



# Virtual appointments

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## About virtual appointments

Use *virtual appointments* to do many types of clinical work remotely. As a result, it is not necessary to go to a veterinary practice or a residence to do the work.

A virtual appointment operates with a video call company. ezyVet uses Zoom for virtual appointments.



**Note:** For more information about Zoom, refer to <https://zoom.us>.



**Note:** An ezyVet virtual appointment is a type of *telemedicine* feature.

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### Related information

[About the Zoom integration \(on page 21\)](#)

# System requirements for Zoom virtual appointments

ezyVet uses Zoom for virtual appointments. When you start a virtual appointment, your web browser automatically downloads the Zoom app and installs it on your device.

When clients connect to the call, their browser automatically downloads and installs the Zoom app.



**Tip:** Before you use the virtual appointments feature, install the Zoom app on all of the applicable devices in your organization.

## The Zoom *cloud recording* feature

A virtual appointment can automatically save the recorded call of a virtual appointment in the applicable clinical record. You can get access to the recorded call directly from the clinical record.

For correct operation of recorded calls, you must use a Zoom plan that has the Zoom *cloud recording* feature. If you use a Zoom plan that does not have cloud recording, ezyVet cannot save a recorded call.

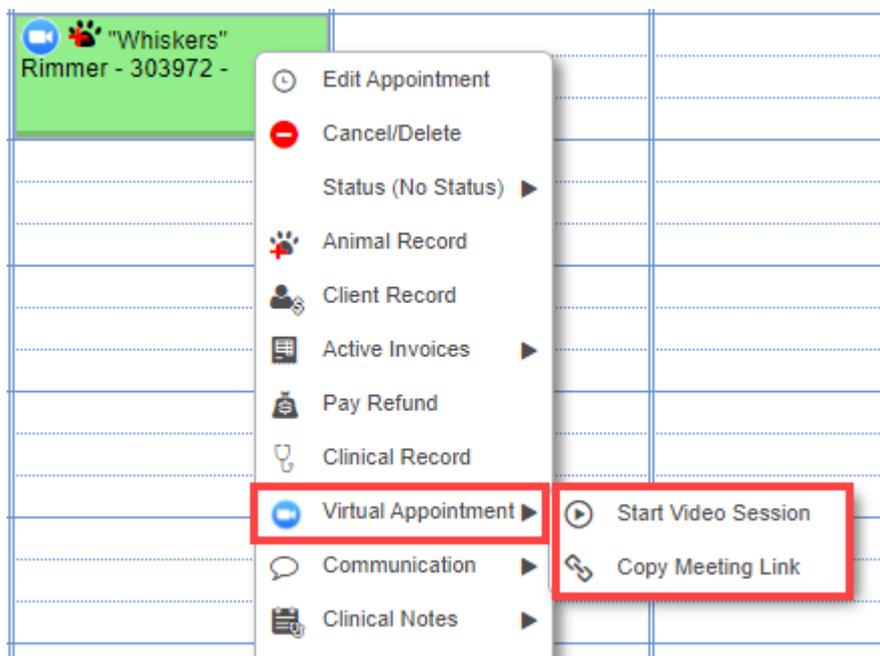


**Note:** For more information about the applicable Zoom plans:

- [Recommended Zoom plan for virtual appointments \(on page 4\)](#)
- [support.zoom.us/hc/en-us/articles/203741855-Cloud-recording](https://support.zoom.us/hc/en-us/articles/203741855-Cloud-recording)

## Calendar commands that are applicable to virtual appointments

The ezyVet calendar has commands that are related to virtual appointments. If you select a calendar appointment that is a virtual appointment and open a shortcut menu, ezyVet shows the commands.



This table gives information about each command:

Command	Description
<b>Virtual Appointment</b>	Select to show other commands that are related to the virtual appointment.  <div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px; margin-top: 10px;">  <b>Note:</b> If the calendar item is not a virtual appointment, ezyVet does not show this command.         </div>
<b>Start Video Session</b>	Select to start the call.
<b>Copy Meeting Link</b>	Select to put a copy of the video call address in your device's clipboard. Then, you can paste the address and send it to other persons.

# Recommended Zoom plan for virtual appointments

Zoom has different types of *plans*. Each plan has a different set of features and a different cost. For the best performance of Zoom with ezyVet *virtual appointments*, use a dedicated Zoom Business plan.



**Note:** For information about Zoom plans, refer to [zoom.us/pricing](https://zoom.us/pricing).

If you use a Zoom Business plan, you can make permanent accounts for your organization's staff members. As a result, they always have access to a correctly configured Zoom account for virtual appointments. Then, you can use the free Zoom Basic plan for staff who do not use virtual appointments or who only use Zoom temporarily. For example, staff could use the Basic plan accounts for remote staff meetings.

**Example:** Callisto Vets uses the ezyVet virtual appointment feature. For the best performance, the practice manager buys a Zoom Business plan.

The practice manager uses the Business plan to make three permanent Zoom accounts for staff who do virtual appointments:

- virtualappointment1@callistovets.com
- virtualappointment2@callistovets.com
- virtualappointment3@callistovets.com

The staff members who use these accounts always have access to a correctly configured virtual appointment.

Other staff of Callisto Vets do not use virtual appointments and it is not necessary for them to have a permanent Zoom account. Each of these staff members uses the free Zoom Basic plan to make their own Zoom account.

## The Zoom *cloud recording* feature

A virtual appointment can automatically save the recorded call of a virtual appointment in the applicable clinical record. You can get access to the recorded call directly from the clinical record.

For correct operation of recorded calls, you must use a Zoom plan that has the Zoom *cloud recording* feature. If you use a Zoom plan that does not have cloud recording, ezyVet cannot save a recorded call.



**Note:** For more information about the applicable Zoom plans:

- [Recommended Zoom plan for virtual appointments \(on page 4\)](#)
- [support.zoom.us/hc/en-us/articles/203741855-Cloud-recording](https://support.zoom.us/hc/en-us/articles/203741855-Cloud-recording)

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**Related information**

[Configure the Zoom integration \*\(on page 22\)\*](#)

**Related tasks**

[Configure a Zoom virtual appointment type \*\(on page 17\)\*](#)

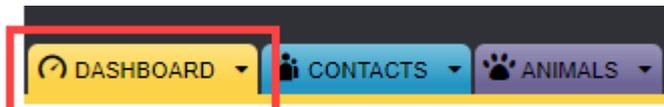
# Make a virtual appointment

## Before you start:

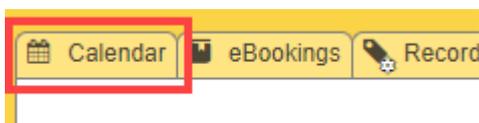
- Make sure your site has a configured Zoom integration
- Make sure that your site has a configured virtual appointment type

**About this task:** Do this procedure to make a virtual appointment.

1. Select **DASHBOARD**.



2. Select **Calendar**.

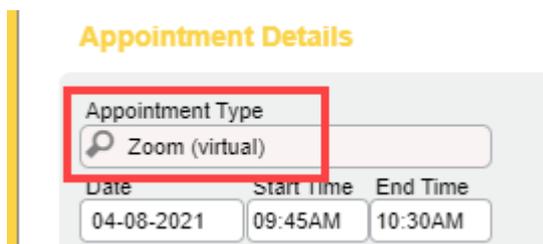


ezyVet shows the calendar.

3. Select the applicable area in the calendar to make an appointment.

ezyVet shows the **New Appointment** interface.

4. In the **Appointment Type** box, select the applicable virtual appointment type.

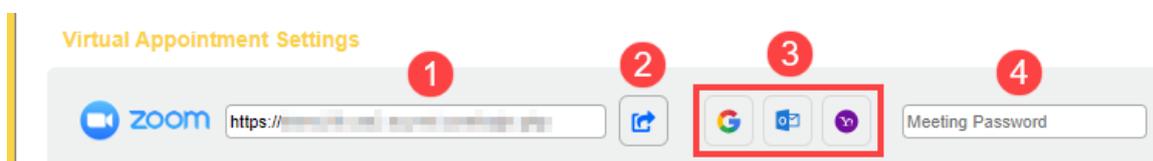


5. Select the client, the patient, and make other applicable settings.

6. Select **SAVE**.



ezyVet shows Zoom settings:



This table gives the available settings:

1	ezyVet shows the Zoom address of the call in this box. You can send the address to other call participants.
2	Select this button to automatically open the Zoom app and start the call.
3	Do not select these buttons. They have no function.
4	<p>This box shows the password that ezyVet automatically makes for the call. If necessary, you can enter a different password.</p> <p> <b>Note:</b> This setting is only applicable if you set <b>Password required</b> to <b>YES</b> in the configuration of the virtual appointment. For more information, refer to <a href="#">Configure a Zoom virtual appointment type (on page 17)</a>.</p> <p> <b>Note:</b> After you enter the password, make sure that you select <b>SAVE</b> :</p>

7. Select **SAVE**.



**Result:** Customers can use the virtual appointment to connect to the video call.

## Show virtual appointment information in a clinical summary

You can show virtual appointment information in a patient's clinical summary. The **Virtual Appointment Recordings** setting in the **Exclude** box controls if ezyVet shows the information:

### Summary

Summary Name  
🔍 (BLANK)

Start      Template      End

Split by:  Type  Date

**Exclude**      **Include**

- Virtual Appointment Recordings
- Animal/Owner Details
- Health Status
- Presenting Problems
- History
- Pertinent History
- Physical Exam
- Assessments
- Plan

**Include All >>**      **<< Exclude All**

The **Virtual Recordings** section of a clinical summary ezyVet shows the virtual appointment information. To open a recording, select the applicable preview image that shows in the **Virtual Recordings** section:

### Edit Clinical Summary

Summary Name (BLANK) Animal 100450 - "Bella" Atkins Consult 303471 - "Bella" Atkins (19/05/2020)

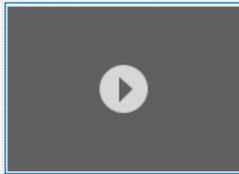
Included Virtual Appointment Recordings, Animal/Owner Details, Master Problems Notes

\* This Summary will include Diagnostic Attachments

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, insert image, insert table, link, unlink, source, and search.

#### Virtual Recordings

"Bella" Atkins (Felin) Virtual - Zoom (1 of 2)

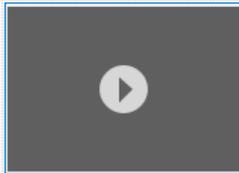


Time: 19/05/2020 08:00PM to 08:05PM

Meeting ID: 8841630

Staff member: Christina Langley

"Bella" Atkins (Felin) Virtual - Zoom (2 of 2)



Time: 19/05/2020 08:00PM to 08:05PM

Meeting ID: 884163

Staff member: Christina Langley

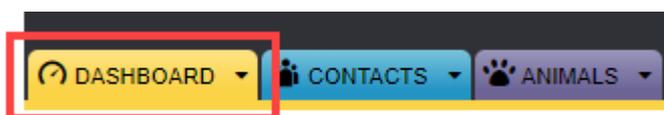
# Start a Zoom virtual appointment from the calendar

After you make a Zoom virtual appointment, you can start the call directly from the ezyVet calendar.

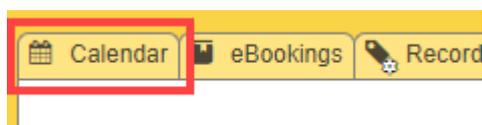
**Before you start:** You must:

1. Make sure that ezyVet has a configured Zoom integration
2. Make sure that ezyVet has a configured virtual appointment type
3. Make a Zoom virtual appointment

1. Select **DASHBOARD**.



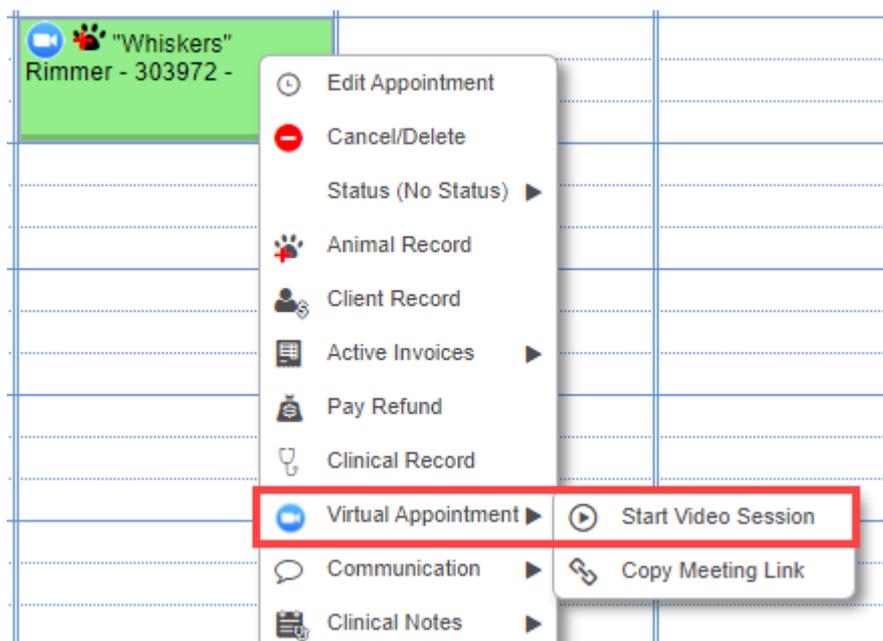
2. Select **Calendar**.



ezyVet shows the calendar.

3. Find the applicable appointment.

4. Right-click the appointment and select **Virtual Appointment > Start Video Session**.

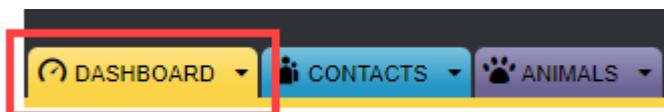


**Result:** ezyVet starts the call.

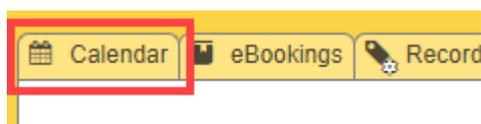
# Get access to virtual appointment recordings (calendar method)

You can use the ezyVet calendar to get access to virtual appointment recordings of a patient's clinical record.

1. Select **DASHBOARD**.

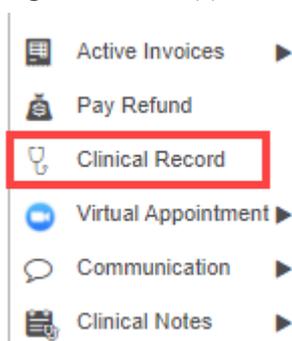


2. Select **Calendar**.



ezyVet shows the calendar.

3. Find the applicable calendar appointment.
4. Right-click the appointment and select **Clinical Record**.



ezyVet shows the patient's clinical record.

5. Select **Virtual Recordings**.



**Note:** If the clinical record has no related virtual appointments, you cannot select **Virtual Recordings**.

**Result:** ezyVet:

- Shows scheduled virtual appointments of the patient in the **Upcoming Virtual Appointments** section
- Shows recordings of the patient's virtual appointments in the **Virtual Recordings (Complete)** section

**Upcoming Virtual Appointments ( 1 )**

 UPDATE PENDING RECORDINGS

Show Disabled

"Whiskers" Rimmer

 START



Time: 09-12-2021 05:00PM to 06:00PM



Meeting ID:  
https://us02web.zoom.us/j/88351

Staff member: Christina Langley

Page: 1 of 1 5 Items/Page

1 - 1 of 1

**Virtual Recordings (Complete) ( 0 )**

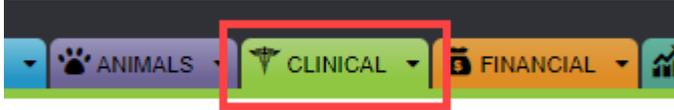
Show Disabled

No Results

## Get access to virtual appointment recordings (clinical record method)

You can use the patient's clinical record to access applicable virtual appointment recordings.

1. Select **CLINICAL**.



2. Find and select the applicable clinical record.

3. Select **Virtual Recordings**.



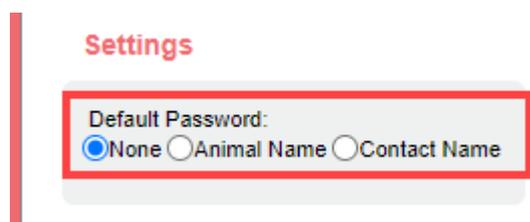
**Note:** If the clinical record has no related virtual appointments, you cannot select **Virtual Recordings**.

# About the password that ezyVet automatically uses for virtual appointments

When a practice manager configures the Zoom integration, they can set the password that ezyVet automatically uses for all call participants of a virtual appointment.

The applicable setting is **Default Password**. The **Default Password** setting is in the Zoom integration settings.

Figure 1. The Default Password setting



The table that follows gives the function of each option.

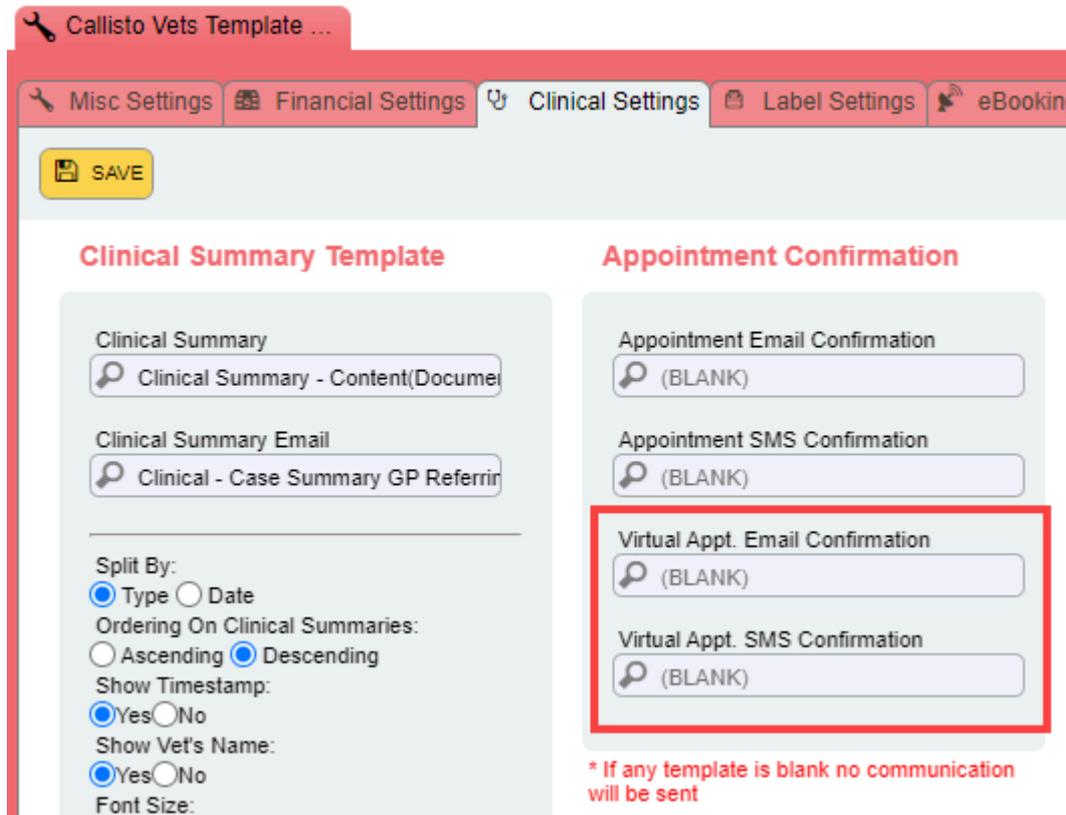
 **Note:** If you set **Password required** to **YES** in the configuration of the virtual appointment, the password that you enter when you make a virtual appointment overrides the **Default Password** setting.

Option	Function
<b>None</b>	If you select <b>None</b> , it is not necessary for call participants to enter a password to connect.
<b>Animal Name</b>	If you select <b>Animal Name</b> , call participants must enter a password to connect. The password is the name of the animal that is related to the virtual appointment.
<b>Contact Name</b>	If you select <b>Contact Name</b> , call participants must enter a password to connect. The password is the name of the contact that is related to the virtual appointment.

# Templates for virtual appointments

ezyVet has dedicated templates that a practice manager can set for *virtual appointments*. ezyVet uses the dedicated templates for email invitations and SMS invitations of virtual appointments.

Figure 2. Template settings for virtual appointments



# Template variables for virtual appointments

This table gives the template variables that are applicable to *virtual appointments*:

**Table 1. Template variables of virtual appointments**

Template variable	Function
AppointmentJoinLink	Shows the address of a virtual appointment call. Participants select the address to join the call.
AppointmentJoinPassword	Shows the password of a virtual appointment call. If you have set a password for the call, participants must enter the password to connect.

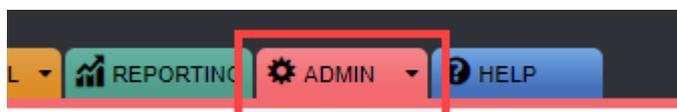
# Configure a Zoom virtual appointment type

Before staff can use *virtual appointments*, a practice manager must configure a virtual appointment type.

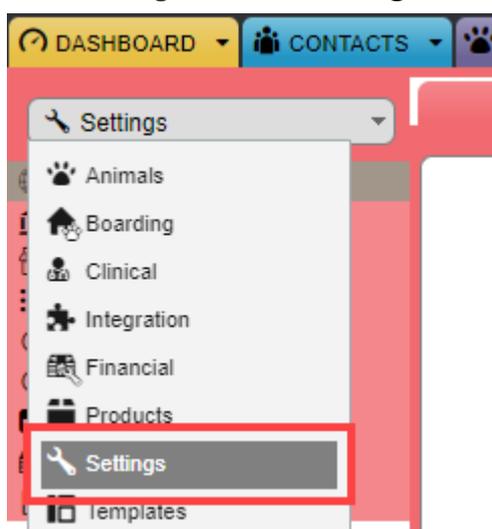
**Before you start:** Make sure that you configure the Zoom integration.

**About this task:** Do this procedure to configure a virtual appointment type.

1. Select **ADMIN**.



2. In the settings list, select **Settings**.

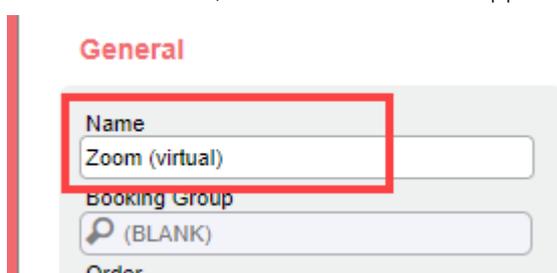


3. Select **Appointment Types**.



ezyVet shows the **New Appointment Type** screen.

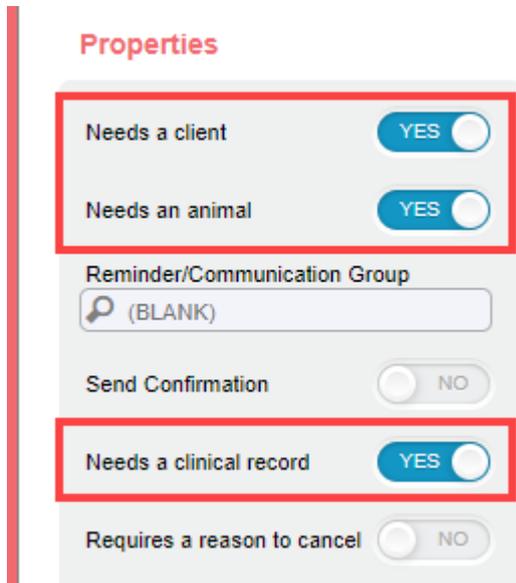
4. In the **Name** box, enter a name for the appointment type.





**Tip:** Use a name that makes it easy for staff to see that the appointment type is a virtual appointment type. For example, enter Zoom (virtual) .

5. In the **Properties** section, set **Needs a client** , **Needs an animal** , and **Needs a clinical record** all to **YES** .



**Properties**

Needs a client  YES

Needs an animal  YES

Reminder/Communication Group

Send Confirmation  NO

Needs a clinical record  YES

Requires a reason to cancel  NO

6. If necessary, set **Send Confirmation** to **YES** .



Reminder/Communication Group

Send Confirmation  NO

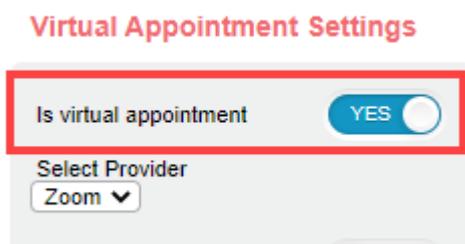
Needs a clinical record  YES



**Note:** If you set **Send Confirmation** to **YES** , ezyVet sends an email or SMS confirmation:

- Immediately after you make a virtual appointment
- If you change the date of an existing virtual appointment

7. In the **Virtual Appointment Settings** section, set **Is virtual appointment** to **YES** .



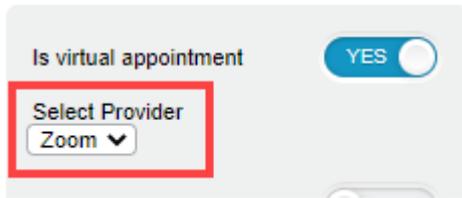
**Virtual Appointment Settings**

Is virtual appointment  YES

Select Provider  
Zoom ▼

8. Set **Select Provider** to **Zoom**.

### Virtual Appointment Settings



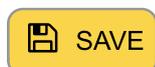
**Note:** The **Select Provider** setting also shows **Amazon Chime**. Do not select **Amazon Chime**. It does not have a function.

9. Refer to [Table 2 : Video call settings \(on page 19\)](#) to make the remaining settings.

**Table 2. Video call settings**

Setting	Description
<b>Start video when host joins</b>	If you set this to <b>YES</b> , the video call starts when the person who made the virtual appointment connects to the call.
<b>Password required</b>	<p>If you set this to <b>YES</b>, the call participants must enter a password to connect to the call. ezyVet automatically makes the password when you make a virtual appointment.</p> <div data-bbox="657 1211 1455 1386" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Note:</b> If necessary, you can manually enter a different password when you make the appointment. For more information, refer to <a href="#">Make a virtual appointment (on page 6)</a>.</p> </div> <p>If you set this to <b>NO</b>, the virtual appointment uses the <b>Default Password</b> setting of the Zoom integration. If <b>Default Password</b> is set to <b>Animal Name</b> or <b>Contact Name</b>, call participants must the enter applicable default password to connect to the call. For more information refer to <a href="#">Configure the Zoom integration (on page 22)</a>.</p>

10. Select **SAVE**.



**Result:** ezyVet has a configured virtual appointment type.

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**Related information**

[Recommended Zoom plan for virtual appointments \(on page 4\)](#)

[Configure the Zoom integration \(on page 22\)](#)

# About the Zoom integration

Use ezyVet's Zoom integration to do Zoom video calls for *virtual appointments*.



**Note:** An ezyVet virtual appointment is a type of *telemedicine* feature.

The Zoom integration connects to a related Zoom account. And the Zoom account is related to a Zoom plan. Your organization must sign up for a Zoom plan and configure the Zoom account. The integration then uses the settings of the Zoom account (for example, the Zoom user accounts that you make).



**Note:** For information about Zoom plans, refer to [zoom.us/pricing](https://zoom.us/pricing).



**Note:** You cannot use the group management feature of your Zoom account with the Zoom integration for ezyVet.

## Audio and video settings of Zoom calls

The Zoom integration automatically uses the audio and video settings of the related Zoom account.



**Note:** ezyVet does not change the audio quality or video quality of a Zoom call recording.

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### Related concepts

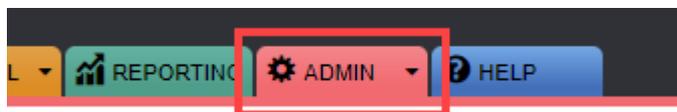
[About virtual appointments \(on page 1\)](#)

# Configure the Zoom integration

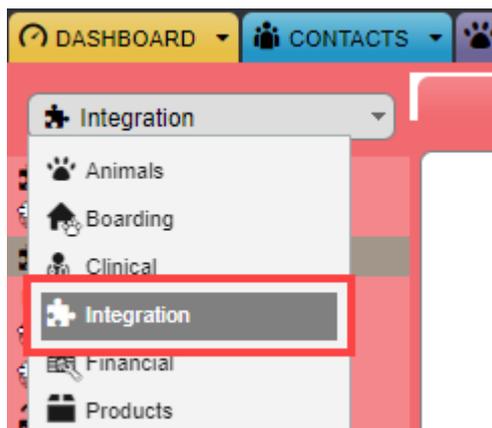
Before you use Zoom video calls for a [virtual appointment](#), you must configure the Zoom integration for ezyVet.

**Before you start:** Make sure that your organization has a Zoom plan with the Zoom cloud recording feature

1. Select **ADMIN**.

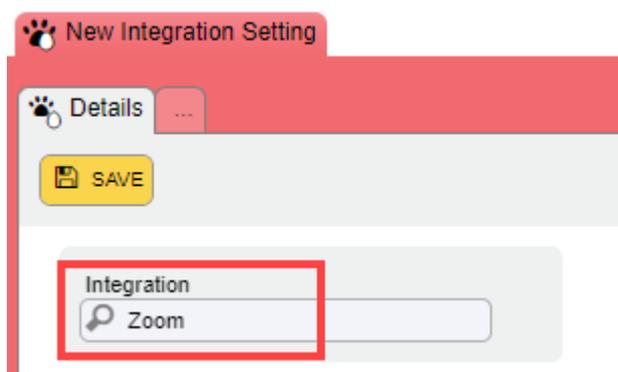


2. In the settings list, select **Integration**.



ezyVet shows the **New Integration Setting** screen.

3. In the **Integration** box, select **Zoom**.



4. If your site uses a department configuration, select the applicable department in the **For Division** box.

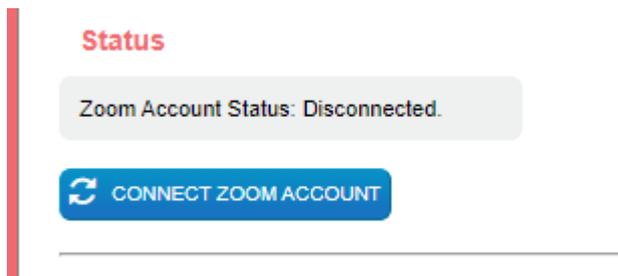


**Note:** If your site does not use a department configuration, ezyVet does not show the **For Division** box.

5. Select **SAVE**.



6. Select **CONNECT ZOOM ACCOUNT**.

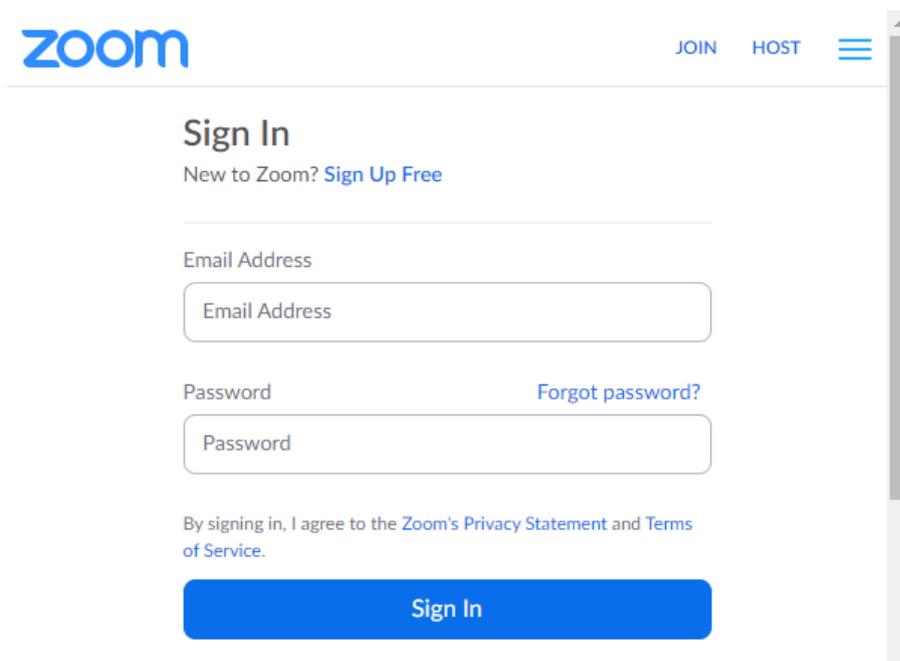


**Status**

Zoom Account Status: Disconnected.

 **CONNECT ZOOM ACCOUNT**

ezyVet shows a Zoom sign-in page in a new browser window:



**zoom** JOIN HOST 

## Sign In

New to Zoom? [Sign Up Free](#)

Email Address

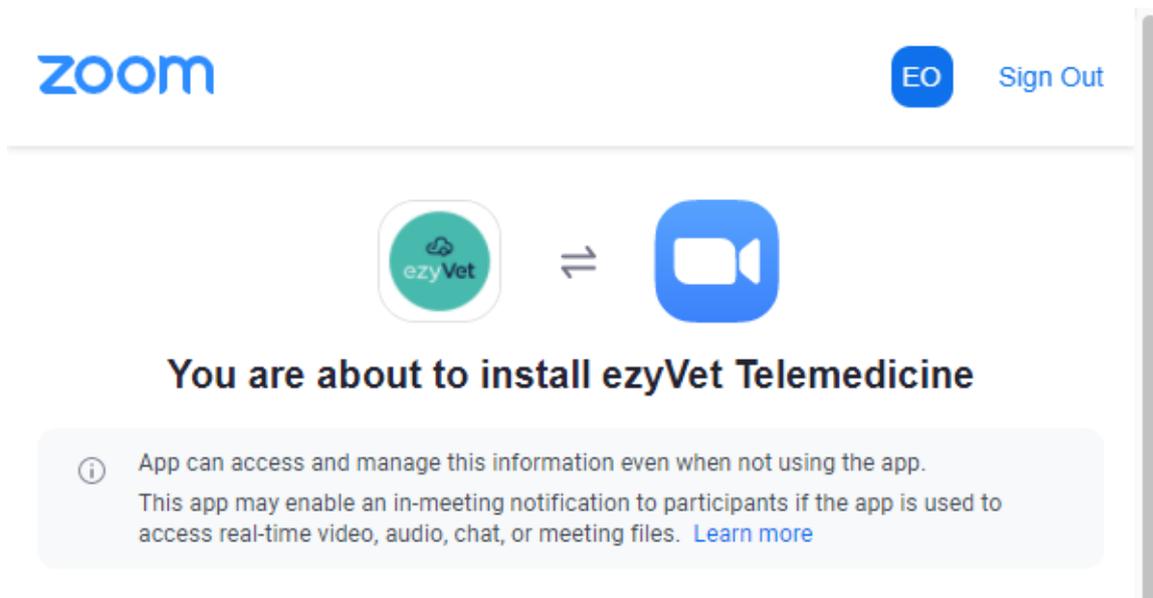
Password [Forgot password?](#)

By signing in, I agree to the [Zoom's Privacy Statement](#) and [Terms of Service](#).

**Sign In**

7. Enter your Zoom account username and password. Then select **Sign In**.

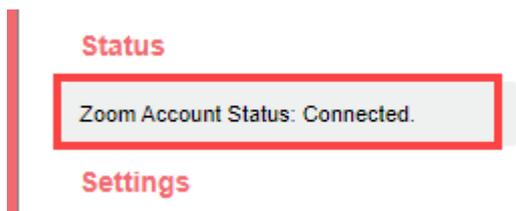
Your browser shows a window that tells you You are about to install ezyVet Telemedicine:



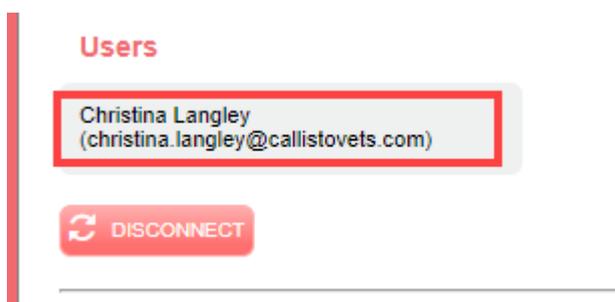
8. Do a check of the information in the window. Then select **Authorize**.



If your account username and password is correct, ezyVet shows Zoom Account Status: Connected:



ezyVet also shows the name of the connected Zoom account in the **Users** section:



9. In the **Settings** section, select the applicable **Default Password** setting.

## Settings

Default Password:  
 None  Animal Name  Contact Name

This table gives the function of each setting:

Setting	Function
None	ezyVet does not set a default password. Unless you manually set a password when you make an appointment, the call participant can connect without a password.
Animal Name	ezyVet uses the name of the patient of the appointment as the default call password.
Contact Name	ezyVet uses the name of the client of the appointment as the default call password.

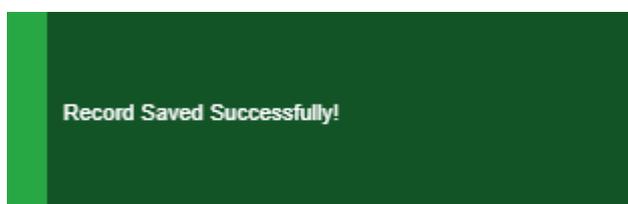


**Note:** The **Default Password** setting is applicable if you set the **Password required** setting of the virtual appointment configuration to **NO**.

10. Select **SAVE**.



ezyVet shows a confirmation message:



**Result:** ezyVet has a configured Zoom integration.

### Related information

[Recommended Zoom plan for virtual appointments \(on page 4\)](#)

### Related tasks

[Configure a Zoom virtual appointment type \(on page 17\)](#)