

Virtual Visits

Overview

Client remote visits can be conducted using a video call between your staff and your clients. These virtual visits can be created in VisionVPM through an appointment or a clinical record and the link to the video conference via email and/or txt to the client. At the appointed time staff and clients click their respective links to connect via a video call and hold a remote, virtual visit.

This functionality allows you to stay connected with clients when clients are unable to come into your clinic. It can also provide personal contact when doing kerbside workflows by allowing your clients to see a video while their pet is in the clinic building for example, during a contactless consult, recovering from surgery, or while boarding.

Virtual visit functionality is free of charge until 1st August 2020, after which time charges will apply.

Pre-Requisites

- 1. VisionVPM version 2020.14 or above.
- 2. .net Appointment Book version 2020.4.24 or above.
- 3. Clinic staff running teleconference meetings will need to download the Zoom app as the web browser based options requires authentication details which are handled in the background.

Setup

Virtual Visit Activation

The VisionVPM Implementation team will schedule a time to set up and walk you through the functionality.

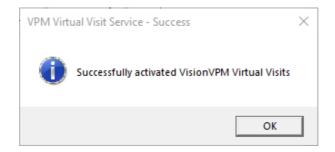
Virtual Visits needs to be activated in VisionVPM and our interface before it can be used.

- 1. Go to Maintenance > System Defaults > Clinical Records Settings.
- 2. When advised by our team member, enable Activate Virtual Visit.

	Analysis Estadory Solup
Clinical Record Settings	VPM Virtual Visit Service
OFF Use the appointment date/time on the clinical record	VisionVPM Virtual Visit Setup
ONO Show drug and reminder list on the clinical record main tab	Device Code:
Use the clinical drugs tab	
ON Default dental scores as -1 (ie not assessed) ON Add repeats left and script expiry to script drug label	
OFF Export an xml file to the LabExport folder when printing a lab lab	Provide this code to the support member
Update clinical record with appt notes O Never Automatically Clinical record font Calibri Int Label Label	Waiting on support to process activation
Lock records after 0 days	
On creating a Virtual Visit send notification by None Txt Email Txt and Email Will be tried if the	

- 3. Give the team member the **Device Code** and they will activate Virtual Visits in our interface.
- 4. When successful, you will receive this message in VisionVPM:



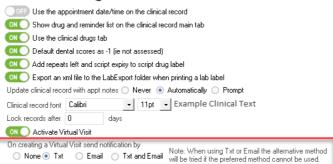


Virtual Visit Notification

A default txt message and email template need to be set up which includes the virtual visit link for the client.

- 1. In **Maintenance > System Defaults > Clinical Record** select the communication type to send the virtual visit meeting details to the client.
 - a. Txt is enabled by default.
 - i. If the client does not have a mobile number, then the email window will open by default so an email can be sent to the client.
 - b. When **Email** is selected and the client does not have an email address, the Txt window will open so a txt can be sent.
- 2. Select Txt and Email to send both a txt and an email to the client regarding their virtual visit.

Clinical Record Settings



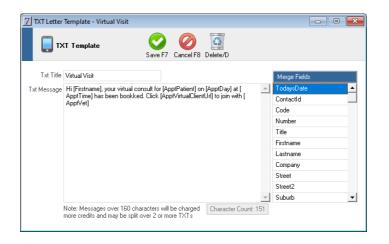
Default Templates

Go to Maintenance > Lookup Lists > General Lists > Default Template.
 a. Create a txt template with a Type of Txt – Virtual Visit.

7 Default Template	is - 2	
	Save F7 Cancel F8 Delete/D	
Type Template Clínic	Txt - Virtual Visit Virtual Visit	•

b. This can include merge fields for the appointment day/time and online meeting link





c. Where you want to send an email, create an email template with a **Type** of **Email – Virtual Visit**.

7 Default Template	is - 9		- • •
	Save F7 Cancel F8 Delete/D		
Туре	Email - Virtual Visit	•	
Template	Virtual Visit	-	
Clinic		-	

d. As per the txt template, use required merge fields for appointment date/time and virtual visit link.

🔤 Mail Merge:Virtual Visit		-		Х
(a) Options				
Options To Lupport.covertus@visionvpm.com Subject Virtual Vist Body HTML Preview Arial	Mobie JoinDate EmailAddress ClientCustom 1 ClientCustom 1 ClientCustom 3 ClientCustom 4 ChargingDistance WrittenOff CurrentDue OneMonth ThreeMonth ThreeMonth ThreeMonth ThreeMonth EalanceDue ApptDay AppTime ApptPatient ApptVet ApptNotes	∲ Add Atta ge Fields	chments	
€ VPMMail	ApptVirtualClientUrl ApptVirtualPassword ApptVirtualVetUrl AnimalName AnimalDesc S	Send	Close	v



Workflow

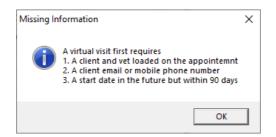
Create scheduled online meeting

A virtual visit meeting can be made from the Appointment book, Appointment Details window or from a Clinical Record according to clinic workflow.

To be able to create a virtual visit requires the following conditions:

- A client and vet must be loaded on the appointment or clinical record
- A client must have a mobile phone number or an email address
- The start date of the virtual meeting must be within 90 days in the future.

When any of the above conditions are not met, VisionVPM will display the following message:



Create the virtual visit link

- From the Appointment Book window, right-click an existing appointment and click Create Virtual Visit.
- From an Appointment Details window, click the **Online Meeting** check box before saving and closing the appointment.



Sedit Appointm	nent					×	
Appointment De	tails			Client Details			
Client Name:	Adamson, Mr & Mrs J & H Joseph & ×	+ Advanced Set	arch	Adamson, Mr & Mrs J & H Joseph & Harriet Lolly Lane			
Alt. Address:			•	🔂 R D 11 🛛 🍕	2		
Animal Name:	Jerry Domestic Medium Hair, Felin	+		TAURANGA 3000			
Type:	Consultation SA	Walk in		test@test.com 'J' canine microchi	in number 092 000	106102000	
Reason:			•	📒 \nBreed: Golden Rel	t DOB 21/11/08 (Colour:	
Status Group:	Clinic Mobile			golden Sex: Male\r	113/02/09 - weight	10.7kgs	
Notes:				Due: \$1,428.61 L	ast Payment: 11/	06/2015	
				J	,	\$1,428.61	
Starts:	Thursday, 23 April 2020	8:15 AM					
Ends:	Thursday, 23 April 2020	8:45 AM		Current 30 Day	s 60 Days	90+ Days	
Clinic:	VPM Super Clinic		•	Animal Details			
Resources:	1Consult 2 x CK x		•	Jerry			
Primary Vet:	Calvin Klein		•	Domestic Medium H Male Neuter	lair (Feline)		
User:	Calvin Klein		•	20y 3m 13d 4 kgs			
Surcharge:			•				
Appt Option	Earlier Appointment Requested		·	No animal reminders			
				Next appointment r	not specified		
TXT Option	Send automated TXT messages						
SMS Messages:							
Confirmed By:	Client Practice Add Confirmation Note						
Created:		04/2020 12:50 PM					
Online Meeting	Create a Virtual Visit when saving approximation of the	pointment					
Recurrence				Save and Add New 🔹	Save and Close	Cancel	

- From a Clinical Record click the **Virtual Visit** tab and enter the date and time of the virtual visit meeting if different from the clinical record date and time.
 - The start date cannot be before the current date and time or more than 90 days in the future.

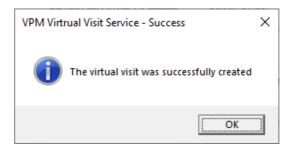
Virtual Visit Date	
Virtual Visit Meeting Start Date / Time	<u>Q</u> k
24 APR 20 16:22	<u>C</u> ancel

• Click **Ok** to run the service to schedule the new virtual visit.

VPM Virtual Visit Service	
Scheduling new virtual visit. Please wait	
	Cancel

 \circ Click **OK** on the window showing the virtual visit has been created.





• When sending a txt, confirm the details in the SMS Txt Message windows then, click Send.

7 TXT Letter	Template - Virtual Visit			×
TX	KT Template			
	Virtual Visit Hi [Firstname], your virtual consult for [ApptPatient] on [ApptDay] at [ApptTime] has been bookked. Click [ApptVirtualClientUrl] to join with [ApptVet]	4	Merge Fields TodaysDate ContactId Code Number Title Firstname Lastname Company Street Street2	
	Note: Messages over 160 characters will be charged Character Cour more credits and may be split over 2 or more TXTs	💌	Suburb	-

 \circ $\;$ When sending an email, confirm the details in the email window, then click Send.

🔤 Mail Merge:Virtual Visit		_		×
🔕 Options				
To liane.doe@somewhere.com Attachments				
From support.covetrus@visionvpm.com				
Subject Virtual Visit				
		🥖 Add Att	tachments	•
Body HTML Preview				
Arial • 2 (10pt) • B I U A 2 🐘 🖬 🗐 📰 🗐 🚍 🚍 🗐 🗄 🛱 🛱	M	erge Fields		
Hi [[Firstname]]				^
	EmailAddress ClientSeq			
Your virtual visit consult for [[ApptPatient]] on [[ApptDay]] at [[ApptTime]] has been booked.	ClientCustom1 ClientCustom2			
Please link here [[ApptVirtualClientUrl]] to join the call with [[ApptVet]].	ClientCustom3 ClientCustom4			
Thanks	ChargingDistance WrittenOff			
	CurrentDue OneMonth			
[[ClinicName]]	TwoMonth ThreeMonth			
	CreditLimit LastActivityDate			
	BalanceDue ApptDay			
	Appt Time Appt Patient			
	ApptVet ApptNotes			
	Appt Type Appt Virtual Client U			
	Appt Virtual Passwo Appt Virtual Vet Url	rd		•
	AnimalName			~
	AnimaiDesc			-
V PMMail		Send	Clos	e



- The email and/or txt will be seen in the Client Communications window.
- An appointment connected to a virtual visit will show the video conference icon on the appointment in the appointment book.



• A virtual visit created from a clinical record, will show the Virtual Visit tab with a red strip on the left-hand side.





Update scheduled virtual visit

When you change the appointment to a different date and/or time, or the primary vet associated with the appointment is changed, the link for the scheduled virtual visit will update and automatically open the SMS Txt Message and/or Email window to send the updated details to the client.

Delete scheduled virtual visit

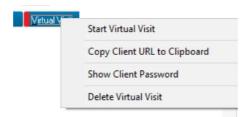
The link to the scheduled virtual visit can be deleted from the Appointment Book window, the appointment or the clinical record by clicking the Virtual Visit option and selecting **Delete Virtual Visit**. This will open a blank SMS Txt Message window from where you can select the required template or manually enter one. The Email window will default to the standard template from where you can modify as required.

Start the virtual visit

- 1. Clinic staff can start the virtual visit from the appointment book, the appointment details window or from the clinical record.
- 2. From the appointment book right-click the required appointment, select Virtual Visit and then click Start Virtual Visit.
- 3. From the appointment details window, click Virtual Visit Options and then then click Start Virtual Visit.
 - a. When you want to send a manual txt/email to the vet or client containing the virtual visit link, click **Copy Visit Vet URL** or **Copy Visit Client URL**. For example, where the computer you are running VisionVPM does not have a webcam and you want to run the virtual visit on a device that does, email/txt the Visit Vet URL which can then be opened on a device with a webcam.



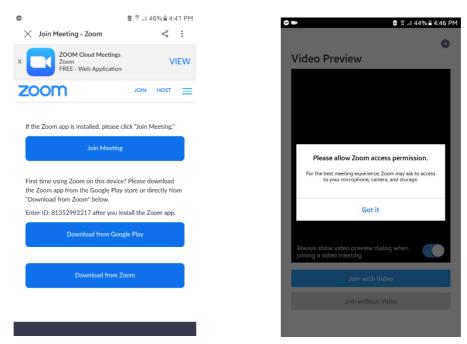
4. From the clinical record window, click Virtual Visit and then click Start Virtual Visit.



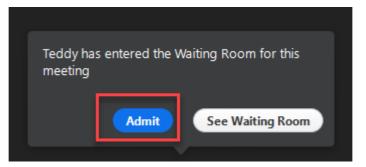
Carry out the virtual visit

- 1. After clicking to start the virtual visit the videoconference application will start.
 - a. Open the Zoom app
 - b. Give permission to use the camera and audio.
- 2. The client will click on their link in their txt or email to join the video conference call.
- 3. They will need to download the Zoom app before the virtual visit and give permission to use the camera and audio.

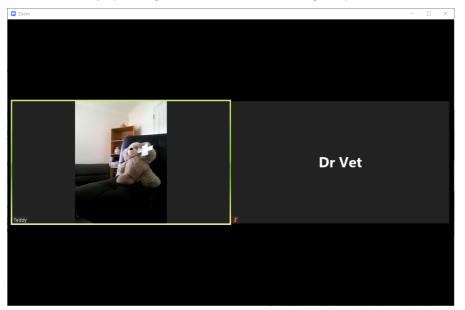




4. The vet will be prompted when the client joins the call so the vet can click Admit.



5. Conduct the virtual visit by speaking with the client and viewing the patient.



6. Click End Meeting to end the call.

🎽 n 💋 n	÷	2	-	<u>^</u>	\bigcirc	e t	End Meeting
Unmute Start Video	Security	Manage Participants	Chat	Share Screen	Record	Reactions	



Clinical Record

Clinical records that have a linked virtual visit can be seen in the Clinical History window by a tick in the **Virtual** column.

Clinica	l hist Fred	ory for	Insert/		arch L	ab Results	• Ar	Radio Contraction (Marchaeler Contraction)	New Doc	@ Email/E	 Reports/P 	Lient/T	nimal/N	Annt 17	Close F9
Date	Vet	Ref		_	_	Virtual			no <u>n</u> Body		Insurance	Notes	- I III GIFT		Screen Repo
24 APR 20 16:22	CK	18194A										CLINICAL	CONSULT.	ATION	
16 AUG 17 16:45		6853A										CLINICAL	CONSULT.	ATION	
3 NOV 16 16:59		3740A										Palpate N	lumbers () Le	esions NAd	lmitted: Clinic

To see a list of all clinical records with attached virtual visits go to the **Clinical Record List** window, and click the **Is a Virtual Visit** check box and then click **Rebuild**.

Clinical F	lecord List	Record/R Anima		Lent/T Print/P Setup Close F9	
Client Name Parker, Ms Trinie Kattlin, Miss Kendra Victory Saint Stud King, Mrs Hayley Shumack, Mr Matt Lintott, Ms V Viv Ernie & Animal Friends	Animal Sooty Fred Labonaire Flash Allie Cuckoo Annabel Tammy	Date It 24 APR 20 17:42 24 APR 20 16:22 23 APR 20 16:04 22 APR 20 16:00 22 APR 20 12:00 22 APR 20 11:00 22 APR 20 10:45 22 APR 20 07:55	Insura	Ince Clinical Details CLINICAL CONSULTATION CLINICAL CONSULTATION CLINICAL CONSULTATION CLINICAL CONSULTATION This is the description for Grand Temp This is the description for Grand Temp Palpate Numbers () Lesions () CLINICAL CONSULTATION	Search Options: Status Incomplete Complete Status Recently Viewe From To Vet Code Lab Ref Uninvoiced Clinical Record Has uninvoiced drugs V Is a Virtual Visit Containing Text Analysis Group All Groups All Record Recently Recentl



Contacting the VisionVPM Service Desk

If you require help throughout the steps described in this document, please contact the VisionVPM Service Desk.

	New Zealand	Australia
Phone	0800 847 876	1800 150 264
Email	support.visionvpm@covetrus.com	

Document Information

Document Title	Virtual Visits
Created by	Hayley King
Last Modified	04/05/20
Current as of VisionVPM build	2020.14

