



# VetKey Quick Start Checklist

Tutorial Series

Version 2.0

Powered by Vet Think

## Summary steps to set up your VetKey system

Click on links to access detailed instructionals, video tutorials, and FAQ

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### Platform Access the PLATFORM Panel

#### PLATFORM Setup

The platform is the starting point for a single practice, and will allow shared setup for multiple practices in a practice group. Customization at the individual practice level can be done through the Practice setup.

##### ROLES AND PERMISSIONS

- Add platform managers' names and emails.
- Review Practice Member roles that come with VetKey, and edit as needed.
- Permissions**

##### SCHEDULER

- Review Appointment Types that come with VetKey, and edit as needed.
- Review Closed Reasons that come with VetKey, and edit as needed.

##### FORMS

- Create custom Merge Fields to be used in your forms. These would be blocks of text you would like to template. VetKey comes with standard merge fields for inserting clinic, client, and patient data in the forms, which can be accessed through the Practice Forms.
- Create Practice Forms for Client Consent, Patient Care Instructions, Preventative Care Programs, Disease Handout Business Forms, and more. Insert merge fields to customize the forms on execution.

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### Setup Access the SETUP Panel

#### PRACTICE Setup

##### PRACTICE

- Verify the Practice Details.
- Setup your Practice Members, including setting permissions and doctors' schedules.
- If a Practice Group with multiple practices, customize your Merge Fields as needed.
- If a Practice Group with multiple practices, customize your Practice Forms as needed.

##### CODES

*You have the option to either have your current categories, services, and inventory items imported to VetKey, or you can use a standard Category and Service Item list to get you started. Then complete the code setup process.*

- Review Categories and edit as needed.
- Review imported Service Items and edit as needed.
- Review imported Inventory Items and edit as needed.
- Create Lists for related services where one or multiple items may be selected.
- Create Groups for bundled services. Groups can include combinations of Lists, Service Items, and Inventory Items.
- Review the Diagnosis list that comes with VetKey, and edit as needed.
- Create your Diagnostic Protocols which are triggered by the Diagnosis and can include Groups, Lists, Service Items and Inventory Items.

- Create your Treatment Plans which are triggered by the Diagnosis and can include Groups, Lists, Service Items, and Inventory Items.
- Create your Wellness Plans which can include Groups, Lists, Service Items, and Inventory Items.
- Create your Estimates which can include any of the above code setups. Individual patient estimates can be created from the patient records and will be added to this list for reuse.

#### REMINDERS

- Create Communication Templates for Emails, Text Messages, Postcards, and Letters. Insert merge fields to customize the templates on execution.
- Setup Communication Timing for Emails, Text Messages, Postcards, and Letters, selecting from the Communication Templates.
- Create Reminder Lists for related services to prevent duplication of similar reminders (i.e. Examinations).
- Setup Reminder Protocols for each service that needs a future follow-up, whether for itself or for other services. Multiple reminder triggers can be created to help auto-consolidate reminders. Customize communication timing as needed.

#### SCHEDULER

- Review imported Appointment Types and edit as needed.
- Create Scheduling Rules for Appointment Types and Doctors.
- Add planned closed days, partially closed days, holidays, and other events to the Practice Calendar.

#### MEDICAL NOTATIONS

- Review imported Medical Notation Categories and edit as needed.
- Create Medical Notations to attach to Client Care Instructions and for ease of entry in the Patient Medical Record.

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 **Dashboard** Access the PERFORMANCE DASHBOARD Panel

### PERFORMANCE DASHBOARD Setup

#### HISTORY

- Enter monthly revenue and transaction history for the previous two years to activate the Performance Prediction algorithm.