



EquiHealth Dashboard

AVImark



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



Introduction

The EquiHealth 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 EquiHealth Dashboard installation file:

[Setup for EquiHealth](#)

- Run the EquiHealth Setup.exe
- Select AVImark from the PMS Menu
 - AVImark versions 128 and above are supported
- Default Installation Directories:
 - For 32-bit machines, C:\Program Files\EquiHealth
 - For 64-bit machines, C:\Program Files (x86)\EquiHealth

Authentication | Configuration

When prompted, enter the ID and License Key created by Patterson Veterinary to activate the EquiHealth 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, 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 EquiHealth 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 EquiHealth Dashboard.
- **License Key:** Created by Patterson Veterinary and is required to activate the EquiHealth Dashboard.

Connection Settings

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



Credentials

- **Network User Name:** This should be left blank unless the default value has been changed. In which case, enter the new username.
- **Network Password:** This should be left blank unless the default value has been changed. In which case, enter the new password.

The screenshot shows the EquiHealth settings window. The 'General Settings' section has two options: 'Enable record counts' and 'Use low memory settings', both with a dark red toggle and the text 'NO'. The 'Authentication Settings' section has two text boxes: 'ID' containing 'DocuTest' and 'License Key' containing '37d5a289-07f5-41ec-96ca-7bd6a03b6f75'. The 'Connection Settings' section has a text box for 'AVImark Path' containing 'c:\avimark' and a browse button. The 'Credentials' section has two empty text boxes for 'Network User Name' and 'Network Password'. At the bottom of the window are 'Save' and 'Cancel' buttons.



Functionality

Welcome

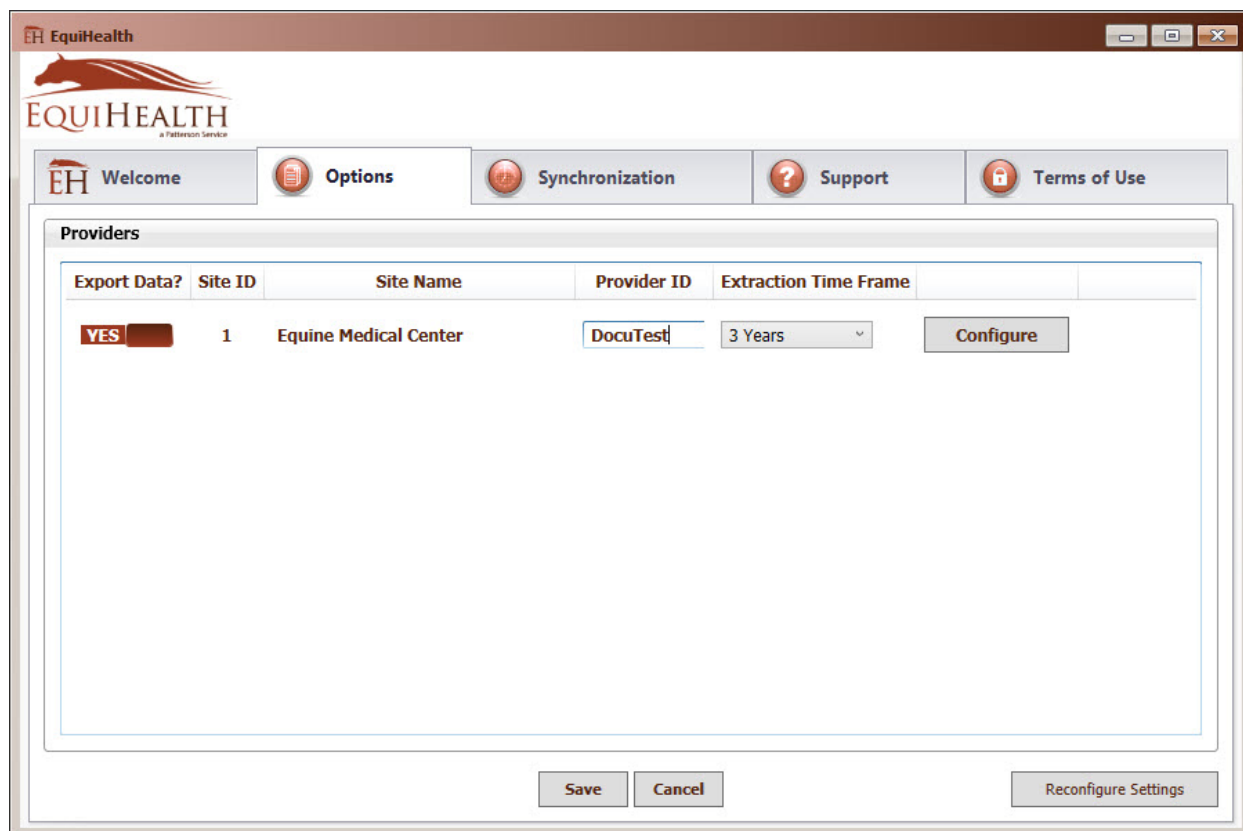
The Welcome tab displays several features that the EquiHealth dashboard offers and provides pertinent information to the end-user. This tab will be updated periodically as features change.





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 Horse 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.

EH EquiHealth

EH Welcome Options Synchronization Support Terms of Use

Selections Mappings Provider: Equine Medical Center

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.

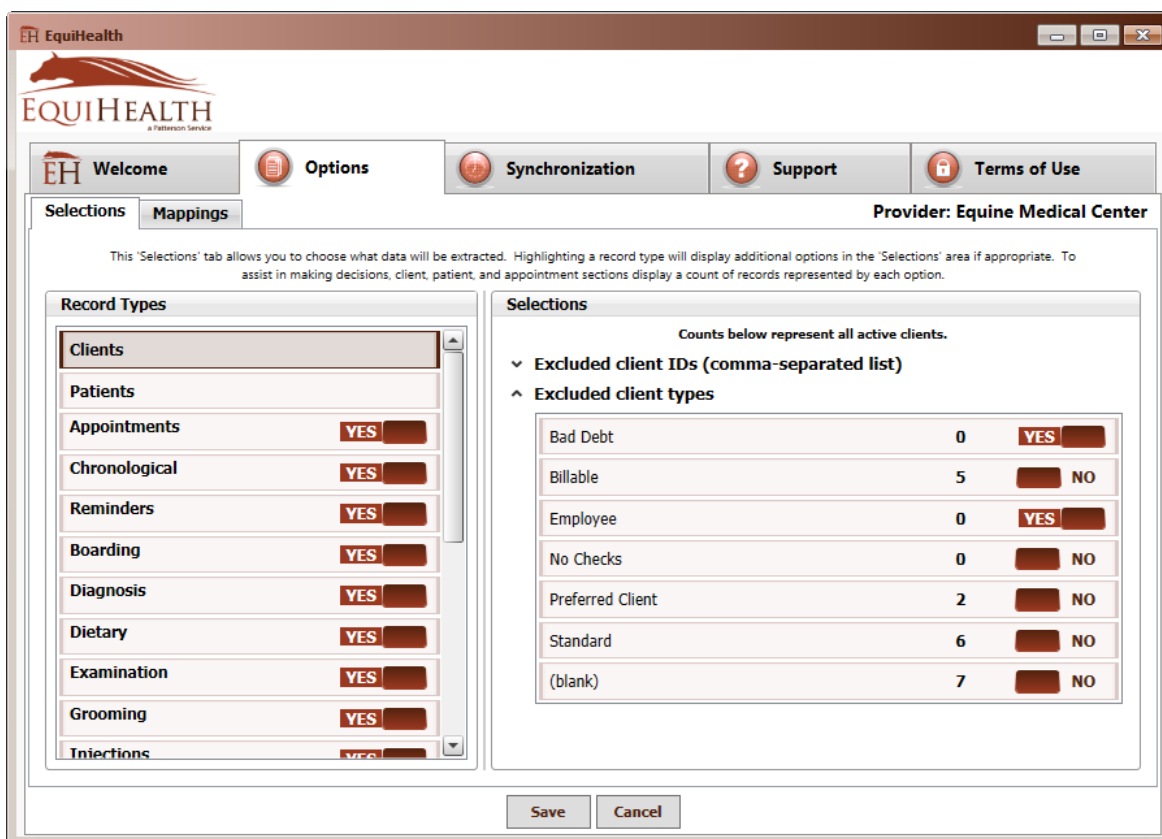
Record Types	Selections																																				
Clients	Display comments in portal YES																																				
Patients	Included Categories (categories selected in other record types not displayed):																																				
Appointments YES	<table border="1"><thead><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>ZADSV</td><td>Administrative services</td><td>Service</td></tr><tr><td>FIN</td><td>Final arrangements</td><td>Service</td></tr><tr><td>EXM</td><td>Exams</td><td>Service</td></tr><tr><td>BANSUP</td><td>Bandage Supplies</td><td>Non-Inventory</td></tr><tr><td>HOSPSUP</td><td>Hospital Supplies</td><td>Non-Inventory</td></tr><tr><td>TXSUP</td><td>Treatment Supplies</td><td>Non-Inventory</td></tr><tr><td>GOTHER</td><td>Miscellaneous Group</td><td>Item Group</td></tr><tr><td>GAX</td><td>Anesthetic Group</td><td>Item Group</td></tr><tr><td>PSVC</td><td>Professional Services</td><td>Service</td></tr><tr><td>TASK</td><td>Tasks for non invoice items</td><td>Service</td></tr></tbody></table>	Category Code	Category Description	Category Type	SUPP	Medical supplies	Inventory	ZADSV	Administrative services	Service	FIN	Final arrangements	Service	EXM	Exams	Service	BANSUP	Bandage Supplies	Non-Inventory	HOSPSUP	Hospital Supplies	Non-Inventory	TXSUP	Treatment Supplies	Non-Inventory	GOTHER	Miscellaneous Group	Item Group	GAX	Anesthetic Group	Item Group	PSVC	Professional Services	Service	TASK	Tasks for non invoice items	Service
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Boarding YES																																					
Diagnosis YES																																					
Dietary YES																																					
Examination YES																																					
Grooming YES																																					
Injections YES																																					

Save Cancel



Client Selections

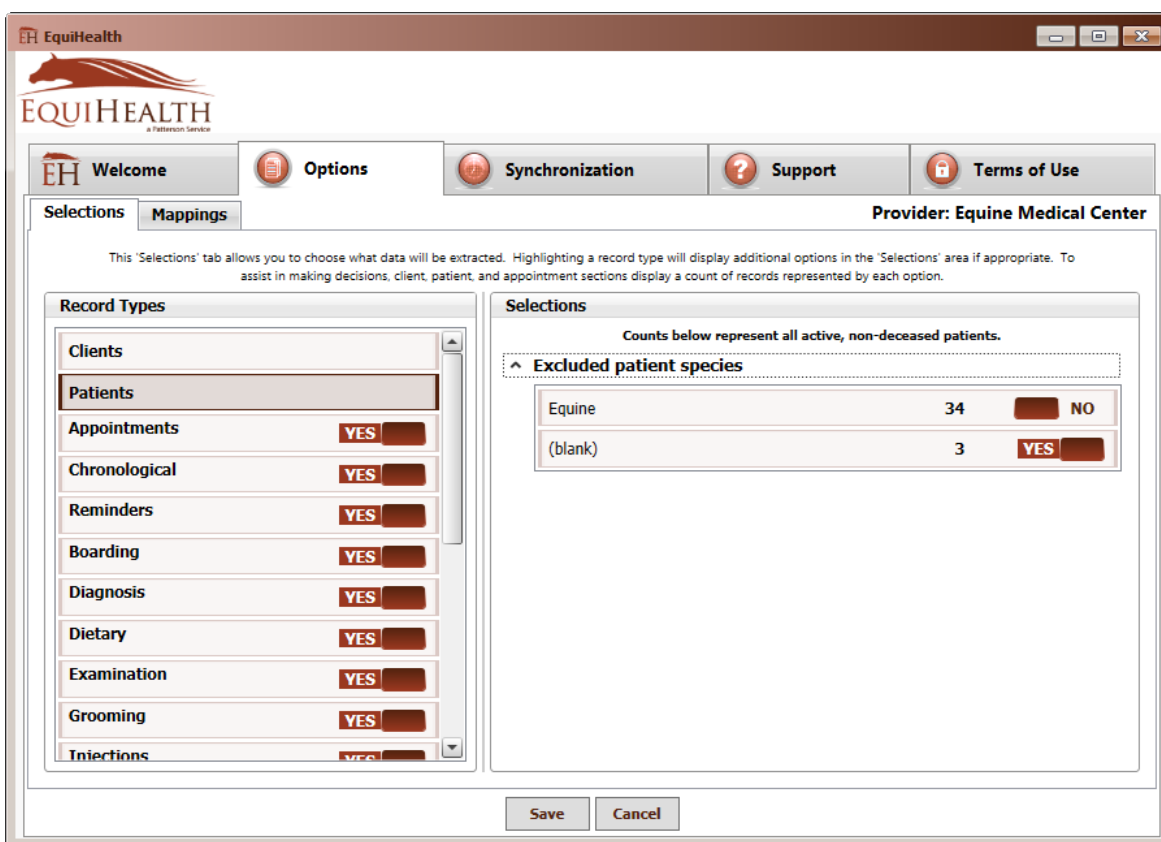
- Classification codes / Client types can be included or excluded on a per site basis, by first expanding each Selection area then toggling the 'yes/no' indicator to exclude (yes) or include (no).
- Clients may be excluded by entering a specific client ID or selecting from the listed client types.
 - 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 EquiHealth 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 EquiHealth Client Portal.
- By default, only the Equine species is included ('no' to include) when the EquiHealth Dashboard in a new installation. At this time, the EquiHealth Portal will only display patients with the Equine species, regardless of selections made in this section of the Dashboard.





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

All appointments are included by default. AVImark does not support appointment reasons.

Note: Older versions of AVImark will not have the option to select an appointment type.

- All appointments with excluded criteria will not be included in the synchronization and will not be viewable in the EquiHealth 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, 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 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 will be displayed on the portal.
- If the Appointment Selection is set to No, confirmation emails for appointments will not be sent to Horse Owners. A notification alert such as the one shown below will appear.



EQUIHEALTH
a Patterson Service

Welcome Options Synchronization Support Terms of Use

Selections Mappings **Provider: Equine Medical Center**

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	
Patients	
Appointments YES	Counts below represent all appointments dated today or later.
Chronological YES	Excluded appointment providers/resources
Reminders YES	Excluded appointment types
Boarding YES	Farm Call 1 YES
Diagnosis YES	Farrier 0 NO
Dietary YES	Lameness Exam 0 NO
Examination YES	Nuclear Scintigraphy 0 NO
Grooming YES	Physical Exam 0 NO
Injections YES	Pre-Purchase Exam 0 NO
	Recheck 0 NO
	Surgery 0 NO

Save Cancel

EQUIHEALTH
a Patterson Service

Welcome Options Synchronization Support Terms of Use

Selections Mappings **Provider: Equine Medical Center**

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	Selections
Clients	
Patients	
Appointments NO	 Setting this selection to NO will stop all Appointment Confirmations
Chronological YES	
Reminders YES	
Boarding YES	
Diagnosis YES	
Dietary YES	
Examination YES	
Grooming YES	
Injections YES	

Save Cancel



Appointment Confirmations

Automated appointment confirmation write back is supported for AVImark in EquiHealth, 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 AVImark.

The screenshot shows the EquiHealth application window. At the top, there is a navigation bar with tabs for 'Welcome', 'Options', 'Synchronization', 'Support', and 'Terms of Use'. Below this, there are sub-tabs for 'Contact Us' and 'Diagnostics'. The main content area displays service status information:

- Service status: **Running**
- Extraction status: **Idle**
- Last extraction: **12/9/2014 3:00:45 PM**
- Last result: **Success**
- Version: **2.1.0.0**

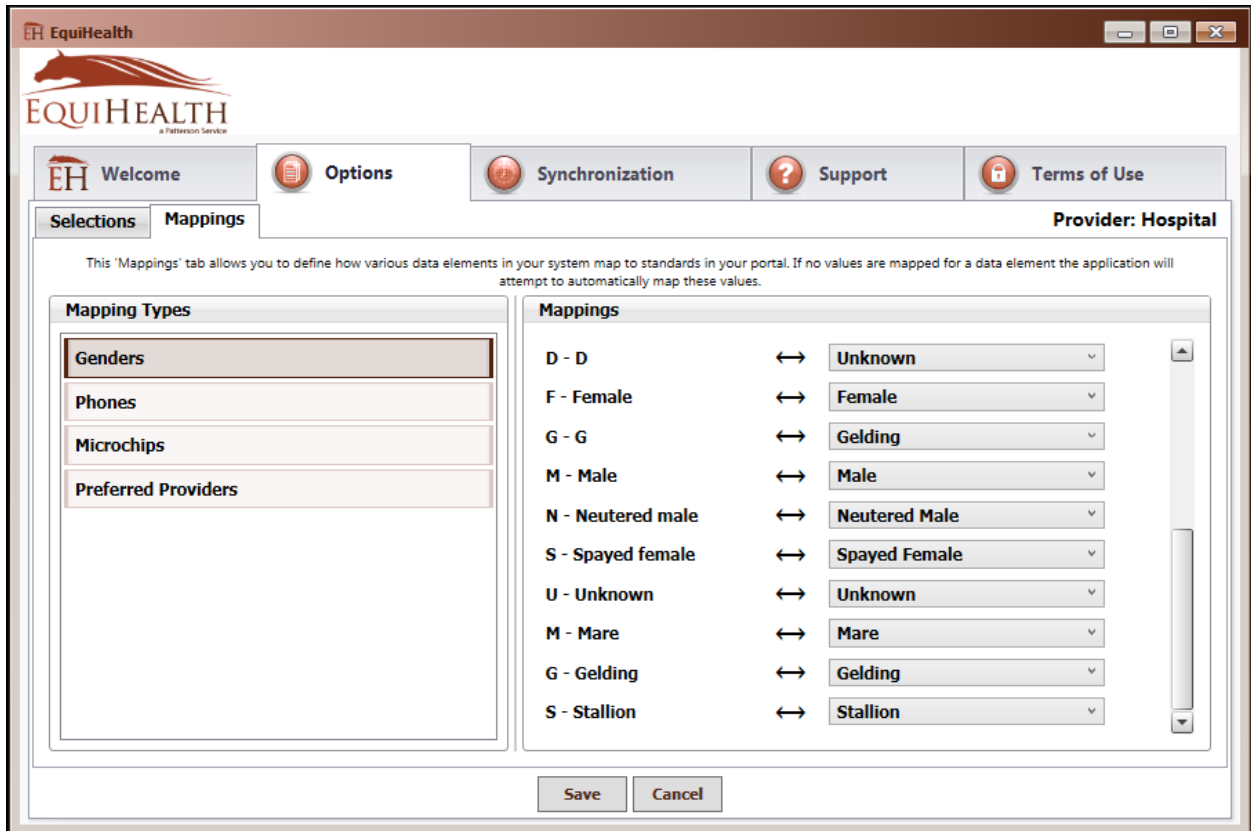
Below the status information is the 'Application Logging' section. It includes an 'AutoRefresh' button set to 'YES' and a 'Get More Entries' button. A table of log entries is displayed below:

ID #	Severity	Timestamp	Message
1767	Information	9/30/2014 11:20:43 AM	Gathering sites initiated.
1766	Information	9/30/2014 11:20:43 AM	Resolving relative path 'Unity.config' to 'C:\Program Files (x86)\ePetHealth\Unity.config'...
1765	Information	9/30/2014 11:20:17 AM	Successfully confirmed appointment for ID: 35085
1764	Information	9/30/2014 11:20:16 AM	Attempting to update Appointment, ID: 35085 for ClientID: 8365, PatientID: 21062
1762	Information	9/30/2014 11:20:08 AM	Resolving relative path 'Unity.config' to 'C:\Program Files (x86)\ePetHealth\Unity.config'...
1761	Information	9/30/2014 11:20:04 AM	Appointment confirmation available for ID: 35085
1763	Information	9/30/2014 11:20:00 AM	Resolving relative path 'Unity.config' to 'C:\Program Files (x86)\ePetHealth\Unity.config'...
1760	Information	9/30/2014 11:10:23 AM	Gathering Providers/Resources initiated.
1759	Information	9/30/2014 11:10:22 AM	Gathering Client Search Codes initiated.
1758	Information	9/30/2014 11:10:21 AM	Gathering Client Classifications initiated.
1757	Information	9/30/2014 11:10:19 AM	Gathering sites initiated.



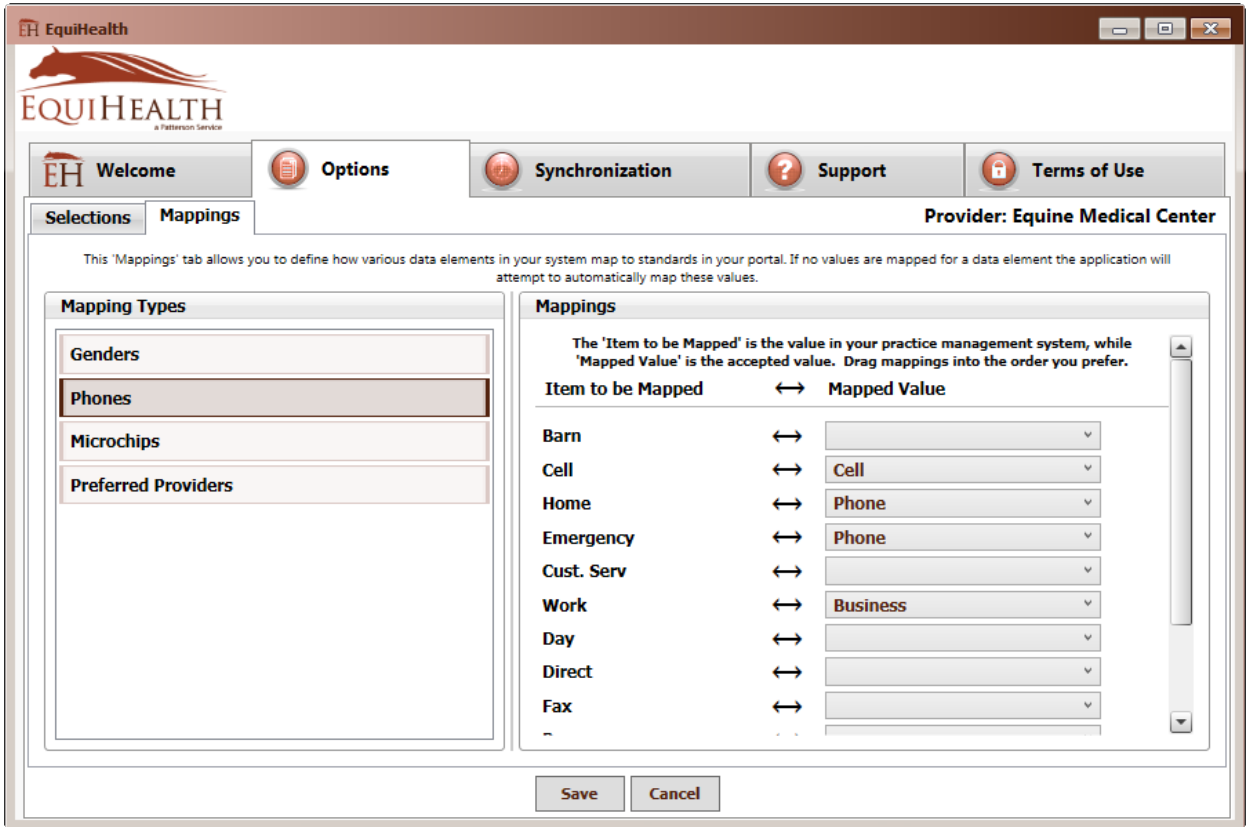
Mappings

- Mappings allow the dashboard to map fields from the Practice Management System to the EquiHealth '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).



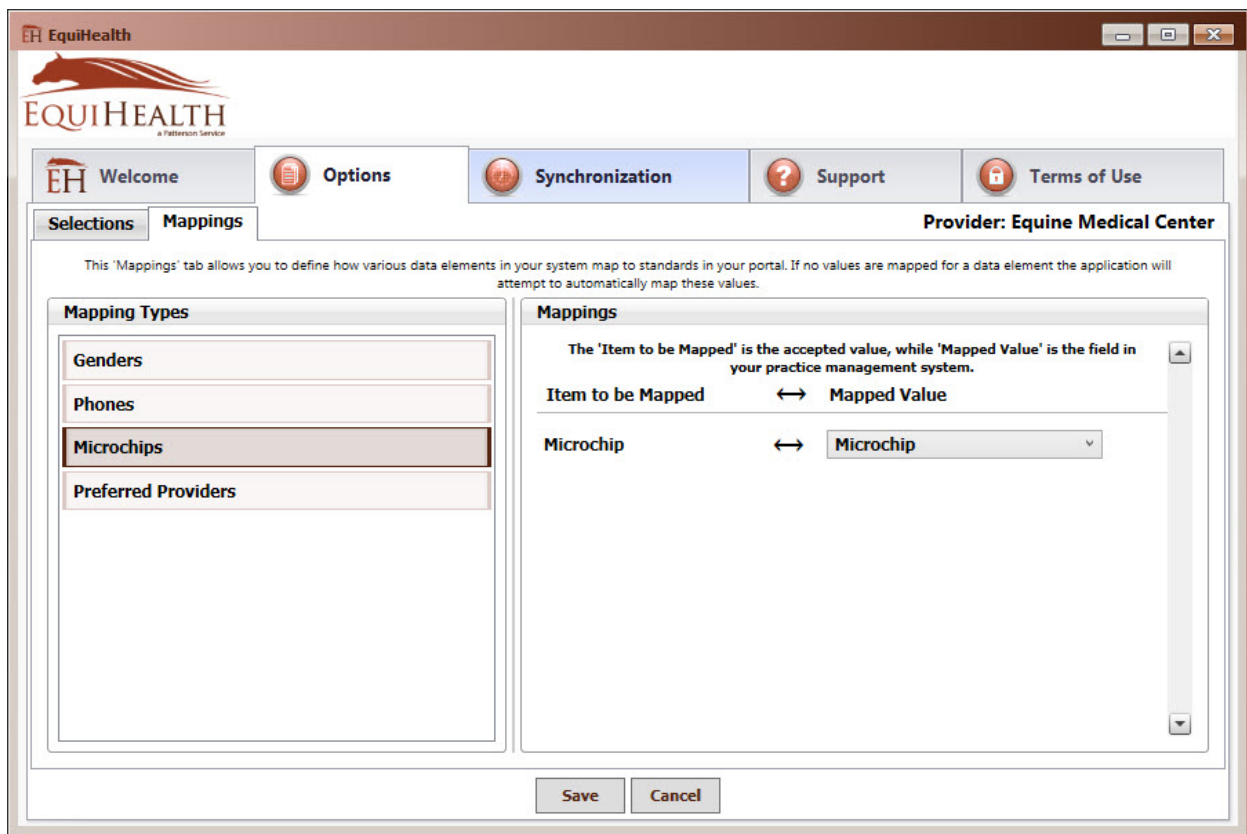


- Phones:
 - The 'Item to be Mapped' is the value in the Practice Management System.
 - The 'Mapped Value' is the accepted value.
 - Multiple phones can be mapped to the same Mapped Value, but only the first phone displayed in the list will be shown for that particular client. For example, Phone and 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).



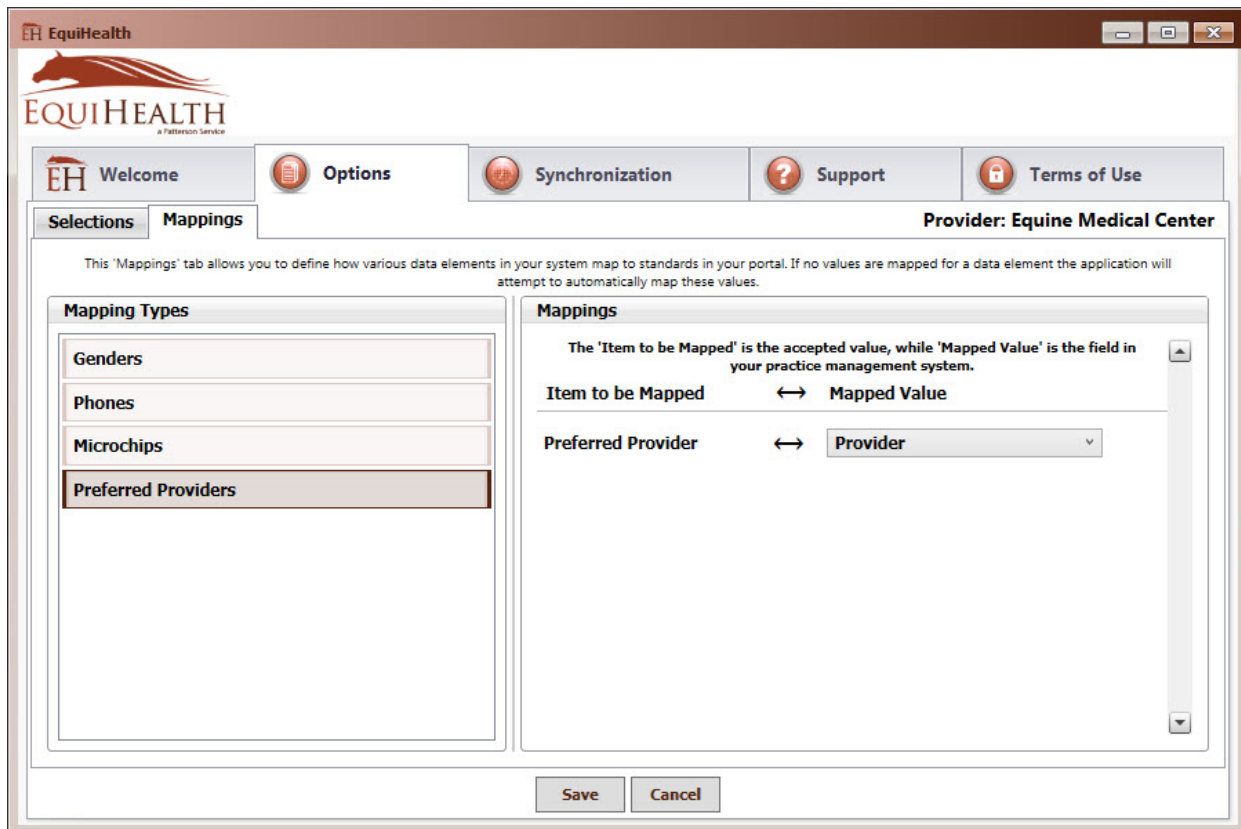


- Microchips:
 - The 'Item to be Mapped' is the accepted value.
 - The 'Mapped Value' is the value in the Practice Management System.
 - Mapped Values can be left blank if the corresponding Item to be Mapped is not to be shown in the Client Portal.
 - For example, the practice would need to designate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





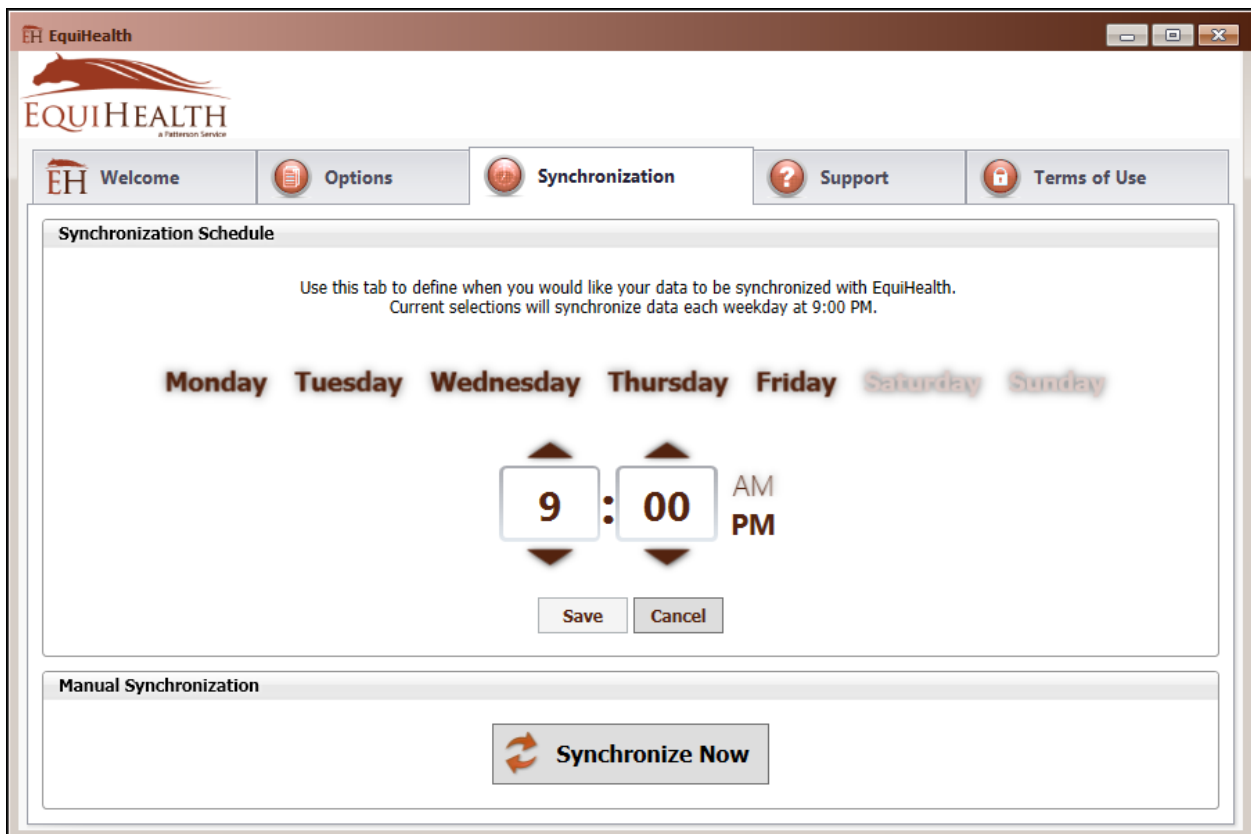
Synchronization

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 EquiHealth. If the dashboard is installed on a workstation, both the workstation and the server computer must remain on.

EquiHealth 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

A screenshot of the EQUIHEALTH software interface. The window title is "EH EquiHealth". The top left corner features the EQUIHEALTH logo and the text "a Patterson Service". Below the logo is a navigation bar with five buttons: "Welcome", "Options", "Synchronization", "Support", and "Terms of Use". The "Support" button is highlighted. Below the navigation bar, there are two tabs: "Contact Us" and "Diagnostics". The "Contact Us" tab is active, displaying the following text: "Please contact us with any questions or technical issues", "888-826-0935", "M-Thu 7AM-7PM CST, Fri 7AM - 6PM", "Sales -- sales@equihealth.com", and "Customer Service -- customerservice@equihealth.com". Below this text is the "Remote Assistance:" section with the "webex" logo. On the right side of the "Contact Us" tab, there is a close-up photograph of a horse's eye.



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 EquiHealth 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:

- Toggles whether new logs appear automatically

Get More Entries:

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

The screenshot shows the EquiHealth dashboard interface. At the top, there is a navigation bar with tabs 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: **12/9/2014 3:00:45 PM**
- Last result: **Success**
- Version: **2.1.0.0**

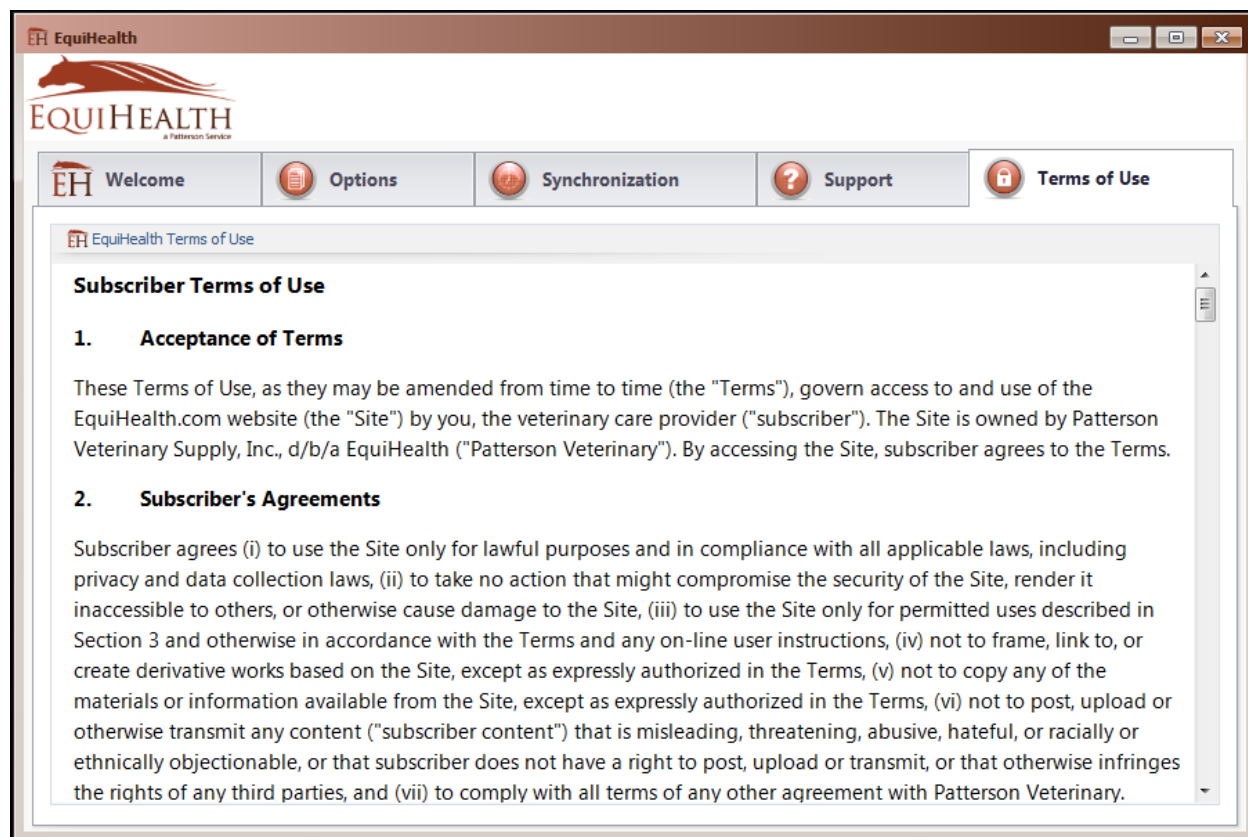
Below this information is the Application Logging section, which includes an AutoRefresh toggle set to YES and a Get More Entries button. The logging table contains the following entries:

ID #	Severity	Timestamp	Message
5048	Information	12/16/2014 1:48:42 PM	Gathering Providers/Resources initiated.
5047	Information	12/16/2014 1:48:42 PM	Gathering Client Search Codes initiated.
5046	Information	12/16/2014 1:48:41 PM	Gathering Client Classifications initiated.
5045	Information	12/16/2014 1:48:41 PM	Resolving relative path 'Unity.config' to 'C:\Program Files (x86)\EquiHealth\Unity.config'...
5044	Information	12/16/2014 1:48:40 PM	ConfigSettings: Setting InitialSetup Removed. Old value:
5043	Information	12/16/2014 1:48:40 PM	Gathering sites initiated.
5042	Information	12/16/2014 1:48:40 PM	Resolving relative path 'Unity.config' to 'C:\Program Files (x86)\EquiHealth\Unity.config'...
5041	Information	12/16/2014 1:48:40 PM	ConfigSettings: Setting DisableCounts Changed. Old value: 1, New value: 0
5040	Information	12/16/2014 1:47:17 PM	Gathering Providers/Resources initiated.
5039	Information	12/16/2014 1:47:16 PM	Gathering Client Search Codes initiated.
5038	Information	12/16/2014 1:47:16 PM	Gathering Client Classifications initiated.
5037	Information	12/16/2014 1:47:15 PM	Gathering sites initiated.
5036	Information	12/16/2014 1:47:14 PM	Resolving relative path 'Unity.config' to 'C:\Program Files (x86)\EquiHealth\Unity.config'...



Terms of Use

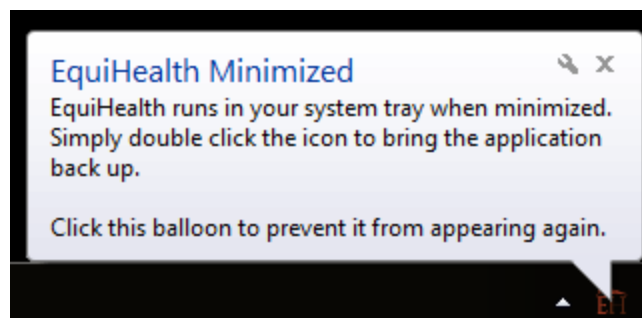
The Terms of Use tab displays the most current policies from EquiHealth.



Program Closing/Minimizing:

The EquiHealth 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 Filter Data

Class Codes / Client Types

Client Information Display - Dr. Kim

Clients Work with Applications Utilities Help

CLIENT: William Smith

Name	First William	Title	Added 11/13/03
Address Navigation Dr.	Phone 719	Codes A	E-mail
City Colorado Springs	Work	Class 01	Fax no.
State CO	Zip Code	Balance 0.00	County 000
Referral	Spouse	Cell 719	Folder 285
			Co. 01

Change Client

Contact Information Balance 0.00

Last	First William	Title
Address Navigation Dr.	Zip	
City Colorado Springs	State CO	Phone 719
County	Work	Faxno
	E-mail	Cell
	History Zip (none)	(none)

Personal Information

SSN ????????????	License	Photo 8
Employer	Spouse	
Preferred Doctor KK: Dr. Kim	Reference	

Added 11-13-03 Added By Codes A Suspend Reminders

Folder 285 Co. 1 Contract Price Suspend Until

Class Clients Statement Site Quality 0 Set

Next Prior OK Cancel



Appointment Filtering

AVI New Appointment

Treatments Opening

Date: 01/22/13 Time: 12:15p Created: 01-22-13 Tx, Items, Dx & Problems

Doctor: DRC: Doctor Candidate by LG

Room: Exam Room 1 Minutes: 15

Client: Smith, Phone: 503 -

Patient: Chloe Species: Canine

Breed: Shetland Sheepdog Weight: 32.70 lbs Type: (none)

Notes...

Reminders...

- 02-11-05 Annual Deworming
- 10-22-05 Heartworm Blood Test
- 12-17-04 Fecal Parasite Screen
- 04-16-15 Rabies 3 yr Vaccine
- 10-29-15 Distemper/Parvo 3 yr Vaccine

Unconfirmed Confirmed Left message

New Client New Patient Next Patient Done Remove Quit Help