

# Guide to Creating and Managing Your Own Patient File with the Practitioner Software

## Table of Contents

Creating Your Own Patient Files - Step-by-Step Guide .....	2
Practitioner Software - Step-by-Step Guide .....	4
Viewing Shared Patient Files - Step-by-Step Guide .....	6
Generating OKAPI Vouchers in the Practitioner Software (for your customers or personal use)...	7

# Creating Your Own Patient Files - Step-by-Step Guide

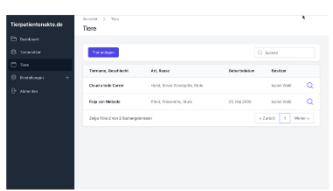
## 1. Create Login:



SANOANIMAL.COM

### Animal Data and Documentation

Have the data of your four-legged patients at hand at any time. Whether on your PC, tablet or smartphone.



**Manage Animals**  
Manage your four-legged patients and their associated treatments.

**Manage Owners**  
Manage owners and their animals. This gives you all the data at a glance.

**Document Treatments**  
Document the treatments of your four-legged patients.

**Manage Documents**  
Store various files such as PDF, JPG or PNG with your documentation.

**Send Questionnaires**  
Send anamnesis questionnaires to animal owners to collect patient data

**Create Feeding Plans**  
Create feeding plans with various feeds and feeding intervals.

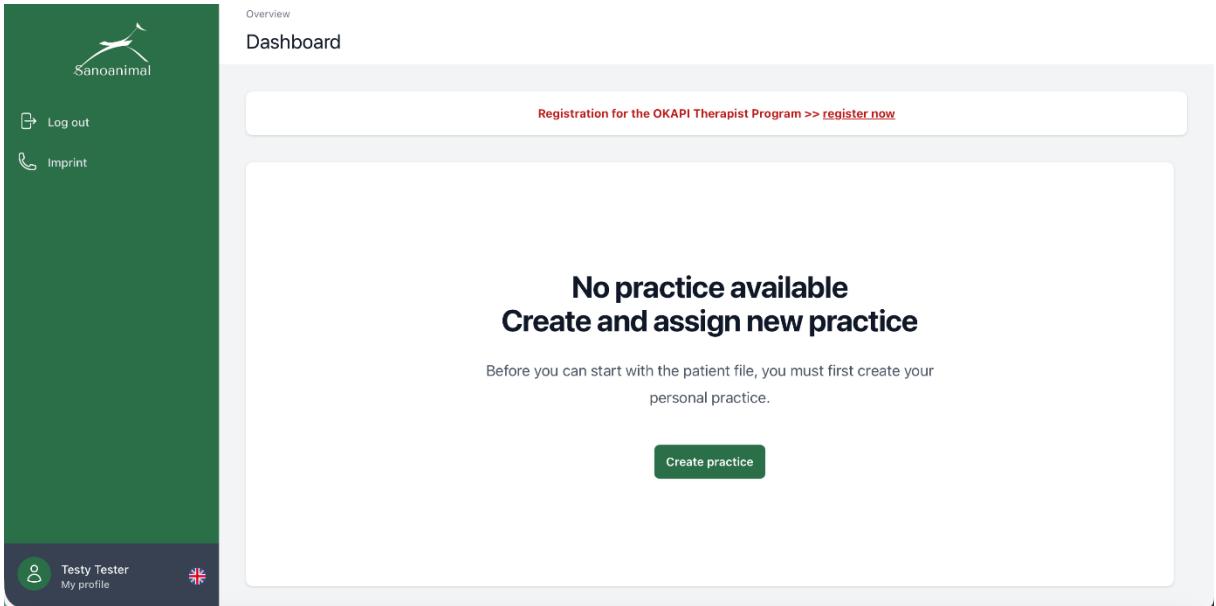
**Multiple Devices**  
You have access to your data via PC, tablet or smartphone.

**Multiple Accounts**  
You can access your data from multiple staff accounts.

Menü anzeigen

- Visit the website <https://sanoanimal.com/practitioner-software>
- Click "Register" in the top right corner
- Fill out the form and click "Create Account"
- Confirm your email address via the link in the confirmation email (check your spam folder if necessary)

## 2. Create Practice:



Overview

Dashboard

Registration for the OKAPI Therapist Program >> [register now](#)

**No practice available**  
Create and assign new practice

Before you can start with the patient file, you must first create your personal practice.

**Create practice**

Log out

Imprint

Testy Tester  
My profile

- After logging in, select the "Create Practice" button
- Enter all required information
- Online Shop Selection:
  - Regular: OKAPI GmbH
  - Therapists from Switzerland: ImFuttersack.ch
  - Therapists from Netherlands: OKAPI-Shop.nl
  - Therapists from United Kingdom: OKAPI-Shop.com

### **3. Add Pet Owners and Animals:**

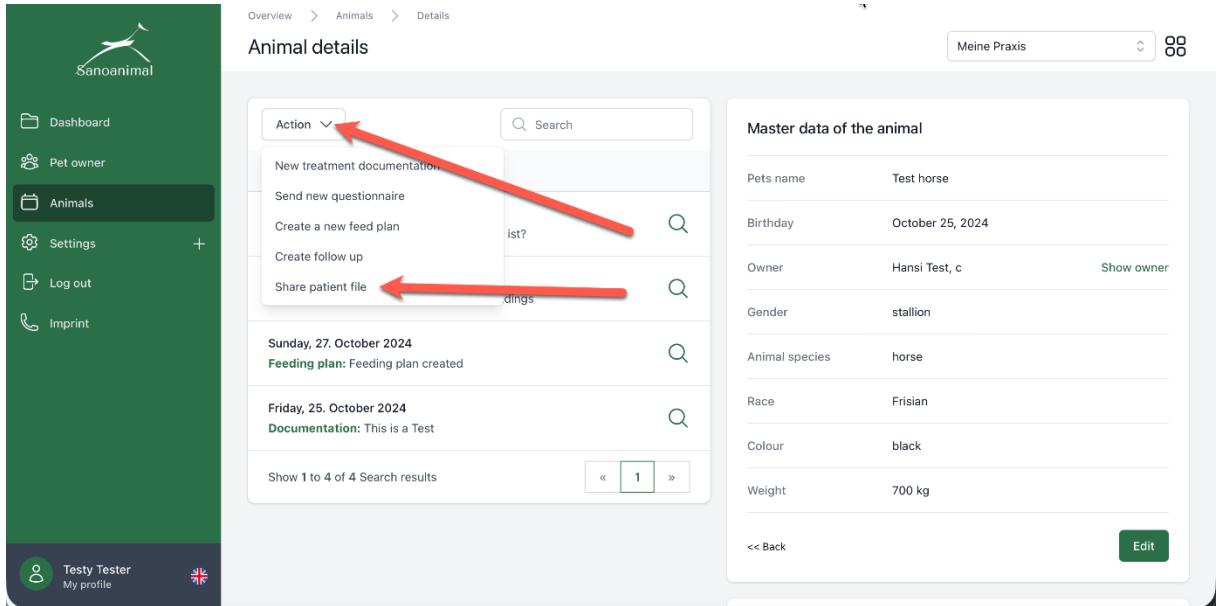
- After setting up your practice, you can add pet owners and animals as well as create documentation

**Support:** For questions, contact: [office@sanoanimal.com](mailto:office@sanoanimal.com)

# Practitioner Software - Step-by-Step Guide

Would you like to share a case file from your account with another therapist? Or submit it for Sanoanimal case studies?

## 1. Share case files:



The screenshot shows the 'Animal details' page for a 'Test horse'. The 'Action' dropdown menu is open, and the 'Share patient file' option is highlighted with a red arrow. The 'Master data of the animal' section on the right includes fields for Pet name (Test horse), Birthday (October 25, 2024), Owner (Hansi Test, c), Gender (stallion), Animal species (horse), Race (Frisian), Colour (black), and Weight (700 kg). A red double-headed arrow highlights the 'Share patient file' option in the dropdown menu.

- In the animal view, click "Share Patient File" in the "Action" menu

## 2. Select Information

- In the input field, briefly describe the case (this text will be displayed first to the person you're sharing the case with)
- Select the elements to be shared:
  - Documentation
  - Questionnaires
  - Feeding plans
  - Files/Images
- Important: Unselected elements remain invisible
- Finally, click "Share Data"

## 3. Manage Shared Information:

- After sharing, you can view all shared information
- Adjustments are possible via "Edit Documentation"
- To stop sharing, click "Stop Sharing"
- Voice memos are not shared

**4. Share the Link:**

- Pass the generated link to colleagues or the Sanoanimal team for case studies (via email to [office@sanoanimal.com](mailto:office@sanoanimal.com))
- Important: Recipients also need an established practice at <https://sanoanimal.com/practitioner-software>

**5. Consider Data Privacy:**

- Shared data is monitored via "Share Patient File" in the dashboard
- By default, sharing is disabled after 21 days
- If needed longer, you can extend the release in the overview

**Support:** For questions, contact: [office@sanoanimal.com](mailto:office@sanoanimal.com)

# Viewing Shared Patient Files - Step-by-Step Guide

Have you received a patient file link and would like to view a shared case?

## Prerequisites:

- Access to the system (<https://sanoanimal.com/practitioner-software>)
- To view a case that has been shared with you, you need your own free practice account

## Procedure:

### 1. Practice Created?

- Yes: Click on the received link and log in
- No: Follow the steps to create a login and practice

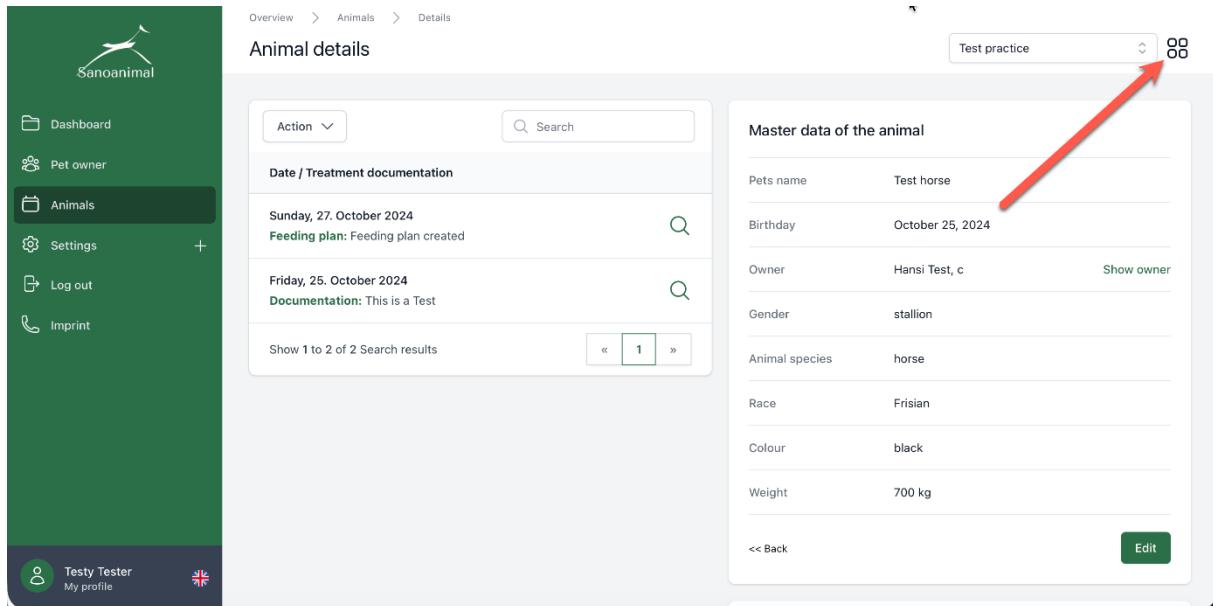
### 2. Confidentiality Agreement:

- Before accessing the shared record, you must confirm the confidentiality agreement
- View Data: After confirmation, you have access to the released data

**Support:** For questions, contact: [office@sanoanimal.com](mailto:office@sanoanimal.com)

# Generating OKAPI Vouchers in the Practitioner Software (for your customers or personal use)

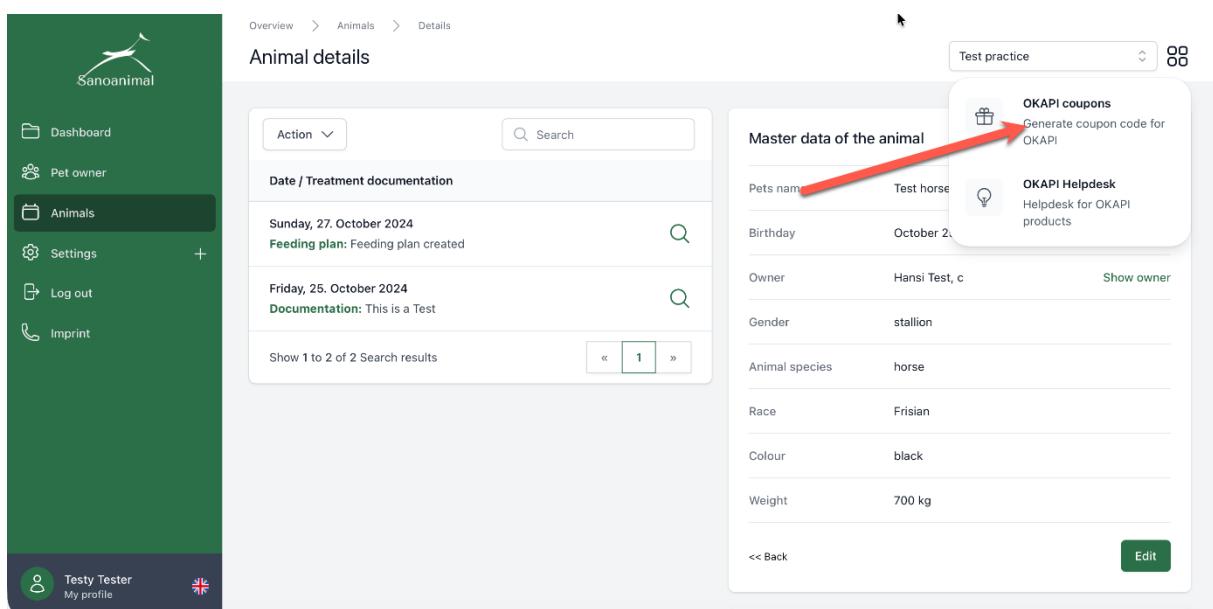
You can generate OKAPI vouchers directly in the practitioner software for your customers and also for your personal use. To do this, first click on the four dots at "My Practice":



The screenshot shows the 'Animal details' page for a horse named 'Test horse'. The 'Master data of the animal' section includes fields for Pets name (Test horse), Birthday (October 25, 2024), Owner (Hansi Test, c), Gender (stallion), Animal species (horse), Race (Frisian), Colour (black), and Weight (700 kg). The 'Edit' button is located at the bottom right of this section. The top right corner of the screen features a 'My Practice' dropdown menu with a red arrow pointing to it. The left sidebar shows navigation options: Dashboard, Pet owner, Animals (selected), Settings, Log out, and Imprint. The bottom left corner shows the user profile 'Testy Tester' and a language switcher.

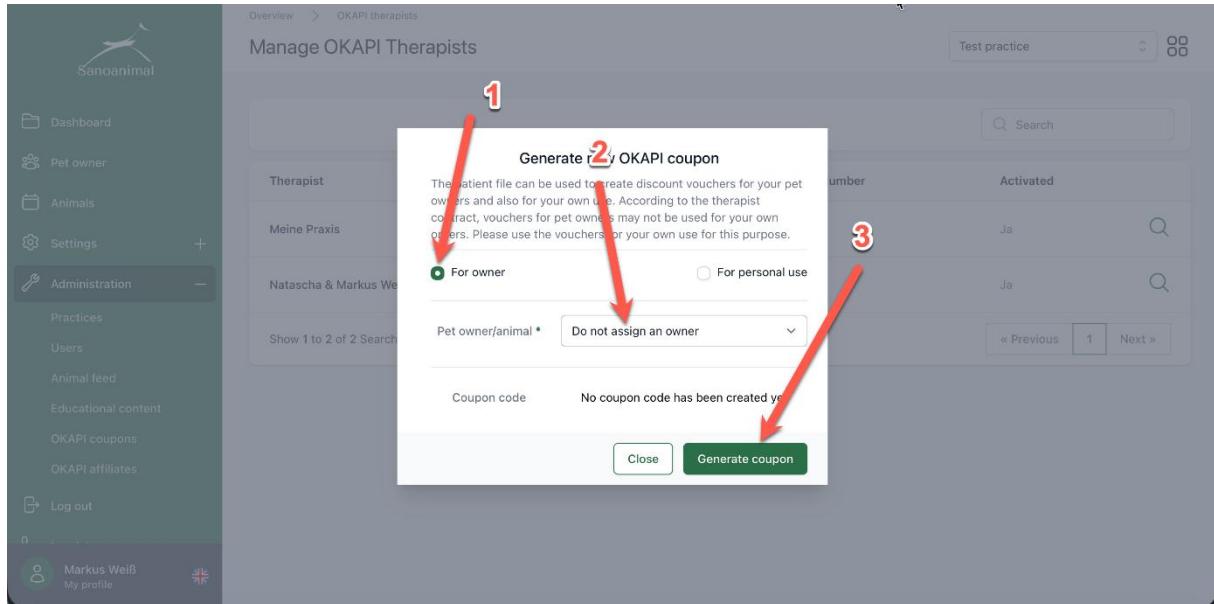
When using the voucher function for the first time, you must register once (follow the registration form).

Then you can select "Okapi Vouchers: Generate voucher code for Okapi":



The screenshot shows the 'Animal details' page for a horse named 'Test horse'. A tooltip is displayed over the 'OKAPI coupons' button, which contains the text 'Generate coupon code for OKAPI'. The 'Master data of the animal' section includes fields for Pets name (Test horse), Birthday (October 25, 2024), Owner (Hansi Test, c), Gender (stallion), Animal species (horse), Race (Frisian), Colour (black), and Weight (700 kg). The 'Edit' button is located at the bottom right of this section. The top right corner of the screen features a 'My Practice' dropdown menu. The left sidebar shows navigation options: Dashboard, Pet owner, Animals (selected), Settings, Log out, and Imprint. The bottom left corner shows the user profile 'Testy Tester' and a language switcher.

After that, you can choose whether you want to assign the voucher to an owner or leave it unassigned. When you click "Request Voucher," the voucher is generated and you can pass the voucher code on to your customers:



If you want to create a voucher code for yourself, i.e., for your personal use, please check the "For Personal Use" field. When you click "Request Voucher," the voucher is generated and you can use the voucher code for your order for your personal use at OKAPI:

