



# VetKey Tutorial

Practice Performance Module

Version 1.0

Powered by Vet Think Lab

## Summary steps to using the VetKey system, Practice Performance Module

See complete instructions below.

- 1 Complete the account administrator's profile:  
Setup > Member Folders > Edit
- 2 Add other practice members to the system and set access restrictions:  
Setup > Member Folders > Add
- 3 Enter recurring closed and partially closed days, holidays, and other events:  
Setup > Scheduler
- 4 Make daily performance entries:  
Practice Performance > Production Data Entry
- 5 Review daily, monthly, and yearly performance:  
Practice Performance > Performance Dashboard

Watch this brief tutorial video: <http://ow.ly/SYKlr>

## Functioning Tabs with VetKey v1.0

### Setup

Member Folders, Scheduler, and My Clinic

### Practice Performance

Production Data Entry and Performance Dashboard

## Setup - Member Folders

### Setup New Practice Member

Add 

Edit 

Click the **ADD MEMBER** icon to setup a new Practice Member. Note that the account administrator is partially setup upon account creation, and the administrator's member information can be completed in the Edit section.

Enter the fields:

Member Name

Member Initials (do not duplicate any other member's initials)

Select the member's position in the drop down list, which is prepopulated for immediate use.

- To add a new position name, enter the name in the **ADD NEW POSITION** box and click **OK**.
- To edit a position name, click the **EDIT** icon and change the name.
- To delete a position name, click the **TRASH** icon.



Upload a photo image of the member by clicking the **IMAGE** icon, which will display in the upper left corner when the member is logged in. Documents pertaining to the member can be uploaded by clicking the **ATTACHMENT** icon, and retrieved from the Summary Panel on the right of the screen by clicking on the document title.



Click the **PERSONAL INFO** icon to enter the member's contact information and employment status fields:

Phone 1	Address
Phone 2	Start Date
Email	Notes

Click the **SAVE** or **CANCEL** button to complete or delete your entries.



Click the **SETTINGS** icon to set the member's VetKey access to the following navigable areas, defined as Authorization Levels (note, the account administrator maintains full access to all Authorization Levels):

**Setup - Practice Members:** Gives access to view, add, and edit practice member folders.

**Setup - Scheduler:** Gives access to make entries and adjustments to the practice scheduler. Functionality in the practice scheduler will be expanded in future versions.

**Practice Performance - Data Entry:** Gives access to enter end-of-day production numbers.

**Practice Performance - Performance Dashboard:** Gives access to the practice performance display.

Click the **SAVE** or **CANCEL** button to complete or delete your entries.



### **Edit Existing Practice Member**

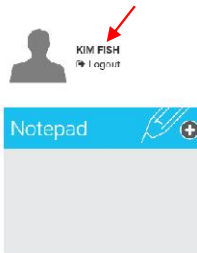
Select the practice member to edit by clicking the **CHOOSE A MEMBER** field.

Click the **PERSONAL INFO** icon to change member's contact information and employment status fields. Additional fields to complete include:

End Date
Last Evaluation Date
Status (drop-down)

Click the **SETTINGS** icon to change the member's VetKey access to the various Authorization Levels.

Click the **SAVE** or **CANCEL** button to complete or delete your entries in each section.



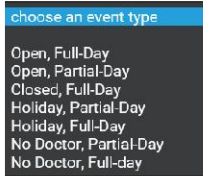
### Change password

Old password  
 New password  
 New password again  
 Change password

To change your VetKey login password, click on your **PRACTICE MEMBER NAME**, then enter your old password, followed by your new password (entered twice).

Members can enter notes in the **NOTEPAD** section, and click enter to save, or "X" to cancel.

## Setup - Scheduler



The scheduler assumes all days are "Open, Full Day" unless otherwise changed by selecting **CHOOSE AN EVENT TYPE** to change the event, which will reset that day's performance prediction, as displayed in the Data Entry screens and Performance Dashboard. Event options include:

- Start and End Dates
- Recurrence - daily, weekly, monthly, and yearly

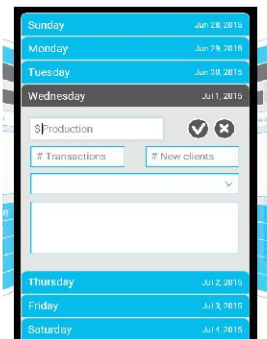
Edit entries by clicking on the created event from the list populated in the Summary Panel on the right of the screen.

Click the **SAVE EVENT** or **CANCEL** button to complete or delete your entries.

## Setup - My Clinic

*Coming Soon - Account administrator will be able to upload or change the practice logo, and view account information and settings.*

## Practice Performance - Data Entry



Navigate through the data entry screens by:

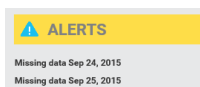
- Clicking on the date in the slider
- Clicking to the right or left of the main slider to go to earlier or later dates
- Clicking on the specific date in the **CALENDAR** located in the Summary Panel.

Data fields to enter include:

- Production
- Transactions
- New Clients
- Notes

Click the **CHECK MARK** button to save or the **"X" MARK** button to delete your entries. Note that days with no revenue also need to be saved.

Preset Event Types, including the default "Open, All Day" event, will display on save. If the event type is changed, save by clicking the **CHECK MARK** button.



Alerts display in the Summary Panel when daily entries are missed.



## Bulk Uploader

The **BULK UPLOADER** icon is located at the right end of the **PRACTICE PERFORMANCE** menu bar. It is accessible only to those members with Performance Dashboard authorization. Two year's worth of data for revenue, transactions, and new clients can be entered here, and will generate monthly performance predictions going forward, and for six months back.

## Practice Performance - Performance Dashboard



### Monthly Progress

The Monthly Progress defaults to the current month, but can be changed using the **MONTH / YEAR** dropdown.

Monthly Progress displays MTD totals, as well as comparisons to MTD prediction (**RED LINE**) and MTD previous year (**GREEN LINE**) for the following values:

- Revenue
- Transactions
- Average Charge per Transaction (ACT)
- New Clients - The red line for this value is a goal, rather than a prediction, set at 6.5% of transactions.



### Performance Charts

The Performance Charts default to the current month, but can be changed using the **MONTH / YEAR** dropdowns, or selected for a range of months.

The Performance Charts display date range (or MTD for current month if incomplete) data, with plotted trend lines and comparison to prediction (**RED DASHED LINE**). Daily entries that are not saved as "Open, Full Day" will display adjusted predictions. The Performance Charts include:

- Revenue
- Transactions
- Average Charge per Transaction (ACT)
- New Clients - The red dashed line for this value is a goal, rather than a prediction, set at 6.5% of transactions.
- Daily Performance - Day of the week revenue summary for the period of time selected.



Click the **EXPAND** icon within the individual Performance Charts to display the selected chart in full-screen mode.

Questions? Email [Contact@VetKey.net](mailto:Contact@VetKey.net)