

Understanding the TABS in EzyVet!

The FIRST Level of tabs in the system has a different color associated to it.



Dashboard brings you to your calendars and worklists

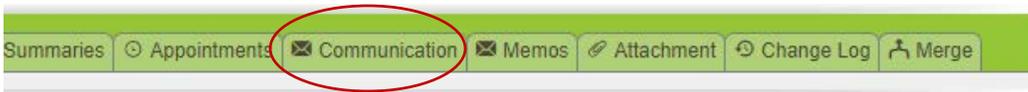
Contacts brings you to the client's record.

Patients brings you the patient's holistic record.

Clinical brings you the patient's specific visit record.

The SECOND Level of tabs in the system relates to a specific record. (All the same color as its parent tab). The communication tab on this level is your *INTERNAL COMMUNICATION NOTES* (see section 4 for more information). These are not printed or emailed to clients or RDVMs within the medical chart (clinical summary).

Note: When you click on Communications on this tab, you will see both those communications entered in the medical chart and those internal to our organization. This is okay, the system roles the information up the layers of tabs.



The THIRD Level of tabs (buttons) are actions taken within that specific record.



Most Important Layer!!

Under your medical tab, in the clinical visit's record, you will find another set of buttons. This is your medical record. This information pulls into a clinical summary sent to clients or RDVM. MOST of your COMMUNICATIONS will live under this communication tab.

+ Client Communication (1)

<input type="checkbox"/>	Date/Time	What	Reason	Who	Destin
<input type="checkbox"/>	07-20-2018 2:11:55pm			259554 - "Emmett" Mancuso	
Spoke with Client on the phone about Emmett's Visit					
Page: 1 of 1 5 Items/Page					

+ Vet Communication (1)

<input type="checkbox"/>	Date/Time	What	Reason	Who	Destin
<input type="checkbox"/>	07-20-2018 2:12:39pm			259554 - "Emmett" Mancuso	31563
Spoke with the Doctor at Emmett's Referring Practice about Emmett's Visit					
Page: 1 of 1 5 Items/Page					

1. Memo (Business Related Communications)

Memos are a form of internal communication. There are two forms of memos: record based and standard.

* Record-based memos are tied to a record be it client, patient, or case visit. It is important to note that these memos are not part of the medical or patient chart, and all content will be strictly between the recipients of the memo.

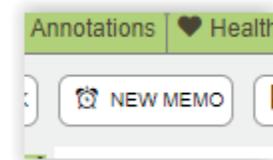
A scenario to use a Record-based memo, an interesting case study you would like to share with your colleagues

* Standard memos do not tied to a record and should be used for communication like department information or FYI messages. Treat it like an email inbox, where your email isn't linked to a patient's chart.

Standard Memos are created by clicking on the envelope on the top right hand corner of the screen.



Record-based Memo can be created by clicking on New Memo from the patient or case visit.



User Groups can be set by the systems team and can have a specific group of users associated to a group (like a distribution list).

Add your recipients, (click the green plus sign to add others). Do not worry about the email address that appears.

Add your Subject, Message and any attached files. Click Send.

The screenshot shows a form with the following fields and controls:

- Urgent:** A checkbox.
- User Group:** A dropdown menu currently showing "(BLANK)".
- Buttons:** "Add Recipients" and "Remove All".
- Recipients:** A list of input fields. The first contains "Daniela Mancuso" and "vet-hosp@cornell.edu". The second contains "(BLANK)" and "vet@ezyvet.com". A green plus sign is to the right of the list, and red minus signs are to the right of each recipient.
- Subject:** A text input field.
- Message:** A large text area for the memo content.
- Add Files (Max 50MB each):** A section with a "Choose File" button and "No file chosen" text.
- Buttons:** "SEND" and "CANCEL".

2. Record Dashboard

This is the callback/communication worklist; this is where the user will monitor communication actions needed on patients/clients.

The status is used to filter between pending callbacks vs done callbacks. There are a variety other filters to use to help find the callback you are looking for.

Most commonly you would have the status as pending, the department set for your service and the filter of either Reason or For User.

Reason can be used send a call back to a group, for example, 'LVT Communication.' This means a communication is not assigned to a certain user but to a group of users in a service to then self-assign and complete.

For User is must be filled in. Therefore, if the sender has specific person to send this to, the sender will change the field to reflect this. If they are sending it to Reason (or group of people), they keep their name in this field until self-assigned.

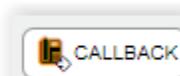
3. An Actionable Communication

An actionable communication is a communication that requires someone to complete a task. In EzyVet this is call a callback.

A few scenarios you would use a callback in EzyVet:

1. Client calls with a concern regarding a patient that came in yesterday.
2. Client calls would like to speak with someone about their pet but the call is not referencing a recent case.
3. RDVM calls about a patient and would like to speak with a DVM. The patient does not have a visit setup but is an established patient in the system.

Find the Callback button under each of the following tabs: Contacts record (blue); Patients record (purple) and Clinical (visit) record (green).



4. An Internal Communication

An internal communication is a communication that *should be associated to a client, patient or clinical (visit) record* however is **not part of the medical chart provided to the client or RDVM**. These communications are for our own record keeping.