How AI Works

A step-by-step guide to using Vet Assistant AI™

INTRODUCTION

Vet Assistant AI™, is an easy-to-use but sophisticated AI bot developed by veterinarians and veterinary nurses that can ask interactive questions (via call or text/SMS) to ensure animal companions have the best care. Vet Assistant AI™ helps your practice find out how your patients are doing post-visit, remind clients of appointments, provide the right patient medication monitoring, and so much more without manual, time-consuming follow-ups. Specific client responses can automatically trigger different actions including giving additional information like emailing your client handouts. This lets the whole practice better focus on providing care to those who need it right away. Veterinarians can be confident that all of their patients are receiving follow up every time that precisely aligns with their preferred approach. If a patient needs additional care, then the contact is automatically flagged, and if desired, clients can be directed to contact veterinary staff to schedule in-person appointments. The following guides the user when using this powerful practice tool.

GET STARTED

Go to **vetassistant.ai** and create a log in.

Go to **Settings**, enter practice information, and set preferred contact time range under **Contact Time Range**.

Select your preferred **AI Settings**, name *(we suggest something easy to hear and say so nothing too long or uncommon)*, speaking speed, and default max number of contact attempts.

CONTACTS

Add new contact

Go to **Contacts**, click **Add New Contact**, and enter patient name, vet name, client first and last name, client's email and phone number and select the client's preferred contact method. **Do not select "Text/SMS" if the client cannot receive texts at the entered phone number*. Click **Save Changes**.

Edit contact information

2021-2022 © Copyright Vet Assistant AI, Inc. All rights reserved. “Contact Flow” and “Vet Assistant AI” are trademarks of Vet Assistant AI, Inc. Ver. 31MAR2022

Click the **Pencil** icon on the desired contact then choose **Edit**. After changes have been made click **Save Changes**. To delete a contact, click the **X**. To move an Active contact to a status of Past, click the **Move** icon. You can filter all contacts by Active or Past, No Response, AI Contacting, Staff Call Needed, or by using the search bar to enter the patient or client information.

CONTACT FLOW®

Create your own

Go to the **Contact Flow®** page, click **Create New Flow**. Enter flow name, flow default repeat limit *(how many times the bot will try to understand an answer before switching to SMS/text)*, upload any documents you wish to email the client as part of the Contact Flow® and click **Save**. **If this flow will be used as a reminder call or text for a specific date/time, check the box stating this is a* ***scheduled event notification*** *Contact Flow*®. Click **Edit Flow Questions/Statements** to create your desired flow. Enter text in each Question/Statement box and **Save** or **Save & Collapse**. Once all questions/statements have been entered and saved, then enter all possible answers, desired actions, and destination boxes for each question/statement. Once complete, click **Save & Publish**. **You also have the option to Finish Later and Preview your Contact Flow®. **A flow will not be available for calls/texts/contacts until it has been published.*

Personalize

[Client Name], [Pet Name], [AI Name], [Practice Name], [Vet Phone Number], and many other fields will be dynamically filled in with the corresponding information you have entered under **Settings** and each individual **Contact**. Be sure to use the brackets "[" and "]" around the words/phrases like shown above to have the desired information automatically inserted when the AI bot speaks or texts.

Copy a Contact Flow®

You can also create your own Contact Flow® by making a copy of the default **Basic Template** flow. To copy, go to **Contact Flow®**, use the **Search Bar** to find the **Basic Template**, click the **Copy** icon. Enter your own flow name, and preferred flow default repeat limit and click **Save**. Then click **Edit Flow Question/Statements** to create your own flow without starting from scratch. When complete click **Save & Publish** OR **Finish Later** to save as a draft.

2021-2022 © Copyright Vet Assistant AI, Inc. All rights reserved. “Contact Flow” and “Vet Assistant AI” are trademarks of Vet Assistant AI, Inc. Ver. 31MAR2022

Edit or customize default flows

Go to **Contact Flow®**, use the **Search Bar** to find the flow you wish to edit or customize. Click the **Copy** icon on the desired flow, enter your own flow name, flow default repeat limit, and click **Save**. Click **Edit Flow Questions/Statements** to make your changes. Once completed, click **Save & Publish** or **Finish Later** to save as a draft.

End a call (or text)

For closing statements associated with End Call & Say Bye, Trigger Live Call Back, Contact Later, and Restart Flow, add these to the action box and your closing statement to the destination box. For example, if the question/statement is "Would you like to schedule a follow up exam with your veterinarian?" The answer could be "No" with an action "End Call & Say Bye." The destination statement could be entered as "Okay, I understand. Thank you, and have a great day".

Advanced actions

Advanced actions on individual questions/statements are *optional*. Use an advanced action to send an email or start another flow. To add an advanced action, click **Advanced actions** on the desired question/statement. Click **Add New Advanced Action**, and then select the Question/Statement and answer associated with the advanced action (**If**). Then select the action and destination of the advanced action (**Then**). **Here is where you can select files to be emailed to the client or start another flow.*

SCHEDULE CALLS/TEXTS

To schedule a follow up call (or text)

Go to **Contacts**, click the **Pencil** icon on the desired contact, and click **Start New Flow**. Select the flow name and start date & time. The max number of contact attempts is defaulted from your AI settings but you can choose to override that here, then select time between contact attempts (in minutes or hours). In the event that a call is disconnected before a Contact Flow® is completed, this is the time the bot will wait before trying to contact the client again. Click **Save** and your follow up call has been scheduled.

To schedule a reminder call (or text)

Go to **Contacts**, click the **Pencil** icon on the desired contact, and click **Start New Flow**. Select the flow name, scheduled event date & time, and start contact timing options. The max number of contact attempts is defaulted from your AI settings, but you can choose to override that here, then select the time between

2021-2022 © Copyright Vet Assistant AI, Inc. All rights reserved. “Contact Flow” and “Vet Assistant AI” are trademarks of Vet Assistant AI, Inc. Ver. 31MAR2022

contact attempts (in minutes or hours). In the event that a call is disconnected before a Contact Flow® is completed, this is the time the bot will wait before trying to contact the client again. Click **Save** and your reminder call has been scheduled. **Be sure to include the [Event Date] and [Event Time] in the Contact Flow questions/statement text to have the AI bot say the date and time for that specific contact.*

CALL STATUS

Status bar

Once a Contact Flow® has been scheduled a status bar will appear. Here is where it will list the status and action to be taken, if scheduled, or action taken if the contact has been completed.

Cancel a scheduled call (or text)

Click **Stop Contact Flow** or click **Edit** on the status bar and select **End Flow** then click **Save Changes**.

Automatic log

A log or transcript appears under the status bar after a call or text session has been completed. This log is automatically emailed to the client's email address that was entered under the contact patient information, and to your practice's email address that is entered under Practice Info in Settings. To email the log again, click **Email Log Again** under the status bar. **Clicking email again will only email the log/transcript to the practice email again, not the client's. **Check spam/junk/all email folders (and whitelist the @cloudassist.ai and @vetassistant.ai domains to prevent filtering) if the email is not received.*

AI contacting

The call or text is scheduled, and the AI will be contacting the client.

Follow up not taken

There was a system error or call/text that was scheduled for a time in the past.

Ended

The follow up call has been completed and no action is required. You may download, email, or copy and paste the report to your existing digital patient record.

2021-2022 © Copyright Vet Assistant AI, Inc. All rights reserved. “Contact Flow” and “Vet Assistant AI” are trademarks of Vet Assistant AI, Inc. Ver. 31MAR2022

No response

No response is recorded when the client is unable to be reached.

Staff notes

Add staff notes under the status bar, below the automatic log. **Enter** notes in the text box and click **Save**.

DASHBOARD

Status

See the status of all your current contacts in one place. Click **Staff Call Needed** to filter all contacts that need call backs based on clients' answers or any system error. Click **AI Contacting** to filter all contacts that still have follow up calls pending. Click **All Active Contacts** to see a list of all your active contacts. Click **All Past Contacts** to see a list of all your contacts that are no longer active. To change a contact status, from Active to Past, or Past to Active, click the **Move** icon next to the pencil and **X** icons. **A confirmation message will appear stating "Moving this contact will change the status from Active to Past and will cancel any scheduled or incomplete Contact Flows. Are you sure you want to do this?".* Click **OK** to move the desired contact.

Flows

The dashboard has a flow shortcut, click **Available Flows** to view or make copies of any default Contact Flow®. Click **Custom Flows** to view, copy, edit, or delete any of your own flows that you have created.

PDF files

Click **Upload File** under handouts/documents to upload PDF files for client handouts or education. Select desired file(s) to upload and these can be emailed automatically to your clients by editing the Contact Flow® actions. Go to **Contact Flow®**, click the **Pencil** icon to edit desired flow. If the flow you wish to edit does not have a pencil icon, click the **Copy** icon and this will enable you to edit the flow. Under **Documents** choose from Available/Uploaded File or Upload New File. Then click **Edit Flow Questions/Statements** and determine which question/statement you would like to associate with the document. Select **Action**, **Email, End Call & Say Bye**, and choose your desired file in the destination field. You may also send an email using advanced actions. Click **Save & Publish** once all changes are complete or **Finish Later** to save as a draft.

2021-2022 © Copyright Vet Assistant AI, Inc. All rights reserved. "Contact Flow" and "Vet Assistant AI" are trademarks of Vet Assistant AI, Inc. Ver. 31MAR2022

SUPPORT

Support

Click **Support**, fill out your name, e-mail, and question(s) and click **Submit**.

FAQs

Find a link to frequently asked questions (FAQs) at the bottom of the page in the footer. Use the **Search Bar** to help find your answers faster by looking for keywords. **Be sure to scroll down to see search matches/results as search matches can be very fast and the page may not obviously reload.*

2021-2022 © Copyright Vet Assistant AI, Inc. All rights reserved. “Contact Flow” and “Vet Assistant AI” are trademarks of Vet Assistant AI, Inc. Ver. 31MAR2022