



▶ Veterinarians  
▶ Pet Owners

Email

first-time login?  
email not registered?

Password

forgot password?

**LOGIN**



Lost  
& Found

tag ID

**SEARCH**

LOGIN

# ePetHealth Dashboard IntraVet 4.5

## Table of Contents

Introduction.....	3
Installation & Setup .....	3
Authentication   Configuration .....	3
General Settings.....	3
Authentication Settings.....	3
Connection Settings .....	3
Functionality .....	5
Welcome .....	5
Options .....	6
Configure .....	7
Selections.....	7
Client Selections.....	8
Patient Selections.....	9
Appointment Selections .....	10
Appointment Confirmation .....	12
Mappings .....	13
Synchronization .....	18
Support   Contact Us .....	19
Support   Diagnostics.....	20
Terms of Use.....	21
Program Closing/Minimizing: .....	21
IntraVet 4.5 Filter Data.....	22
Classification Codes / Client Types.....	22
Appointment Filtering.....	23

**\*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 IntraVet 4.5 from the PMS Menu
  - IntraVet 4.5 versions 4.5 and above 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 IntraVet 4.5, the Authentication Settings and Connection Settings will always require input.

### 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

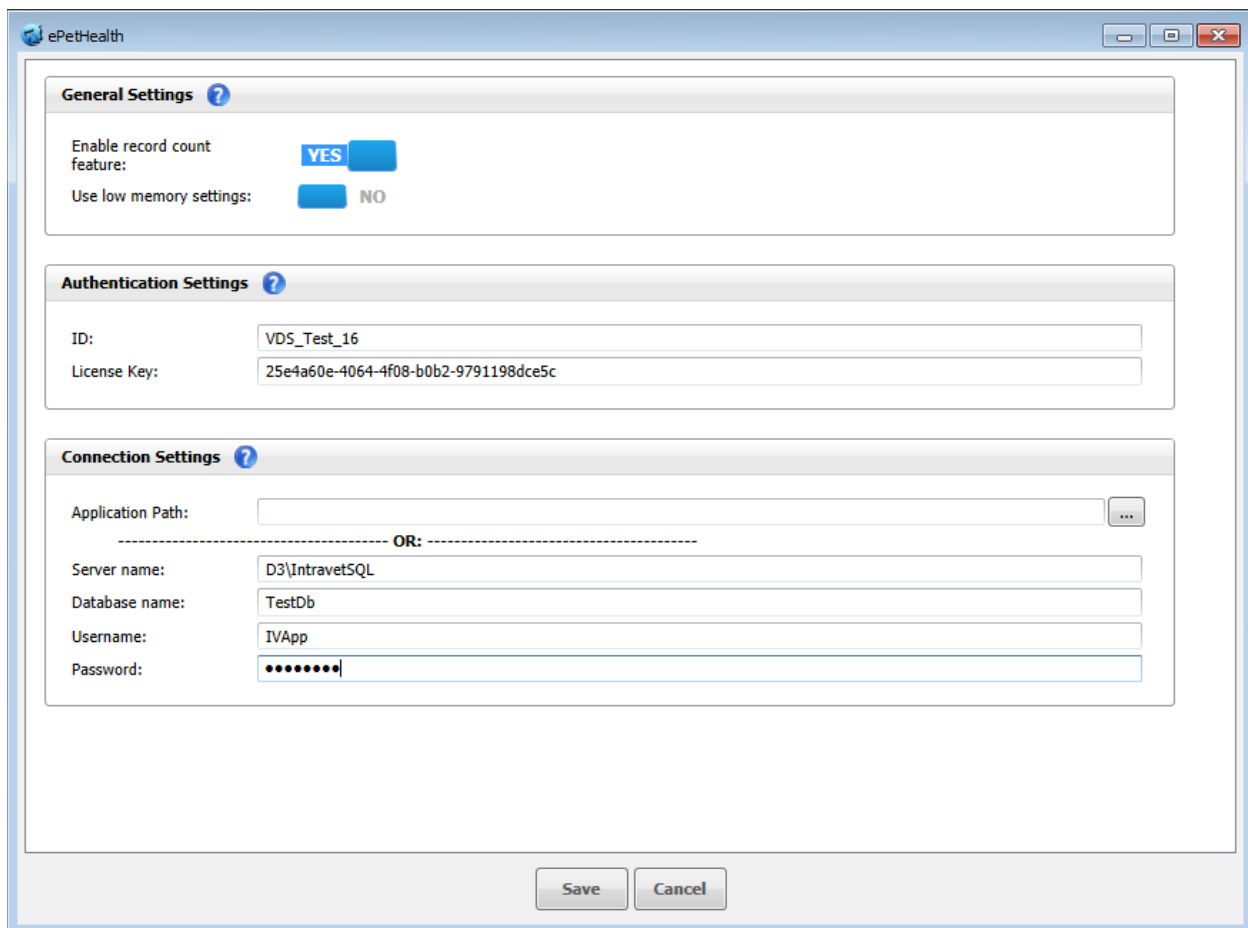
- **ID:** Created by Patterson Veterinary and is required to activate the ePetHealth Dashboard.
- **License Key:** Created by Patterson Veterinary and is required to activate the ePetHealth Dashboard.

### Connection Settings

- **Application Path:** Enter the installation path of the Practice Management Software with the folder containing the IntraVetAppService.exe.config file.

\* 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:** Enter the username required to log into Microsoft SQL Server.
- **Password:** Enter the password required to log into Microsoft SQL Server.

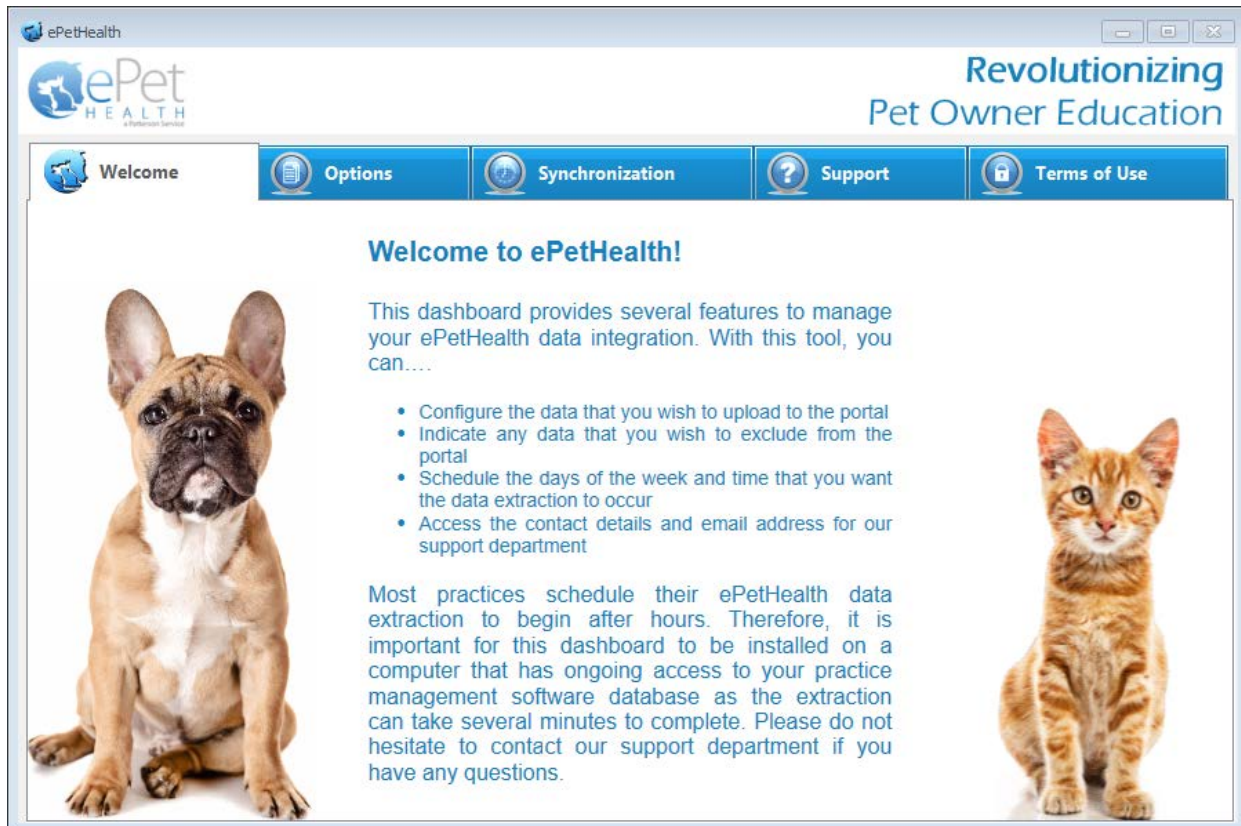


The screenshot shows the ePetHealth settings window with three main sections: General Settings, Authentication Settings, and Connection Settings. The General Settings section has two toggle buttons: 'Enable record count feature' set to YES and 'Use low memory settings' set to NO. The Authentication Settings section has two text input fields: 'ID' with the value 'VDS\_Test\_16' and 'License Key' with the value '25e4a60e-4064-4f08-b0b2-9791198dce5c'. The Connection Settings section has an 'Application Path' field with a browse button, followed by an 'OR:' separator. Below the separator are four text input fields: 'Server name' with 'D3\IntravetSQL', 'Database name' with 'TestDb', 'Username' with 'IVApp', and 'Password' with masked characters. At the bottom of the window are 'Save' and 'Cancel' buttons.

## Functionality

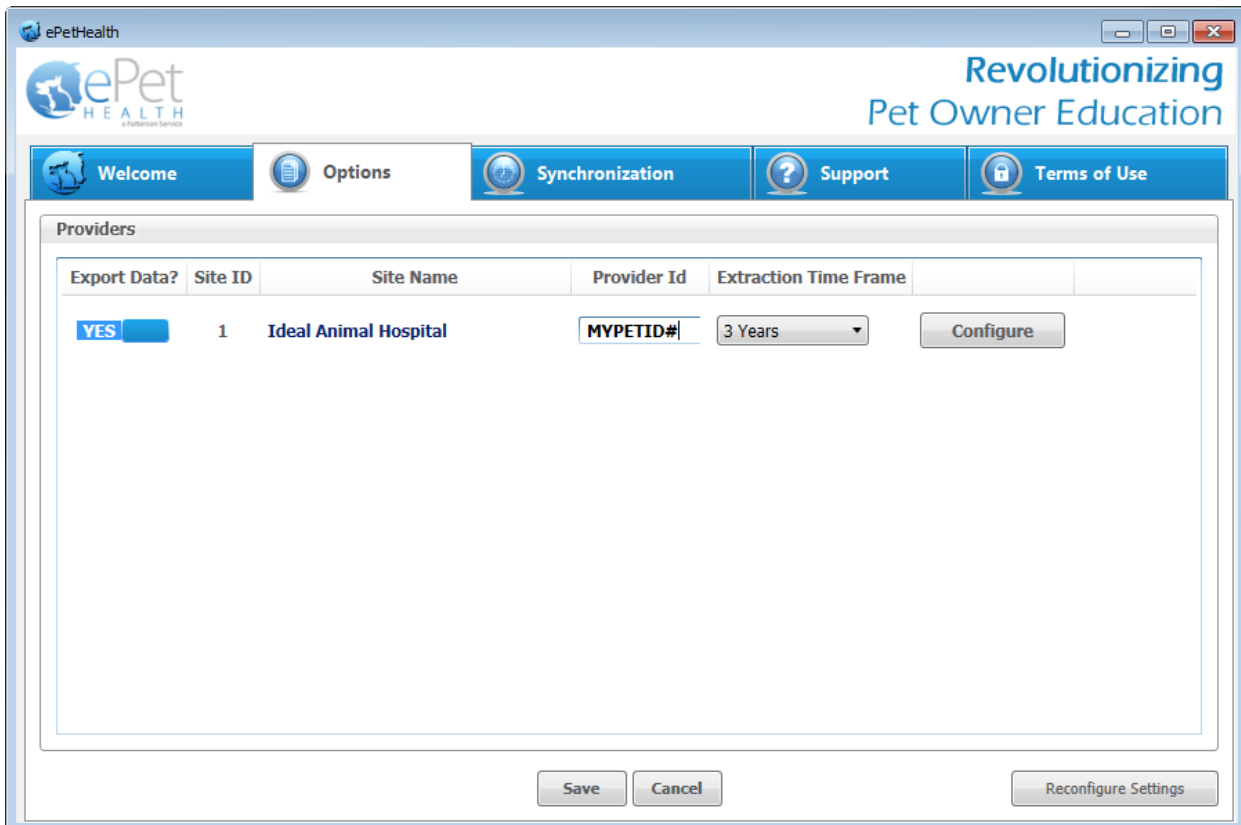
### Welcome

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.



The screenshot shows the 'Options' tab in the ePetHealth application. The 'Providers' section contains a table with the following data:

Export Data?	Site ID	Site Name	Provider Id	Extraction Time Frame	
<input checked="" type="checkbox"/>	1	Ideal Animal Hospital	MYPETID#	3 Years	<input type="button" value="Configure"/>

At the bottom of the window, there are three buttons: 'Save', 'Cancel', and 'Reconfigure Settings'.

## Configure

### Selections

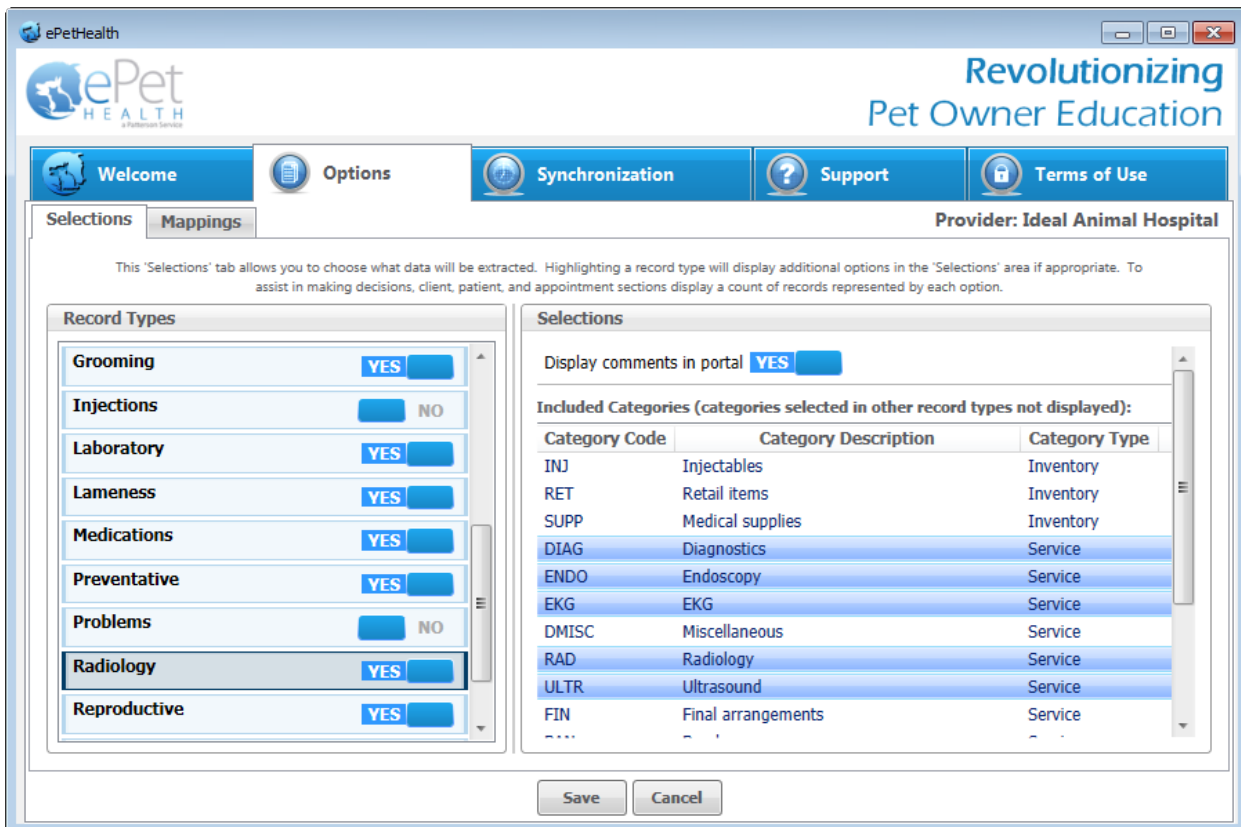
Click on the Configure button from the Options tab to configure the data that will be extracted from the practice database.

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.



The screenshot shows the 'Selections' configuration window in the ePetHealth application. The window title is 'ePetHealth' and the provider is 'Ideal Animal Hospital'. The 'Options' tab is active, and the 'Selections' sub-tab is selected. The window contains two main sections: 'Record Types' and 'Selections'.

**Record Types:** A list of record types with 'YES' or 'NO' toggle buttons:

- Grooming: YES
- Injections: NO
- Laboratory: YES
- Lameness: YES
- Medications: YES
- Preventative: YES
- Problems: NO
- Radiology: YES
- Reproductive: YES

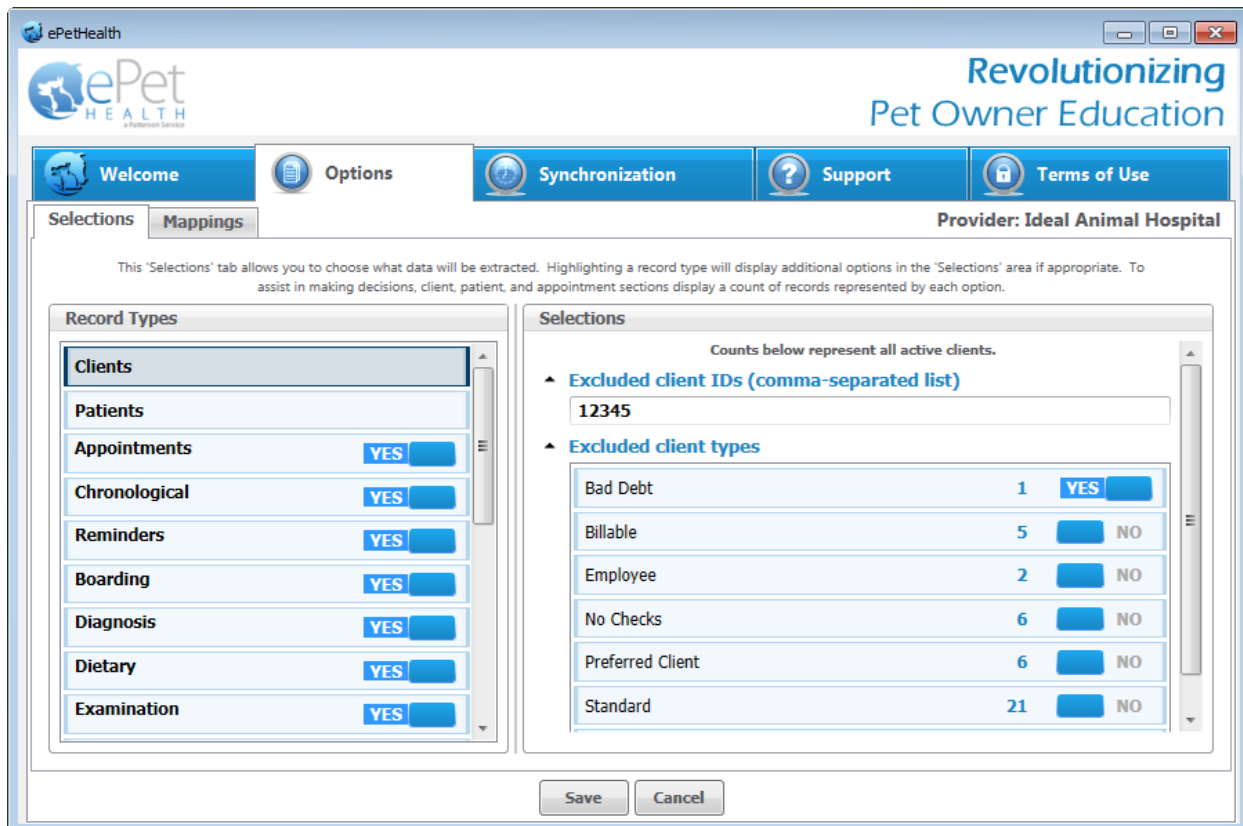
**Selections:** A section for configuring data extraction options. It includes a toggle for 'Display comments in portal' (YES) and a table of 'Included Categories (categories selected in other record types not displayed):'

Category Code	Category Description	Category Type
INJ	Injectables	Inventory
RET	Retail items	Inventory
SUPP	Medical supplies	Inventory
DIAG	Diagnostics	Service
ENDO	Endoscopy	Service
EKG	EKG	Service
DMISC	Miscellaneous	Service
RAD	Radiology	Service
ULTR	Ultrasound	Service
FIN	Final arrangements	Service

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

## 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.



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	<input checked="" type="checkbox"/> YES
Billable	5	<input type="checkbox"/> NO
Employee	2	<input type="checkbox"/> NO
No Checks	6	<input type="checkbox"/> NO
Preferred Client	6	<input type="checkbox"/> NO
Standard	21	<input type="checkbox"/> NO

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.



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 Type	Count	YES/NO
Patients		
Appointments		YES
Chronological		YES
Reminders		YES
Boarding		YES
Diagnosis		YES
Dietary		YES
Examination		YES

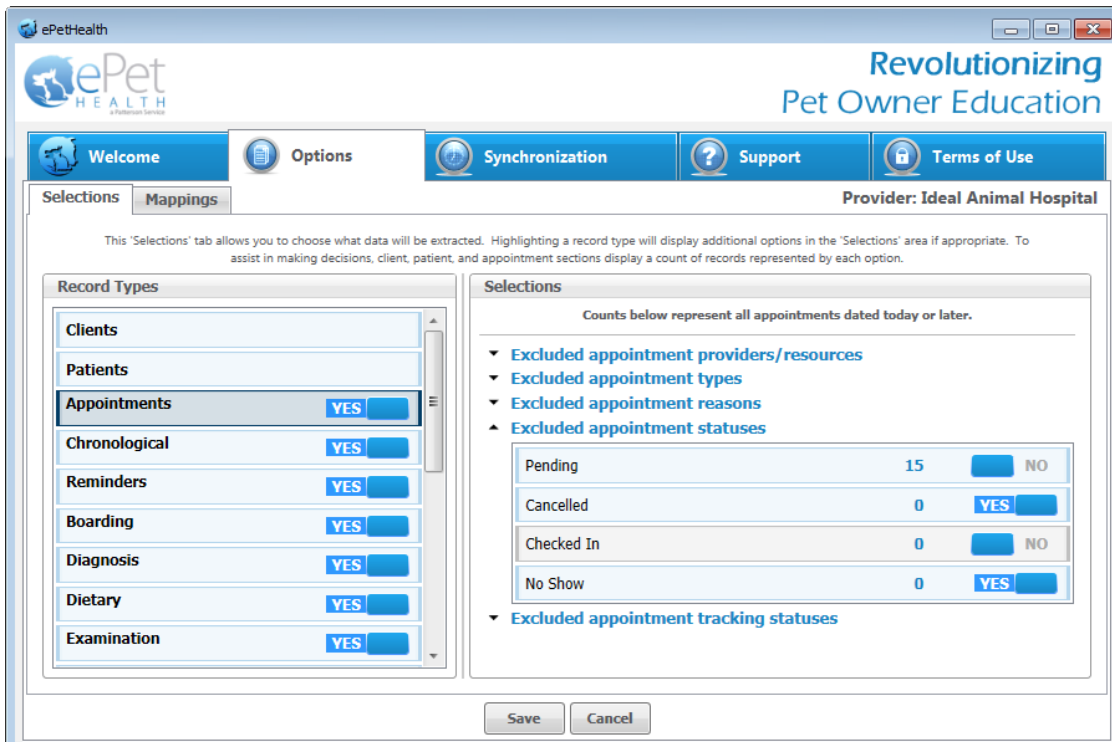
Species	Count	YES/NO
Avian	3	NO
Canine	103	NO
Equine	3	YES
Feline	28	NO
Lagomorpha	1	NO
Misc	3	NO
Rodent	3	NO
(blank)	6	NO

## 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

**All appointment types are included by default. Appointment reasons are entered as free-form text in IntraVet 4.5, so they are not available for exclusion. 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 interface includes a navigation bar with 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. Below the navigation bar, there are tabs for 'Selections' and 'Mappings'. The main content area is divided into two sections: 'Record Types' and 'Selections'.

**Record Types:**

Clients	
Patients	
Appointments	YES
Chronological	YES
Reminders	YES
Boarding	YES
Diagnosis	YES
Dietary	YES
Examination	YES

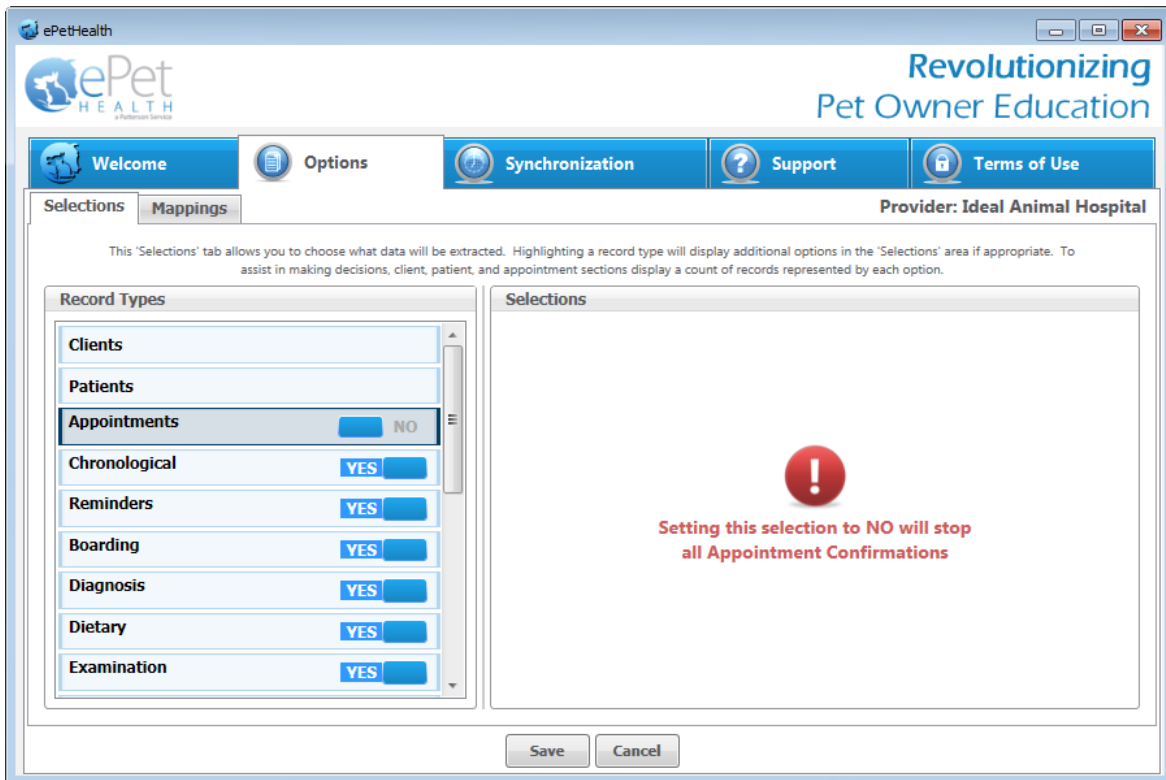
**Selections:**

Counts below represent all appointments dated today or later.

- ▼ Excluded appointment providers/resources
- ▼ Excluded appointment types
- ▼ Excluded appointment reasons
- ▲ Excluded appointment statuses
 

Pending	15	NO
Cancelled	0	YES
Checked In	0	NO
No Show	0	YES
- ▼ Excluded appointment tracking statuses

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



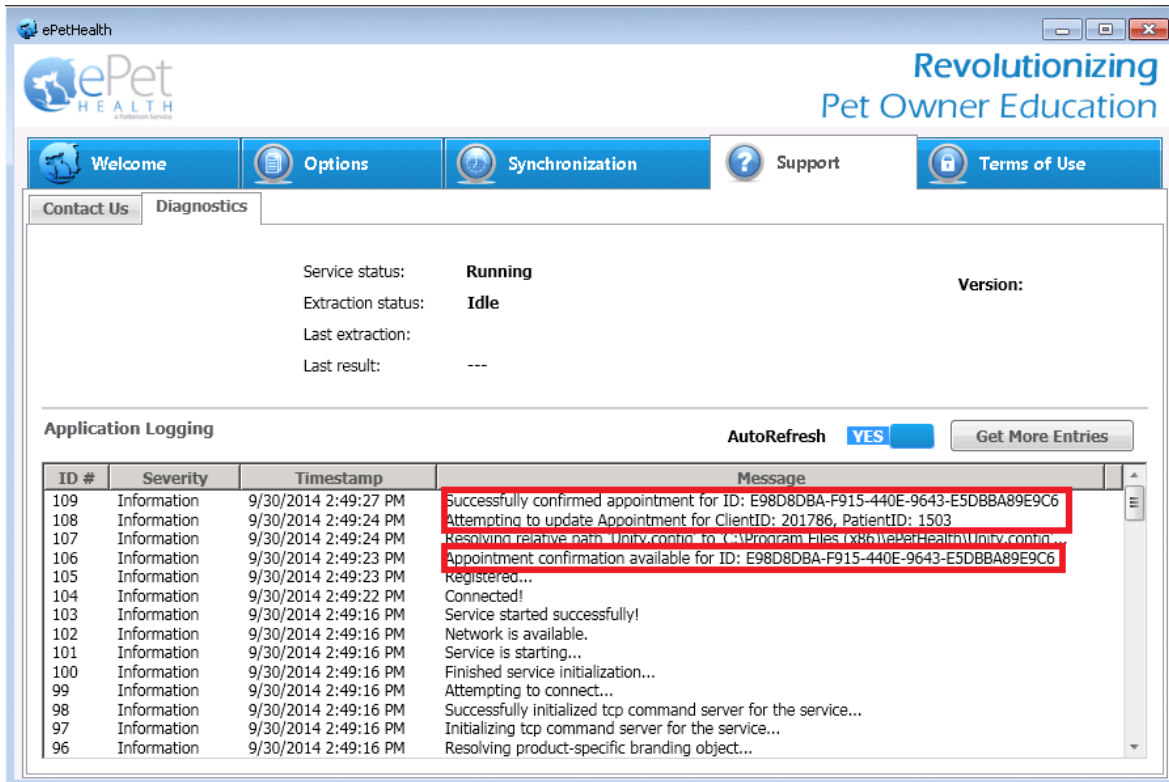
The screenshot shows the 'Options' window in the ePetHealth application. The window title is 'ePetHealth' and it features the ePet HEALTH logo and the slogan 'Revolutionizing Pet Owner Education'. The navigation bar includes 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. The current provider is 'Ideal Animal Hospital'. The 'Options' window has two tabs: 'Selections' (active) and 'Mappings'. 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	NO
Chronological	YES
Reminders	YES
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 Appointment Confirmations'. At the bottom of the window are 'Save' and 'Cancel' buttons.

## Appointment Confirmation

Automated appointment confirmation write back is supported for IntraVet 4.5 in ePetHealth, provided the Provider enables the feature in the Provider Portal | My Practice | General Settings Page and extracts appointments discussed in the previous section. Successful write back can be verified in the logs as seen below or in IntraVet 4.5.

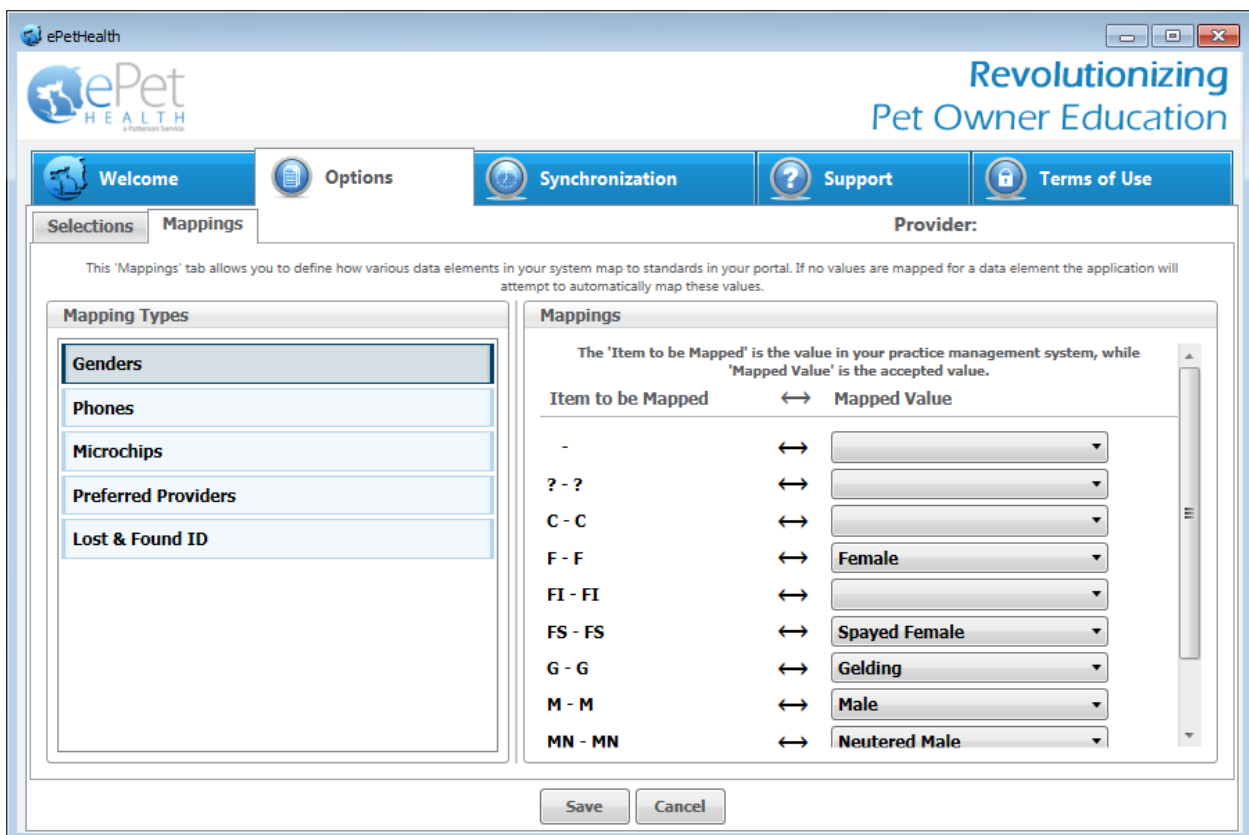


The screenshot shows the ePetHealth application window. The top navigation bar includes 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. Below this, there are tabs for 'Contact Us' and 'Diagnostics'. The main content area displays service status: 'Running', 'Idle', and 'Version:'. Below the status is an 'Application Logging' section with an 'AutoRefresh' button set to 'YES' and a 'Get More Entries' button. A table of application logs is shown below, with three entries highlighted in red.

ID #	Severity	Timestamp	Message
109	Information	9/30/2014 2:49:27 PM	Successfully confirmed appointment for ID: E98D8DBA-F915-440E-9643-E5DBBA89E9C6
108	Information	9/30/2014 2:49:24 PM	Attempting to update Appointment for ClientID: 201786, PatientID: 1503
107	Information	9/30/2014 2:49:24 PM	Resolving relative path 'Unity.config' to 'C:\Program Files (x86)\ePetHealth\Unity.config'
106	Information	9/30/2014 2:49:23 PM	Appointment confirmation available for ID: E98D8DBA-F915-440E-9643-E5DBBA89E9C6
105	Information	9/30/2014 2:49:23 PM	Registered...
104	Information	9/30/2014 2:49:22 PM	Connected!
103	Information	9/30/2014 2:49:16 PM	Service started successfully!
102	Information	9/30/2014 2:49:16 PM	Network is available.
101	Information	9/30/2014 2:49:16 PM	Service is starting...
100	Information	9/30/2014 2:49:16 PM	Finished service initialization...
99	Information	9/30/2014 2:49:16 PM	Attempting to connect...
98	Information	9/30/2014 2:49:16 PM	Successfully initialized tcp command server for the service...
97	Information	9/30/2014 2:49:16 PM	Initializing tcp command server for the service...
96	Information	9/30/2014 2:49:16 PM	Resolving product-specific branding object...

## 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).

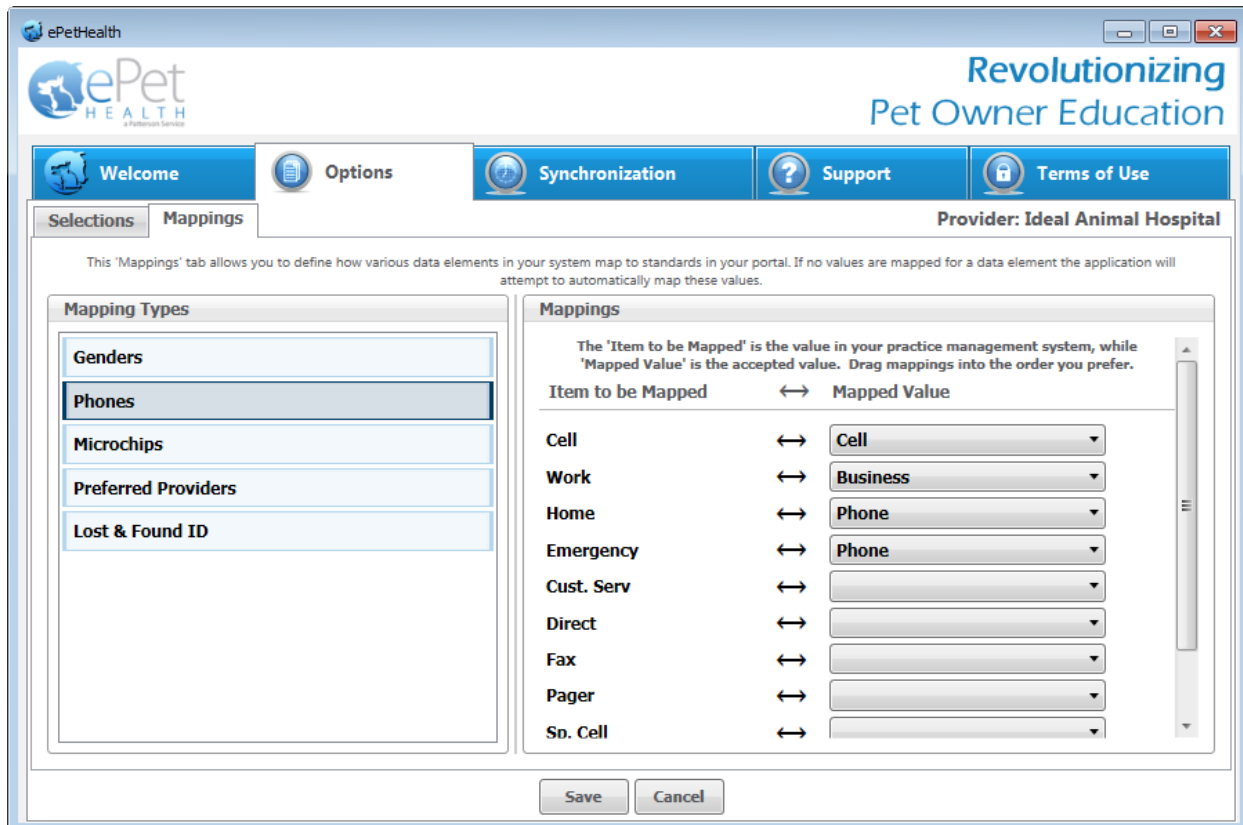


This 'Mappings' tab allows you to define how various data elements in your system map to standards in your portal. If no values are mapped for a data element the application will attempt to automatically map these values.

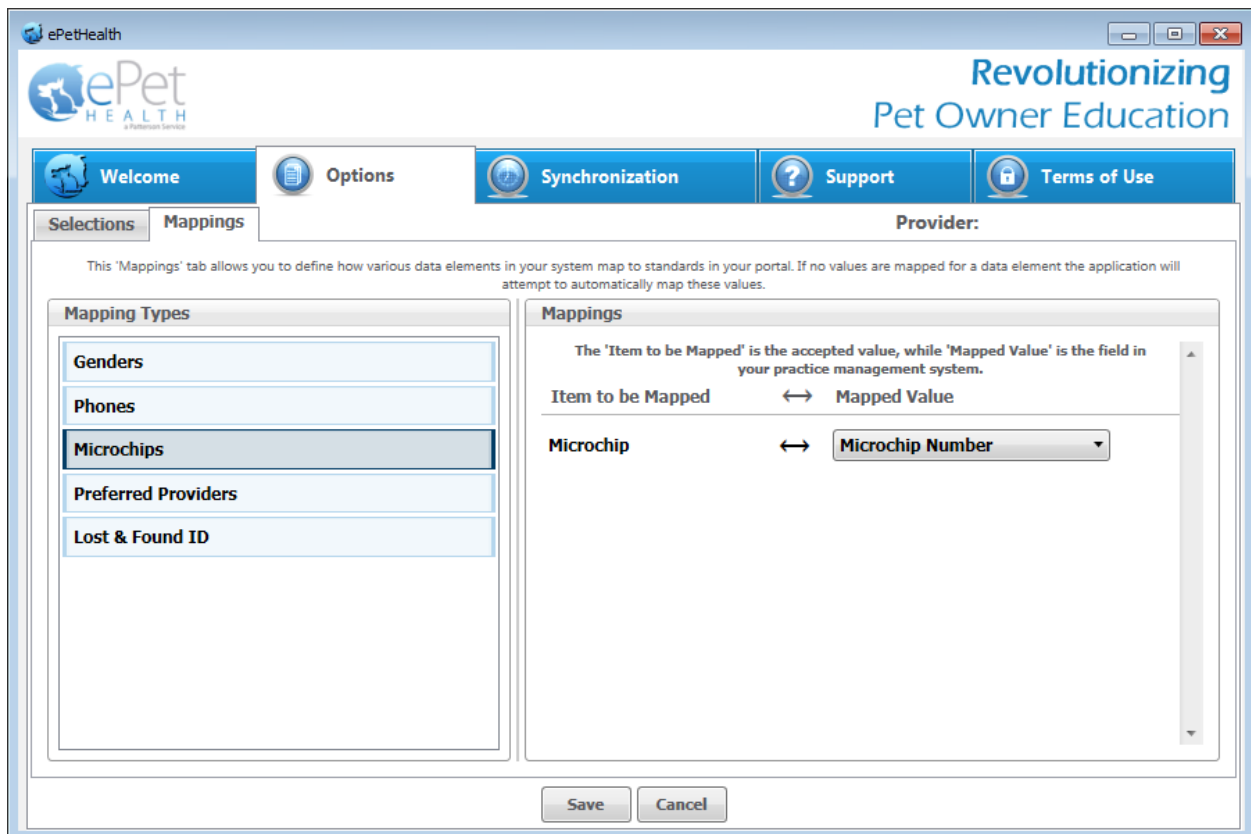
Item to be Mapped	↔	Mapped Value
-	↔	
? - ?	↔	
C - C	↔	
F - F	↔	Female
FI - FI	↔	
FS - FS	↔	Spayed Female
G - G	↔	Gelding
M - M	↔	Male
MN - MN	↔	Neutered Male

Save Cancel

- 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).

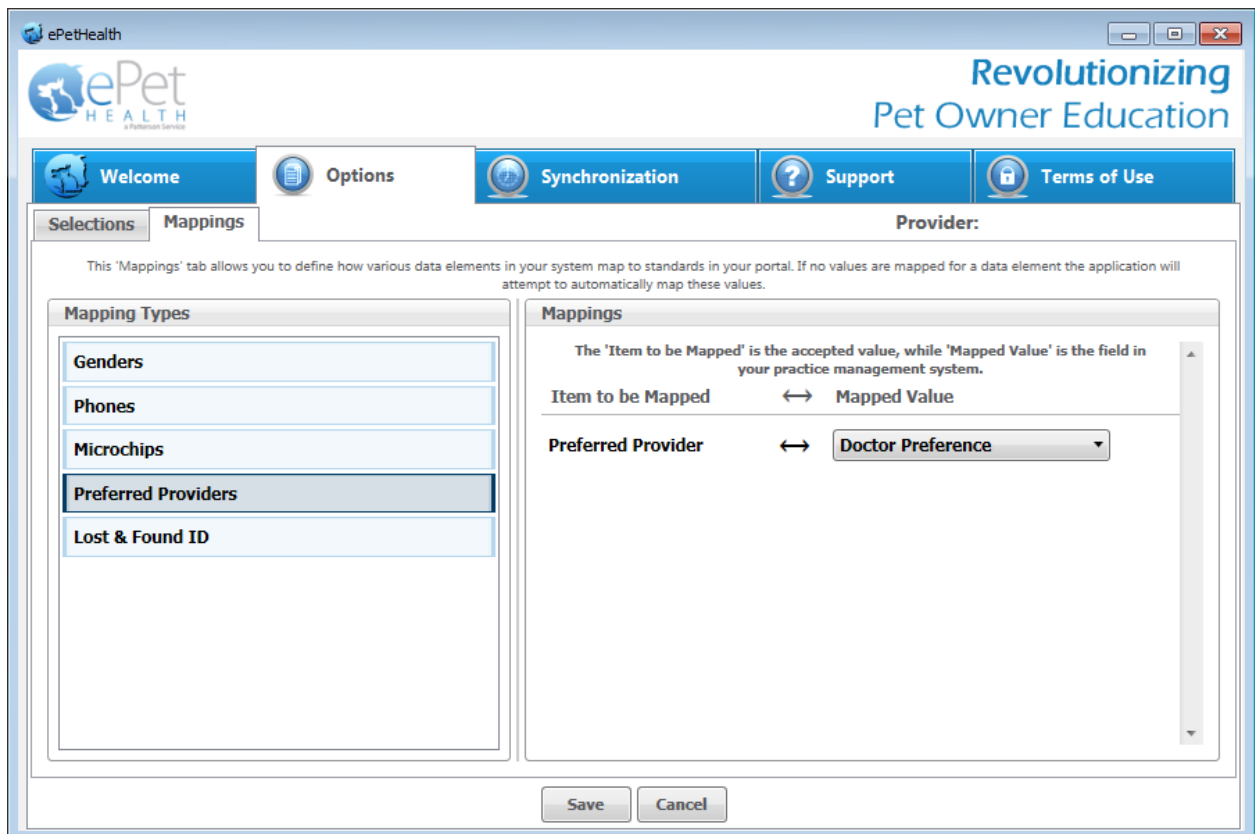


- Microchips:
  - The 'Item to be Mapped' is the accepted value.
  - The 'Mapped Value' is the value in the Practice Management System.
  - Mapped Values can be left blank if the corresponding Item to be Mapped is not to be shown in the Client Portal.
  - For example, the practice would need to designate 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.



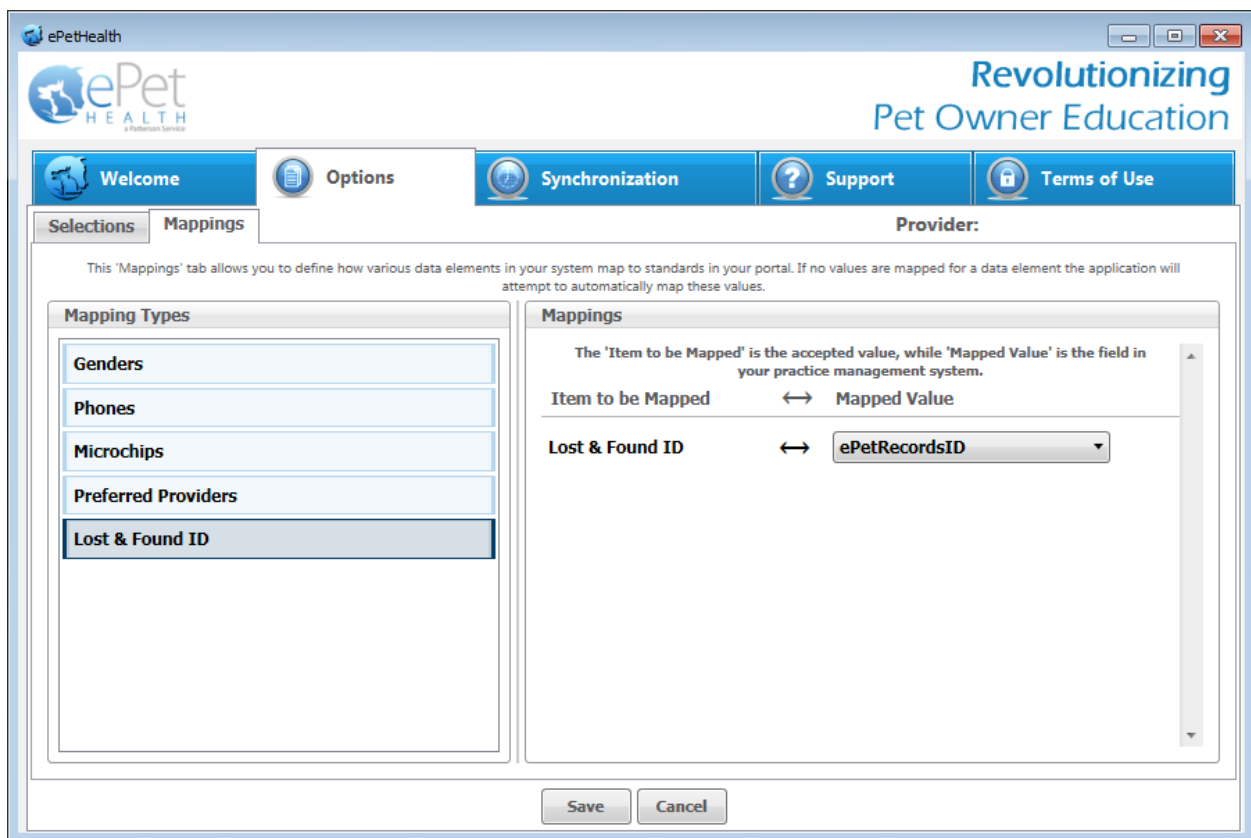
▪ Preferred Provider:

- 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>



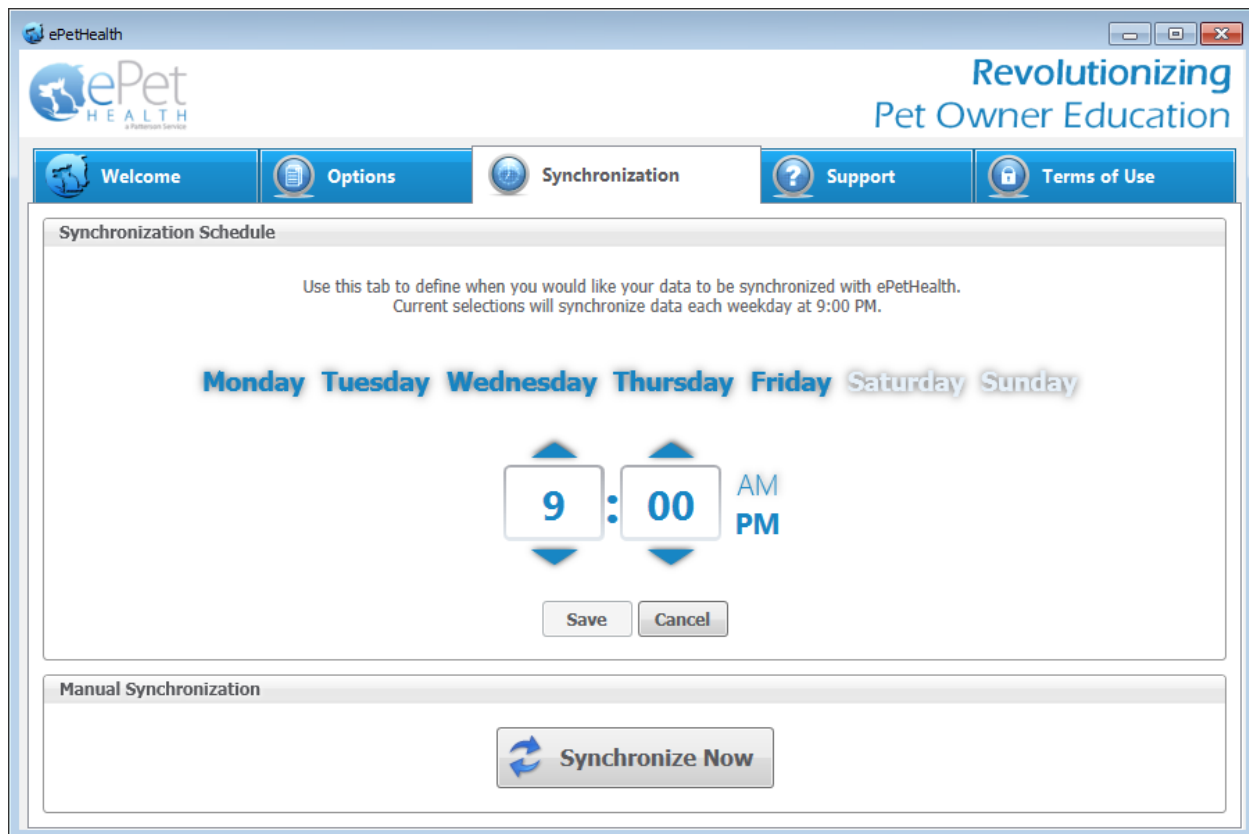
## Synchronization

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.

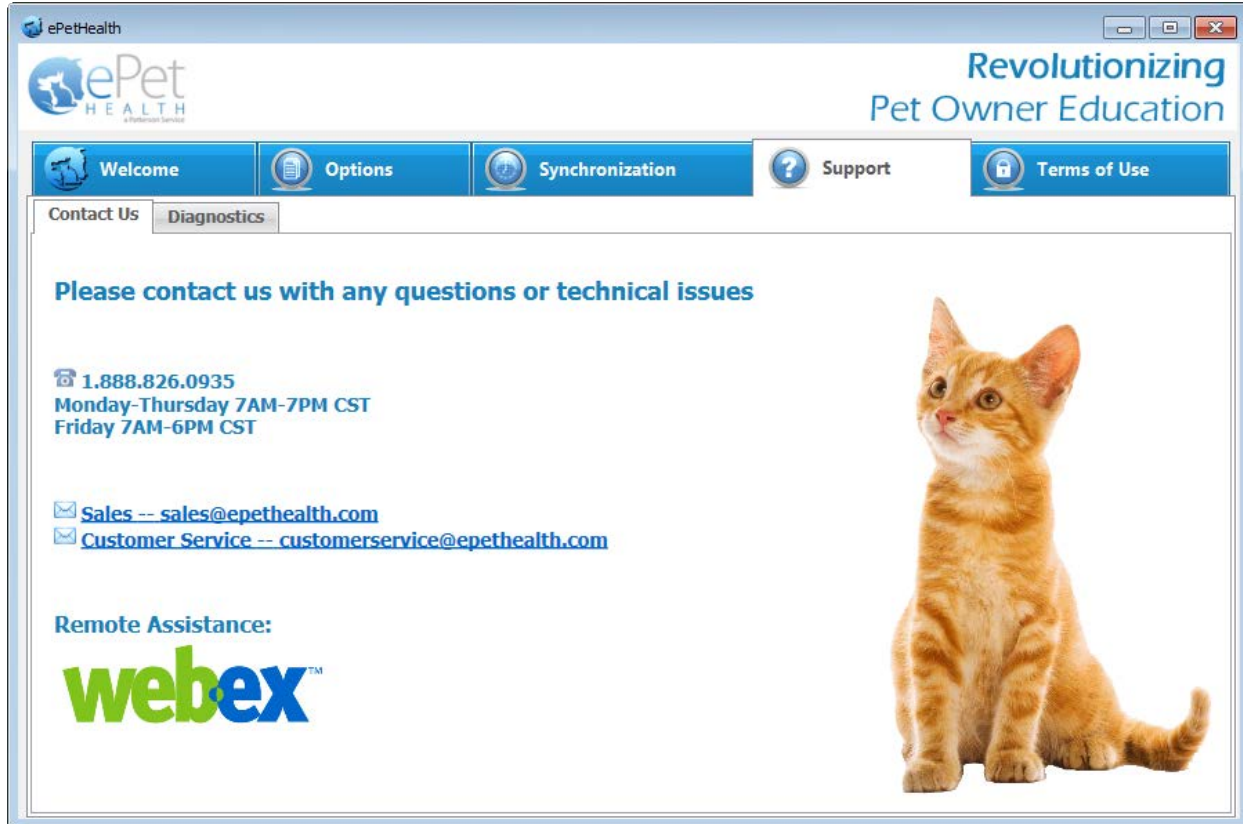
**NOTICE:** The Server must remain **turned ON** during the selected days/time to allow your practice's data to upload to ePetHealth. If the dashboard is installed on a workstation, both the workstation and the server computer must remain on.

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



The screenshot shows a web browser window titled "ePetHealth". The page header includes the ePet Health logo and the slogan "Revolutionizing Pet Owner Education". A navigation bar contains buttons for "Welcome", "Options", "Synchronization", "Support", and "Terms of Use". The "Contact Us" page is active, displaying the following information:

- Contact Us** | Diagnostics
- Please contact us with any questions or technical issues**
- Phone: 1.888.826.0935  
Monday-Thursday 7AM-7PM CST  
Friday 7AM-6PM CST
- Email: [Sales -- sales@epethealth.com](mailto:sales@epethealth.com)
- Email: [Customer Service -- customerservice@epethealth.com](mailto:customerservice@epethealth.com)
- Remote Assistance: 
- 

## 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:

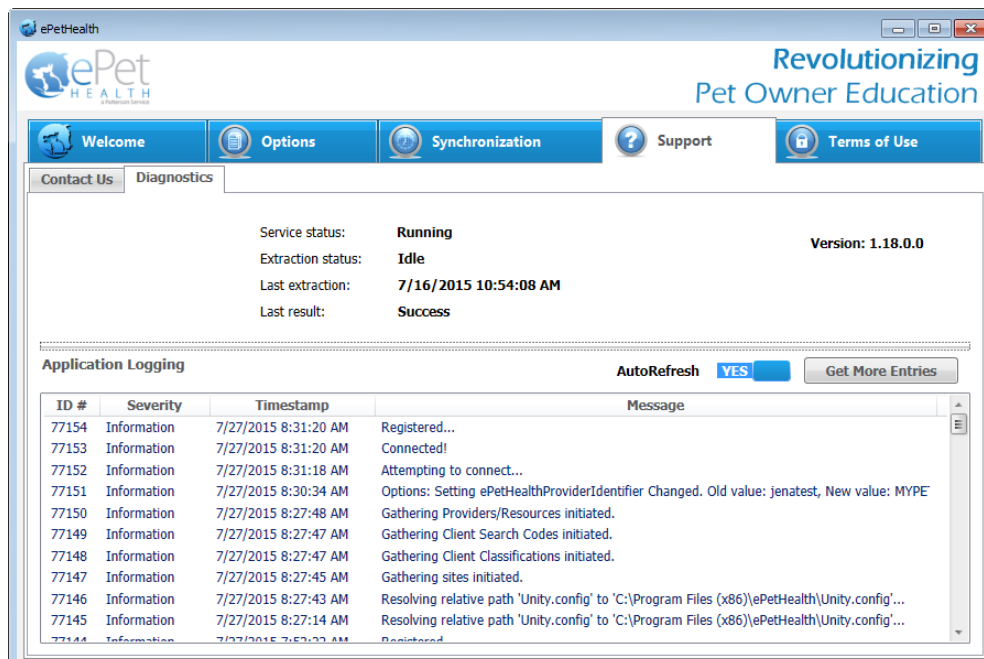
- Provides a list of the 100 most recent entries

### 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



The screenshot shows the ePetHealth dashboard interface. At the top, there is a navigation bar with buttons for Welcome, Options, Synchronization, Support, and Terms of Use. Below this, there are tabs for Contact Us and Diagnostics. The main content area displays the following information:

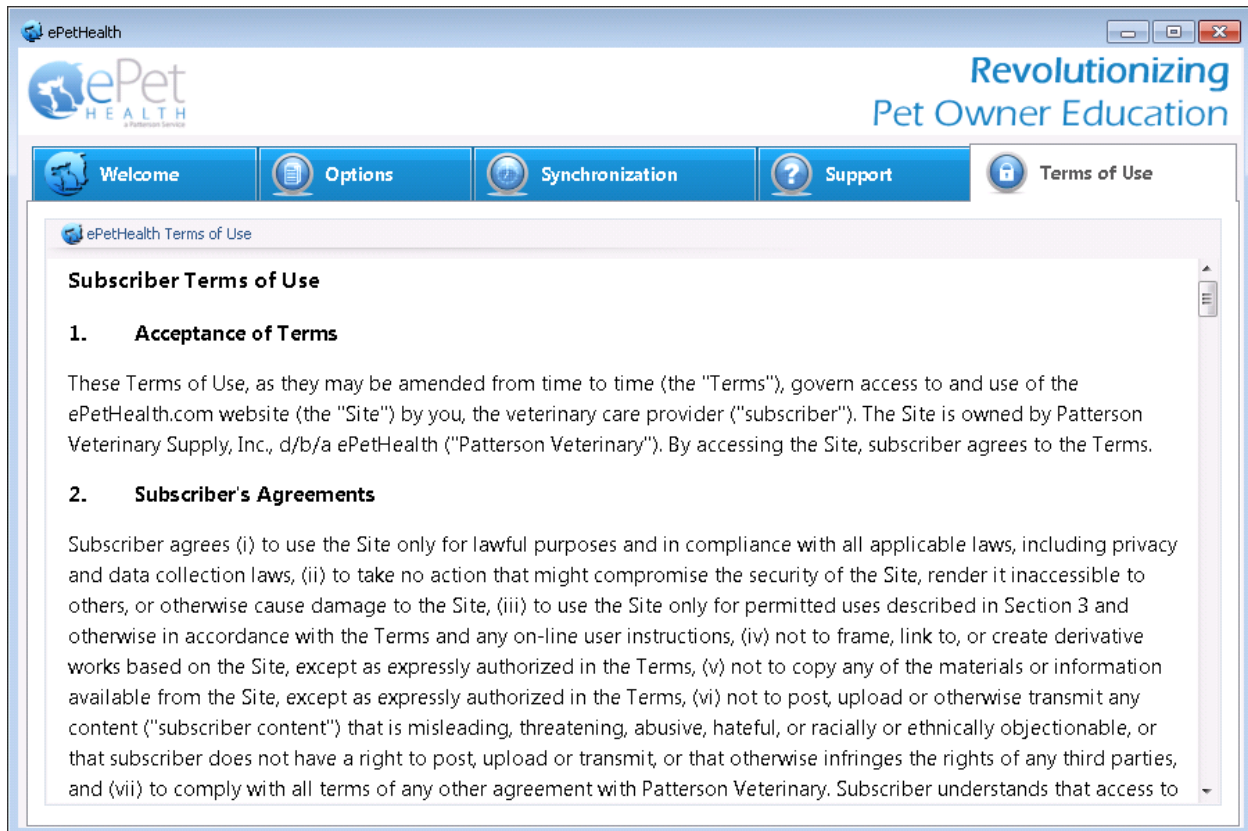
- Service status: **Running**
- Extraction status: **Idle**
- Last extraction: **7/16/2015 10:54:08 AM**
- Last result: **Success**
- Version: **1.18.0.0**

Below this information is the Application Logging section, which includes an AutoRefresh toggle set to YES and a Get More Entries button. The logging table contains the following entries:

ID #	Severity	Timestamp	Message
77154	Information	7/27/2015 8:31:20 AM	Registered...
77153	Information	7/27/2015 8:31:20 AM	Connected!
77152	Information	7/27/2015 8:31:18 AM	Attempting to connect...
77151	Information	7/27/2015 8:30:34 AM	Options: Setting ePetHealthProviderIdentifier Changed. Old value: jenatest, New value: MYPE
77150	Information	7/27/2015 8:27:48 AM	Gathering Providers/Resources initiated.
77149	Information	7/27/2015 8:27:47 AM	Gathering Client Search Codes initiated.
77148	Information	7/27/2015 8:27:47 AM	Gathering Client Classifications initiated.
77147	Information	7/27/2015 8:27:45 AM	Gathering sites initiated.
77146	Information	7/27/2015 8:27:43 AM	Resolving relative path 'Unity.config' to 'C:\Program Files (x86)\ePetHealth\Unity.config'...
77145	Information	7/27/2015 8:27:14 AM	Resolving relative path 'Unity.config' to 'C:\Program Files (x86)\ePetHealth\Unity.config'...
77144	Information	7/27/2015 8:27:03 AM	Registered.

## Terms of Use

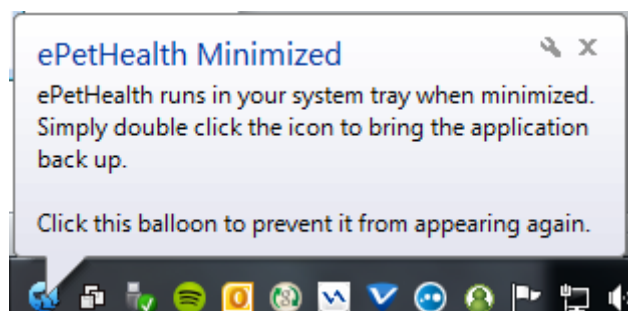
The Terms of Use tab displays the most current policies from ePetHealth.



## Program Closing/Minimizing:

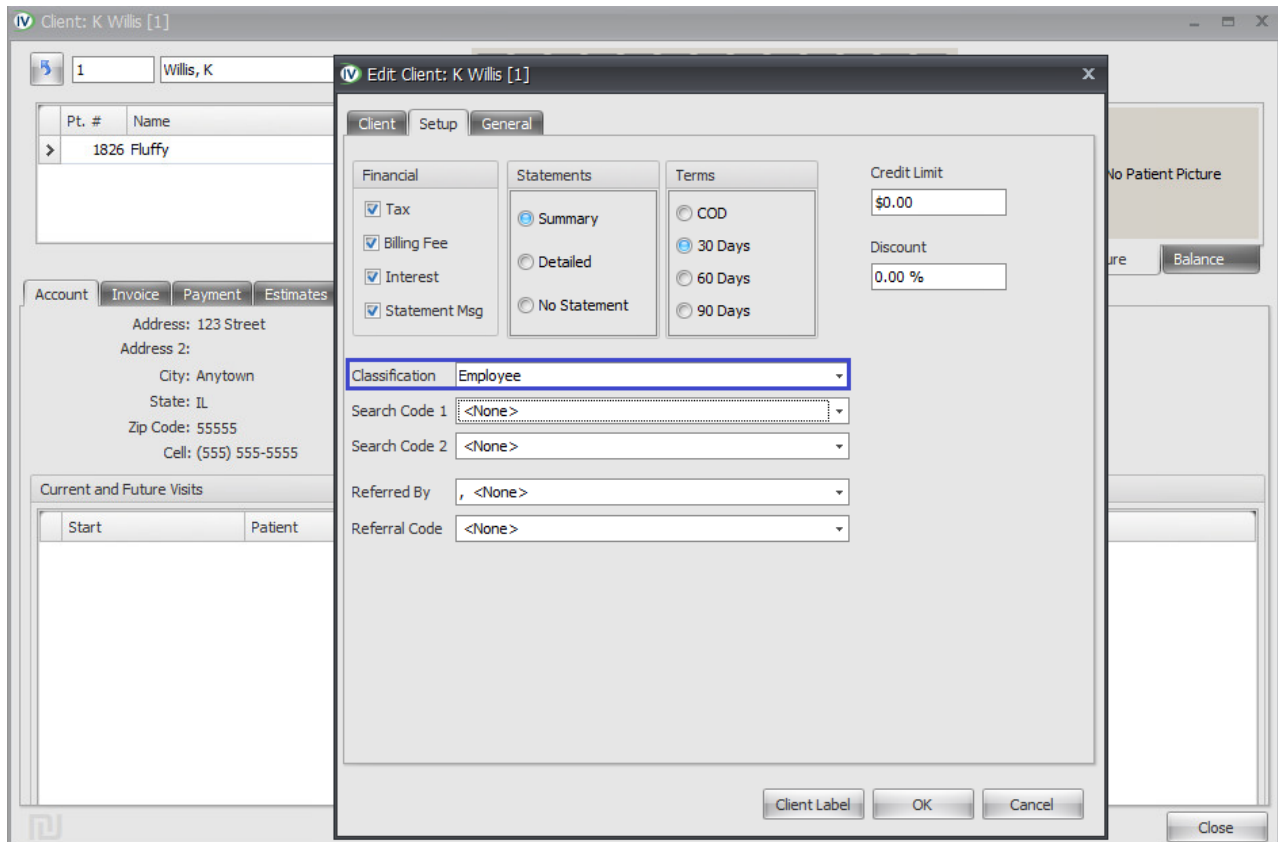
The ePetHealth application, when minimized, resides in the system tray. To launch the application, double-click the icon.

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



## IntraVet 4.5 Filter Data

### Classification Codes / Client Types



Client: K Willis [1]

1 Willis, K

Pt. #	Name
1826	Fluffy

Account Invoice Payment Estimates

Address: 123 Street  
Address 2:  
City: Anytown  
State: IL  
Zip Code: 55555  
Cell: (555) 555-5555

Current and Future Visits

Start	Patient
-------	---------

**Edit Client: K Willis [1]**

Client Setup General

Financial

- Tax
- Billing Fee
- Interest
- Statement Msg

Statements

- Summary
- Detailed
- No Statement

Terms

- COD
- 30 Days
- 60 Days
- 90 Days

Credit Limit: \$0.00

Discount: 0.00 %

Classification: Employee

Search Code 1: <None>

Search Code 2: <None>

Referred By: , <None>

Referral Code: <None>

Client Label OK Cancel

Close

## Appointment Filtering

C Willis - Appointment

Save and Close Additional... Client Appointments New Temp. Client

5018 Willis, C

Pt. #	Name
1758	CHARLOTTE
1726	DAVID
15	ELIZABETH
405	HENRY

Species: CANINE Weight: 9.80 lb  
 Breed: Chihuahua Mix DOB: 07/14/2006  
 Sex: FEMALE SPAYED Age: 6 yr  
 Color: Tan \_White Status: Active  
 Microchip:  
 Rabies Tag:

No Patient Picture

Picture Balance

CHARLOTTE

Provider: TE Technician, T  
 Client requested this provider specifically

Column: C Smith, DVM

Reason: EXAM & vaccines

Type: VACC Vaccination Appointment

Template:

Referring Provider: 1 Smith, Joe

Modality:

Date: 1/23/2013  Drop Off  
 Starts: 9:40 AM  Show in history before check in  
 Ends: 10:00 AM  
 Duration: 00:20

Reminders	Notes
VA125	DA2PP Adult Vaccination 02/08/2008
VA105	Rabies Canine 3 Year 02/08/2008

**Warning: This client has 1 no show(s)!**