

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.

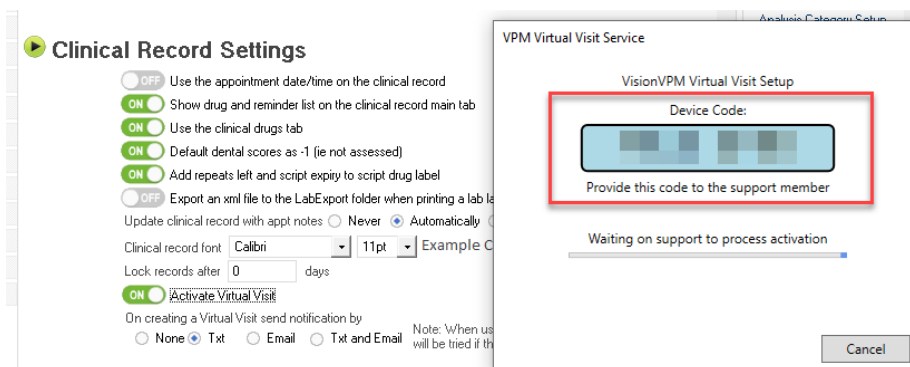
Setup

Virtual Visit Activation

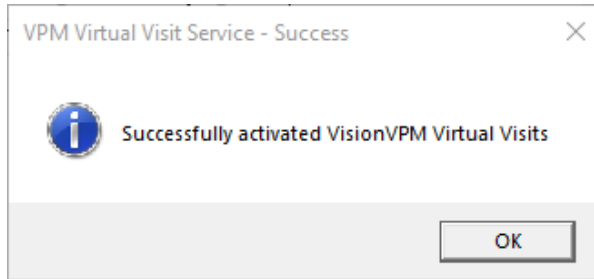
The VisionVPM Implementation team will schedule a time to set up and walk you through the functionality.

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**.



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.

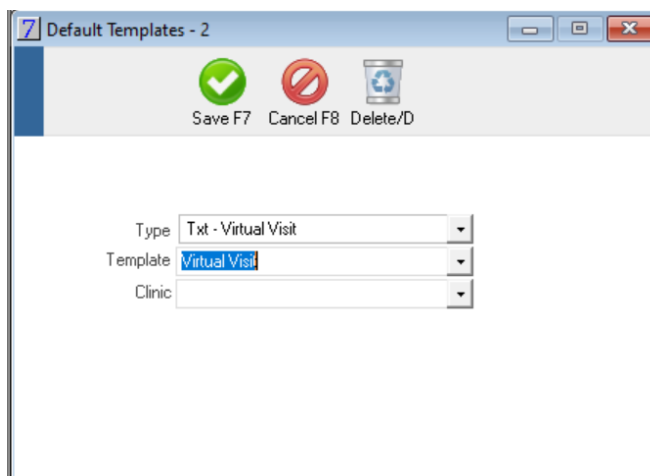
▶ Clinical Record Settings

OFF Use the appointment date/time on the clinical record
 ON Show drug and reminder list on the clinical record main tab
 ON 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
 ON Export an xml file to the LabExport folder when printing a lab label
 Update clinical record with appt notes Never Automatically Prompt
 Clinical record font: Calibri 11pt Example Clinical Text
 Lock records after 0 days
 ON Activate Virtual Visit
 On creating a Virtual Visit send notification by
 None Txt Email Txt and Email

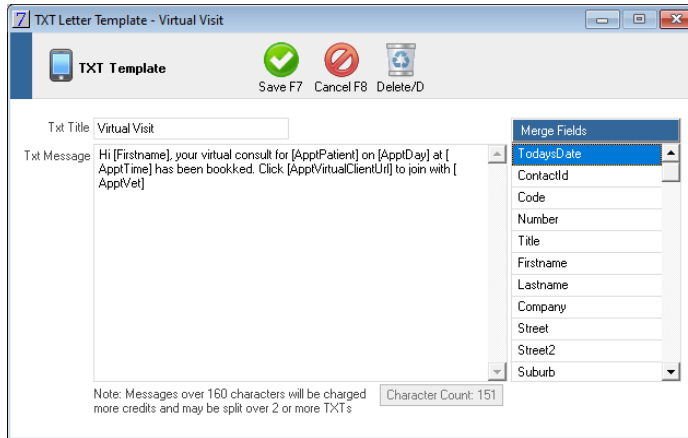
Note: When using Txt or Email the alternative method will be tried if the preferred method cannot be used.

Default Templates

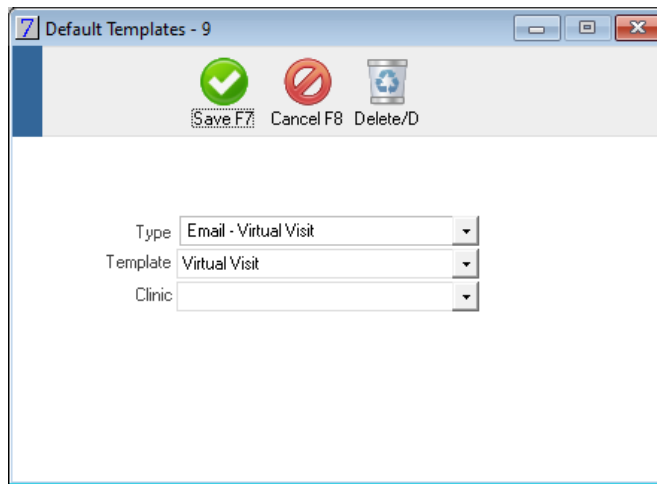
1. Go to **Maintenance > Lookup Lists > General Lists > Default Template**.
 - a. Create a txt template with a **Type of Txt – Virtual Visit**.



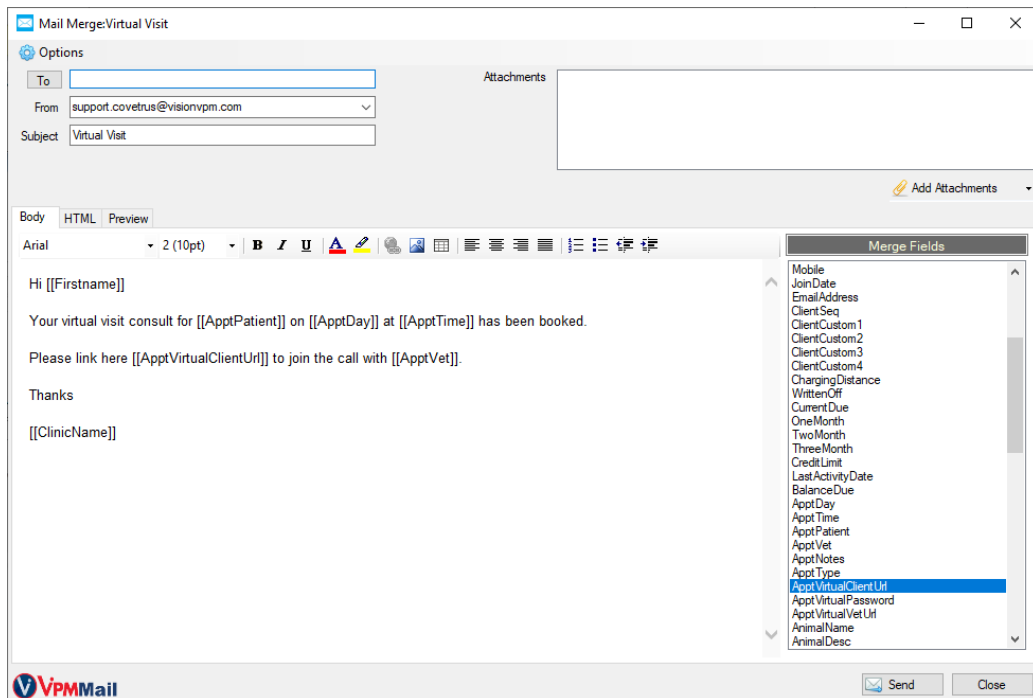
- b. This can include merge fields for the appointment day/time and online meeting link



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



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



Workflow

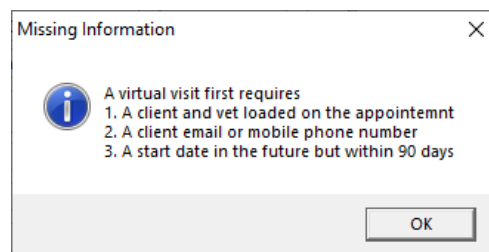
Create scheduled online meeting

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:



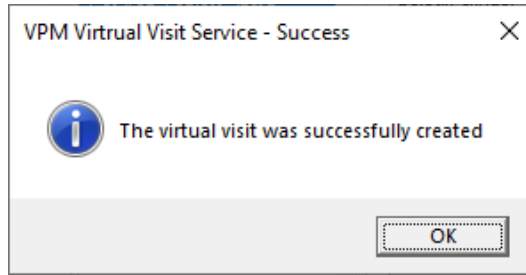
Create the virtual visit link

- 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.

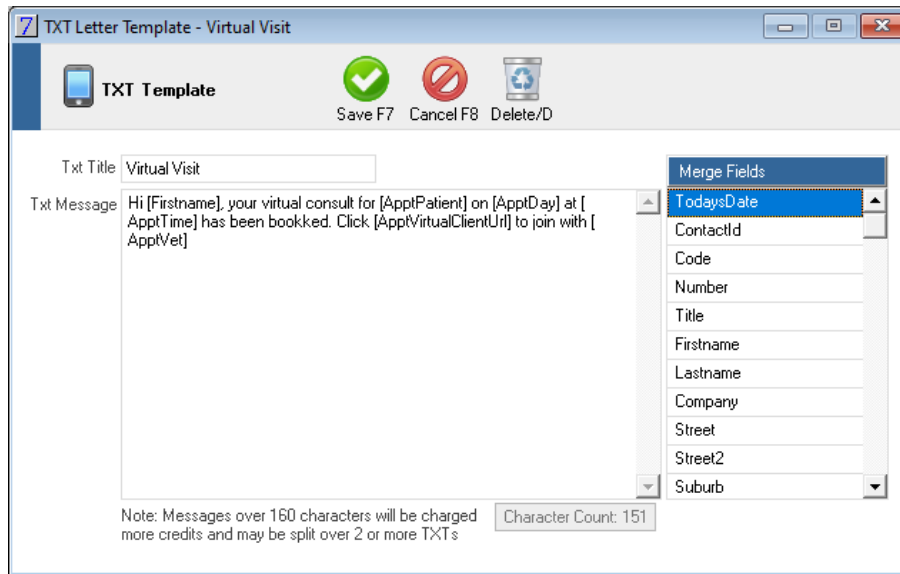
- From a Clinical Record click the **Virtual Visit** tab and enter the date and time of the virtual visit meeting if different from the clinical record date and time.
 - The start date cannot be before the current date and time or more than 90 days in the future.

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

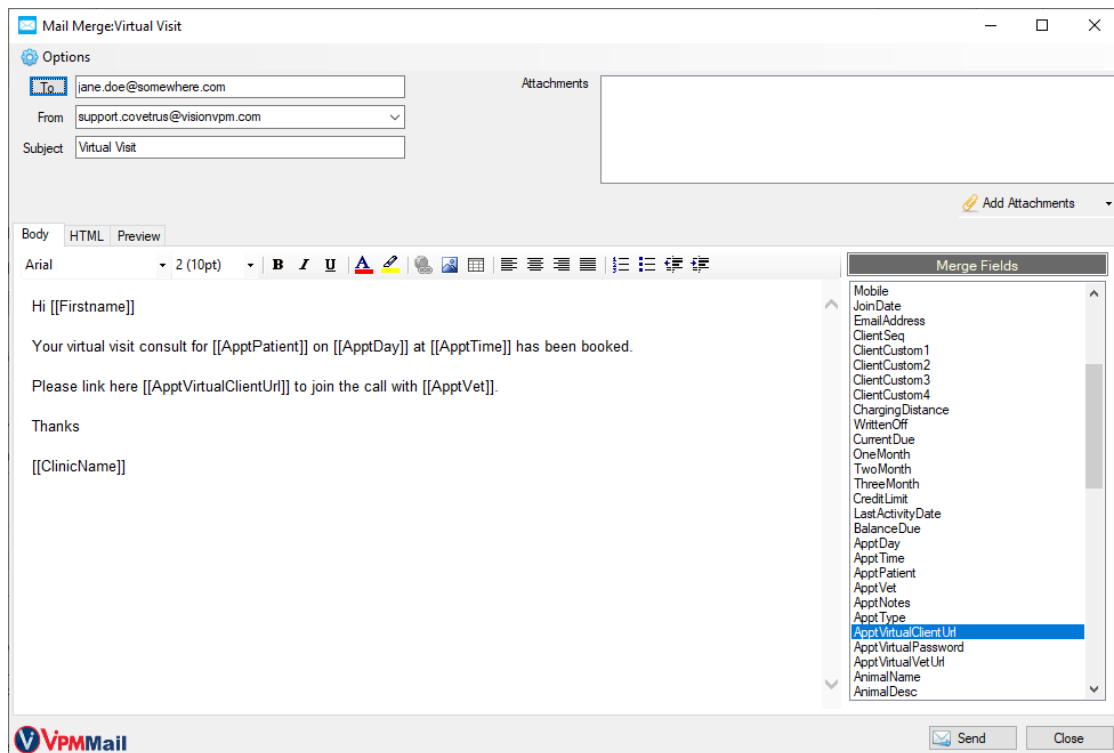
- Click **OK** on the window showing the virtual visit has been created.



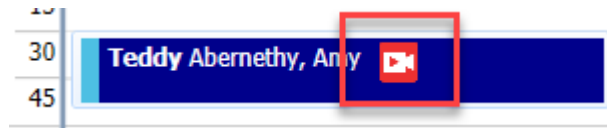
- When sending a txt, confirm the details in the **SMS Txt Message** windows then, click **Send**.



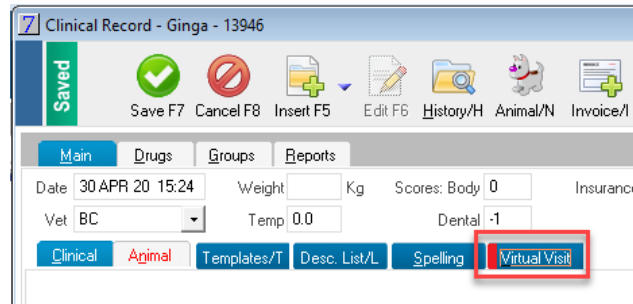
- When sending an email, confirm the details in the email window, then click **Send**.



- 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

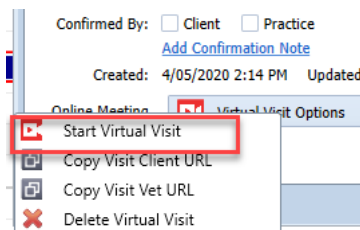
When you change the appointment to a different date and/or time, or the primary vet associated with the appointment is changed, the link for the scheduled virtual visit will update and automatically open the SMS Txt Message and/or Email window to send the updated details to the client.

Delete scheduled virtual visit

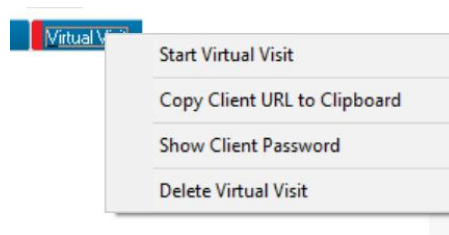
The link to the scheduled virtual visit can be deleted from the Appointment Book window, the appointment or the clinical record by clicking the Virtual Visit option and selecting **Delete Virtual Visit**. This will open a blank SMS Txt Message window from where you can select the required template or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

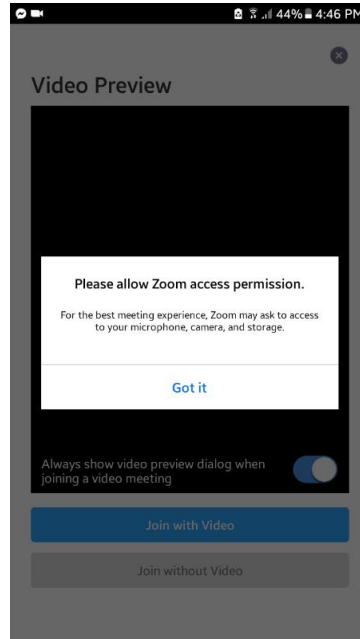
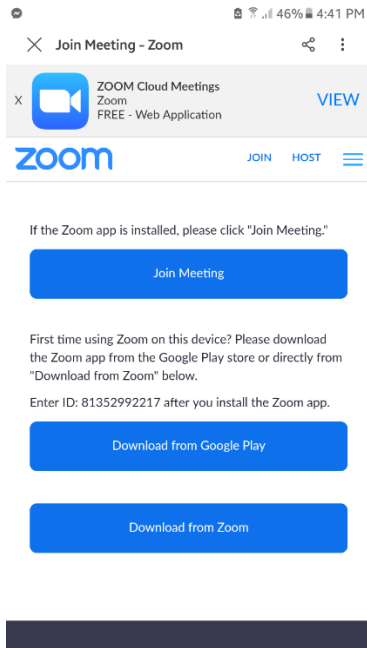


4. From the clinical record window, click **Virtual Visit** and then click **Start Virtual Visit**.

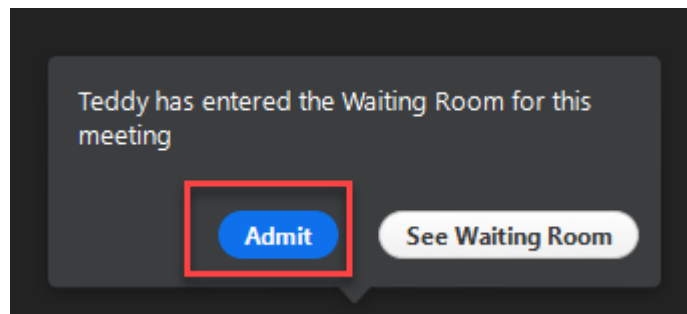


Carry out the virtual visit

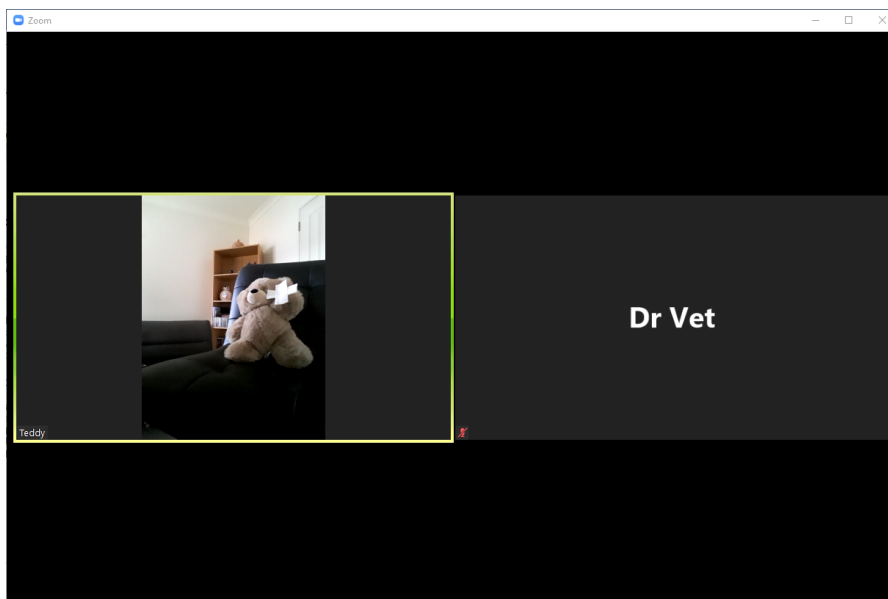
1. After clicking to start the virtual visit the videoconference application will start.
 - a. Open the Zoom app
 - b. Give permission to use the camera and audio.
2. The client will click on their link in their txt or email to join the video conference call.
3. They will need to download the Zoom app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



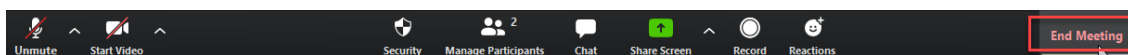
- The vet will be prompted when the client joins the call so the vet can click **Admit**.



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



- Click **End Meeting** to end the call.



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.

Date	Vet	Ref	Lab	Photo	PACS	Virtual	Kg	Temp	Body	Dental	Insurance	Notes	View Screen Report
24 APR 20 16:22	CK	18194A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>						CLINICAL CONSULTATION	
16 AUG 17 16:45		6853A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						CLINICAL CONSULTATION	
3 NOV 16 16:59		3740A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						Palpate Numbers () Lesions () Admitted: Clinical	

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**.

Client Name	Animal	Date	Incomplete	Vet	Insurance	Clinical Details
Parker, Ms Trinie	Sooty	24 APR 20 17:42	<input type="checkbox"/>	CK		CLINICAL CONSULTATION
Kattlin, Miss Kendra	Fred	24 APR 20 16:22	<input type="checkbox"/>	CK		CLINICAL CONSULTATION
Victory Saint Stud	Labonaire	23 APR 20 16:04	<input type="checkbox"/>	CK		CLINICAL CONSULTATION
King Equine	Flash	22 APR 20 16:00	<input type="checkbox"/>	CK		CLINICAL CONSULTATION
King, Mrs Hayley	Allie	22 APR 20 12:00	<input type="checkbox"/>	CK		This is the description for Grand Template
Shumack, Mr Matt	Cuckoo	22 APR 20 11:00	<input type="checkbox"/>	CK		This is the description for Grand Template
Lintolt, Ms V Viv	Annabel	22 APR 20 10:45	<input type="checkbox"/>	CK		Palpate Numbers () Lesions ()
Ernie & Animal Friends	Tammy	22 APR 20 07:55	<input type="checkbox"/>	CK		CLINICAL CONSULTATION

Search Options:

Status: Incomplete Complete All Recently Viewed

From:
To:

Vet Code:
Lab Ref:

Uninvoiced Clinical Record
 Has uninvoiced drugs
 Is a Virtual Visit

Containing Text:

Analysis Group: All Groups

Insurance Status: All

Rebuild

Close when leaving Records: 8

Contacting the VisionVPM Service Desk

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

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Document Information

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