The image shows the open rear of a white delivery truck. The interior is packed with numerous pet carriers. On the left side, several large, tan-colored carriers are stacked vertically. On the right side, a variety of smaller carriers in different colors (white, grey, red, green) are stacked. Some of these carriers have dogs visible through their wire mesh fronts. In the foreground, on the right side of the truck's floor, a large, light-brown dog is lying down inside a wire mesh carrier, looking towards the camera. The truck's rear door is open, and the interior is well-lit. The background shows some greenery and a clear sky.

# **VOLUME CLIENT PORTAL GUIDE**

# 2021

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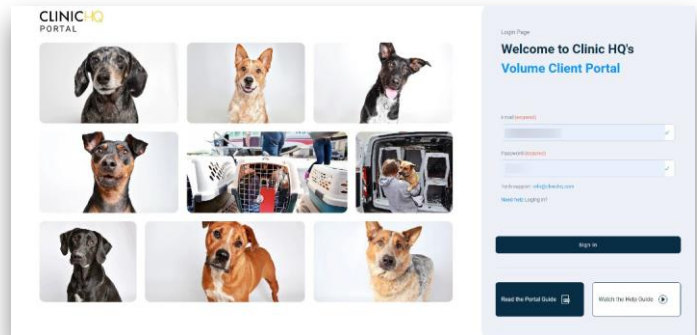


# WHAT IS THE PORTAL?

The Volume Client Portal (or the "VCP") is a software designed for volume clients to pre-enter data about their animals and to sign consent forms electronically. Doing these two things will help expedite check in and check out. It also provides a way for volume clients to provide all information about their animals and sign consent forms in a "contactless" way which will reduce the spread of the COVID-19 virus.

## Login

Login at <https://portal.clinichq.com>. Once your partnering clinic sets your group up you'll receive an email which asks you to setup an email and password.



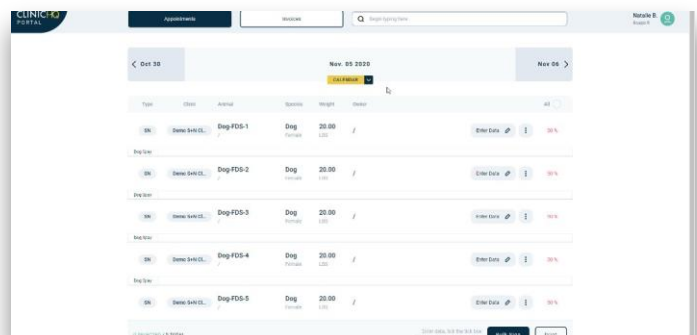
## View Calendar

The clinic will schedule your appointments. Once they are scheduled, your appointments display on the calendar.



## Enter Data

The next visit date will default on the screen. Click 'enter data' button next to the first animal to begin.





# WHAT IS THE PORTAL?

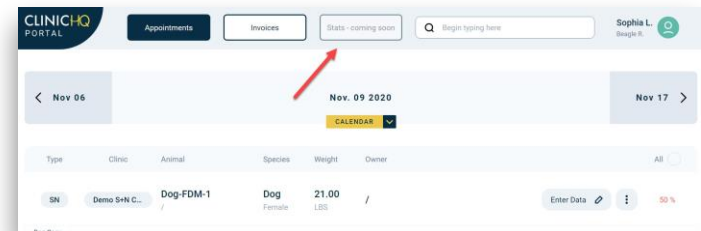
## Sign Consents

The VCP provides a way for you to electronically sign surgical consent forms. Once signed, they are auto uploaded to the animal's profile at the clinic.



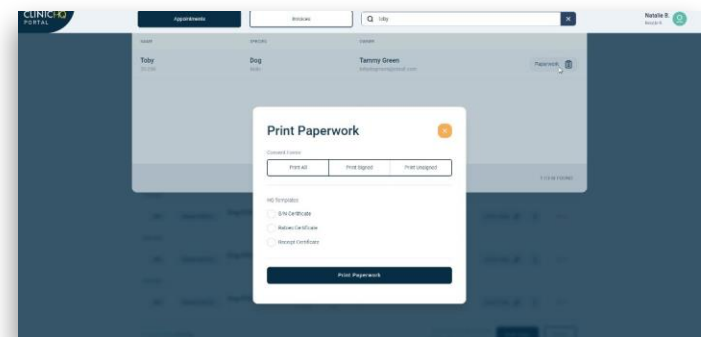
## See Stats

The statistics section will be released in early 2021.



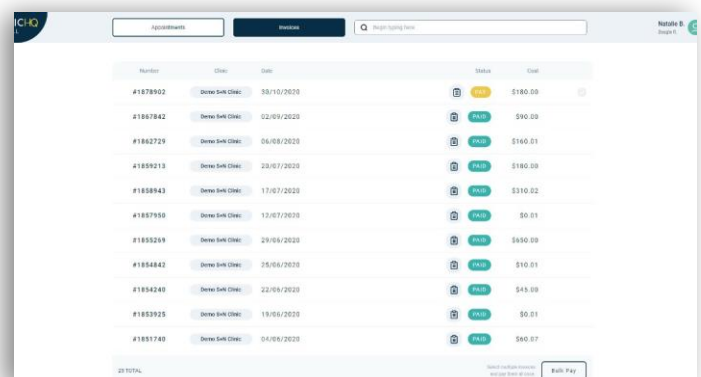
## Print Paperwork

Print rabies and spay/neuter certificates for every animal. Search by animal name, chip number, or owner name to find their paperwork.



## View & Pay Invoices

A handy way to view all paid and unpaid invoices. If your clinic accepts online payments, you can even pay invoices through the portal.



Number	Clinic	Date	Status	Cost
#1878932	Demo Spay Clinic	03/10/2020	PAID	\$180.00
#1867842	Demo Spay Clinic	02/09/2020	PAID	\$90.00
#1862729	Demo Spay Clinic	06/08/2020	PAID	\$160.01
#1859218	Demo Spay Clinic	23/07/2020	PAID	\$160.00
#1858843	Demo Spay Clinic	17/07/2020	PAID	\$310.02
#1857956	Demo Spay Clinic	12/07/2020	PAID	\$0.01
#1855269	Demo Spay Clinic	29/06/2020	PAID	\$600.00
#1854842	Demo Spay Clinic	25/06/2020	PAID	\$10.01
#1854240	Demo Spay Clinic	22/06/2020	PAID	\$43.00
#1853925	Demo Spay Clinic	19/06/2020	PAID	\$0.01
#1851740	Demo Spay Clinic	04/06/2020	PAID	\$60.07

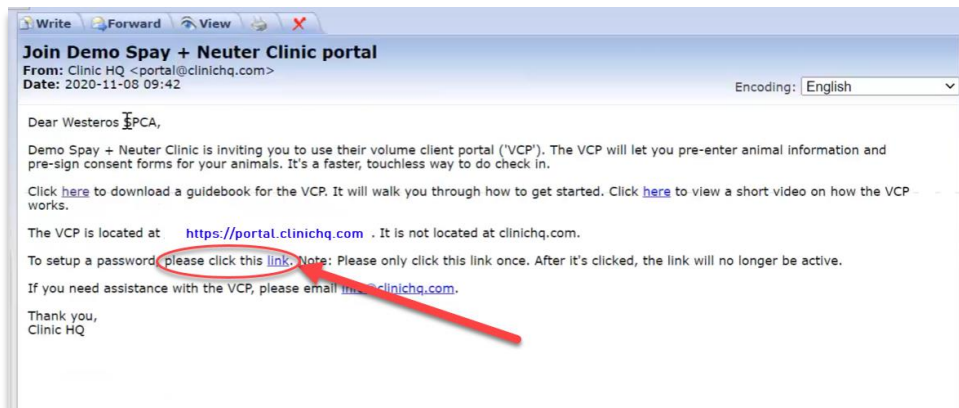
# STEP BY STEP GUIDE

What follows is a step by step guide to accessing and using the portal.

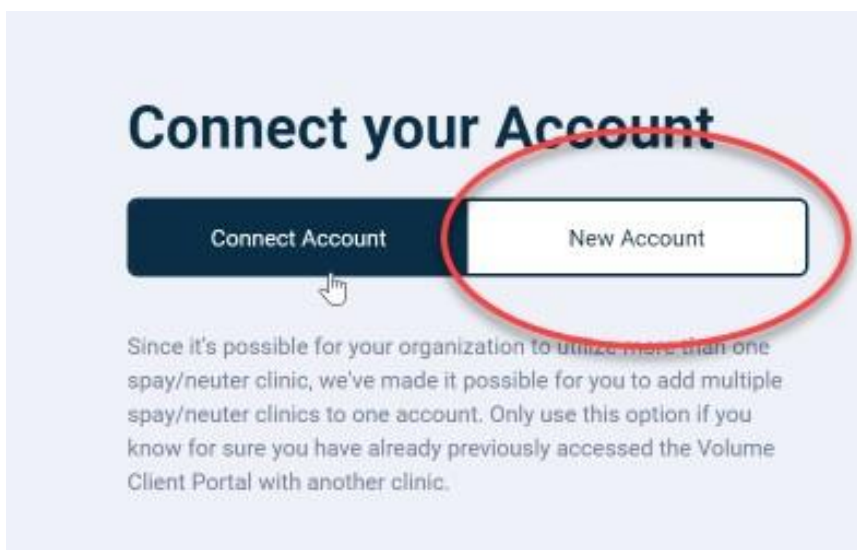
## How to login

The clinic must first set your organization up with a portal. Once that is done, one person in your organization will receive an email which asks you to establish a login and password. Only one person in your organization will be setup originally, but you can add as many as you like after logging in.

1. In the email, click? Volume Client Portal? to establish your credentials.



2. Click the "New Account: button. Unless your organization takes animals to multiple spay / neuter clinics and you already have an account with another clinic. This would be highly unusual, but possible.

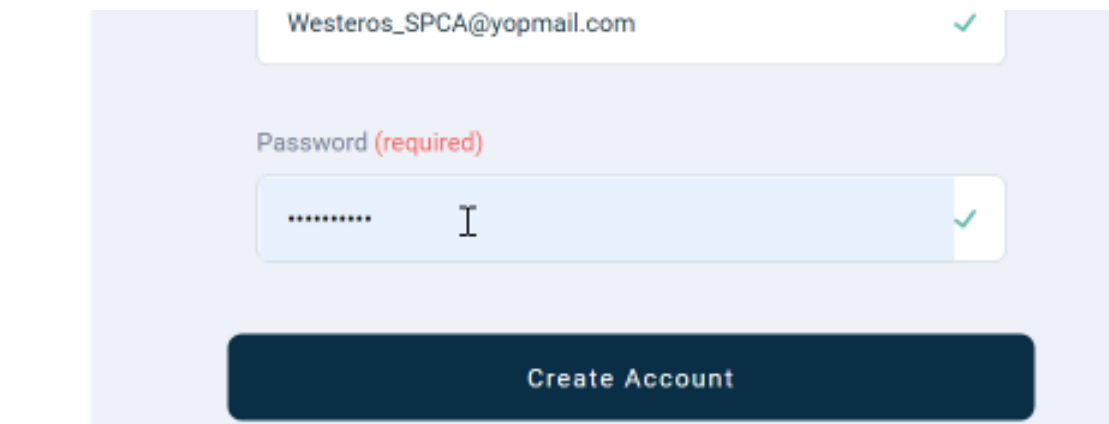


# STEP BY STEP GUIDE

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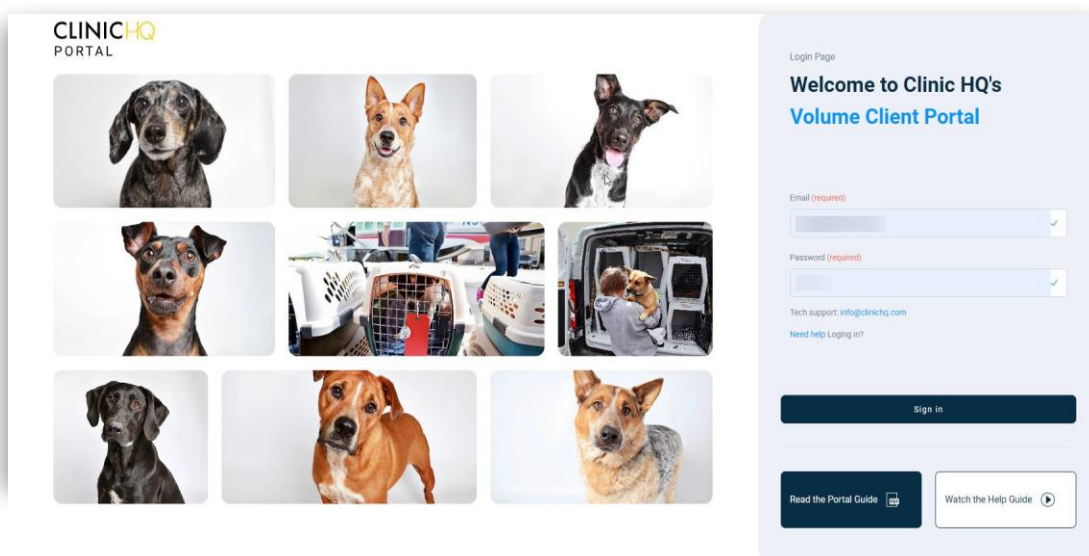
## How to login

3. Enter name, organizational name, email and password and click “Create an account” button.



A screenshot of a web form for creating an account. The form has a light blue background. At the top, there is a text input field containing the email address "Westeros\_SPCA@yopmail.com" with a green checkmark icon to its right. Below this is a label "Password (required)" in red text. Under the label is a password input field with a blue background, showing masked characters "\*\*\*\*\*" and a cursor. A green checkmark icon is to the right of the password field. At the bottom of the form is a dark blue button with the text "Create Account" in white.

4. You will be taken to the main portal page. If not, navigate to <https://portal.clinichq.com> and login.

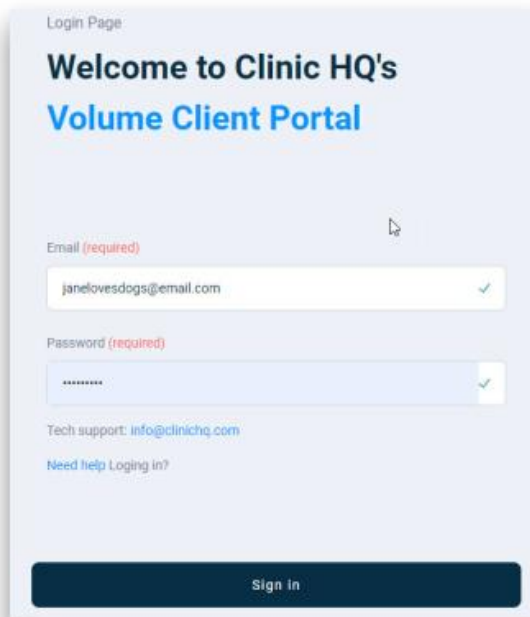


# STEP BY STEP GUIDE

What follows is a step by step guide to accessing and using the portal.

## How to login

5. Type in your email address into the Email field, and your password into the password field. Passwords must be eight characters or more and have one non-alphanumeric character such as an exclamation point or dollar sign.



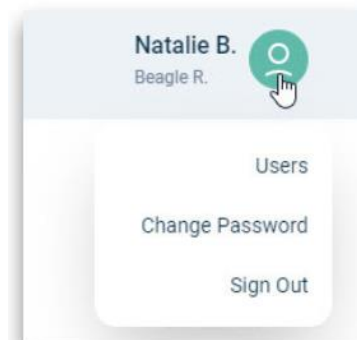
The screenshot shows a login page titled "Login Page" with the heading "Welcome to Clinic HQ's Volume Client Portal". It features two input fields: "Email (required)" with the value "janelovesdogs@email.com" and a checkmark, and "Password (required)" with masked characters and a checkmark. Below the fields is a link for "Tech support: info@clinchq.com" and a link for "Need help Logging In?". At the bottom is a dark blue "Sign In" button.

6. Forgot your password? Click the Need help Logging In? link at <https://portal.clinichq.com> and an email will be sent to you to setup a new password

If it's saying your email is not found - first make sure you are at the PORTAL link -- which is <https://portal.clinichq.com> – NOT CLINICHQ.COM (this is what the clinic uses).

To change your password later on, click on the icon of a person in the upper right corner and select Change Password and follow the prompts.

Here is also where you logout.



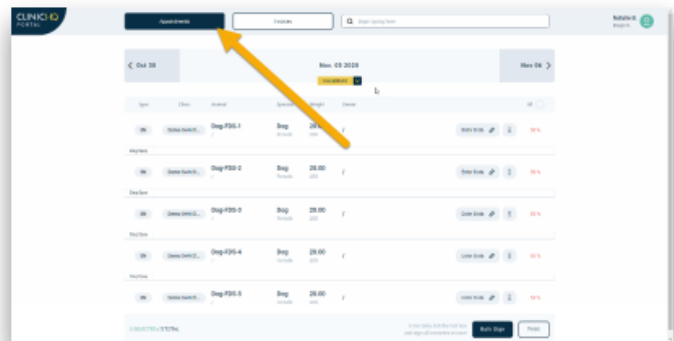
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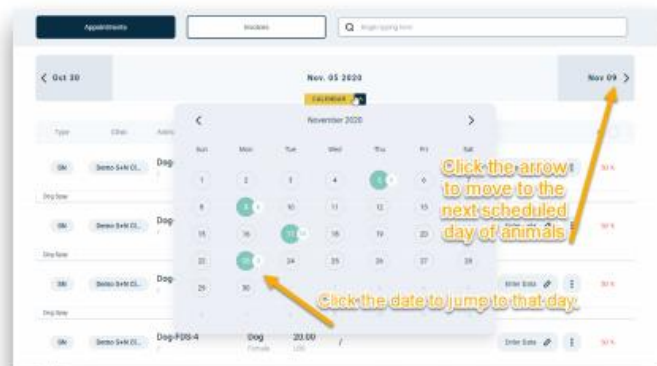
## How to Enter Data

Pre-entering data on your animals will really help expedite check in. The correct order of procedures is to first enter data and services for your animals and then to sign the consent form. It's important to first enter data because when you get to the point of generating the consent form to sign, the software inserts "smart fields" into the actual consent which auto-populate with inputted data.

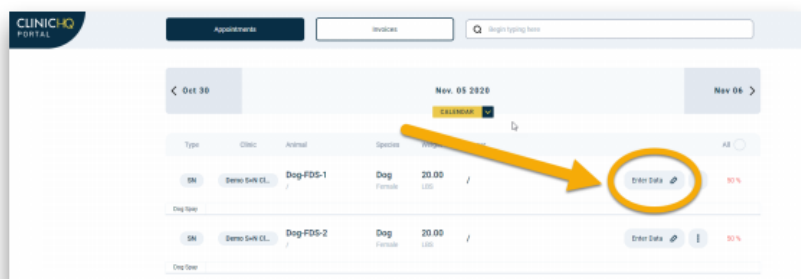
7. Click "Appointments" on the top of the page. If you are not already on this screen.



8. If the clinic has scheduled appointments for your organization, they will be displayed on the calendar. The nearest appointments will be auto-displayed.



9. Click "Enter Data" button.





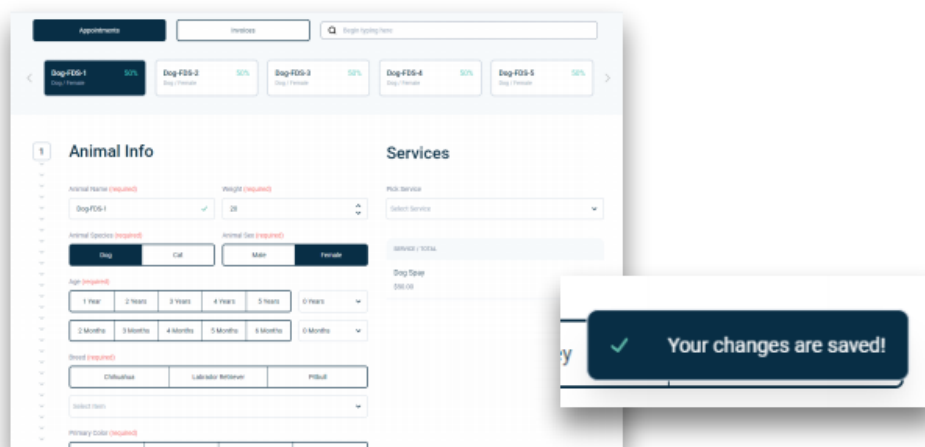
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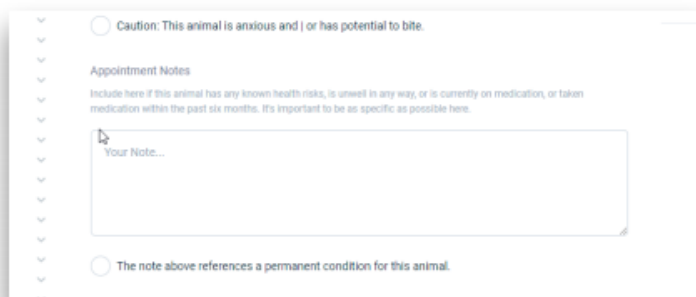
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Pre-entering data on your animals will really help expedite check in. The correct order of procedures is to first enter data and services for your animals and then to sign the consent form. It's important to first enter data because when you get to the point of generating the consent form to sign, the software inserts "smart fields" into the actual consent which auto-populate with inputted data.

10. Enter animal info on left, services on the right, and owner information at the bottom - under animal details. Click quick buttons offer the most common options. Use the drop-down list to choose from the full menu. Animal details, services, and owner info will auto Save. A pop-up will appear at the bottom of the screen to let you know anytime a change is made and saved.

A screenshot of a web application interface for entering animal information. The interface is divided into two main sections: 'Animal Info' on the left and 'Services' on the right. The 'Animal Info' section includes fields for 'Animal Name (required)', 'Weight (required)', 'Animal Species (required)', 'Animal Sex (required)', 'Age (required)', 'Breed (required)', and 'Primary Color (required)'. There are also buttons for 'Cat', 'Dog', 'Male', and 'Female'. The 'Services' section has a 'Select Service' dropdown and a 'Dog Size' dropdown. A dark blue notification box with a green checkmark and the text 'Your changes are saved!' is overlaid on the bottom right of the form.

11. Tick the caution field if the staff should be careful when handling this animal. Any important medical info like current medications or issues, enter in "Appointment Notes."

A screenshot of the 'Appointment Notes' section of the web application. It features a checkbox labeled 'Caution: This animal is anxious and / or has potential to bite.' Below this is a text area for 'Appointment Notes' with a placeholder text: 'Include here if this animal has any known health risks, is unwell in any way, or is currently on medication, or taken medication within the past six months. It's important to be as specific as possible here.' There is a text input field labeled 'Your Note...' and a checkbox at the bottom labeled 'The note above references a permanent condition for this animal.'

# STEP BY STEP GUIDE

What follows is a step by step guide to accessing and using the portal.

## How to Enter Data

12. Add Services. Choose what the animal needs during the visit from the drop-down menu. It will be added to the requested services list.

The 'Services' form includes a sidebar with 'Sex' (Male/Female), 'Age' (Years/Months), and 'Breed' (Pitbull). The main section, titled 'Services', features a 'Pick Service' dropdown menu. Below the menu is a table of services: 'Dog Spay' (\$50.00), 'Bordetella Vaccine' (\$15.00), and 'Abscess - lance/flush' (\$7.00). Each service entry has a red trash icon for removal.

13. When entering owner Information, note: only enter details here if the animal has an owner. If your organization is the owner, do not enter any information in the Owner section.

The 'Owner Info' form is titled '2 Owner Info' and includes a red instruction: 'If this animal is owned by someone other than your organisation, enter that owner's info here, otherwise leave blank.' It contains input fields for 'First Name' (Eg. John), 'Last Name' (Eg. Doe), 'Cell Phone' (Eg. 000 000 0000), 'Home Phone' (Eg. 000 000 0000), 'Email' (Eg. john.doe@gmail.com), and 'Address'. An 'Enter custom address' button is located at the bottom right.

14. Once you have completed the current animal. Scroll down to the bottom of the page and click 'Next Animal' to begin entering those details.

The 'Next Animal' section displays a table with the following data:

Name	Clinic Name	Complete
Dog-FDS-2	Demo S+N Clinic	50%

A right arrow button is positioned to the right of the table.

# STEP BY STEP GUIDE

What follows is a step by step guide to accessing and using the portal.

## How to sign consent forms

Consent forms are the documents we require in order to be able to perform surgery on your animals. We need one signed consent form per animal. HQ has automated the signing of consent forms.

15. Click Appointments link on the top of the page to be taken back to the list of appointments/animals that are scheduled. For each animal where you've filled in data, be sure each is 100% complete or else you will not be able to sign the consent.

Select the animals you wish to sign a consent for or choose the All option.

The screenshot shows a web interface for managing animal appointments. At the top, there are date filters for 'Nov 02', 'Nov. 05 2020', and 'Nov 09'. Below this is a 'CALENDAR' dropdown. The main area is a table with columns: Type, Clinic, Animal, Species, Weight, and Owner. Two animals are listed: 'Tilly' (Dog, Female, 28.00 LBS) and 'Zane' (Dog, Female, 20.00 LBS). To the right of each animal is a green checkmark icon. An orange arrow points from the text 'Select ALL animals to sign consent forms for' to the 'All' radio button. Another orange arrow points from the text 'Select individual animals by checking or unchecking the tick mark.' to the green checkmark next to 'Zane'.

16. Then select 'Bulk Sign' at the bottom of the screen.

This screenshot shows the bottom of the animal appointment list. It displays four animals: 'Zane', 'Snoozy', 'Tulip', and 'Pamela'. Each animal has a green checkmark icon to its right. At the bottom of the screen, there is a status bar that says '6 SELECTED / 12 TOTAL'. To the right of this bar is a 'Bulk Sign' button, which is highlighted by an orange arrow. Next to the 'Bulk Sign' button is a 'Print' button. Above the 'Bulk Sign' button, there is a small text prompt: 'Enter data, tick the tick box and sign all consents at once'.

# STEP BY STEP GUIDE

What follows is a step by step guide to accessing and using the portal.

## How to sign consent forms

Consent forms are the documents we require in order to be able to perform surgery on your animals. We need one signed consent form per animal. HQ has automated the signing of consent forms.

17. You'll then be shown the terms of agreement for signing digitally. Click I Agree.

The screenshot shows a web interface for digital signing. At the top, there are three tabs: 'Terms' (selected), 'Sign', and 'Summary'. Below the tabs is a 'Terms and Conditions' window. The window contains the following text:

**Terms and Conditions**

**ELECTRONIC RECORD AND SIGNATURE DISCLOSURE**

Please read the following information carefully. By clicking the 'I agree' button, you agree that you have reviewed the following terms and conditions and consent to transact business electronically using Clinic HQ electronic signature system. If you do not agree to these terms, do not click the 'I agree' button.

**Electronic documents**

Please note that @Model.SenderName (@Model.SenderEmail) ("we", "us" or "Company") will send all documents electronically to you to the email address that you have given us during the course of the business relationship unless you tell us otherwise in accordance with the procedure explained herein. Once you sign a document electronically, we will send a PDF version of the document to you.

**Request for paper copies**

You have the right to request from us paper copies of the documents that are sent to you electronically. You have the ability to download and print documents that are sent to you electronically. If you wish to receive paper copies of the documents that we have sent to you electronically, you can send an email to @Model.SenderEmail.

**Withdrawing your consent**

At any point in time during the course of our business relationship, you have the right to withdraw your consent to receive documents in electronic format. If you wish to withdraw your consent, you can decline to sign a document that we have sent to you and send an email to @Model.SenderEmail informing us that you wish to receive documents only in paper format. Upon request from you, we will stop sending documents using Clinic HQ electronic signature system.

**To advise @Model.SenderName of your new email address**

If you need to change the email address that you use to receive notices and disclosures from us, write to us at @Model.SenderEmail.

At the bottom of the window, there are two buttons: 'I Don't Agree' and 'I Agree'. A yellow arrow points to the 'I Agree' button.

# STEP BY STEP GUIDE

What follows is a step by step guide to accessing and using the portal.

## How to sign consent forms

Consent forms are the documents we require in order to be able to perform surgery on your animals. We need one signed consent form per animal. HQ has automated the signing of consent forms.

18. Fill in any tick boxes, or text boxes required. Sign the form. It can be signed on any device.

19. Once the first consent is signed, you will have the option to duplicate all fields and signatures to the rest of the animals' consent forms.

Then, select a consent form to change the response for that specific animal.



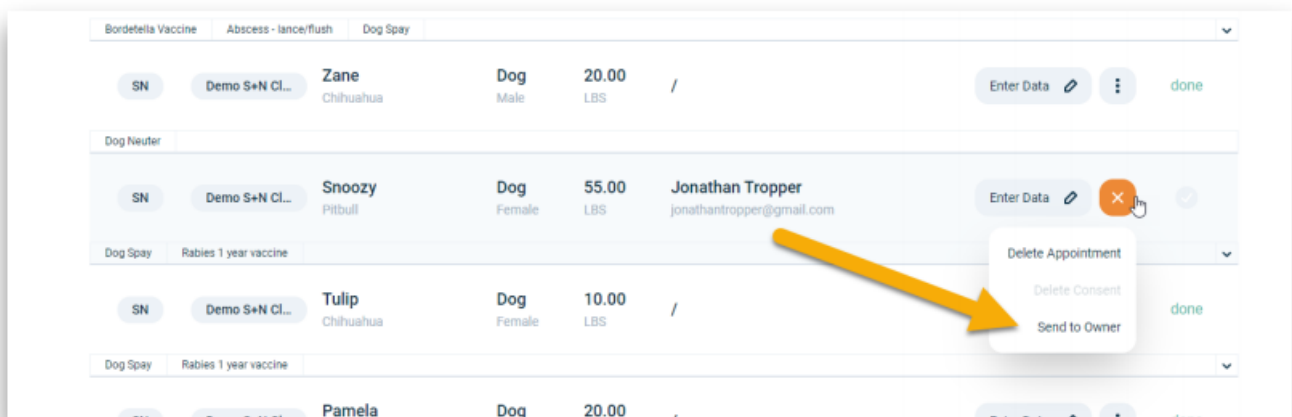
# STEP BY STEP GUIDE

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## Sending consent form to owners

You can also send the consent form to owners to fill out. If you input information in the Owner section, in particular an email address.

Click the three dots beside 'enter data' and select "Send to Owner." If this button is clicked, it will send the consent form to the email in the Owner section for the owner to sign.



# COOL PARTS OF THE PORTAL

## The "Search Animals" Section

You can search animals by Owner's name, Animal name or ID, Microchip number or Rabies Tag and print all paperwork related to the animal.

The screenshot shows the CLINIC HQ PORTAL interface. At the top, there are navigation buttons: 'Appointments', 'Invoices', and 'Stats - coming soon'. A search bar contains the text 'SALLY'. To the right of the search bar is a user profile for 'Sam S. Westeros SPCA'. Below the navigation bar is a table with columns: NAME, SPECIES, and OWNER. The table contains one entry for 'Sally', a 'Dog', with owner information represented by a slash '/'. To the right of the table is a 'Paperwork' button with a document icon. Two orange arrows point from the search bar and the 'Paperwork' button towards the 'Print Paperwork' modal.

NAME	SPECIES	OWNER
Sally 20-259	Dog Female	/

The 'Print Paperwork' modal is displayed over the search results. It has a title 'Print Paperwork' and a close button 'X'. Inside the modal, there are four rows, each with a label and a checkbox:

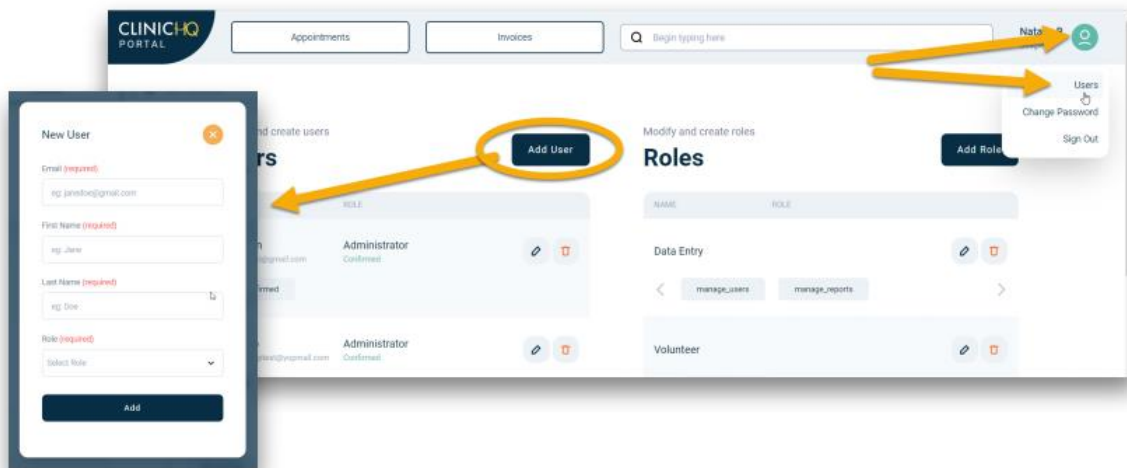
- Consent Form ☐
- S/N Certificate ☒
- Rabies Certificate ☒
- Receipt Certificate ☐

At the bottom of the modal is a dark blue button labeled 'Print'.

# COOL PARTS OF THE PORTAL

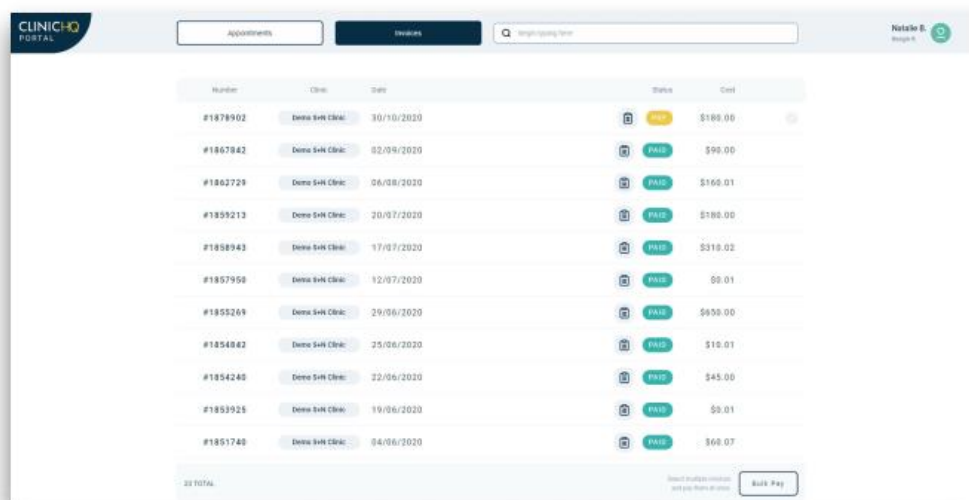
## User Management

Volume clients control their own users. Each volume client can add or delete users as necessary. They can even setup "Roles" for users which lets certain users do certain things. To set up a new user, go to person icon (upper right). It is recommended to have two admin users for a volume client portal.



## Viewing/Paying Invoices

To view or pay invoices, go to the Invoices link on the top toolbar. View the invoice by clicking the line item. Select the invoice(s) you wish to pay on and click Bulk Pay at the bottom of the screen.



# TECHNICAL ASSISTANCE

## Email

If you are having an issue and need technical support with the volume client portal, email [info@clinichq.com](mailto:info@clinichq.com). Be sure to include a phone number where you can be reached and a thorough description of the problem.

## Schedule a Support Session

Feel free to schedule a quick 15 minute one on one support session with screen share. Click this link to sign up:

<https://calendly.com/hq-university/one-on-one-tech-support>

## Watch a Video

We've created a four-minute video about how the volume client portal works. It's accessible at <https://portal.clinichq.com>.