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# 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.

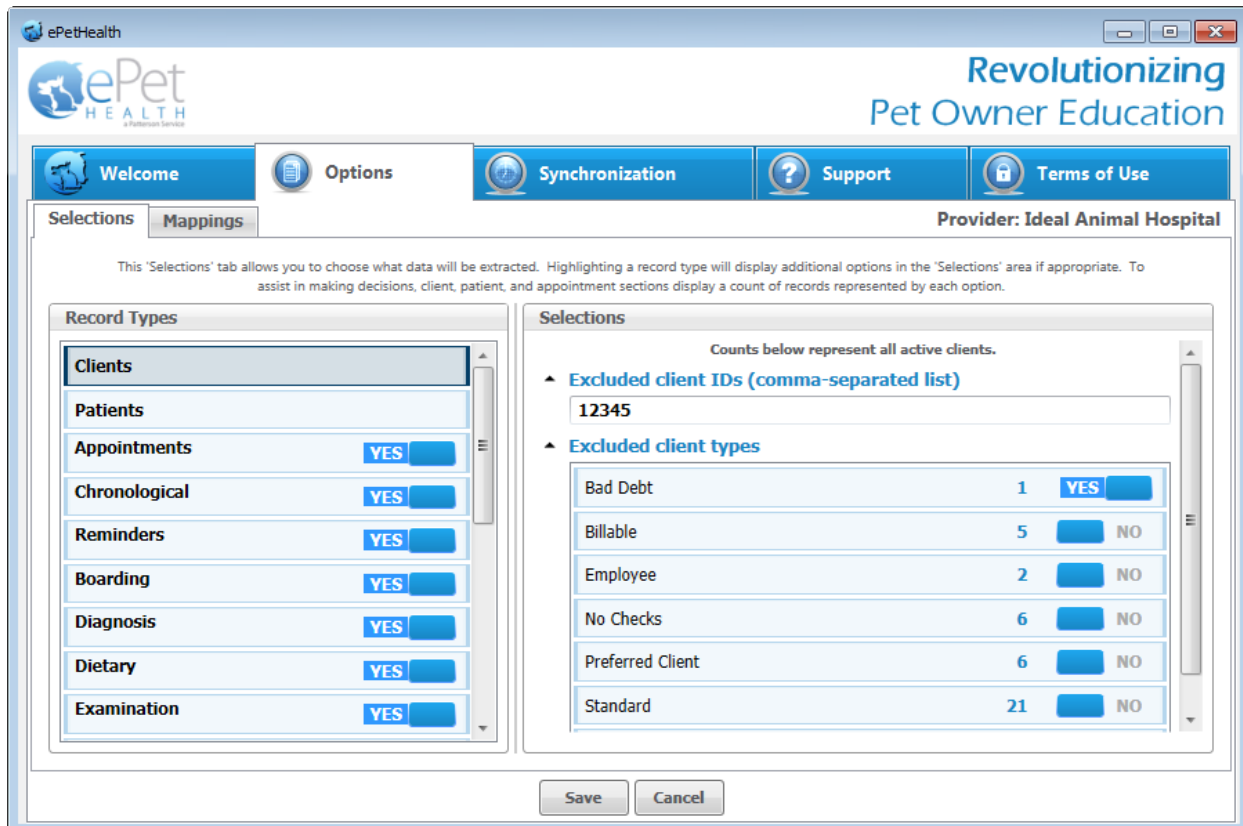
Each Record Type can be easily customized to match the Categories of the Practice Management System. All information shown in the dashboard is pulled directly from the Practice Management System.

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 ClientTrax, there are two types of client types: Alert Color and Client Type. For more information on how this is handled, see ClientTrax 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.



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 | <input checked="" type="checkbox"/> |
| Chronological | YES | <input checked="" type="checkbox"/> |
| Reminders     | YES | <input checked="" type="checkbox"/> |
| Boarding      | YES | <input checked="" type="checkbox"/> |
| Diagnosis     | YES | <input checked="" type="checkbox"/> |
| Dietary       | YES | <input checked="" type="checkbox"/> |
| Examination   | YES | <input checked="" type="checkbox"/> |

| Selections                                   |    |   |
|--|----|---|
| Counts below represent all active clients.   |    |   |
| ▲ Excluded client IDs (comma-separated list) |    |   |
| 12345  |    |   |
| ▲ Excluded client types                      |    |   |
| Bad Debt                                     | 1  | YES <input checked="" type="checkbox"/> |
| Billable                                     | 5  | NO <input type="checkbox"/>             |
| Employee                                     | 2  | NO <input type="checkbox"/>             |
| No Checks                                    | 6  | NO <input type="checkbox"/>             |
| Preferred Client                             | 6  | NO <input type="checkbox"/>             |
| Standard                                     | 21 | NO <input type="checkbox"/>             |

Save Cancel

## 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.



**Record Types**

|                 |     |
|-----------------|-----|
| Clients         |     |
| <b>Patients</b> |     |
| Appointments    | YES |
| Chronological   | YES |
| Reminders       | YES |
| Boarding        | YES |
| Diagnosis       | YES |
| Dietary         | YES |
| Examination     | YES |

**Selections**

Counts below represent all active, non-deceased patients.

| Excluded patient species |     |     |
|--------------------------|-----|-----|
| Avian                    | 3   | NO  |
| Canine                   | 103 | NO  |
| Equine                   | 3   | YES |
| Feline                   | 28  | NO  |
| Lagomorpha               | 1   | NO  |
| Misc                     | 3   | NO  |
| Rodent                   | 3   | NO  |
| (blank)                  | 6   | NO  |

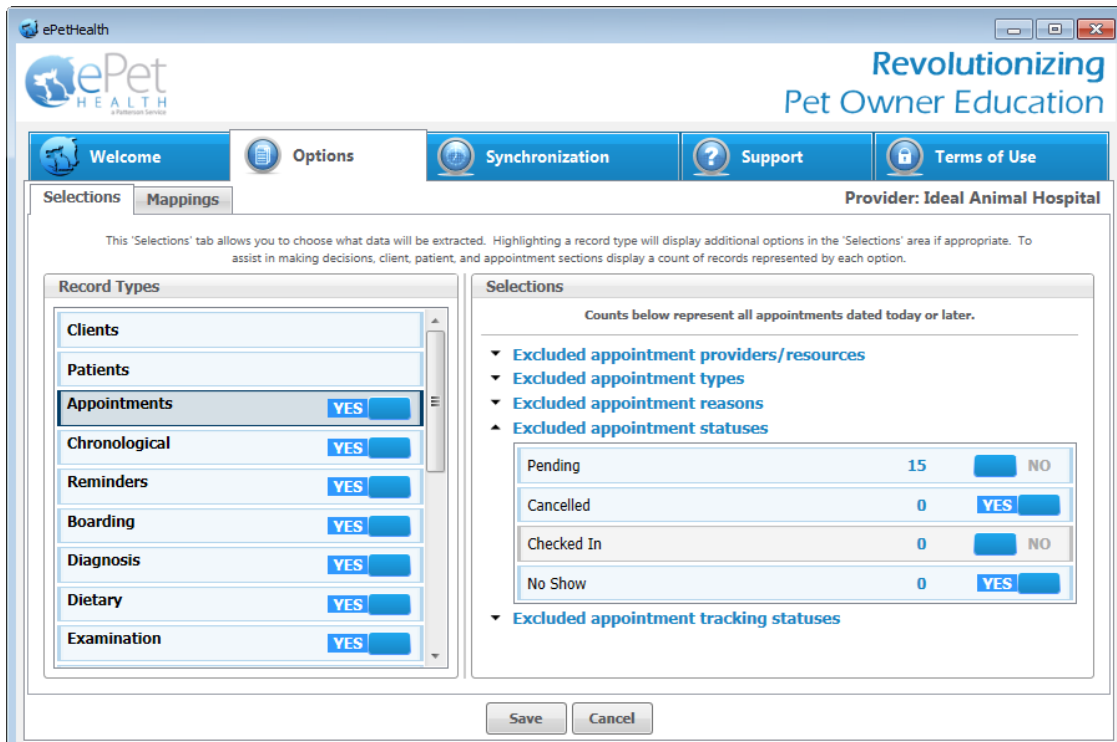
Save Cancel

## 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

**ClieTrax 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.

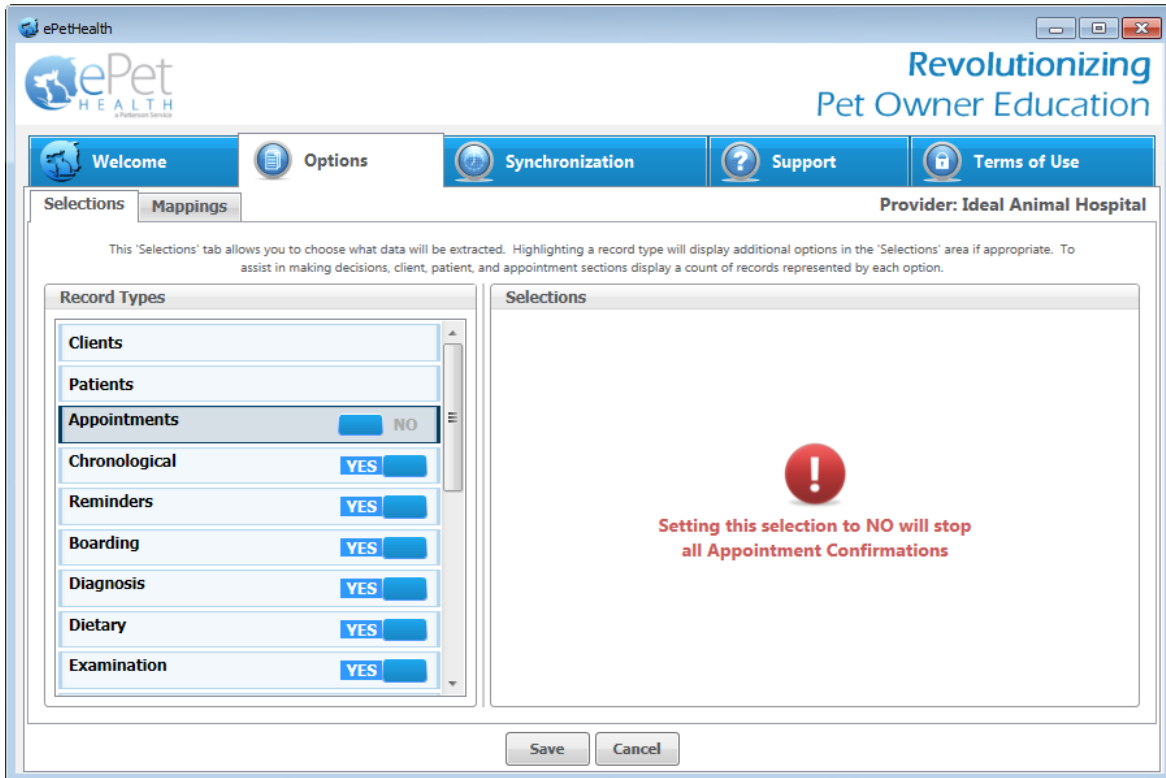


The screenshot shows the 'Appointment Selections' configuration window in the ePetHealth application. The window title is 'ePetHealth' and the provider is 'Ideal Animal Hospital'. The 'Record Types' section on the left lists various appointment types with 'YES' buttons next to them, indicating they are selected for extraction. The 'Selections' section on the right shows a table of appointment statuses with 'NO' buttons next to them, indicating they are excluded. The table includes columns for the status name, a count, and a 'YES/NO' toggle.

| Record Type   | Selection |
|---------------|-----------|
| Clients       | YES       |
| Patients      | YES       |
| Appointments  | YES       |
| Chronological | YES       |
| Reminders     | YES       |
| Boarding      | YES       |
| Diagnosis     | YES       |
| Dietary       | YES       |
| Examination   | YES       |

| Appointment Status | Count | Selection |
|--------------------|-------|-----------|
| Pending            | 15    | NO        |
| Cancelled          | 0     | YES       |
| Checked In         | 0     | NO        |
| No Show            | 0     | YES       |



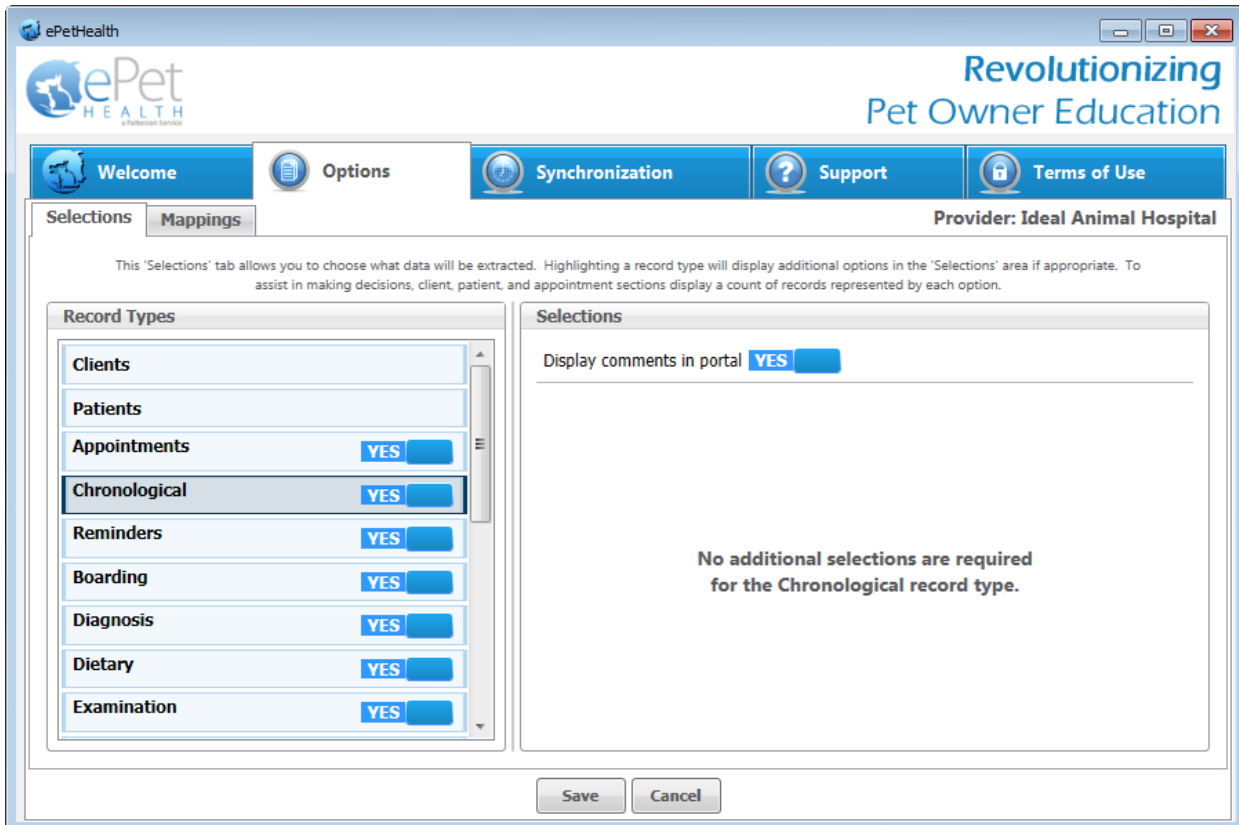
The screenshot shows the ePetHealth application window. The title bar reads 'ePetHealth'. The main header includes the ePetHealth logo and the text 'Revolutionizing Pet Owner Education'. Below the header is a navigation bar with buttons for 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The 'Options' button is active. The main content area has two tabs: 'Selections' (selected) and 'Mappings'. The provider name 'Ideal Animal Hospital' is displayed in the top right of the content area. A descriptive text block states: '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.' Below this text is a 'Record Types' table and a 'Selections' panel.

| Record Types  |     |
|---------------|-----|
| Clients       |     |
| Patients      |     |
| Appointments  | NO  |
| Chronological | YES |
| Reminders     | YES |
| Boarding      | YES |
| Diagnosis     | YES |
| Dietary       | YES |
| Examination   | YES |

The 'Selections' panel on the right contains a red warning icon and the following text: 'Setting this selection to NO will stop all Appointment Confirmations'. At the bottom of the window are 'Save' and 'Cancel' buttons.

## 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.



The screenshot shows the 'ePetHealth' application window with the 'Revolutionizing Pet Owner Education' header. The navigation bar includes 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The 'Options' tab is active, showing 'Selections' and 'Mappings' sub-tabs. The provider is identified as 'Ideal Animal Hospital'.

A descriptive text states: "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 <input type="checkbox"/>                   |
| <b>Chronological</b> | <b>YES <input checked="" type="checkbox"/></b> |
| Reminders            | YES <input type="checkbox"/>                   |
| Boarding             | YES <input type="checkbox"/>                   |
| Diagnosis            | YES <input type="checkbox"/>                   |
| Dietary              | YES <input type="checkbox"/>                   |
| Examination          | YES <input type="checkbox"/>                   |

The 'Selections' area contains the following configuration:

Display comments in portal **YES**

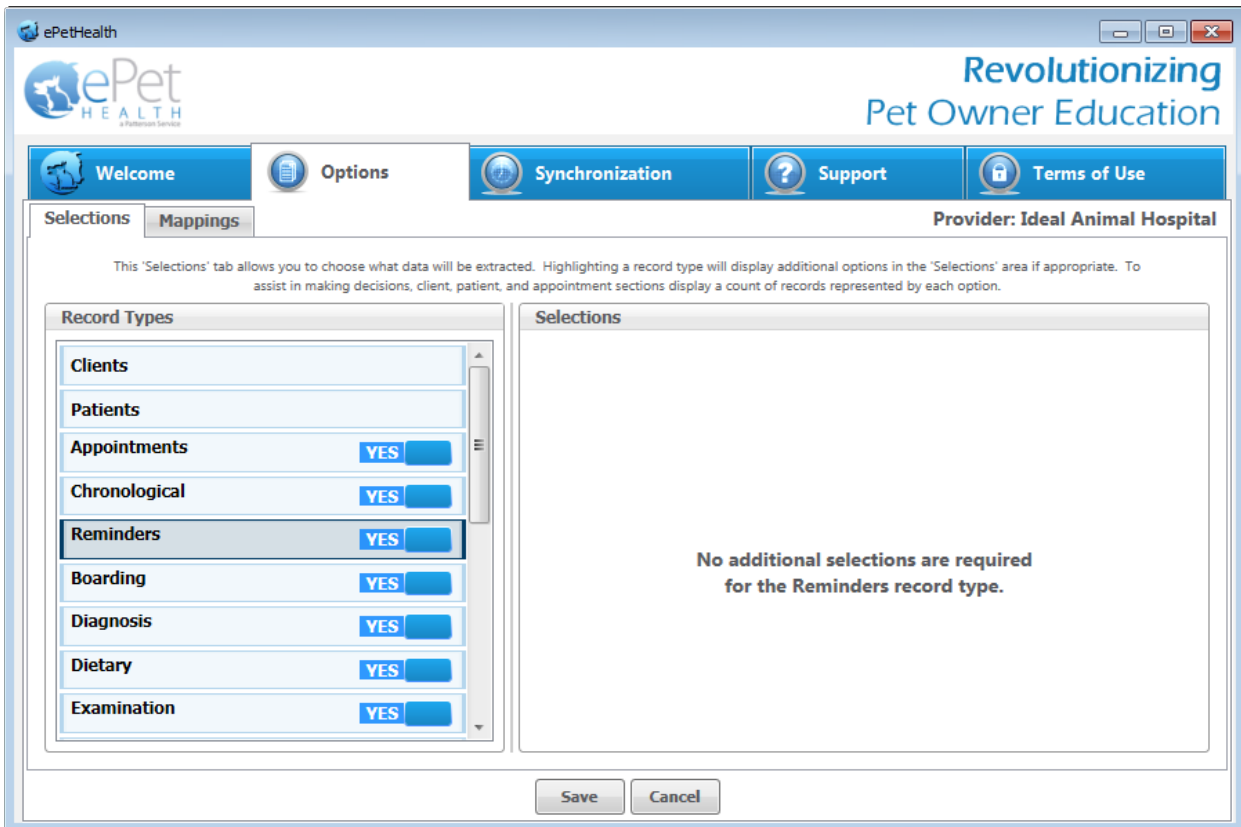
No additional selections are required for the Chronological record type.

Buttons for 'Save' and 'Cancel' are located at the bottom of the window.

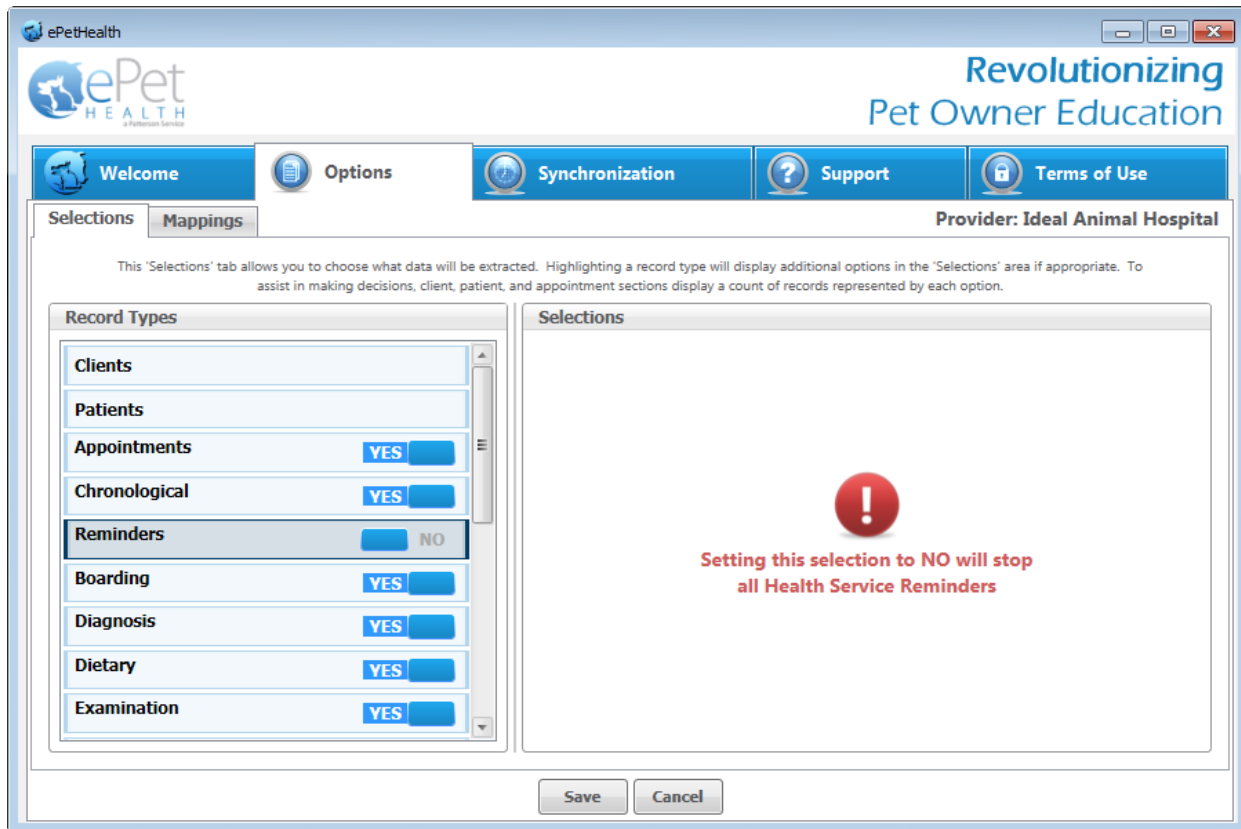


## Reminders Selections

- 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.



The screenshot shows the ePetHealth web interface for configuring reminders. The window title is 'ePetHealth' and the header includes the ePet Health logo and the slogan 'Revolutionizing Pet Owner Education'. The navigation menu contains 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The current page is 'Selections' for 'Provider: Ideal Animal Hospital'. A sub-tab 'Mappings' is also visible. A help text states: '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.' The 'Record Types' section is a list with checkboxes: Clients, Patients, Appointments (YES), Chronological (YES), Reminders (YES), Boarding (YES), Diagnosis (YES), Dietary (YES), and Examination (YES). The 'Reminders' row is highlighted. The 'Selections' area on the right contains the text: 'No additional selections are required for the Reminders record type.' At the bottom are 'Save' and 'Cancel' buttons.



The screenshot shows the 'Options' window in the ePetHealth application. The window title is 'ePetHealth' and it features the ePetHealth logo and the slogan 'Revolutionizing Pet Owner Education'. The navigation bar includes 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The 'Options' tab is active, and the 'Selections' sub-tab is selected. The provider is identified as 'Ideal Animal Hospital'.

A descriptive text states: "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."

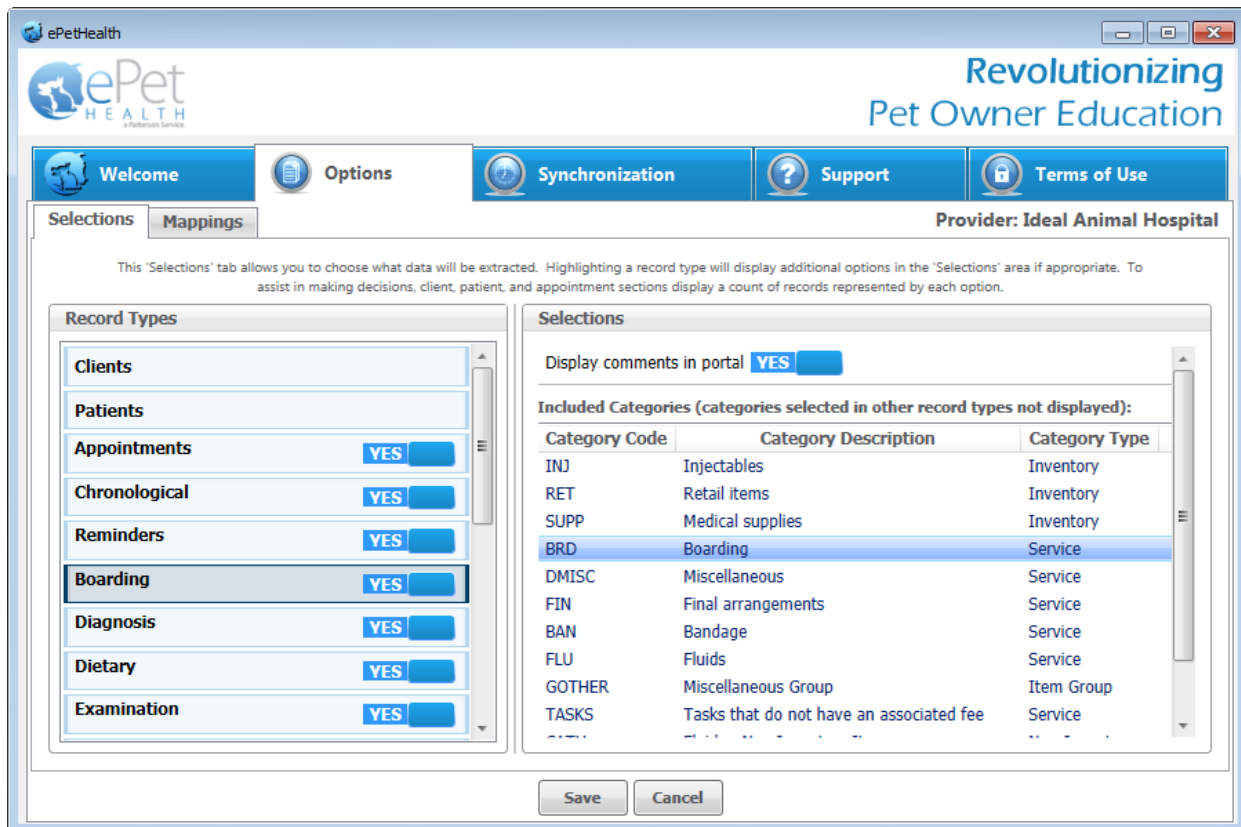
| Record Types  |     |
|---------------|-----|
| Clients       |     |
| Patients      |     |
| Appointments  | YES |
| Chronological | YES |
| Reminders     | NO  |
| Boarding      | YES |
| Diagnosis     | YES |
| Dietary       | YES |
| Examination   | YES |

The 'Selections' area on the right contains a red warning icon and the text: "Setting this selection to NO will stop all Health Service Reminders".

Buttons for 'Save' and 'Cancel' are located at the bottom of the window.

## Boarding Selections

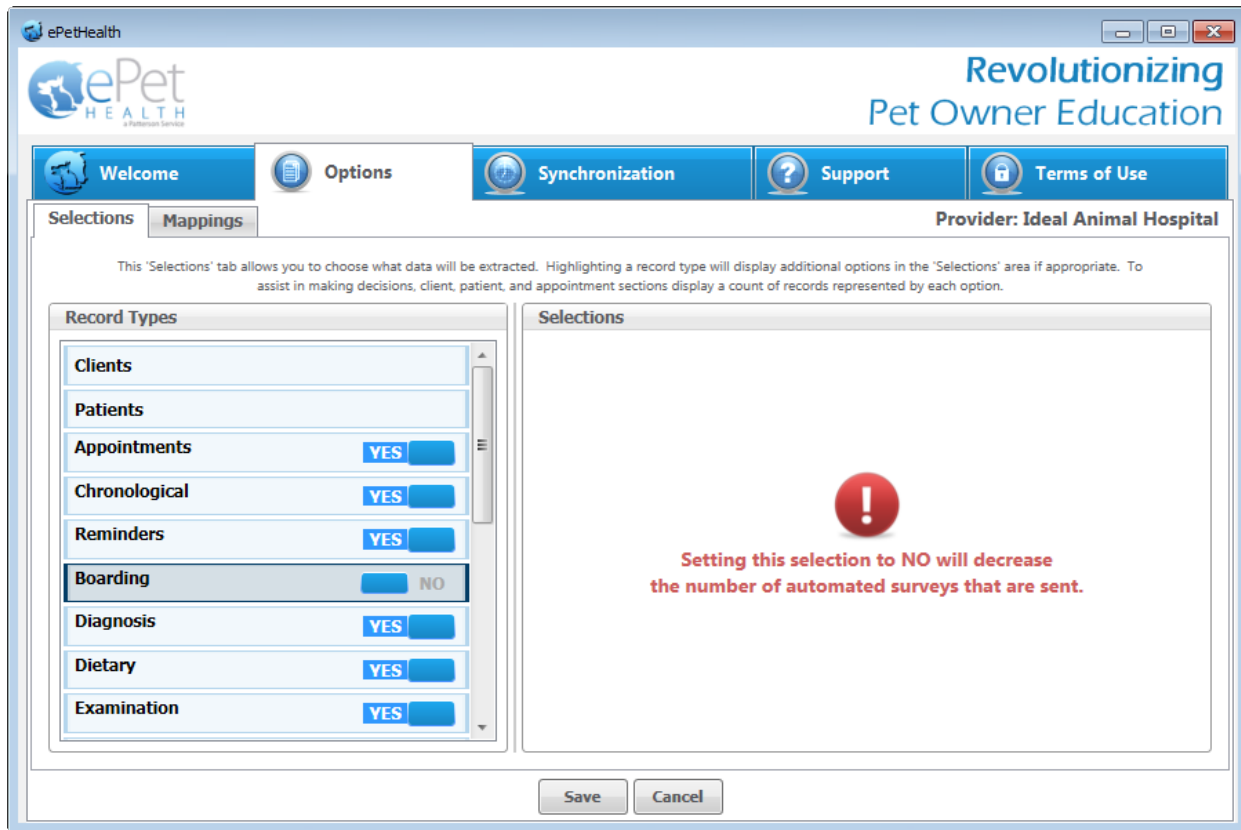
- The Boarding Record Type will display any Boarding items the patient may have on file in the Practice Management System. Date, time, description, quantity and notes (comments) are displayed in the ePetHealth Client Portal.
- This record type may be excluded by selecting 'no' (default) or included by 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.



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                                      | Selections  |               |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
|---|---|---------------|----------------------|---------------|-----|-------------|-----------|-----|--------------|-----------|------|------------------|-----------|-----|----------|---------|-------|---------------|---------|-----|--------------------|---------|-----|---------|---------|-----|--------|---------|--------|---------------------|------------|-------|--|---------|
| Clients   | Display comments in portal <input checked="" type="checkbox"/>  |               |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| Patients  |   |               |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| Appointments <input checked="" type="checkbox"/>  | <b>Included Categories (categories selected in other record types not displayed):</b>   |               |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| Chronological <input checked="" type="checkbox"/> | <table border="1"> <thead> <tr> <th>Category Code</th> <th>Category Description</th> <th>Category Type</th> </tr> </thead> <tbody> <tr> <td>INJ</td> <td>Injectables</td> <td>Inventory</td> </tr> <tr> <td>RET</td> <td>Retail items</td> <td>Inventory</td> </tr> <tr> <td>SUPP</td> <td>Medical supplies</td> <td>Inventory</td> </tr> <tr> <td>BRD</td> <td>Boarding</td> <td>Service</td> </tr> <tr> <td>DMISC</td> <td>Miscellaneous</td> <td>Service</td> </tr> <tr> <td>FIN</td> <td>Final arrangements</td> <td>Service</td> </tr> <tr> <td>BAN</td> <td>Bandage</td> <td>Service</td> </tr> <tr> <td>FLU</td> <td>Fluids</td> <td>Service</td> </tr> <tr> <td>GOTHER</td> <td>Miscellaneous Group</td> <td>Item Group</td> </tr> <tr> <td>TASKS</td> <td>Tasks that do not have an associated fee</td> <td>Service</td> </tr> </tbody> </table> | Category Code | Category Description | Category Type | INJ | Injectables | Inventory | RET | Retail items | Inventory | SUPP | Medical supplies | Inventory | BRD | Boarding | Service | DMISC | Miscellaneous | Service | FIN | Final arrangements | Service | BAN | Bandage | Service | FLU | Fluids | Service | GOTHER | Miscellaneous Group | Item Group | TASKS | Tasks that do not have an associated fee | Service |
| Category Code                                     | Category Description  | Category Type |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| INJ   | Injectables   | Inventory     |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| RET   | Retail items  | Inventory     |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| SUPP  | Medical supplies  | Inventory     |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| BRD   | Boarding  | Service       |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| DMISC   | Miscellaneous   | Service       |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| FIN   | Final arrangements  | Service       |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| BAN   | Bandage   | Service       |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| FLU   | Fluids  | Service       |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| GOTHER  | Miscellaneous Group   | Item Group    |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| TASKS   | Tasks that do not have an associated fee  | Service       |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| Reminders <input checked="" type="checkbox"/>     |   |               |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| Boarding <input checked="" type="checkbox"/>      |   |               |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| Diagnosis <input checked="" type="checkbox"/>     |   |               |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| Dietary <input checked="" type="checkbox"/>       |   |               |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |
| Examination <input checked="" type="checkbox"/>   |   |               |                      |               |     |             |           |     |              |           |      |                  |           |     |          |         |       |               |         |     |                    |         |     |         |         |     |        |         |        |                     |            |       |  |         |

Buttons: Save, Cancel



The screenshot shows the 'ePetHealth' application window. The title bar reads 'ePetHealth'. The main header area contains the ePet Health logo on the left and the text 'Revolutionizing Pet Owner Education' on the right. Below the header is a navigation bar with buttons for 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The 'Options' button is active. Underneath, there are tabs for 'Selections' and 'Mappings'. The 'Selections' tab is selected, and the provider name 'Ideal Animal Hospital' is displayed in the top right corner of the main content area.

A descriptive text block states: '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.'

The 'Record Types' section on the left contains a list of record types with corresponding 'YES' or 'NO' toggle buttons:

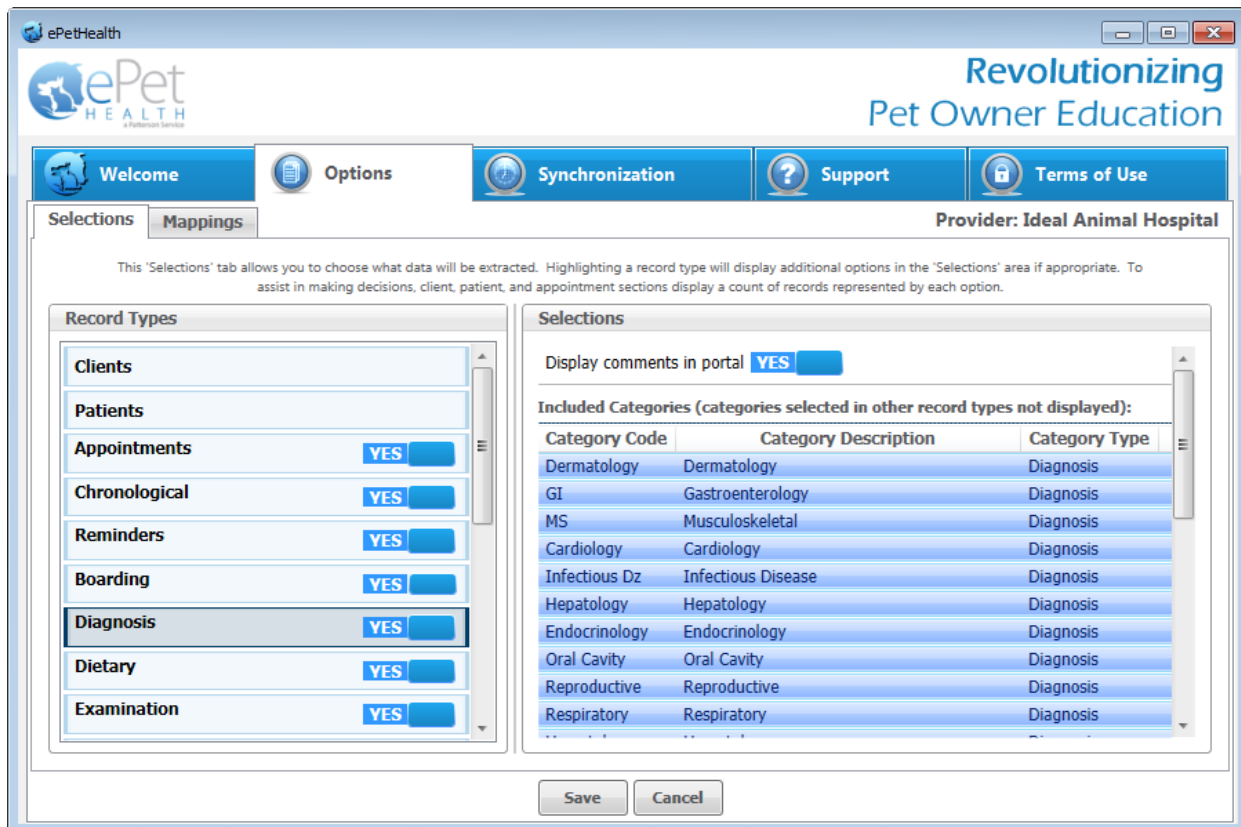
| Record Type   | Selection |
|---------------|-----------|
| Clients       |           |
| Patients      |           |
| Appointments  | YES       |
| Chronological | YES       |
| Reminders     | YES       |
| Boarding      | NO        |
| Diagnosis     | YES       |
| Dietary       | YES       |
| Examination   | YES       |

The 'Selections' area on the right is currently empty, displaying a red warning icon and the following text: 'Setting this selection to NO will decrease the number of automated surveys that are sent.'

At the bottom of the window are 'Save' and 'Cancel' buttons.

## 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.



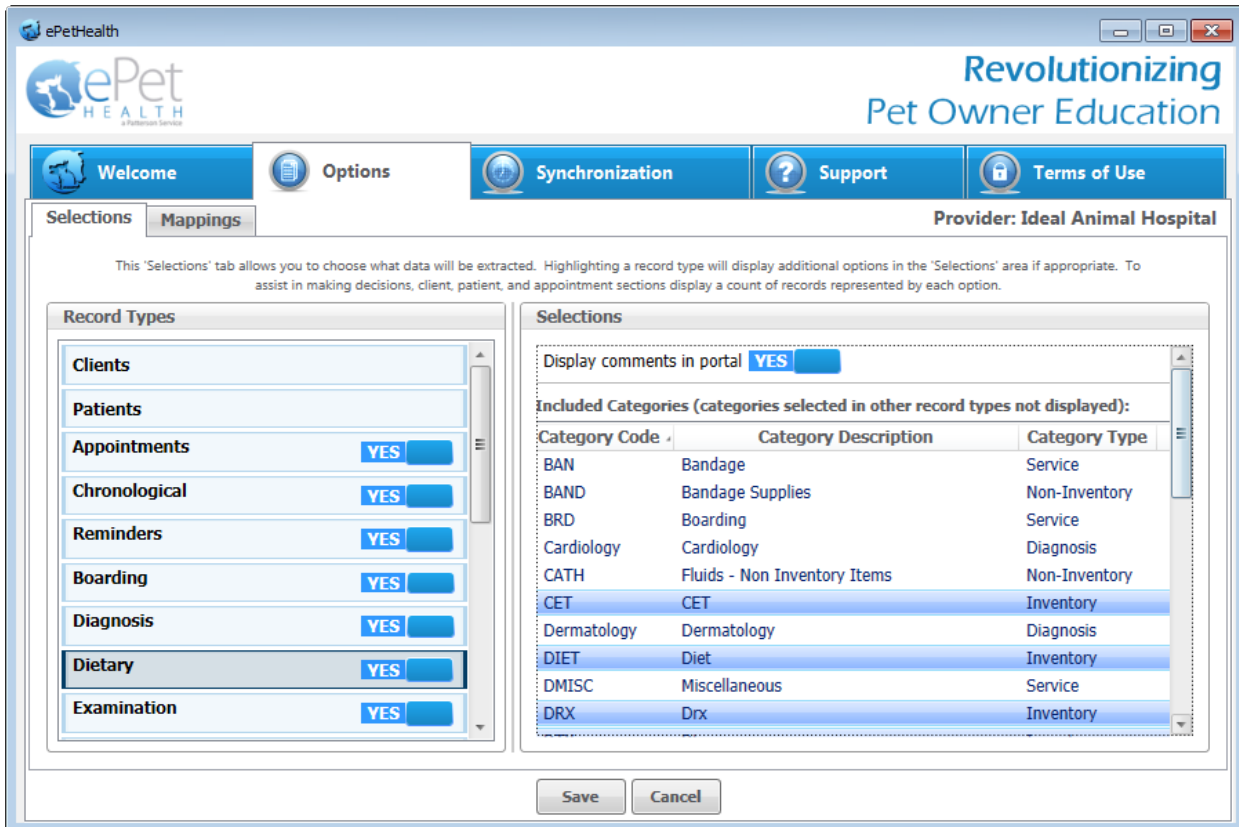
This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.

| Record Types   | Selections   |               |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
|--|--|---------------|----------------------|---------------|-------------|-------------|-----------|----|------------------|-----------|----|-----------------|-----------|------------|------------|-----------|---------------|--------------------|-----------|------------|------------|-----------|---------------|---------------|-----------|-------------|-------------|-----------|--------------|--------------|-----------|-------------|-------------|-----------|
| Clients  | Display comments in portal <input type="checkbox"/>  |               |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Patients   |  |               |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Appointments <input checked="" type="checkbox"/>     | <b>Included Categories (categories selected in other record types not displayed):</b>  |               |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Chronological <input checked="" type="checkbox"/>    | <table border="1"> <thead> <tr> <th>Category Code</th> <th>Category Description</th> <th>Category Type</th> </tr> </thead> <tbody> <tr><td>Dermatology</td><td>Dermatology</td><td>Diagnosis</td></tr> <tr><td>GI</td><td>Gastroenterology</td><td>Diagnosis</td></tr> <tr><td>MS</td><td>Musculoskeletal</td><td>Diagnosis</td></tr> <tr><td>Cardiology</td><td>Cardiology</td><td>Diagnosis</td></tr> <tr><td>Infectious Dz</td><td>Infectious Disease</td><td>Diagnosis</td></tr> <tr><td>Hepatology</td><td>Hepatology</td><td>Diagnosis</td></tr> <tr><td>Endocrinology</td><td>Endocrinology</td><td>Diagnosis</td></tr> <tr><td>Oral Cavity</td><td>Oral Cavity</td><td>Diagnosis</td></tr> <tr><td>Reproductive</td><td>Reproductive</td><td>Diagnosis</td></tr> <tr><td>Respiratory</td><td>Respiratory</td><td>Diagnosis</td></tr> </tbody> </table> | Category Code | Category Description | Category Type | Dermatology | Dermatology | Diagnosis | GI | Gastroenterology | Diagnosis | MS | Musculoskeletal | Diagnosis | Cardiology | Cardiology | Diagnosis | Infectious Dz | Infectious Disease | Diagnosis | Hepatology | Hepatology | Diagnosis | Endocrinology | Endocrinology | Diagnosis | Oral Cavity | Oral Cavity | Diagnosis | Reproductive | Reproductive | Diagnosis | Respiratory | Respiratory | Diagnosis |
| Category Code  | Category Description   | Category Type |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Dermatology  | Dermatology  | Diagnosis     |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| GI   | Gastroenterology   | Diagnosis     |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| MS   | Musculoskeletal  | Diagnosis     |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Cardiology   | Cardiology   | Diagnosis     |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Infectious Dz  | Infectious Disease   | Diagnosis     |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Hepatology   | Hepatology   | Diagnosis     |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Endocrinology  | Endocrinology  | Diagnosis     |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Oral Cavity  | Oral Cavity  | Diagnosis     |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Reproductive   | Reproductive   | Diagnosis     |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Respiratory  | Respiratory  | Diagnosis     |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Reminders <input checked="" type="checkbox"/>        |  |               |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Boarding <input checked="" type="checkbox"/>         |  |               |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| <b>Diagnosis <input checked="" type="checkbox"/></b> |  |               |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Dietary <input checked="" type="checkbox"/>          |  |               |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |
| Examination <input checked="" type="checkbox"/>      |  |               |                      |               |             |             |           |    |                  |           |    |                 |           |            |            |           |               |                    |           |            |            |           |               |               |           |             |             |           |              |              |           |             |             |           |

Buttons: Save, Cancel

## 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.



The screenshot shows the 'Selections' configuration window in the ePetHealth application. The window title is 'ePetHealth' and the header includes the ePetHealth logo and the slogan 'Revolutionizing Pet Owner Education'. The navigation bar contains 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The current provider is 'Ideal Animal Hospital'.

The 'Selections' tab is active, showing a list of 'Record Types' on the left and a 'Selections' table on the right. The 'Record Types' list includes: Clients, Patients, Appointments (YES), Chronological (YES), Reminders (YES), Boarding (YES), Diagnosis (YES), Dietary (YES), and Examination (YES). The 'Dietary' record type is highlighted.

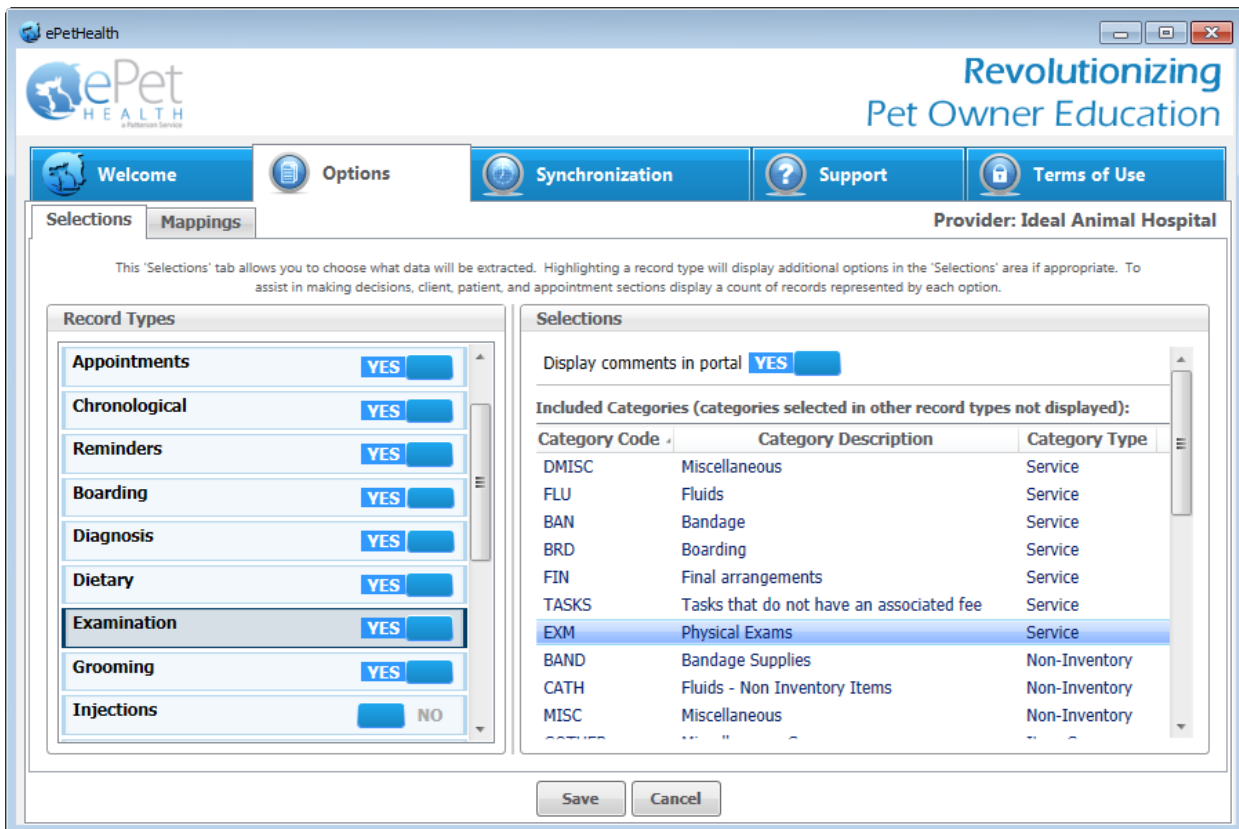
The 'Selections' table is titled 'Included Categories (categories selected in other record types not displayed):' and contains the following data:

| Category Code | Category Description         | Category Type |
|---------------|------------------------------|---------------|
| BAN           | Bandage                      | Service       |
| BAND          | Bandage Supplies             | Non-Inventory |
| BRD           | Boarding                     | Service       |
| Cardiology    | Cardiology                   | Diagnosis     |
| CATH          | Fluids - Non Inventory Items | Non-Inventory |
| CET           | CET                          | Inventory     |
| Dermatology   | Dermatology                  | Diagnosis     |
| DIET          | Diet                         | Inventory     |
| DMISC         | Miscellaneous                | Service       |
| DRX           | Drx                          | Inventory     |

At the top of the 'Selections' table, there is a checkbox for 'Display comments in portal' which is currently checked (YES). At the bottom of the window are 'Save' and 'Cancel' buttons.

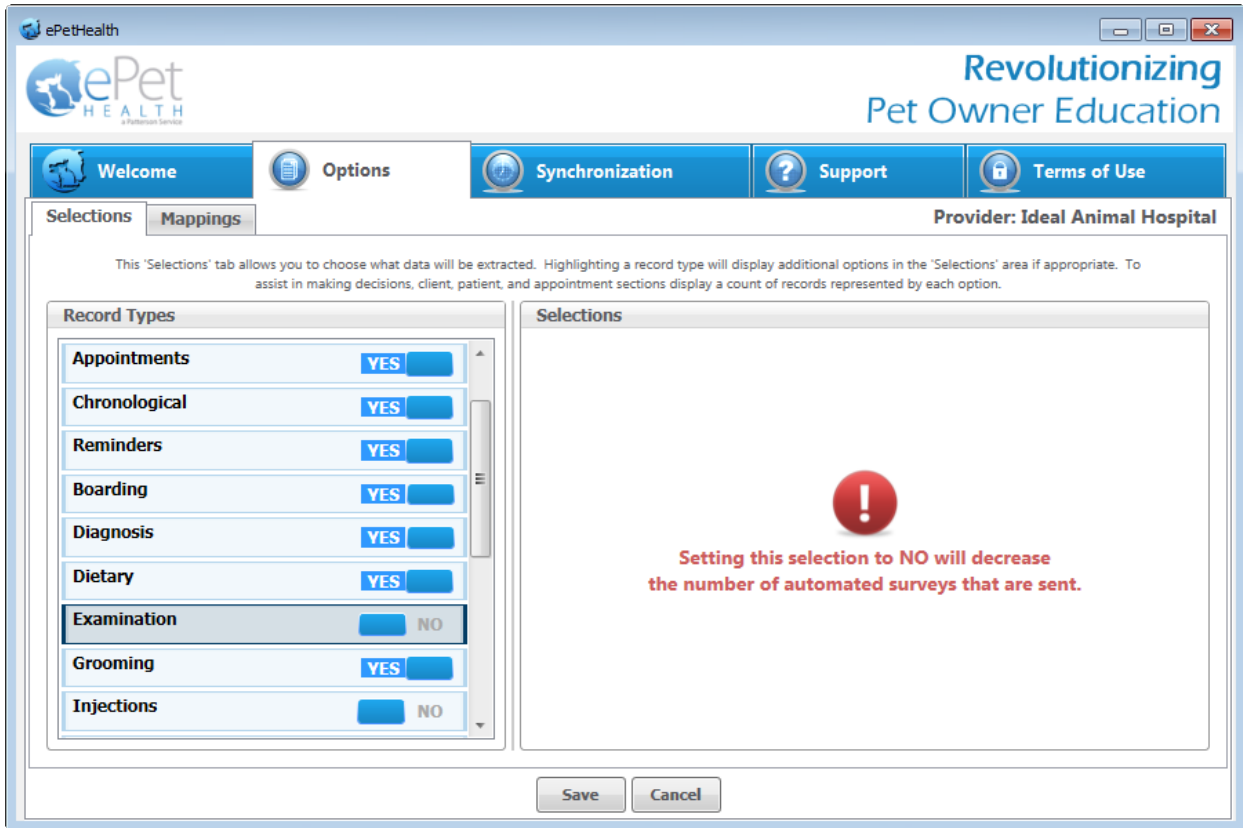
## Examination Selections

- 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.



The screenshot shows the 'Selections' configuration window in the ePetHealth application. The window title is 'ePetHealth' and the provider is 'Ideal Animal Hospital'. The 'Record Types' section on the left has 'Examination' selected with 'YES'. The 'Selections' section on the right has 'Display comments in portal' set to 'YES'. Below this is a table of 'Included Categories'.

| Category Code | Category Description                     | Category Type |
|---------------|--|---------------|
| DMISC         | Miscellaneous                            | Service       |
| FLU           | Fluids                                   | Service       |
| BAN           | Bandage                                  | Service       |
| BRD           | Boarding                                 | Service       |
| FIN           | Final arrangements                       | Service       |
| TASKS         | Tasks that do not have an associated fee | Service       |
| EXM           | Physical Exams                           | Service       |
| BAND          | Bandage Supplies                         | Non-Inventory |
| CATH          | Fluids - Non Inventory Items             | Non-Inventory |
| MISC          | Miscellaneous                            | Non-Inventory |

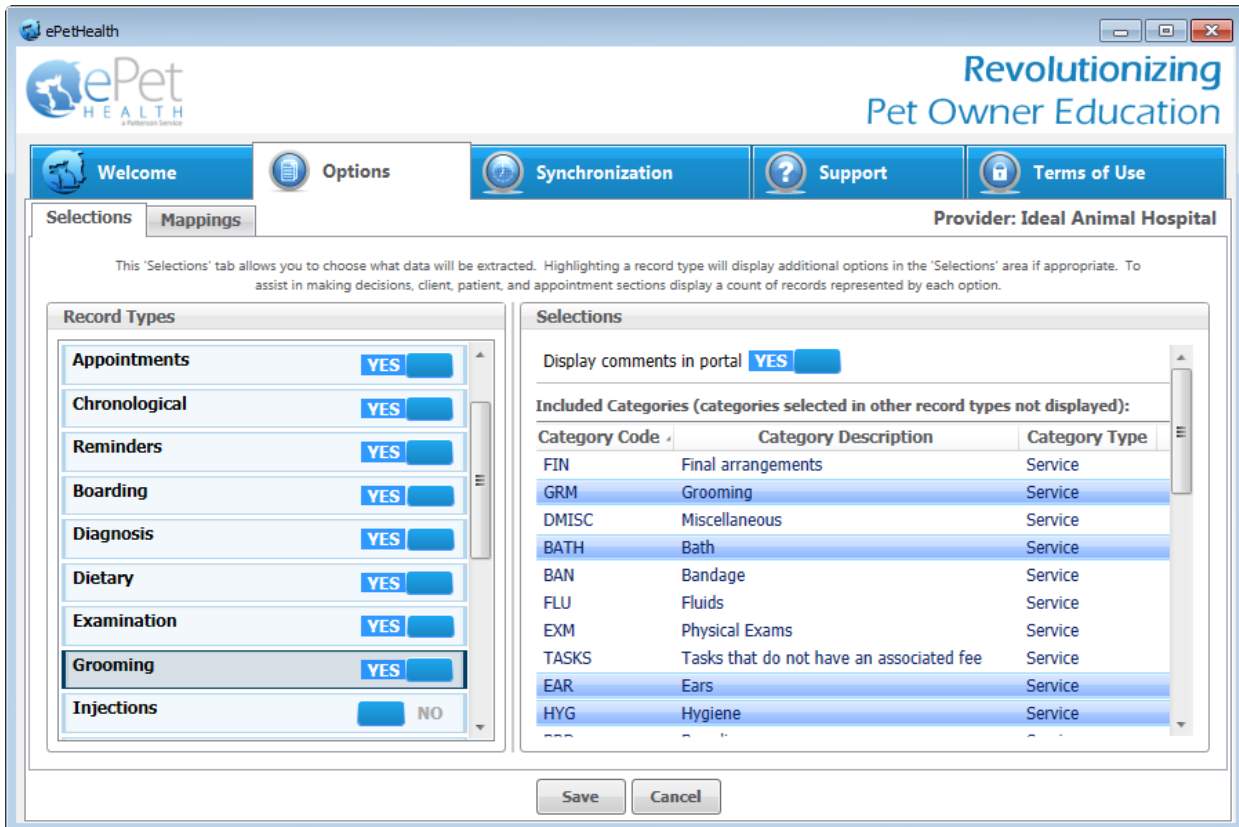


The screenshot shows the ePetHealth application window. The title bar reads 'ePetHealth'. The main header includes the ePet Health logo and the text 'Revolutionizing Pet Owner Education'. Below the header is a navigation bar with buttons for 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The 'Options' button is active. Underneath, there are tabs for 'Selections' and 'Mappings'. The 'Selections' tab is selected, and the provider is identified as 'Ideal Animal Hospital'. A descriptive text states: '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.' On the left, a 'Record Types' list includes: Appointments (YES), Chronological (YES), Reminders (YES), Boarding (YES), Diagnosis (YES), Dietary (YES), Examination (NO), Grooming (YES), and Injections (NO). On the right, a 'Selections' area contains a red warning icon and the text: 'Setting this selection to NO will decrease the number of automated surveys that are sent.' At the bottom are 'Save' and 'Cancel' buttons.



## 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.



The screenshot shows the 'Selections' configuration window in the ePetHealth application. The window title is 'ePetHealth' and the subtitle is 'Revolutionizing Pet Owner Education'. The provider is identified as 'Ideal Animal Hospital'. The 'Record Types' section on the left has 'Grooming' selected with a 'YES' button, while 'Injections' is set to 'NO'. The 'Selections' section on the right has 'Display comments in portal' set to 'YES'. Below this is a table of 'Included Categories'.

| Category Code | Category Description                     | Category Type |
|---------------|--|---------------|
| FIN           | Final arrangements                       | Service       |
| GRM           | Grooming                                 | Service       |
| DMISC         | Miscellaneous                            | Service       |
| BATH          | Bath                                     | Service       |
| BAN           | Bandage                                  | Service       |
| FLU           | Fluids                                   | Service       |
| EXM           | Physical Exams                           | Service       |
| TASKS         | Tasks that do not have an associated fee | Service       |
| EAR           | Ears                                     | Service       |
| HYG           | Hygiene                                  | Service       |

Buttons for 'Save' and 'Cancel' are located at the bottom of the window.



## 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

|               |   |
|---------------|---|
| Appointments  | <input checked="" type="checkbox"/> YES |
| Chronological | <input checked="" type="checkbox"/> YES |
| Reminders     | <input checked="" type="checkbox"/> YES |
| Boarding      | <input checked="" type="checkbox"/> YES |
| Diagnosis     | <input checked="" type="checkbox"/> YES |
| Dietary       | <input checked="" type="checkbox"/> YES |
| Examination   | <input checked="" type="checkbox"/> YES |
| Grooming      | <input type="checkbox"/> NO             |
| Injections    | <input type="checkbox"/> NO             |

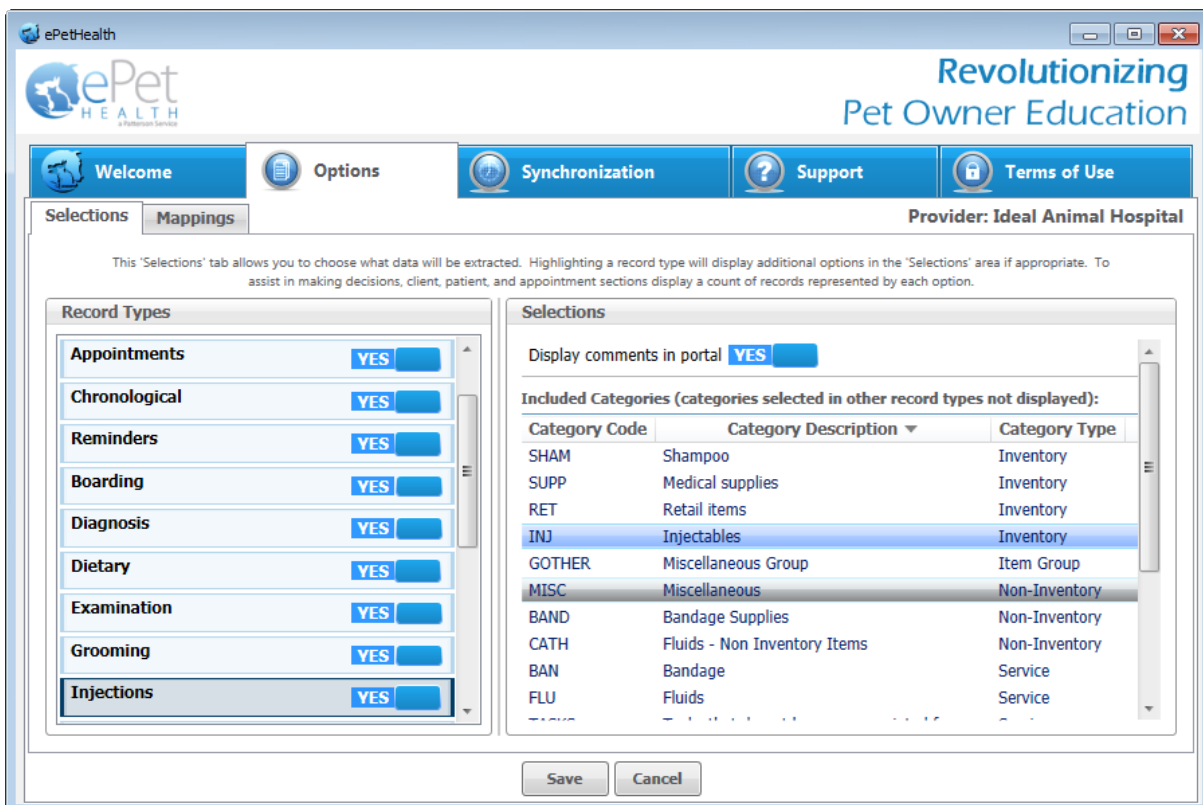
Selections



Setting this selection to NO will decrease  
the number of automated surveys that are sent.

## 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.



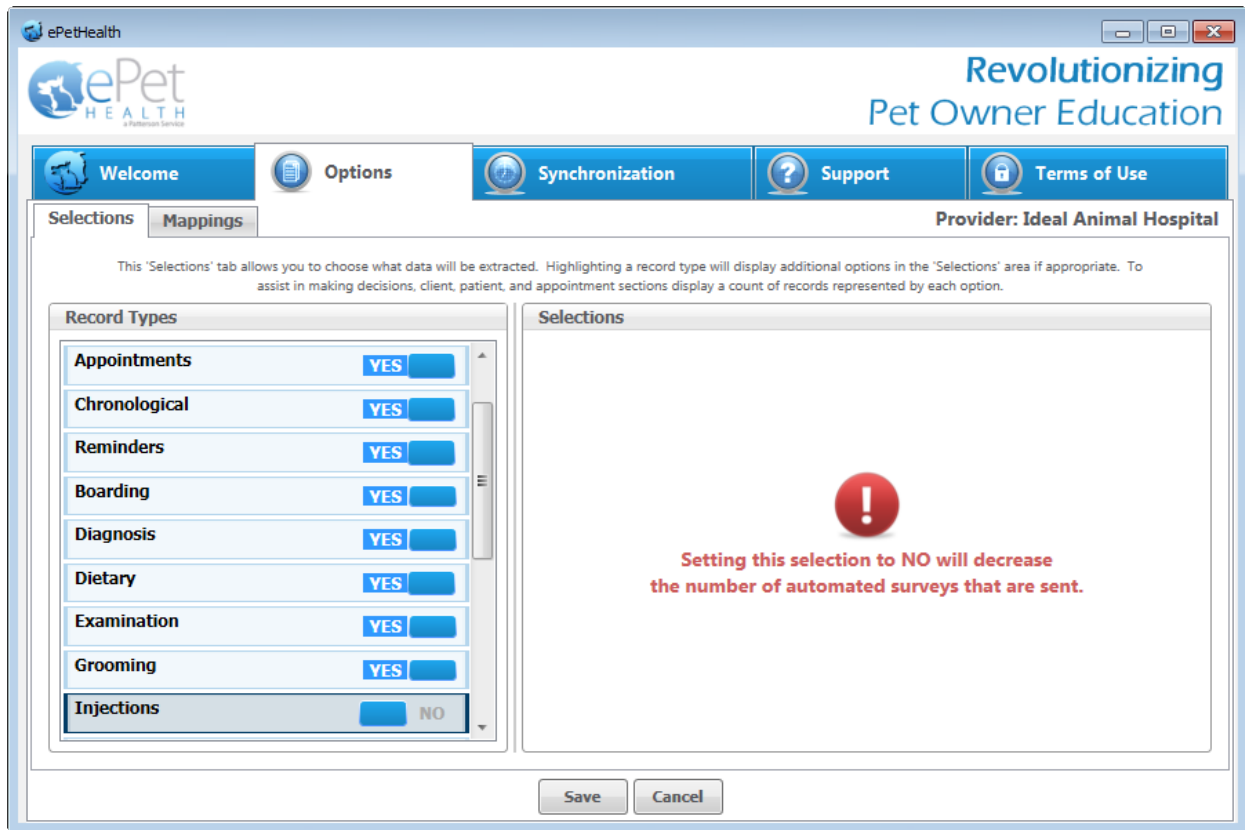
This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.

| Record Type   | Selection |
|---------------|-----------|
| Appointments  | YES       |
| Chronological | YES       |
| Reminders     | YES       |
| Boarding      | YES       |
| Diagnosis     | YES       |
| Dietary       | YES       |
| Examination   | YES       |
| Grooming      | YES       |
| Injections    | YES       |

Display comments in portal

| Category Code | Category Description         | Category Type |
|---------------|------------------------------|---------------|
| SHAM          | Shampoo                      | Inventory     |
| SUPP          | Medical supplies             | Inventory     |
| RET           | Retail items                 | Inventory     |
| INJ           | Injectables                  | Inventory     |
| GOTHER        | Miscellaneous Group          | Item Group    |
| MISC          | Miscellaneous                | Non-Inventory |
| BAND          | Bandage Supplies             | Non-Inventory |
| CATH          | Fluids - Non Inventory Items | Non-Inventory |
| BAN           | Bandage                      | Service       |
| FLU           | Fluids                       | Service       |

Save Cancel



The screenshot shows the ePetHealth application window with the 'Options' tab selected. The 'Selections' sub-tab is active, showing a list of record types and their corresponding selection status. A warning message is displayed in the 'Selections' area, indicating that setting 'Injections' to 'NO' will decrease the number of automated surveys sent.

**Record Types**

| Record Type   | Selection |
|---------------|-----------|
| Appointments  | YES       |
| Chronological | YES       |
| Reminders     | YES       |
| Boarding      | YES       |
| Diagnosis     | YES       |
| Dietary       | YES       |
| Examination   | YES       |
| Grooming      | YES       |
| Injections    | NO        |

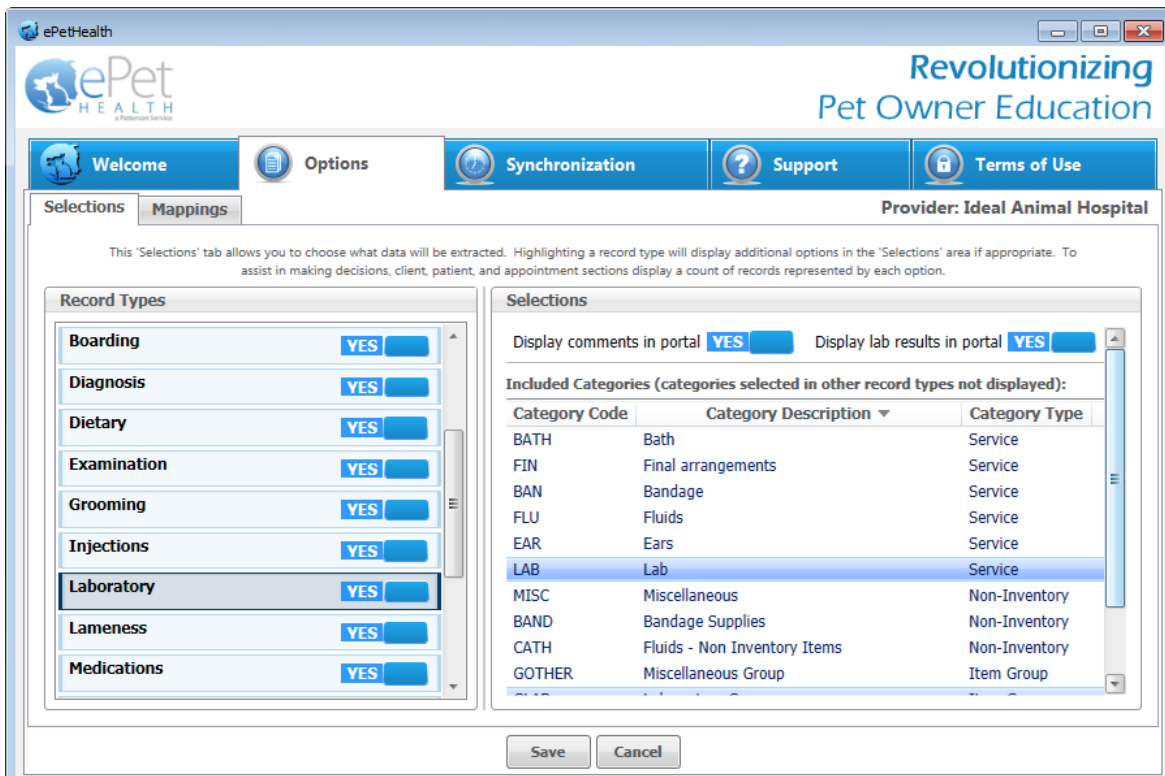
**Selections**

**Setting this selection to NO will decrease the number of automated surveys that are sent.**

Buttons: 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.



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 Type | Selection |
|-------------|-----------|
| Boarding    | YES       |
| Diagnosis   | YES       |
| Dietary     | YES       |
| Examination | YES       |
| Grooming    | YES       |
| Injections  | YES       |
| Laboratory  | YES       |
| Lameness    | YES       |
| Medications | YES       |

Display comments in portal  Display lab results in portal

Included Categories (categories selected in other record types not displayed):

| Category Code | Category Description         | Category Type |
|---------------|------------------------------|---------------|
| BATH          | Bath                         | Service       |
| FIN           | Final arrangements           | Service       |
| BAN           | Bandage                      | Service       |
| FLU           | Fluids                       | Service       |
| EAR           | Ears                         | Service       |
| LAB           | Lab                          | Service       |
| MISC          | Miscellaneous                | Non-Inventory |
| BAND          | Bandage Supplies             | Non-Inventory |
| CATH          | Fluids - Non Inventory Items | Non-Inventory |
| GOTHER        | Miscellaneous Group          | Item Group    |

Save Cancel



## Revolutionizing Pet Owner Education

Welcome

Options

Synchronization

Support

Terms of Use


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

|             |     |
|-------------|-----|
| Boarding    | YES |
| Diagnosis   | YES |
| Dietary     | YES |
| Examination | YES |
| Grooming    | YES |
| Injections  | YES |
| Laboratory  | NO  |
| Lameness    | YES |
| Medications | YES |

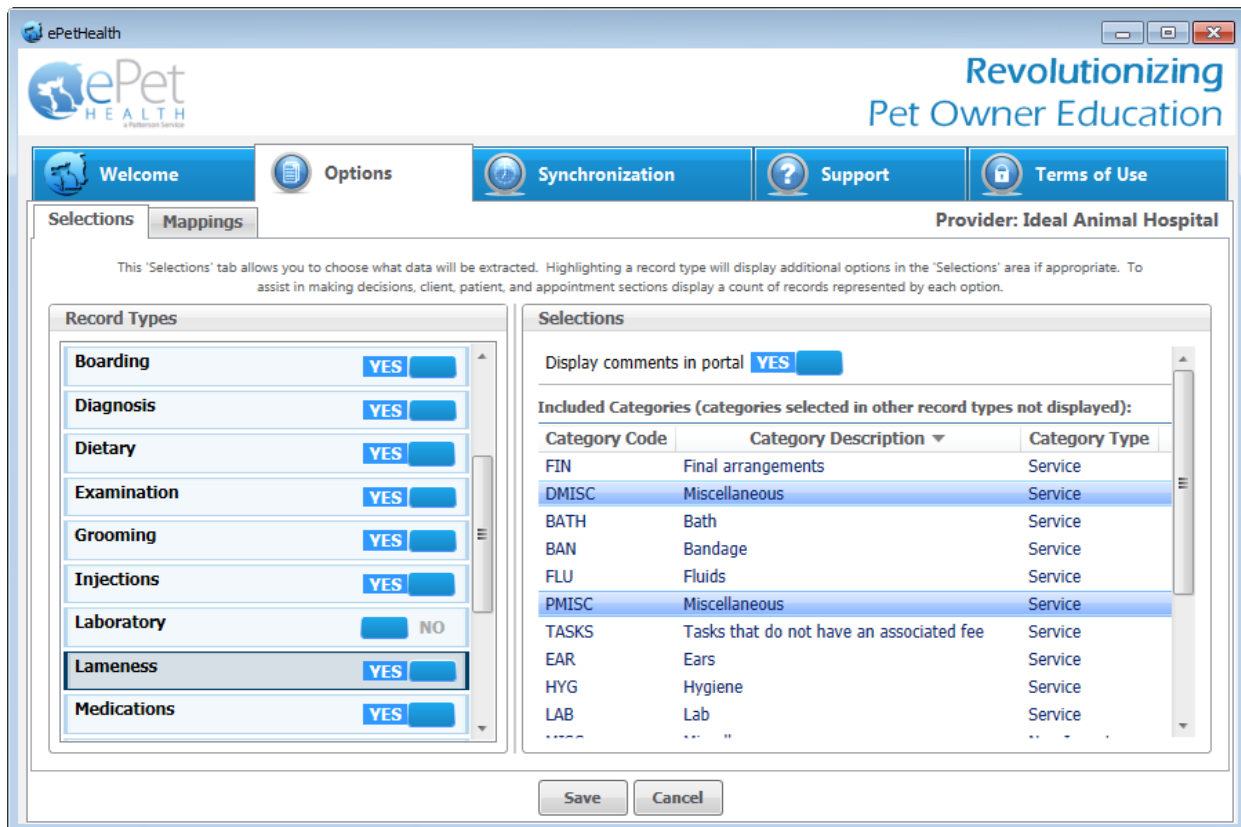
#### Selections



Setting this selection to NO will decrease the number of automated surveys that are sent.

## Lameness Selections

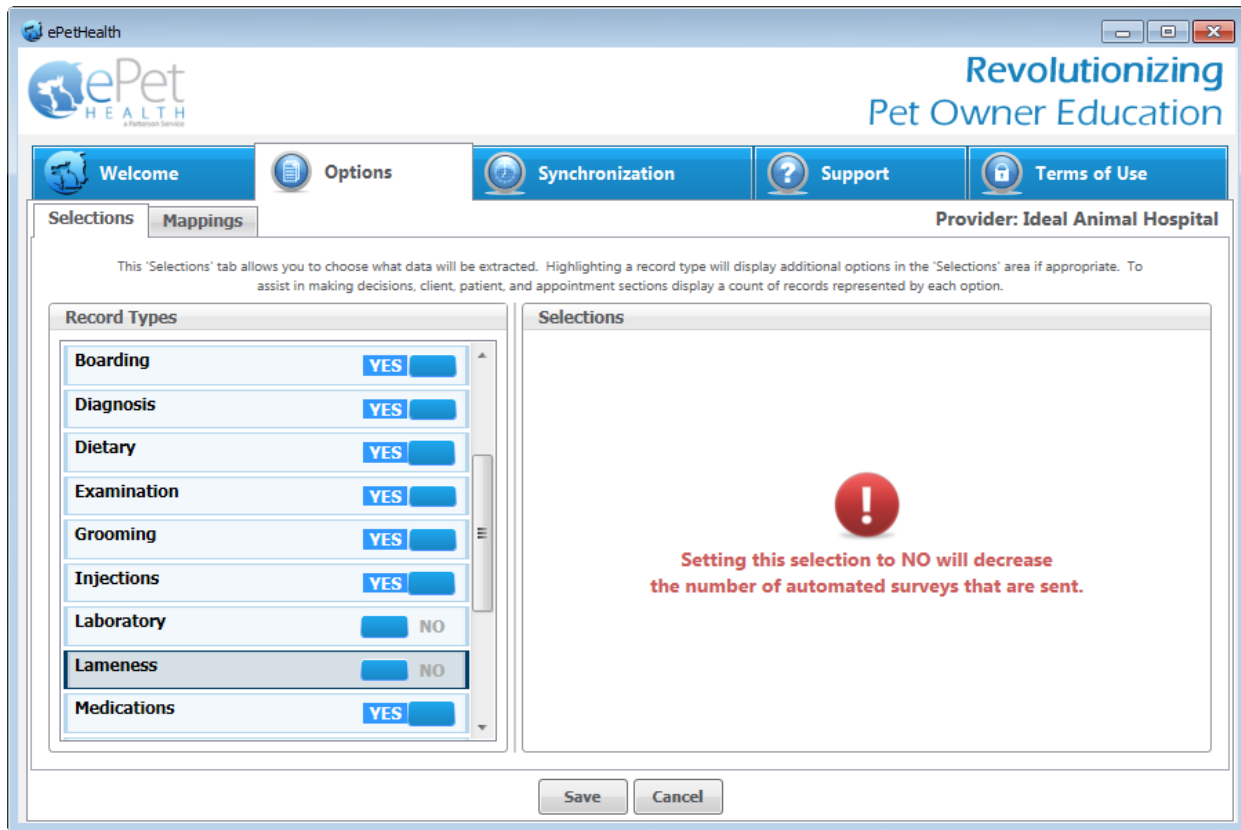
- The Lameness Record Type will display any lameness related items the patient may have received. The date, time, description, quantity and notes (comments) are displayed.
- This record type may be excluded by selecting 'no' (default) or included by selecting 'yes'.
- In the Selections Table, comments (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.



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    | Selections  |  |                      |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
|-----------------|---|--|----------------------|---------------|-----|--------------------|---------|-------|---------------|---------|------|------|---------|-----|---------|---------|-----|--------|---------|-------|---------------|---------|-------|--|---------|-----|------|---------|-----|---------|---------|-----|-----|---------|------|-------|-------|
| Boarding        | Display comments in portal <input checked="" type="checkbox"/>  |  |                      |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| Diagnosis       | <b>Included Categories (categories selected in other record types not displayed):</b> <table border="1"> <thead> <tr> <th>Category Code</th> <th>Category Description</th> <th>Category Type</th> </tr> </thead> <tbody> <tr><td>FIN</td><td>Final arrangements</td><td>Service</td></tr> <tr><td>DMISC</td><td>Miscellaneous</td><td>Service</td></tr> <tr><td>BATH</td><td>Bath</td><td>Service</td></tr> <tr><td>BAN</td><td>Bandage</td><td>Service</td></tr> <tr><td>FLU</td><td>Fluids</td><td>Service</td></tr> <tr><td>PMISC</td><td>Miscellaneous</td><td>Service</td></tr> <tr><td>TASKS</td><td>Tasks that do not have an associated fee</td><td>Service</td></tr> <tr><td>EAR</td><td>Ears</td><td>Service</td></tr> <tr><td>HYG</td><td>Hygiene</td><td>Service</td></tr> <tr><td>LAB</td><td>Lab</td><td>Service</td></tr> <tr><td>....</td><td>.. ..</td><td>.. ..</td></tr> </tbody> </table> | Category Code                            | Category Description | Category Type | FIN | Final arrangements | Service | DMISC | Miscellaneous | Service | BATH | Bath | Service | BAN | Bandage | Service | FLU | Fluids | Service | PMISC | Miscellaneous | Service | TASKS | Tasks that do not have an associated fee | Service | EAR | Ears | Service | HYG | Hygiene | Service | LAB | Lab | Service | .... | .. .. | .. .. |
| Category Code   |   | Category Description                     | Category Type        |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| FIN             |   | Final arrangements                       | Service              |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| DMISC           |   | Miscellaneous                            | Service              |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| BATH            |   | Bath                                     | Service              |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| BAN             |   | Bandage                                  | Service              |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| FLU             |   | Fluids                                   | Service              |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| PMISC           |   | Miscellaneous                            | Service              |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| TASKS           |   | Tasks that do not have an associated fee | Service              |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| EAR             |   | Ears                                     | Service              |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| HYG             |   | Hygiene                                  | Service              |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| LAB             |   | Lab                                      | Service              |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| ....            | .. ..   | .. ..                                    |                      |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| Dietary         |   |  |                      |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| Examination     |   |  |                      |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| Grooming        |   |  |                      |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| Injections      |   |  |                      |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| Laboratory      |   |  |                      |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| <b>Lameness</b> |   |  |                      |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |
| Medications     |   |  |                      |               |     |                    |         |       |               |         |      |      |         |     |         |         |     |        |         |       |               |         |       |  |         |     |      |         |     |         |         |     |     |         |      |       |       |

Buttons: Save, Cancel



The screenshot shows the 'Options' window in the ePetHealth application. The window title is 'ePetHealth' and it features the ePet Health logo and the slogan 'Revolutionizing Pet Owner Education'. The navigation bar includes 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The current view is the 'Options' tab, which is divided into 'Selections' and 'Mappings'. The 'Provider' is identified as 'Ideal Animal Hospital'.

A descriptive text states: "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     | <input checked="" type="checkbox"/> YES |
| Diagnosis    | <input checked="" type="checkbox"/> YES |
| Dietary      | <input checked="" type="checkbox"/> YES |
| Examination  | <input checked="" type="checkbox"/> YES |
| Grooming     | <input checked="" type="checkbox"/> YES |
| Injections   | <input checked="" type="checkbox"/> YES |
| Laboratory   | <input type="checkbox"/> NO             |
| Lameness     | <input type="checkbox"/> NO             |
| Medications  | <input checked="" type="checkbox"/> YES |

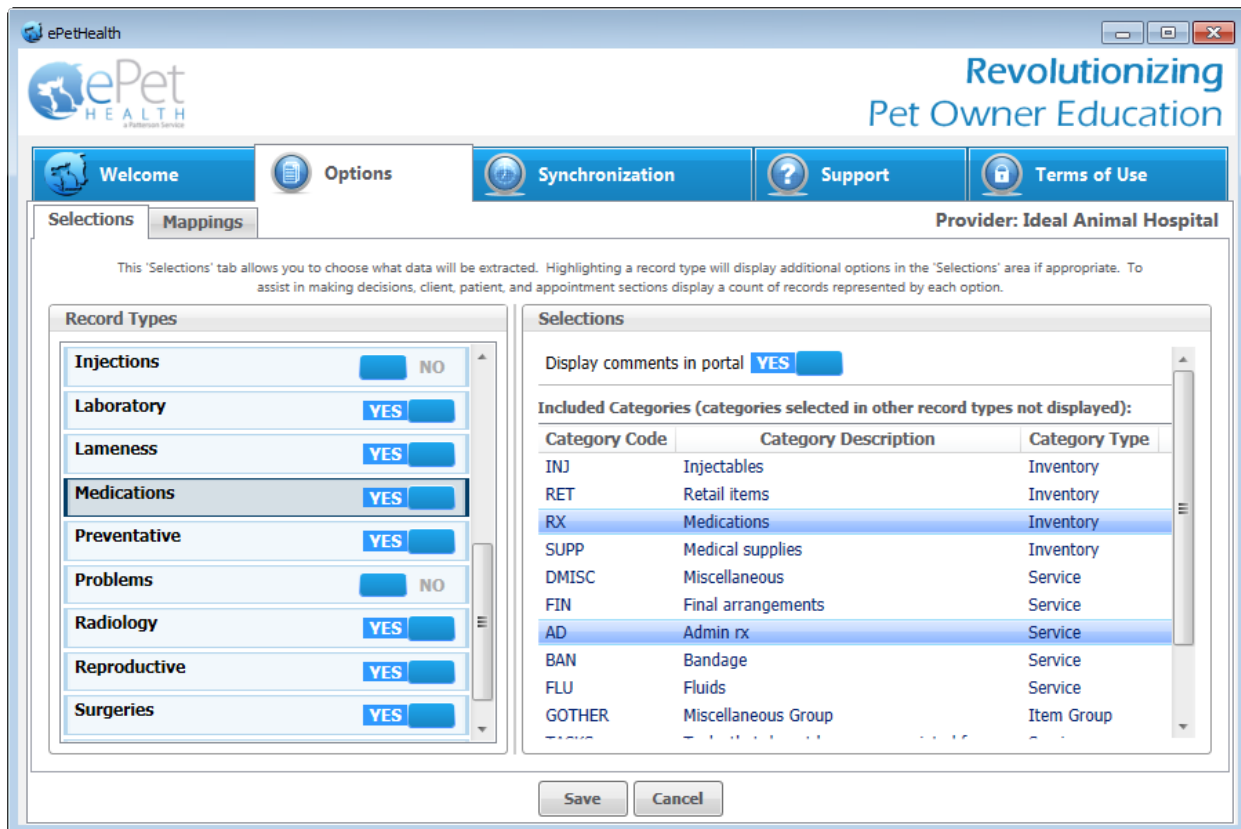
The 'Selections' area on the right contains a red warning icon and the following text: "Setting this selection to NO will decrease the number of automated surveys that are sent."

At the bottom of the window are 'Save' and 'Cancel' buttons.



## 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.



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 Type        | Selection                               |
|--------------------|---|
| Injections         | <input type="checkbox"/> NO             |
| Laboratory         | <input checked="" type="checkbox"/> YES |
| Lameness           | <input checked="" type="checkbox"/> YES |
| <b>Medications</b> | <input checked="" type="checkbox"/> YES |
| Preventative       | <input checked="" type="checkbox"/> YES |
| Problems           | <input type="checkbox"/> NO             |
| Radiology          | <input checked="" type="checkbox"/> YES |
| Reproductive       | <input checked="" type="checkbox"/> YES |
| Surgeries          | <input checked="" type="checkbox"/> YES |

| Category Code | Category Description | Category Type    |
|---------------|----------------------|------------------|
| INJ           | Injectables          | Inventory        |
| RET           | Retail items         | Inventory        |
| <b>RX</b>     | <b>Medications</b>   | <b>Inventory</b> |
| SUPP          | Medical supplies     | Inventory        |
| DMISC         | Miscellaneous        | Service          |
| FIN           | Final arrangements   | Service          |
| <b>AD</b>     | <b>Admin rx</b>      | <b>Service</b>   |
| BAN           | Bandage              | Service          |
| FLU           | Fluids               | Service          |
| GOTHER        | Miscellaneous Group  | Item Group       |

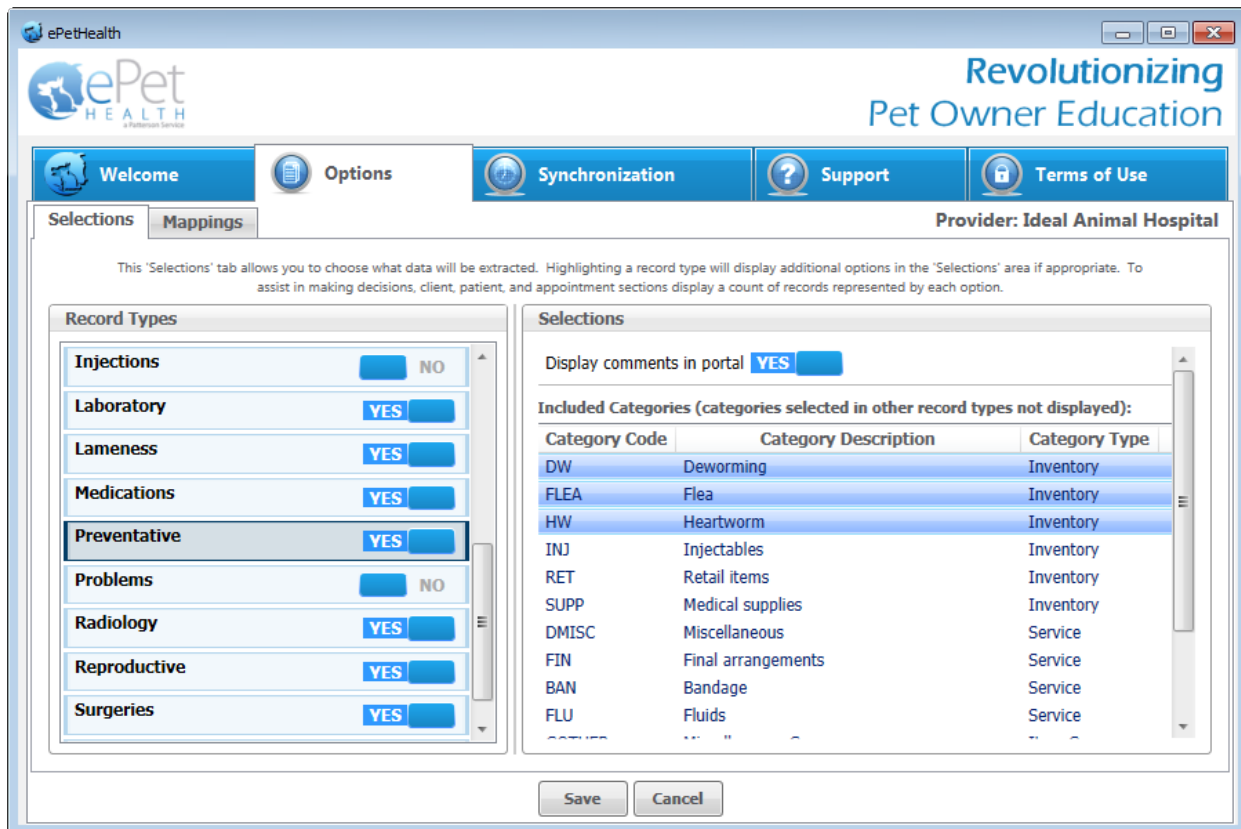
Display comments in portal  YES

Provider: Ideal Animal Hospital

Buttons: Save, Cancel

## 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.



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.

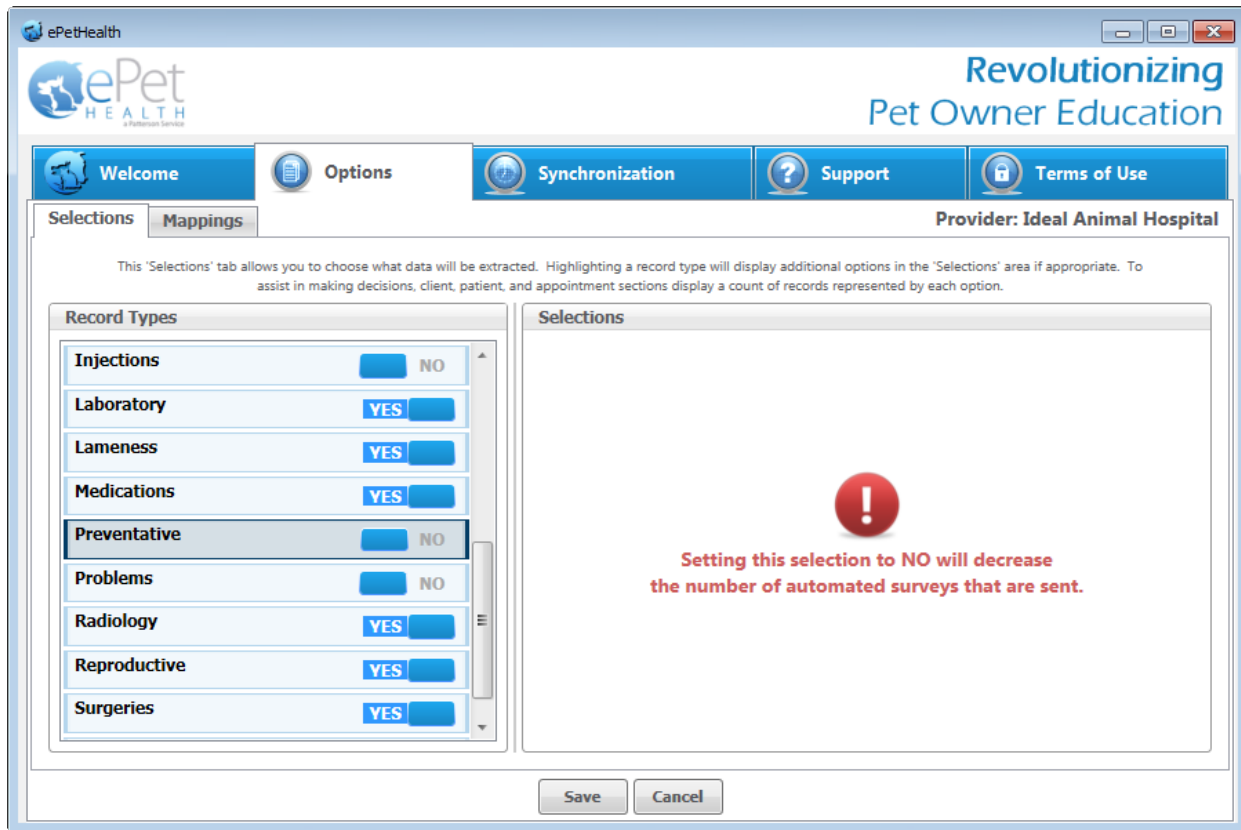
| Record Type         | Selection  |
|---------------------|------------|
| Injections          | NO         |
| Laboratory          | YES        |
| Lameness            | YES        |
| Medications         | YES        |
| <b>Preventative</b> | <b>YES</b> |
| Problems            | NO         |
| Radiology           | YES        |
| Reproductive        | YES        |
| Surgeries           | YES        |

| Category Code | Category Description | Category Type |
|---------------|----------------------|---------------|
| DW            | Deworming            | Inventory     |
| FLEA          | Flea                 | Inventory     |
| HW            | Heartworm            | Inventory     |
| INJ           | Injectables          | Inventory     |
| RET           | Retail items         | Inventory     |
| SUPP          | Medical supplies     | Inventory     |
| DMISC         | Miscellaneous        | Service       |
| FIN           | Final arrangements   | Service       |
| BAN           | Bandage              | Service       |
| FLU           | Fluids               | Service       |

Display comments in portal: YES

Save Cancel



The screenshot shows the 'ePetHealth' application window. The title bar reads 'ePetHealth'. The main header area contains the ePet Health logo on the left and the text 'Revolutionizing Pet Owner Education' on the right. Below the header is a navigation bar with buttons for 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The 'Options' button is active. Underneath, there are tabs for 'Selections' and 'Mappings', with 'Selections' selected. The text 'Provider: Ideal Animal Hospital' is displayed on the right side of the main content area.

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        | Selections                              |
|---------------------|---|
| Injections          | <input type="checkbox"/> NO             |
| Laboratory          | <input checked="" type="checkbox"/> YES |
| Lameness            | <input checked="" type="checkbox"/> YES |
| Medications         | <input checked="" type="checkbox"/> YES |
| <b>Preventative</b> | <input type="checkbox"/> NO             |
| Problems            | <input type="checkbox"/> NO             |
| Radiology           | <input checked="" type="checkbox"/> YES |
| Reproductive        | <input checked="" type="checkbox"/> YES |
| Surgeries           | <input checked="" type="checkbox"/> YES |

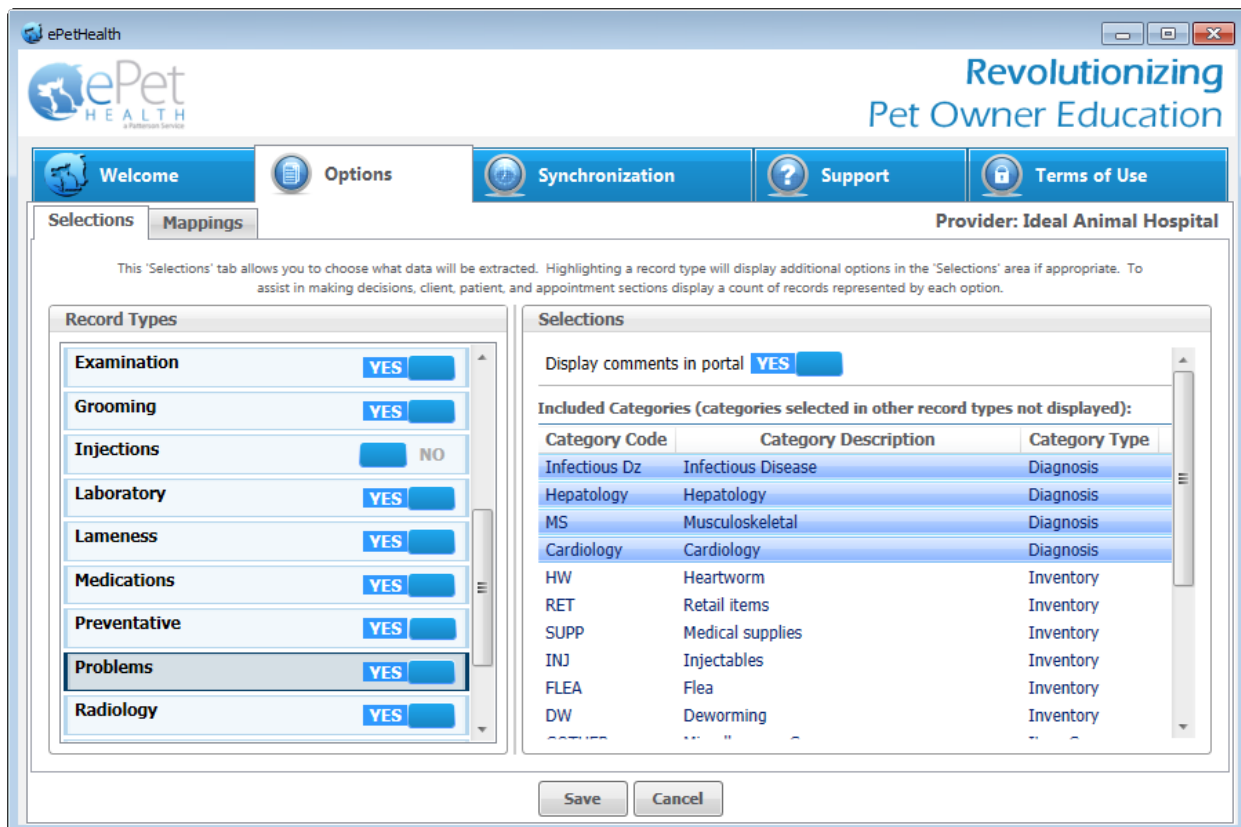
The 'Preventative' record type is highlighted in the table. To the right of the table, a red warning icon is displayed above the following text:

**Setting this selection to NO will decrease the number of automated surveys that are sent.**

At the bottom of the window, there are 'Save' and 'Cancel' buttons.

## 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.



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 Type  | Selection |
|--------------|-----------|
| Examination  | YES       |
| Grooming     | YES       |
| Injections   | NO        |
| Laboratory   | YES       |
| Lameness     | YES       |
| Medications  | YES       |
| Preventative | YES       |
| Problems     | YES       |
| Radiology    | YES       |

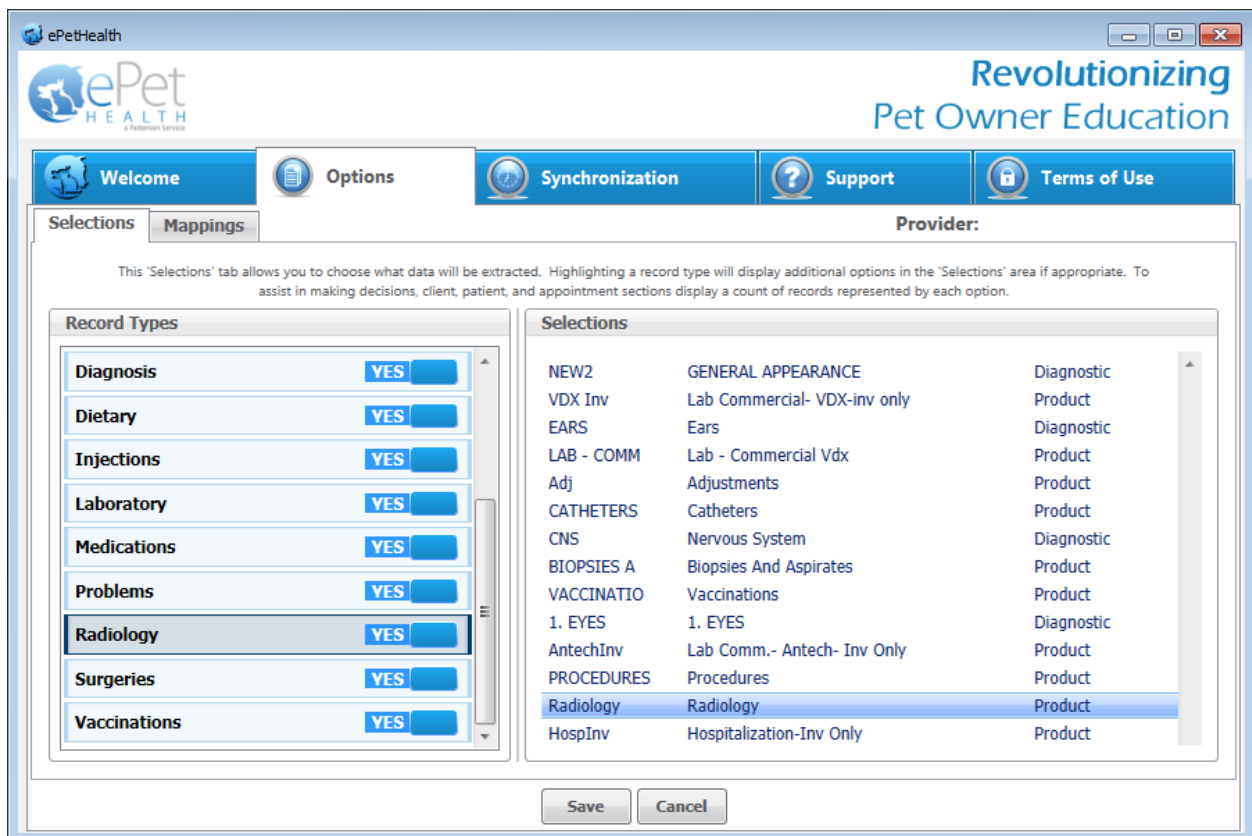
Display comments in portal **YES**

| Category Code | Category Description | Category Type |
|---------------|----------------------|---------------|
| Infectious Dz | Infectious Disease   | Diagnosis     |
| Hepatology    | Hepatology           | Diagnosis     |
| MS            | Musculoskeletal      | Diagnosis     |
| Cardiology    | Cardiology           | Diagnosis     |
| HW            | Heartworm            | Inventory     |
| RET           | Retail items         | Inventory     |
| SUPP          | Medical supplies     | Inventory     |
| INJ           | Injectables          | Inventory     |
| FLEA          | Flea                 | Inventory     |
| DW            | Deworming            | Inventory     |

Save Cancel

## 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.



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   | Selections                                    |
|--|---|
| Diagnosis <input checked="" type="checkbox"/>        | NEW2 GENERAL APPEARANCE Diagnostic            |
| Dietary <input checked="" type="checkbox"/>          | VDX Inv Lab Commercial- VDX-inv only Product  |
| Injections <input checked="" type="checkbox"/>       | EARS Ears Diagnostic                          |
| Laboratory <input checked="" type="checkbox"/>       | LAB - COMM Lab - Commercial Vdx Product       |
| Medications <input checked="" type="checkbox"/>      | Adj Adjustments Product                       |
| Problems <input checked="" type="checkbox"/>         | CATHETERS Catheters Product                   |
| <b>Radiology <input checked="" type="checkbox"/></b> | CNS Nervous System Diagnostic                 |
| Surgeries <input checked="" type="checkbox"/>        | BIOPSIES A Biopsies And Aspirates Product     |
| Vaccinations <input checked="" type="checkbox"/>     | VACCINATIO Vaccinations Product               |
|  | 1. EYES 1. EYES Diagnostic                    |
|  | AntechInv Lab Comm.- Antech- Inv Only Product |
|  | PROCEDURES Procedures Product                 |
|  | <b>Radiology Radiology Product</b>            |
|  | HospInv Hospitalization-Inv Only Product      |

Save Cancel



## Revolutionizing Pet Owner Education

Welcome

Options

Synchronization

Support

Terms of Use

**Provider:**

Selections
Mappings

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 |

!

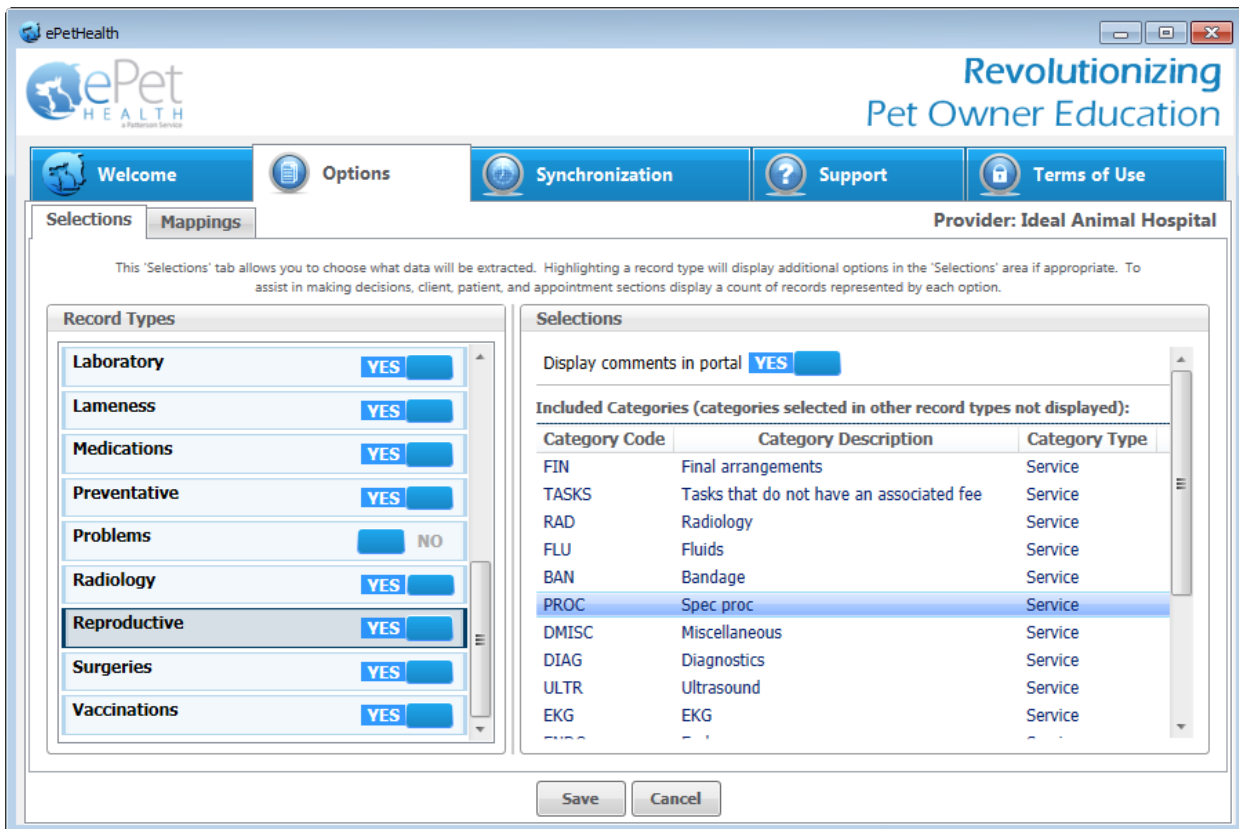
Setting this selection to NO will decrease the number of automated surveys that are sent.

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.



The screenshot shows the 'Selections' configuration window in the ePetHealth application. The window title is 'ePetHealth' and the subtitle is 'Revolutionizing Pet Owner Education'. The provider is identified as 'Ideal Animal Hospital'. The 'Record Types' section on the left has 'Reproductive' selected with a 'YES' button. The 'Selections' section on the right has 'Display comments in portal' set to 'YES'. Below this is a table of 'Included Categories'.

| Category Code | Category Description                     | Category Type |
|---------------|--|---------------|
| FIN           | Final arrangements                       | Service       |
| TASKS         | Tasks that do not have an associated fee | Service       |
| RAD           | Radiology                                | Service       |
| FLU           | Fluids                                   | Service       |
| BAN           | Bandage                                  | Service       |
| PROC          | Spec proc                                | Service       |
| DMISC         | Miscellaneous                            | Service       |
| DIAG          | Diagnostics                              | Service       |
| ULTR          | Ultrasound                               | Service       |
| EKG           | EKG                                      | Service       |



## Revolutionizing Pet Owner Education

Provider: Ideal Animal Hospital

Welcome

Options

Synchronization

Support

Terms of Use

Selections

Mappings

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 |

!

Setting this selection to NO will decrease  
the number of automated surveys that are sent.

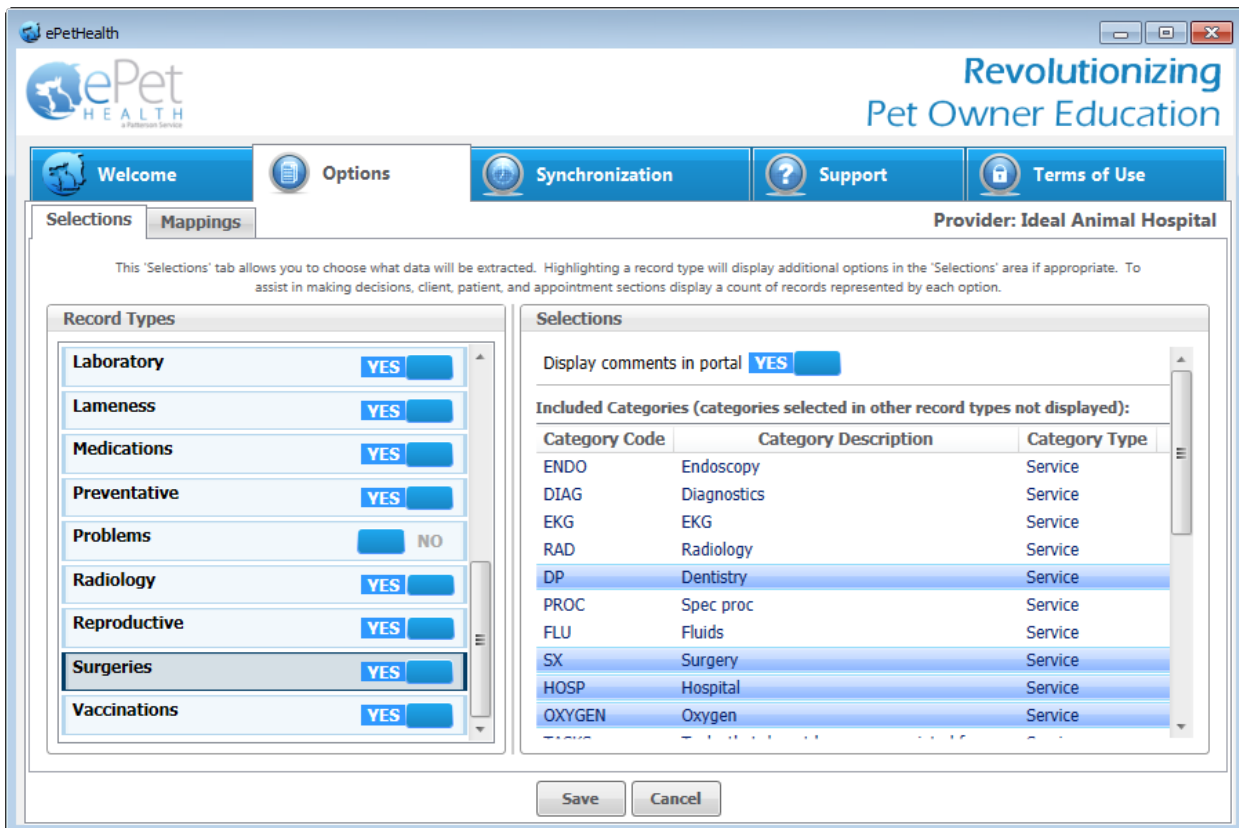
Save

Cancel



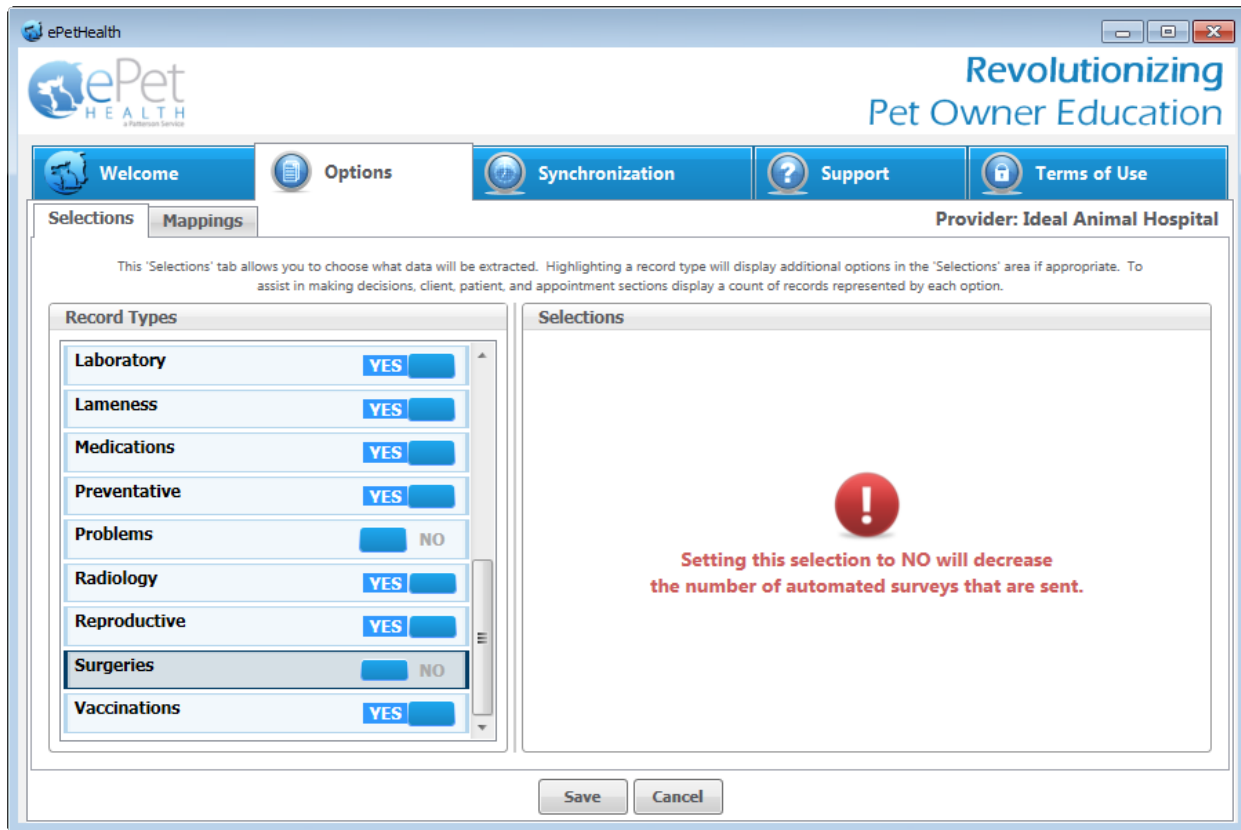
## Surgeries Selections

- 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.



The screenshot shows the 'ePetHealth' application window with the 'Revolutionizing Pet Owner Education' banner. The 'Options' menu is open, and the 'Selections' tab is active. The provider is identified as 'Ideal Animal Hospital'. A message explains that the 'Selections' tab allows users to choose what data will be extracted. The 'Record Types' section shows 'Surgeries' selected with a 'YES' button. The 'Selections' section includes a 'Display comments in portal' checkbox (checked) and a table of 'Included Categories'.

| Category Code | Category Description | Category Type |
|---------------|----------------------|---------------|
| ENDO          | Endoscopy            | Service       |
| DIAG          | Diagnostics          | Service       |
| EKG           | EKG                  | Service       |
| RAD           | Radiology            | Service       |
| DP            | Dentistry            | Service       |
| PROC          | Spec proc            | Service       |
| FLU           | Fluids               | Service       |
| SX            | Surgery              | Service       |
| HOSP          | Hospital             | Service       |
| OXYGEN        | Oxygen               | Service       |



The screenshot shows the 'ePetHealth' application window. The title bar reads 'ePetHealth'. The main header area contains the ePet Health logo on the left and the text 'Revolutionizing Pet Owner Education' on the right. Below the header is a navigation bar with buttons for 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The 'Options' button is active, and the 'Selections' sub-tab is selected. The provider name 'Ideal Animal Hospital' is displayed in the top right corner of the main content area.

A descriptive text block states: '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.'

The 'Record Types' section contains a list of categories with corresponding 'YES' or 'NO' toggle buttons:

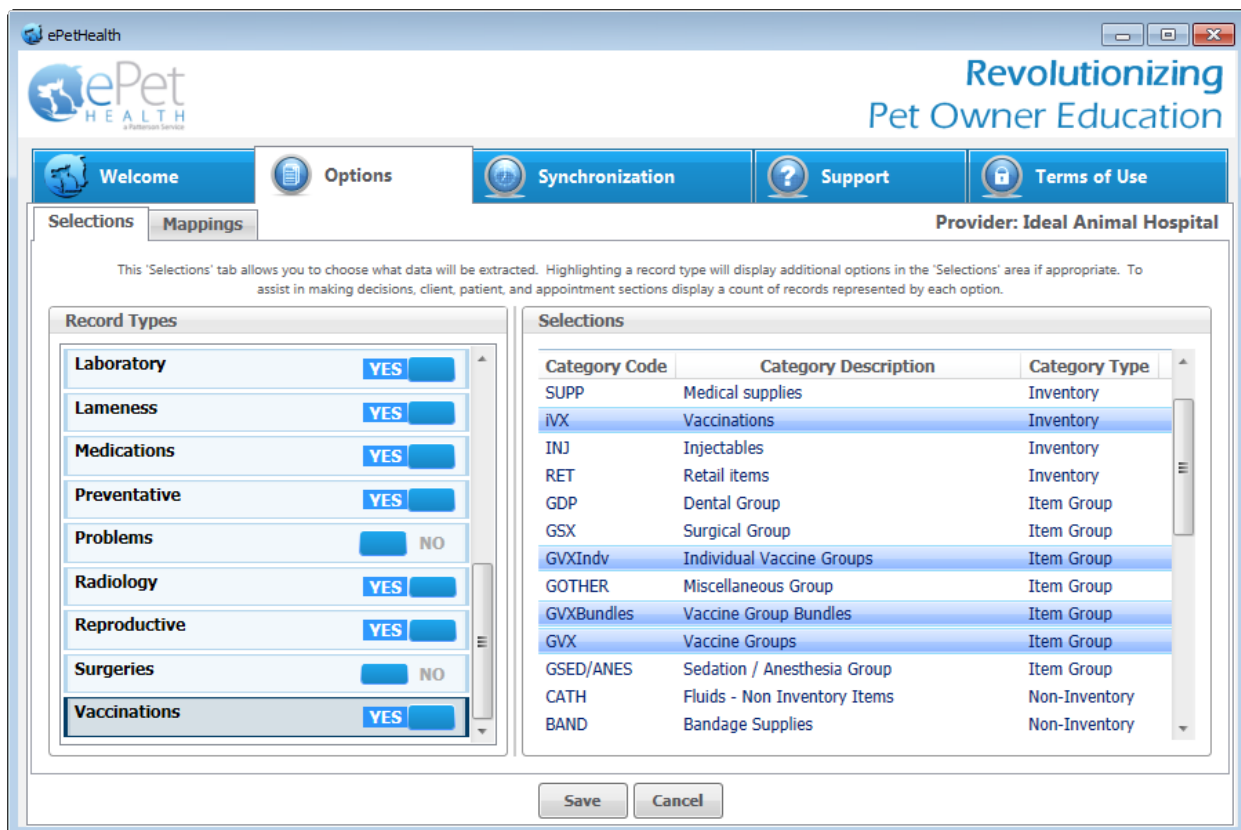
| Record Type  | Selection |
|--------------|-----------|
| Laboratory   | YES       |
| Lameness     | YES       |
| Medications  | YES       |
| Preventative | YES       |
| Problems     | NO        |
| Radiology    | YES       |
| Reproductive | YES       |
| Surgeries    | NO        |
| Vaccinations | YES       |

The 'Selections' area on the right contains a red warning icon and the following text: 'Setting this selection to NO will decrease the number of automated surveys that are sent.'

At the bottom of the window are 'Save' and 'Cancel' buttons.

## 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.



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   | Selections   |               |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
|--|--|---------------|----------------------|---------------|------|------------------|-----------|-----|--------------|-----------|-----|-------------|-----------|-----|--------------|-----------|-----|--------------|------------|-----|----------------|------------|---------|---------------------------|------------|--------|---------------------|------------|------------|-----------------------|------------|-----|----------------|------------|-----------|-----------------------------|------------|------|------------------------------|---------------|------|------------------|---------------|
| Laboratory <input checked="" type="checkbox"/> YES   | <table border="1"> <thead> <tr> <th>Category Code</th> <th>Category Description</th> <th>Category Type</th> </tr> </thead> <tbody> <tr><td>SUPP</td><td>Medical supplies</td><td>Inventory</td></tr> <tr><td>IVX</td><td>Vaccinations</td><td>Inventory</td></tr> <tr><td>INJ</td><td>Injectables</td><td>Inventory</td></tr> <tr><td>RET</td><td>Retail items</td><td>Inventory</td></tr> <tr><td>GDP</td><td>Dental Group</td><td>Item Group</td></tr> <tr><td>GSX</td><td>Surgical Group</td><td>Item Group</td></tr> <tr><td>GVXIndv</td><td>Individual Vaccine Groups</td><td>Item Group</td></tr> <tr><td>GOTHER</td><td>Miscellaneous Group</td><td>Item Group</td></tr> <tr><td>GVXBundles</td><td>Vaccine Group Bundles</td><td>Item Group</td></tr> <tr><td>GVX</td><td>Vaccine Groups</td><td>Item Group</td></tr> <tr><td>GSED/ANES</td><td>Sedation / Anesthesia Group</td><td>Item Group</td></tr> <tr><td>CATH</td><td>Fluids - Non Inventory Items</td><td>Non-Inventory</td></tr> <tr><td>BAND</td><td>Bandage Supplies</td><td>Non-Inventory</td></tr> </tbody> </table> | Category Code | Category Description | Category Type | SUPP | Medical supplies | Inventory | IVX | Vaccinations | Inventory | INJ | Injectables | Inventory | RET | Retail items | Inventory | GDP | Dental Group | Item Group | GSX | Surgical Group | Item Group | GVXIndv | Individual Vaccine Groups | Item Group | GOTHER | Miscellaneous Group | Item Group | GVXBundles | Vaccine Group Bundles | Item Group | GVX | Vaccine Groups | Item Group | GSED/ANES | Sedation / Anesthesia Group | Item Group | CATH | Fluids - Non Inventory Items | Non-Inventory | BAND | Bandage Supplies | Non-Inventory |
| Category Code  | Category Description   | Category Type |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| SUPP   | Medical supplies   | Inventory     |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| IVX  | Vaccinations   | Inventory     |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| INJ  | Injectables  | Inventory     |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| RET  | Retail items   | Inventory     |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| GDP  | Dental Group   | Item Group    |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| GSX  | Surgical Group   | Item Group    |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| GVXIndv  | Individual Vaccine Groups  | Item Group    |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| GOTHER   | Miscellaneous Group  | Item Group    |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| GVXBundles   | Vaccine Group Bundles  | Item Group    |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| GVX  | Vaccine Groups   | Item Group    |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| GSED/ANES  | Sedation / Anesthesia Group  | Item Group    |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| CATH   | Fluids - Non Inventory Items   | Non-Inventory |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| BAND   | Bandage Supplies   | Non-Inventory |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| Lameness <input checked="" type="checkbox"/> YES     |  |               |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| Medications <input checked="" type="checkbox"/> YES  |  |               |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| Preventative <input checked="" type="checkbox"/> YES |  |               |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| Problems <input type="checkbox"/> NO                 |  |               |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| Radiology <input checked="" type="checkbox"/> YES    |  |               |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| Reproductive <input checked="" type="checkbox"/> YES |  |               |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| Surgeries <input type="checkbox"/> NO                |  |               |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |
| Vaccinations <input checked="" type="checkbox"/> YES |  |               |                      |               |      |                  |           |     |              |           |     |             |           |     |              |           |     |              |            |     |                |            |         |                           |            |        |                     |            |            |                       |            |     |                |            |           |                             |            |      |                              |               |      |                  |               |

Save Cancel



## Revolutionizing Pet Owner Education

Provider: Ideal Animal Hospital

Welcome

Options

Synchronization

Support

Terms of Use

Selections

Mappings

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  |

!

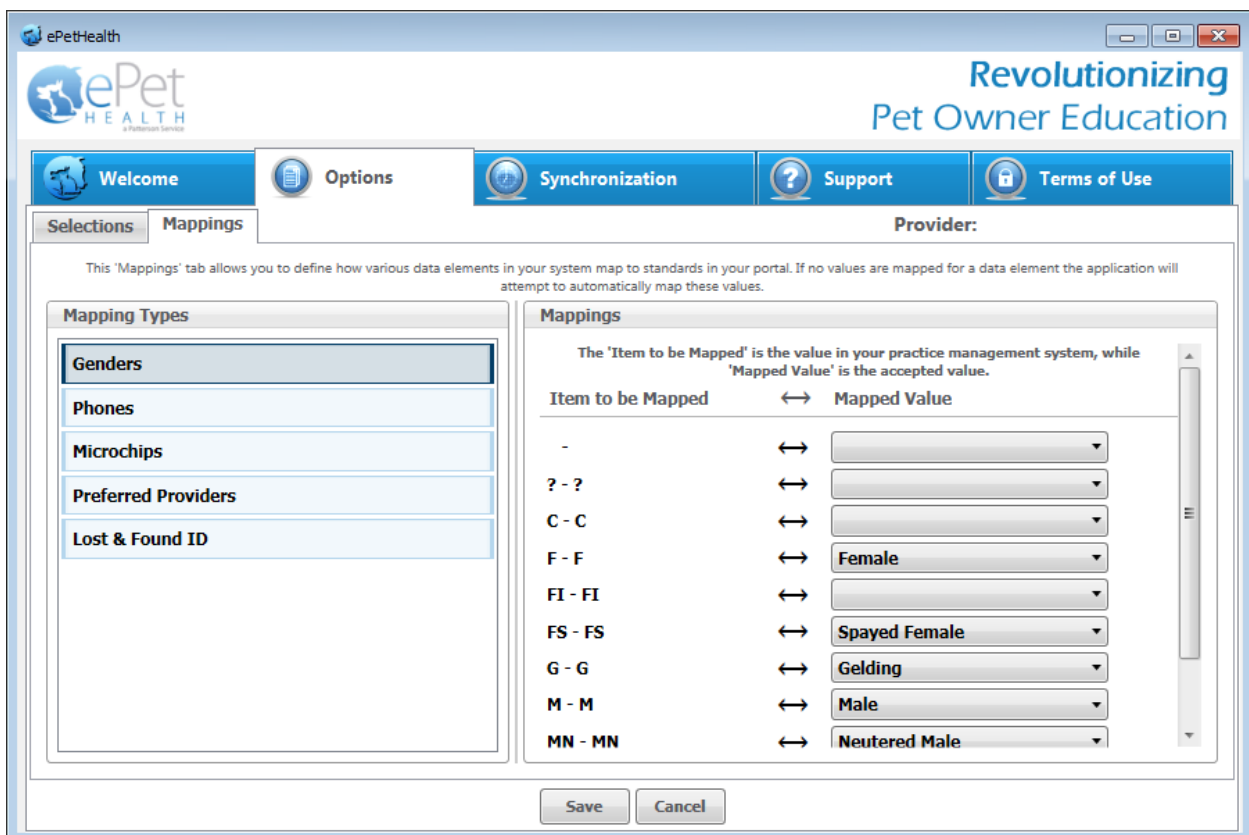
Setting this selection to NO will decrease  
the number of automated surveys that are sent.

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).



The screenshot shows the ePetHealth application window with the 'Mappings' tab selected. The window title is 'ePetHealth' and the header includes the ePet Health logo and the slogan 'Revolutionizing Pet Owner Education'. The navigation bar contains 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The 'Mappings' tab is active, and the 'Provider:' field is empty. A descriptive text states: 'This 'Mappings' tab allows you to define how various data elements in your system map to standards in your portal. If no values are mapped for a data element the application will attempt to automatically map these values.'

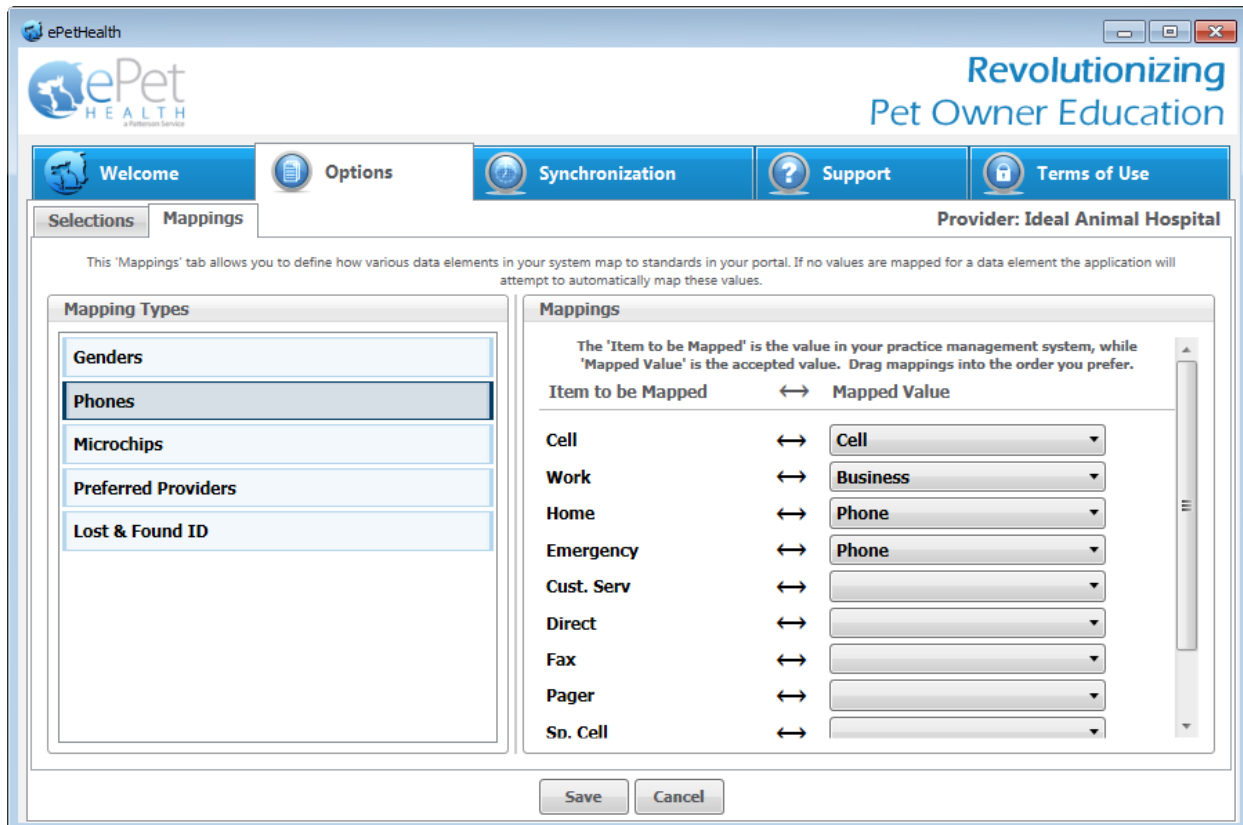
On the left, the 'Mapping Types' list includes: Genders (selected), Phones, Microchips, Preferred Providers, and Lost & Found ID.

The main 'Mappings' area contains a table with the following columns: 'Item to be Mapped', a bidirectional arrow, and 'Mapped Value'. The table lists the following mappings:

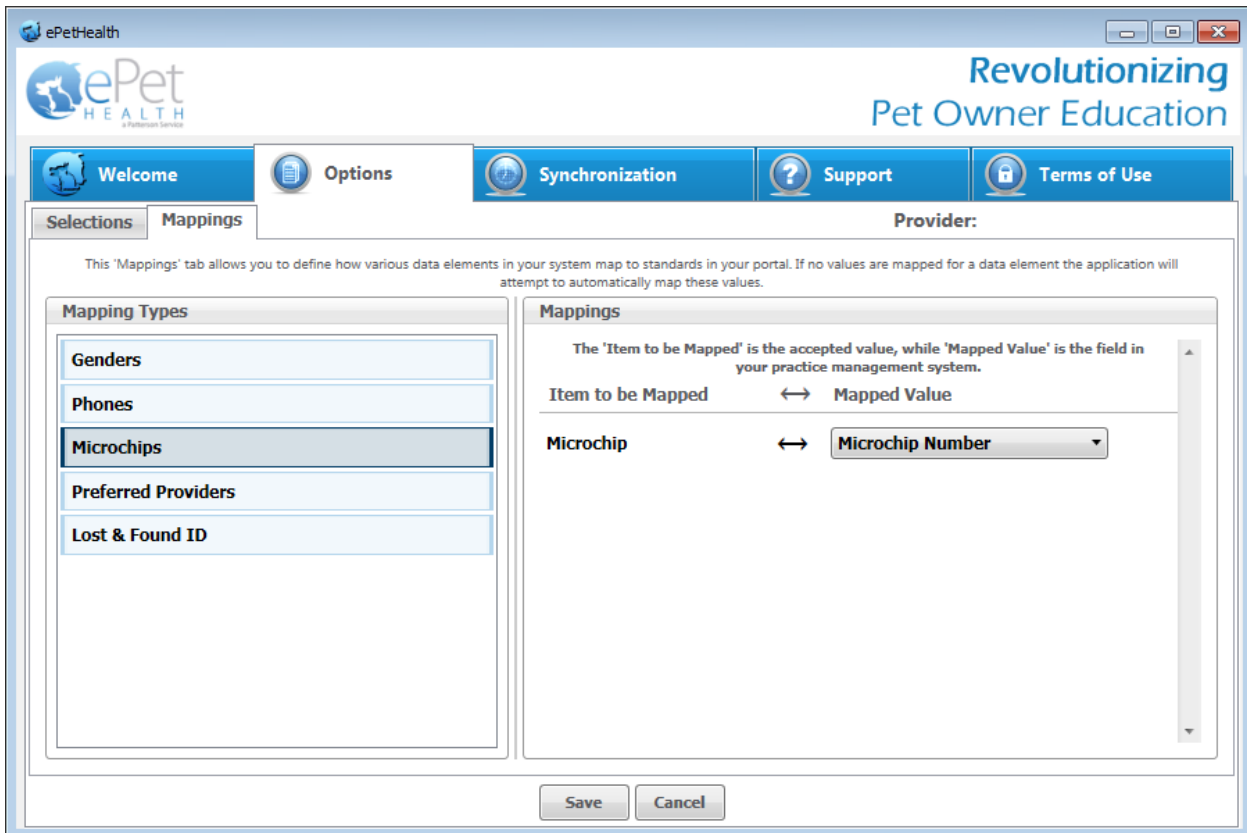
| Item to be Mapped | ↔ | Mapped Value  |
|-------------------|---|---------------|
| -                 | ↔ | [Dropdown]    |
| ? - ?             | ↔ | [Dropdown]    |
| C - C             | ↔ | [Dropdown]    |
| F - F             | ↔ | Female        |
| FI - FI           | ↔ | [Dropdown]    |
| FS - FS           | ↔ | Spayed Female |
| G - G             | ↔ | Gelding       |
| M - M             | ↔ | Male          |
| MN - MN           | ↔ | Neutered Male |

At the bottom of the window are 'Save' and 'Cancel' buttons.

- 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).

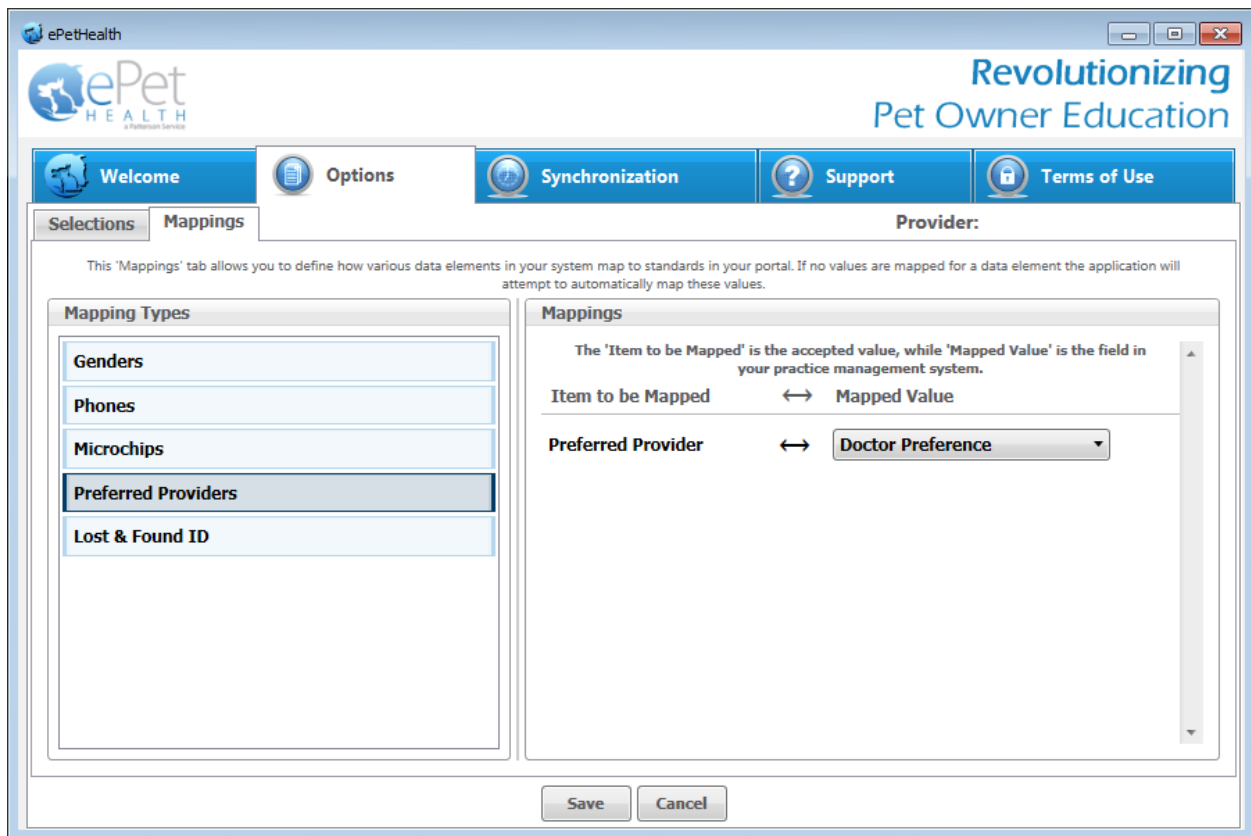


- Microchips:
  - The 'Item to be Mapped' is the accepted value in the ePetHealth portal.
  - The 'Mapped Value' is the value in the Practice Management System.
  - Mapped Values can be left blank if the corresponding Item to be Mapped is not to be shown in the Client Portal.
  - By default, no field is mapped for Microchips for ClientTrax 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.



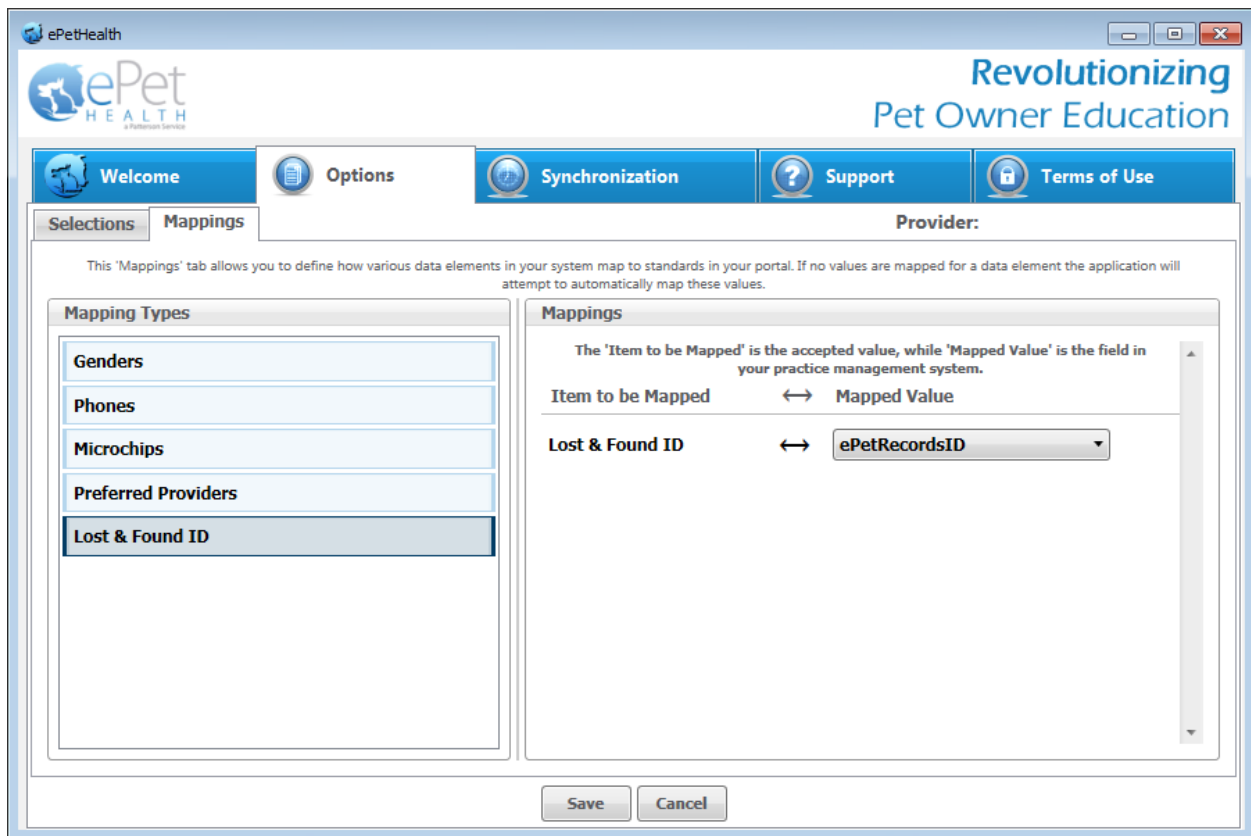
The screenshot shows the 'Mappings' configuration screen in the ePetHealth portal. The interface includes a navigation bar with 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. Below this, there are tabs for 'Selections' and 'Mappings', with 'Mappings' currently selected. A 'Provider:' label is visible on the right. The main content area contains a descriptive paragraph: 'This 'Mappings' tab allows you to define how various data elements in your system map to standards in your portal. If no values are mapped for a data element the application will attempt to automatically map these values.' On the left, a 'Mapping Types' sidebar lists 'Genders', 'Phones', 'Microchips' (which is selected), 'Preferred Providers', and 'Lost & Found ID'. The main 'Mappings' area contains a header: 'The 'Item to be Mapped' is the accepted value, while 'Mapped Value' is the field in your practice management system.' Below this, there are two rows of mapping configuration. The first row shows 'Item to be Mapped' and 'Mapped Value' with a double-headed arrow between them. The second row shows 'Microchip' mapped to a dropdown menu labeled 'Microchip Number'. At the bottom of the screen, there are 'Save' and 'Cancel' buttons.

- 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 ClenTrax 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>



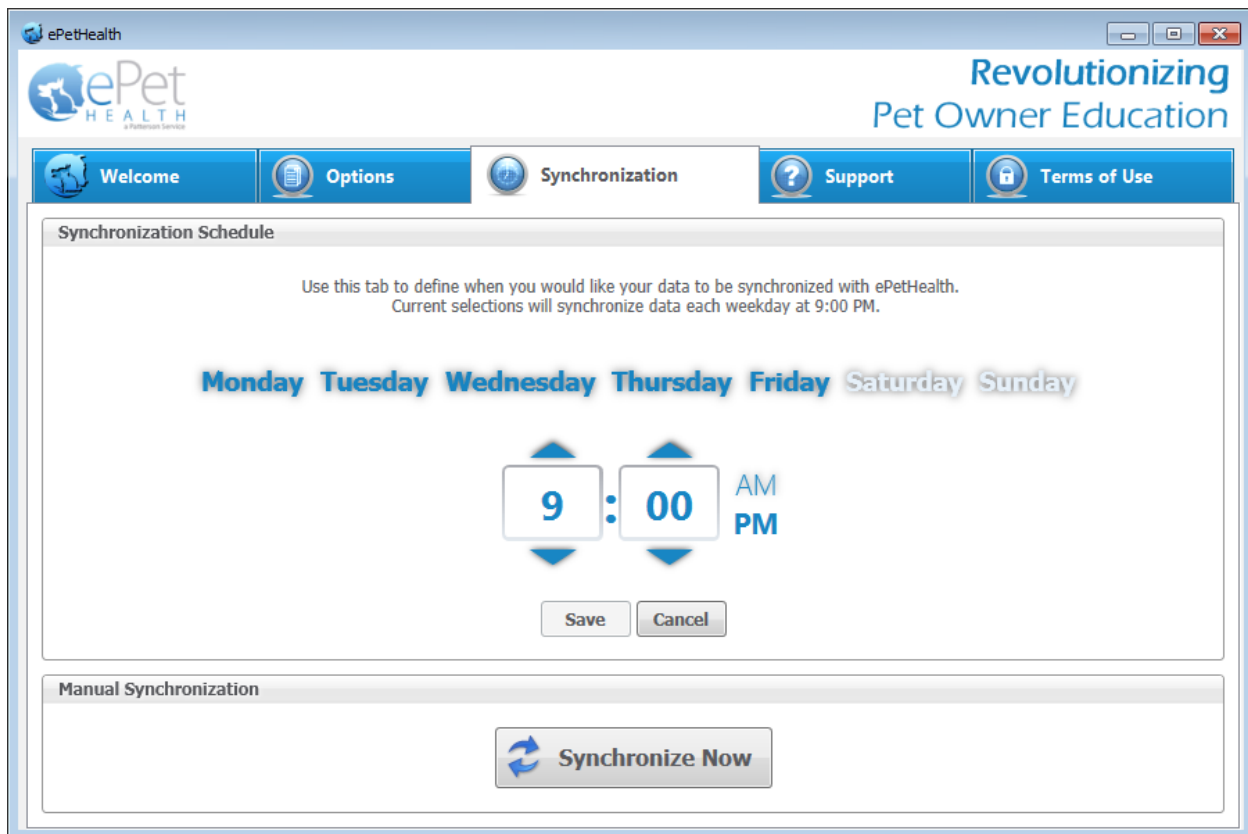
## Synchronization

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.



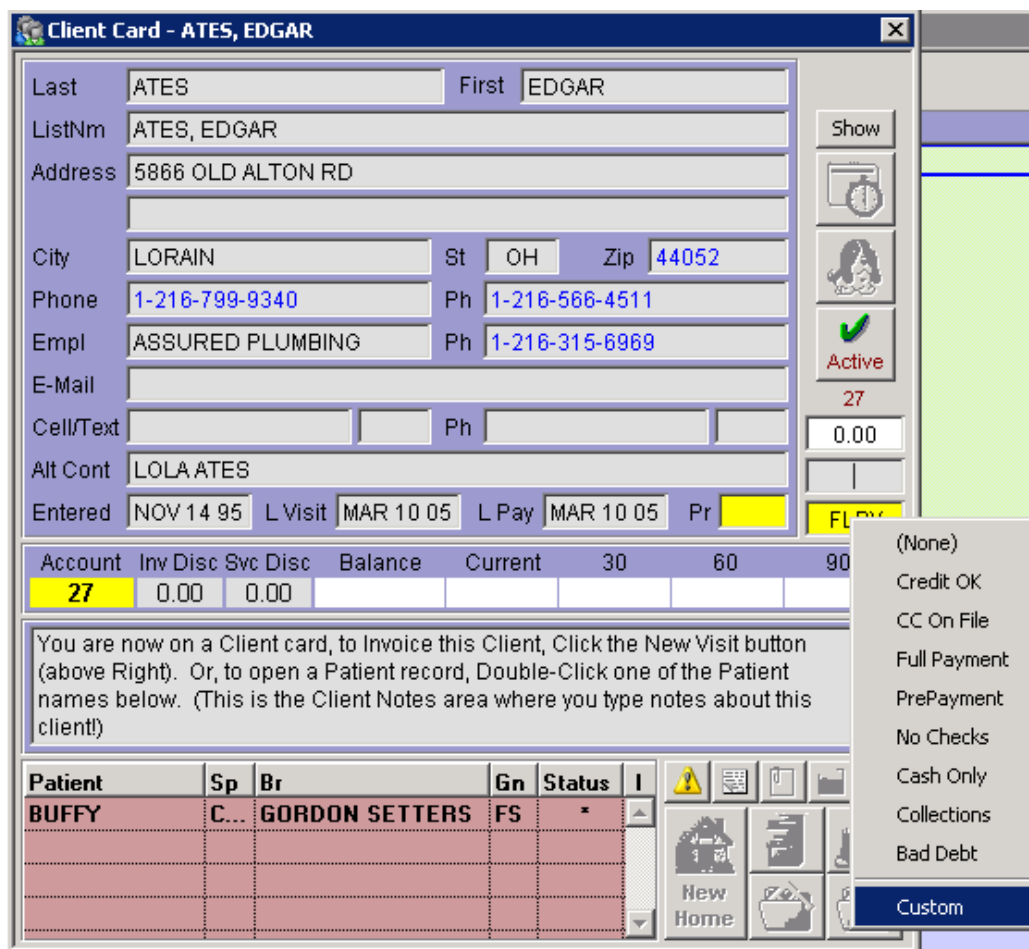
The screenshot shows the ePetHealth application window with the 'Synchronization' tab selected. The interface includes a navigation bar with 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The main content area is titled 'Synchronization Schedule' and contains the following text: 'Use this tab to define when you would like your data to be synchronized with ePetHealth. Current selections will synchronize data each weekday at 9:00 PM.' Below this text are seven days of the week: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. The days Monday through Friday are highlighted in blue, indicating they are selected for synchronization. Below the days is a time selection interface with a digital clock showing '9 : 00' and a dropdown menu currently set to 'AM'. Below the time selection are 'Save' and 'Cancel' buttons. At the bottom of the window, there is a 'Manual Synchronization' section with a 'Synchronize Now' button.

## ClientTrax Filter Data

### Client Type

ClientTrax 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 Card - ATES, EDGAR**

Last: ATES First: EDGAR  
 ListNm: ATES, EDGAR  
 Address: 5866 OLD ALTON RD  
 City: LORAIN St: OH Zip: 44052  
 Phone: 1-216-799-9340 Ph: 1-216-566-4511  
 Empl: ASSURED PLUMBING Ph: 1-216-315-6969  
 E-Mail:  
 Cell/Text: Ph:  
 Alt Cont: LOLA ATES  
 Entered: NOV 14 95 L Visit: MAR 10 05 L Pay: MAR 10 05 Pr: **FL**

| Account   | Inv Disc | Svc Disc | Balance | Current | 30 | 60 | 90 |
|-----------|----------|----------|---------|---------|----|----|----|
| <b>27</b> | 0.00     | 0.00     |         |         |    |    |    |

You are now on a Client card, to invoice this Client, Click the New Visit button (above Right). Or, to open a Patient record, Double-Click one of the Patient names below. (This is the Client Notes area where you type notes about this client!)

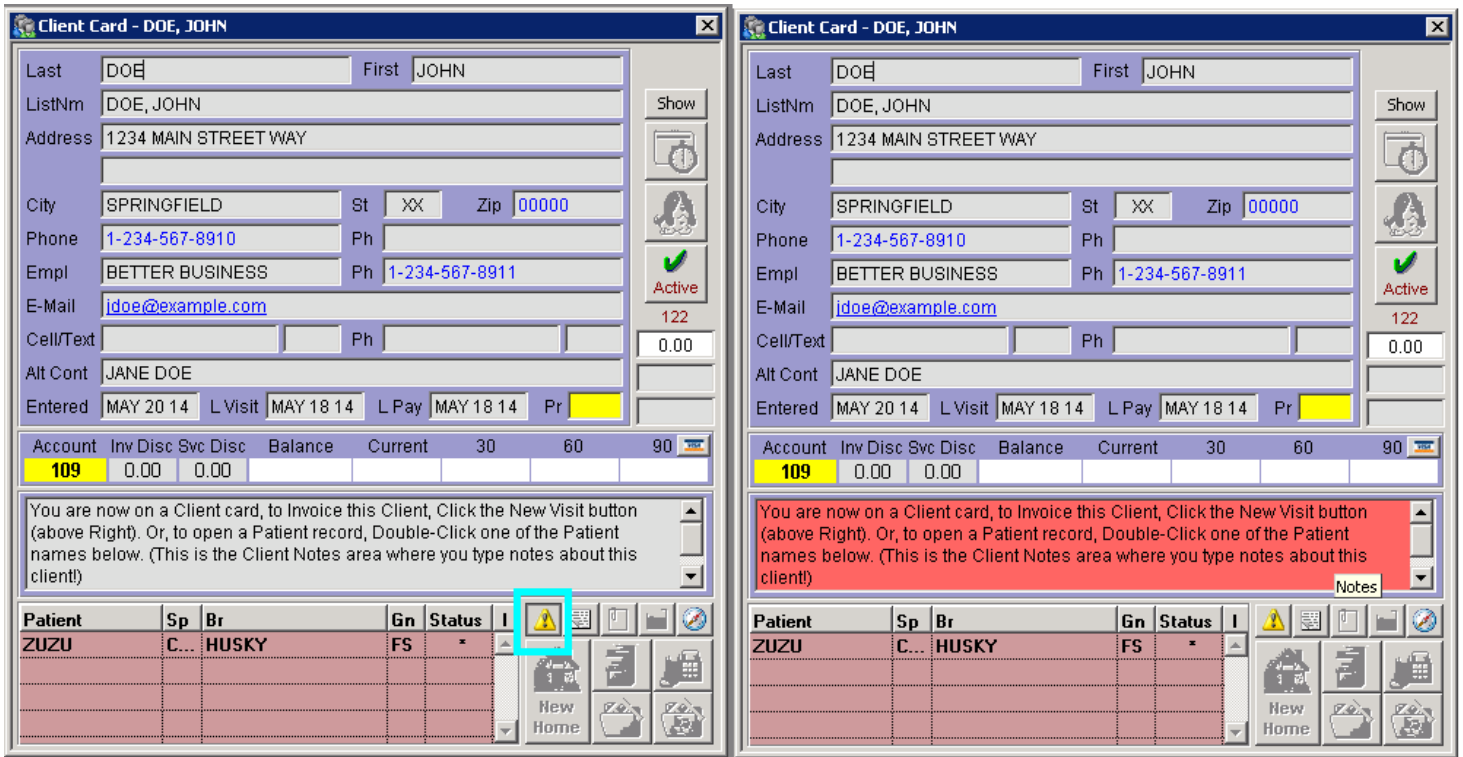
| Patient      | Sp   | Br                    | Gn | Status | I |
|--------------|------|-----------------------|----|--------|---|
| <b>BUFFY</b> | C... | <b>GORDON SETTERS</b> | FS | *      |   |

Dropdown menu options:

- (None)
- Credit OK
- CC On File
- Full Payment
- PrePayment
- No Checks
- Cash Only
- Collections
- Bad Debt
- Custom**

## 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.



The image displays two screenshots of the 'Client Card - DOE, JOHN' interface. Both screenshots show the same client information, including contact details, address, and account status. The primary difference is the color of the alert box in the bottom right corner of the patient list table.

**Left Screenshot (Yellow Alert):** The alert box is yellow. A red box highlights the yellow warning icon in the patient list table.

**Right Screenshot (Red Alert):** The alert box is red. The warning icon in the patient list table is also red.

**Client Information:**

- Last: DOE, First: JOHN
- ListNm: DOE, JOHN
- Address: 1234 MAIN STREET WAY
- City: SPRINGFIELD, St: XX, Zip: 00000
- Phone: 1-234-567-8910
- Empl: BETTER BUSINESS, Ph: 1-234-567-8911
- E-Mail: jdoe@example.com
- Alt Cont: JANE DOE
- Entered: MAY 20 14, L Visit: MAY 18 14, L Pay: MAY 18 14, Pr: [Yellow]

**Account Information:**

| Account | Inv Disc | Svc Disc | Balance | Current | 30 | 60 | 90 |
|---------|----------|----------|---------|---------|----|----|----|
| 109     | 0.00     | 0.00     |         |         |    |    |    |

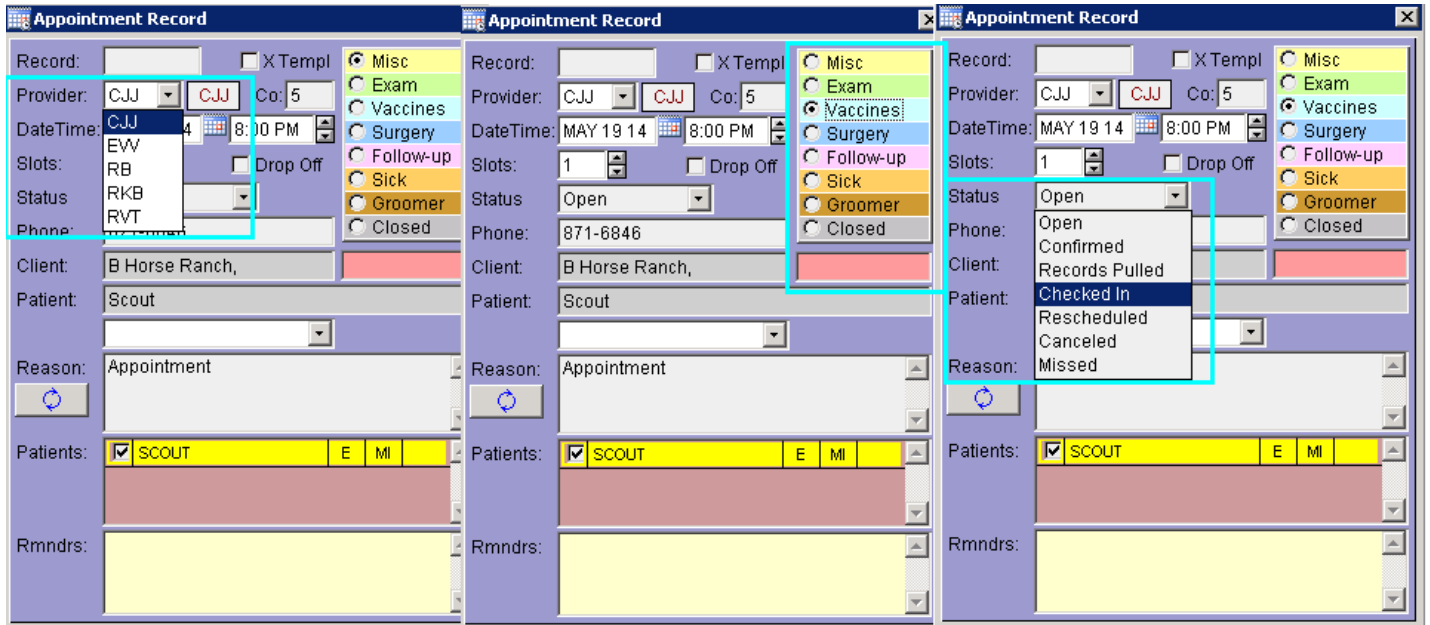
**Notes:** You are now on a Client card, to Invoice this Client, Click the New Visit button (above Right). Or, to open a Patient record, Double-Click one of the Patient names below. (This is the Client Notes area where you type notes about this client!)

**Patient List Table:**

| Patient | Sp   | Br    | Gn | Status | I            |
|---------|------|-------|----|--------|--------------|
| ZUZU    | C... | HUSKY | FS | *      | [Alert Icon] |

## 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.



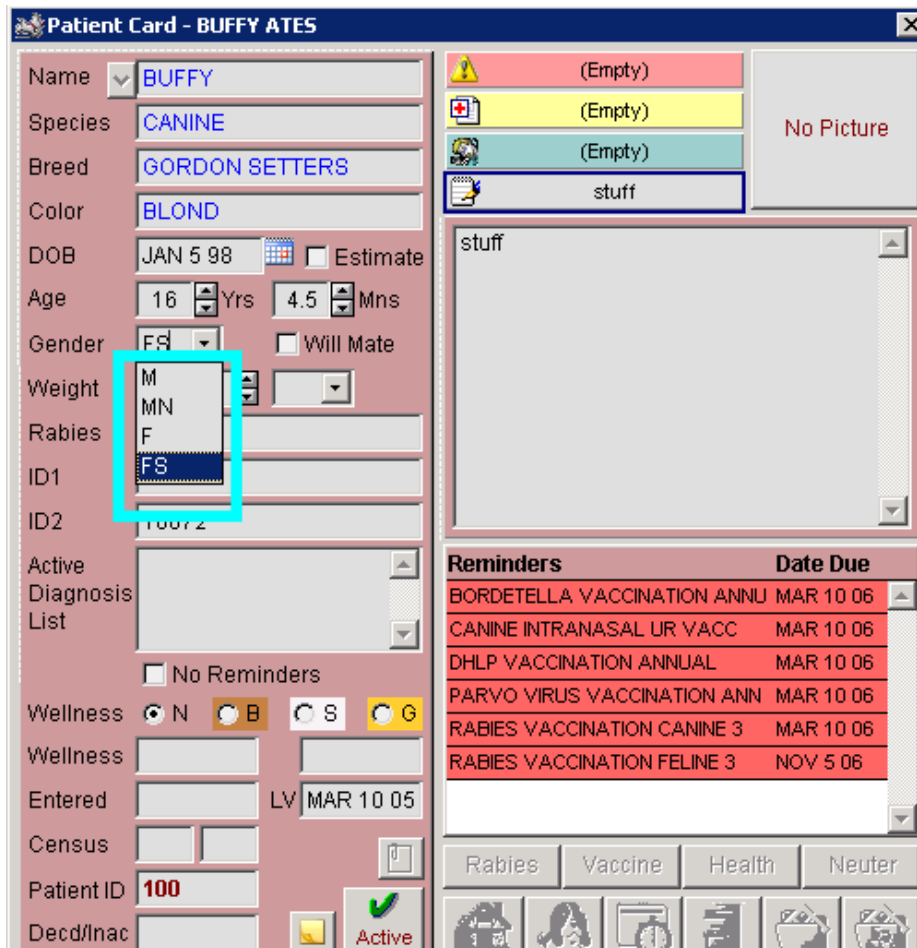
The image displays three sequential screenshots of the 'Appointment Record' form, illustrating how different fields are filtered. Each window shows the same appointment details: Client 'B Horse Ranch', Patient 'Scout', Reason 'Appointment', and a patient list with 'SCOUT' checked. The filtering is applied to the 'Record' field.

- Left Window:** The 'Record' field is filtered by 'Provider'. The dropdown menu is open, showing options: EW, RB, RKB, and RVT. The 'Misc' radio button is selected.
- Middle Window:** The 'Record' field is filtered by 'Type'. The dropdown menu is open, showing options: Exam, Vaccines, Surgery, Follow-up, Sick, Groomer, and Closed. The 'Vaccines' radio button is selected.
- Right Window:** The 'Record' field is filtered by 'Status'. The dropdown menu is open, showing options: Open, Confirmed, Records Pulled, Checked In, Rescheduled, Canceled, and Missed. The 'Open' status is selected.

## ClenTrax Mapping Data

### Patient Gender

In ClenTrax, 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.



**Patient Card - BUFFY ATEs**

Name: BUFFY  
Species: CANINE  
Breed: GORDON SETTERS  
Color: BLOND  
DOB: JAN 5 98  
Age: 16 Yrs 4.5 Mns  
Gender: FS  
Weight:   
Rabies: F  
ID1:   
ID2: 10072  
Active:   
Diagnosis List:   
Wellness: N B S G  
Entered: LV MAR 10 05  
Census:   
Patient ID: 100  
Decd/Inac:   
Active

(Empty)  
(Empty)  
(Empty)  
stuff

stuff

| Reminders                   | Date Due  |
|-----------------------------|-----------|
| BORDETELLA VACCINATION ANNU | MAR 10 06 |
| CANINE INTRANASAL UR VACC   | MAR 10 06 |
| DHLP VACCINATION ANNUAL     | MAR 10 06 |
| PARVO VIRUS VACCINATION ANN | MAR 10 06 |
| RABIES VACCINATION CANINE 3 | MAR 10 06 |
| RABIES VACCINATION FELINE 3 | NOV 5 06  |

Rabies Vaccine Health Neuter

## Preferred Provider

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

**Client Card - DOE, JOHN**

|           |                      |         |  |
|-----------|----------------------|---------|--|
| Last      | DOE                  | First   | JOHN                                   |
| ListNm    | DOE, JOHN            |         |  |
| Address   | 1234 MAIN STREET WAY |         |  |
| City      | SPRINGFIELD          | St      | XX Zip 00000                           |
| Phone     | 1-234-567-8910       | Ph      |  |
| Empl      | BETTER BUSINESS      | Ph      | 1-234-567-8911                         |
| E-Mail    | jdoe@example.com     |         |  |
| Cell/Text |                      | Ph      |  |
| Alt Cont  | JANE DOE             |         |  |
| Entered   | MAY 20 14            | L Visit | MAY 18 14 L Pay MAY 18 14 Pr <b>CJ</b> |

|            |          |          |         |         |    |    |    |
|------------|----------|----------|---------|---------|----|----|----|
| Account    | Inv Disc | Svc Disc | Balance | Current | 30 | 60 | 90 |
| <b>109</b> | 0.00     | 0.00     |         |         |    |    |    |

You are now on a Client card, to Invoice this Client, Click the New Visit button (above Right). Or, to open a Patient record, Double-Click one of the Patient names below. (This is the Client Notes area where you type notes about this client!)

| Patient | Sp   | Br    | Gn | Status | I |
|---------|------|-------|----|--------|---|
| ZUZU    | C... | HUSKY | FS | *      |   |
|         |      |       |    |        |   |
|         |      |       |    |        |   |

## Microchip and Lost & Found ID

ClientTrax 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.

**Patient Card - BUFFY ATEs**

Name: BUFFY  
Species: CANINE  
Breed: GORDON SETTERS  
Color: BLOND  
DOB: JAN 5 98  
Age: 16 Yrs 4.5 Mns  
Gender: FS  
Weight: 28  
Rabies: 10114  
ID1: 04-358  
ID2: 10072

Active  
Diagnosis List  
Wellness: N B S G  
Entered: LV MAR 10 05  
Patient ID: 100  
Decd/Inac: Active

Reminders

| Reminders                   | Date Due  |
|-----------------------------|-----------|
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| CANINE INTRANASAL UR VACC   | MAR 10 06 |
| DHLP VACCINATION ANNUAL     | MAR 10 06 |
| PARVO VIRUS VACCINATION ANN | MAR 10 06 |
| RABIES VACCINATION CANINE 3 | MAR 10 06 |
| RABIES VACCINATION FELINE 3 | NOV 5 06  |

Rabies Vaccine Health Neuter