ePetHealth Dashboard
Dashboard Planning
ClienTrax
Windows & Mac

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Introduction

The ePetHealth dashboard's function is to automate the extraction and synchronization of practice data. The dashboard allows the user to explicitly set what data they want to include in their extraction based on the categories in their database and then set a recurring schedule to extract this data. In order to expedite the dashboard configuration, the practice will need to consider the selections below to include or exclude specific data.

**Please Note: It is highly advised that the practice complete all Windows updates on the server/workstation where the ePetHealth dashboard will be installed. This will expedite the dashboard installation process.*

Configure

Selections

Click on the Configure button from the Options tab to configure the data that will be extracted from the practice database.

The available Synchronized Record Types are Client Types, Patient Species, Appointments, Chronological, Reminders, Boarding, Diagnosis, Dietary, Examination, Grooming, Injections, Laboratory, Lameness, Medications, Preventative, Problems, Radiology, Reproductive, Surgeries and Vaccinations.

Each Record Type can be easily customized to match the Categories of the Practice Management System. All information shown in the dashboard is pulled directly from the Practice Management System.

The 'Selections' tab allows you to choose what data will be extracted. Highlighting a Record Type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient and appointment sections display a count of records represented by each option.

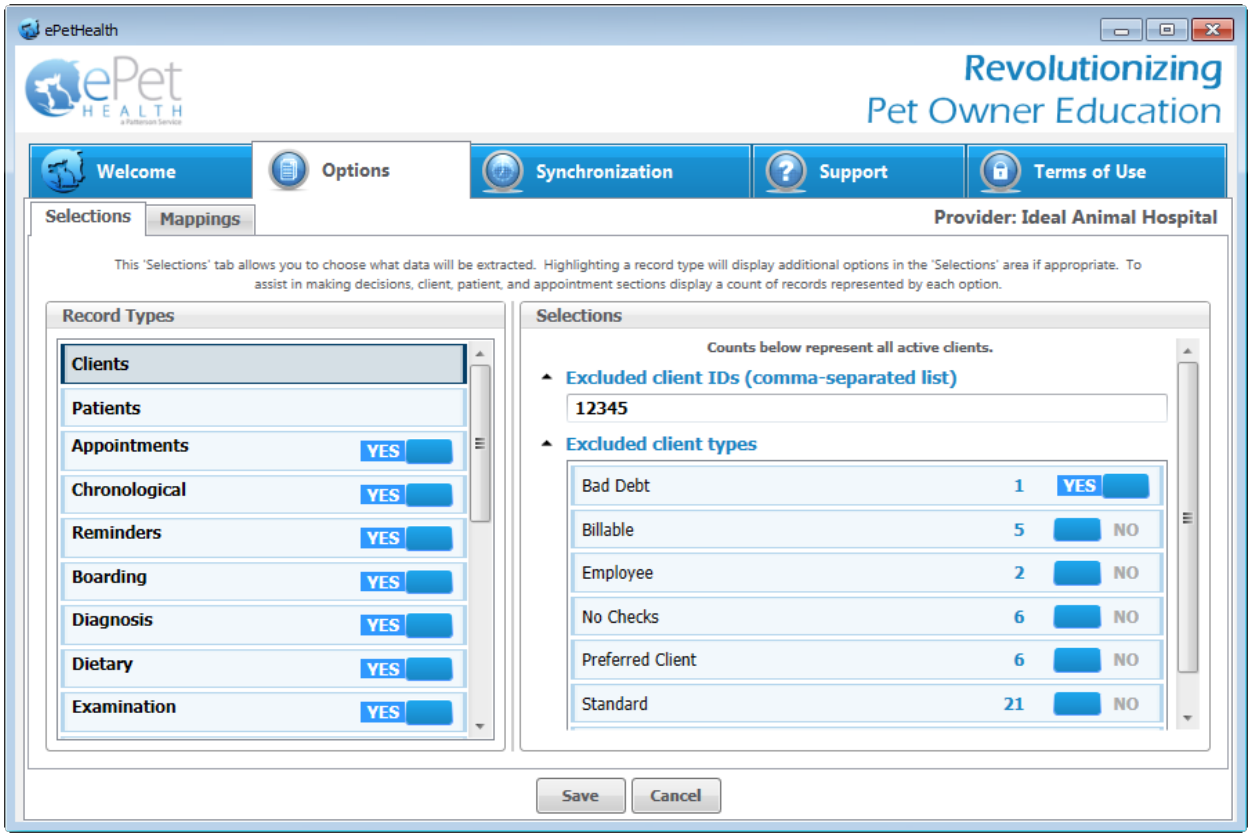
Please note: A variety of Pet Owner Communications can be affected by the Selections made. Notification Alerts can be found on Selections that can hinder such things as Appointment Confirmations, Satisfaction Surveys and Health Reminders.

Client Selections

- Classification codes / Client Types can be included or excluded on a per site basis, by first expanding each Selection area then toggling the 'yes/no' indicator to exclude (yes) or include (no).
  - In ClienTrax, there are two types of client types: Alert Color and Client Type. For more information on how this is handled, see ClienTrax Filter Data | Client Filtering at the end of this document.

- Clients may be excluded by entering a specific client ID or selecting from the listed client types.
  - When adding multiple client IDs, simply add a comma between each client ID.
  - If a client ID or type is excluded, any clients with that ID or type will not be included in the synchronization, and will not be able to log into their ePetHealth Client Portal.

- All clients will be included in the synchronization if the client filtering options are left to the default ('no' to include) in a new installation.

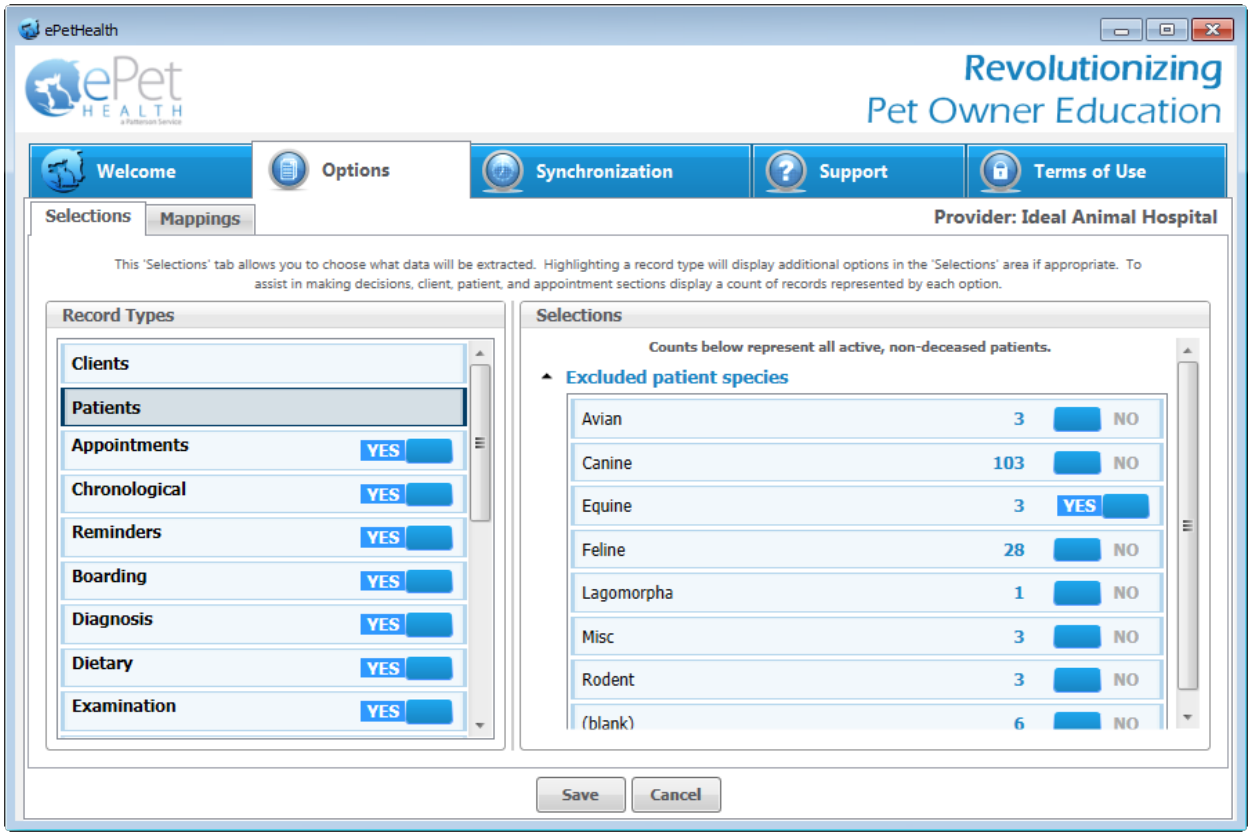


Patient Selections

- Each site has the option to include or exclude patients based on their species type, by first expanding the Selection area then toggling the 'yes/no' indicator to exclude (yes) or include (no).

- All patients with the excluded species will not be included in the synchronization and will not be viewable in the ePetHealth Client Portal.

- All patients will be included in the synchronization if the patient filtering options are left to the default ('no' to include) in a new installation.



Appointment Selections

- Each site has the option to include or exclude appointments based on the following selections, by first expanding the Selection area then toggling the 'yes/no' indicator to exclude (yes) or include (no).
  - a specific provider/resource
  - appointment types
  - appointment statuses

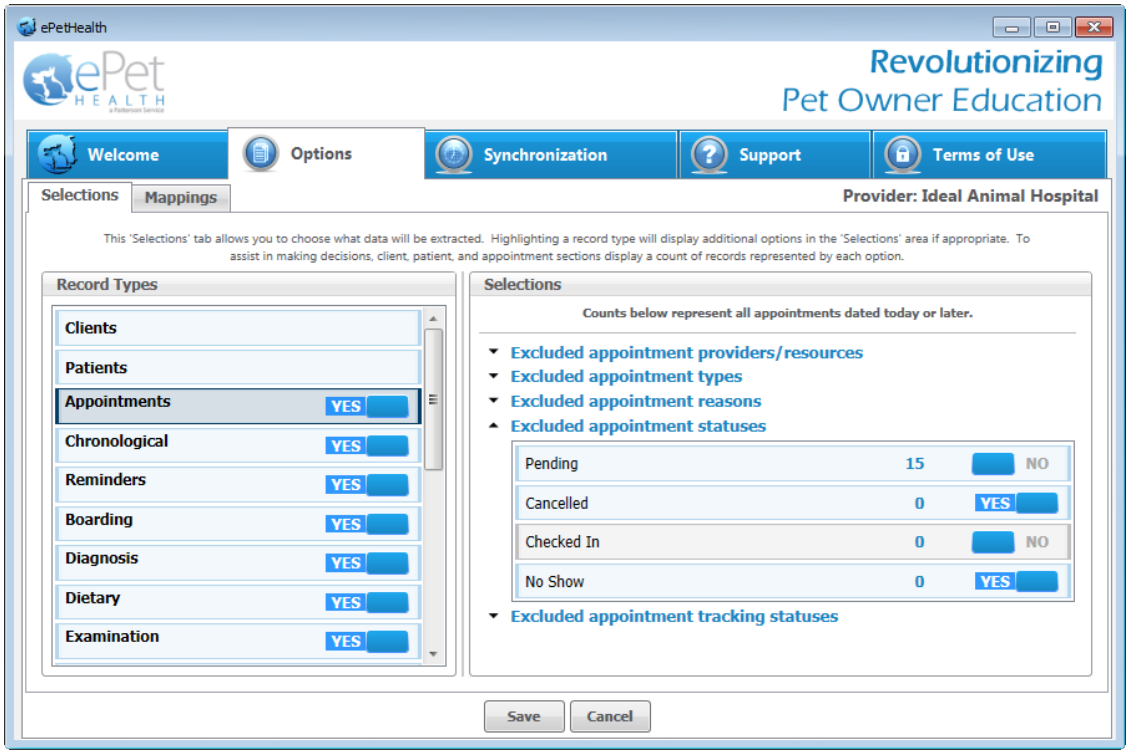
  ClienTrax contains free-form appointment reasons, so they are not included as a filter option. Appointment tracking statuses are not supported.

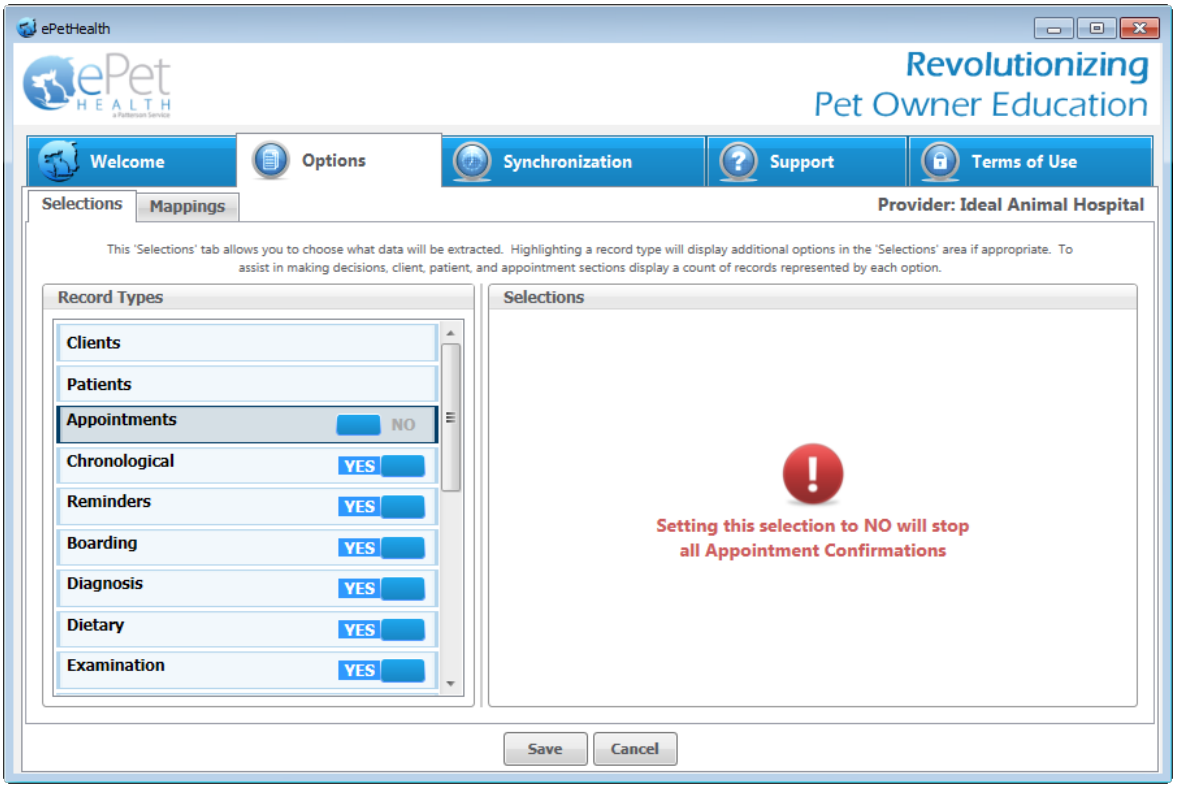
- All appointments with excluded criteria will not be included in the synchronization and will not be viewable in the ePetHealth Client Portal.

- All appointments will be included in the synchronization if the appointment filtering options are left to the default ('no' to include) in a new installation.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- If the Appointment Selection is set to No, confirmation emails for appointments will not be sent to pet owners. A notification alert such as the one shown below will appear.

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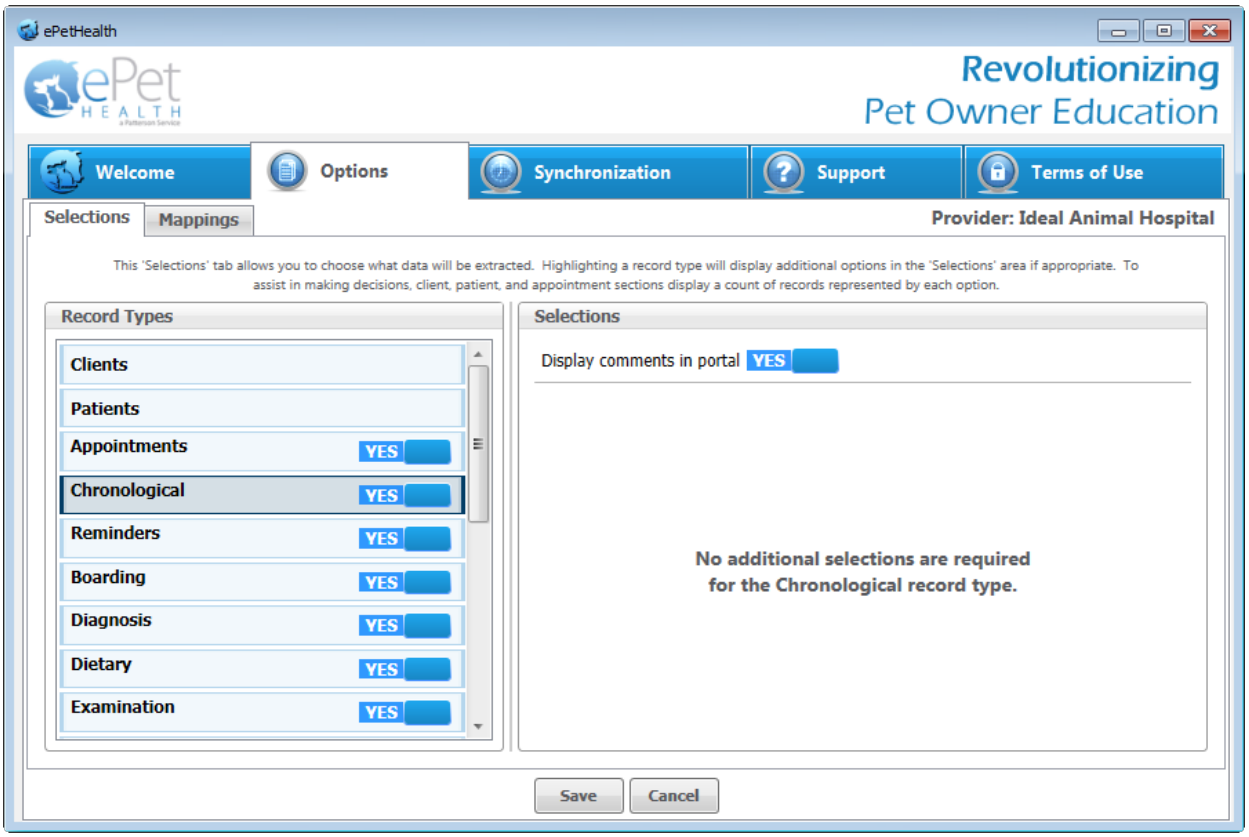
This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Clients
Patients
Appointments NO
Chronological YES
Reminders YES
Boarding YES
Diagnosis YES
Dietary YES
Examination YES
Selections
Setting this selection to NO will stop all Appointment Confirmations
Save
Cancel

Chronological Selections

- The Chronological Record Type will display the Chronological history of the patient in the ePetHealth Client Portal. Date, time, description, quantity and notes (comments) are displayed. Problems and Diagnoses are not included in Chronological history.

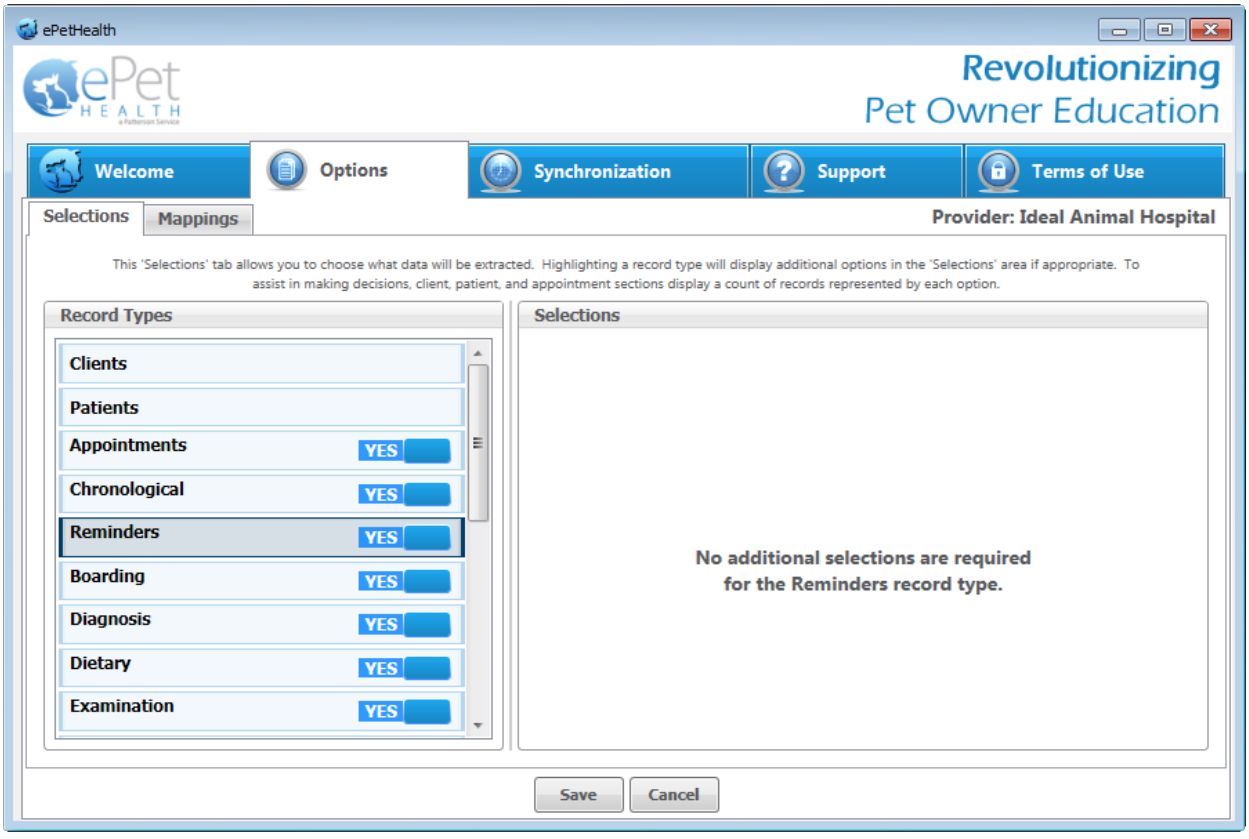
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

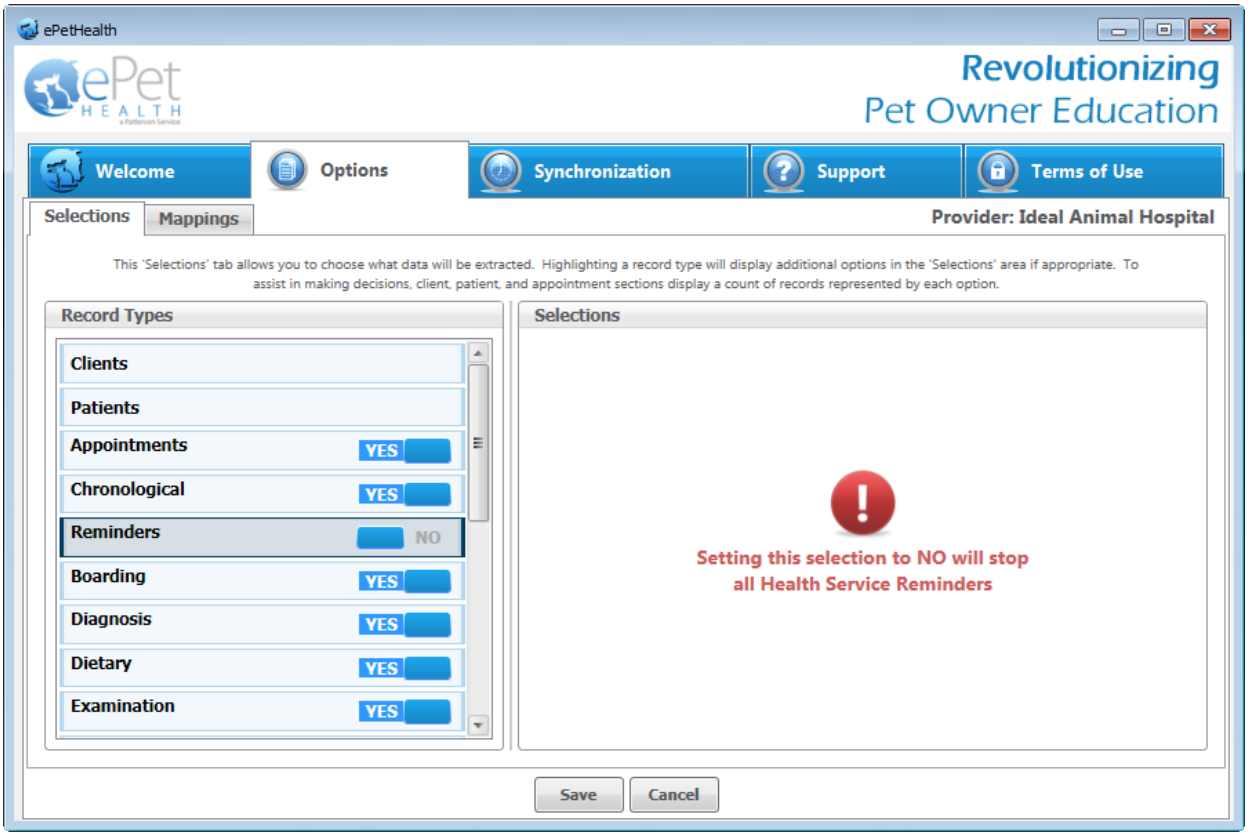
- At this time, only the option to display comments (notes) is customizable in the Selections table. This option is deselected (excluded) by default.



Reminders Selections

- The Reminders Record Type will display upcoming and overdue reminders of the patient in the ePetHealth Client Portal. Date due and description is displayed.
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.
- At this time, no additional selections are required for this Reminders record type.
- If the Reminders Selection is set to No, reminder emails for upcoming and overdue Health Service Reminders will not be sent to pet owners. A notification alert such as the one shown below will appear.

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Record Types
Clients
Patients
Appointments YES
Chronological YES
Reminders NO
Boarding YES
Diagnosis YES
Dietary YES
Examination YES
Selections
Setting this selection to NO will stop all Health Service Reminders
Save
Cancel

Boarding Selections

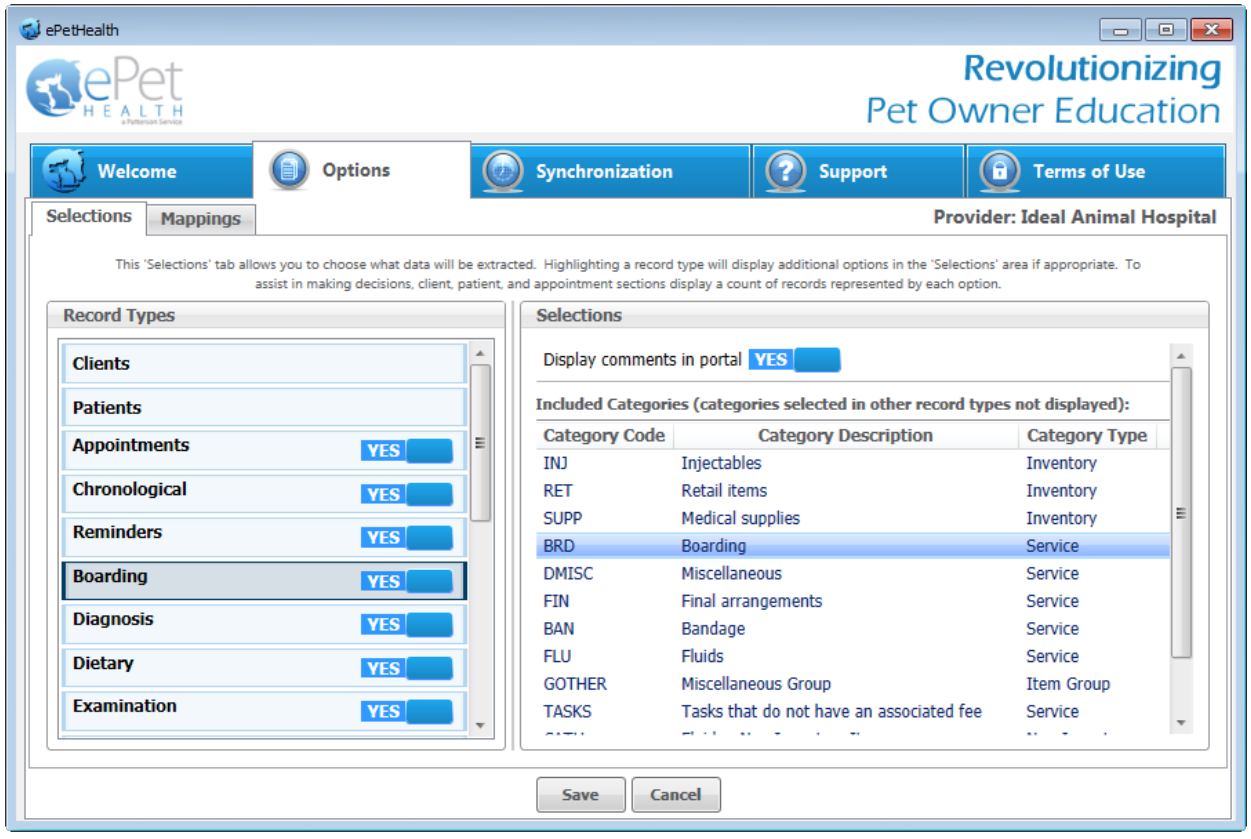
- The Boarding Record Type will display any Boarding items the patient may have on file in the Practice Management System. Date, time, description, quantity and notes (comments) are displayed in the ePetHealth Client Portal.

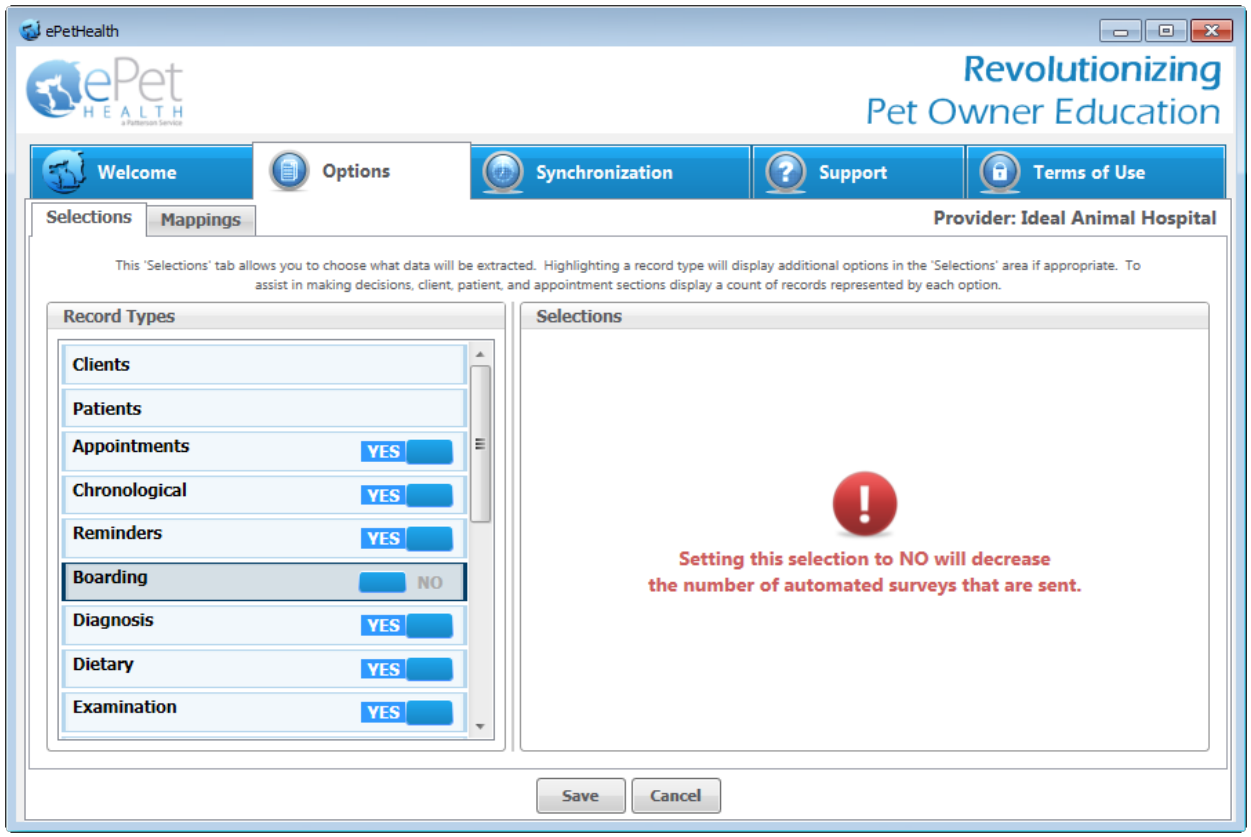
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Boarding.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.

- If the Boarding Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.

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This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Clients
Patients
Appointments YES
Chronological YES
Reminders YES
Boarding NO
Diagnosis YES
Dietary YES
Examination YES
Selections
Setting this selection to NO will decrease the number of automated surveys that are sent.
Save
Cancel

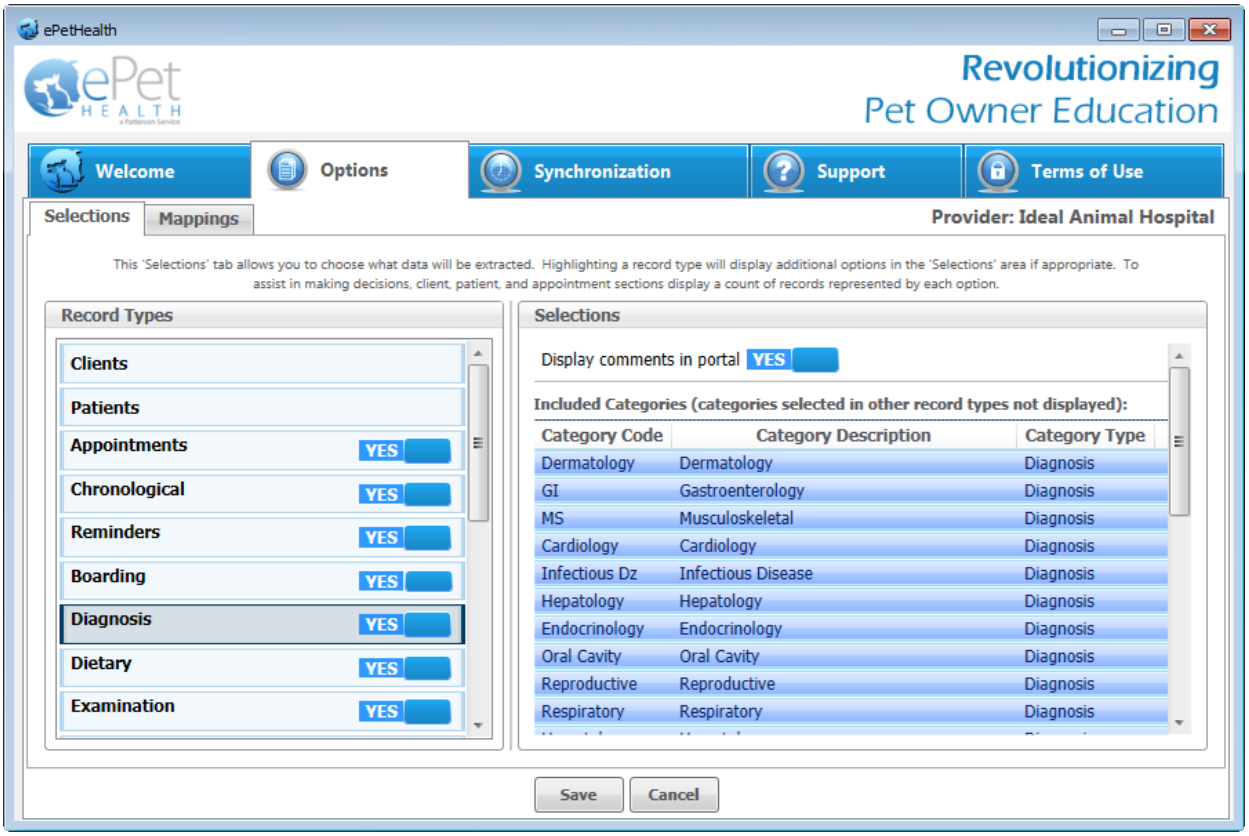
Diagnosis Selections

- The Diagnosis Record Type will display any Diagnoses the patient may have on file in the Practice Management System. Date, time, description, quantity and notes (comments) are displayed in the ePetHealth Client Portal.

- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
    - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Diagnosis.
    - Selections are not limited to Category Codes that exactly match the Category type.
    - Select as many or as few Category Codes as needed.
    - Any Categories selected in another Record Type will not be displayed.



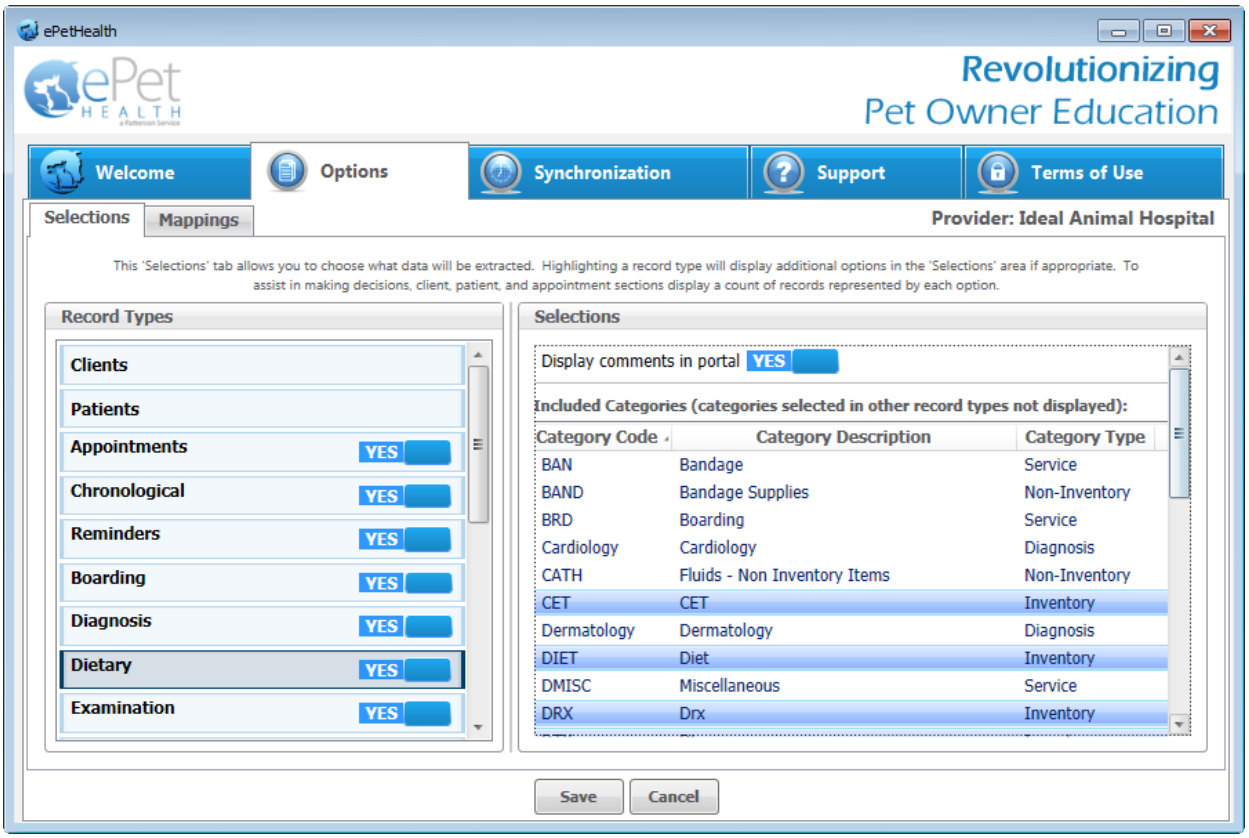
Dietary Selections

- The Dietary Record Type will display the dietary items purchased by the client for the particular patient when viewed in the ePetHealth Client Portal. The date given, time given, description, quantity and notes (comments) are displayed. If the item is a prescription, the ability to request a refill in the Client Portal may also be enabled based on the Provider Portal settings.

- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Dietary.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.



Examination Selections

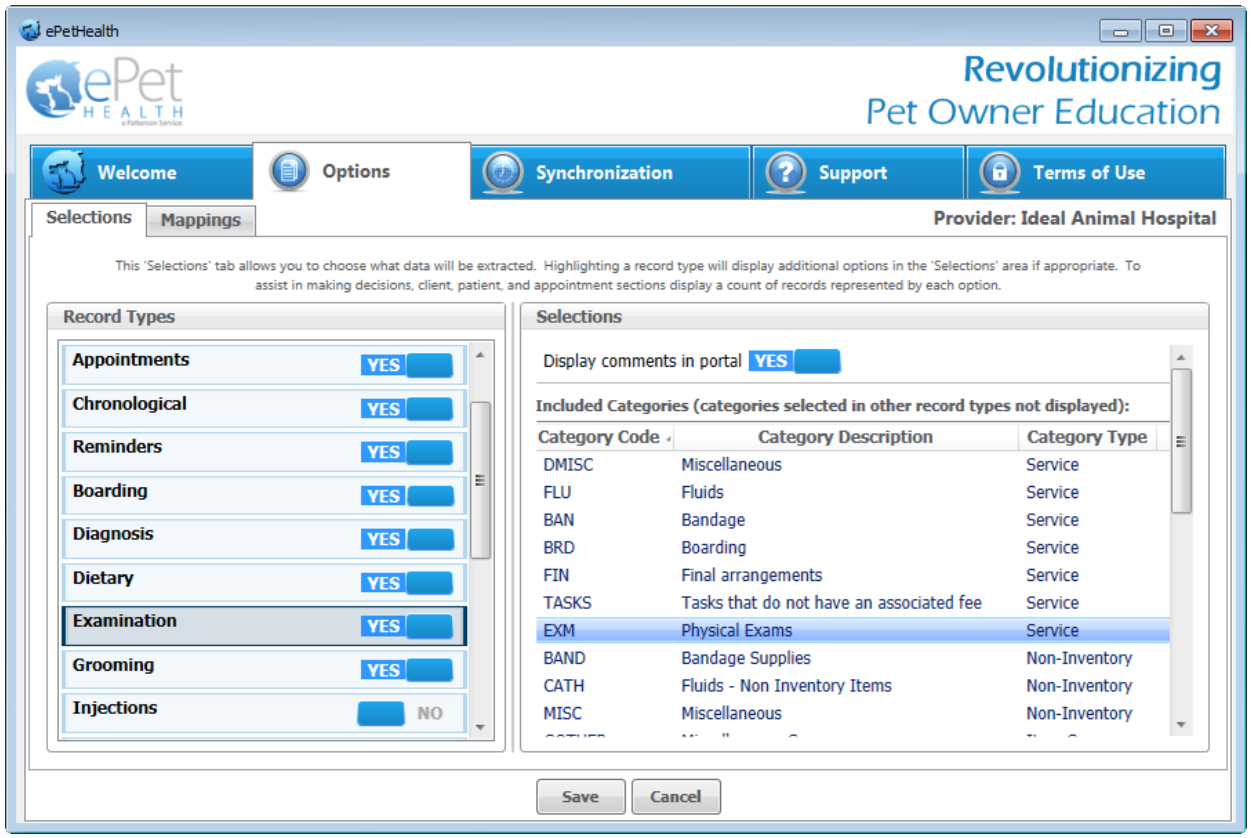
- The Examination Record Type will display any exam items the patient may have received. The date, time, description, quantity and notes (comments) are displayed.

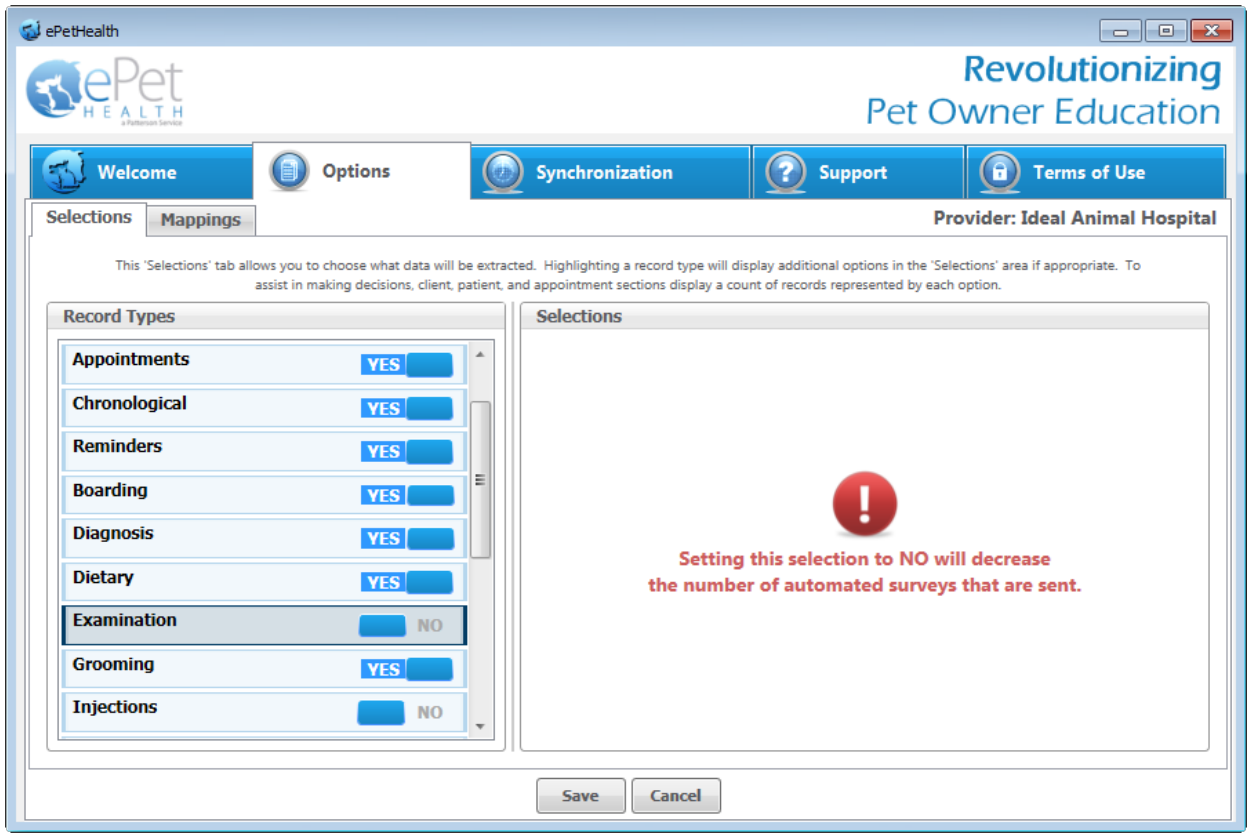
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Examinations.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.

- If the Examination Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.

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This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Appointments YES
Chronological YES
Reminders YES
Boarding YES
Diagnosis YES
Dietary YES
Examination NO
Grooming YES
Injections NO
Selections
Setting this selection to NO will decrease the number of automated surveys that are sent.
Save
Cancel

Grooming Selections

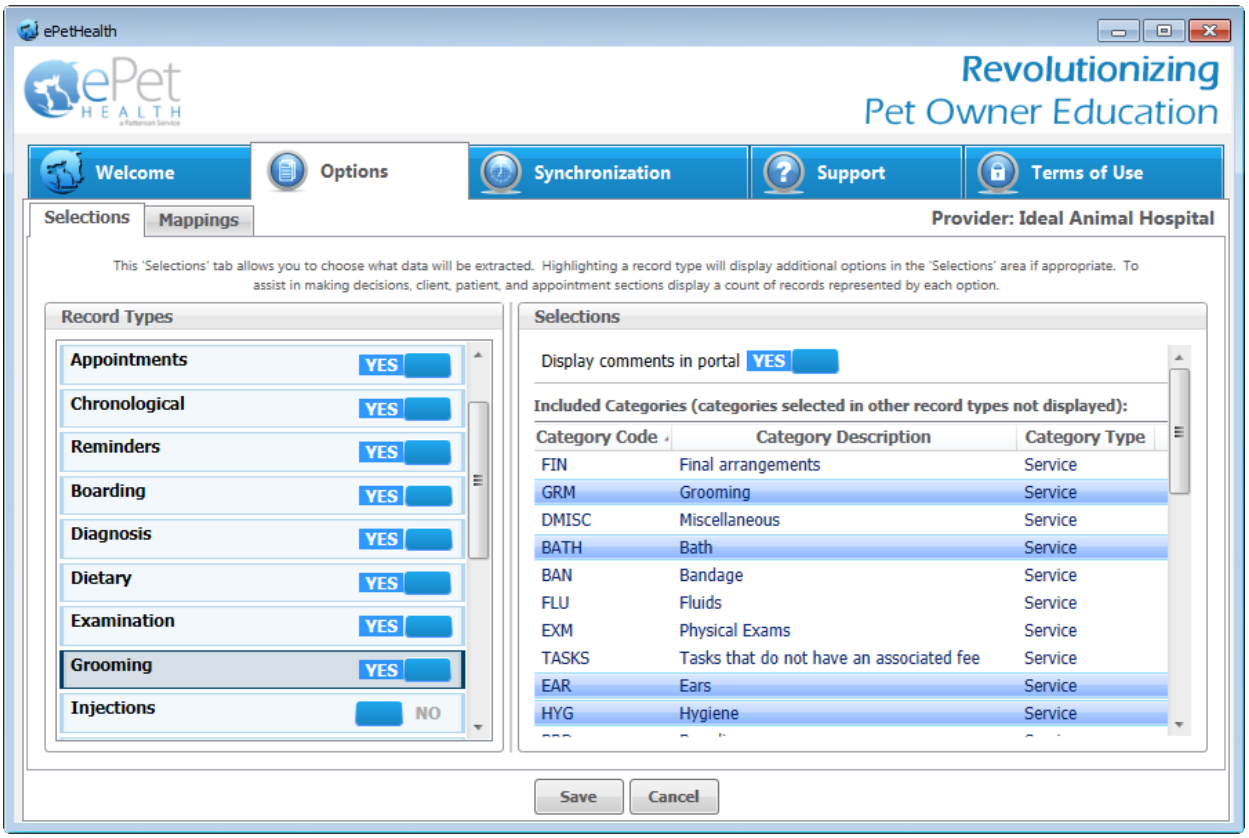
- The Grooming Record Type will display any Grooming items the patient may have received. The date, time, description, quantity and notes (comments) are displayed.

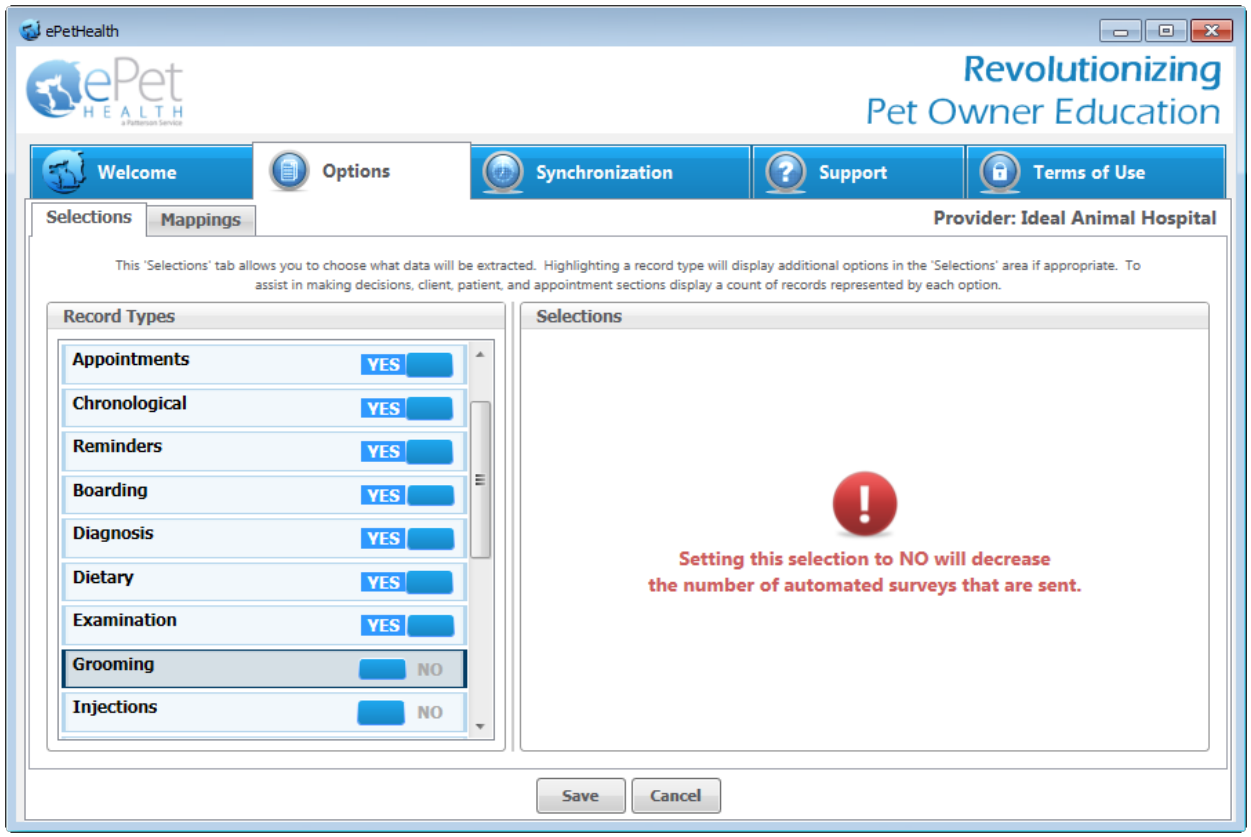
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Grooming.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.

- If the Grooming Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.

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Record Types
Appointments YES
Chronological YES
Reminders YES
Boarding YES
Diagnosis YES
Dietary YES
Examination YES
Grooming NO
Injections NO
Selections
Setting this selection to NO will decrease the number of automated surveys that are sent.
Save
Cancel

Injections Selections

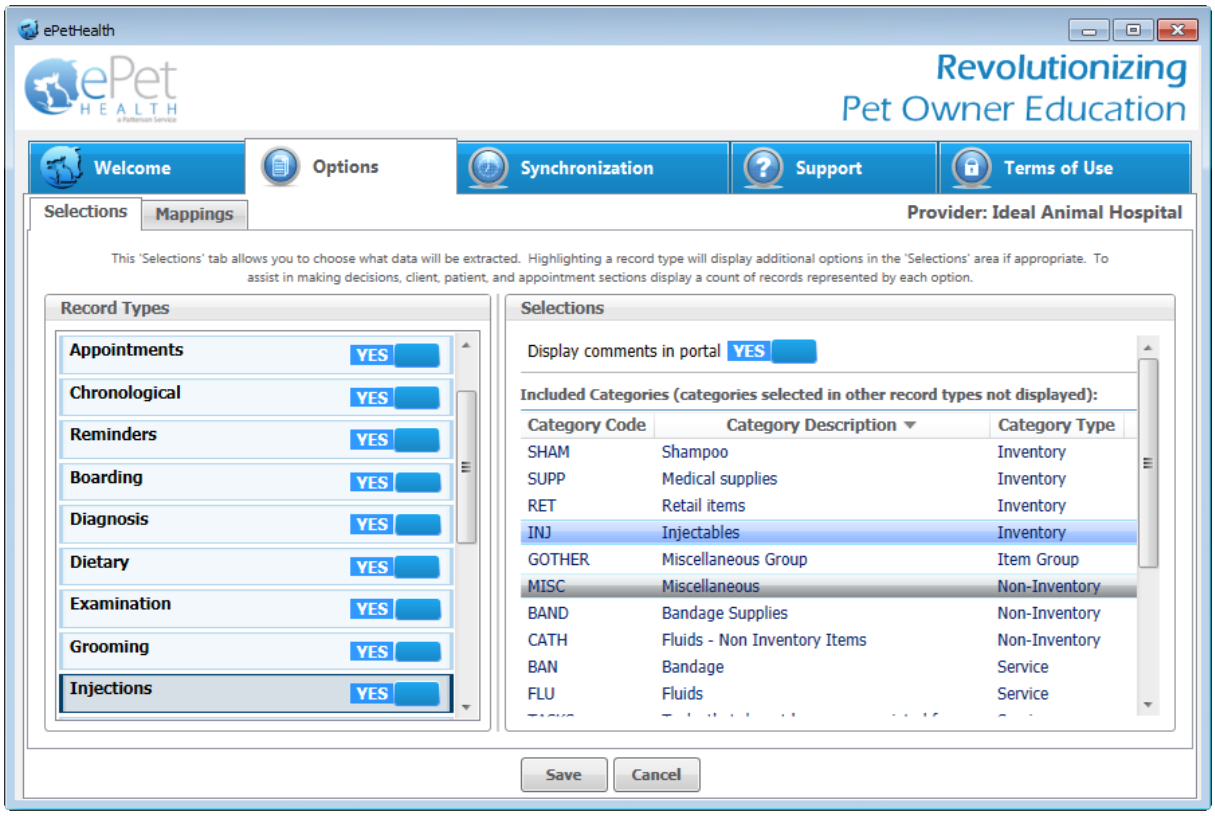
- The Injections Record Type will display any injections the patient may have received. The date, time, description, quantity and notes (comments) are displayed.

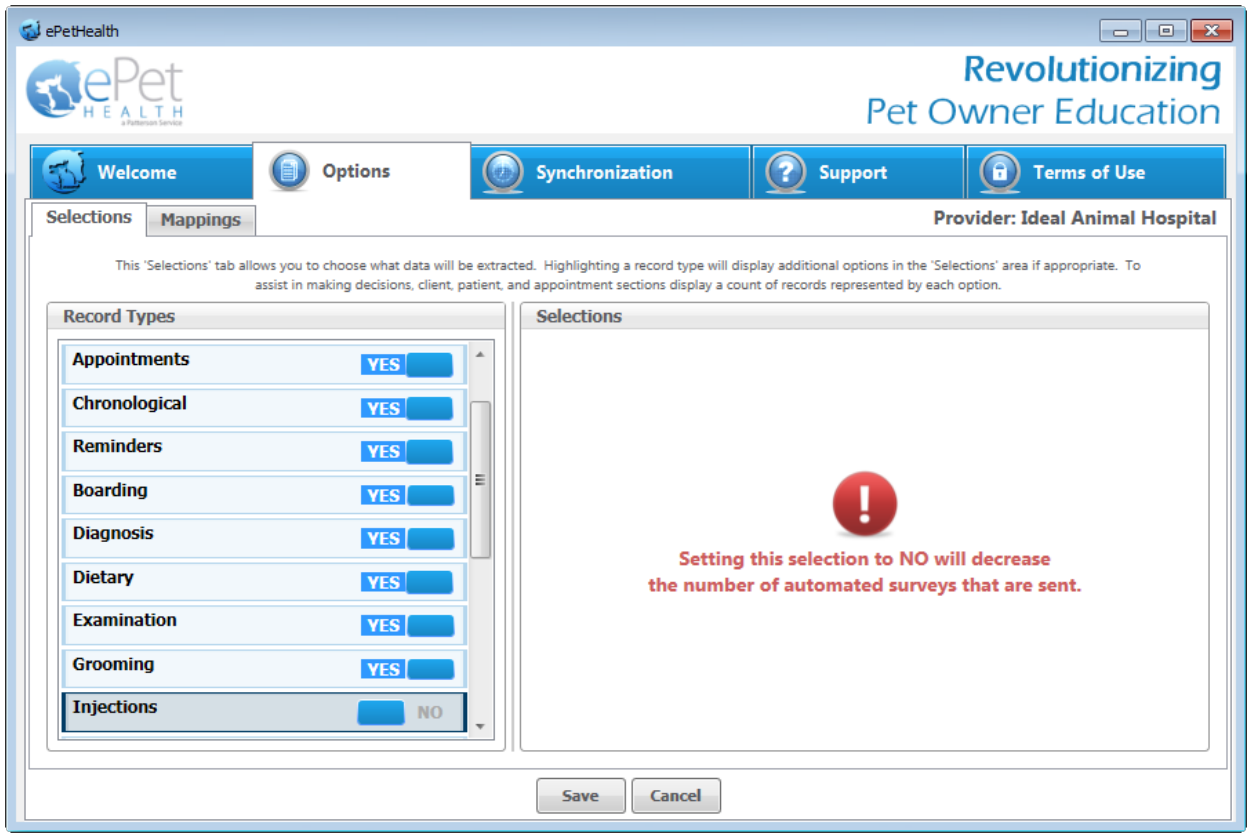
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Injections.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.

- If the Injections Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.

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This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Appointments YES
Chronological YES
Reminders YES
Boarding YES
Diagnosis YES
Dietary YES
Examination YES
Grooming YES
Injections NO
Selections
Setting this selection to NO will decrease the number of automated surveys that are sent.
Save
Cancel

Laboratory Selections

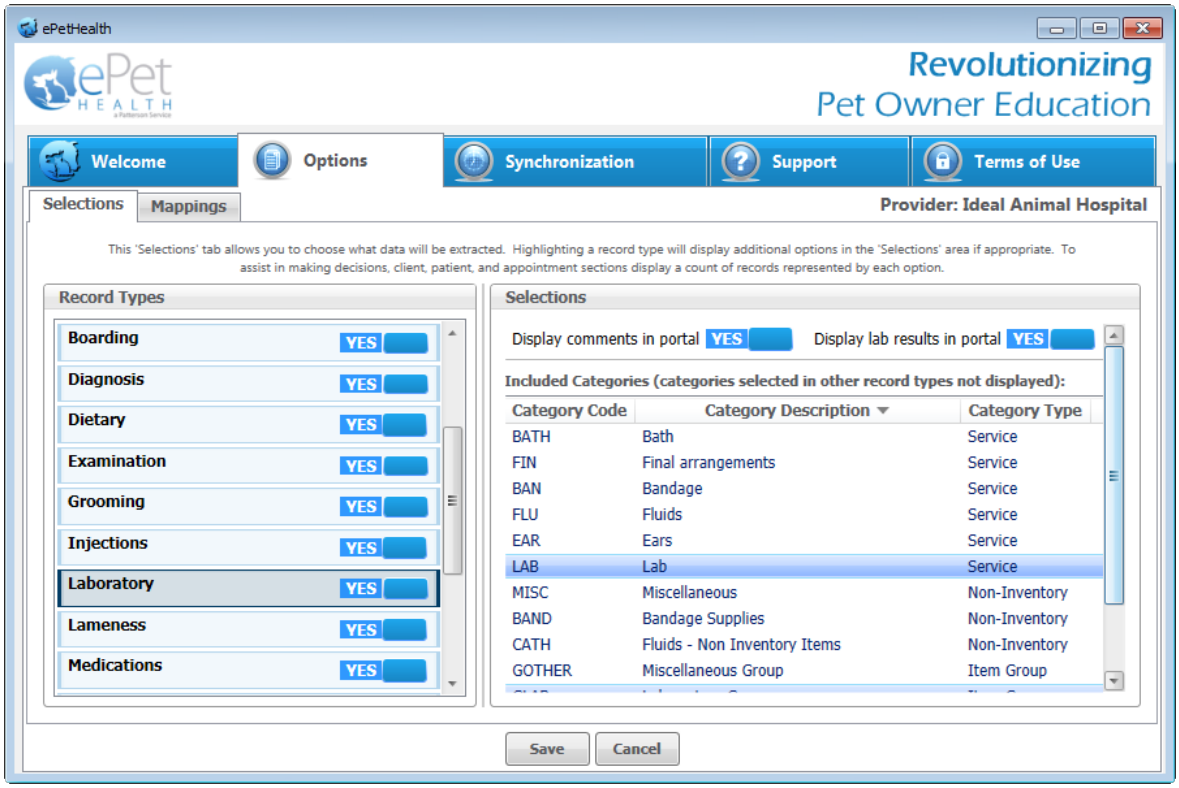
- The Laboratory Record Type will display the Laboratory items that the patient has received. The date given, time given, description/details, quantity and notes (comments) are displayed.

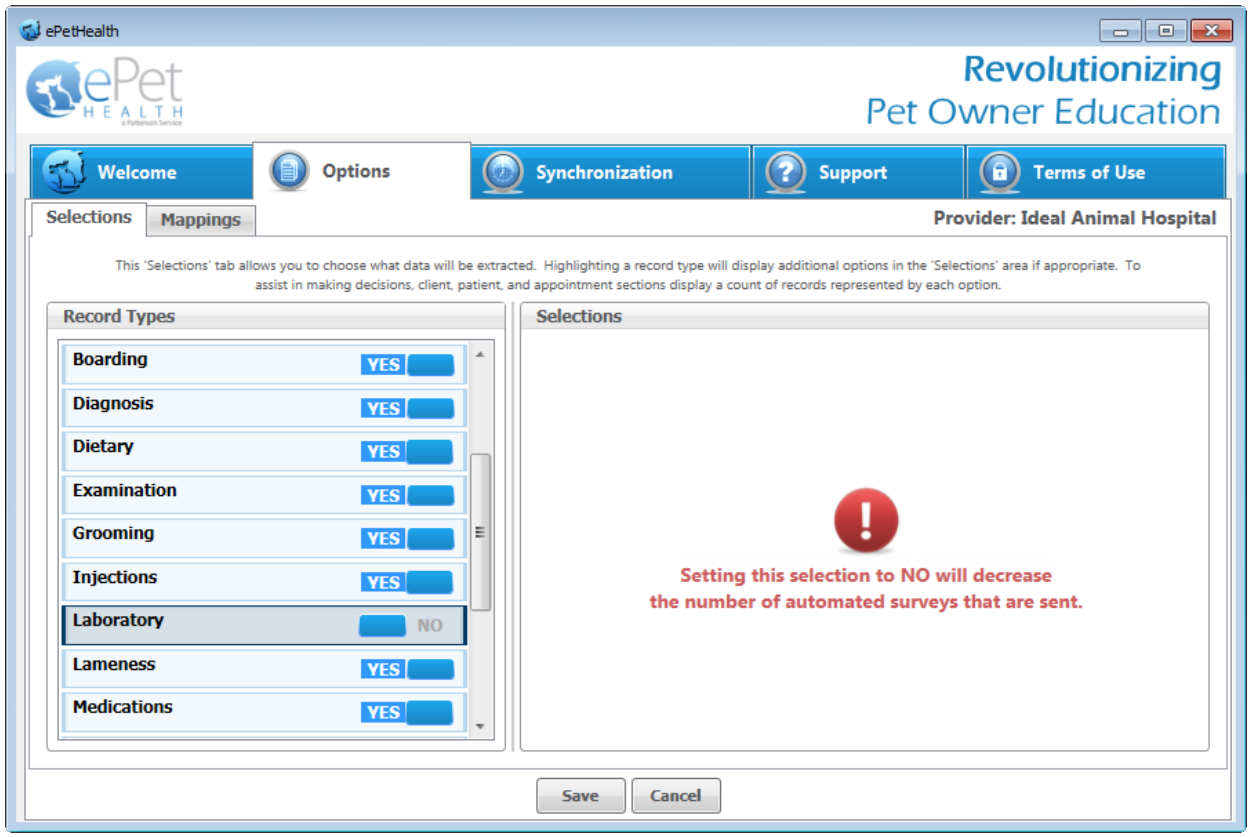
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- Lab Results may also be displayed in the ePetHealth Client Portal by checking the box at the top of the Selections Table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
    - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Laboratory.
    - Selections are not limited to Category Codes that exactly match the Category type.
    - Select as many or as few Category Codes as needed.
    - Any Categories selected in another Record Type will not be displayed.
- If the Laboratory Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.

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This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Boarding YES
Diagnosis YES
Dietary YES
Examination YES
Grooming YES
Injections YES
Laboratory NO
Lameness YES
Medications YES
Selections
Setting this selection to NO will decrease
the number of automated surveys that are sent.
Save
Cancel

Lameness Selections

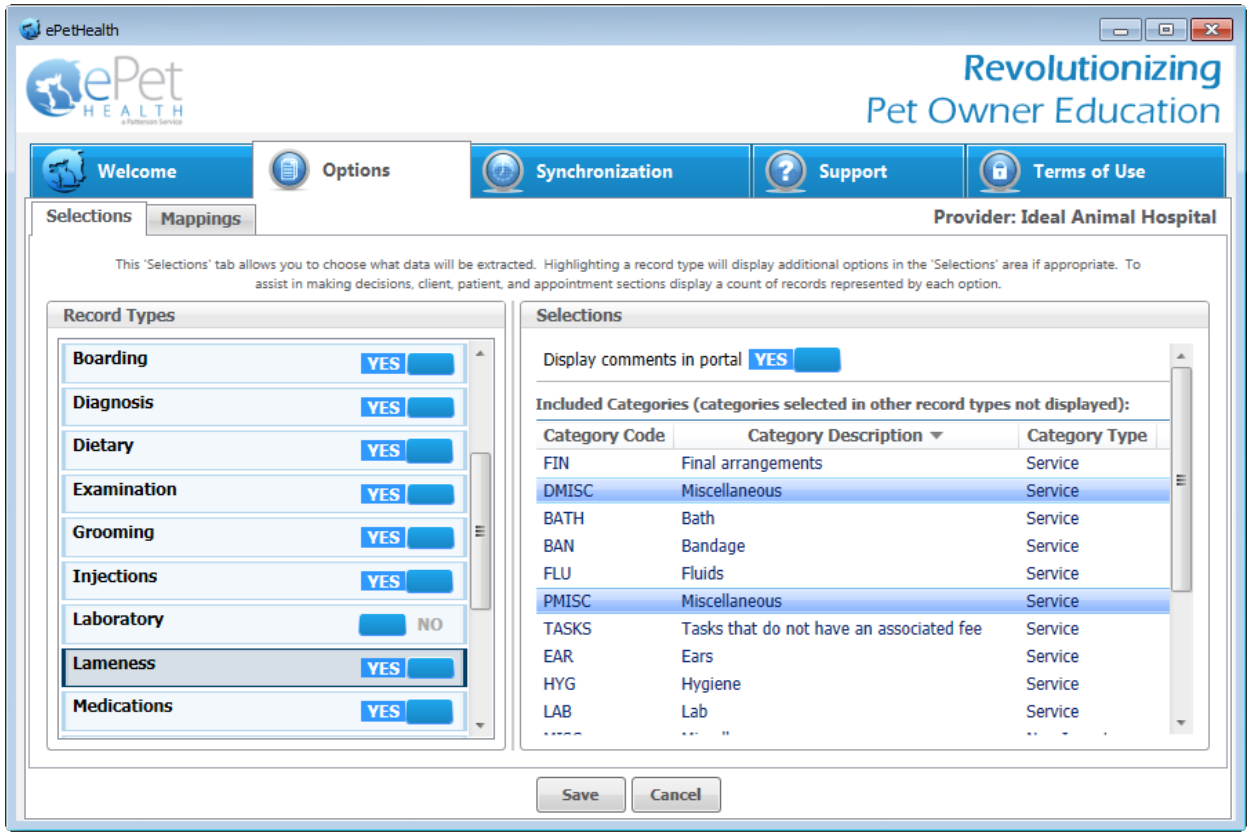
- The Lameness Record Type will display any lameness related items the patient may have received. The date, time, description, quantity and notes (comments) are displayed.

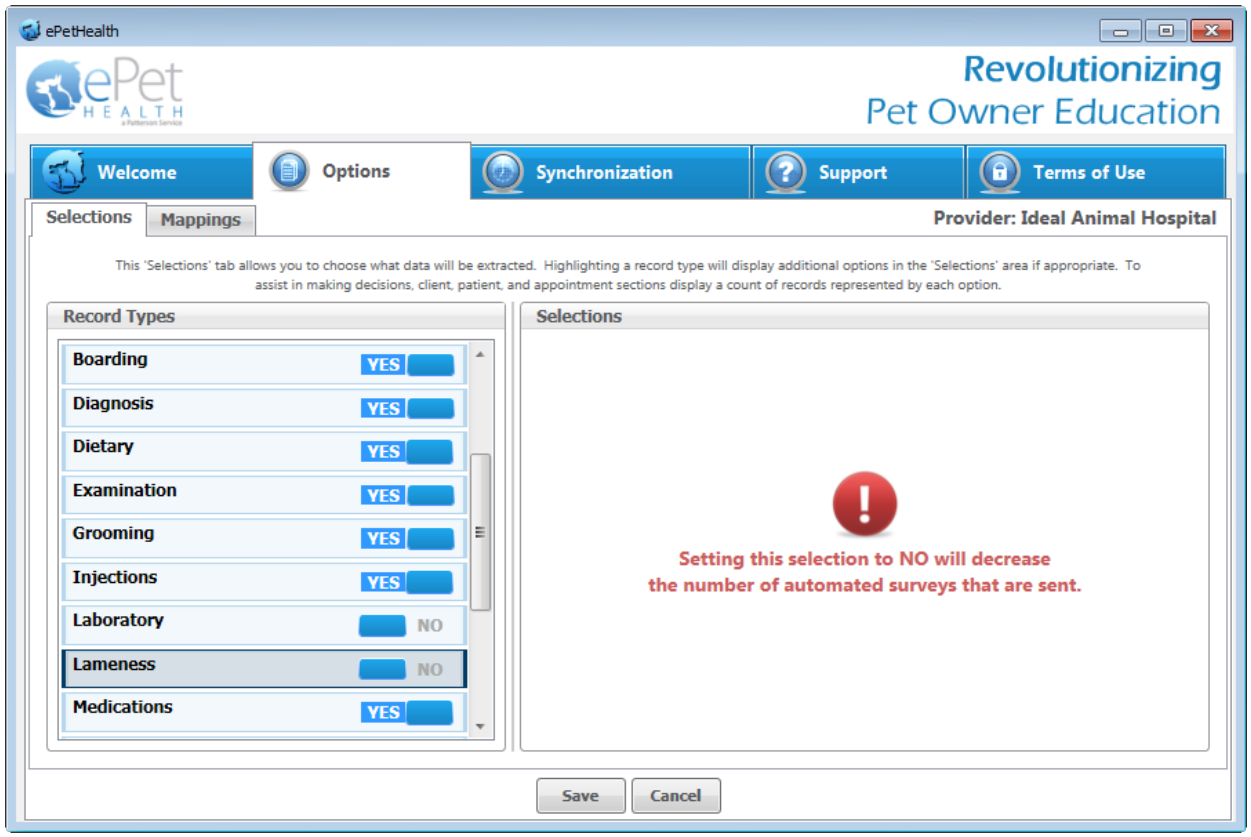
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Lameness.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.

- If the Lameness Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.

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Record Types
Boarding YES
Diagnosis YES
Dietary YES
Examination YES
Grooming YES
Injections YES
Laboratory NO
Lameness NO
Medications YES
Selections
Setting this selection to NO will decrease the number of automated surveys that are sent.
Save
Cancel

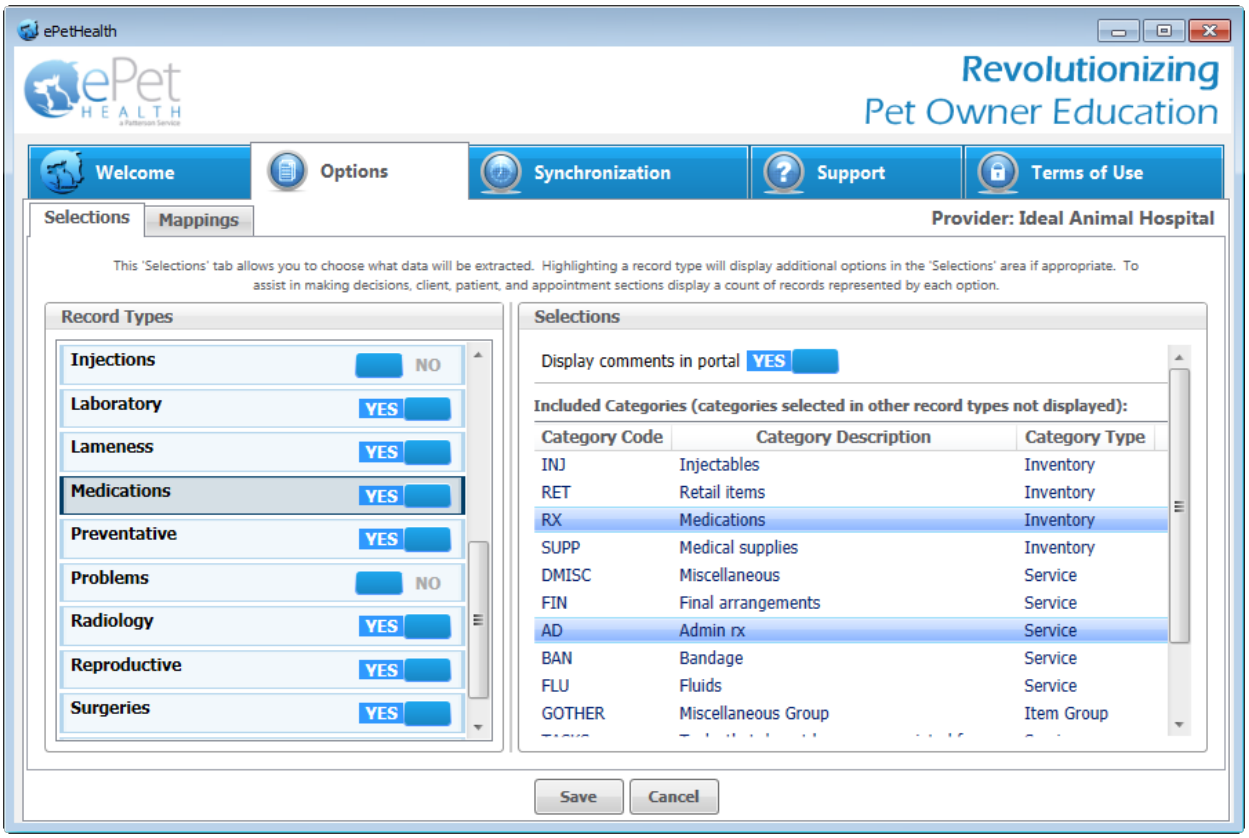
Medications Selections

- The Medications Record Type will display any medications the patient may have received. Date given, time given, description, quantity and notes (comments) are displayed in the ePetHealth Client Portal. The ability to request a refill in the Client Portal may also be enabled based on the Provider Portal settings.

- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Medications.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.



Preventative Selections

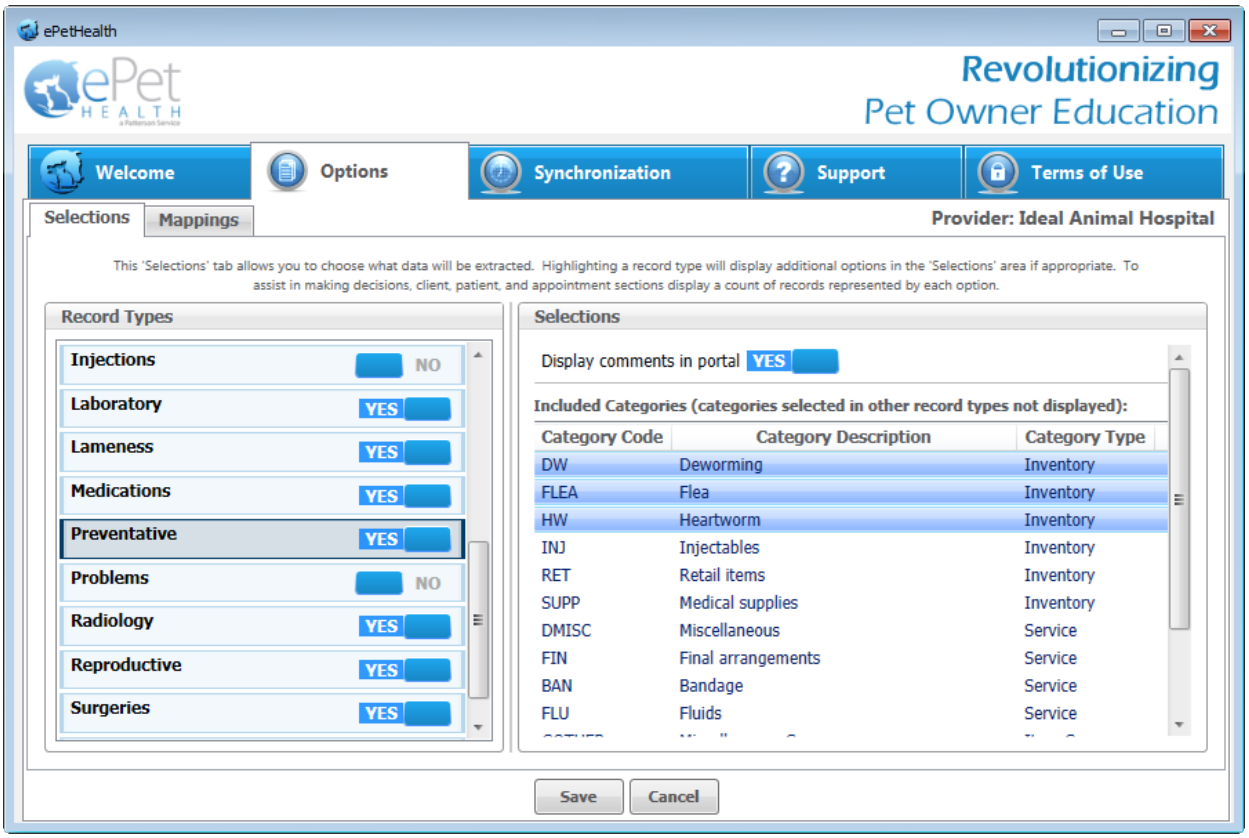
- The Preventative Record Type will display any injections the patient may have received. The date, time, description, quantity and notes (comments) are displayed.

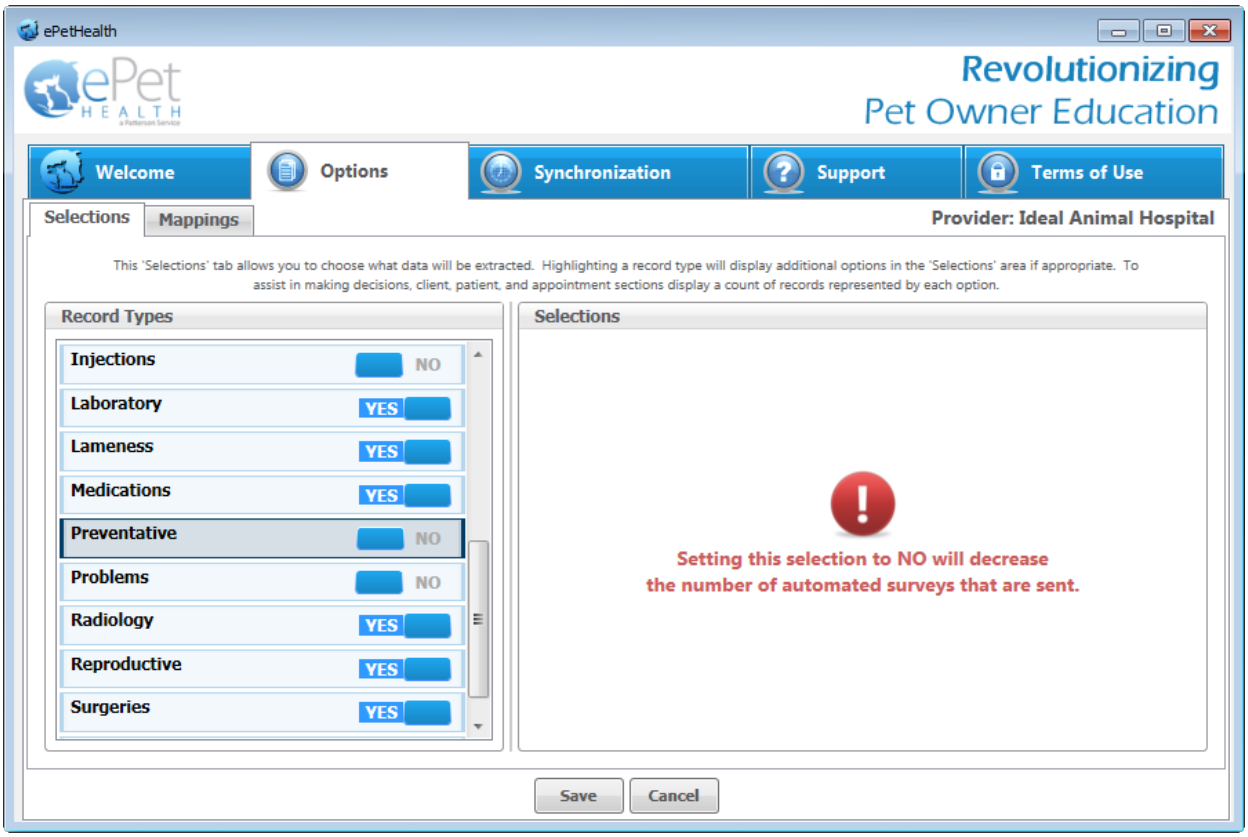
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Preventative.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.

- If the Preventative Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.




ePetHealth
Revolutionizing
Pet Owner Education
Welcome
Options
Synchronization
Support
Terms of Use
Selections
Mappings
Provider: Ideal Animal Hospital
This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Injections NO
Laboratory YES
Lameness YES
Medications YES
Preventative NO
Problems NO
Radiology YES
Reproductive YES
Surgeries YES
Selections
Setting this selection to NO will decrease the number of automated surveys that are sent.
Save
Cancel

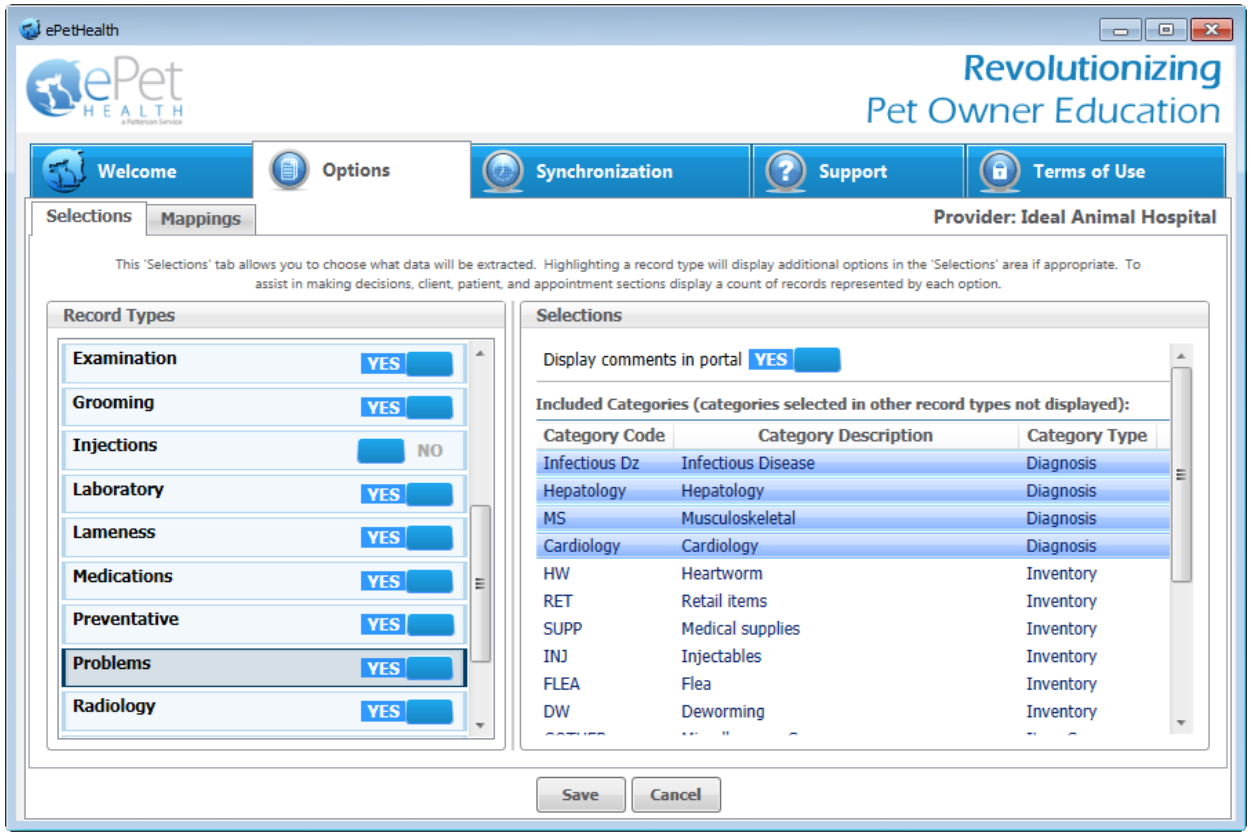
Problems Selections

- The Problems Record Type will display any Problems/Symptoms the patient may have on file in the Practice Management System. Date, time, description, quantity and notes (comments) are displayed in the ePetHealth Client Portal.

- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Problems.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.



Radiology Selections

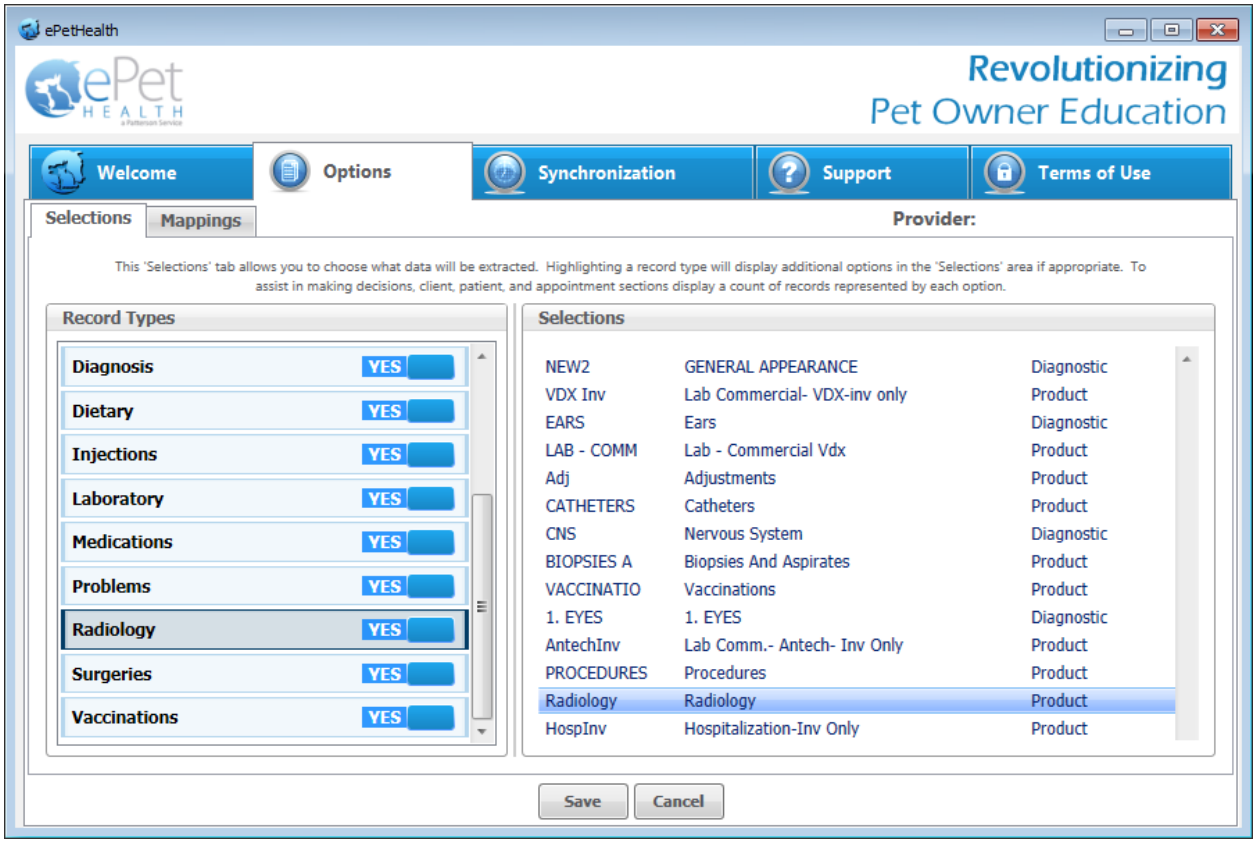
- The Radiology Record Type will display any Radiology items the patient may have received. The date, time, description, quantity and notes (comments) will be displayed in the ePetHealth Client Portal.

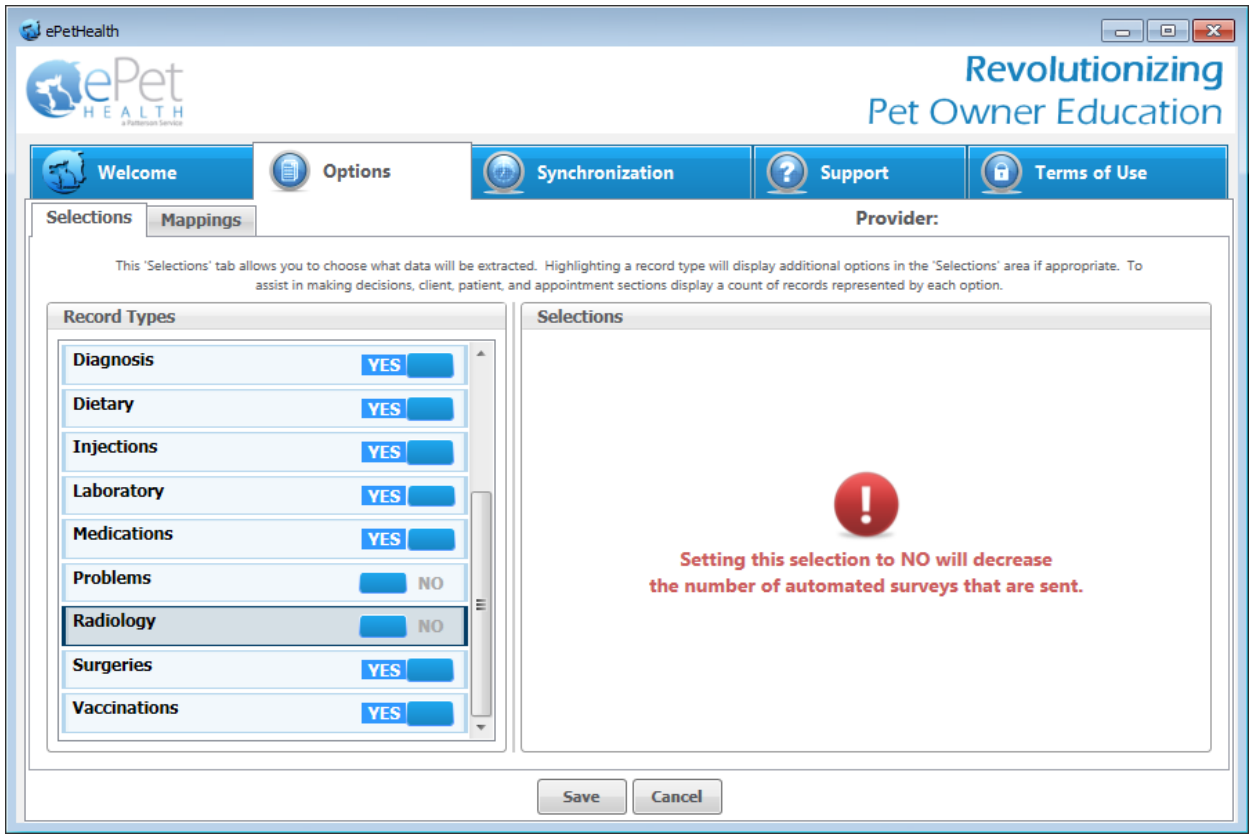
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Radiology.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.

- If the Radiology Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.




ePetHealth
Revolutionizing
Pet Owner Education
Welcome
Options
Synchronization
Support
Terms of Use
Selections
Mappings
Provider:
This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Diagnosis YES
Dietary YES
Injections YES
Laboratory YES
Medications YES
Problems NO
Radiology NO
Surgeries YES
Vaccinations YES
Selections
Setting this selection to NO will decrease the number of automated surveys that are sent.
Save
Cancel

Reproductive Selections

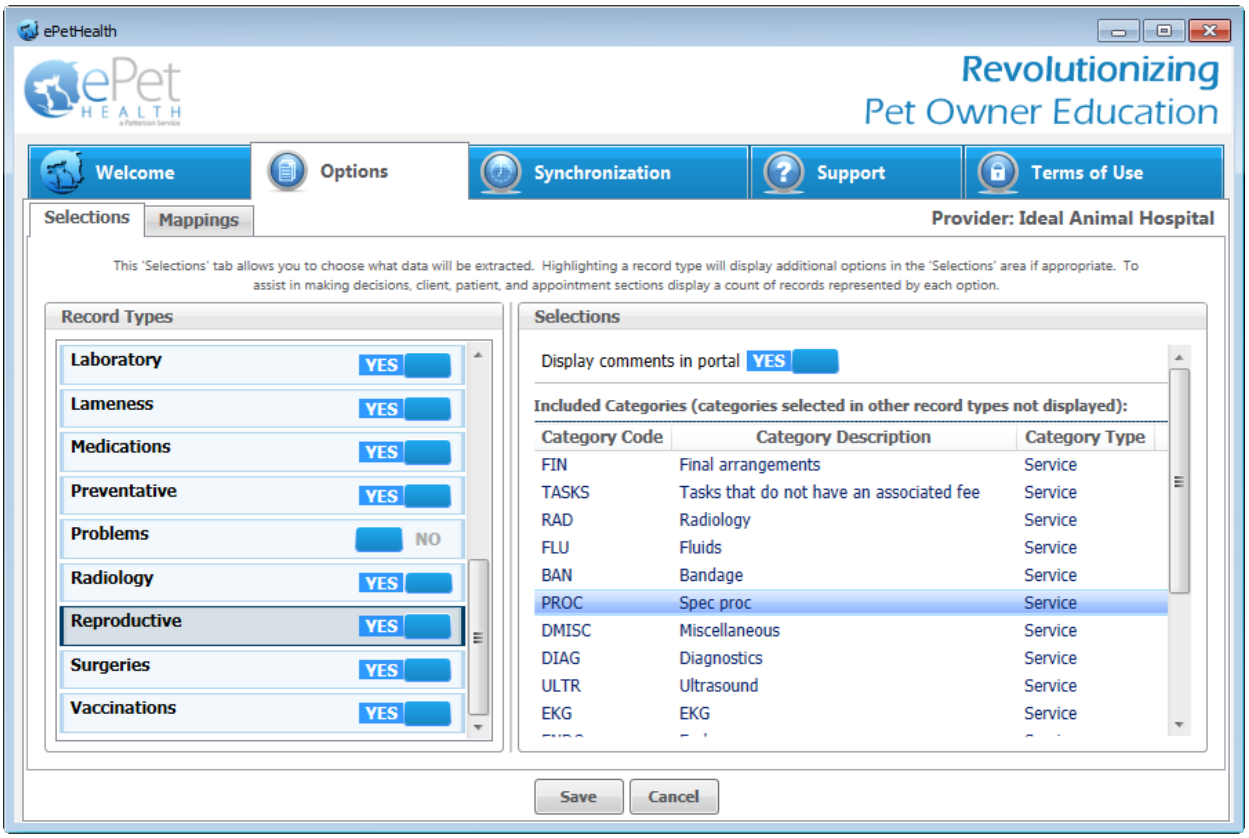
- The Reproductive Record Type will display any reproductive items the patient may have received. The date, time, description, quantity and notes (comments) are displayed.

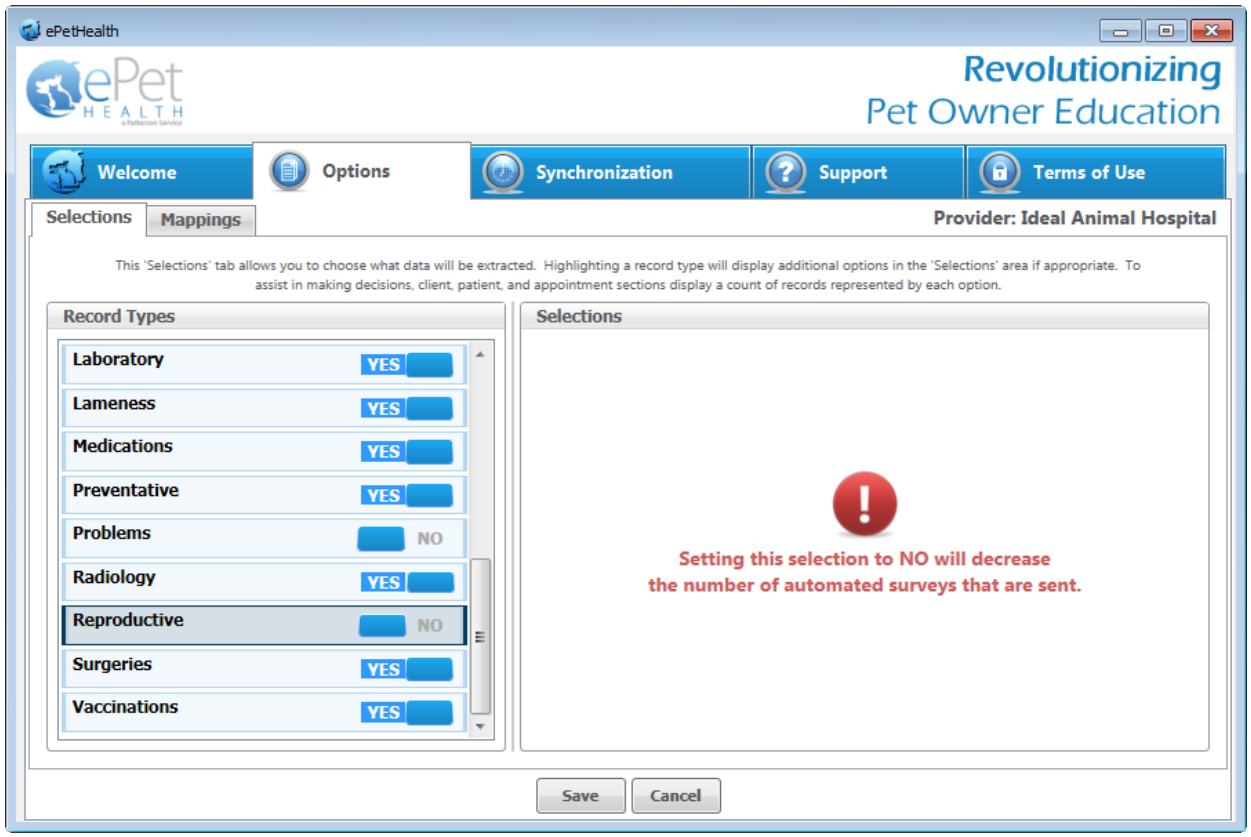
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Reproductive.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.

- If the Reproductive Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.




ePetHealth
Revolutionizing
Pet Owner Education
Welcome
Options
Synchronization
Support
Terms of Use
Selections
Mappings
Provider: Ideal Animal Hospital
This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Laboratory YES
Lameness YES
Medications YES
Preventative YES
Problems NO
Radiology YES
Reproductive NO
Surgeries YES
Vaccinations YES
Selections
Setting this selection to NO will decrease
the number of automated surveys that are sent.
Save
Cancel

Surgeries Selections

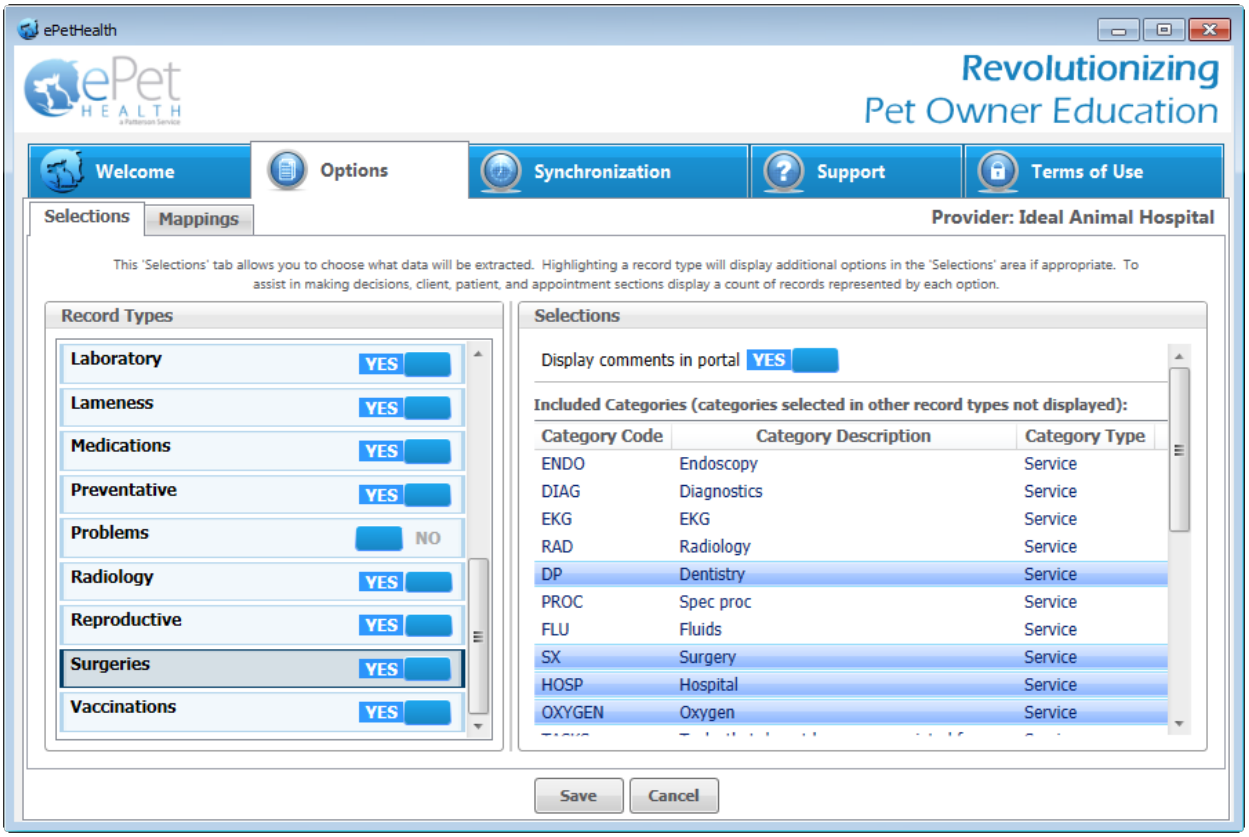
- The Surgeries Record Type will display Surgical items the patient may have on file. The date, time, description, quantity and notes (comments) are displayed in the ePetHealth Client Portal.

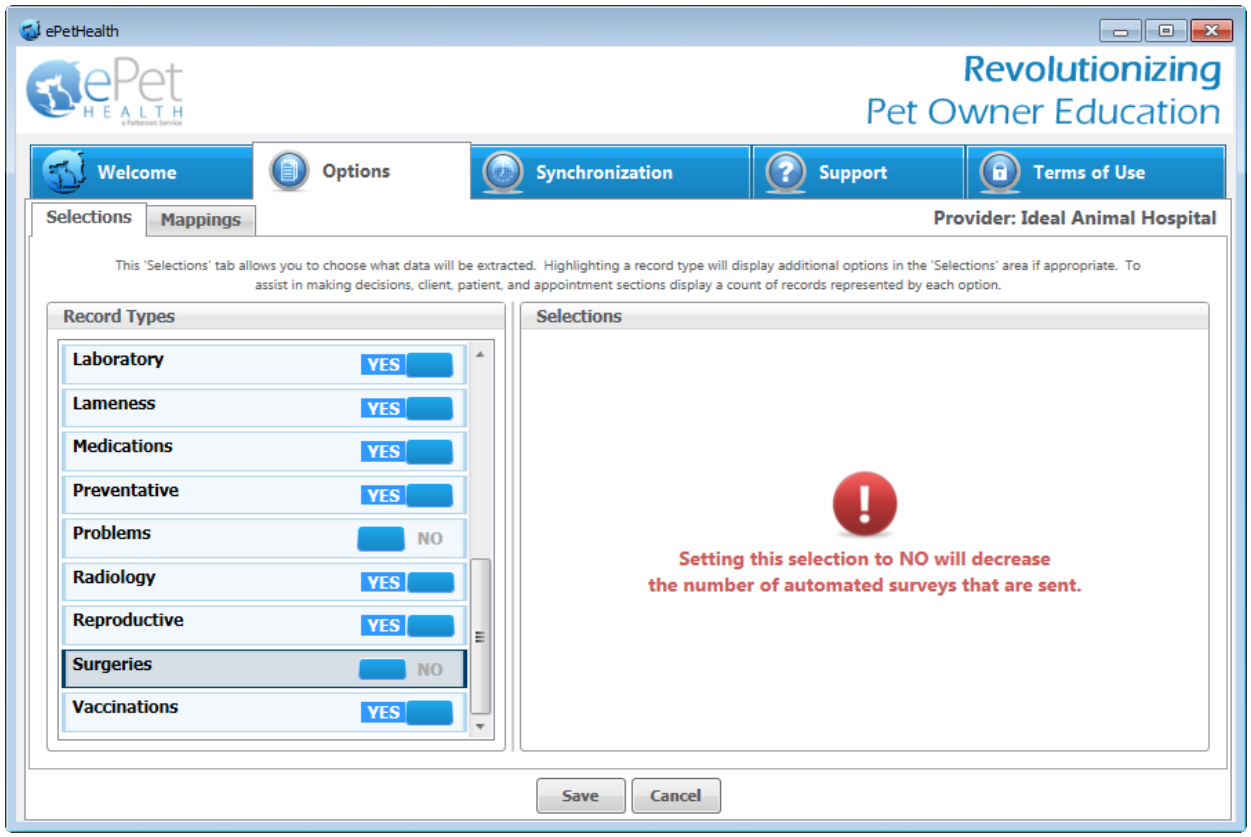
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Surgeries.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.

- If the Surgery Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.




ePetHealth
Revolutionizing
Pet Owner Education
Welcome
Options
Synchronization
Support
Terms of Use
Selections
Mappings
Provider: Ideal Animal Hospital
This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Laboratory YES
Lameness YES
Medications YES
Preventative YES
Problems NO
Radiology YES
Reproductive YES
Surgeries NO
Vaccinations YES
Selections
Setting this selection to NO will decrease
the number of automated surveys that are sent.
Save
Cancel

Vaccinations Selections

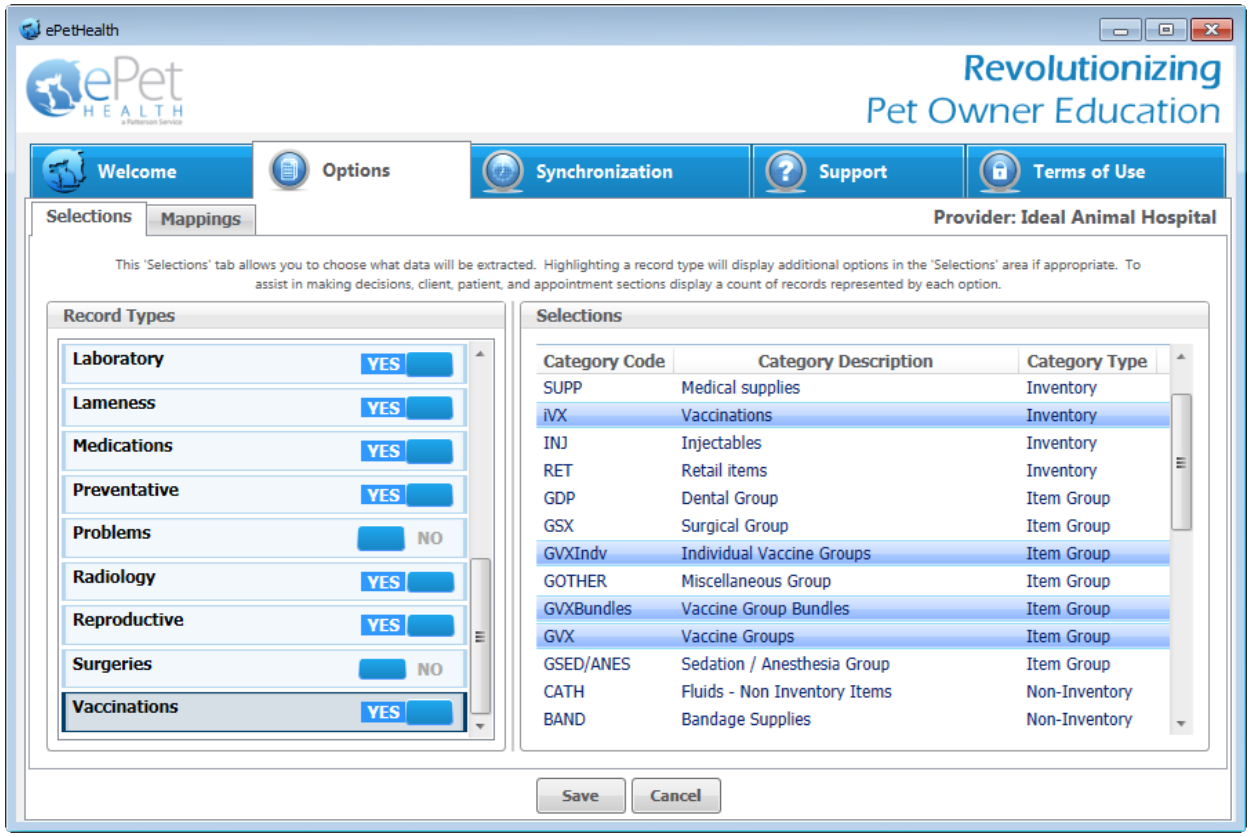
- The Vaccinations Record Type will display the vaccination history of the patient. The date, time, description, quantity and notes (comments) are displayed in the ePetHealth Client Portal.

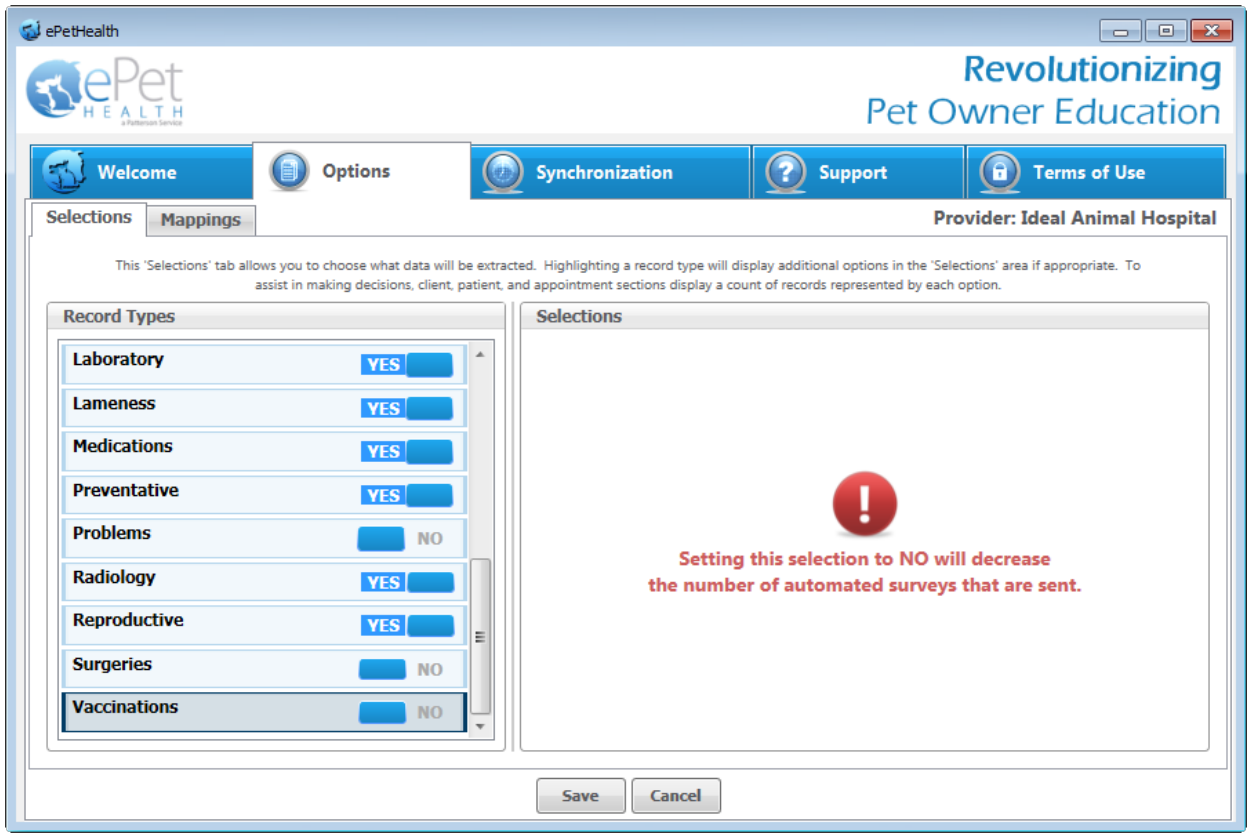
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.

- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- In order for the dashboard to extract the proper information, the appropriate Category Codes must be selected.
  - All Categories from the Practice Management System are displayed; single click on each category to select only those that pertain to Vaccinations.
  - Selections are not limited to Category Codes that exactly match the Category type.
  - Select as many or as few Category Codes as needed.
  - Any Categories selected in another Record Type will not be displayed.

- If the Vaccination Selection is set to No, the amount of automated surveys sent to pet owners will decrease. A notification alert such as the one shown below will appear.

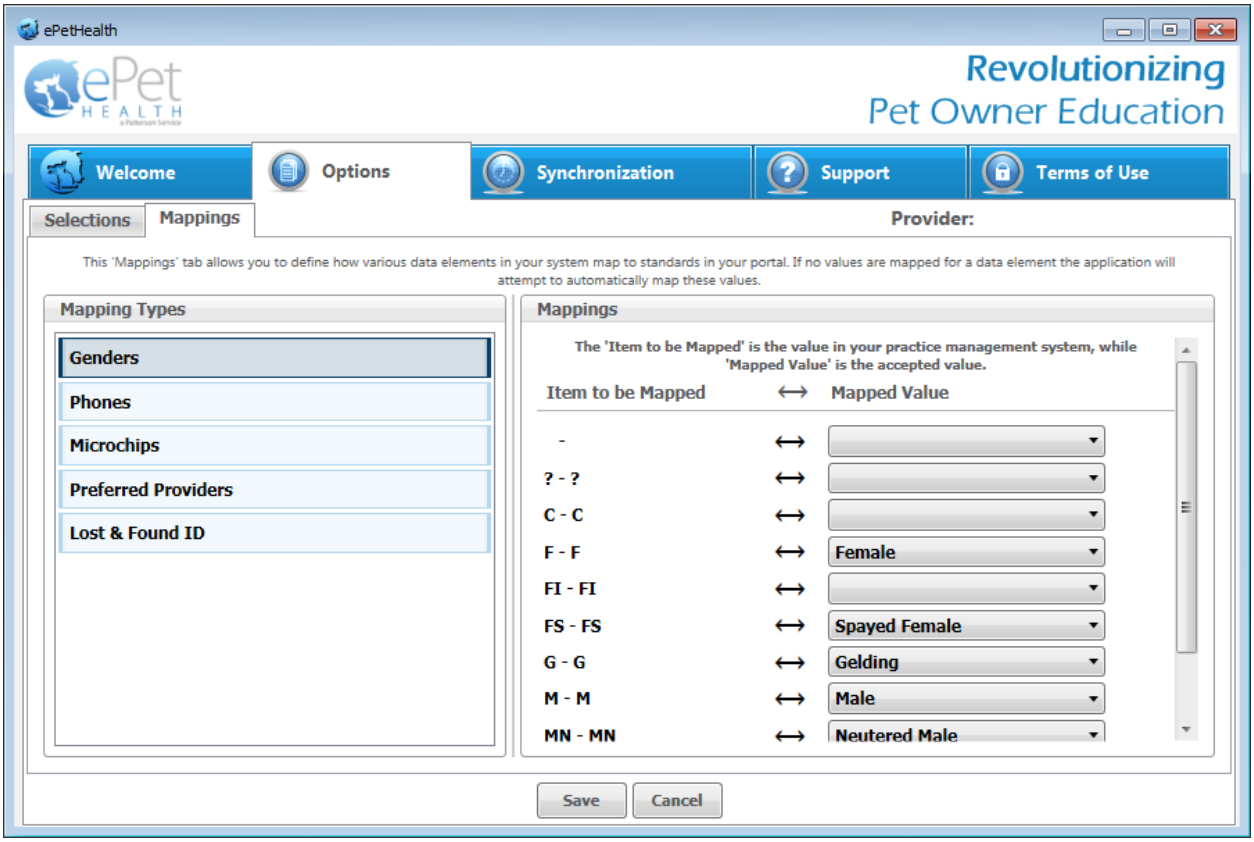



ePetHealth
Revolutionizing
Pet Owner Education
Welcome
Options
Synchronization
Support
Terms of Use
Selections
Mappings
Provider: Ideal Animal Hospital
This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Laboratory YES
Lameness YES
Medications YES
Preventative YES
Problems NO
Radiology YES
Reproductive YES
Surgeries NO
Vaccinations NO
Selections
Setting this selection to NO will decrease
the number of automated surveys that are sent.
Save
Cancel

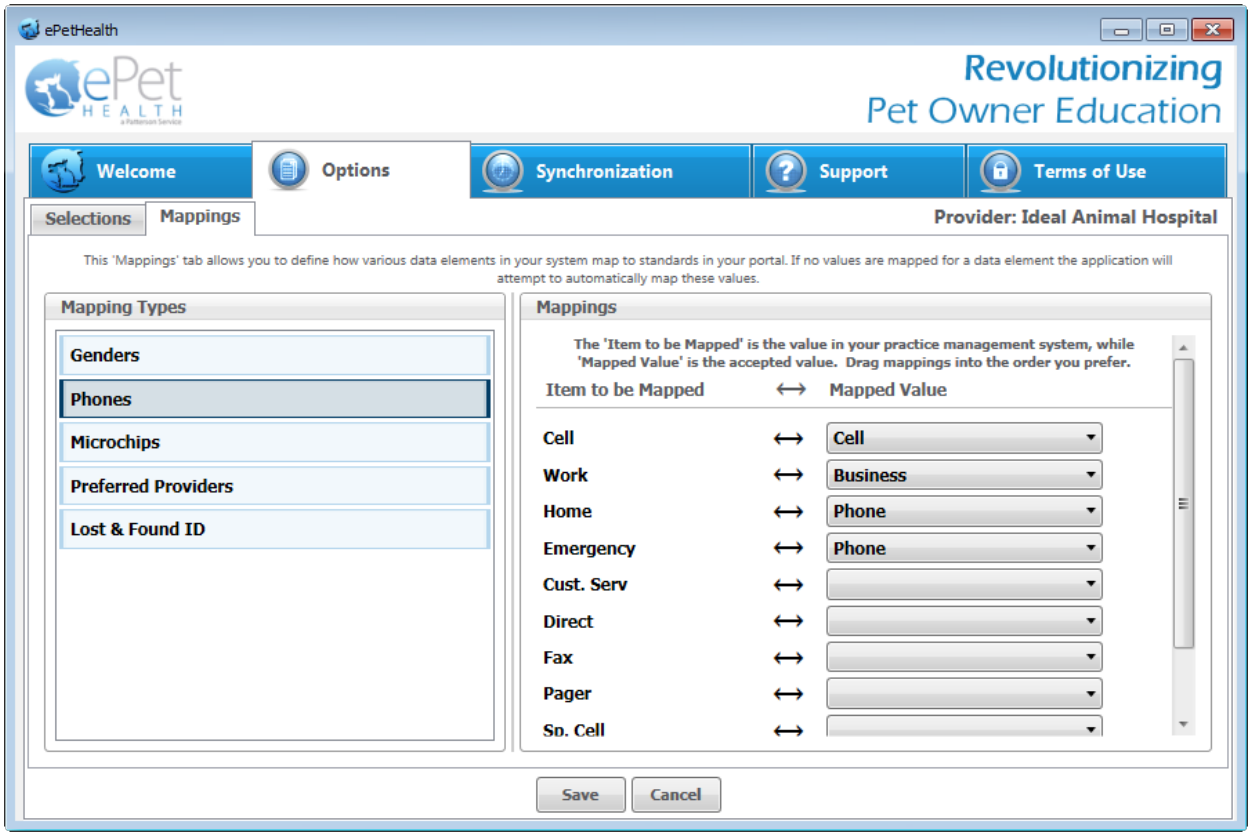
Mappings

- Mappings allow the dashboard to map fields from the Practice Management System to the ePetHealth 'mapped value', which will be shown in the Client Portal.

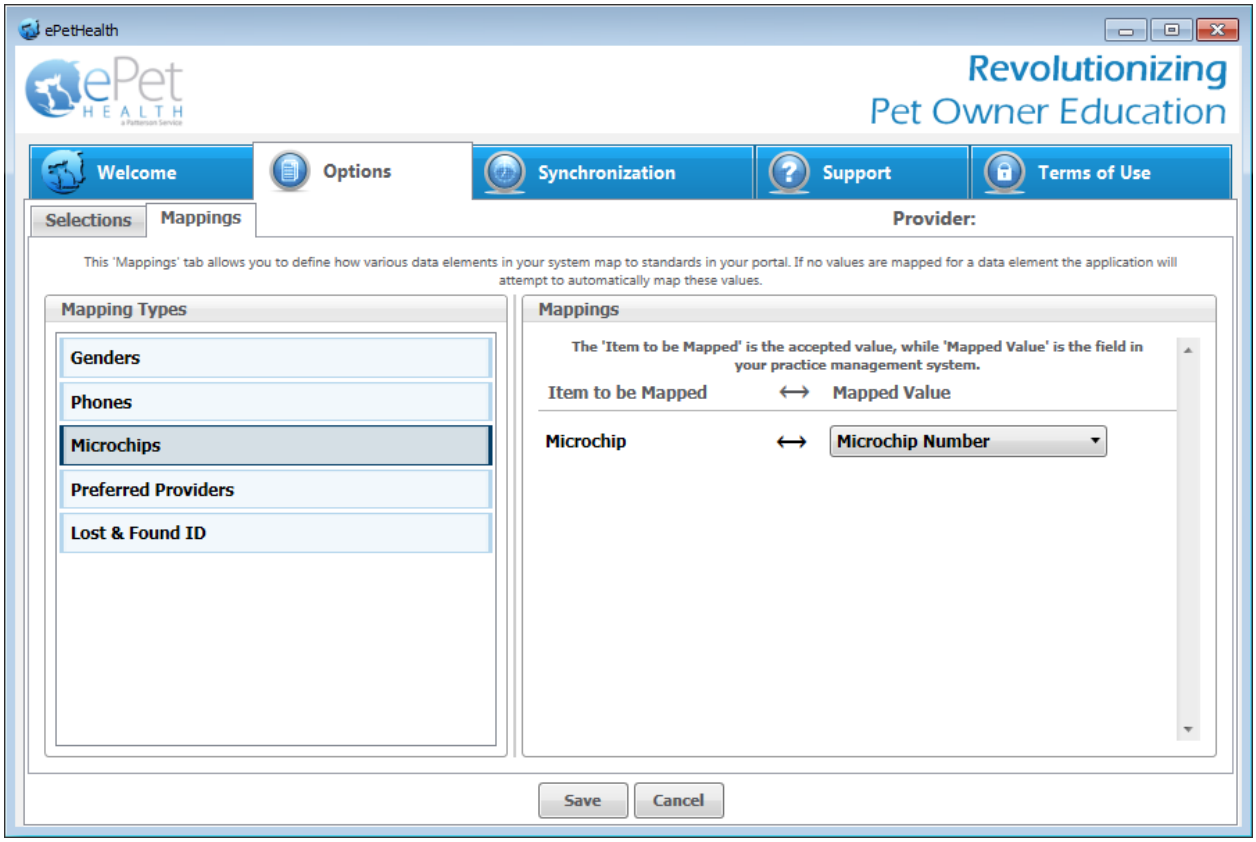
- Genders:
  - The 'Item to be Mapped' is the value in the Practice Management System.
  - The 'Mapped Value' is the accepted value in the ePetHealth portal.
  - Multiple genders can be mapped to the same Mapped Value.
  - Mapped Values can be left blank if the corresponding Item to be Mapped is not to be shown in the Client Portal.
  - For example, the practice would need to designate that the M-Male gender (item to be mapped) in their Practice Management System is the same as Male in the Client Portal (mapped value).



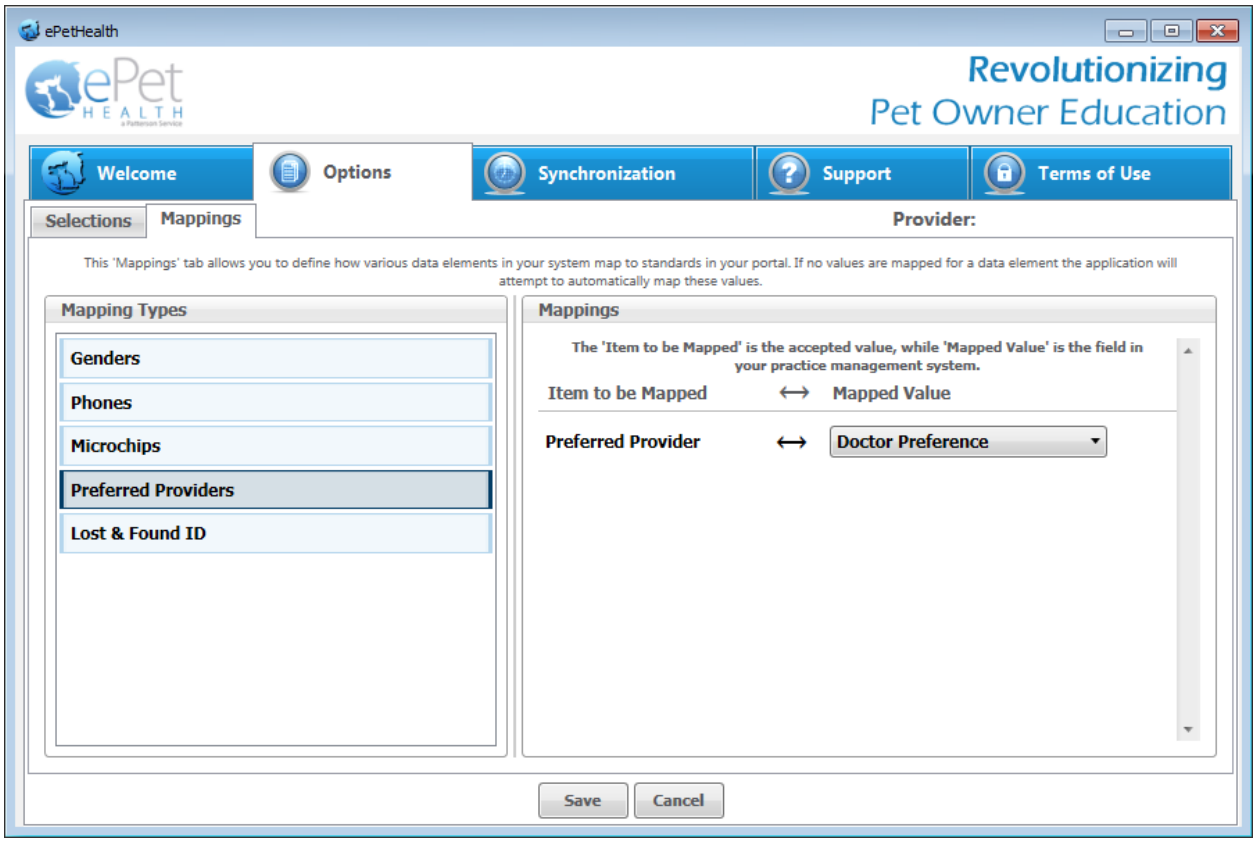
- Phones:
  - The 'Item to be Mapped' is the value in the Practice Management System.
  - The 'Mapped Value' is the accepted value.
  - Multiple phones can be mapped to the same Mapped Value, but only the first phone displayed in the list will be shown for that particular client. For example, Phone and Work (Item to be Mapped) are both mapped to Phone (Mapped Value), but only Phone (Item to be Mapped) will show. Work (Item to be Mapped) will not show.
    - Phone types mapped to the same Mapped Value can be dragged and dropped in the order of priority for the extraction. In the example below, Home and Emergency are both mapped to Phone. Home takes priority over Emergency, so if Client A has both Home and Emergency in the Practice Management System, Home will be mapped to Phone in the extraction.
  - Mapped Values can be left blank if the corresponding Item to be Mapped is not to be shown in the Client Portal.
  - For example, the practice would need to designate that the Work (Item to be Mapped) in their Practice Management System is the same as Business in the Client Portal (Mapped Value).



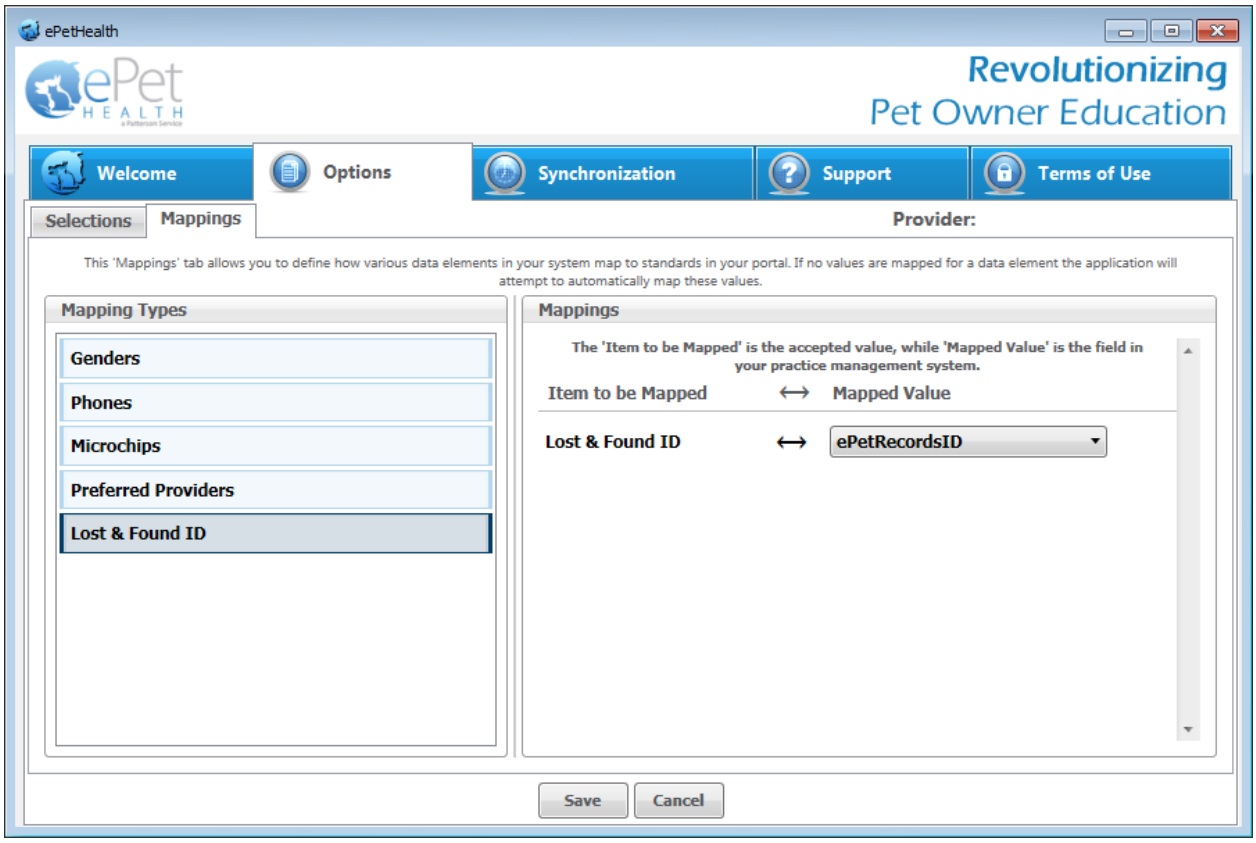
- Microchips:
  - The 'Item to be Mapped' is the accepted value in the ePetHealth portal.
  - The 'Mapped Value' is the value in the Practice Management System.
  - Mapped Values can be left blank if the corresponding Item to be Mapped is not to be shown in the Client Portal.
  - By default, no field is mapped for Microchips for ClienTrax as ID1 and ID2 do not definitively indicate either of these uses. These mappings are manual for all new installations.
  - For example, the practice would need to designate that the Microchip (Item to be Mapped) that will display in the Client Portal is the same as Microchip Number (Mapped Value) in their Practice Management System.



- Preferred Provider:
  - The 'Item to be Mapped' is the accepted value in the ePetHealth portal.
  - The 'Mapped Value' is the value in the Practice Management System.
  - Mapped Values can be left blank if the corresponding Item to be Mapped is not to be shown in the Client Portal.
  - This mapping allows the dashboard to pull the correct Practice Management field for the Preferred Provider of the client in the ePetHealth Client Portal.
  - For example, the practice would need to designate that the Preferred Provider (Item to be Mapped) that will display in the Client Portal is the same as Doctor Preference (Mapped Value) in their Practice Management System.



- Lost & Found IDs:
  - The 'Item to be Mapped' is the accepted value in the ePetHealth portal.
  - The 'Mapped Value' is the value in the Practice Management System.
  - Mapped Values can be left blank if the corresponding Item to be Mapped is not to be shown in the Client Portal.
  - By default, no field is mapped for Lost & Found ID for ClienTrax as ID1 and ID2 do not definitively indicate either of these uses. These mappings are manual for all new installations.
  - This mapping allows the dashboard to pull the correct Practice Management System field for the Lost & Found ID field in the ePetHealth Client Portal. This field is designed to work with ePetHealth's Lost & Found ID tags, which are searchable through our website: http://www.epethealth.com



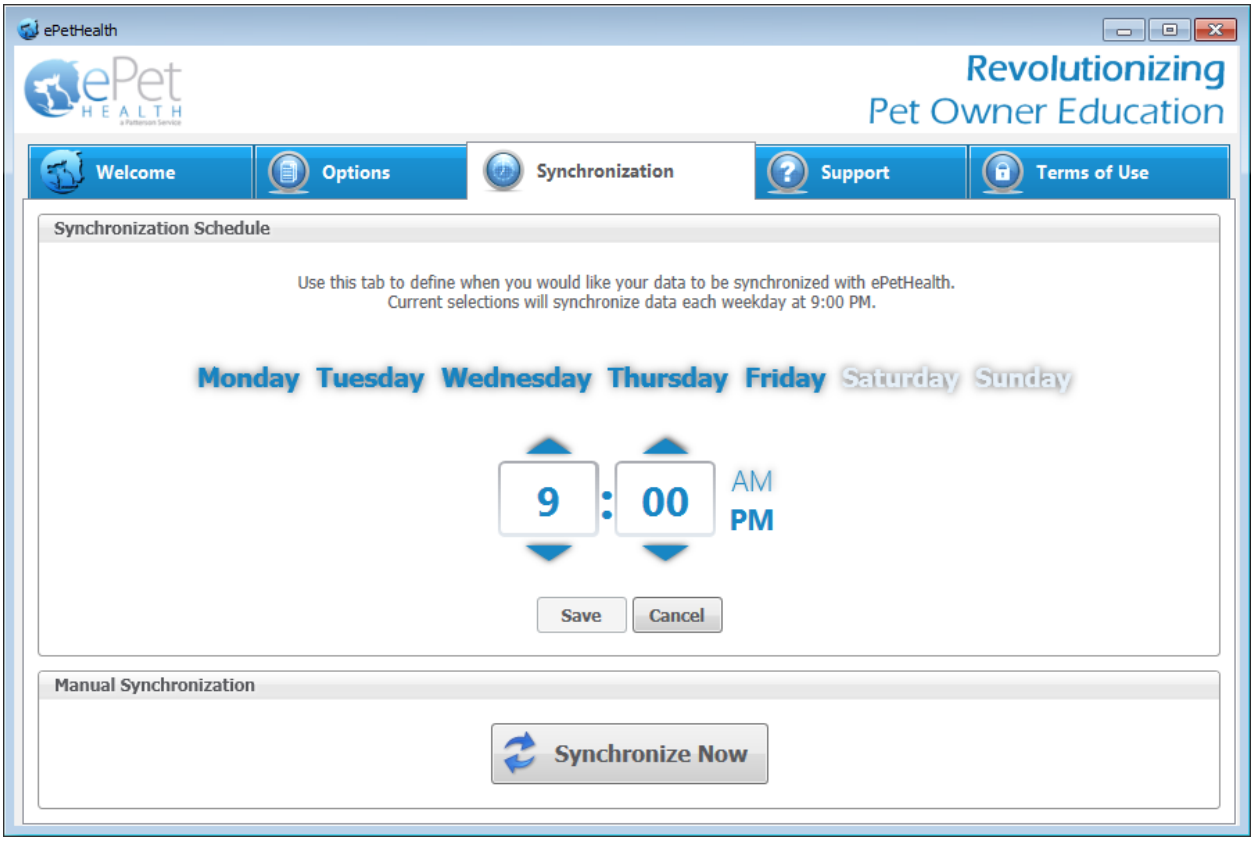
Synchronization

Synchronizations will pull data from the past six months, one year, two years or three years, depending on what option is selected in the Extraction Time Frame menu under the Options tab.

NOTICE: The Server must remain **turned ON** during the selected days/time to allow your practice's data to upload to ePetHealth. If the dashboard is installed on a workstation, both the workstation and the server computer must remain on.

ePetHealth recommends that the synchronization schedule be set to sync immediately after the practice closes each day, on days that the practice is open.

It is also possible to run a manual synchronization from this screen.

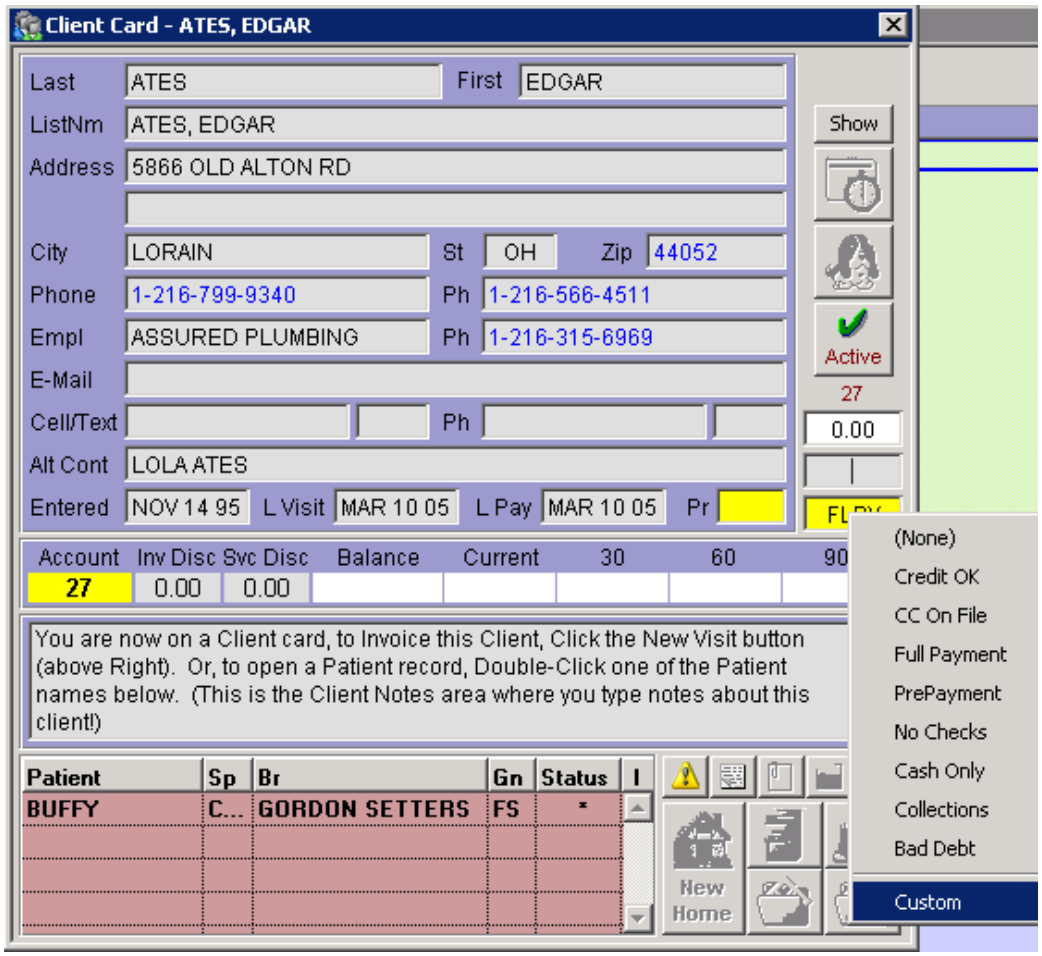


ClienTrax Filter Data

Client Type

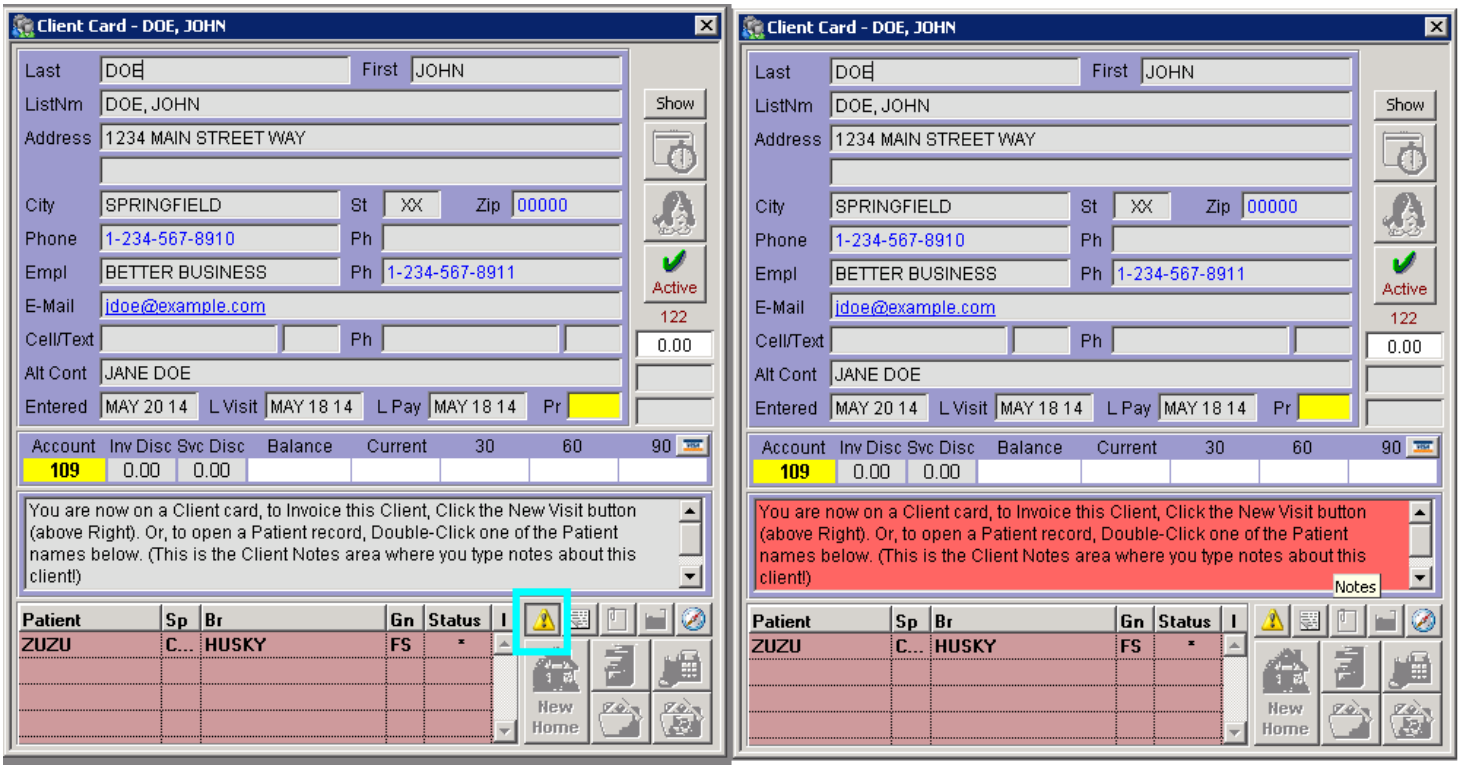
ClienTrax has nine default client types: none, Credit OK, CC on File, Full Payment, PrePayment, No Checks, Cash Only, Collections, and Bad Debt.

Clicking custom will allow free form entry. Any free-form client types will also be displayed on the Client filter screen within the ePetHealth dashboard.



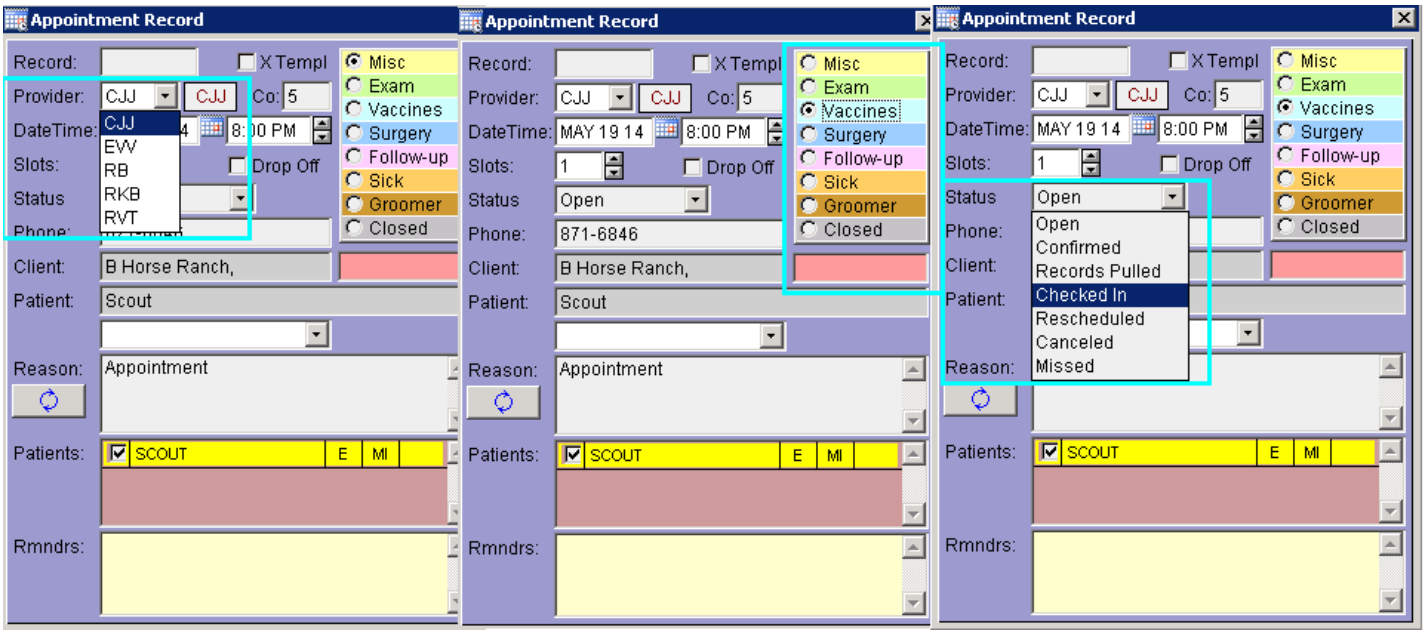
Client Alert Colors

ClienTrax also allows clients to be given an alert color. Clicking the alert box on a Client Card will cycle through these colors. These colors are also exclusion options on the client filter within the ePetHealth dashboard.



Appointment Filtering

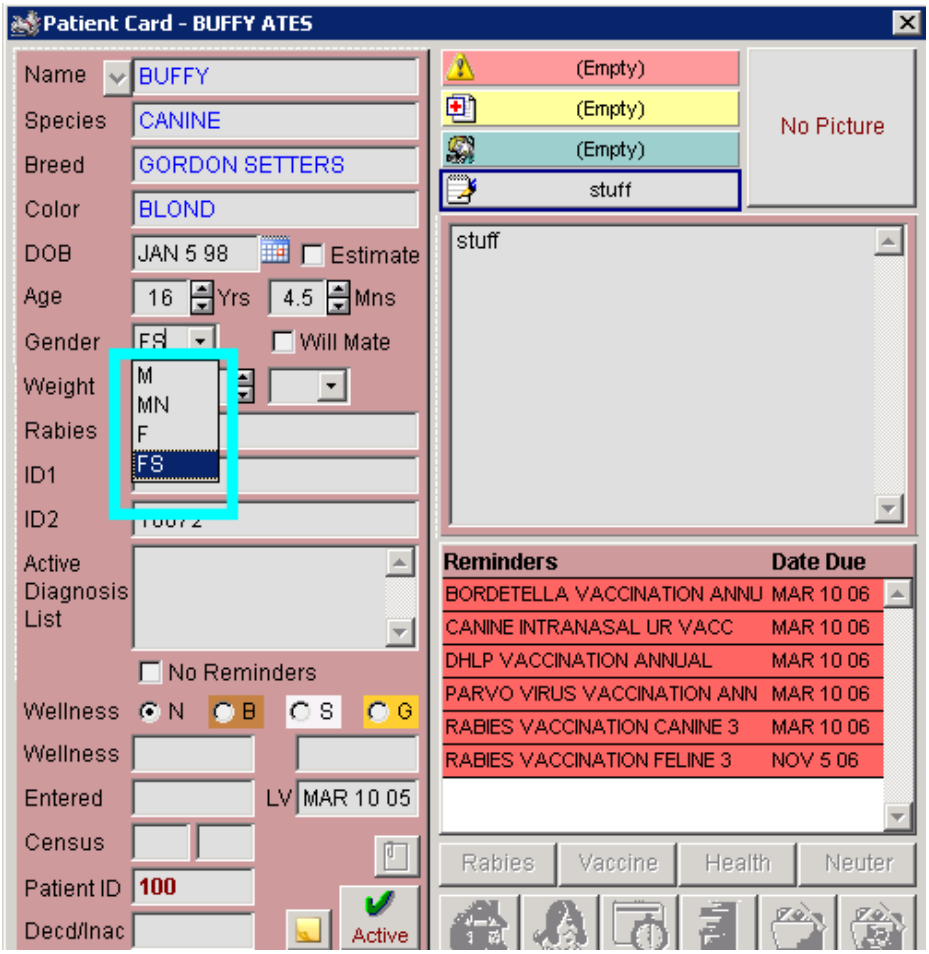
ClienTrax has the ability to set a Provider, Type, and Status for appointments from the Appointment Record. Note that appointment reasons are free-form and are therefore not included as a filtering option.



ClienTrax Mapping Data

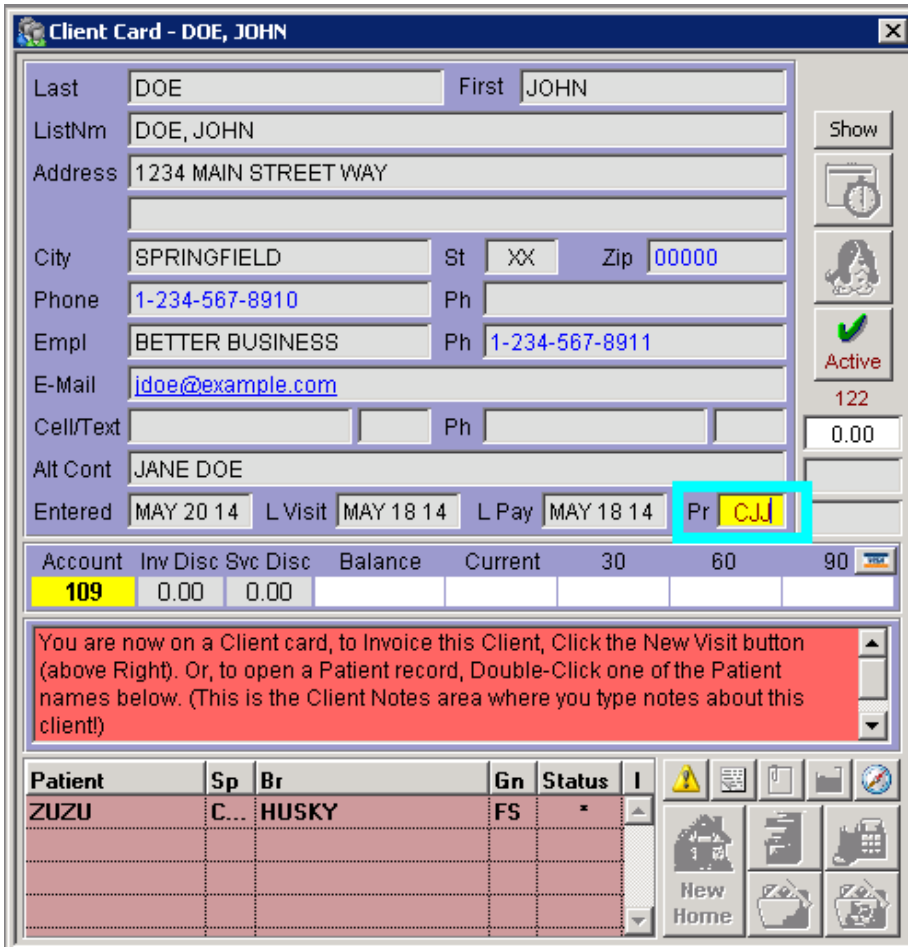
Patient Gender

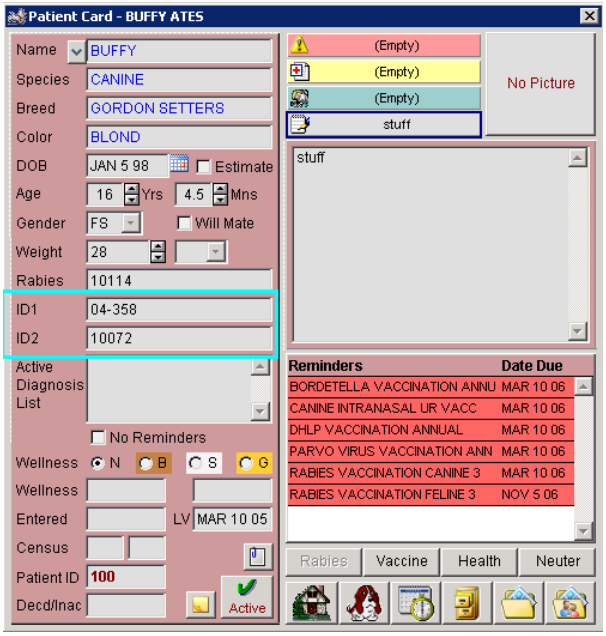
In ClienTrax, there are four default genders (M, MN, F, and FS), but the field is free form. The contents of this field in the patient card can be deleted or manually entered, so additional items will appear in the data and the ePetHealth dashboard gender mapping screen.



Preferred Provider

Preferred providers are set on the Client Card as Standard Provider.



Microchip and Lost & Found ID

ClienTrax does not have a field designated to Microchips or Lost & Found IDs, but practices will likely enter these in the ID1 and ID2 fields on the Patient Card. These options appear as PETID1 and PETID2 in the ePetHealth dashboard mapping area.