



► Veterinarians
► Pet Owners

Email

first-time login?
email not registered?

Password

forgot password?



ePetHealth Dashboard
V-Tech Platinum

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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 V-Tech Platinum from the PMS Menu
 - V-Tech Platinum is supported for Database version 1.0.82 and above of PLATINUM ONLY.
- 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 V-Tech Platinum, 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.

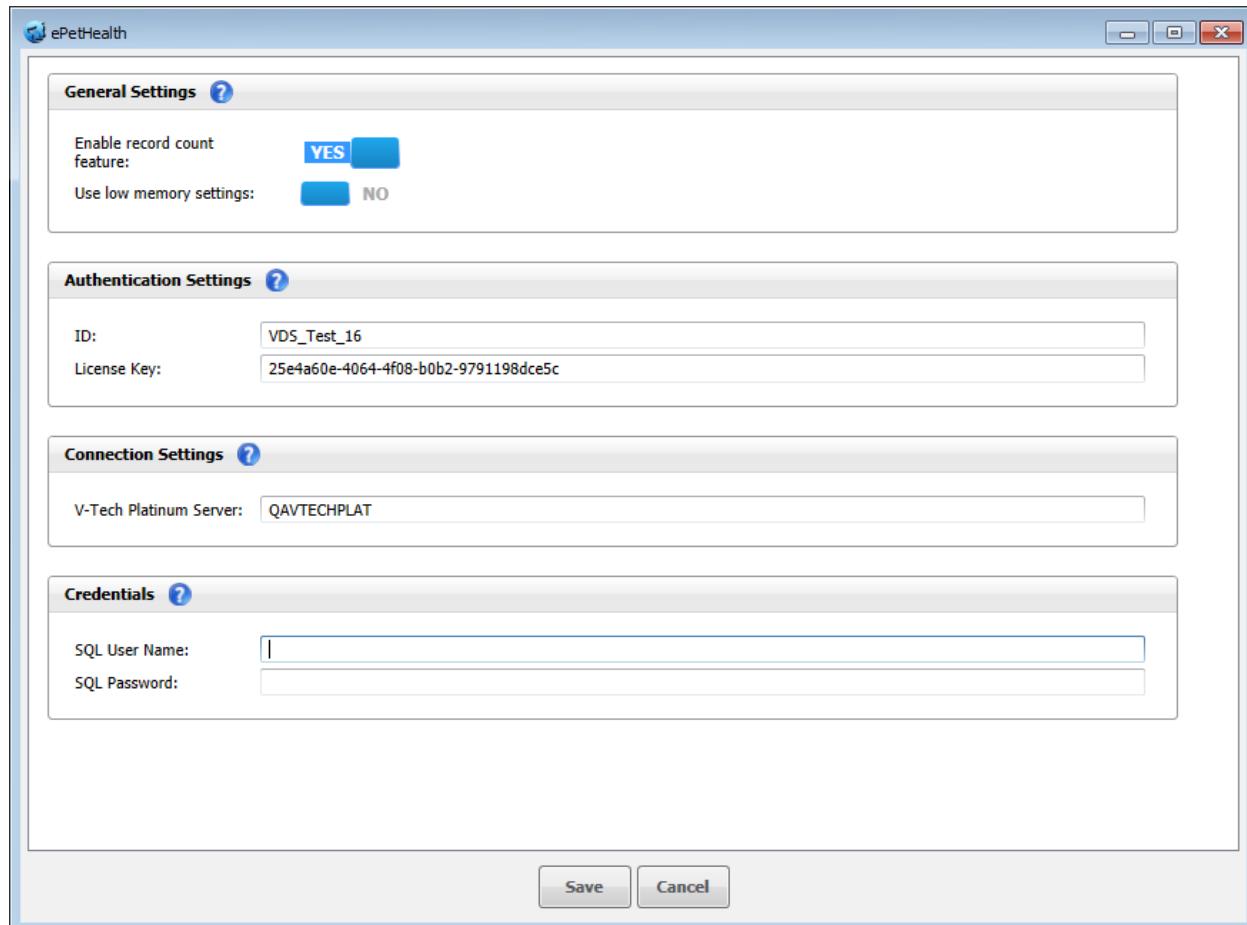
Connection Settings

- **V-Tech Platinum Server:** Enter the server / workstation name as it appears on the computer that the ePetHealth Dashboard is being installed on.

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

Credentials

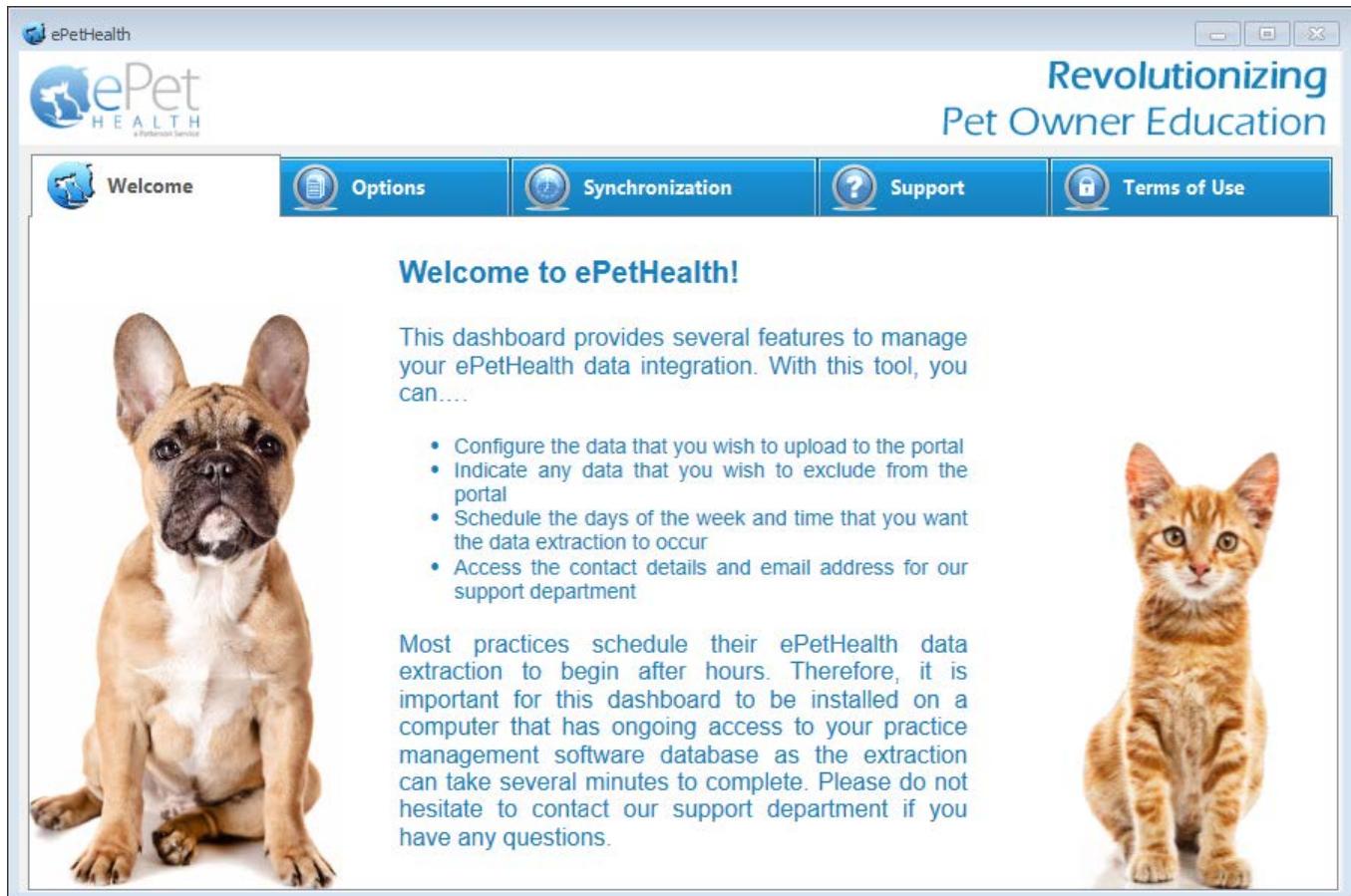
- **SQL User Name:** Enter the username required to log into MySQL Server.
- **SQL Password:** Enter the password required to log into MySQL Server.



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.



Welcome to ePetHealth!

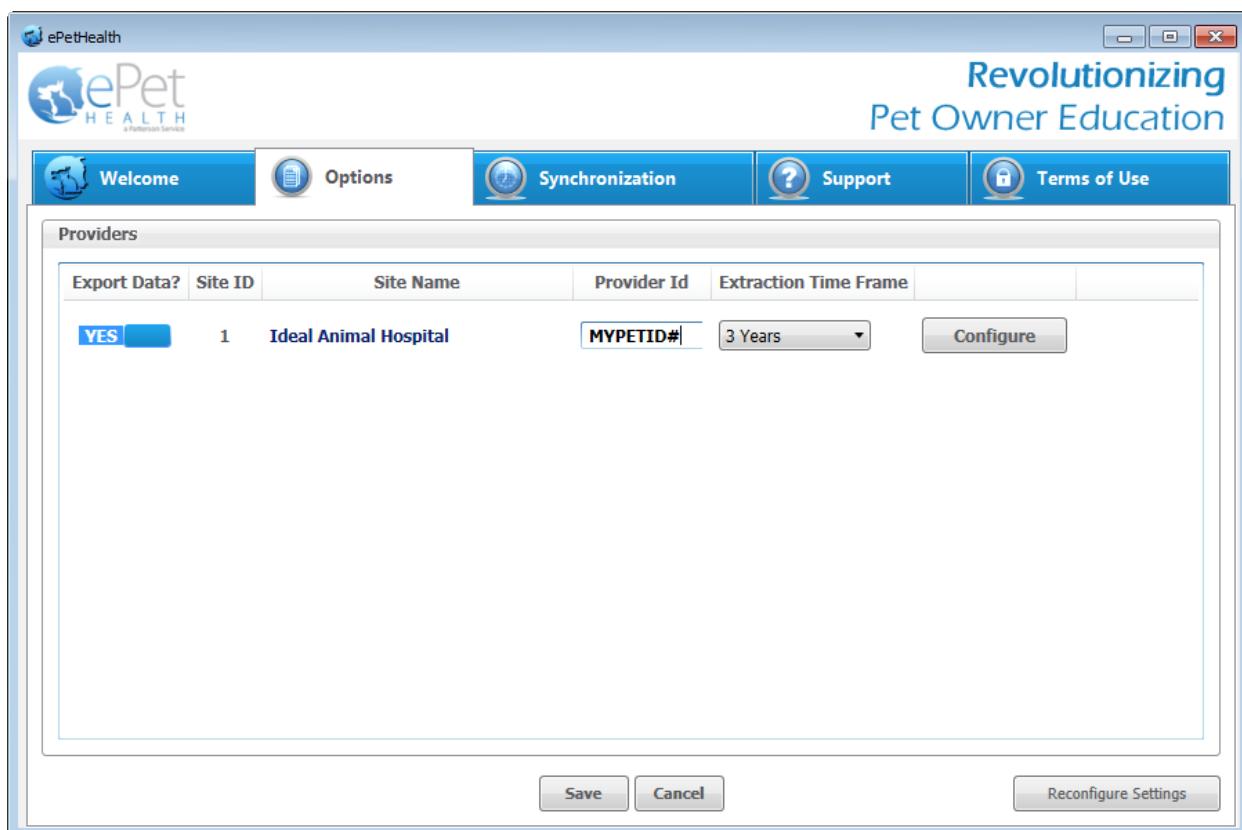
This dashboard provides several features to manage your ePetHealth data integration. With this tool, you can....

- Configure the data that you wish to upload to the portal
- Indicate any data that you wish to exclude from the portal
- Schedule the days of the week and time that you want the data extraction to occur
- Access the contact details and email address for our support department

Most practices schedule their ePetHealth data extraction to begin after hours. Therefore, it is important for this dashboard to be installed on a computer that has ongoing access to your practice management software database as the extraction can take several minutes to complete. Please do not hesitate to contact our support department if you have any questions.

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.
- V-Tech Platinum does not have multi-site functionality. As a result, all data extracted will be considered to be that of a single practice.
- 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

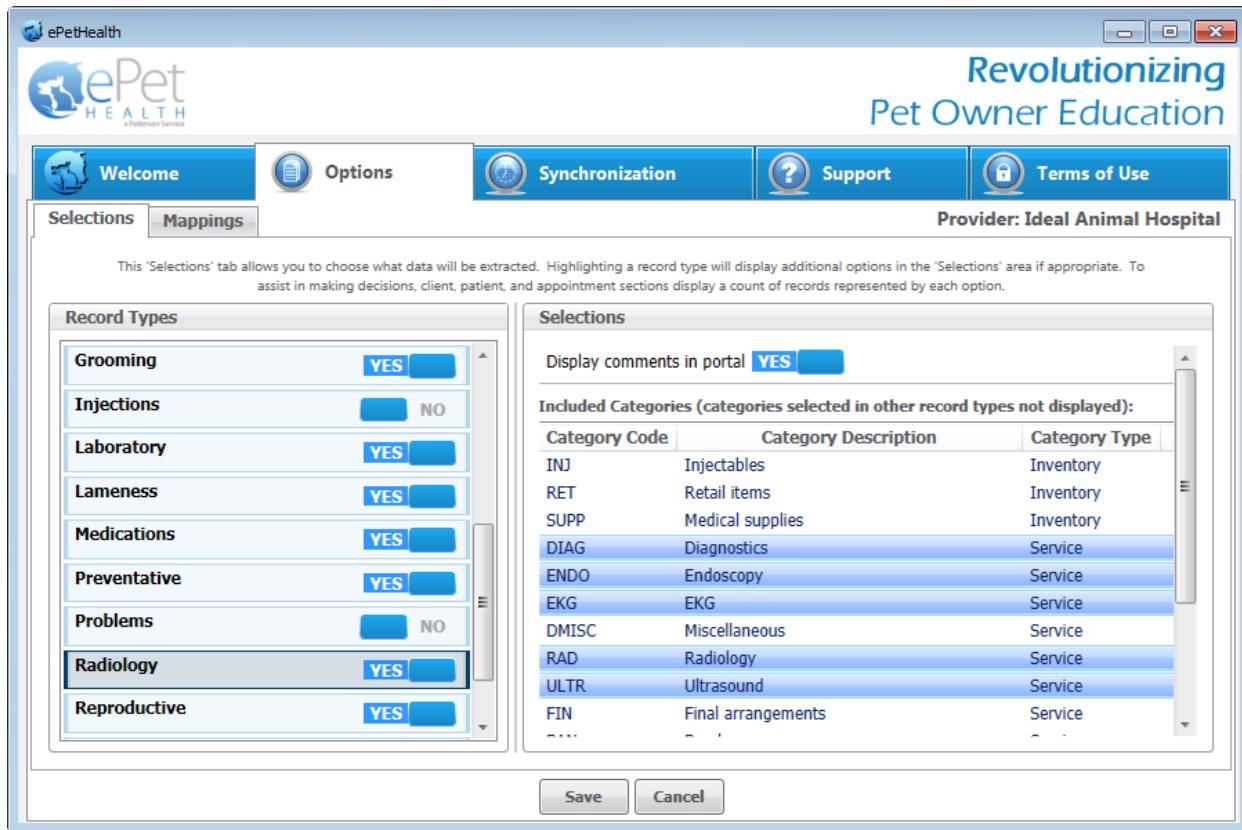
Click on the Configure button from the Options tab to configure the data that will be extracted from the practice database.

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.

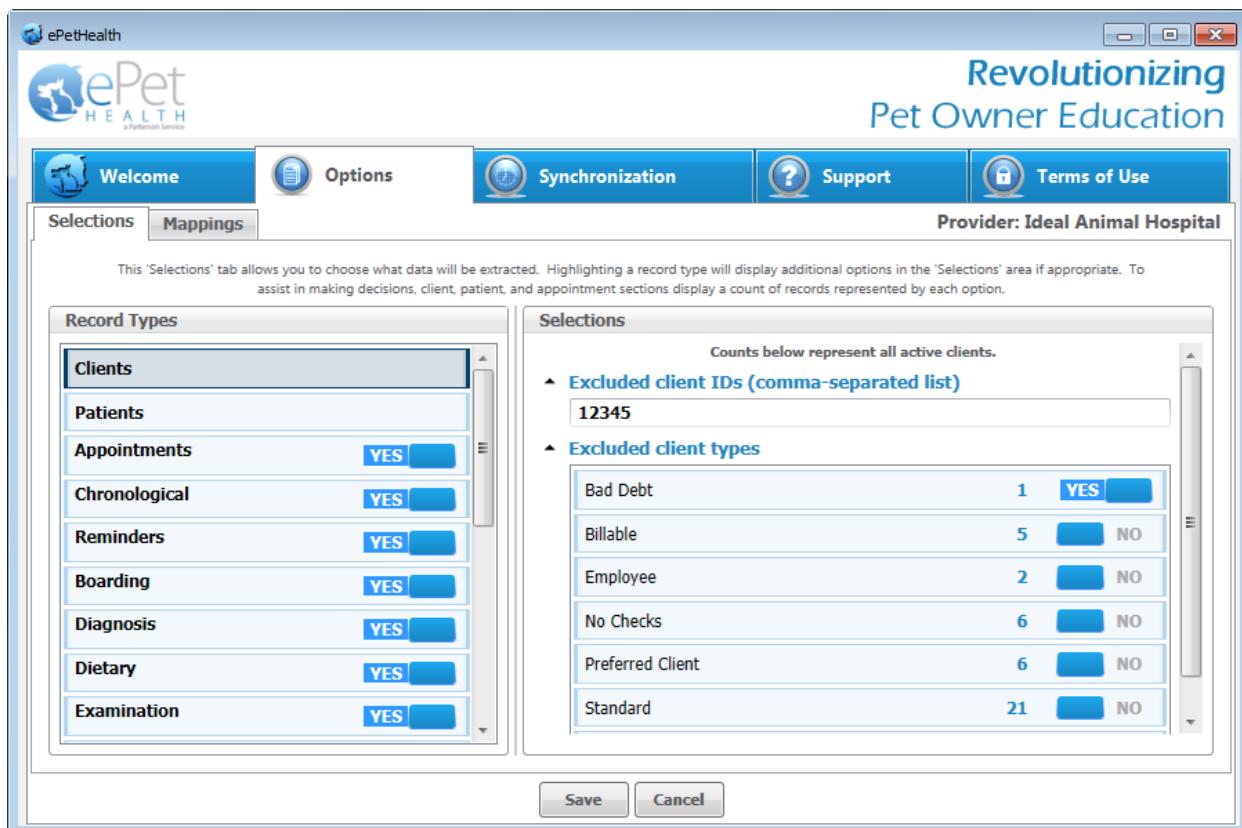


This 'Selections' tab allows you to choose what data will be extracted. Highlighting a record type will display additional options in the 'Selections' area if appropriate. To assist in making decisions, client, patient, and appointment sections display a count of records represented by each option.

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
...

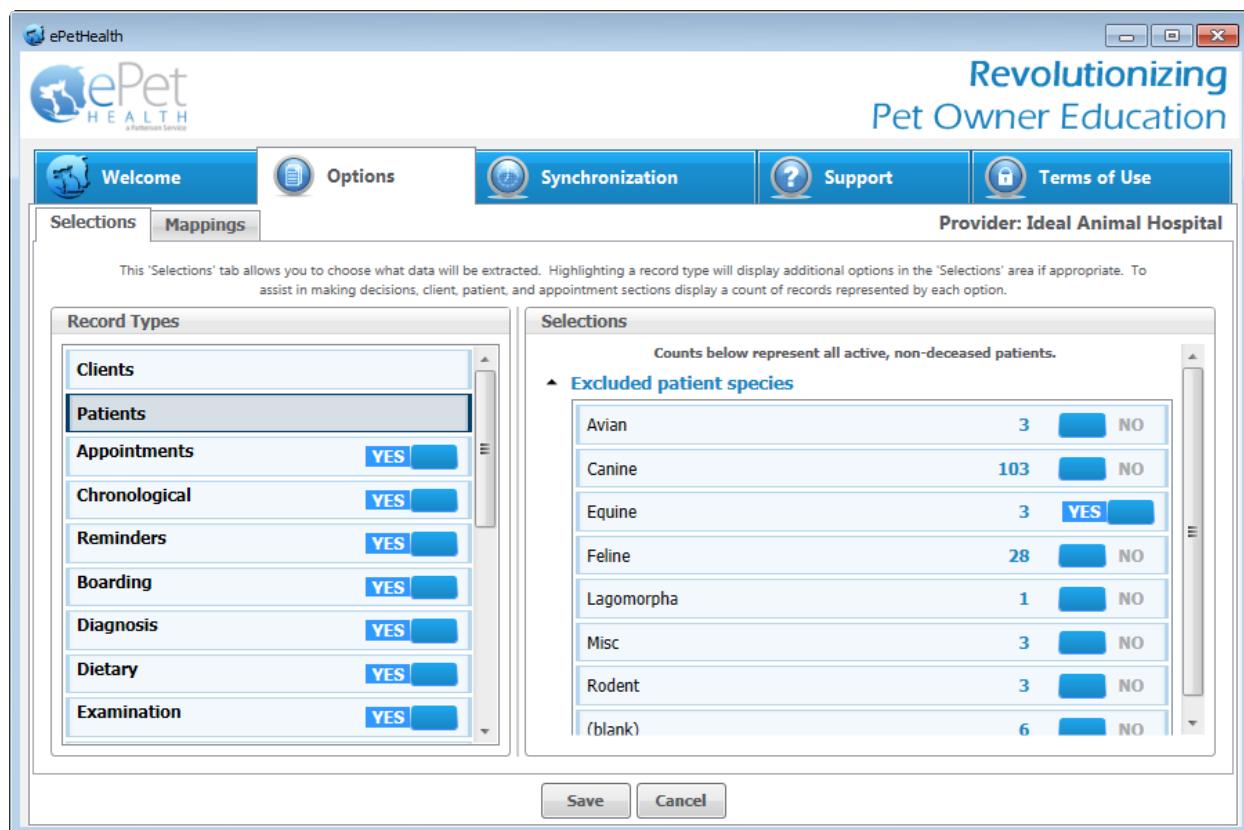
Client Selections

- 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.

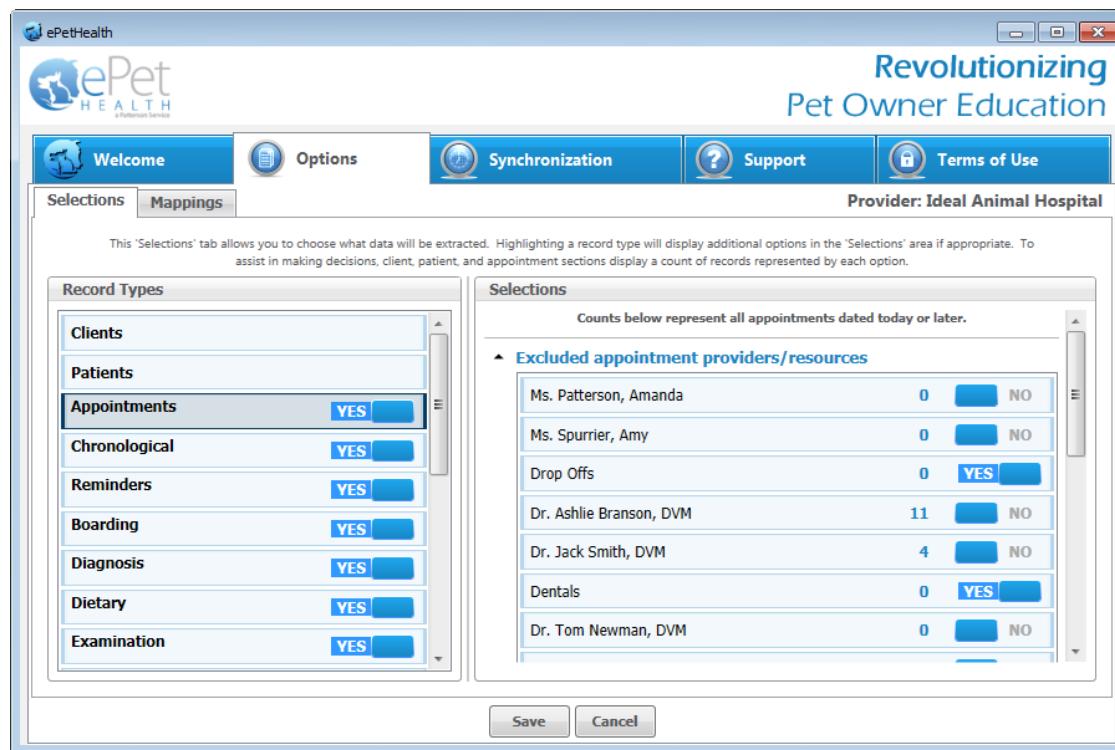


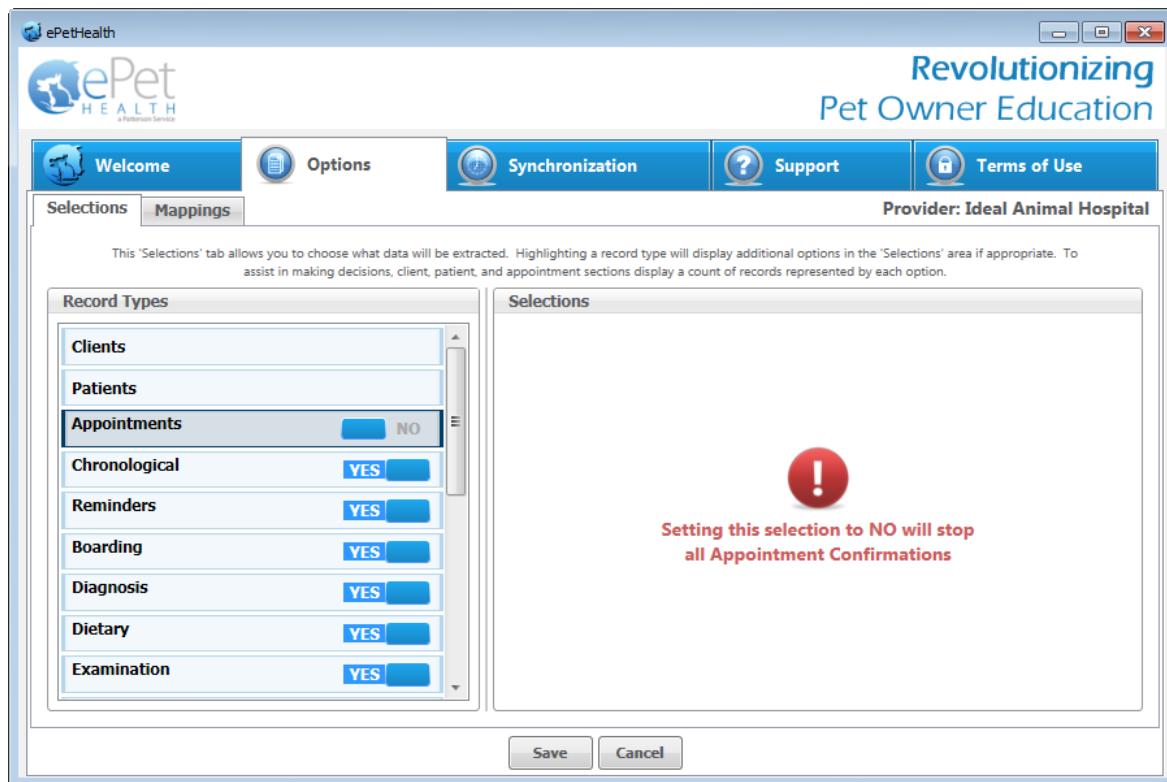
Appointment Selections

- 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

All appointments are included by default. V-Tech Platinum does not support appointment types, reasons, statuses or tracking statuses.

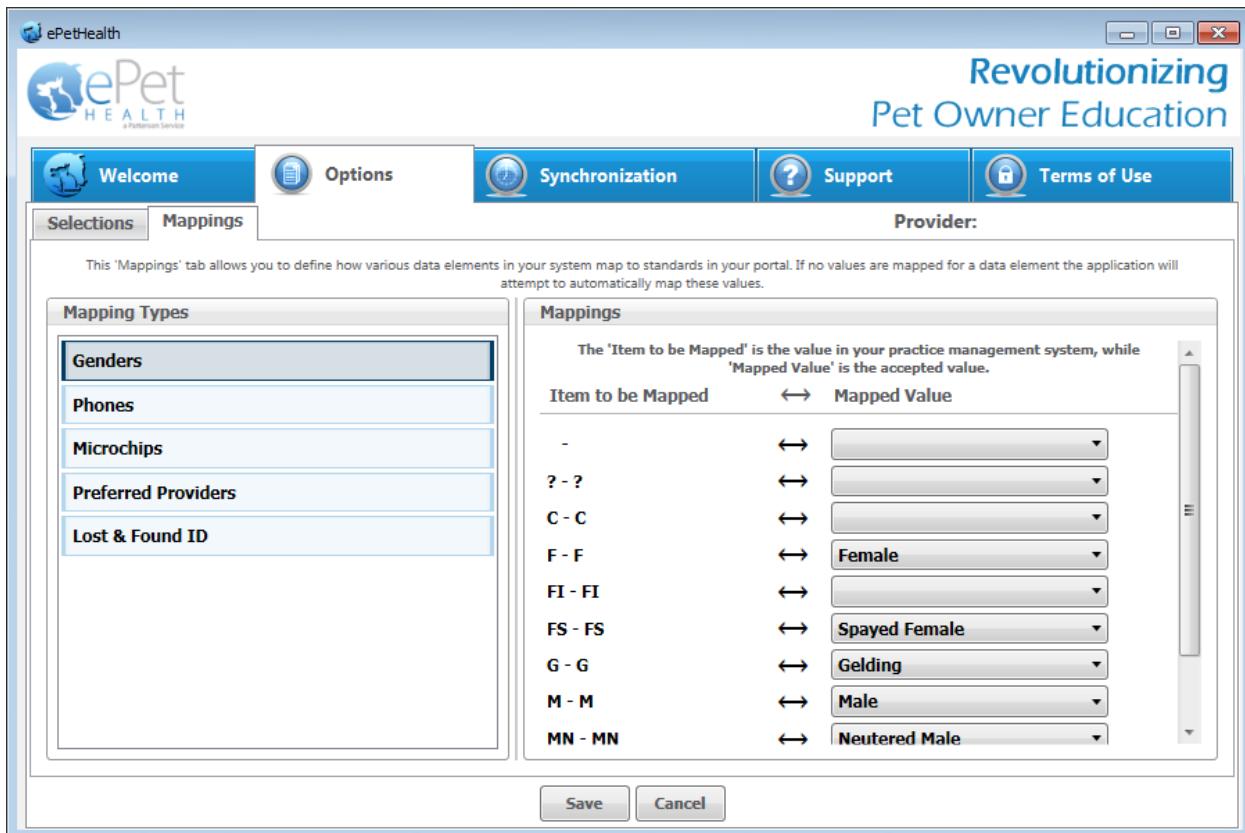
- All appointments with excluded criteria will not be included in the synchronization and will not be viewable in the ePetHealth Client Portal.
- All appointments will be included in the synchronization if the appointment filtering options are left to the default ('no' to include) in a new installation.
- 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.





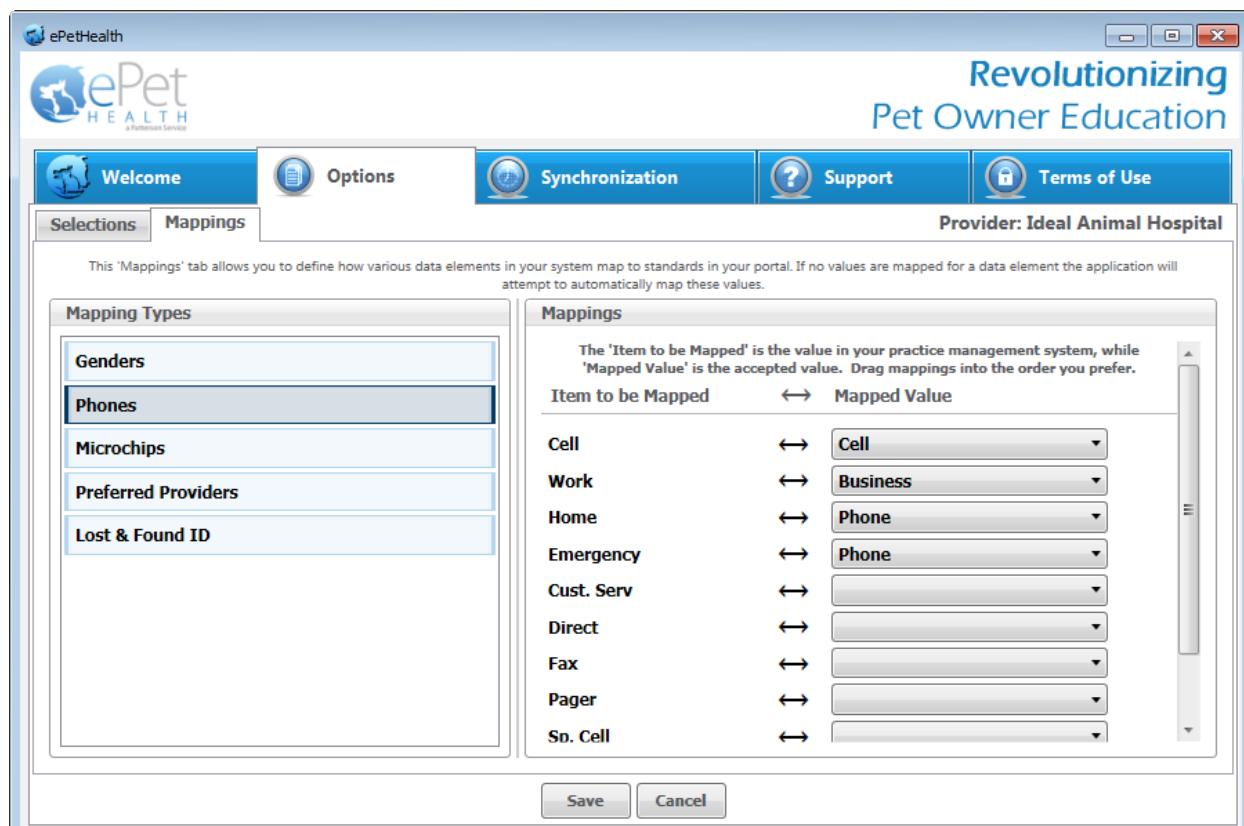
Mappings

- 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).



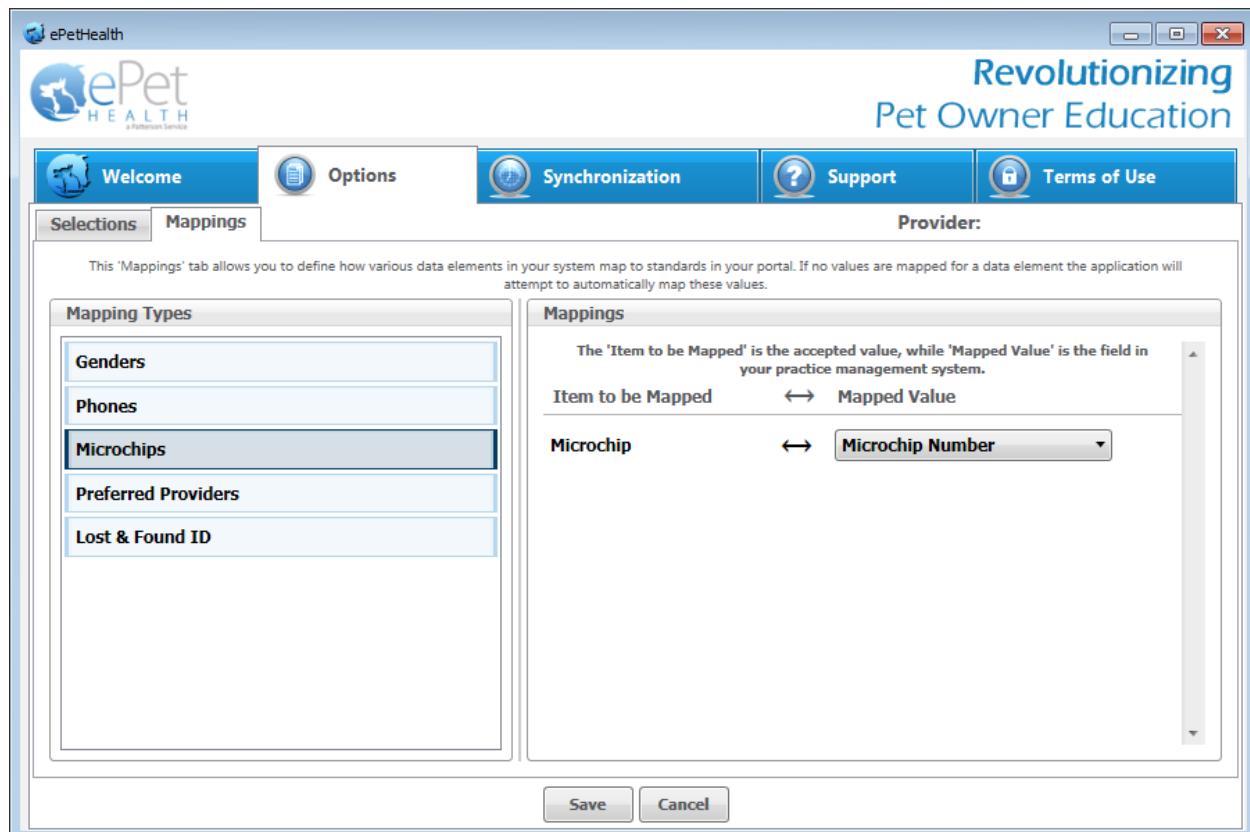
Item to be Mapped	Mapped Value
-	
? - ?	
C - C	
F - F	Female
FI - FI	
FS - FS	Spayed Female
G - G	Gelding
M - M	Male
MN - MN	Neutered Male

- 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).



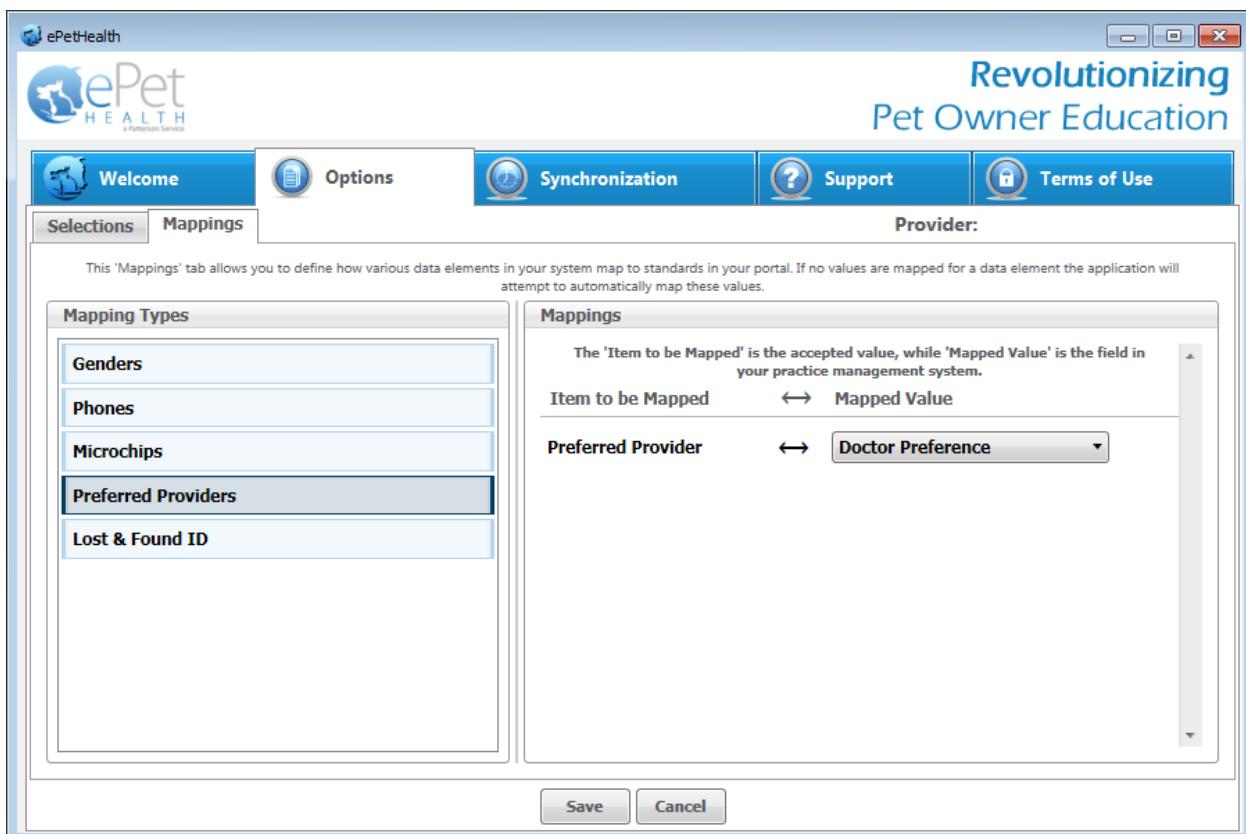
Item to be Mapped	↔	Mapped Value
Cell	↔	Cell
Work	↔	Business
Home	↔	Phone
Emergency	↔	Phone
Cust. Serv	↔	
Direct	↔	
Fax	↔	
Pager	↔	
So. Cell	↔	

- 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.

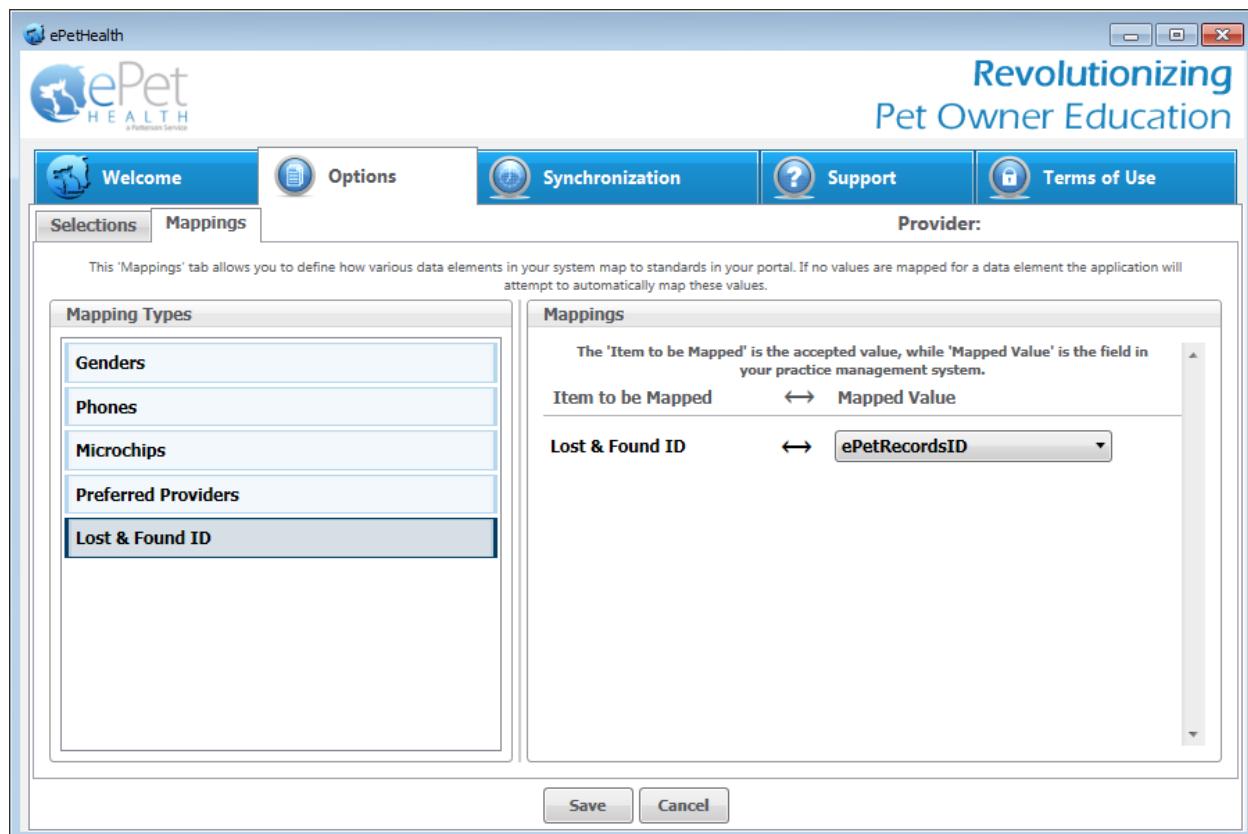


▪ Preferred Provider:

- 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>



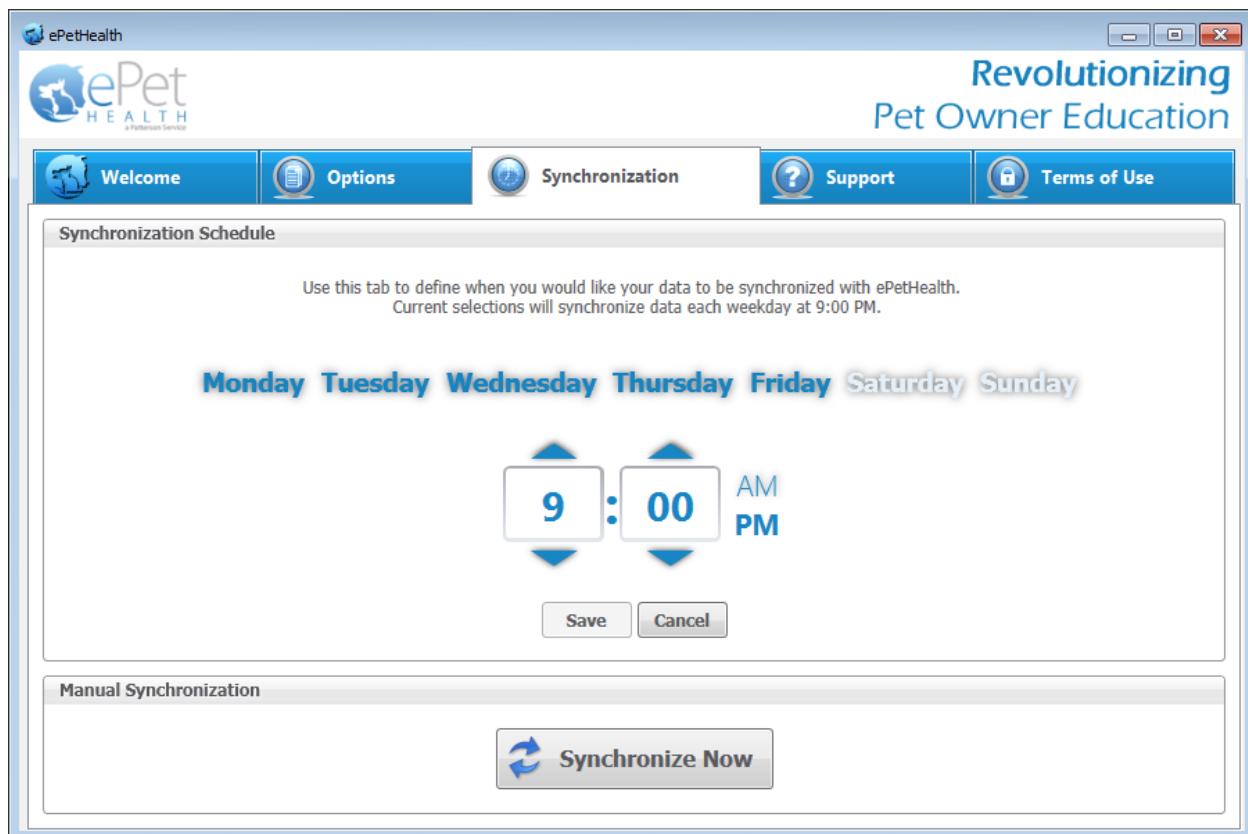
Synchronization

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.

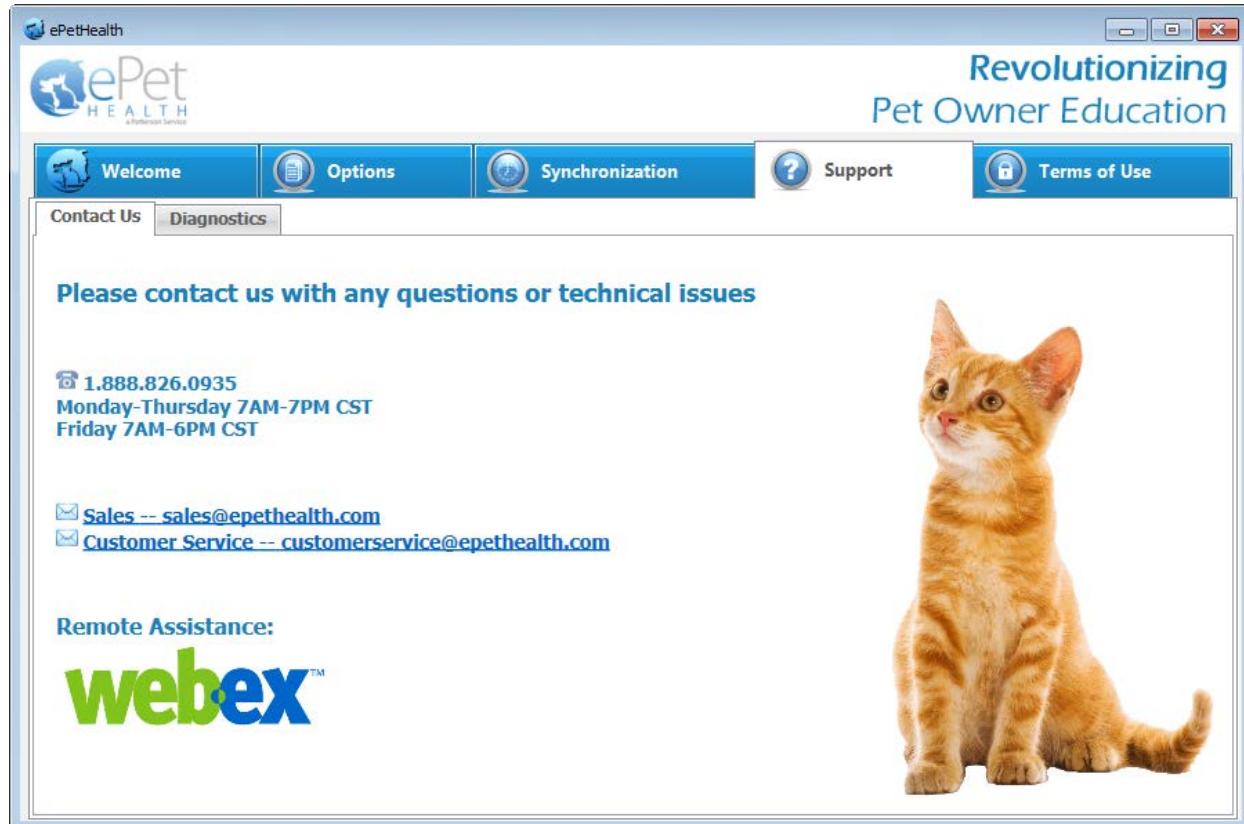
NOTICE: The Server must remain turned ON during the selected days/time to allow your practice's data to upload to ePetHealth. If the dashboard is installed on a workstation, both the workstation and the server computer must remain on.

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 the ePet Health software interface. At the top, there is a banner with the text "Revolutionizing Pet Owner Education". Below the banner, the main menu bar includes "Welcome", "Options", "Synchronization", "Support" (which is currently selected), and "Terms of Use". Under the "Support" menu, there are two sub-options: "Contact Us" and "Diagnostics", with "Contact Us" being the active one. The main content area contains a message: "Please contact us with any questions or technical issues". It provides a phone number (1.888.826.0935) and operating hours (Monday-Thursday 7AM-7PM CST, Friday 7AM-6PM CST). It also lists two email addresses: Sales -- sales@epethealth.com and Customer Service -- customerservice@epethealth.com. Below this, there is a section for "Remote Assistance" featuring the Webex logo. To the right of the text, there is a photograph of a ginger tabby kitten sitting and looking up.

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:

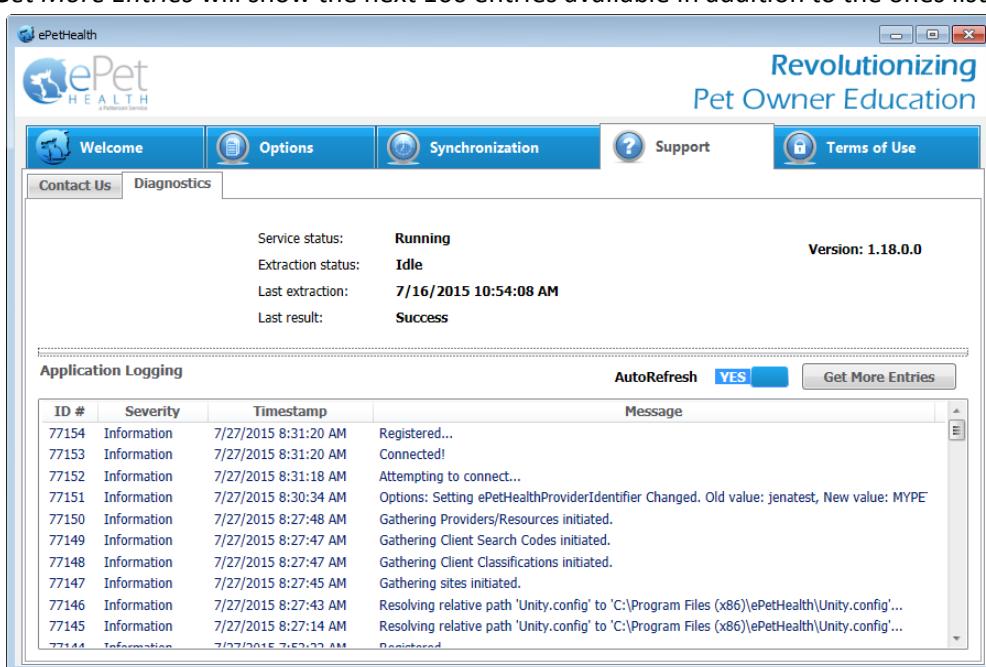
- Provides a list of the 100 most recent entries

AutoRefresh:

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

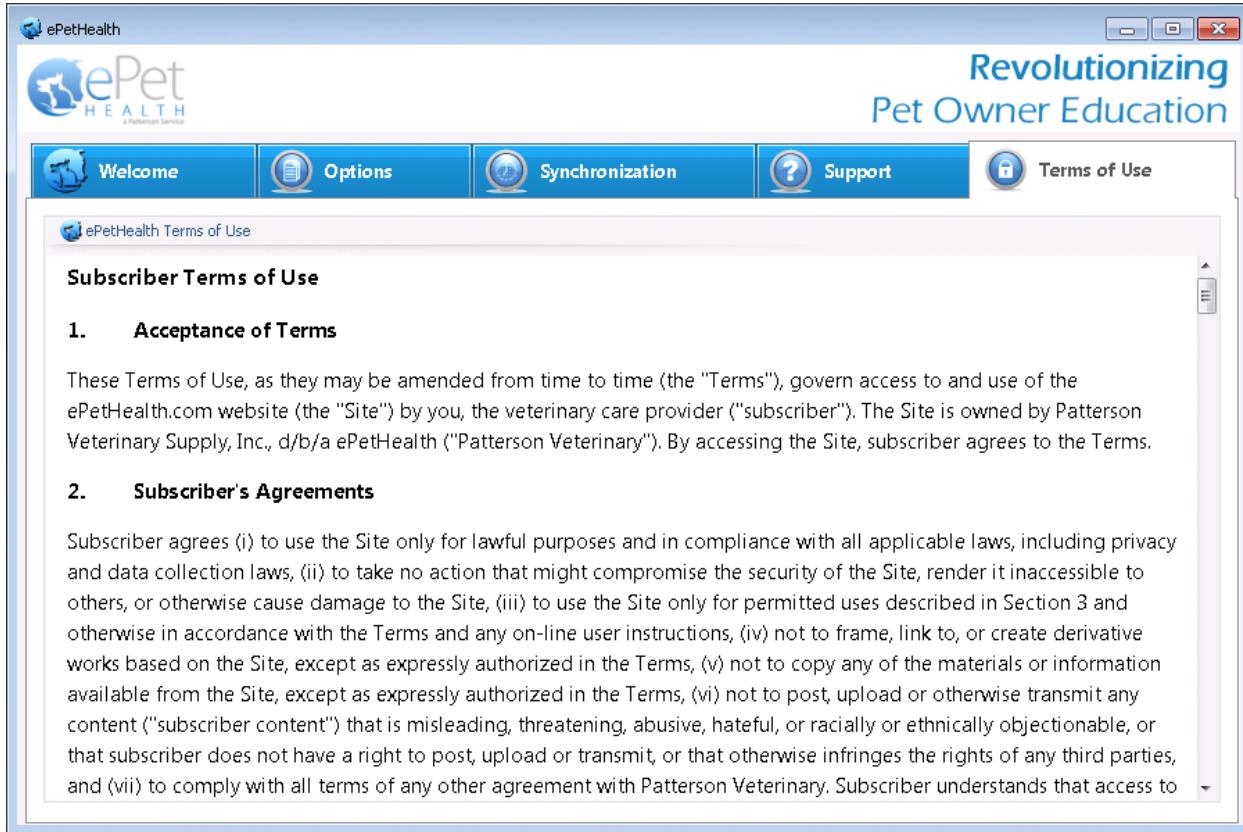
Get More Entries:

- 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.



The screenshot shows the ePetHealth application window. The title bar reads "ePetHealth" and "Revolutionizing Pet Owner Education". The menu bar includes "Welcome", "Options", "Synchronization", "Support", and "Terms of Use". The "Terms of Use" tab is selected, displaying the "Subscriber Terms of Use" document. The document content is as follows:

Subscriber Terms of Use

1. Acceptance of Terms

These Terms of Use, as they may be amended from time to time (the "Terms"), govern access to and use of the ePetHealth.com website (the "Site") by you, the veterinary care provider ("subscriber"). The Site is owned by Patterson Veterinary Supply, Inc., d/b/a ePetHealth ("Patterson Veterinary"). By accessing the Site, subscriber agrees to the Terms.

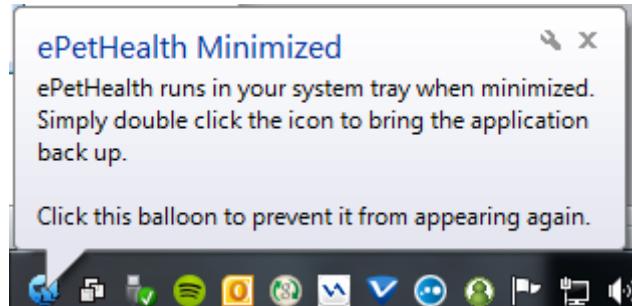
2. Subscriber's Agreements

Subscriber agrees (i) to use the Site only for lawful purposes and in compliance with all applicable laws, including privacy and data collection laws, (ii) to take no action that might compromise the security of the Site, render it inaccessible to others, or otherwise cause damage to the Site, (iii) to use the Site only for permitted uses described in Section 3 and otherwise in accordance with the Terms and any on-line user instructions, (iv) not to frame, link to, or create derivative works based on the Site, except as expressly authorized in the Terms, (v) not to copy any of the materials or information available from the Site, except as expressly authorized in the Terms, (vi) not to post, upload or otherwise transmit any content ("subscriber content") that is misleading, threatening, abusive, hateful, or racially or ethnically objectionable, or that subscriber does not have a right to post, upload or transmit, or that otherwise infringes the rights of any third parties, and (vii) to comply with all terms of any other agreement with Patterson Veterinary. Subscriber understands that access to

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.



V-Tech Platinum Filter Data

Classification Codes / Client Types

- Classification Codes / Client types are identified by color codes within the Practice Management System
- The color code will also change the background of the specified client

Last Appointment	7/29/2011
First Appointment	12/5/2002
Type Client	16711680
Referred By	<input type="checkbox"/>
Doctor Number	0

Appointment Filtering

- Navigate to Main | Appointment
- Locate the *Employee* option in the middle of the screen

Date	04/22/13	Start Time	02:20 PM
Client's Doctor			
Client Number	632	Brenda Aaron	
Pet Number			
Employee			

1	2	3	4	5	6	7	8	9	0	()
Q	W	E	R	T	Y	U	I	O	P		
A	S	D	F	G	H	J	K	L	;	<-	<-
Z	X	C	V	B	N	M	-	.	esc		
Space Bar											

Like

Switch Lookup Column

Lastname	firstname	Initial
Appointments		
B	Aurelia	
B	Annette	
Carry To	Back	
Drop	Off	
F	Charles	
G	Amanda	
G	Amanda	
H	Stephanie	
...	...	