



# **eVetPractice<sup>®</sup>**

## **Telemedicine**

# Table of contents

- Introduction ..... 3
- Create a Virtual Visit ..... 3
- Email the Virtual Visit Link..... 4
- Default Telemedicine Email ..... 5
- Before the Virtual Visit..... 7
- SMS Reminder..... 7
- The Virtual Visit..... 9
  - Launch from Appointment..... 9
  - Launch from Medical Records ..... 9
  - Start the Meeting ..... 10
  - Conclude a Meeting ..... 11
- Accepting Payments ..... 11
- Troubleshooting..... 12
  - Using Zoom..... 12
  - Record the Meeting ..... 12
  - The Waiting Room..... 12

## Introduction

eVetPractice has integrated the use of telecommunications in order to provide patient health care at a distance. Telemedicine helps work around distancing and can improve access to veterinary services that may not be available to clients unable to leave their home. Telemedicine can also be used to save patients in critical care and emergency situations or for quick follow-up visits. The client calls the veterinary business and, with telemedicine, may be able to get medical advice or a prescription from the veterinarian.

## Create a Virtual Visit

To get started with telemedicine, create an appointment for the client/patient and check the option "Virtual Visit".

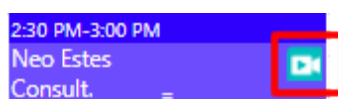
1. In eVetPractice, go to **Appointments**.
2. Create a new appointment.
3. Enter the information for the appointment,
4. At the bottom of the Add Visit screen, check the box labeled **Virtual Visit**.

The screenshot shows the 'Add Visit' form in eVetPractice. The form has a title bar 'Add Visit' and a message: 'The appointment's time and duration may change due to the change in the appointment type.' The form fields are as follows:

- Type \*: Consult.
- Resource: Dr. Brady
- Description: Neo has been scratching a lot in the last couple of days.
- Copy description to medical record's reason for visit? (checkbox)
- Patient: Neo (Feline 15 LBS) - Benny Estes
- TIP: Search for patient by customer: FirstName+LastName+PatientName. Ex : John+Doe+Daisy
- Click to quickly create client and patient
- Primary Provider: - None -
- Status: - None -
- Confirm Status: - None -
- Is Complete: (checkbox)
- Appointment Start \*: 4/9/2020 12:00 PM
- Appointment End \*: 4/9/2020 12:30 PM
- Repeat: (checkbox)
- All Day: (checkbox)
- Virtual Visit: (checkbox) [checked and highlighted with a red box]

5. Click **Save**.

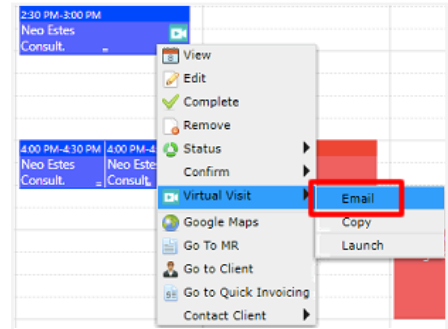
Appointments setup as a virtual visit will have a video icon in the lower right corner of the appointment.



## Email the Virtual Visit Link

The next step, after creating the appointment, is to email the appointment link to the client. The client will click on the link in the email to join the meeting.

1. In Appointments, click or right-click on the virtual visit appointment to bring up the shortcut menu.
2. From the Virtual Visit sub-menu, click on **Email**.
3. The email screen will open, populating the fields with the client's email address and patient name.
4. A default message will be automatically generated which will include the link for the client to click on and the password to enter the virtual visit at the appointed time. The message can be modified, if necessary.



Patient email is regarding: Fiona

Email Template: -- Select --

To \*: grolsum@email.co

NOTE: Separate multiple emails by semi-colon (;).

Subject \*: Fiona Folsum's virtual visit has been scheduled!

Edit | Insert | View | Format | Table | Tools

Paragraph | Verdana | 10pt

Hello %clienttitle% %clientlastname%,

Thank you for scheduling your virtual visit. We look forward to seeing Fiona Grosskopf on 4/13/2020 at 1:00 PM.

Please click [click here](#) at your scheduled appointment time and enter password **24061** to start your session.

If you have any questions or need to reschedule, please contact us at %practicephone%. We look forward to seeing you!

%practicename%

5. Click **Send**.

## Default Telemedicine Email

A default email template is provided for you. However, the email can be customized to suit your business needs.

From the email template section, set an email template as virtual visit by selecting “Is Virtual Visit Template”. When this option is selected for a new email template, an example email content is generated with virtual visit merge fields. You can update the content or enter your own.

Create Email Template - [Back to List](#)

**General Information**

Name \* Virtual Visit Email

Description Virtual Visit Email

Is Virtual Visit Template \* ☒

Subject \* Virtual visit for %patientname%

Edit Insert View Format Table Tools

Hello %clientfirstname% %clientlastname%,

Thank you for scheduling your virtual visit. We look forward to seeing %patientname% on %virtualvisitappt%.

Please click the link below to access the virtual meeting:

%virtualvisiturl%

If you are dialing in from your phone, you maybe asked to enter password %virtualvisitpassword%

If you are new to Zoom, you may be asked to download the Zoom application onto your phone or tablet which you will need to do to join the meeting. Don't worry - it's free!

If you have any questions or need to reschedule, please contact us at %practicephone%. We look forward to seeing you!

%practicename%

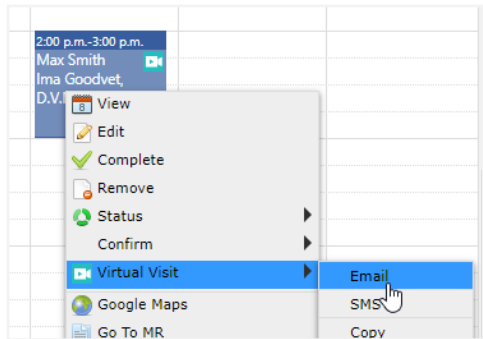
There are new merge fields available for a virtual visit email template:

**%virtualvisitappt%** - virtual visit date and time

**%virtualvisiturl%** - virtual visit participant link

**%virtualvisitpassword%** - virtual visit password

Once a virtual visit email template is created, it is available for selection from the virtual visit email.



Email John Smith - [Back to Client](#)

Email John Smith - m.closen@fusion92.com

Patient email is regarding Max

Email Template Virtual Visit Email

To \* -- Select --

Subject \* Virtual Visit Email (✓)

Virtual visit for %patientname%

Edit Insert View Format Table Tools

Paragraph Arial 10pt

Hello %clientfirstname% %clientlastname%.

Thank you for scheduling your virtual visit. We look forward to seeing %patientname% on %virtualvisitappt%.

Please click the link below to access the virtual meeting:  
%virtualvisiturl%

If you are dialing in from your phone, you maybe asked to enter password %virtualvisitpassword%

If you are new to Zoom, you may be asked to download the Zoom application onto your phone or tablet which you will need to do to join the meeting. Don't worry - it's free!

If you have any questions or need to reschedule, please contact us at %practicephone%. We look forward to seeing you!

%practicename%

99 WORDS

Merge Data with Text Send Attachment



To create an appointment type for virtual visits and exclude the appointment type from automatic forms of communication, select your custom email. In addition, having a virtual visit appointment type is useful for reporting purposes.

## Before the Virtual Visit

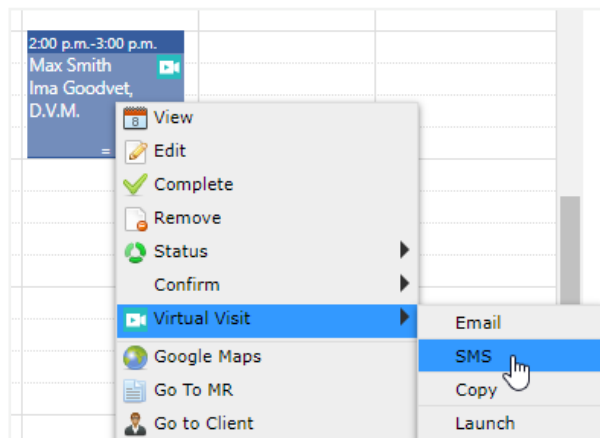
If the virtual visit entails consulting about a patient's wound, skin issue, or limping, it is recommended the clinic request the client send images or video of the affected area on the patient before the meeting. This will give the medical personnel time to review the images or video before the virtual visit and be better prepared to treat the patient at the time of the visit.



The client can upload photos via the portal so they may be reviewed during the virtual visit.

## SMS Reminder

To send a SMS reminder for a virtual visit appointment, locate the appointment from your practice calendar and right/left click, select **Virtual Visit | SMS**.



The SMS window will open. You can select the existing client's phone number or add a new number. Select **Send** to send SMS.

Send SMS Message

Number(s) to send message to:

(254) 658-5858

(584) 987-5852

Templates:

Add New Phone

SMS Message:

%patientname% has a virtual visit on  
%virtualvisitappt%. Appt Link:  
%virtualvisitlink%

Merge Data with Text

Patient:

Max

\*\*\* If you do not see the client's phone number, please add first then choose. \*\*\*

Send

Cancel



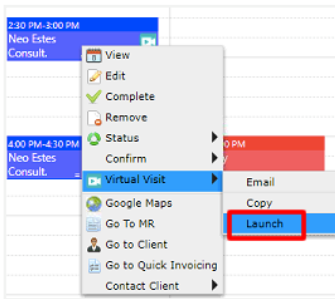
## The Virtual Visit

At the time of the meeting, the veterinary staff member assigned to the meeting will start the meeting then admit the client to the enter the meeting. The client, in the meantime, clicks the link provided in the email and enters the password, if requested, which is also provided in the email. The client enters the virtual “waiting room” until the veterinary staff allows them to enter the meeting room.

Meetings can be started from the shortcut menu off the appointment or from inside the patient's medical record.

### Launch from Appointment

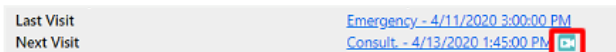
1. Go to **Appointments**.
2. Right-click on the virtual visit appointment.
3. Click on **Launch**.



4. Follow the screen prompts from Zoom to start the meeting.

### Launch from Medical Records

1. Open the patient's medical record.
2. Click on the camera icon to launch the meeting.



3. Follow the screen prompts from Zoom to start the meeting.

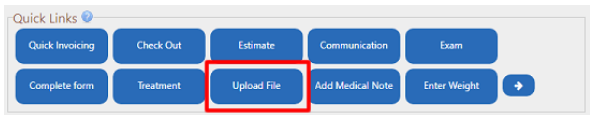
## Start the Meeting

When the veterinary staff member starts the meeting, Zoom provides the option to use the computer's speaker or use the phone to call in for audio. To host the video session, you will need to download the Zoom plug-in to your computer, or download the app to your mobile device. The client does not need to download anything to join the meeting.

The option to admit a client to the meeting will be displayed or the staff member may go to the virtual waiting room. Clients scheduled for virtual visits, and have followed the link to attend a meeting, will show in the waiting room. Staff clicks on the client name then clicks **Admit**.

Virtual visits can be recorded and saved in the patient's medical record. Zoom provides an excellent video and step-by-step instructions for recording the meetings. Refer to "Record the Meeting" on page 12.

From the patient's medical record, click on the link to **Upload Files**.



As the screen shows, add files by "dropping" them in the form or click to browse and navigate to where the recording is located.

A screenshot of the 'Upload Documents' form. At the top, it says 'Upload Documents - Back to Medical Record'. Below this is a 'Document Information' section with fields for 'Document Type' (set to 'General'), 'Name \*' (with a yellow highlight), 'Use file name as document name?' (checkbox), 'Date' (4/13/2020, 2, 41, PM), 'Description', 'Keywords', and 'Is Public?' (checkbox). A 'Save' button is below the form. At the bottom of the form area, it says 'Drop files here to upload OR click to browse for a file(s)'.

## Conclude a Meeting

To end a virtual visit, simply close the Zoom screen. You may receive a confirmation to end or leave the meeting. There is also a button users may click on to end a meeting. On the client side, a client can click a button to leave a meeting or simply close the windows.

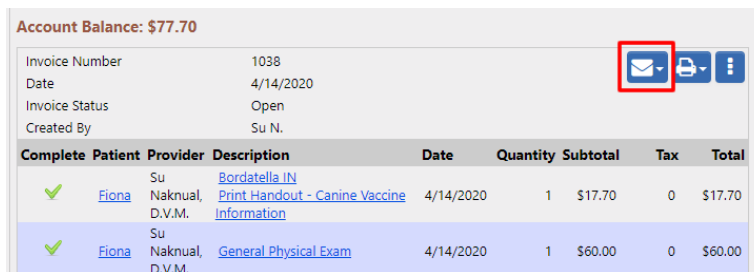
## Accepting Payments

Some clinics prefer accepting payments at the time the virtual visit is booked. Regardless if the payment is accepted before the visit or after, there are different ways to receive payment from clients for a virtual visit.




One option to receive payments for virtual visits would be to direct the client to the portal immediately after creating the appointment. The client can review the initial consult invoice and pay if the clinic integrates with **WorldPay**.

Another payment option would be to email the invoice to the client.

1. From the Checkout screen, click on the email button and choose **Email Invoice**.



Account Balance: \$77.70

Invoice Number	1038	  
Date	4/14/2020	
Invoice Status	Open	
Created By	Su N.	

Complete	Patient	Provider	Description	Date	Quantity	Subtotal	Tax	Total
✓	Fiona	Su Naknual, D.V.M.	<a href="#">Bordetella IN</a> <a href="#">Print Handout - Canine Vaccine Information</a>	4/14/2020	1	\$17.70	0	\$17.70
✓	Fiona	Su Naknual, D.V.M.	<a href="#">General Physical Exam</a>	4/14/2020	1	\$60.00	0	\$60.00

2. On the email screen, select the invoice template.
3. Verify the client's email address is correct and the message content is correct.
4. Click **Send**.

## Troubleshooting

### Using Zoom

eVetPractice uses Zoom (Zoom Video Communications, Inc.) for the virtual visits. For more information about Zoom and how to use this feature, visit Zoom's [Support](#) site.

### Record the Meeting

For more information about recording a meeting, refer to Zoom's [Local Recording](#) page for step-by-step instructions.

### The Waiting Room

When a client clicks on the link for the virtual visit, the host (clinic staff assigned to the visit) is able to control attendance in the meeting. The host also has the ability to put the client back in the waiting room. This will come in handy, for example, when the doctor leaves the meeting and turns the meeting over to another team member.

For more information, refer to Zoom's [Waiting Room](#) page.