ePetHealth Dashboard
AVImark SQL

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***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.**

Introduction

The ePetHealth dashboard's function is to automate the extraction 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.

Installation & Setup

Click the following link to access the ePetHealth Dashboard installation file:

Setup for ePetHealth

- Run the ePetHealth Setup.exe
- Select AVImark SQL from the PMS Menu
  - All versions of AVImark SQL are supported
- Default Installation Directories:
  - For 32-bit machines, C:\Program Files\ePetHealth
  - For 64-bit machines, C:\Program Files (x86)\ePetHealth

Authentication|Configuration

When prompted, enter the ID and License Key created by Patterson Veterinary to activate the ePetHealth Dashboard in the Authentication Settings area of the Options tab. Additional question mark balloons are located to the right of each header. Simply hover over the question mark to see more details about each section. For AVImark SQL, the Authentication Settings will always require input. Connection Settings allows for entry of path- or server-based settings.

General Settings

- **Enable Record Count Feature:** Will show the record counts of types of exclusions on each Selection.
  - The feature is enabled by default
  - Will save computer memory usage when disabled
- **Use Low Memory Settings:** Will allow the ePetHealth Dashboard to use lower memory settings.
  - The feature is disabled by default
  - Will save computer memory usage when enabled
  - Recommended for lower quality / older hardware

Authentication Settings

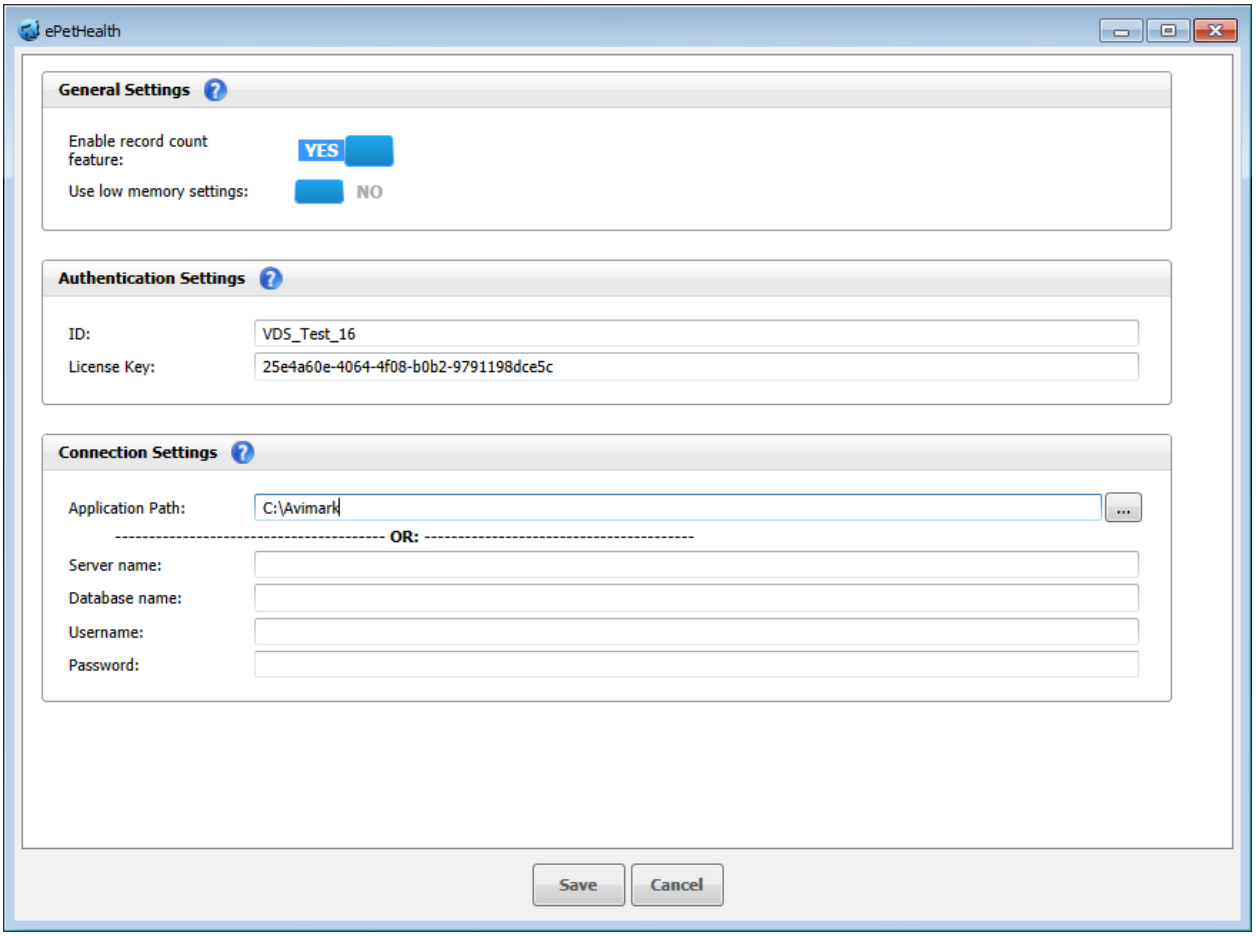
- **ID:** Created by Patterson Veterinary and is required to activate the ePetHealth Dashboard.
- **License Key:** Created by Patterson Veterinary and is required to activate the ePetHealth Dashboard.

Connection Settings

- **Application Path:** Enter the installation path of the Practice Management Software.

*** By default, the dashboard will use Windows authentication; the following settings are not typically needed.**

- **Server name:** Enter the server / workstation name as it appears on the computer that the ePetHealth Dashboard is being installed on.
- **Database name:** Enter the name of the database that the ePetHealth dashboard will extract data from.
- **Username:** The Username required to log into Microsoft SQL Server.
- **Password:** The Password required to log into Microsoft SQL Server.



Functionality

Welcome

The Welcome tab displays several features that the ePetHealth dashboard offers and provides pertinent information to the end-user. This tab will be updated periodically as features change.

Options

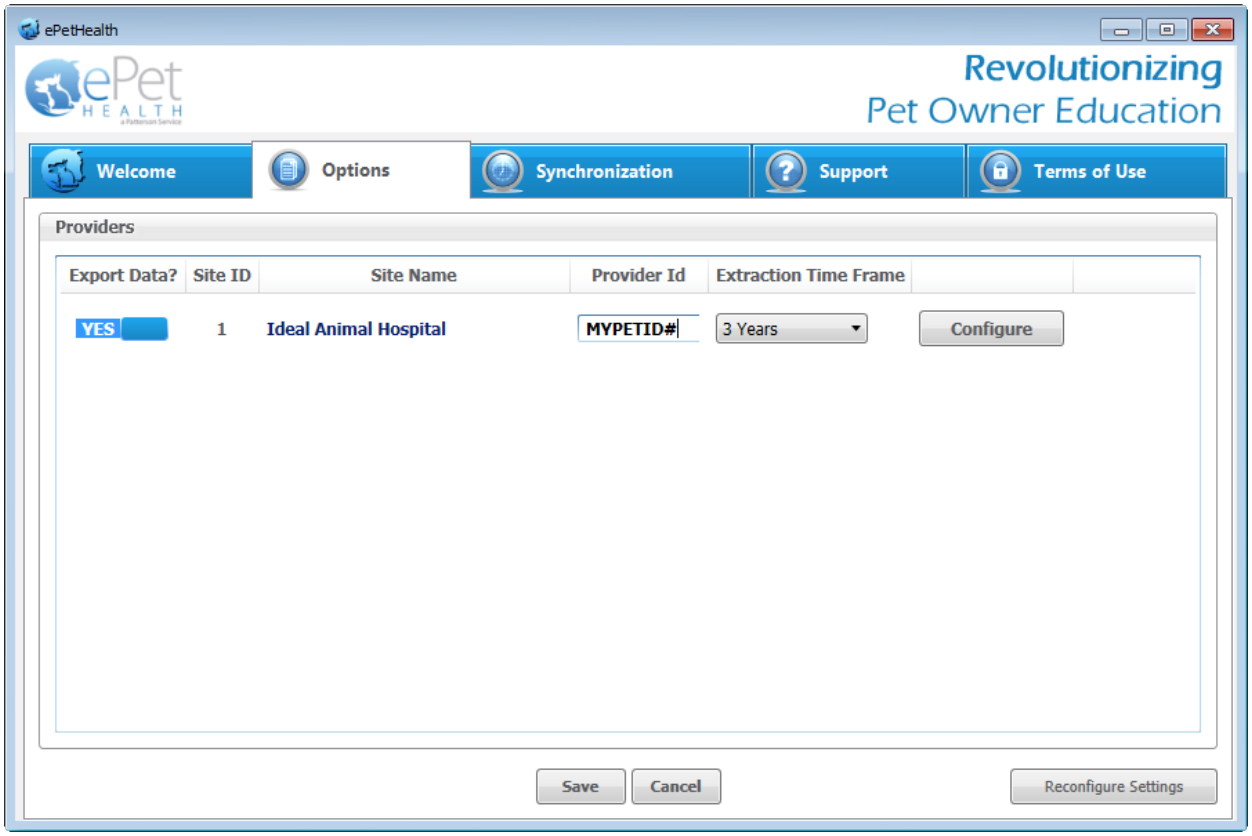
- The Options tab gives the practice the option to include or exclude sites in the synchronization. The practice's Provider ID and VetSource ID (if subscribed) are also entered in this tab.

- All selected sites will be present in separate extracted files. The content in the corresponding *Configure* option defines the practice data to be included.

- All locations are identified by a site ID *(ex. ABC)*. Each file contains data for patients associated with the specified site code*(s)* **or** that have an appointment, reminder, or transaction associated with the specified site code*(s)* within the extraction date range.

- Sliding the Export Data? option to *NO* for site IDs will filter out all patients associated with that site ID and exclude them from the sync.

- Extraction Time Frames can be set to pull data from the past six months, one year, two years or three years.



Configure

Selections

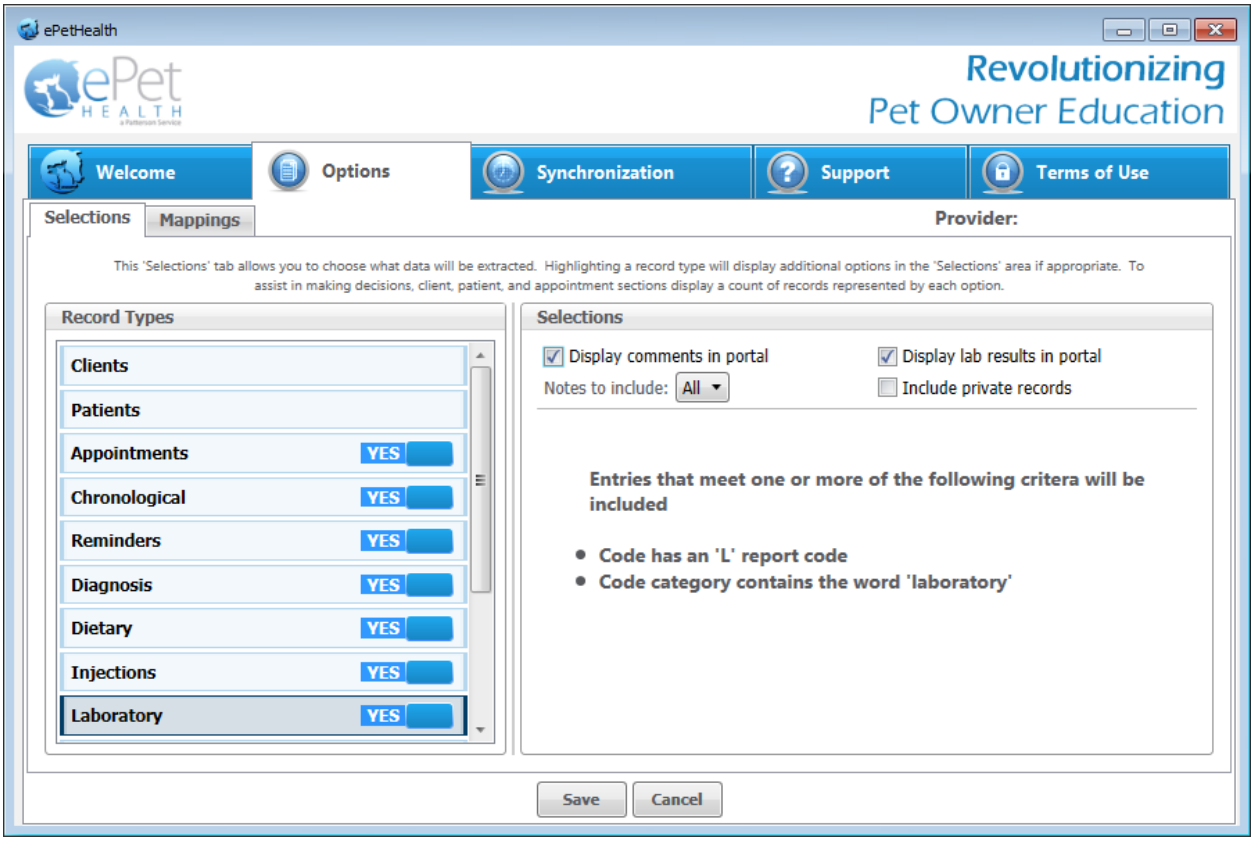
Click on the Configure button from the Options tab to configure the data that will be extracted from the practice database.

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.

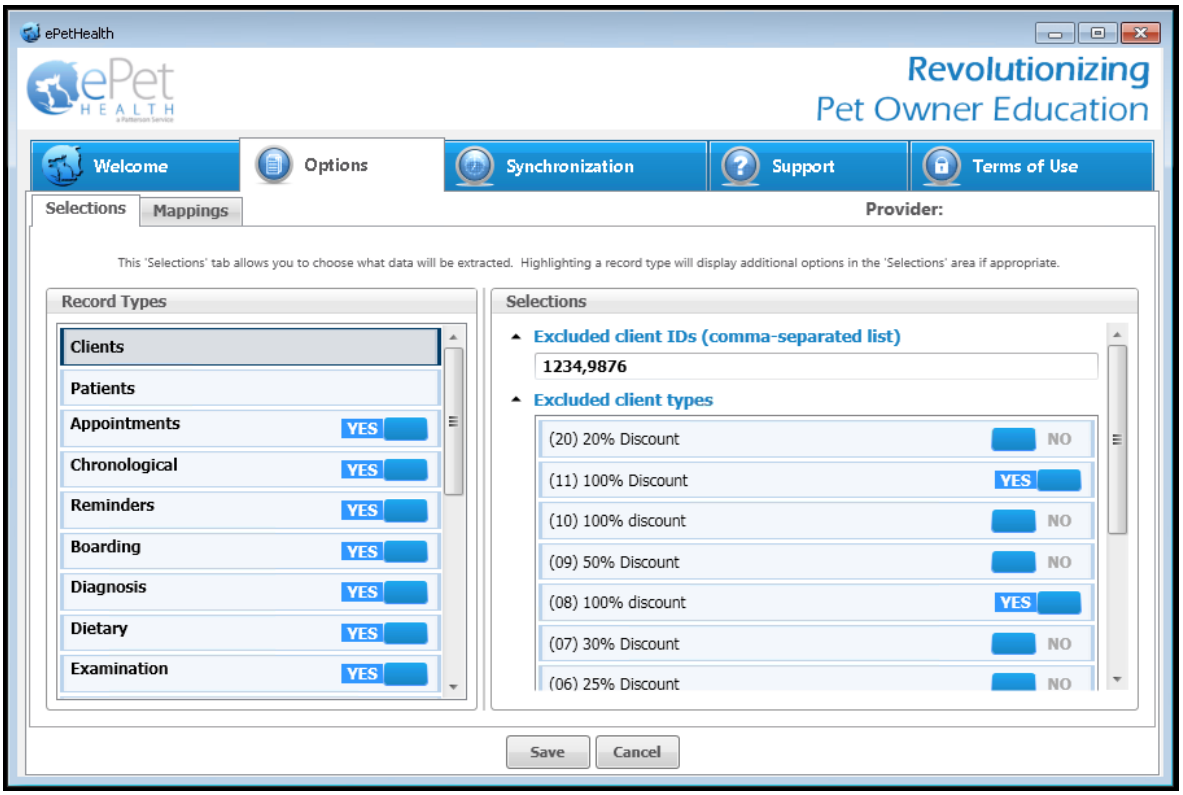


Client Selections

- 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).

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

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

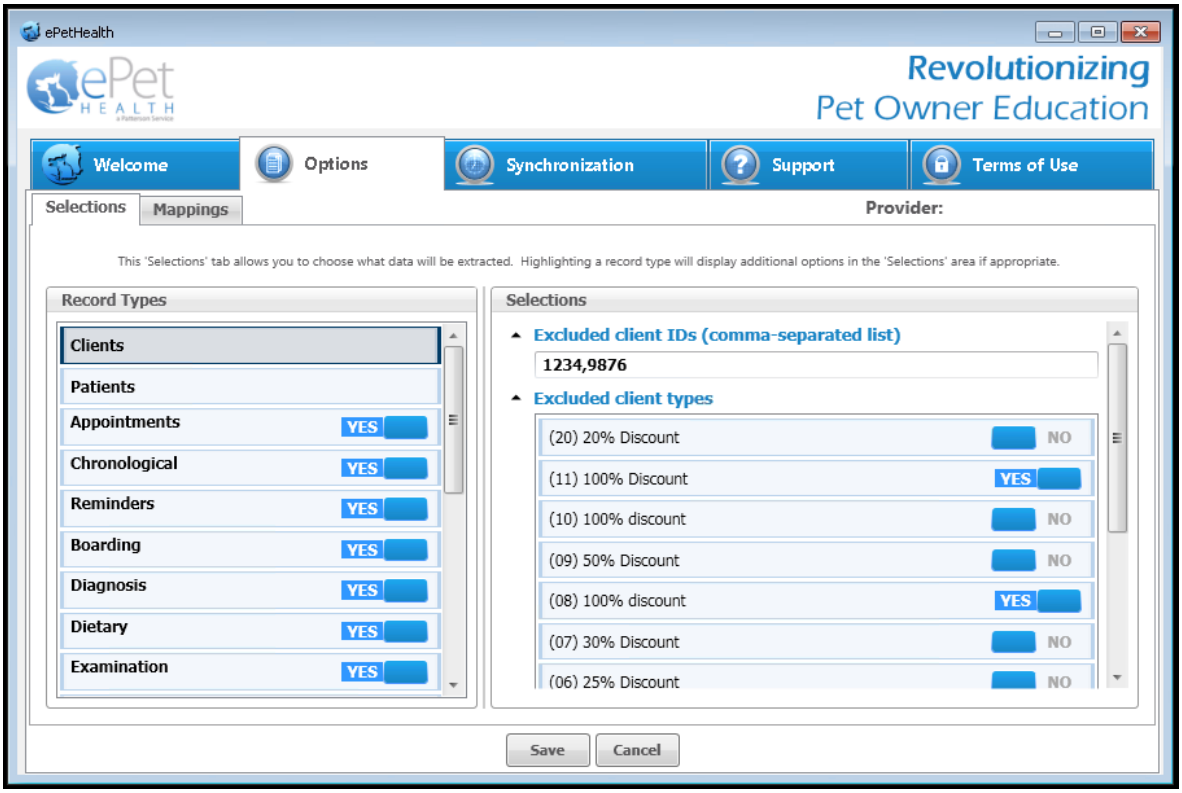


Patient Selections

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

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

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



Appointment Selections

- Appointments can be included or excluded based on the following criteria on a per site basis. These are all included by default in a new installation.

    - a specific provider/resource
    - appointment types
    - appointment statuses
    - appointment tracking statuses

  AVImark SQL does not support appointment reasons.

- 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.

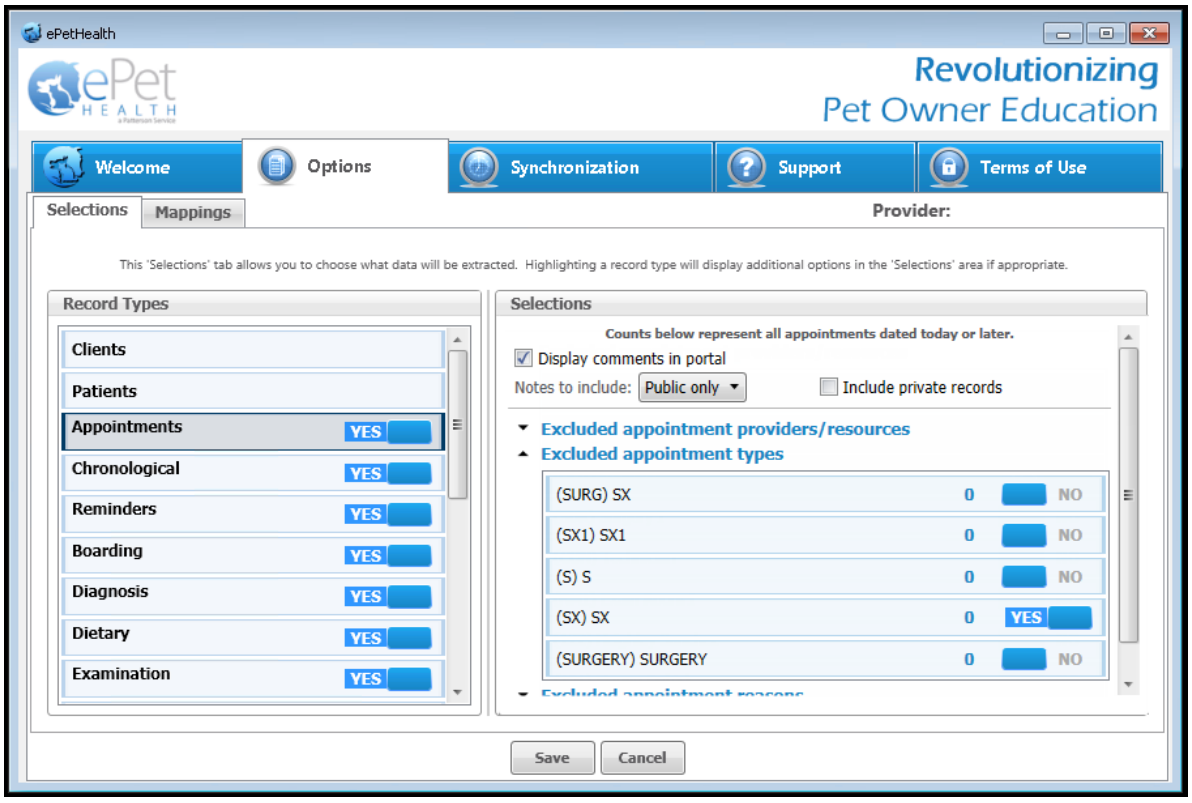
- In the Selections Table, comments (notes) may be selected to display in the Client Portal by checking the box at the top of the table. This is deselected (excluded) by default.

- **Notes to include/All:** When the 'Display comments in portal' option is selected, notes in AVImark SQL, whether they are marked as Public or not, will displayed on the portal.

- **Notes to include/Public Only:** When the 'Display comments in portal' option is selected, notes in AVImark SQL marked as Public will displayed on the portal.

- **Include private records:** When the 'Include private records' checkbox is selected, records marked as *private* in AVImark SQL will be displayed on the portal.

- 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.


ePetHealth
Revolutionizing
Pet Owner Education
Welcome
Options
Synchronization
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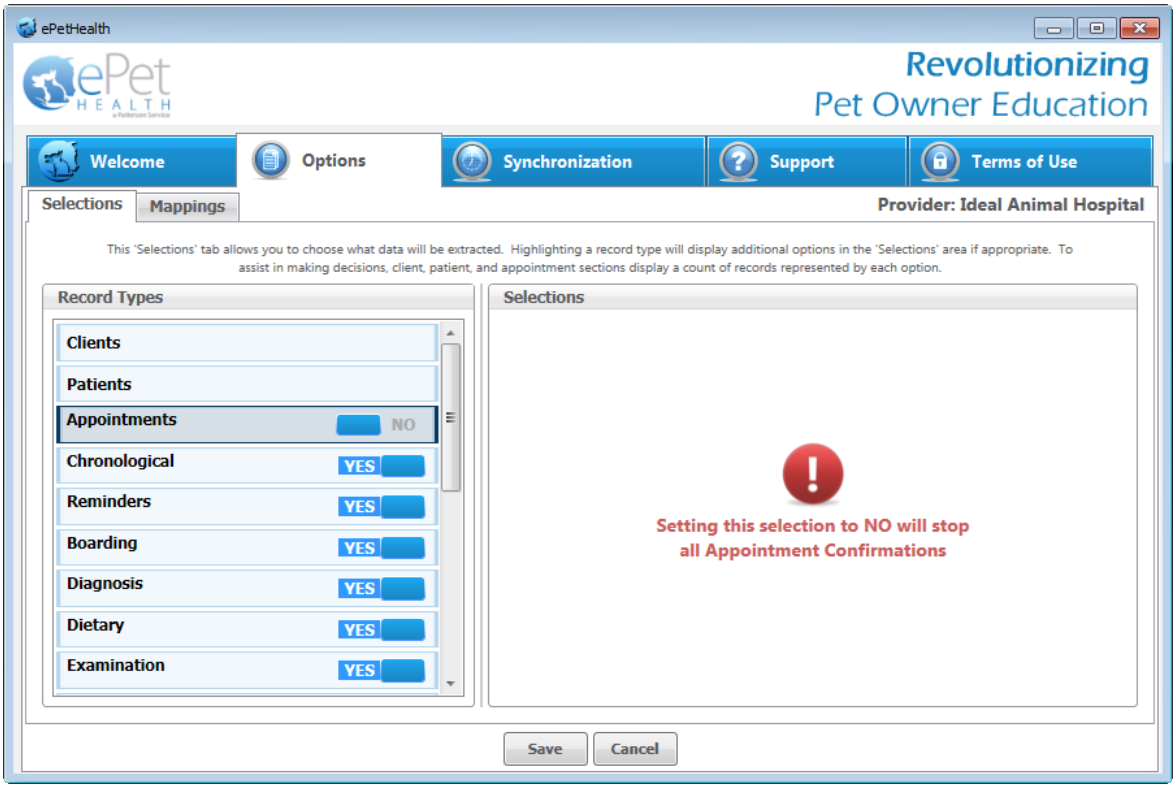
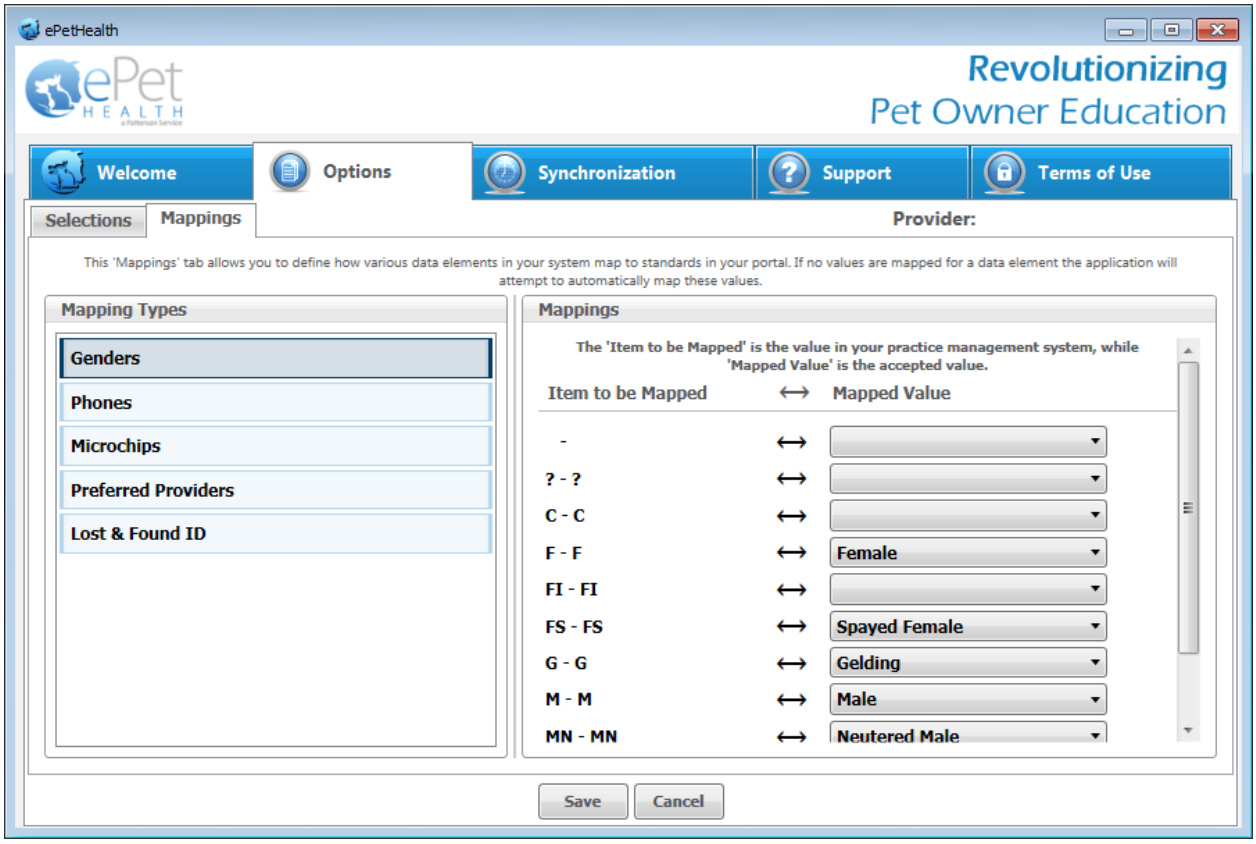
Selections
Mappings
Provider:
This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate.
Record Types
Clients
Patients
Appointments YES
Chronological YES
Reminders YES
Boarding YES
Diagnosis YES
Dietary YES
Examination YES
Selections
Counts below represent all appointments dated today or later.
Display comments in portal
Notes to include: Public only
Include private records
Excluded appointment providers/resources
Excluded appointment types
(SURG) SX 0 NO
(SX1) SX1 0 NO
(S) S 0 NO
(SX) SX 0 YES
(SURGERY) SURGERY 0 NO
Save
Cancel


ePetHealth
Revolutionizing
Pet Owner Education
Welcome
Options
Synchronization
Support
Terms of Use
Selections
Mappings
Provider: Ideal Animal Hospital
This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.
Record Types
Clients
Patients
Appointments NO
Chronological YES
Reminders YES
Boarding YES
Diagnosis YES
Dietary YES
Examination YES
Selections
Setting this selection to NO will stop all Appointment Confirmations
Save
Cancel

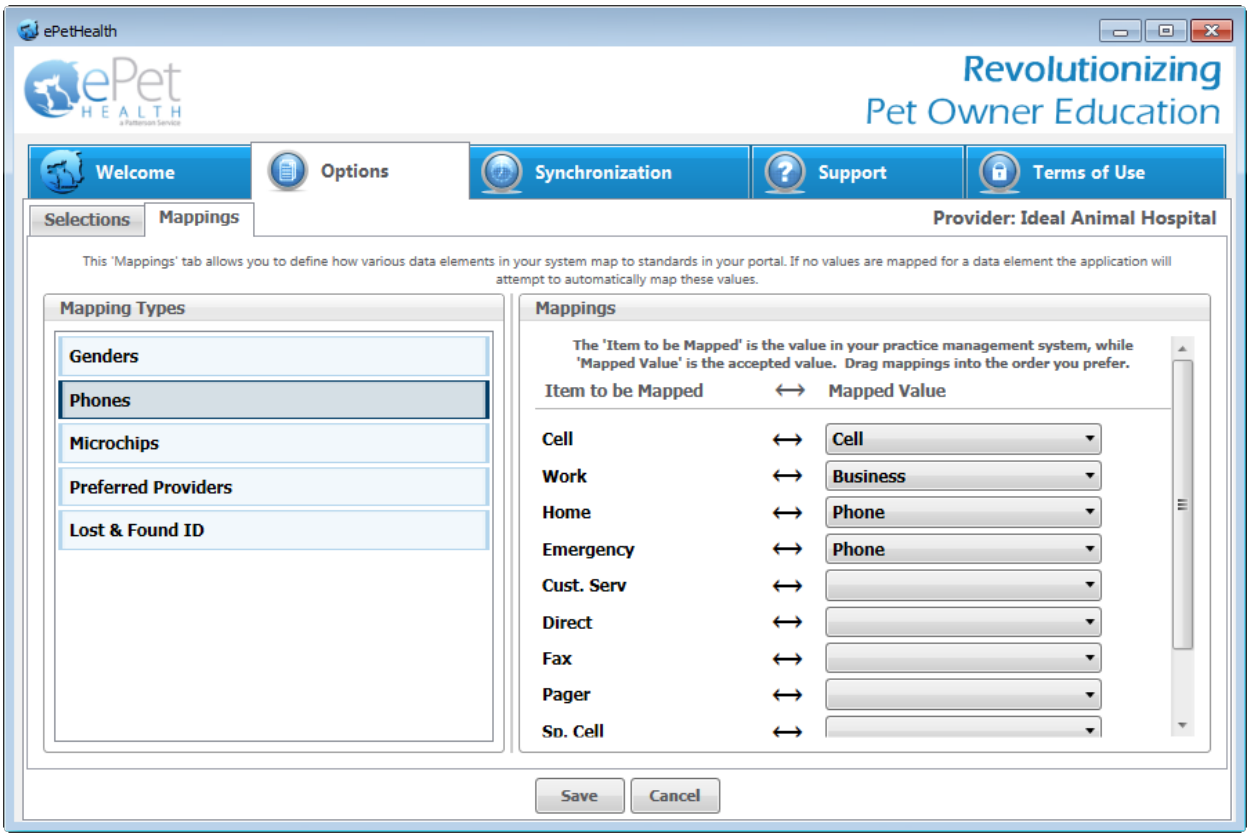
Mappings

- 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.

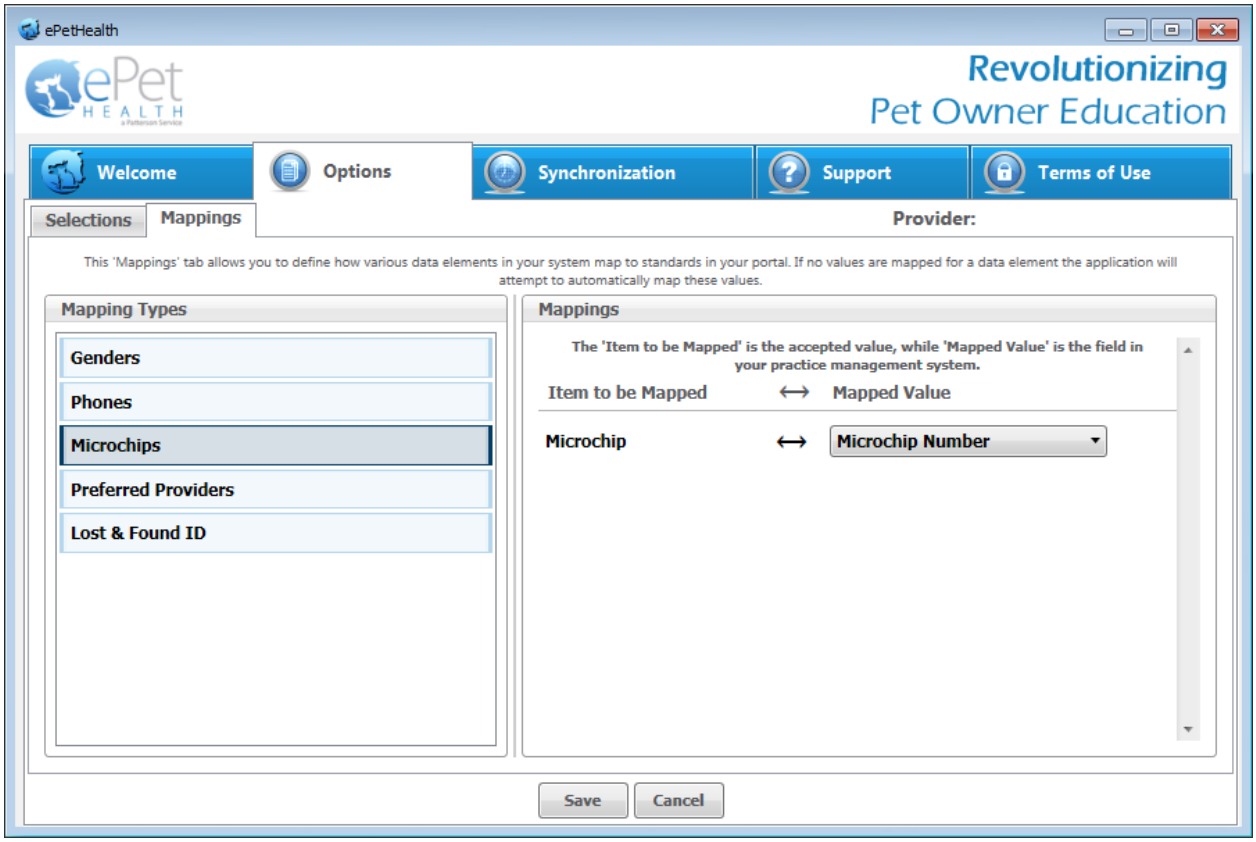
- Genders:
  - The 'Item to be Mapped' is the value in the Practice Management System.
  - The 'Mapped Value' is the accepted value.
  - Multiple genders can be mapped to the same Mapped Value.
  - Mapped Values can be left blank if the corresponding Item to be Mapped is not to be shown in the Client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



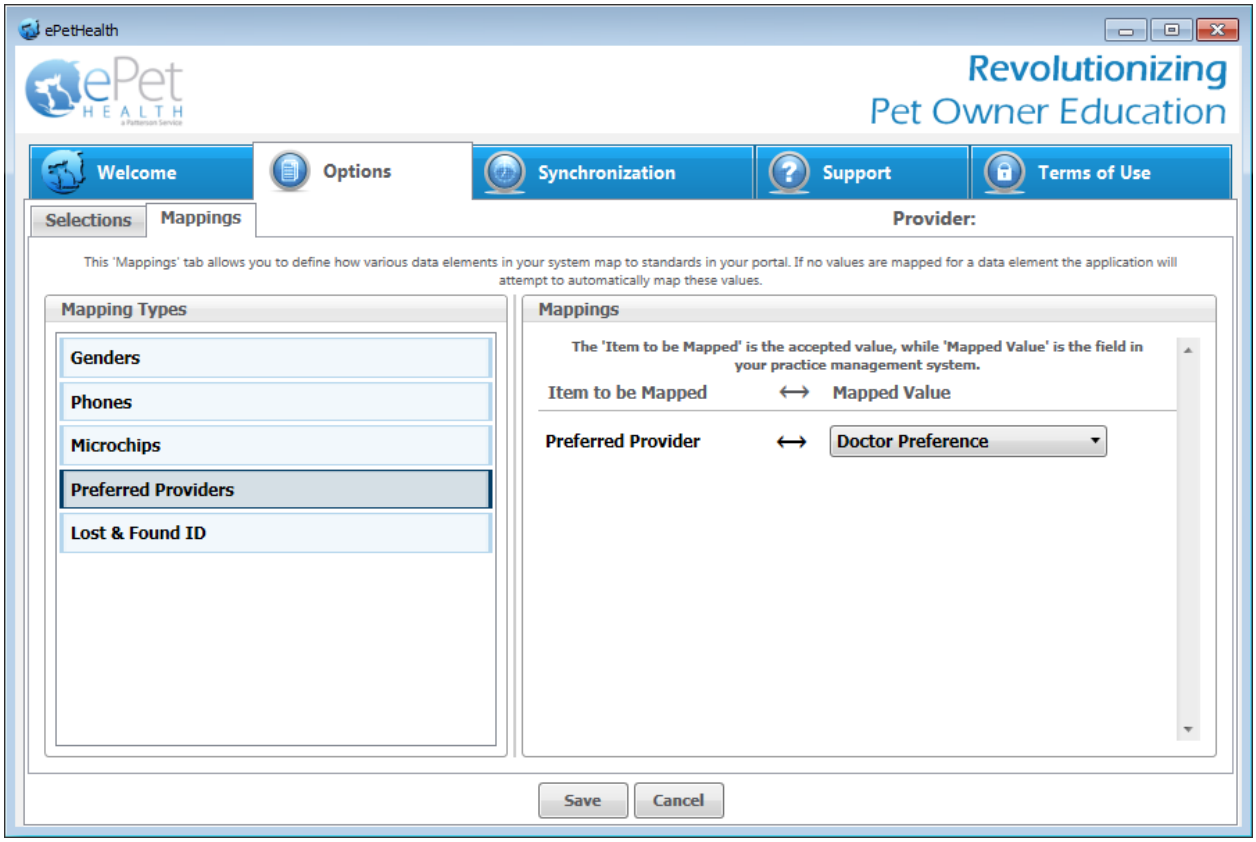
- Phones:
  - The 'Item to be Mapped' is the value in the Practice Management System.
  - The 'Mapped Value' is the accepted value.
  - Multiple phones can be mapped to the same Mapped Value, but only the first phone displayed in the list will be shown for that particular client. For example, Phone and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



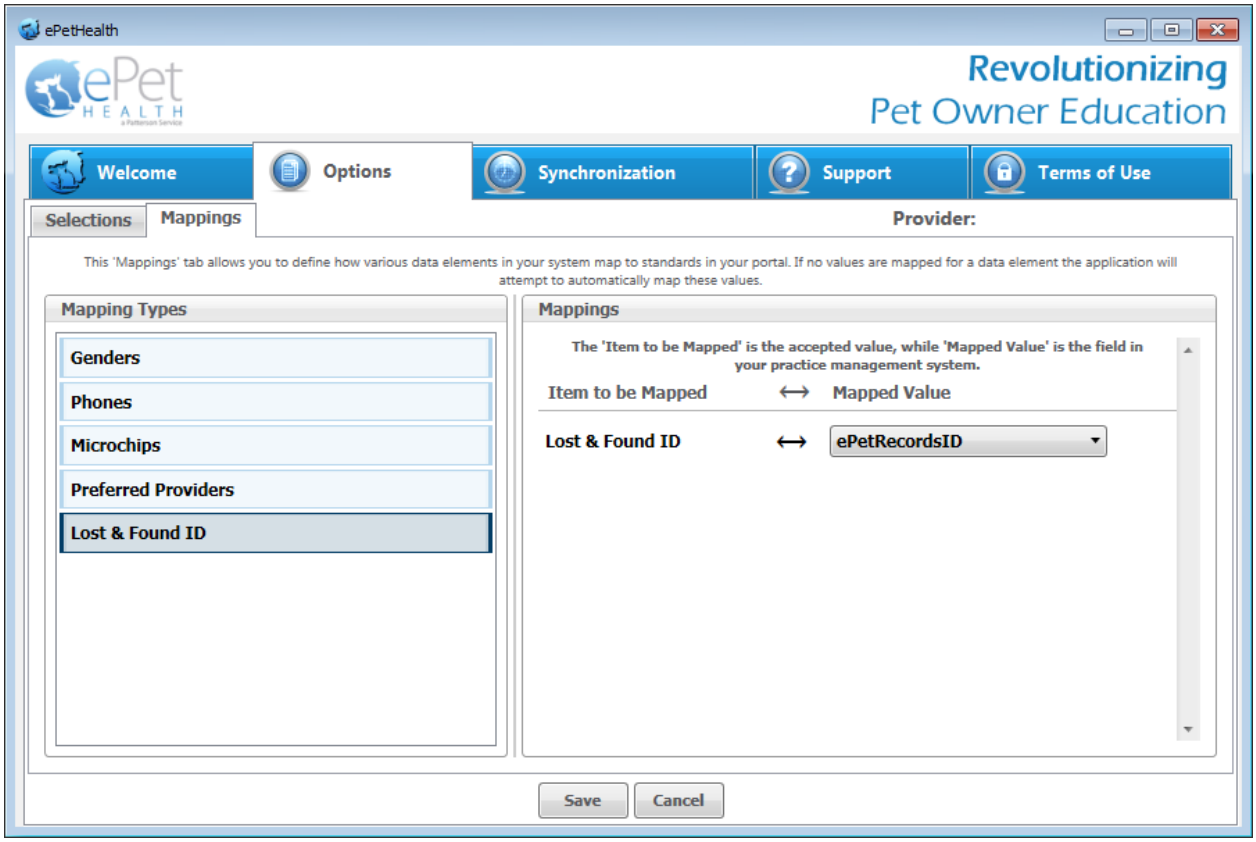
- Microchips:
  - The 'Item to be Mapped' is the accepted value.
  - The 'Mapped Value' is the value in the Practice Management System.
  - Mapped Values can be left blank if the corresponding Item to be Mapped is not to be shown in the Client Portal.
  - For example, the practice would need to designate that the Microchip (Item to be Mapped) that will display in the Client Portal is the same as Microchip Number (Mapped Value) in their Practice Management System.



- Preferred Provider:
  - The 'Item to be Mapped' is the accepted value.
  - 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.
  - 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 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



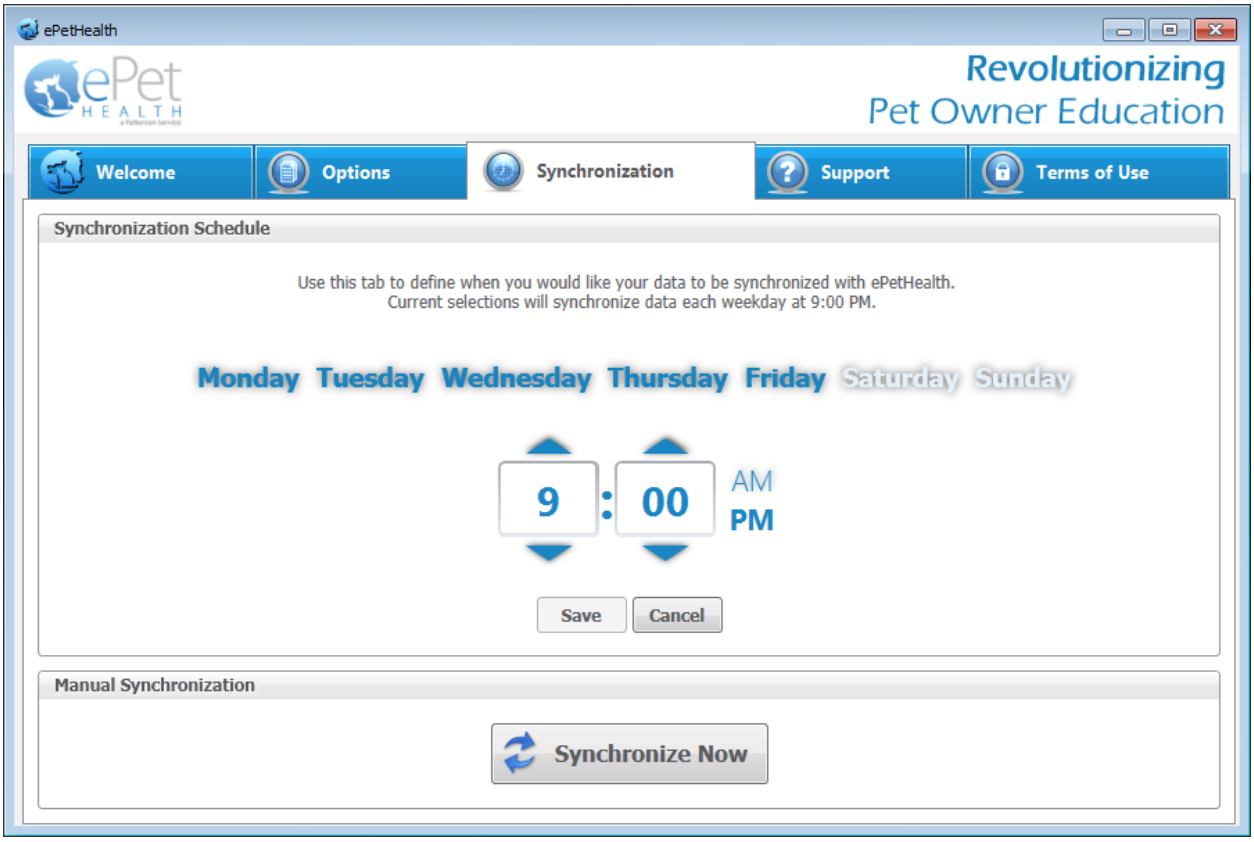
Synchronization

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.



Support | Contact Us

Support | Diagnostics

Service status:

- Displays the state of the service that calls the extraction
- Statuses include: Starting, Running, Paused, Stopping, Stopped, Error, Not Installed

Extraction status:

- Displays the current state of the extraction
- Statuses include: Extracting, Idle

Version:

- Displays the current version number of the ePetHealth Dashboard

Last Extraction:

- Displays the last extraction date and time.

Last Result:

- Displays the last extraction status. Statuses include: Successful, Failed

Application Logging:

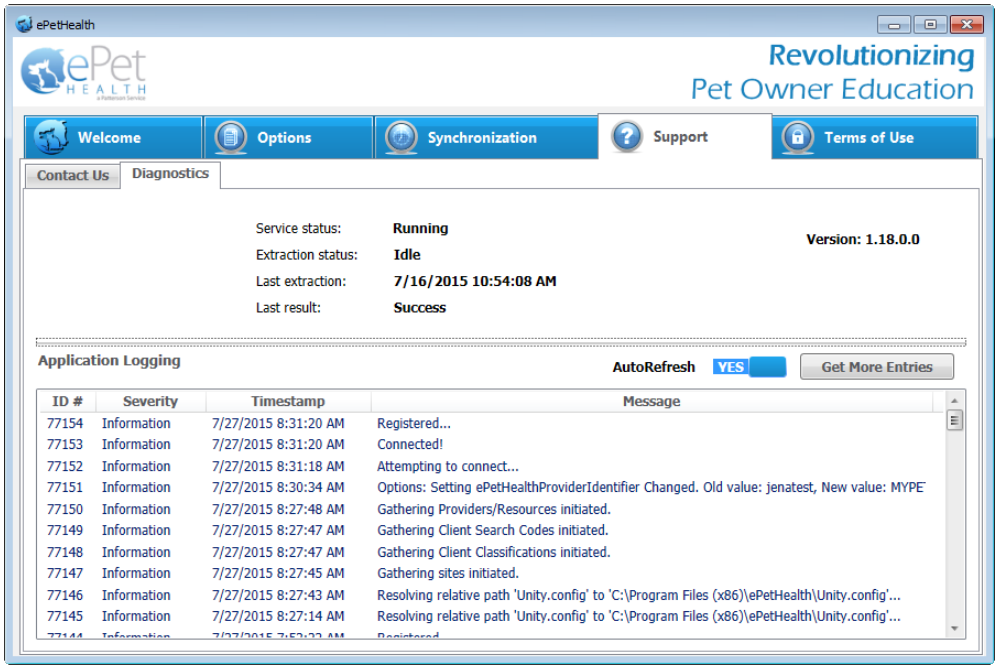
- Provides a list of the 100 most recent entries

AutoRefresh:

- With this option set to YES, the most up-to-date series of logs will be displayed

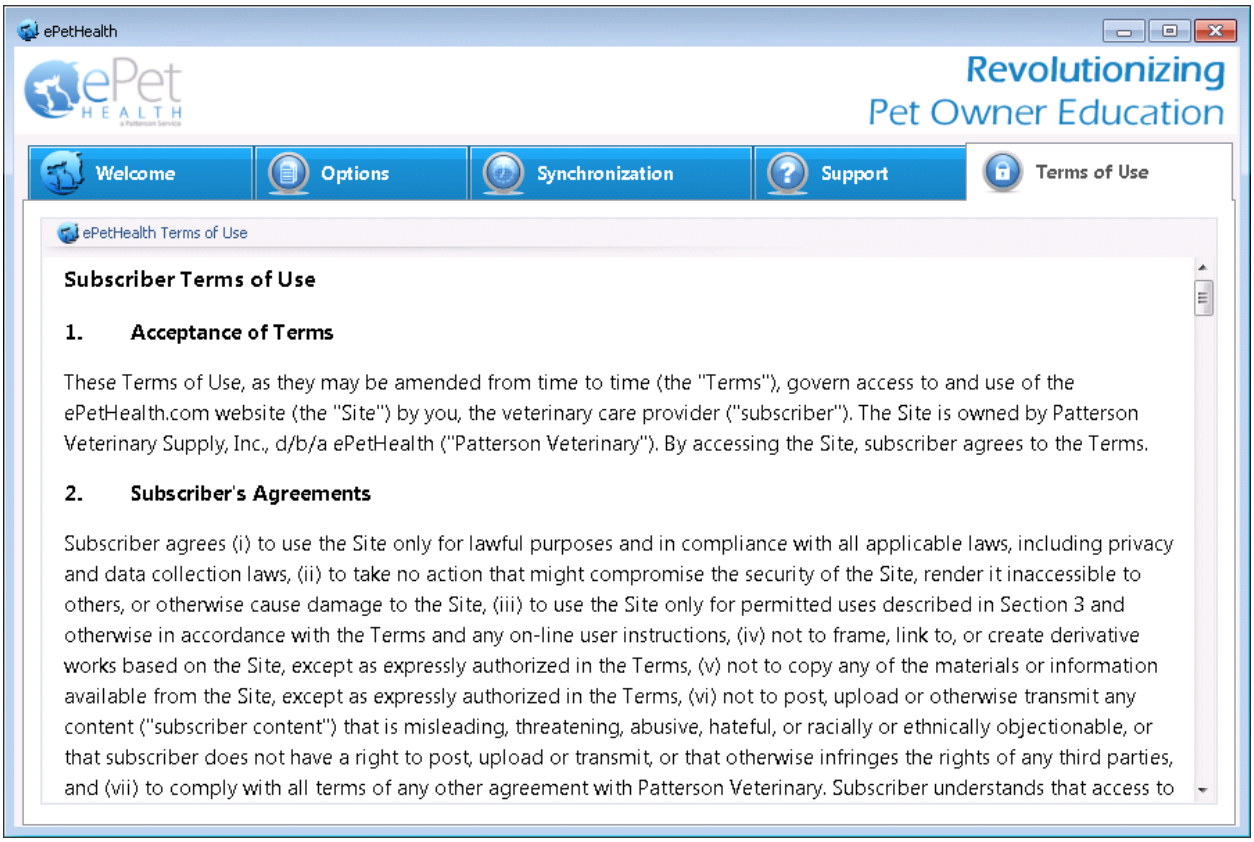
Get More Entries:

- Selecting *Get More Entries* will show the next 100 entries available in addition to the ones listed



Terms of Use

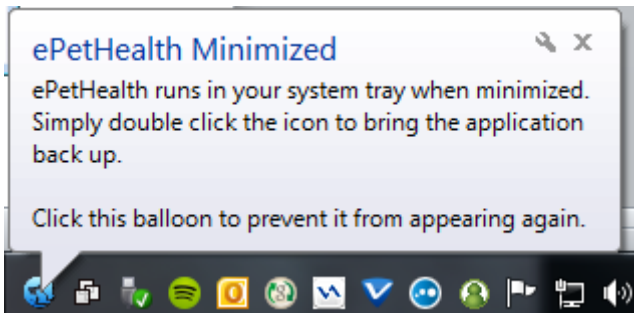
The Terms of Use tab displays the most current policies from ePetHealth.



Program Closing/Minimizing:

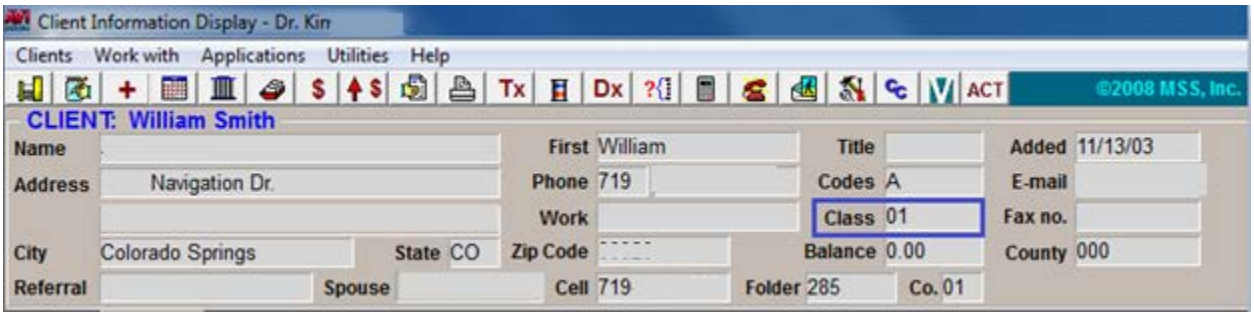
The ePetHealth application, when minimized, resides in the system tray. To launch the application, double-click the icon.

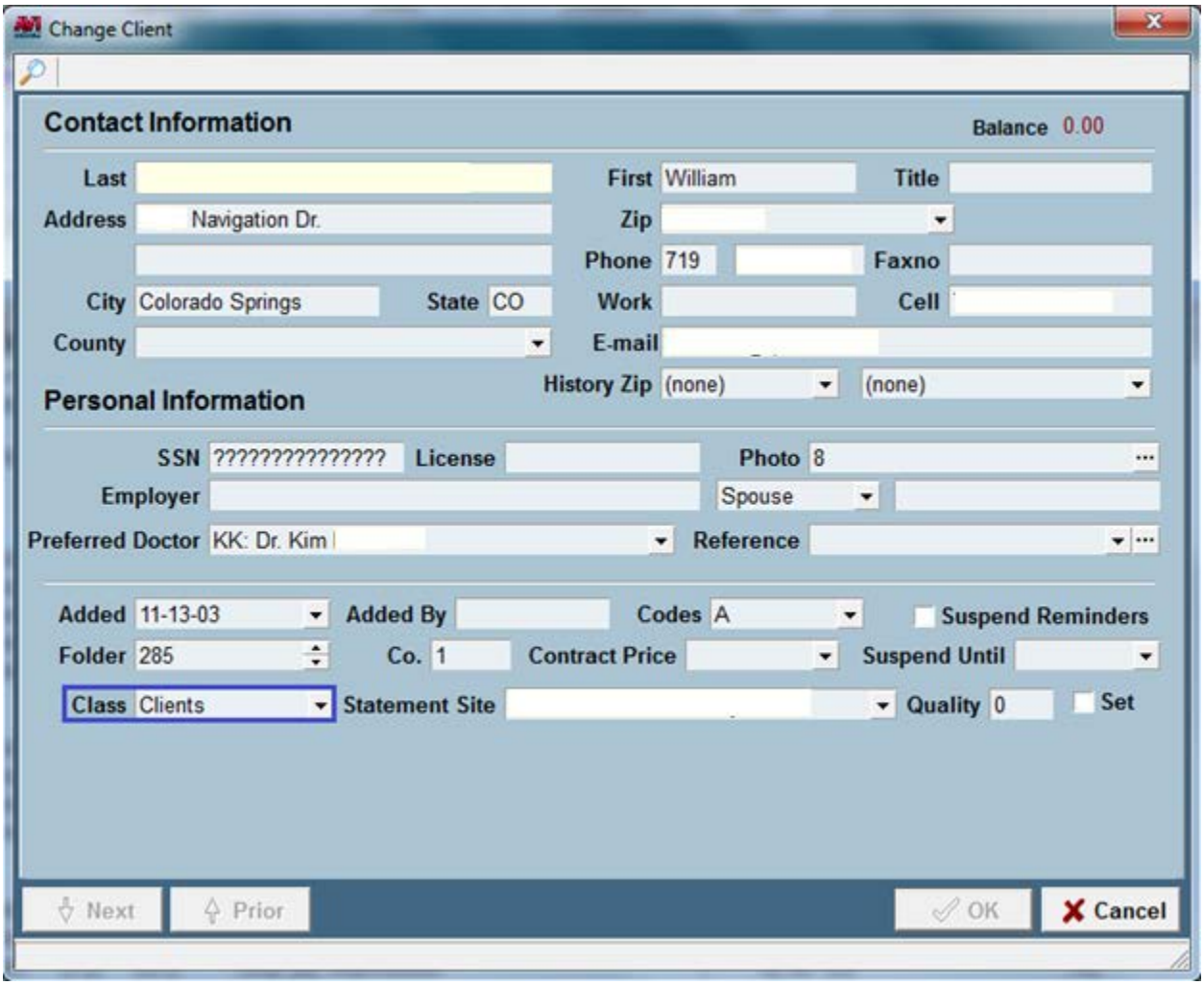
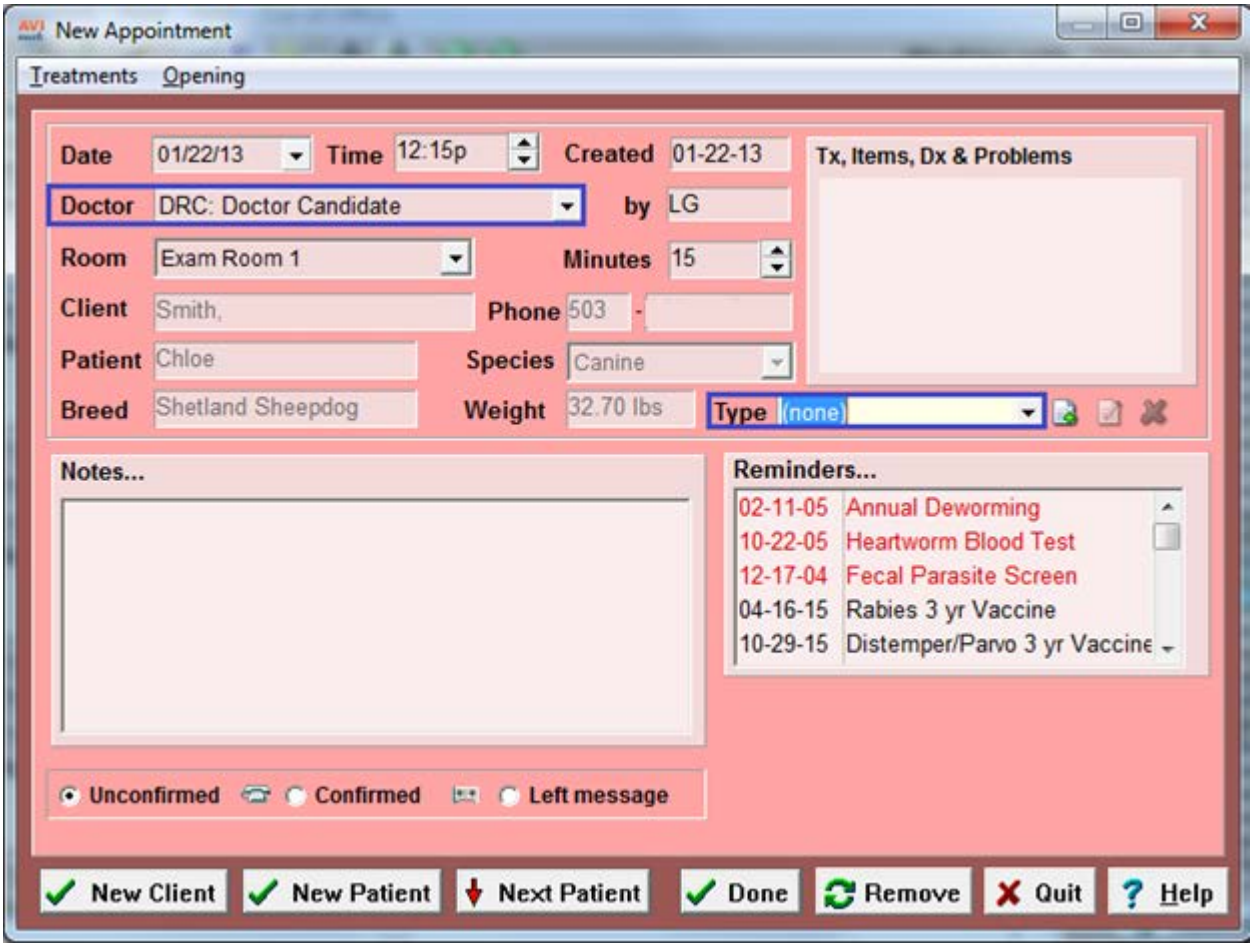
Note: Scheduled extractions will continue to run whether the application is minimized or closed.



AVImark SQL Filter Data

Class Codes





Appointment Filtering