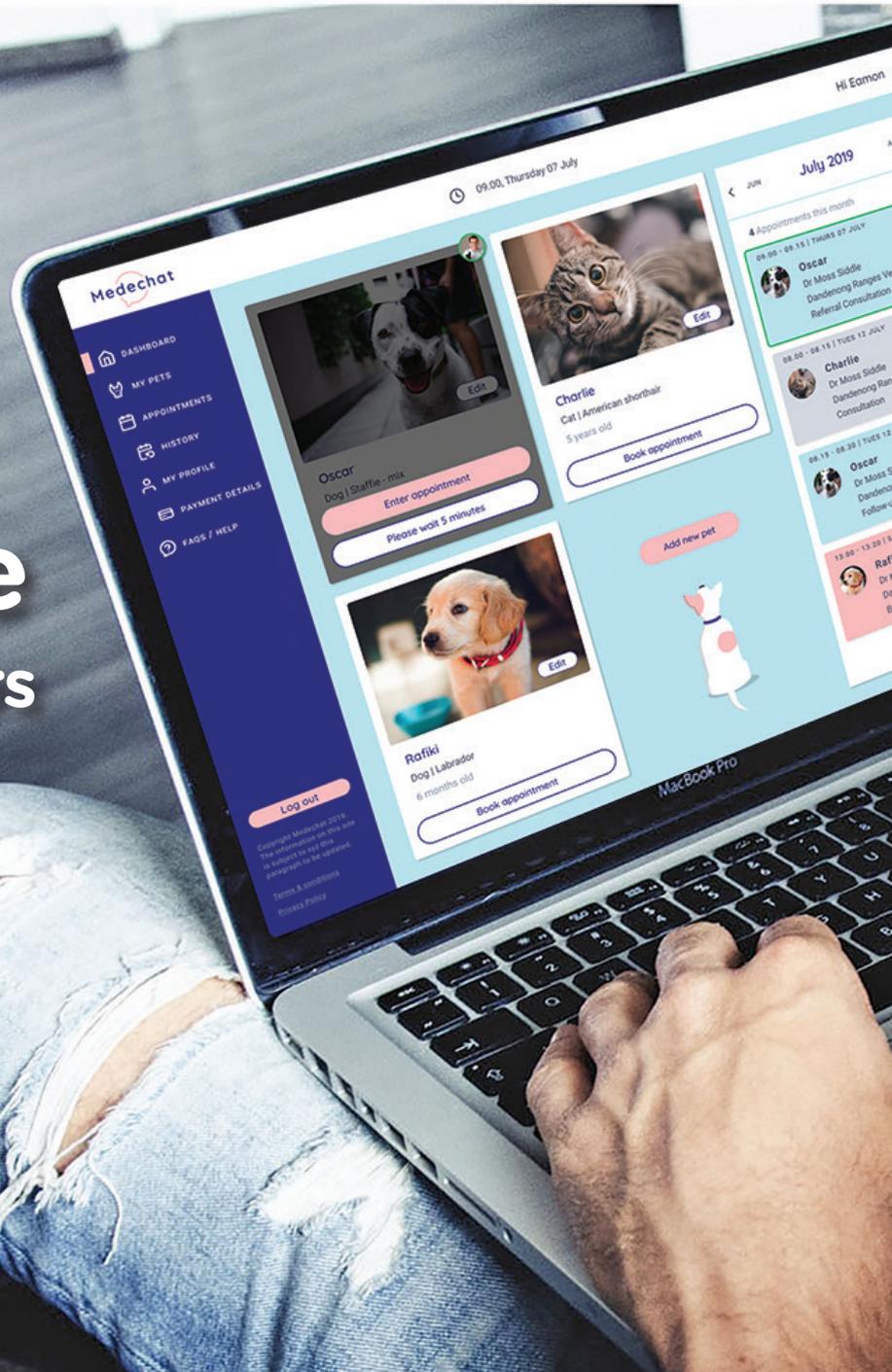


User Guide

Practice Managers



Medechat

**Veterinary Care
Anytime, Anywhere**

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Last updated 24 September 2020

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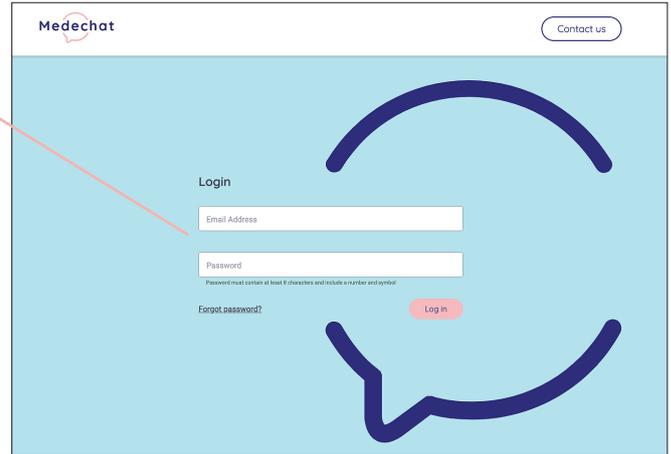
Welcome to Medechat

Login and Choose a Password

When you receive an email invitation to join Medechat, use the link and details provided to login to Medechat and choose a password.

You may wish to save this page to your bookmarks for future use or simply place a link on your own website for you, your vets and pet owners to access the Medechat platform.

There are several sections in Medechat that help you manage your vets, clients and your appointments. **Let's get started.**

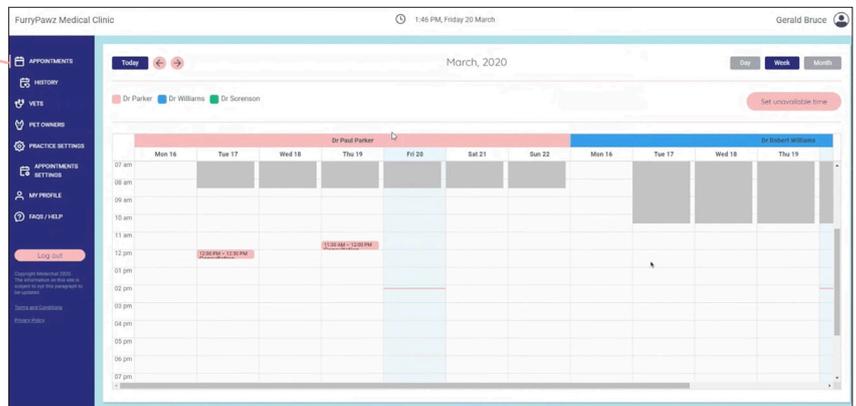


Default Landing Screen

When you login to Medechat you will be presented with your practices calendar of appointments.

Before you set up your practice and add your vets and pet owners, this screen will be blank.

Once populated it will look like this so **let's get you set up**



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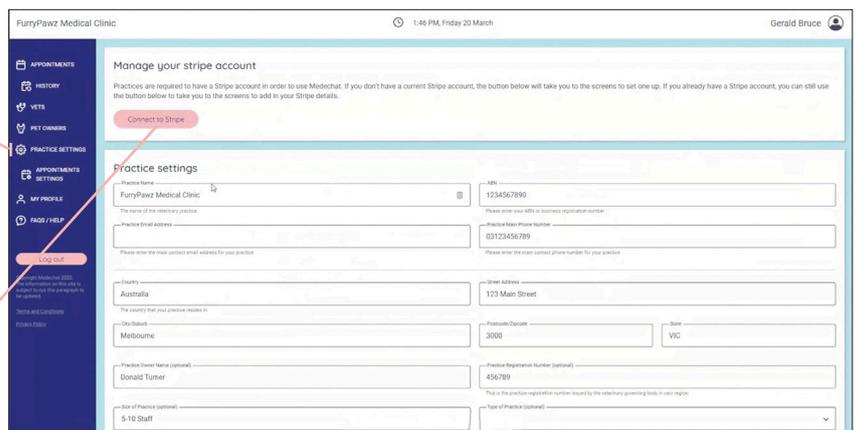
Practice Settings

Practice Settings

Here you can add all your practice business details.

You will need to set up a **Stripe** account (stripe.com/au) for your practice in order to receive credit card payments.

You can set this up using this tab and if you already have a Stripe account then you can **Connect** your Medechat account to your Stripe Account.



You have complete control over your Stripe account and can issue refunds, use it to bill pet owners for other products and services outside of Stripe and create financial reports. Stripe will deduct their merchant fees and commissions paid to Medechat from the pet owner payments, leaving the balance in your account.

Appointment Settings

Before your clients can book appointments you will need to setup your appointment types.

You will need to add your tax (GST/VAT/other tax) rate and the types of appointments that you will offer.

Select **Add new appointment type**

Appointment Types

There is a drop down list to choose from available appointment types. These are pre-determined for reporting purposes. Please try to use the pre-set appointment types to make reporting more accurate.

Choose the **Appointment Type** you wish to add.

Length & Cost

Add your preferred **length** of time for the appointment type and also the **cost** (excluding GST/VAT/other tax) you wish to allocate.

Don't forget to factor into the consultation charges the Medechat commission for each video consultation.

Remember to **Save changes** to add all your new appointment types to the platform.

Repeat the process for all the Appointment types that your practice will be offering it's clients via Medechat.

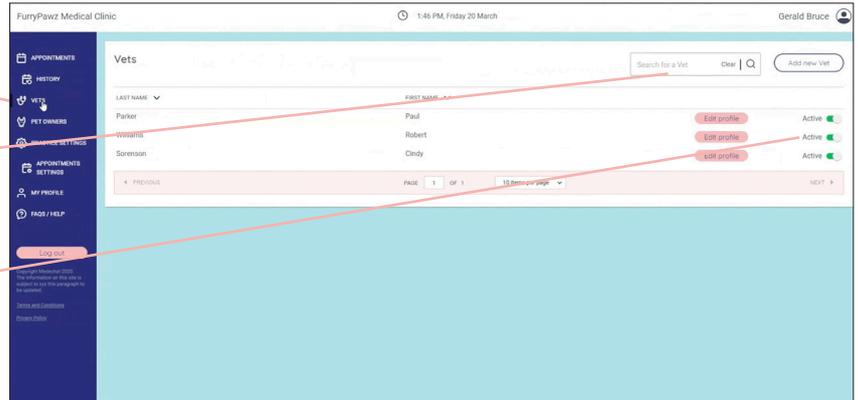
Please note:

If the video consultation runs longer than the set length of time allocated for the appointment type, a second consultation charge will be automatically billed to the pet owner. However, Vets can choose to over-ride the automatic charging.

Your Vets

The default screen is the list of your Vets. If you have a large number of vets, you can use the **Search** function to find a vet.

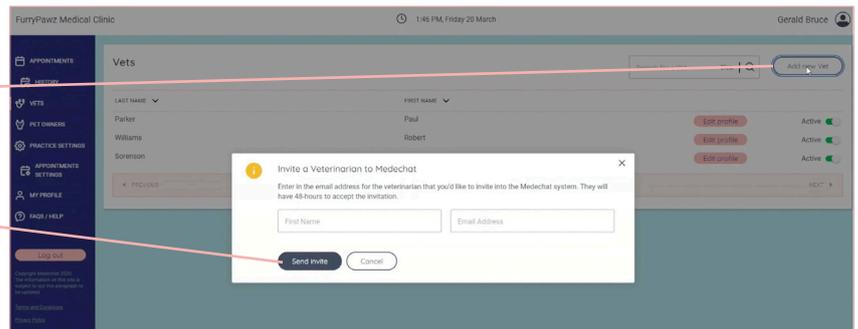
You can also easily toggle between your vets being **Active** and **Inactive** from this screen. This is useful if they take extended periods of leave and won't be available for appointments.



Adding a Vet

Select **Add new vet**

A pop-up will appear where you enter the vets name and email address. Then select **Send Invite**. This will send an invite to your vet with login details so they can join your practice in Medechat and create their profile.



Editing a Vets Profile

Once your vet accepts the email invitation they will appear in the list.

You can then **Edit profile** to add any details that the vet may not have.

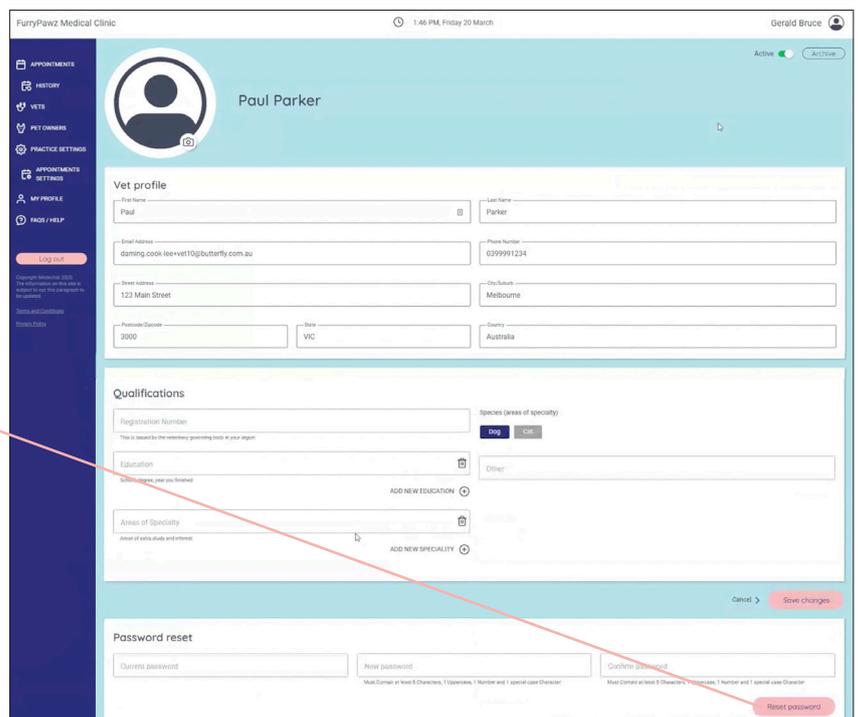
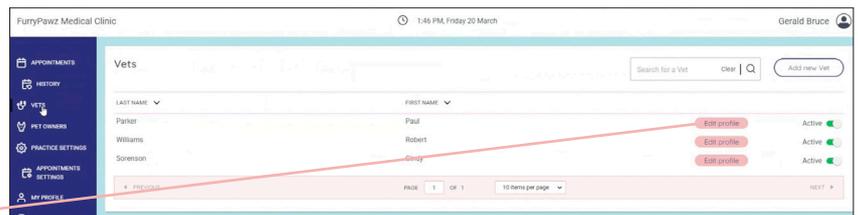
These are personal details about your vets and once entered, you shouldn't need to access these again.

Please note:

Your vets will have 7 days to accept your initial invitation before it expires.

You can resend an invitation to a vet via the **Reset Password** tab at the bottom of the particular vet's profile.

The vet will have 24 hours to reset their password after the invitation is sent.

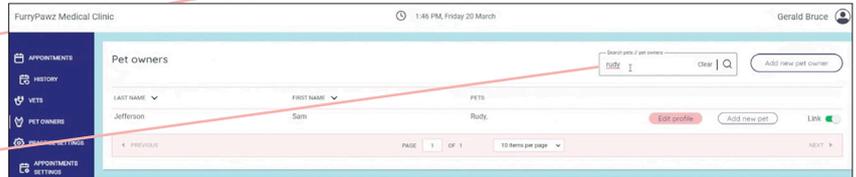
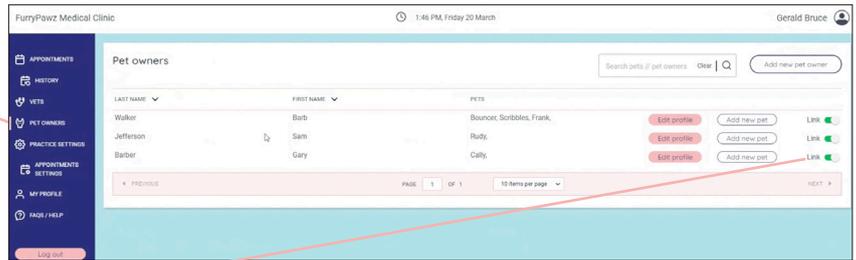


Your Pet Owners

The default screen is the list of your pet owners and pets. You can **Edit their profile** and **Add new pets** from this page.

You can also toggle between a client being **Linked** and **Unlinked** from your Medechat platform.

You can use the **Search** function to find a particular client using their name or their pets name.

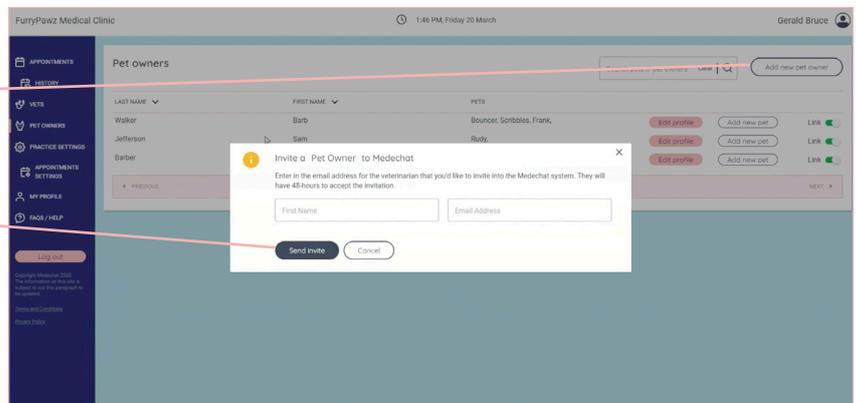


Adding a Pet Owner

Select **Add new pet owner**

A pop-up will appear where you enter the pet owners name and email address. Then select **Send Invite**

An email invite will be sent to the pet owner with login details so they can join your practice in Medechat and add their profile and pets.



Editing an Owners Profile

Once your client accepts the email invitation they will appear in the list.

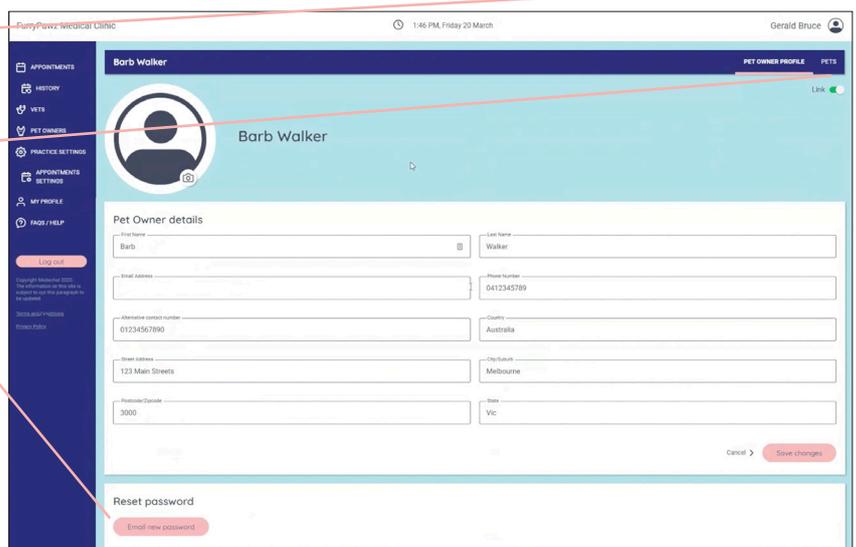
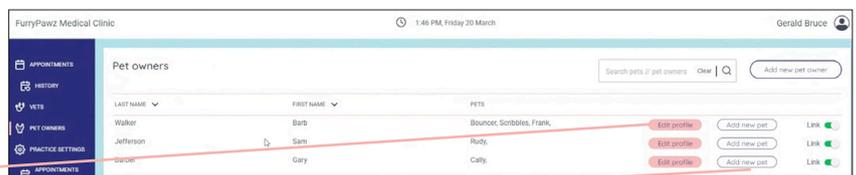
You can then **Edit profile** to add pet owner details. You can also **Add new pets** if the pet owner has not already.

To view the pets that belong to the pet owner, select **Pets** from the top menu bar.

Please note:

Your pet owners will have 7 days to accept your initial invitation before it expires. You can resend an invitation to via the **Reset Password** tab at the bottom of the owner's profile.

The vet will have 24 hours to reset their password after the invitation is sent. You can repeat the process every time an invitation expires.



6 Managing your Pets

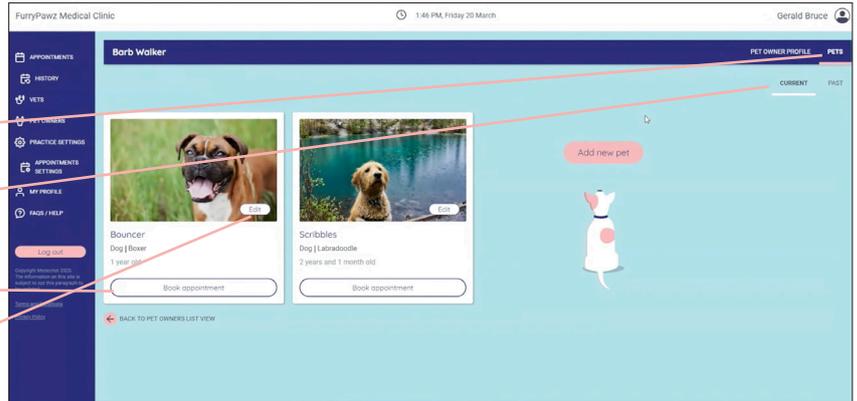
Your Pets

All pets are attached to their owners and can be viewed on the **Pets** page.

You can see both **Current** and **Past** pets belonging to the owner.

If you take a telephone booking you can also **Book an appointment** for that pet through this page.

To edit an existing pet, select **Edit**

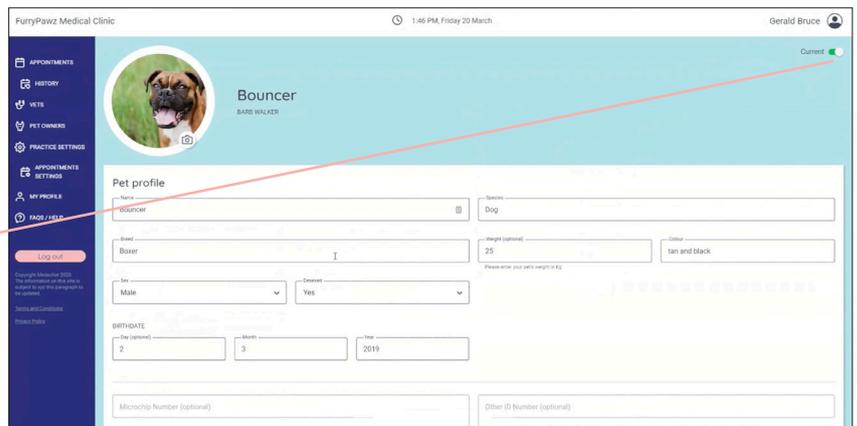


Editing Pets

Each pet has its own profile which can be entered or edited by the owner or the practice.

You can also toggle between a pet's status as being **Current** or **Past**

You would change their status if a pet has passed or has a new owner.

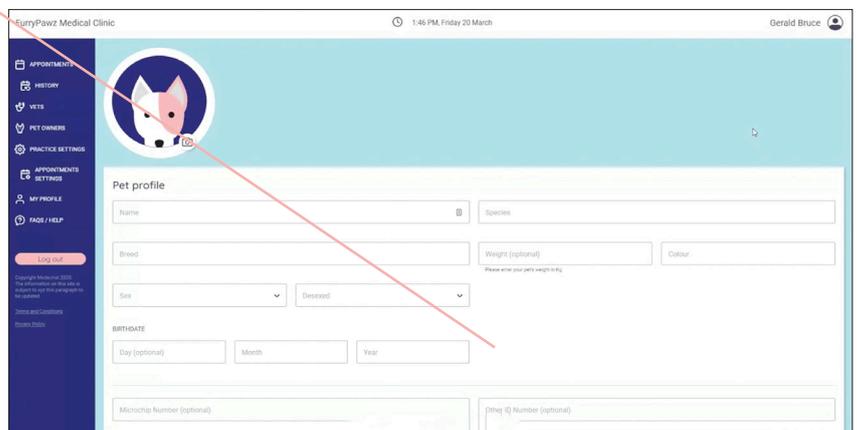
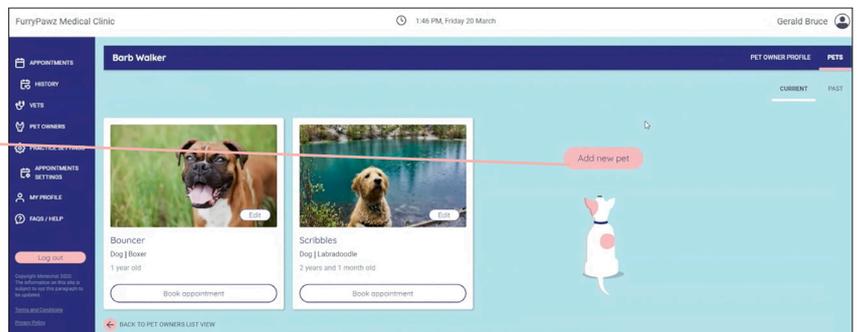


Adding a Pet

If you are adding a pet on behalf of the owner, select **Add new pet**

Enter the details about the pet into the pet profile to assist the vet when it comes to a consultation.

When **Saved**, this pet will be added to the owner's pets.

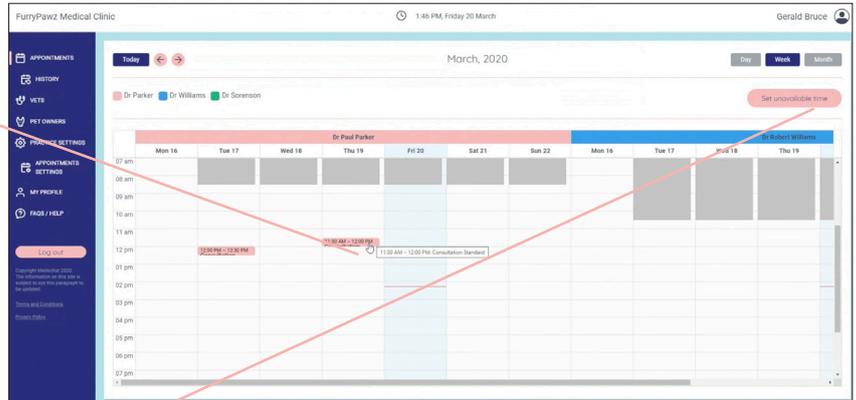
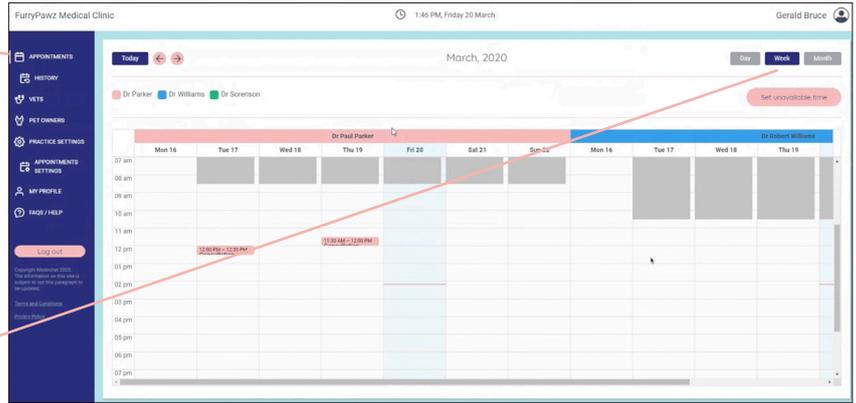


Appointments

When you login to Medechat you will be presented with your practices calendar of booked appointments. All vets with available appointment times will be shown.

The grey areas are the times that are not available for consultations. You can view appointments by a **day, week or month** view.

You can hover over the appointment to see the basic details.

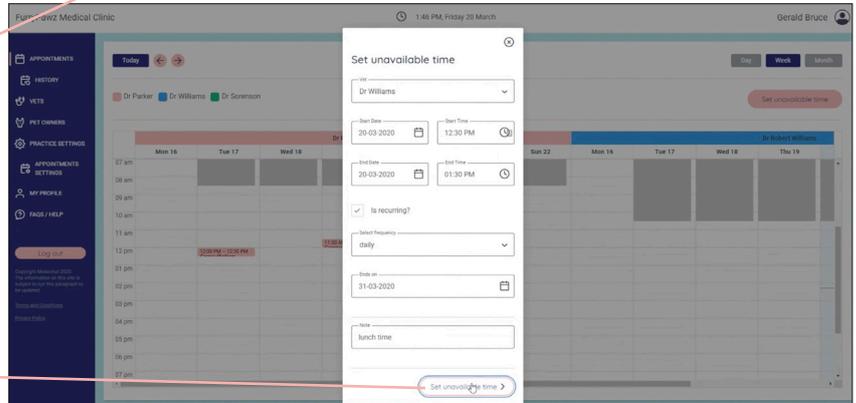


Set Available Times

Select **Set available time**

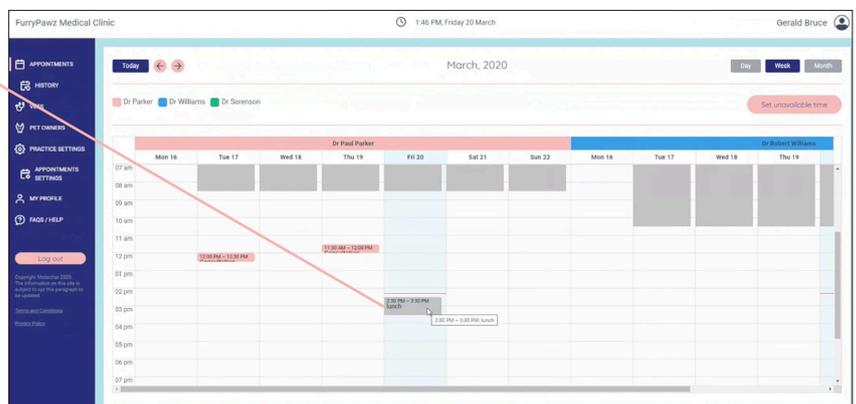
This is for setting times when your vet is available to take bookings and can be reoccurring.

Fill in the pop up and then select **Set available time**



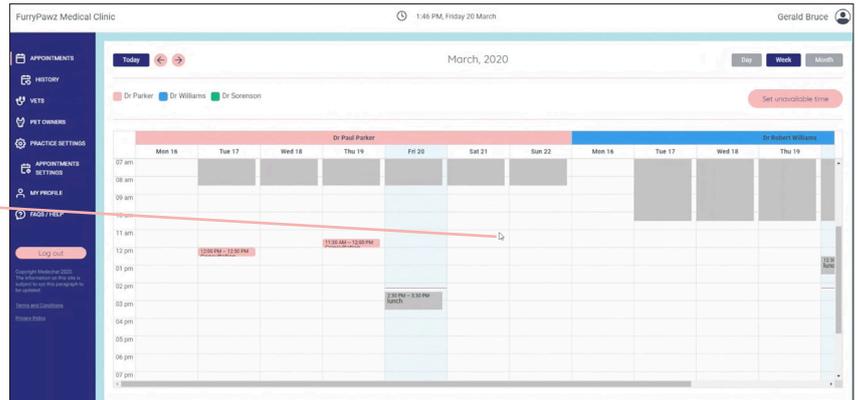
This will then show on the calendar as available in that timeslot.

Your vet will also have the ability to set themselves as unavailable.



Appointment Time

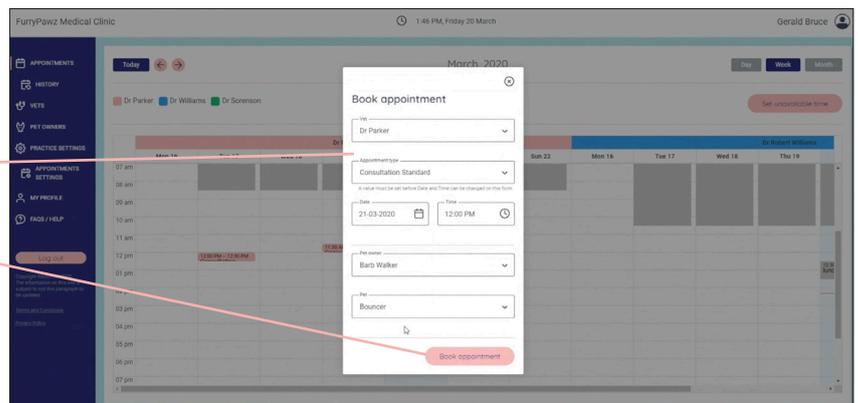
If making an appointment in person, over the phone or via email select the time you could like to make the appointment under the vet selected.



Appointment Details

Add the details of the appointment, selecting the **Appointment Type**, **Date**, **Time**, **Pet Owner** and **Pet**.

Select **Book appointment**



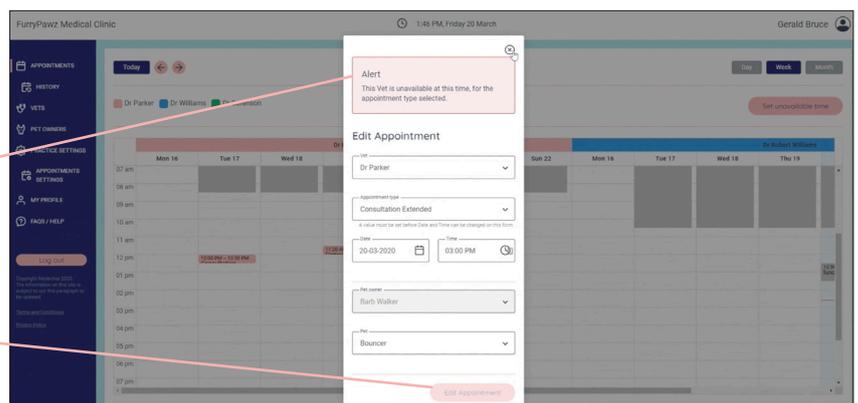
Please note:

If a pet owner selects an appointment type that is incorrect (for example a short revisit instead of standard consultation) you can edit the appointment by clicking on the appointment in the appointment calendar and changing the appointment type. You can also edit all other details of the appointment this way (vet, time, day, reason, etc). The consulting vet that the appointment has been booked with can also change the appointment type charged to the pet owner at the end of the video consultation at their discretion.

Appointment Clashes

If the **Appointment Type** chosen has a length that makes the booking clash with another booking, you will see this **Alert**.

You can then make the necessary changes to the **Time** or **Appointment Type** and select **Edit Appointment**



Appointment Confirmation

Both the vet and the pet owner will receive an appointment booking confirmation via e-mail and a text message within 15 minutes of the scheduled appointment