. If addition information needs to be added it can be added on the address book screen. *Path – Home: Calendar Contacts: Contacts: Address Book*.

Selecting the 'Go To Vet Specialist Financial Account' will enter the information entered on the 'Horse Care Providers – Assigned Veterinarian or Specialist' screen and display the 'Financial – Vendor / Supplier Account Setup' screen. After completing the veterinarian financial setup, selection of the return symbol will redisplay the 'Horse Care Providers – Assigned Veterinarian or Specialist' screen.

Note 5: All veterinarians enter are considered vendors and must have an account number even if they are paid cash at each appointment. If the assigned veterinarian or specialist has been previously entered, the '*Go To Vet Specialist Financial Account*' <u>does not</u> need to be selected. If the assigned veterinarian or specialist is <u>not compensated</u> by the business, a financial account <u>does not</u> need to be setup.

(8) If you need to remove an assigned Veterinarian or specialist, the veterinarian can be removed by selecting and displaying the veterinarian and then, selecting the Remove Selected Vet Specialist Red button. When the button is selected a Delete Item popup will be displayed to make sure you want to remove the selected veterinarian.

Are sure you	want to delete
this	item?
OK	Cancel

Selecting **OK** will remove the selected veterinarian.

9 Select Enter before leaving the Horse Care Providers – Vet Specialist setup screen.

1 Selection of the '*View Veterinarian Specialist*' will enable the business's veterinarian specialist to be viewed, exported and/or printed.

Horse Care Providers – Care Technicians

Path: Home: Horse: Horse Care Providers: Care Technicians

There are no prerequisites.

Think/Plan before you setup the business's care technicians! equineGenie allows for multiple care technicians. Care technicians are horse care providers that provide care to the business's horses that <u>do not</u> require a veterinarian or farrier.

Note: equineGenie makes a paid care technicians vendors. A care technician must have their vendor financial information completed on the Vendor Setup screen. Path – Home: Financials: Financial Business Setup: Vendor Setup.

equineGenie Horse Care Providers - Care Technicians	-
Enter or Select A Care Technician Control	Care Technician Comments
Area Of Responsibility (2)	
Address	
City, State, Zip Code	
Telephone 3 Cell Phone	🔲 Enter 🥜 Video Tutorial 🛂
email Address	
Website URL (Address)	
Add To Address Book ④	Рорир
🏅 🔳 Go To Care Tech Financial Account*(5)	And Red Flag
*NOTE: A Care Tech doesn't need a	e e
financial account if the Care Tech	equinegenie
is not paid or has been previously	Notes
identified as part of the business.	3
🥉 📕 Remove Selected Care Tech 🌀	View Care Technicians 1
🔶 U	

① Enter the business's care technician in the Enter or Select A Care Technician dropdown.

Note 1: After a care technician has been entered it can be recalled by **Selecting** the care technician from the Enter or Select A Care Technician dropdown. equineGenie allows you to enter multiple care technicians.

2 Enter a care technician's are of responsibility.

Hint: A care technician's area of responsibility can be for vaccinations, deworming, foal training, leg wrapping, etc.

3 Enter a care technician's contact information.

A care technician's contact information can be added to equineGenie's address book by selecting the 'Add To Address Book' button.

Note 2: The care technician's information added to the system's address book is the contact information entered on this screen. The address book screen provides for additional information. If addition information needs to be added it can be added on the address book screen. *Path – Home: Calendar Contacts: Contacts: Address Book*.

Selecting the 'Go To Care Tech Financial Account' will enter the information entered on the 'Horse Care Providers – Care Technicians' screen and display the 'Financial – Vendor / Supplier Account Setup' screen. After completing the care technicians financial setup, selection of the return symbol unit redisplay the 'Horse Care Providers – Care Technicians' screen.

Note 3: All care technicians enter are considered vendors if they are compensated for their care technician work. They must have an account number even if they are paid cash. If a care technician is not compensated, they <u>do not</u> need an account number. The 'Go To Care Tech Financial Account' button <u>does not</u> need to be selected. A vendor financial account <u>does not</u> need to be setup.

(6) If you need to remove a care technician, the care technician can be removed by selecting and displaying the care technician and then, selecting the Remove Selected Care Tech Red button. When the button is selected a Delete Item popup will be displayed to make sure you want to remove the selected care technician.



Selecting **OK** will remove the selected care technician.

Select Enter before leaving the Horse Care Providers – Care Technician setup screen.

O Selection of the '*View Care Technicians*' will enable the business's veterinarians to be viewed, exported and/or printed.

Horse Care Providers – Farriers

Path: Home: Horse: Horse Care Providers: Farriers

There are no prerequisites.

Think/Plan before you setup the business's farriers! equineGenie allows for multiple farriers. The primary farrier should be the farrier who is called first when a farrier's services are required. Secondary farriers should be farriers called if the primary farrier is not available.

Note: equineGenie makes farriers vendors. A farrier must have their vendor financial information completed on the Vendor Setup screen. Path – Home: Financials: Financial Business Setup: Vendor Setup.

equineGenie Horse Care Provider - Farrier	-" 🗆 X
E Farriers	\mathcal{E} Farrier Comments
Enter or Select A Primary Farrier 🚺 💌	
Address	
City, State, Zip Code	
Telephone ② Emergency Phone	Enter 1 Video Tutorial 2
email Address	
Website URL (Address)	to an
Add To Address Book (3)	Popup And
Enter or Select A Secondary Farrier 🕢 💌	Red Flag
Address	equineDenie
City, State, Zip Code	Notes
Telephone (5) Emergency Phone	S
email Address	
Website URL (Address)	Go To 2nd Farrier Financial Account (8)
🔲 Add To Address Book 🌀	Example 2 Remove Selected Primary Farrier (9)
👚 😈 🧮 View Farriers 2	👌 🧮 Remove Selected Secondary Farrier 🕦

① Enter the business's primary farrier in the Enter or Select A Primary Farrier dropdown.

Note 1: After a primary farrier has been entered it can be recalled by **Selecting** the farrier from the Enter or Select A Primary Farrier dropdown. equineGenie allows you to enter multiple primary farriers.

Hint: To enter another primary farrier select [New Primary Farrier] from the Enter or Select A Primary Farrier dropdown and enter another primary farrier.

2 Enter a primary farrier's contact information.

3 A primary farrier's contact information can be added to equineGenie's address book by selecting the 'Add To Address Book' button.

Note 2: The primary farrier's information added to the system's address book is the contact information entered on this screen. The address book screen provides for additional information. If addition information needs to be added it can be added on the address book screen. *Path – Home: Calendar Contacts: Contacts: Address Book*.

④ Enter the business's secondary farrier in the Enter or Select A Secondary Farrier dropdown.

Note 3: After a secondary farrier has been entered it can be recalled by **Selecting** the farrier from the Enter or Select A Secondary Farrier dropdown. equineGenie allows you to enter as many secondary farriers as required.

Hint: To enter multiple secondary farriers select [New Secondary Farrier] from the Enter or Select A Secondary Farrier dropdown and enter another secondary farrier.

5 Enter a secondary farrier's contact information.

6 A secondary farrier's contact information can be added to equineGenie's address book by selecting the '*Add To Address Book*' button.

Note 4: The secondary farrier's information added to the system's address book is the contact information entered on this screen. The address book screen provides for additional information. If addition information needs to be added it can be added on the address book screen. *Path – Home: Calendar Contacts: Contacts: Address Book*.

Selecting the 'Go To Farrier Financial Account' will enter the information entered on the 'Horse Care Providers – Farrier' screen and display the 'Financial – Vendor / Supplier Account Setup' screen. After completing the primary farrier financial setup, selection of the return symbol will redisplay the 'Horse Care Providers – Farrier' screen.

Note 5: All farriers enter are considered vendors and must have an account number even if they are paid cash at each appointment.

Selecting the 'Go To 2nd Farrier Financial Account' will enter the information entered on the 'Horse Care Providers – Farrier' screen and display the 'Financial – Vendor / Supplier Account Setup' screen. After completing the secondary farrier financial setup, selection of the return symbol use will redisplay the 'Horse Care Providers – Farrier' screen. See Note 5. If you need to remove a Primary Farrier, the farrier can be removed by selecting and displaying the farrier and then, selecting the Remove Selected Primary Farrier Red button. When the button is selected a Delete Item popup will be displayed to make sure you want to remove the selected primary farrier.

Are sure you	want to delete
this	item?
ок	Cancel

Selecting **OK** will remove the selected primary farrier.

If you need to remove a Secondary Farrier, the farrier can be removed by selecting and displaying the farrier and then, selecting the Remove Selected Secondary Farrier Red button. When the button is selected a Delete Item popup will be displayed to make sure you want to remove the selected secondary farrier.

ete item	
Are sure you this i	want to delete tem?
OK	Cancel

Selecting **OK** will remove the selected secondary farrier.

1 Select Enter before leaving the Horse Care Providers – Farrier setup screen.

2 Selection of the '*View Farriers*' will enable the business's farriers to be viewed, exported and/or printed.

Horse Care Providers – Farrier Specialist

Path: Home: Horse: Horse Care providers: Farrier Specialist

There is a prerequisite required. Before a horse can be selected a horse must be entered in equineGenie, (Horses: Information: Identification).

equineGenie allows you to assign a farrier specialist to a horse. equineGenie also allows you to assign a non-specialist farrier to a specific horse. Think/Plan before you setup a farrier specialist or assign a farrier to a horse!

Note: equineGenie makes farrier specialist vendors. A farrier specialist or a new farrier assigned to a horse must have their vendor financial information completed on the Vendor Setup screen. Path – Home: Financials: Financial Business Setup: Vendor Setup.



① Select a horse from the Select Horse dropdown.

2 Enter or Select a farrier to be assigned to the selected horse or identified for special farrier work for the selected horse.

③ If the entered or selected farrier is a farrier specialist select the Farrier Specialist? 'RED No' button changing it to a 'GREEN Yes'.

Note 1: If the entered or selected farrier is not a farrier specialist do not select the Farrier Specialist? button.

④ Enter or Select the farrier's purpose or specialty.

Note 2: If the entered or selected farrier is not identified as a specialist, enter the horse/farrier assigned purpose. If the entered or selected farrier is identified as a specialist, enter the farrier's specialty.

- **5** Enter the farrier's contact information.
- **(6)** The farrier's contact information can be added to equineGenie's address book by selecting the '*Add To Address Book*' button.

Note: The farrier's information added to the system's address book is the contact information entered on this screen. The address book screen provides for additional information. If addition information needs to be added it can be added on the address book screen. *Path – Home: Calendar Contacts: Contacts: Address Book.*

Selecting the 'Go To Farrier Specialist Financial Account' will enter the information entered on the 'Horse Care Providers – Assigned Farrier or Specialist' screen and display the 'Financial – Vendor / Supplier Account Setup' screen. After completing the farrier financial setup, selection of the return symbol ull will redisplay the 'Horse Care Providers – Assigned Farrier or Specialist' screen.

Note 5: All farriers enter are considered vendors and must have an account number even if they are paid cash at each appointment. If the assigned farrier or specialist has been previously entered, the 'Go To Farrier Specialist Financial Account' does not need to be selected. If the assigned farrier or specialist is <u>not compensated</u> by the business, a financial account <u>does not</u> need to be setup.

(8) If you need to remove an assigned Farrier or specialist, the farrier can be removed by selecting and displaying the farrier and then, selecting the Remove Selected Farrier Specialist Red button. When the button is selected a Delete Item popup will be displayed to make sure you want to remove the selected farrier.



Selecting **OK** will remove the selected farrier.

9 Select Enter before leaving the Horse Care Providers – Farrier Specialist setup screen.

1 Selection of the '*View Farrier Specialist*' will enable the business's farriers to be viewed, exported and/or printed.