



**VOLUME
CLIENT
PORTAL
GUIDE**

2021

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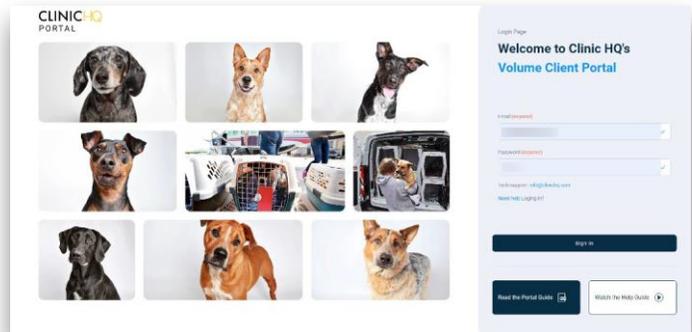


WHAT IS THE PORTAL?

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.



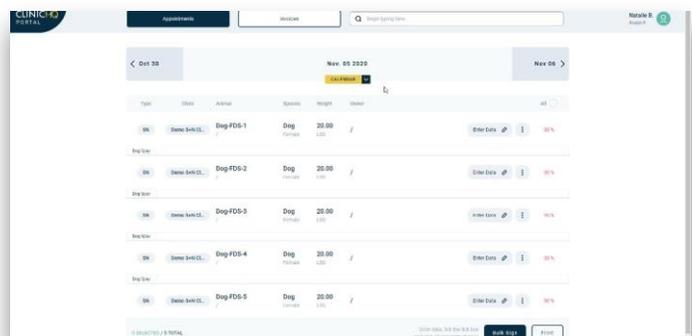
View Calendar

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.



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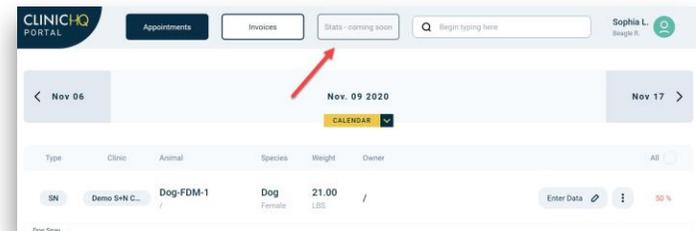
Sign Consents

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.



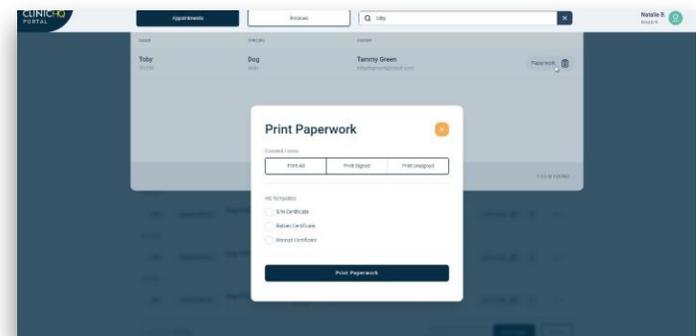
See Stats

The statistics section will be released in early 2021.



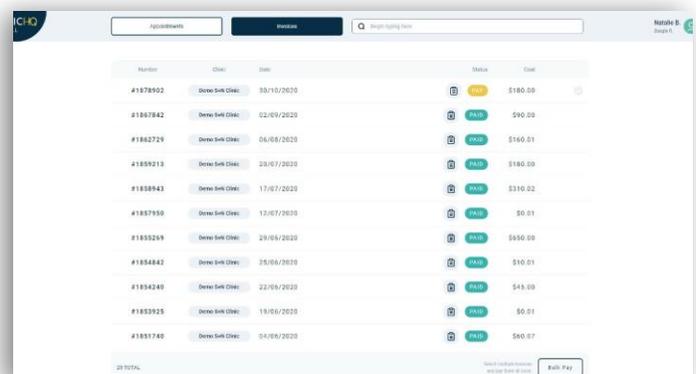
Print Paperwork

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.



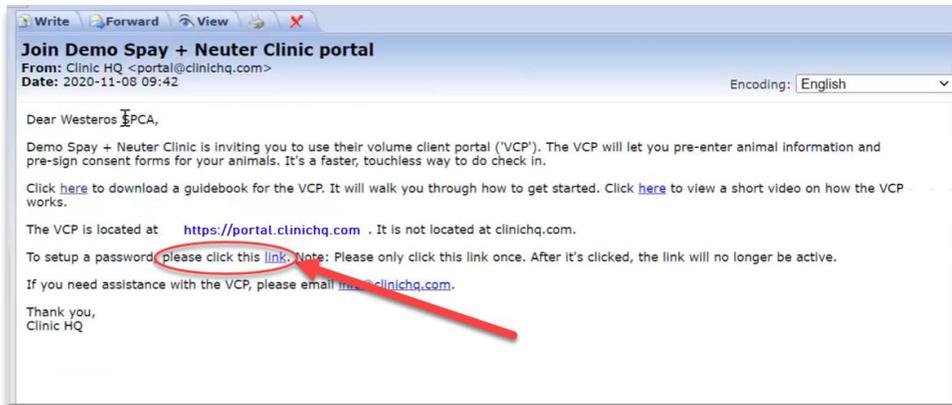
STEP BY STEP GUIDE

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

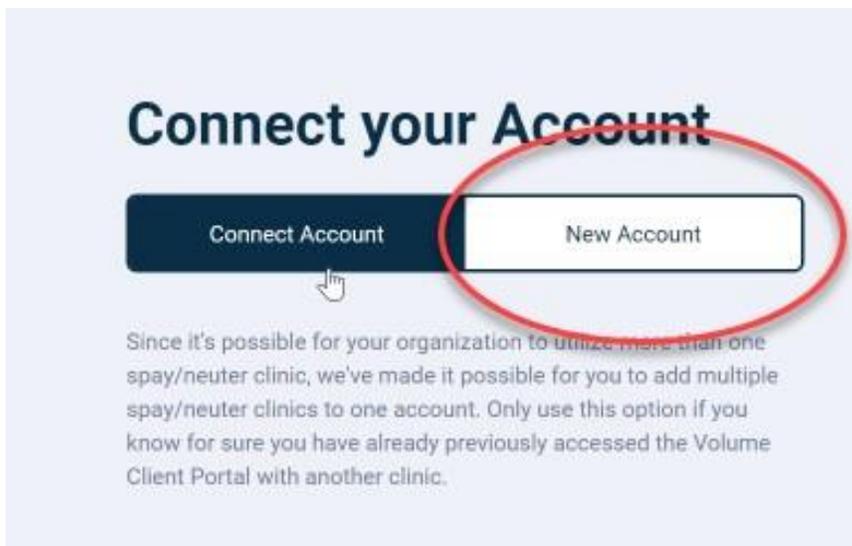
How to login

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.

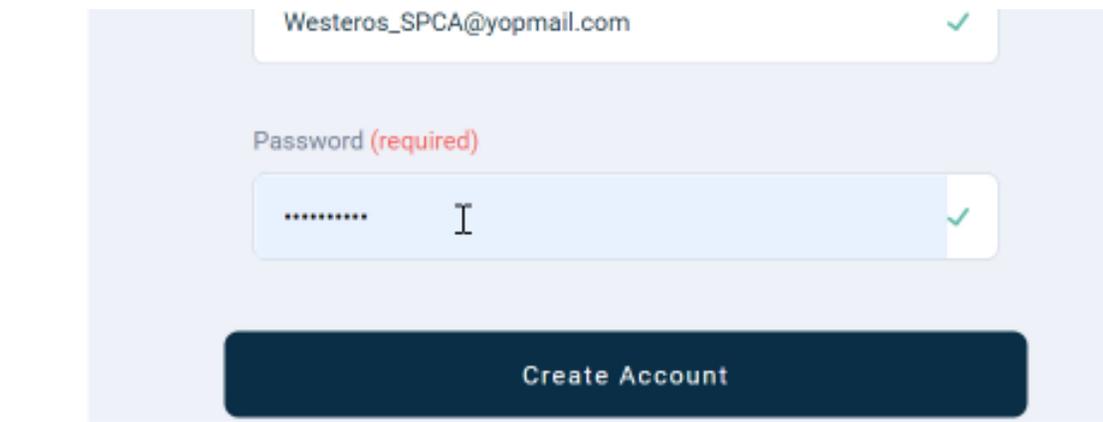


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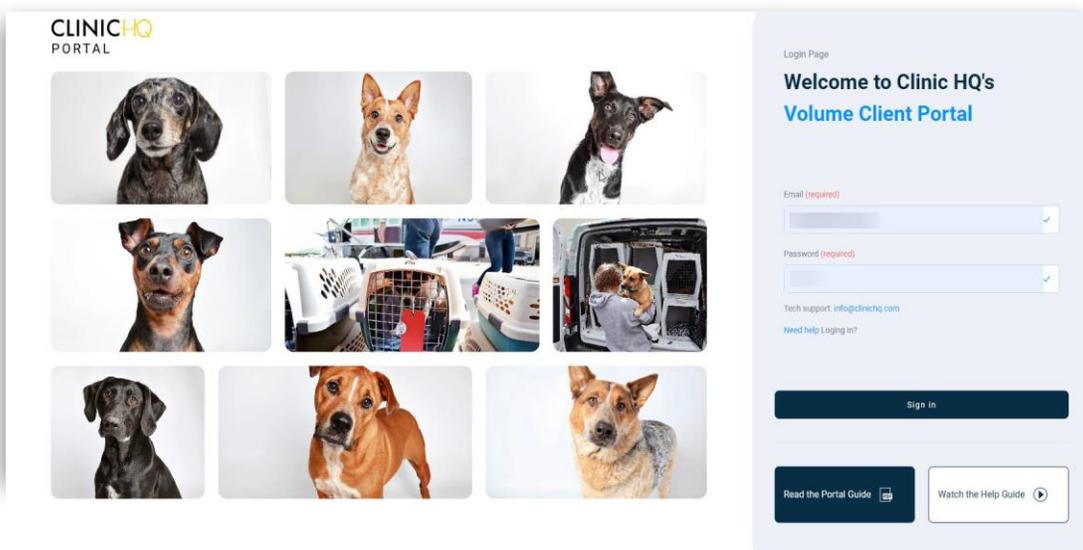
How to login

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



A screenshot of a web form for account creation. The form has two input fields. The first field contains the email address "Westeros_SPCA@yopmail.com" and has a green checkmark on the right. The second field is labeled "Password (required)" and contains a series of dots for a password, with a cursor and a green checkmark on the right. Below the fields is a dark blue button with the text "Create Account".

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

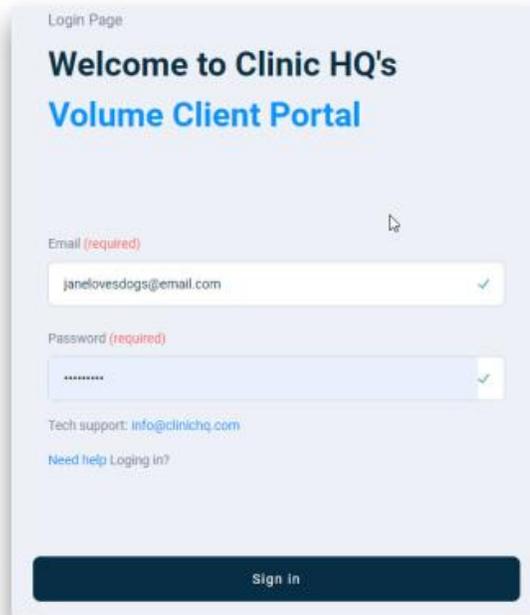


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How to login

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.

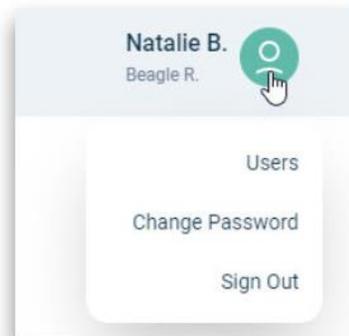


6. Forgot your password? Click the Need help Logging In? link at <https://portal.clinichq.com> and an email will be sent to you to setup a new password

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.



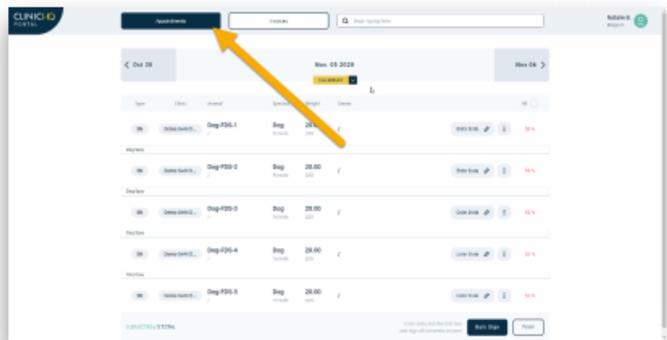
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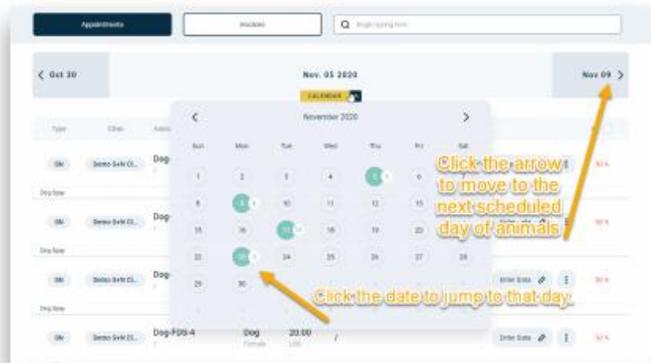
How to Enter Data

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.

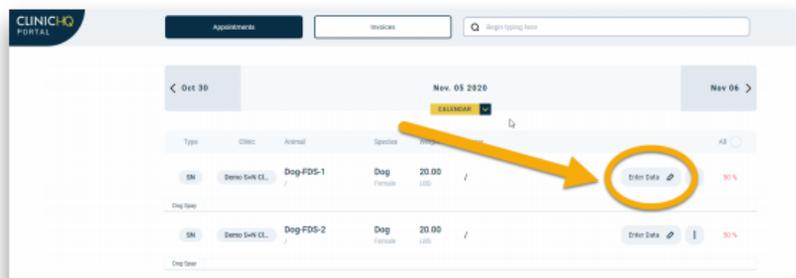
7. Click "Appointments" on the top of the page. If you are not already on this screen.



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.



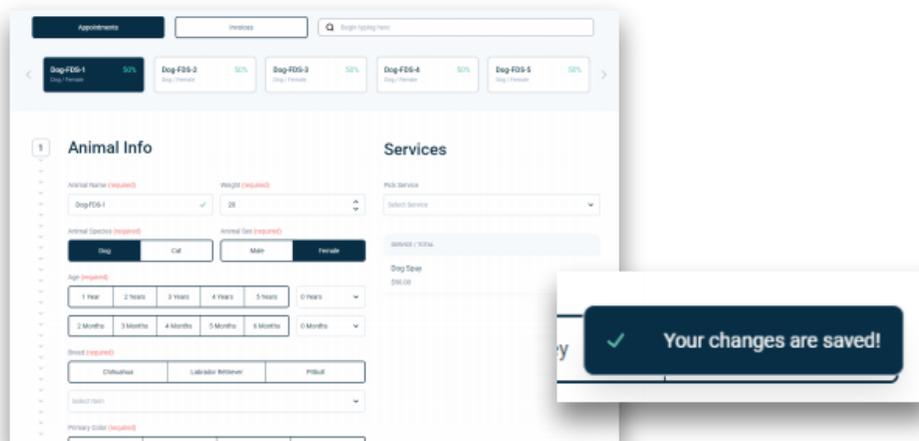
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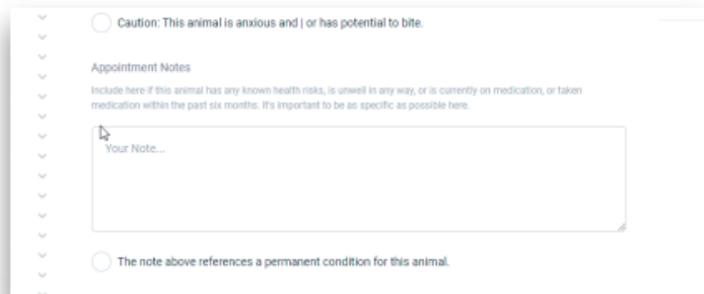
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10. Enter animal info on left, services on the right, and owner information at the bottom - under animal details. Click quick buttons offer the most common options. Use the drop-down list to choose from the full menu. Animal details, services, and 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.



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."

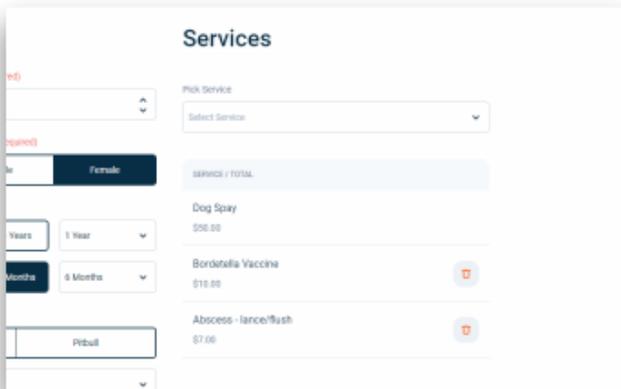


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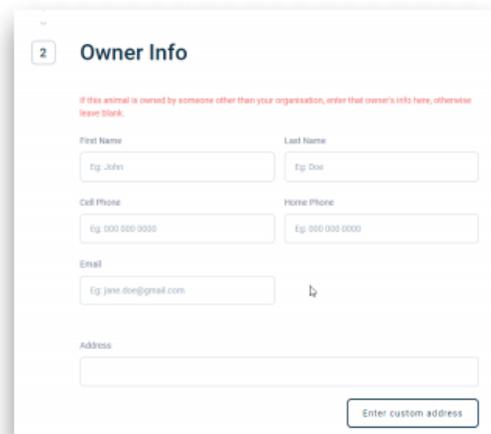
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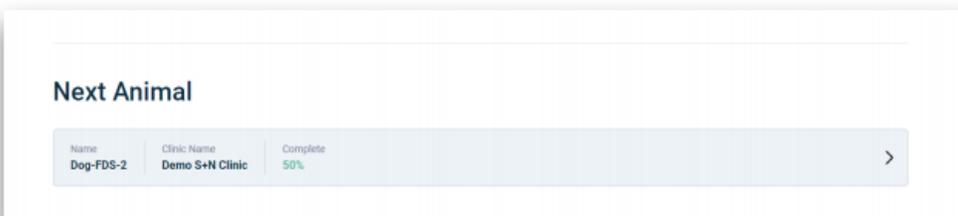
12. Add Services. Choose what the animal needs during the visit from the drop-down menu. It will be added to the requested services list.



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.



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.



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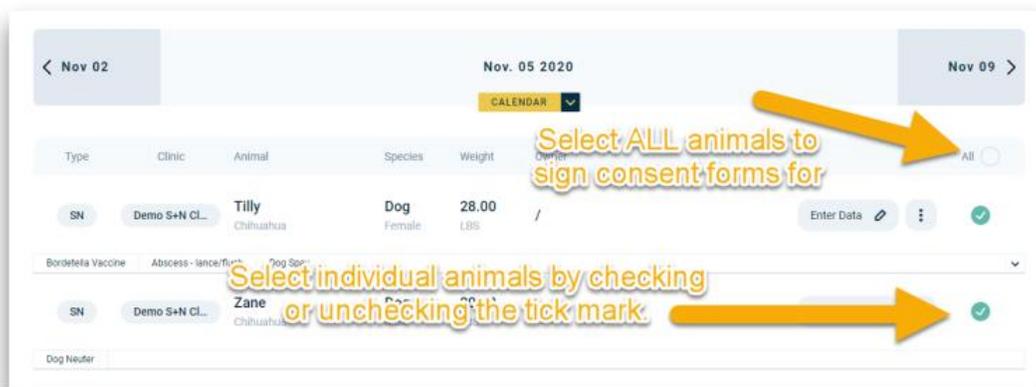
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How to sign consent forms

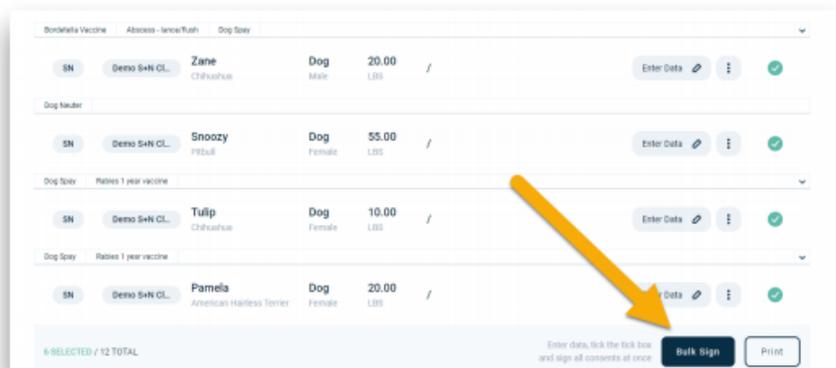
Consent forms are the documents we require in order to be able to perform surgery on your animals. We need one signed consent form per animal. HQ has automated the signing of consent forms.

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.



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



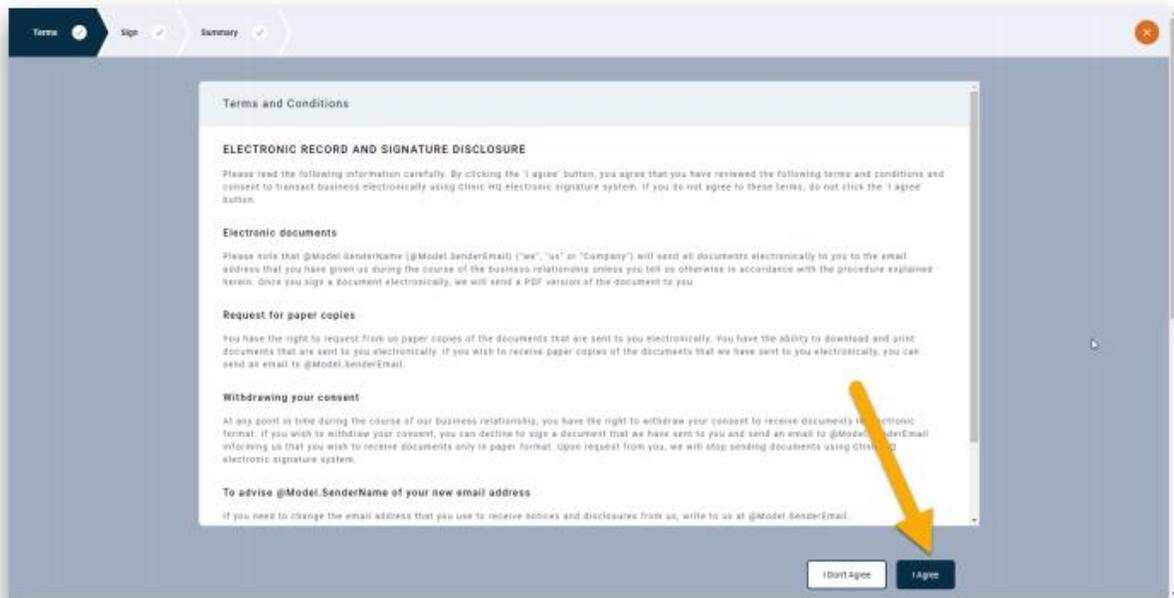
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17. You'll then be shown the terms of agreement for signing digitally. Click I Agree.



The screenshot shows a web interface for signing consent forms. At the top, there are navigation tabs: 'Forms', 'Sign', and 'Summary'. The 'Sign' tab is active. Below the navigation 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.

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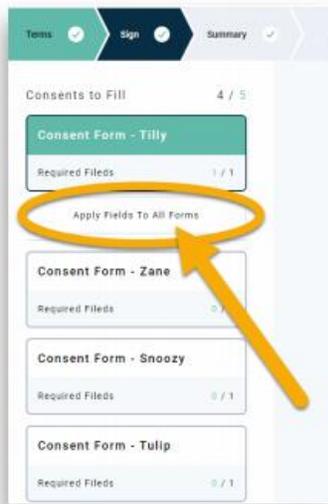
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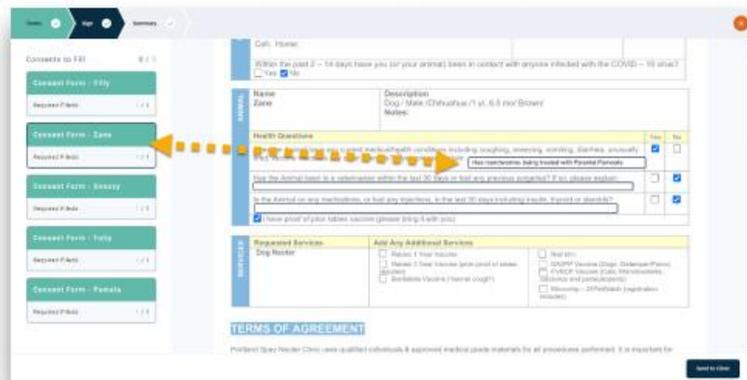
18. Fill in any tick boxes, or text boxes required. Sign the form. It can be signed on any device.



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.



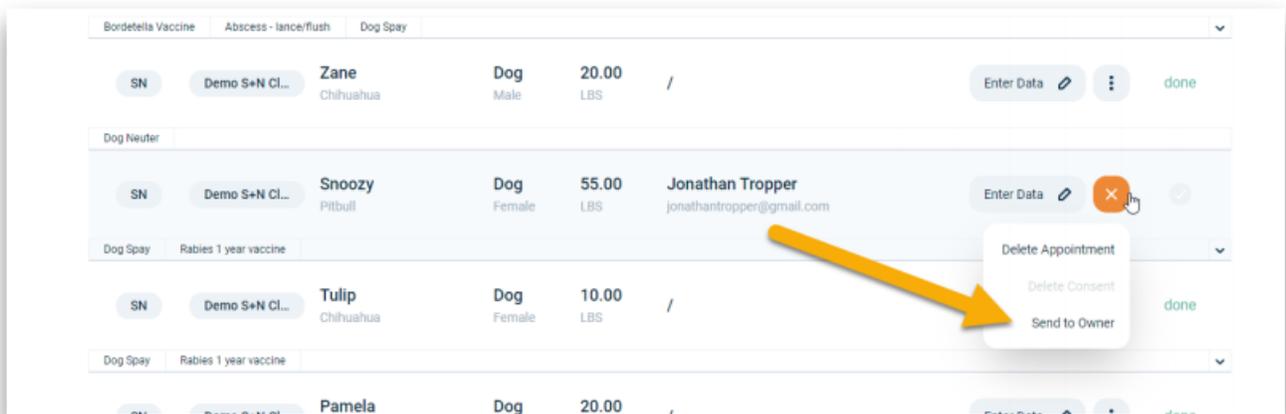
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Sending consent form to owners

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.

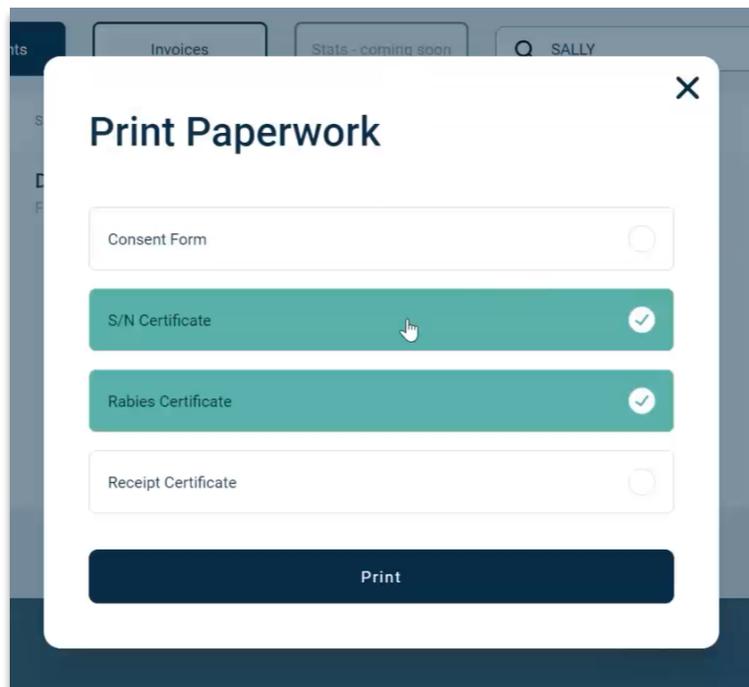
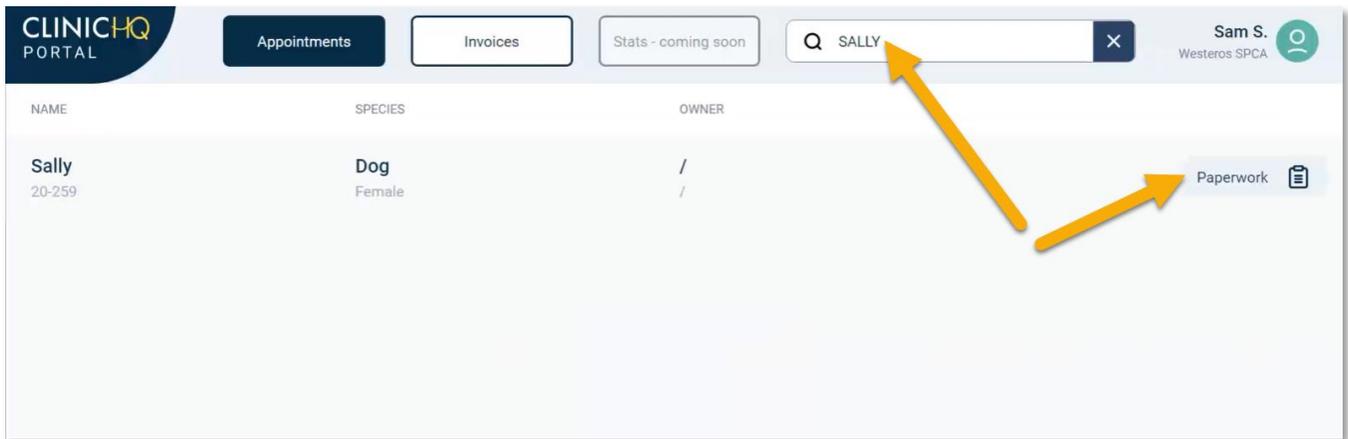
Click the three dots beside 'enter data' and select "Send to Owner." If this button is clicked, it will send the consent form to the email in the Owner section for the owner to sign.



COOL PARTS OF THE PORTAL

The "Search Animals" Section

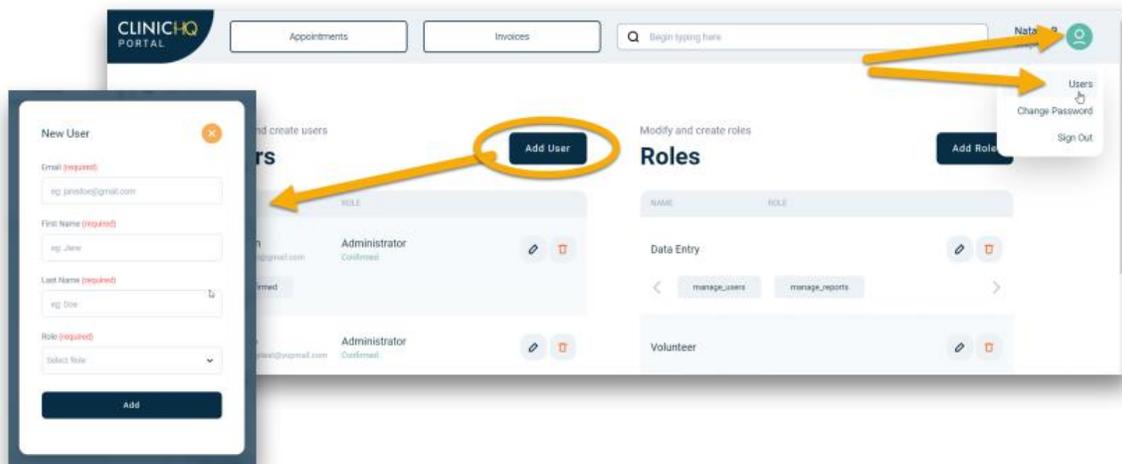
You can search animals by Owner's name, Animal name or ID, Microchip number or Rabies Tag and print all paperwork related to the animal.



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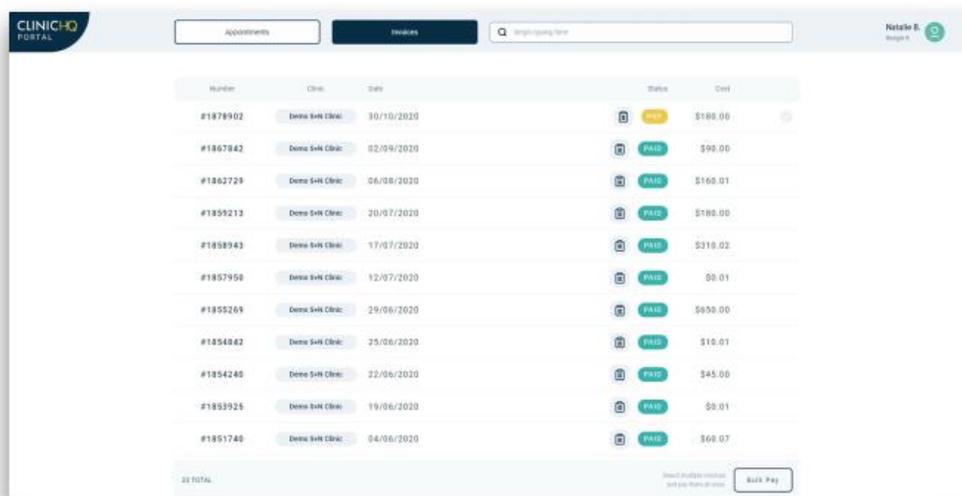
User Management

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. 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>.