

ER Express & ezyVet Integration Guide

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Overview

ER Express is an online queuing, waitlist, intake and client communication tool designed to help busy veterinary EDs and Urgent Cares more efficiently manage prearrival client tasks and communications through the direct integration with ezyVet:

- Virtual Waiting - By combining ER Express’s mobile patient queuing and digital patient intake services into one cohesive experience, supporting urgent care clinics, animal health facilities, and emergency departments in creating a more positive and efficient experience for both patients and staff.
- Remote Check-In and Digital Patient Queuing - Our digital patient queuing tool (Walk-In Express) can automate wait time communication to free up your staff from actively managing patient expectations, but it also learns the patient throughput and accurately assigns treatment times.
- Digital Patient Intake - Digitize the intake process to promote convenience and efficiency for patients and staff. Allow patients to complete registration forms prior to their visit via highly customizable, user-friendly, mobile patient registration solution.

This includes specific functionality:

- Digital signatures
- Auto Text updates
- Custom screening questions

- Drop-off / pick-up messaging
- Real-time reports & analytics
- Acuity safeguard
- Reschedule, delay, & cancel options

<https://www.erexpress.com/>

Regions

USA

Glossary

ERX – ER Express

Intake Express © – Digital registration module offered through ER Express

Walk-In Express © – Digital queuing and virtual waiting module offered through ER Express

Check-In Express © - aka “Save My Spot”, this is online digital appointment module that offers specific timeslots for checking in.

Reservation Form – The online digital form used in ER Express that must be submitted in order for clients to enter the digital queue

Walk-In Form – The online form that customers will complete in order to submit a Reservation in ER Express. The Walk-In form has a specific URL that is typically accessible from the customer’s website via a button that can be labeled “Online Check-In”

Registration Form – When enabled and appropriate, this form will follow a completed Reservation form in the workflow

2. Integration in Action

The ER Express and ezyVet integrated workflow will allow for clients/pet owners to securely and efficiently check-in to the ER Express digital waiting queue with the added benefit of account/customer/patient verification in ezyVet.

The customer/account/pet verification process all takes place within the user friendly screens of the ER Express Reservation Form. While checking into ER Express, pet owners will be able to look up their existing information in ezyVet and confirm contact information plus pet information. Once the reservation in ER Express is submitted, information will cross over into the ezyVet Dashboard, create the ‘appointment’ on the calendar and generate a new clinical record.

Additionally the ER Express Registration Form will conveniently attach to the clinical record in ezyVet eliminating duplicate and manual front desk staff tasks. Lastly, there is no need to copy and paste any customer communication obtained in ER Express over to ezyVet. As a final step in the integrated workflow,

the customer SMS communication chain collected in ER Express will cross over to the Patient record in ezyVet upon conclusion of the visit in ER Express.

2.1 Initial setup

Your implementation coordinator will initiate the connection from your ezyVet site to your specific ER Express site. Once the two sites are connected, specific data sets from ezyVet such as Species, Breed, Sex, and Color options will populate the ER Express Reservation Form automatically. Additionally, Resources and appointment types will be downloaded into the admin configuration screens in ER Express.

Periodic checks will be made to ensure the information stays in sync between ER Express and ezyVet.

2.2 Create New Contact (Owner) and Animal (Pet)

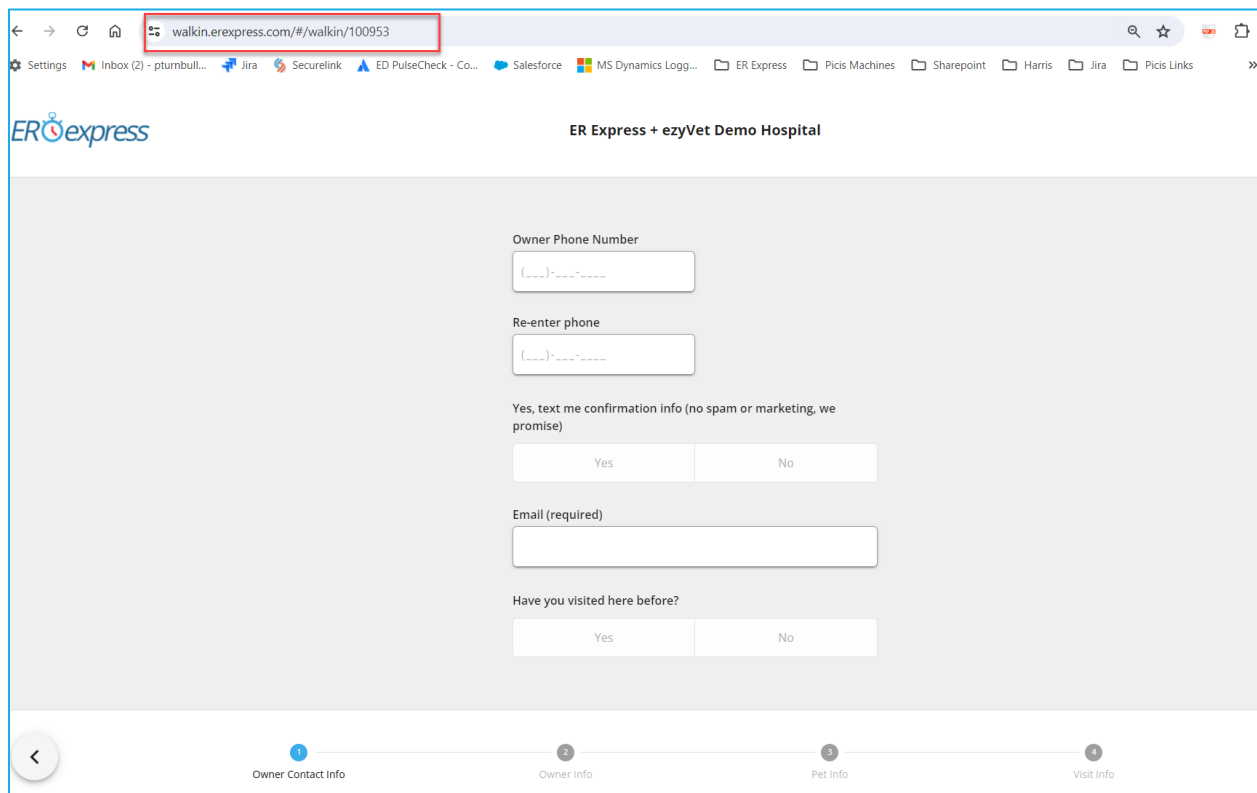
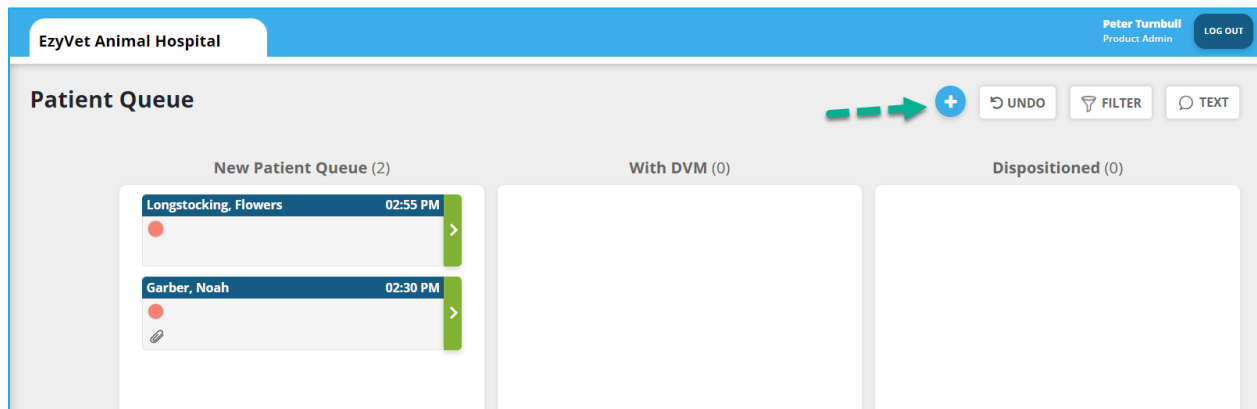
In ER Express, new customers can request to join the waiting queue by completing the reservation form online, called the “walk-in” form. This is usually accessible via a widget/button directly on customer website. If you do not know your walk-in form URL, please email help@erexpress.com to obtain it.

The screenshot shows a web browser window with the address bar containing the URL `walkin.erexpress.com/#/walkin/100953`. The page title is "ER Express + ezyVet Demo Hospital". The form contains the following fields and options:

- Owner Phone Number:
- Re-enter phone:
- Yes, text me confirmation info (no spam or marketing, we promise):
 -
 -
- Email (required):
- Have you visited here before?:
 -
 -

At the bottom, a progress indicator shows four steps: 1. Owner Contact Info, 2. Owner Info, 3. Pet Info, and 4. Visit Info. The first step is currently active.

Additionally, internal staff needing to create a new customer reservation can click the (+) to begin a new reservation on the patient queue page



- Complete the information on the first page for phone, email and answer 'no' to question 'Have you been here before?'
- Select the arrow to move to the next page.
- Complete the information on the second page for owner first and last name.
- Select the arrow to move to the next page.
- Complete the information on the third page for Pet name, species, breed, color, sex, approximate age.

Milford Urgent Care
Treatment Time 11:00 AM Thursday, May 23

?

[← Back to Pets list](#)

Pet Name

Pet species general

Pet breed

Pet color

Pet's Approximate Age

Pet Sex

✓ Owner Contact Info
 ✓ Owner Info
 3 Pet Info
 4 Visit Info
 >

- Select the arrow to move to the next page.
- Complete the information on the fourth page for reason for visit.

Milford Urgent Care
Treatment Time 8:25 AM Tuesday, May 21

?

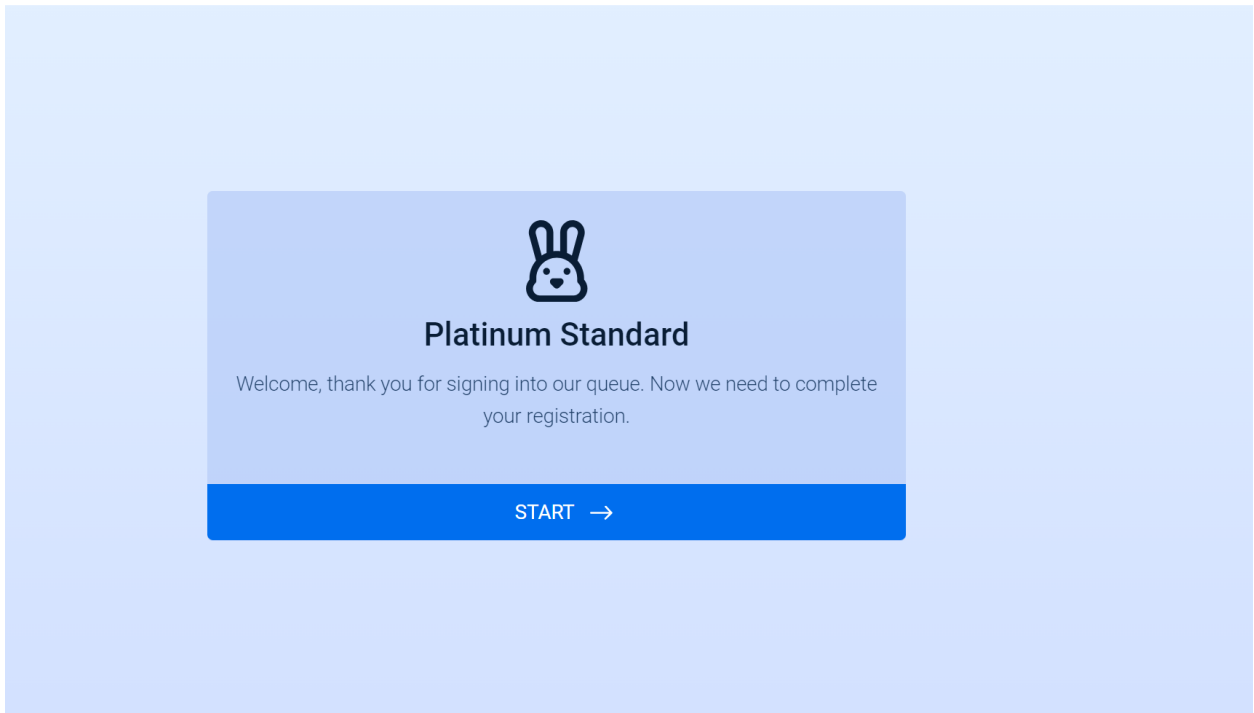
Visit Type
✓

Tell us what the problem is
✓

✓ Owner Contact Info
 ✓ Owner Info
 ✓ Pet Info
 4 Visit Info
 Sign in

- Select the “sign-in” button to add the reservation.

- Next you will be taken to the Registration form.



- Complete the form, sign and submit.
- On completion
 - The Owner (Contact) record will be created in ezyVet including the address entered in the Registration.
 - The patient (Pet) information will be added to ezyVet including the veterinary information if defined in a dropdown
 - An appointment will be added to the base calendar and will include the 'reason for visit'
 - A clinical record will be added including a PDF attachment of the Registration

2.3 Returning Owner with New Pet

- Complete the information on the first page for phone, email and answer 'YES' to question 'Have you been here before?' Select your name from the owner drop down.

Milford Urgent Care
Treatment Time 11:00 AM Thursday, May 23

?

Owner Phone Number

Re-enter phone

Yes, I would love to be notified by text all the time
 Yes No

Message frequency varies depending on activity. Message and data rates may apply. Reply "HELP" for help and "STOP" to stop getting messages.

Email (optional)

Have you visited here before?
 Yes No

Owner Details

- Pepe Longstocking

1 — 2 — 3 — 4

Owner Contact info Owner info Pet info Visit info

>

- Select the arrow to move to the next page.
- Review the information on the second page for owner first and last name.

Milford Urgent Care
Treatment Time 8:25 AM Tuesday, May 21

?

First name

Last name

✓ 1 — 2 — 3 — 4

Owner Contact info Owner info Pet info Visit info

>

- Select the arrow to move to the next page.
- On the third page - for a new pet select the (+) plus sign.



Pets

Either choose or add your pet

Owner Contact Info Owner Info Pet Info Visit Info



- Complete the information on the third page for Pet name, species, breed, color, sex, approximate age.



[-< Back to Pets list](#)

Pet Name

Pet species general

Pet breed

Pet color

Pet's Approximate Age

Pet Sex

Owner Contact Info Owner Info Pet Info Visit Info



- Select the arrow to move to the next page.
- Complete the information on the fourth page for reason for visit

- Select the submit button to add the reservation.
- Next you will be taken to the Registration form.
- Complete the form, sign and submit.
- On completion
 - The patient (Pet) information will be added to ezyVet including the veterinary information if defined in a dropdown
 - An appointment will be added to the base calendar and will include the ‘reason for visit’
 - A clinical record will be added including a PDF attachment of the Registration

2.4 Returning Owner and Returning Pet

- Complete the information on the first page for phone, email and answer ‘YES’ to question ‘Have you been here before?’ Select your name from the owner drop down.

Milford Urgent Care
Treatment Time 11:00 AM Thursday, May 23

?

Owner Phone Number

Re-enter phone

Yes, I would love to be notified by text all the time

Yes No

Message frequency varies depending on activity. Message and data rates may apply. Reply "HELP" for help and "STOP" to stop getting messages.

Email (optional)

Have you visited here before?

Yes No

Owner Details

Choose an item

Pepe Longstocking

1 Owner Contact info
2 Owner Info
3 Pet Info
4 Visit Info
>

- Select the arrow to move to the next page.
- Review the information on the second page for owner first and last name.
- Select the arrow to move to the next page.
- On the third page – select the pet from the dropdown list.



Pets

Either choose or add your pet

- Shiva
- Pepperoni
- Smooches

Owner Contact Info ✓ Owner Info ✓ Pet Info 3 Visit Info 4

- Review the information on the third page for Pet name, species, breed, color, sex, approximate age.



Pet Name

✓ Felix

Pet species general

✓ Feline (Cat)

Pet breed

✓ Himalayan

Pet color

✓ Black & Brown

Pet's Approximate Age

✓ 01/01/2020

Pet Sex

✓ Male Neutered

Owner Contact Info ✓ Owner Info ✓ Pet Info 3 Visit Info 4

- Select the arrow to move to the next page.
- Complete the information on the fourth page for reason for visit.



Visit Type
✓ Emergency

Tell us what the problem is
✓ not eating

Owner Contact Info ✓ Owner info ✓ Pet info 4 Visit info

Sign in

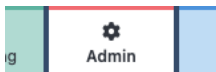
- Select the submit button to add the reservation.
- Next you will be taken to the Registration form.
- Complete the form, sign and submit.
- On completion
 - An appointment will be added to the base calendar and will include the 'reason for visit'
 - A clinical record will be added including a PDF attachment of the Registration

3. How to Configure (in ezyVet)

3.1 Get ezyVet Partner API Credentials

The following outlines the steps required to get your ezyVet Partner API credentials.

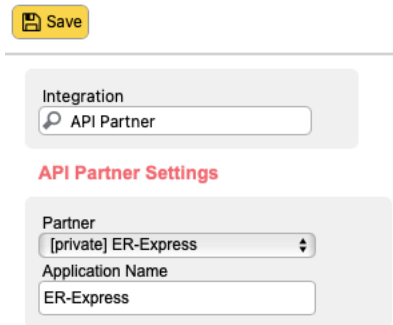
- Log into ezyVet with relevant admin privileges
- Click on the 'Admin' tab



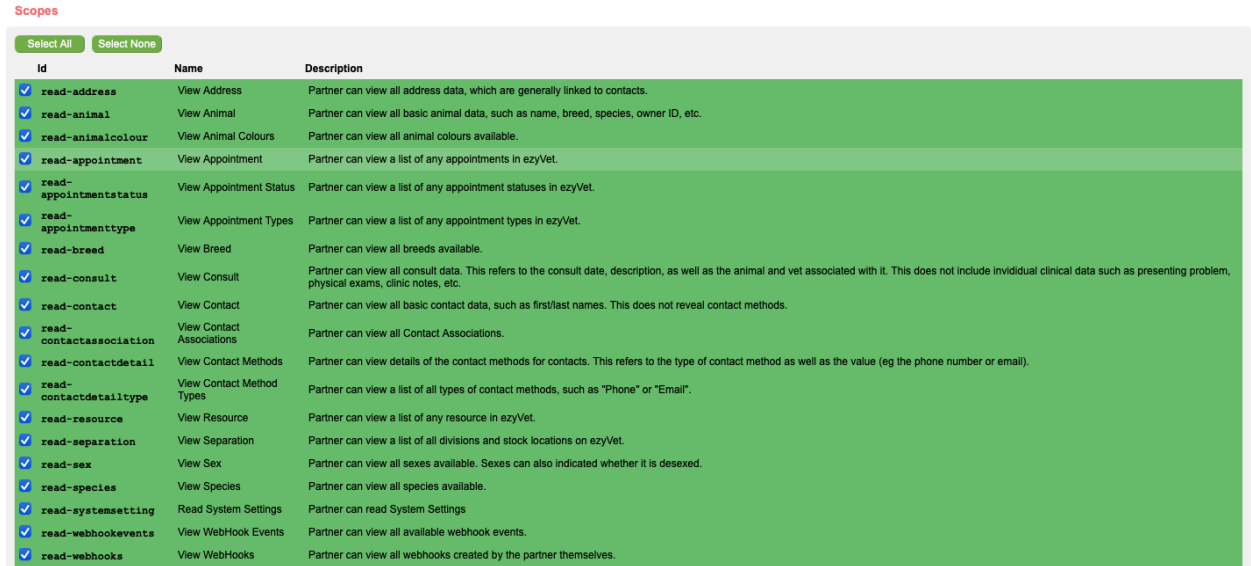
- Use the drop-down box on the left of the screen and select Integration



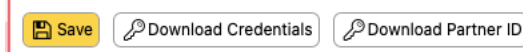
- In the Integration Search Box type and select “API Partner”
- Select ‘ER Express’ from the Partner drop down box and then click ‘Save’



- Underneath ‘Scopes’ click ‘Select All’ and then Click ‘Save’



- Click ‘Download Credentials’. Your browser will then download a file named credentialsapi.txt.



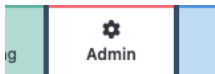
3.2 Send Credentials to ER Express

Email **downloaded txt file** to help@erexpress.com with the **subject:** ezyVet API file

3.3 Disable Integration in ezyVet

If you no longer wish to use the integration, it can be disabled by following the below instructions.

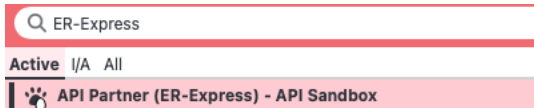
- Log into ezyVet with relevant admin privileges
- Click on the 'Admin' tab



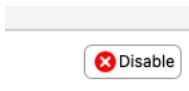
- Use the drop-down box on the left of the screen and select Integration



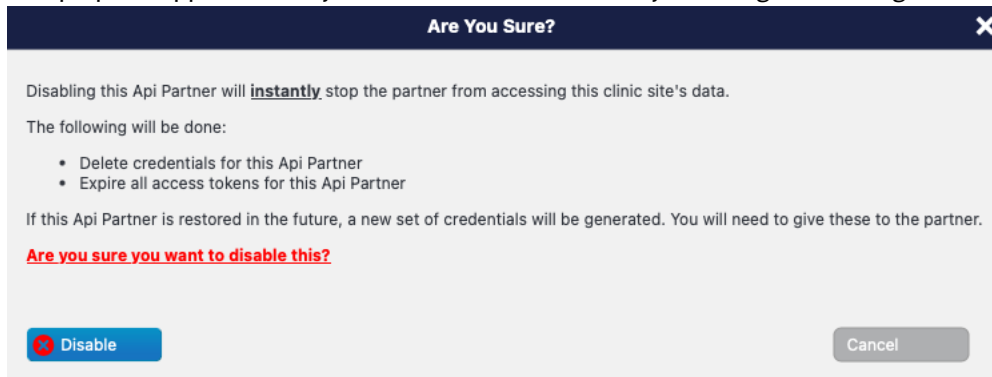
- Use the search bar on the left-hand side of the screen to search for the integration



- Select the integration and look on the right-hand side of the screen for the DISABLE button
- Select DISABLE



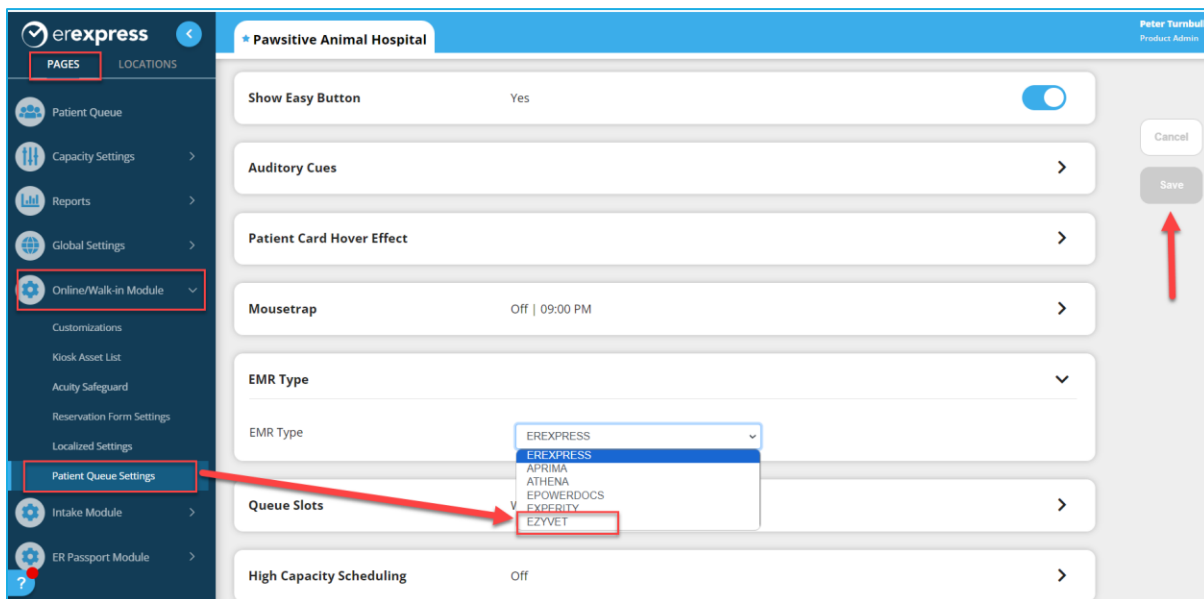
- A Pop-up will appear where you can confirm the disable by selecting DISABLE again



4. Configuring ER Express for ezyVet

4.1 Step 1 – Set EMR Type

As an admin, go to **Online Walkin Module->Patient Queue Settings->EMR Type-> Set it to ezyVet. Click 'Save'**

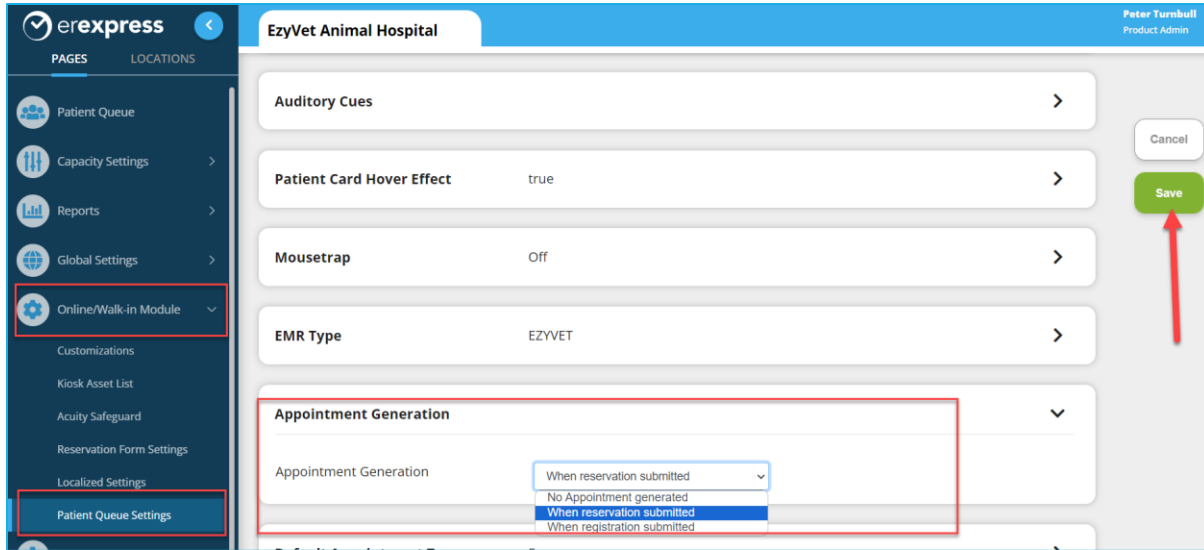


Step 2

Determine which trigger event in ER Express is preferred to generate the 'Appointment' in Ezyvet. There are two options:

- 1) Upon **Reservation Form** Submit
- 2) Upon **Registration (jotform pdf)** submit.

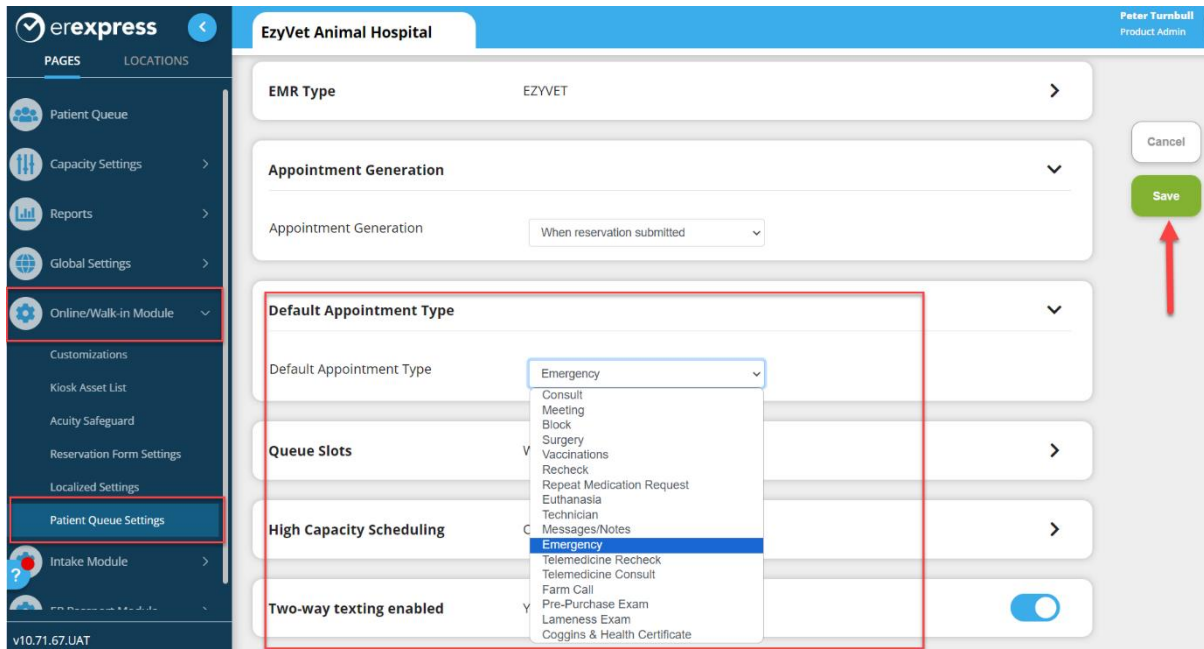
Then, set the trigger preference in ER Express. **Online Walkin Module->Patient Queue Settings->Appointment Generation->Set it -> Click 'Save'**



Step 3

Determine which 'default appointment type' ER Express should generate in ezyVet. The list of options in ER Express should match the default list in ezyVet.

Then, set the appointment type in ER Express. **Online Walkin Module->Patient Queue Settings->Default Appointment Type->Set it -> Click 'Save'**



4.2 Reservation Form Settings in ER Express

Ensure that your reservation form settings are configured as follows:

Online/Walkin Module->Reservation Form Settings

Email Field:

- ✓ Walkin Form: “Show” and “Required”

Visited Before:

- ✓ “Show”

DOB Input Fields:

- ✓ “Off”

Ask For Pet Name

- ✓ Walkin Form: “Show”

Ask For Pet Species General

- ✓ Walkin Form: “Show”

Ask For Pet Color

- ✓ Walkin Form: “Show”

Ask For Pet Sex

- ✓ Walkin Form: “Show”

Ask For Pet Breed

- ✓ Walkin Form: “Show”

Pet Age Input Type

- ✓ “Calendar Date”

Note: If you are using the ER Express Registration (Intake) form and want the client to be automatically taken to it after completing the Reservation Form, make sure **Embedded Intake Form** is set as shown below

4.3 Additional Steps Needed for Set Up:

- 1) In ezyVet, determine which default “**resource**” you want the ER Express Appointment created on. Please let ER Express implementation lead know what that **resource id** is. (see below)

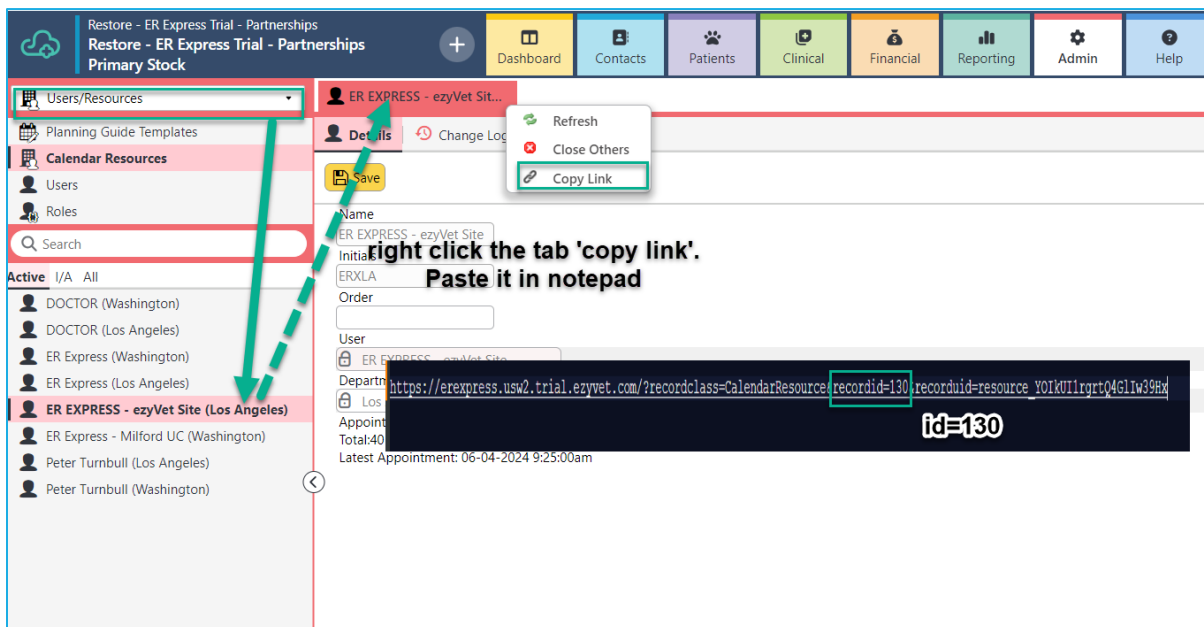
To find the resource ID for your default calendar in ezyVet.

Go to: Admin->select 'Users/Resources' from dropdown. Click 'calendar resources.' Then from the list below, click the resource you want as the default resource.

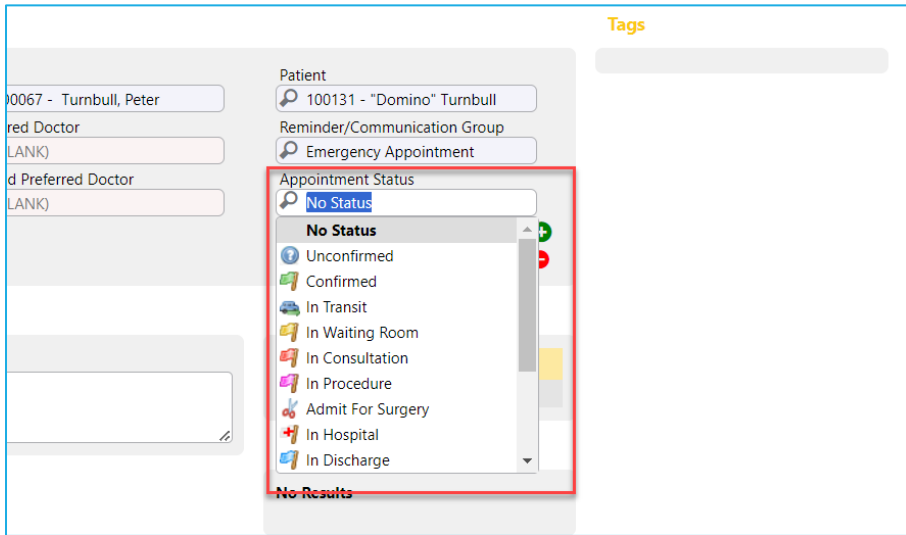
In the window on the right, 'right click' the top tab-> 'copy link.'

Paste the value into notepad or a blank document. Resource id is found in the URL string such as below: In this example it is 130.

```
https://erexpress.usw2.trial.ezyvet.com/?recordclass=CalendarResource&recordid=130&recorduid=resource_2PHmpssq2RvwXOL5loFm7
```



- 2) In ezyVet determine if you want a default appointment 'status' to be set when ER Express creates the appointment. If you don't set one, a 'No Status' value will be set. (see below)



5. Troubleshooting

<https://erexpress.zendesk.com/hc/en-us/categories/4403955763223-Application-Overview-for-Super-Users>

6. Technical Support

- Please email help@erexpress.com for any technical issues
- <https://erexpress.zendesk.com/hc/en-us/requests/new>