



**GUIDE**  
**2023**

**VOLUME CLIENT PORTAL**

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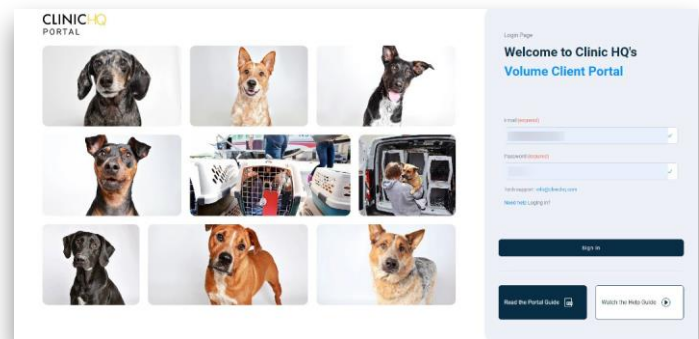


# WHAT IS THE PORTAL?

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 keep up with their scheduled appointments and/or transports, view invoices, view stats about the animals they have taken to the clinic and print records.

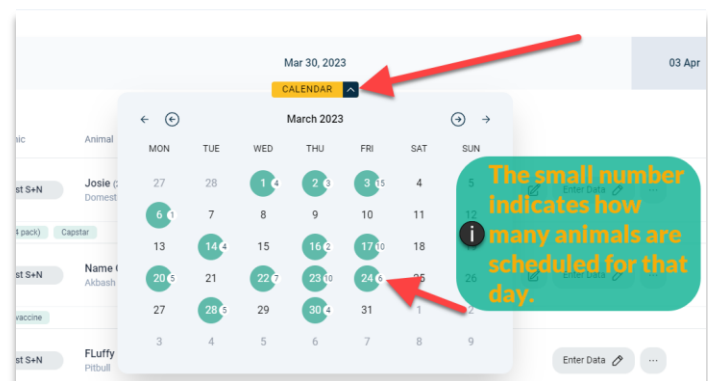
## Login

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



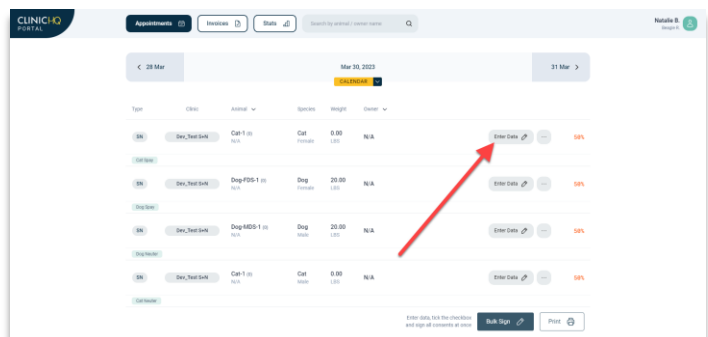
## View Calendar

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.



## 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 allow your organization to pull a report using the filters on the animals taken to the clinic. Custom Fields can be created and used to further report on.

## Print Paperwork

Print rabies and spay/neuter certificates for every animal. Search by animal name or owner name to find their paperwork. Or go to the day and click the three dots beside the animal.

## 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.



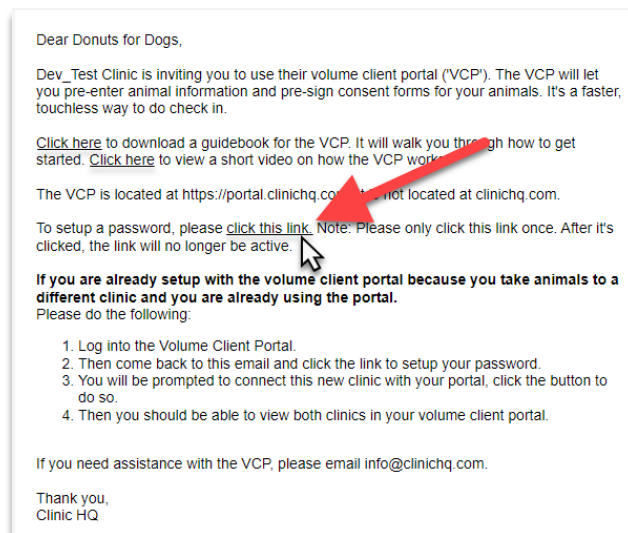
# STEP BY STEP GUIDE

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

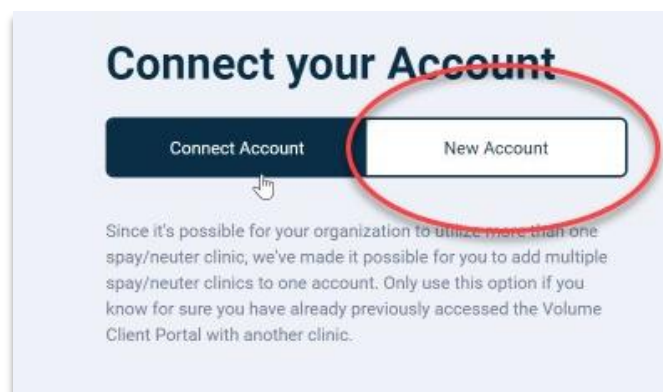
## How to login

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 an account. 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 the “link” to establish your credentials.



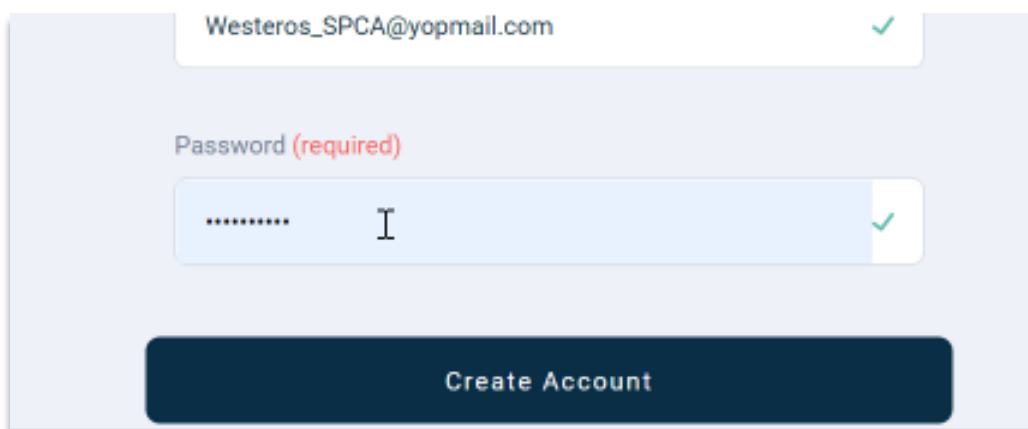
2. Click the “New Account” button. Unless your organization takes animals to multiple spay / neuter clinics, and you already have a Portal account with another clinic. In this case you will need to “Connect Account.” Follow the instruction for how to connect another clinic to your existing Portal.



**\*If you are already setup with the volume client portal because you take animals to a different clinic and you are already using the portal.**

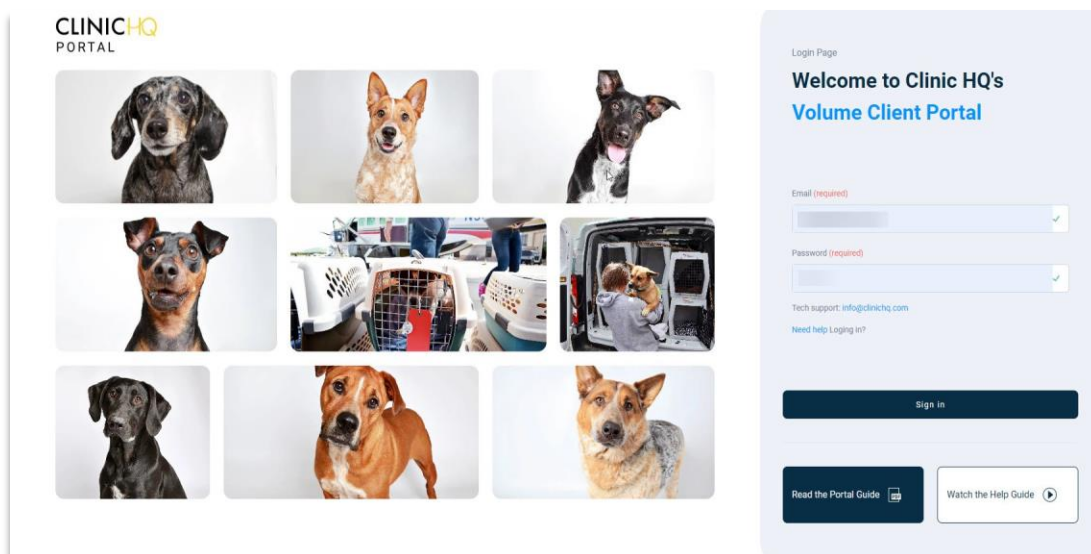
Please do the following:

- 1) Log into the Volume Client Portal.
  - 2) Then come back to the email and click the link to setup your password.
  - 3) You will be prompted to connect this new clinic with your portal, click the button to do so.
  - 4) Then you should be able to view both clinics in your volume client portal.
3. Enter name, organizational name, email, and password and click **“Create Account”** button. Strong passwords should be at least eight characters long and contain a special symbol (!@.)



A screenshot of a web form for creating an account. 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 eight asterisks and a cursor. To the right of the password field is a green checkmark icon. 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. Type in your email address into the Email field, and your password into the password field.

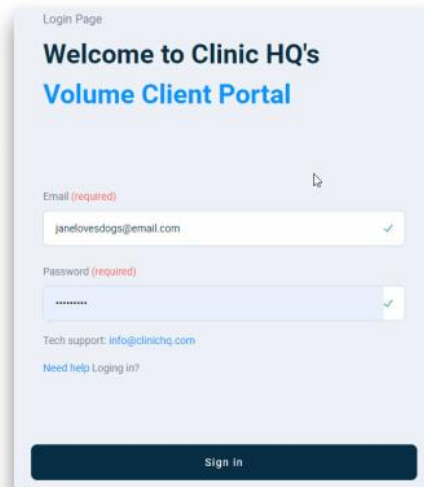


A screenshot of the ClinicHQ Portal login page. On the left side, there is a grid of nine images: six individual dogs (three black and white, two brown and white, and one black) and three images showing dogs in a veterinary setting (one in a cage, one in a car, and one being held by a person). The text "CLINIC HQ PORTAL" is at the top left. On the right side, there is a login form titled "Login Page" and "Welcome to Clinic HQ's Volume Client Portal". The form has two input fields: "Email (required)" and "Password (required)", both with green checkmark icons to their right. Below the password field, there is a link "Tech support: info@clinichq.com" and a link "Need help Logging in?". At the bottom of the form is a dark blue button labeled "Sign in". Below the "Sign in" button are two buttons: "Read the Portal Guide" with a document icon and "Watch the Help Guide" with a play button icon.

## 5. Forgot your password?

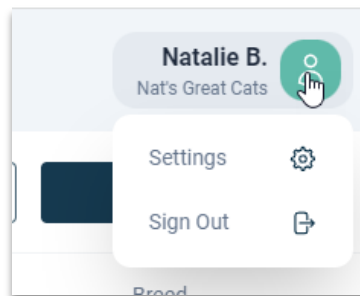
Click the **Need help Logging In?** link at <https://portal.clinichq.com> and an email will be sent to you to setup a new password

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).

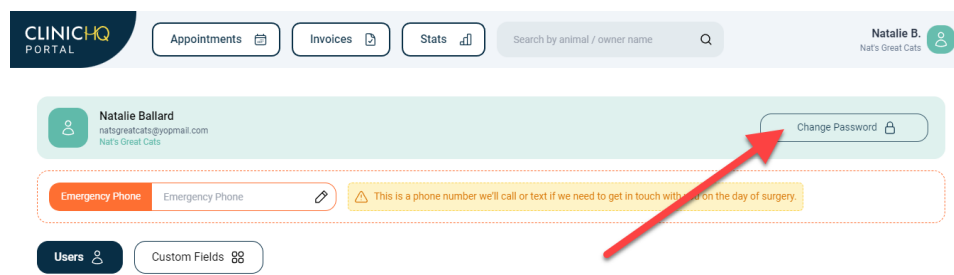


The screenshot shows the 'Login Page' for 'Clinic HQ's Volume Client Portal'. It features a 'Welcome to Clinic HQ's Volume Client Portal' header. Below the header are two input fields: 'Email (required)' with the value 'janelovesdogs@email.com' and a checkmark, and 'Password (required)' with a masked password '\*\*\*\*\*' and a checkmark. There is a 'Tech support: info@clinichq.com' link and a 'Need help? Logging in?' link. At the bottom is a dark blue 'Sign In' button.

6. To change your password, click the person icon in the upper right corner, select **Settings**. Here is also where you logout.



From this page, click **Change Password** and follow the prompts.

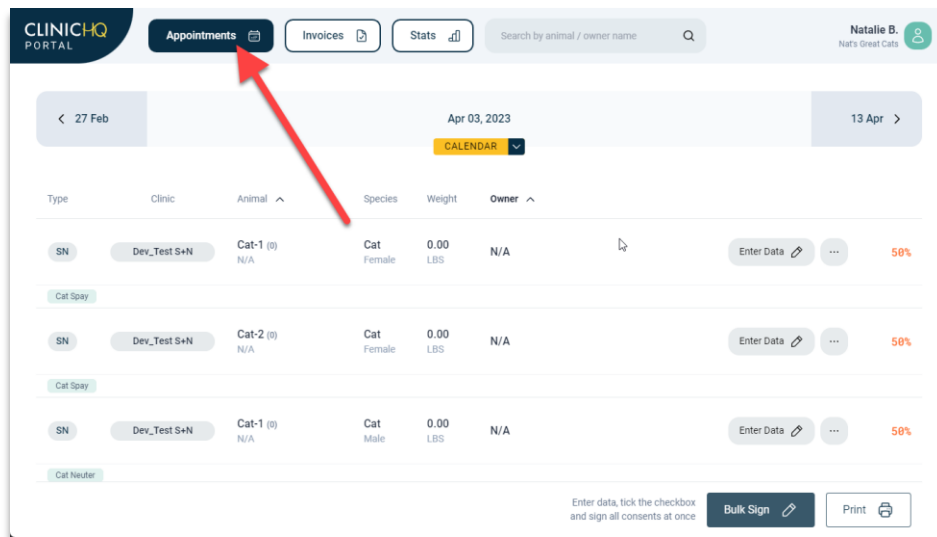


The screenshot shows the 'CLINIC HQ PORTAL' dashboard. The top navigation bar includes 'Appointments', 'Invoices', 'Stats', and a search bar. The user profile 'Natalie B. Nat's Great Cats' is in the top right. Below the navigation bar, there is a section for 'Natalie Ballard' with a 'Change Password' button. A red arrow points to the 'Change Password' button. Below this is an 'Emergency Phone' field with a warning message: 'This is a phone number we'll call or text if we need to get in touch with you on the day of surgery.' At the bottom are 'Users' and 'Custom Fields' buttons.

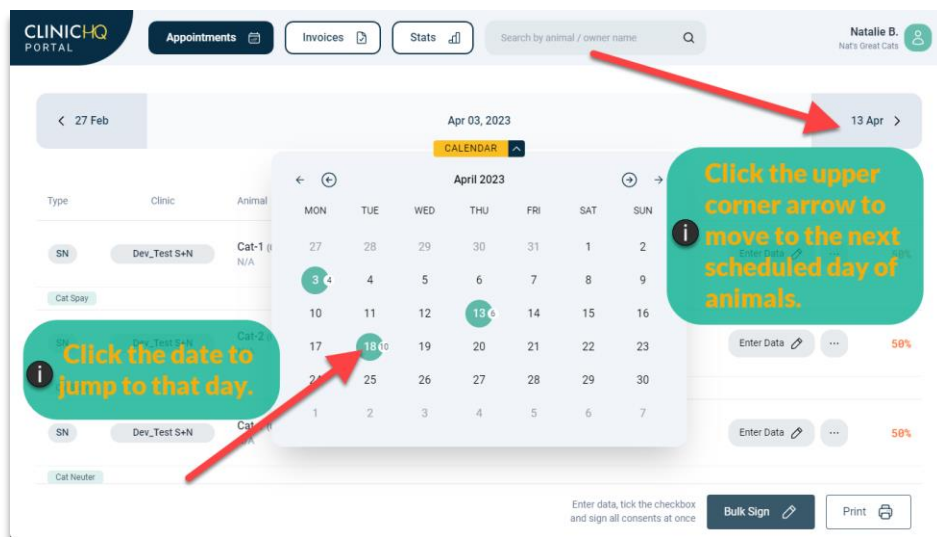
## How to Enter Data

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.

1. Click **Appointments** on the top of the page. If you are not already on this screen.



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





3. Click “Enter Data” button.

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.

The screenshot shows the CLINICHQ PORTAL interface. At the top, there are tabs for Appointments, Invoices, and Stats. A search bar is present with the text "Search by animal / owner name". The main area displays a calendar for April 03, 2023. Below the calendar, there is a table with columns: Type, Clinic, Animal, Species, Weight, and Owner. The table lists three animals: Cat-1 (Female), Cat-2 (Female), and Cat-1 (Male). Each animal has an "Enter Data" button next to it. A red arrow points to the "Enter Data" button for Cat-1. At the bottom right, there are buttons for "Bulk Sign" and "Print".

4. On the left, enter animal info, add notes for the clinic, and enter data for any custom fields. On the right, add owner information (if there is one), services needed, upload files (such as previous vet records), make your own private notes. All details 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.

The screenshot shows the CLINICHQ PORTAL interface with the "Animal Info" and "Owner" sections. The "Animal Info" section includes fields for Animal Name (Betsy), Animal Weight (0), Animal Species (Cat), Animal Sex (Female), Animal Age (5 Months), and Animal Breed. The "Owner" section includes fields for Owner Name, Services, Files, and VCP Note. A pop-up message at the bottom right says "Your changes are saved."

## 5. Add **Animal Info:**

The species, sex, and size will be filled already with the allotted appointment slots the clinic gave the organization. Click quick buttons offer the most common options. Use the drop-down list to choose from the full menu.

Tick the caution field if the staff should be careful when handling this animal.

Tick the current rabies fields to let staff know the animal is up to date.

Any important medical info like current medications or issues, enter in "Appointment Notes." These notes will be visible to the clinic.

## 6. **Custom Fields:**

Your organization may or may not have custom fields set up. Record any pertinent information into these fields if there are any.

These fields are created in Settings of your VC Portal and can be utilized in Stats. Read more about how to create custom fields further on in the manual.

**Animal Info**

Please fill all the required fields.

**Custom Fields** ✓  
Does not display to the clinic.

Trapped Location Nickname

Trapped Location Nickname

Needs to borrow carrier

Select Option

**Owner**

**Services**

**Files**  
These files will be uploaded

**VCP Note**  
This is a private note related to the animal. It will not be shared with the clinic.

## 7. Add **Owner:**

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.

An owner would be listed in cases such as if this is a transport group for public animals or your shelter/rescue has already adopted out the animal and would like the adopter to be listed. The contact information will be required when entering an owner. If the consent form should be signed by the owner, an email address will be very beneficial to send the consent form to the owner for signature.

## 7. Add **Services:**

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

## 8. Upload **Files:**

Click the **Upload** button to attach a file from your computer/device.

Any documents or images uploaded through the VCP will be available to the clinic. Common files to upload may include previous medical records.

## 9. VCP Note

This is a private note related to the appointment. It will not be shared with the clinic or the owner.

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

### Next Animal

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

Once all appointment data has been entered, navigate back to the Appointment list. Here is how to understand the indicators on the schedule.

- 1 Next to the animal's name will be the clinic's unique animal ID number. This number is "0" until assigned by the clinic at check in.
- 2 There are notes on this appointment. Click the pencil/paper icon to read the note.
- 3 The three dots action menu. View paperwork if the animal has been seen by the clinic, manage consent forms.
- 4 Red dot indicates this animal was flagged with a caution.
- 5 VCPD stamp = Volume Client Portal Document. A file was uploaded for this animal.
- 6 Greyed out check mark = No action has happened with the consent form. Select and Bulk Sign or send to owner.

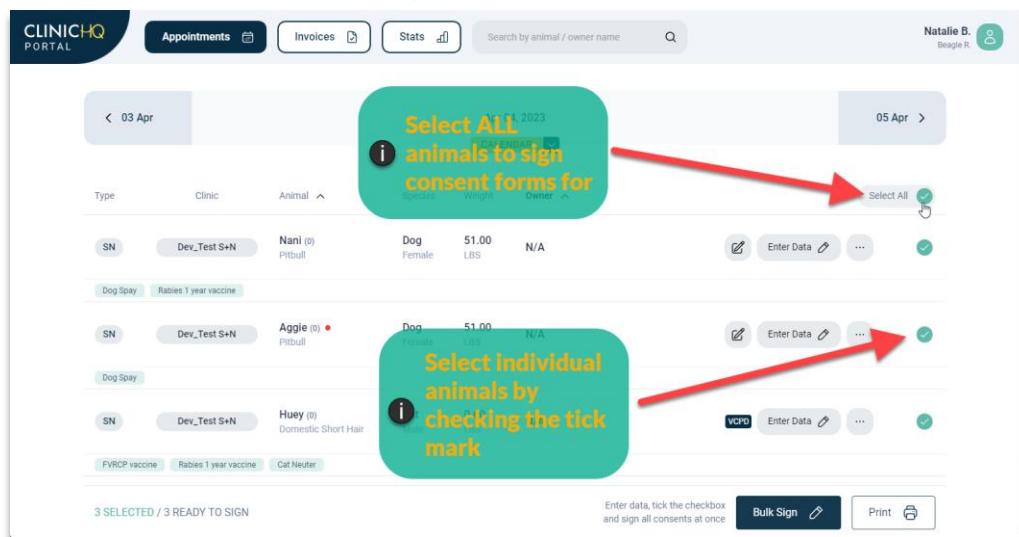
Type	Clinic	Animal	Species	Weight	Owner		Select All
SN	Dev_Test S+N	Opal (23-287) Domestic Short Hair	Cat Female	3.90 LBS	Tonya Barton tonyaemail@email.com	Enter Data	N/A
Cat Spay	Feline Distemper	Rabies 1 year vaccine	Microchip	Dewormer, Cat			
SN	Dev_Test S+N	Nani (0) Pitbull	Dog Female	51.00 LBS	N/A	Enter Data	
Dog Spay	Rabies 1 year vaccine						
SN	Dev_Test S+N	Aggie (0) Pitbull	Dog Female	51.00 LBS	N/A	Enter Data	
Dog Spay							
SN	Dev_Test S+N	Huey (0) Domestic Short Hair	Cat Male	0.00 LBS	N/A	VCPD  Enter Data	
FVRCP vaccine	Rabies 1 year vaccine	Cat Neuter					

## How to sign consent forms

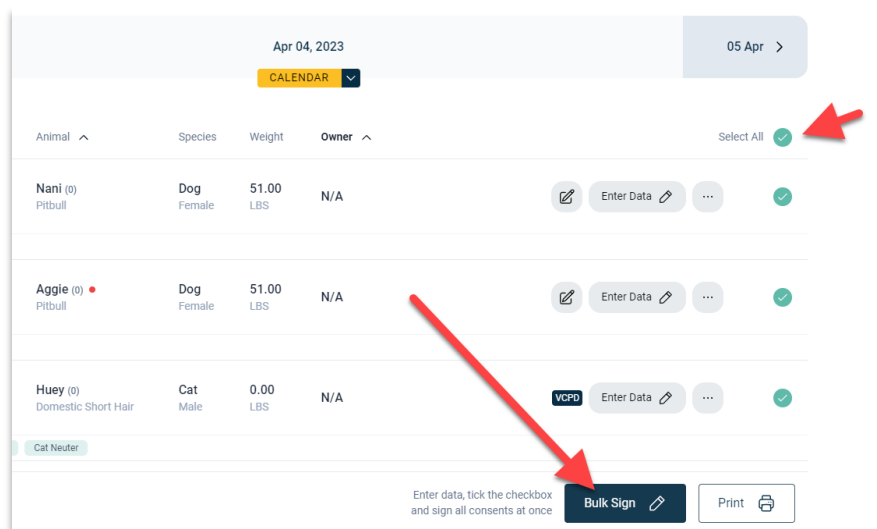
Consent forms are the documents we require in order to be able to perform surgery on your animals. We need one signed consent form per animal. HQ has automated the signing of consent forms.

11. 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.



12. Then select '**Bulk Sign**' at the bottom of the screen.



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

**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 Dev\_Test S+N (gclmmer@clinchq.com) ("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 gclmmer@clinchq.com.

**Withdrawing your consent**

At any point in time during the course of our business relationship, you have the right to withdraw your consent to

**I Agree**

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

**Consents to Fill** 2 / 3

**Spay/Neuter Consent Form - Bambi**  
Required Fields 1 / 1  
Apply Fields To All Forms

**Spay/Neuter Consent Form - Ariel**  
Required Fields 0 / 1


**Spay/Neuter Consent Form - Cinderella**  
Required Fields 0 / 1

I agree that "CLINIC NAME" & "CLINIC NAME" Parties may take, or permit others to take, photographs or video of me &/or my animal, while at "CLINIC NAME" & that "CLINIC NAME" & "CLINIC NAME" Parties may use or authorize the use of the photographs or video of me &/or my animal in any way it deems appropriate to support the clinic's mission, including fundraising purposes.

I HEREBY WARRANT THAT I (A) AM AT LEAST EIGHTEEN (18) YEARS OF AGE & THE AGE OF MAJORITY IN THE STATE IN WHICH I RESIDE, (B) HAVE READ THIS AGREEMENT CAREFULLY PRIOR TO ITS EXECUTION, (C) FULLY UNDERSTAND THE CONTENTS OF THIS AGREEMENT, (D) REALIZE THIS AGREEMENT IS AN ENFORCEABLE LEGAL DOCUMENT BETWEEN MYSELF & "CLINIC NAME", & (E) VOLUNTARILY SIGN THIS AGREEMENT OF MY OWN FREE WILL.

THE ANIMAL WILL RECEIVE A SMALL TATTOO ON HIS/HER UNDERSIDE TO SHOW THAT HE/SHE HAS BEEN STERILIZED.

BY SIGNING BELOW, I ACKNOWLEDGE THAT I HAVE READ, UNDERSTOOD, & AGREE TO THE TERMS IN THIS AGREEMENT.

SIGNATURE OF OWNER OR AUTHORIZED AGENT:   
DATE:

**Guide Me**

15. 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.

**Consents to Fill** 2 / 3

**Spay/Neuter Consent Form - Nani**  
Required Fields 1 / 1  
Apply Fields To All Forms

**Spay/Neuter Consent Form - Aggie**  
Required Fields 0 / 1

**Spay/Neuter Consent Form - Huey**  
Required Fields 0 / 1

**Consents to Fill** 8 / 8

**Consent Form - Abby**  
Required Fields 1 / 1

**Consent Form - Zane**  
Required Fields 1 / 1

**Consent Form - Sassy**  
Required Fields 1 / 1

**Consent Form - Kelly**  
Required Fields 1 / 1

**Consent Form - Pamela**  
Required Fields 1 / 1

**Call: Hester**  
Within the past 2 - 14 days have you (or your animal) been in contact with anyone infected with the COVID-19 virus?  
☐ Yes ☒ No

**Name:** Zane  
**Description:** Dog / Male (Chihuahua / 7 y, 6.5 lbs / Brown)

**Health Questions**

Question	Yes	No
Has your animal been treated with any antibiotics in the last 30 days?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Has your animal been treated with any painkillers in the last 30 days?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Has your animal been treated with any steroids in the last 30 days?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Has your animal been treated with any chemotherapy in the last 30 days?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Has your animal been treated with any radiation in the last 30 days?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Has your animal been treated with any surgery in the last 30 days?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Has your animal been treated with any other medical treatment in the last 30 days?	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Requested Services**

Service	Requested
Spay/Neuter	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>

**Additional Services**

Service	Requested
Spay/Neuter	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>

**TERMS OF AGREEMENT**

Portland Spay/Neuter Clinic uses qualified individuals & equipment method grade materials for all procedures performed. It is important for

**Next to Clinic**



16. Once all consent forms have been filled and signed, click ‘Send to Clinic.’

The screenshot shows a web interface with a top navigation bar containing 'Terms', 'Sign', and 'Summary' tabs. The 'Summary' tab is active. On the left, a section titled 'Consents to Fill' shows 0 / 3 forms completed. Below this are three green boxes, each representing a signed consent form for 'Nani', 'Aggie', and 'Huey'. Each box indicates 'Required Fields 1 / 1'. The main area on the right contains the text of the consent agreement, including a signature of the owner and a date of '4 April, 2023'. A red arrow points from the signature area down to a blue button labeled 'Send to Clinic' at the bottom right.

**Note:** after consent forms are signed, the animal info, owner info, and services *cannot* be edited. In order to change details, you will need to delete the signed consent from the action menu (three dots) on the Appointment screen. Then, make your changes to the appointment and resign.

The screenshot shows the 'Appointments' section of the CLINIC HQ PORTAL. The top navigation bar includes 'Appointments', 'Invoices', and 'Stats' tabs. A search bar is present. The main content area shows a list of appointments for April 04, 2023. The table has columns for Type, Clinic, Animal, Species, Weight, and Owner. Three appointments are listed: Nani (Pitbull), Aggie (Pitbull), and Huey (Domestic Short Hair). Each row has an action menu with options like 'Enter Data', 'Delete Appointment', and 'Delete Consent'. A red arrow points to the 'Delete Consent' option for the Nani appointment.

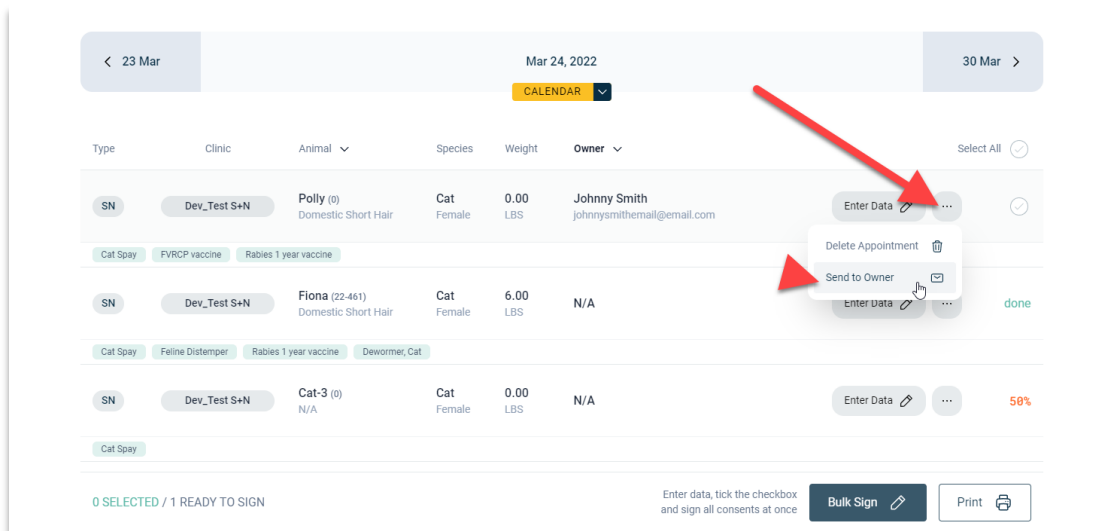
Type	Clinic	Animal	Species	Weight	Owner	Actions
SN	Dev_Test S+N	Nani (0) Pitbull	Dog Female	51.00 LBS	N/A	Enter Data, Delete Appointment, Delete Consent, done
SN	Dev_Test S+N	Aggie (0) Pitbull	Dog Female	51.00 LBS	N/A	Enter Data, Delete Appointment, Delete Consent, done
SN	Dev_Test S+N	Huey (0) Domestic Short Hair	Cat Male	0.00 LBS	N/A	VCPO, Enter Data, Delete Appointment, Delete Consent, done

## 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.

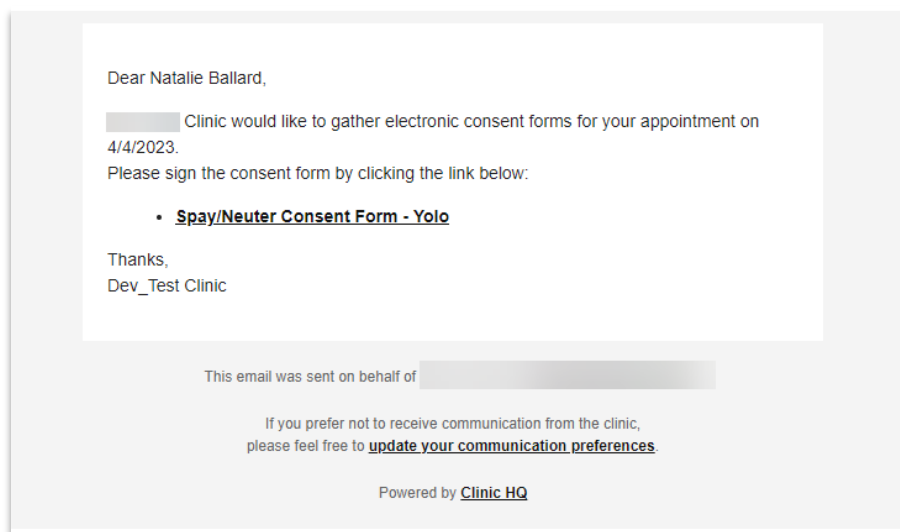
The consent status will then show as “sent.”



The screenshot shows a calendar view for March 24, 2022. A table lists appointments with columns for Type, Clinic, Animal, Species, Weight, and Owner. The first appointment is for Polly (0), a Domestic Short Hair Cat, Female, 0.00 LBS, owned by Johnny Smith (johnnyamathemail@email.com). The status is 'Enter Data' with a pencil icon and a three-dot menu. The dropdown menu is open, showing options: 'Delete Appointment' (trash icon), 'Send to Owner' (envelope icon), and 'Enter Data' (pencil icon). A red arrow points to the 'Send to Owner' option. The second appointment is for Fiona (22-461), a Domestic Short Hair Cat, Female, 6.00 LBS, with status 'N/A' and a 'done' label. The third appointment is for Cat-3 (0), a Domestic Short Hair Cat, Female, 0.00 LBS, with status 'N/A' and a '50%' label. At the bottom, there is a 'Bulk Sign' button and a 'Print' button.

Type	Clinic	Animal	Species	Weight	Owner	Status
SN	Dev_Test S+N	Polly (0) Domestic Short Hair	Cat Female	0.00 LBS	Johnny Smith johnnyamathemail@email.com	Enter Data
SN	Dev_Test S+N	Fiona (22-461) Domestic Short Hair	Cat Female	6.00 LBS	N/A	done
SN	Dev_Test S+N	Cat-3 (0) N/A	Cat Female	0.00 LBS	N/A	50%

Email sent to owner:

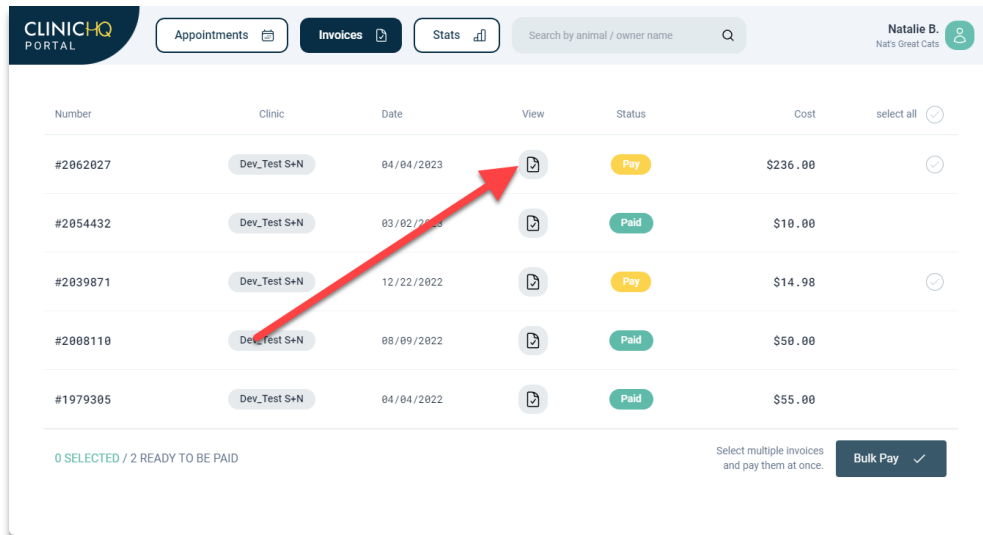


The email is addressed to Natalie Ballard. The body text reads: "Dear Natalie Ballard, [redacted] Clinic would like to gather electronic consent forms for your appointment on 4/4/2023. Please sign the consent form by clicking the link below: • [Spay/Neuter Consent Form - Yolo](#) Thanks, Dev\_Test Clinic". The footer includes "This email was sent on behalf of [redacted]", "If you prefer not to receive communication from the clinic, please feel free to [update your communication preferences](#).", and "Powered by [Clinic HQ](#)".

# COOL PARTS OF THE PORTAL

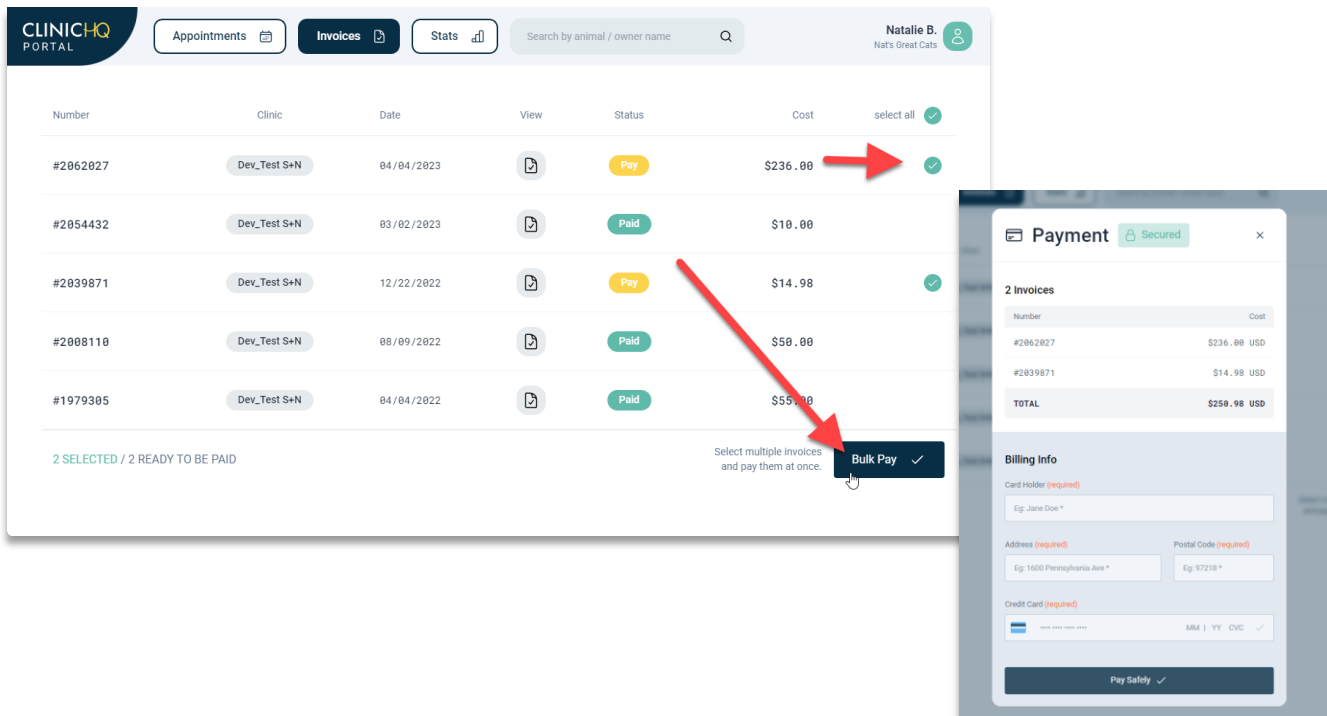
## Viewing/Paying Invoices

To view or pay invoices, go to the Invoices link on the top toolbar. View the invoice by clicking the paperwork image button.



## Paying Online

If your clinic accepts online payments, you can pay these invoices through the Portal. Select the invoice(s) by checking the tick mark next the amount or use the **Select All**. Then, click **Bulk Pay** at the bottom of the screen.



## Running the Stats

Build your own report using the filters and any custom fields that were set up. This stats page will allow you to have numbers at your fingertips! Run the stats to see how many cats or dogs have been seen at the clinic for spay/neuter appointments. Or any other multitude of combinations using the filters or custom fields.

Use the filter toggles to include that information in your search. If no filters are applied, it will pull all animal appointments.

Select the date range.

Then, click **Search**, to pull matching data.

The screenshot shows the CLINICHQ Portal interface. At the top, there are tabs for 'Appointments', 'Invoices', and 'Stats'. The 'Stats' tab is selected. Below the tabs, there is a search bar and a date range selector. The date range is set from '04 March 2023' to '04 April 2023'. On the left side, there is a 'Filters' section with various toggle switches for 'Appointment Type' (Spay/Neuter, Recheck, Wellness), 'Sex' (Male, Female), 'Species' (Dog, Cat), and 'Custom Fields' (Trapped Location Nickname, Needs to borrow carrier). A table of animal appointments is displayed in the center. The table has columns for Type, Clinic Name, Animal Name, Animal Number, Species, Sex, Breed, Weight, Owner, and Trapped Location Nickname. A red arrow points to the 'Filters' section, and another red arrow points to the 'Search' button. The 'Export' button is also visible.

Type	Clinic Name	Animal Name	Animal Number	Species	Sex	Breed	Weight	Owner	Trapped Location Nickname
SN	Dev_Test S+H	Stormy	23-251	Cat	Male	Domestic Long Hair	6 lbs	Igor Shaldev	N/A
SN	Dev_Test S+H	Sunny	23-250	Cat	Male	American Bobtail	4.2 lbs		N/A
SN	Dev_Test S+H	Cloud	23-252	Cat	Male	Domestic Short Hair	6 lbs		N/A
SN	Dev_Test S+H	Josie	23-279	Cat	Female	Domestic Short Hair	6.5 lbs		N/A
SN	Dev_Test S+H	Fluffy	23-292	Cat	Male	Domestic Short Hair	20 lbs		Red River Subdivision
SN	Dev_Test S+H	Leaf	23-283	Cat	Male	Domestic Short Hair	5 lbs	Natalie Ballard	N/A
SN	Dev_Test S+H	Opal	23-287	Cat	Female	Domestic Short Hair	3.9 lbs	Tonya Barton	N/A

Total: 7 Appointments

Generate reports and export them to Excel spreadsheets by clicking **Export**.

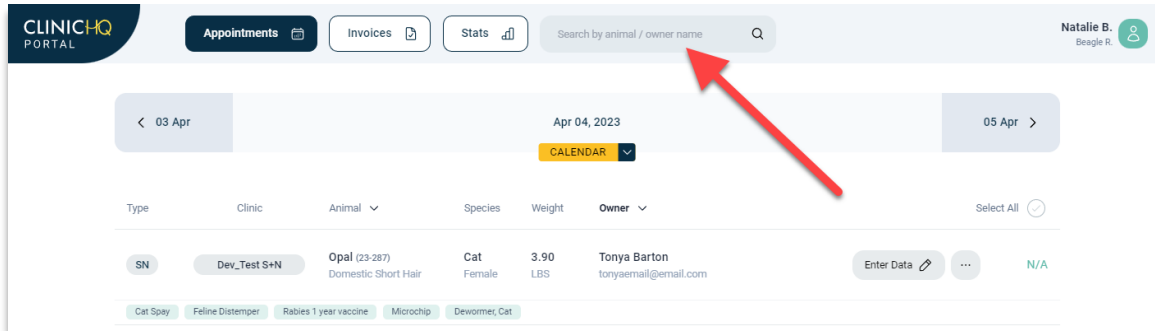
The screenshot shows a table of animal appointments. The table has columns for Animal Name, Animal Number, Species, Sex, Breed, and Weight. A red arrow points to the 'Export' button. The 'Search' button is also visible.

Animal Name	Animal Number	Species	Sex	Breed	Weight
Jinay	23-190	Dog	Female	Affenpinscher	55 lbs
Sam	23-209	Dog	Female	Chihuahua	20 lbs
Mia	23-212	Dog	Female	Chihuahua	10 lbs
Sally	23-213	Dog	Female	Pitbull	39 lbs
Georgia	23-214	Dog	Female	Pitbull	42 lbs
Noosa	23-215	Dog	Female	Pekingese	23 lbs

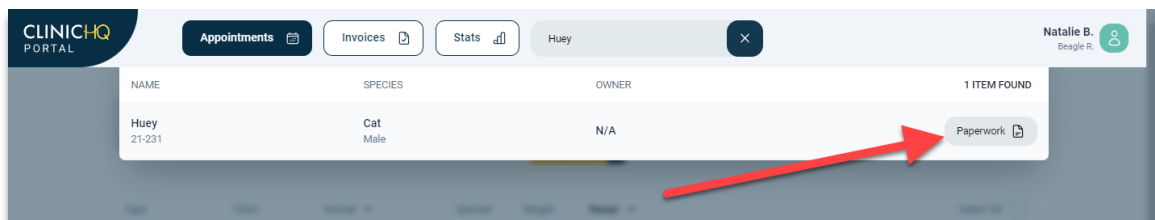
## Access Paperwork/Records

There are two ways to access the paperwork from animals seen at the clinic.

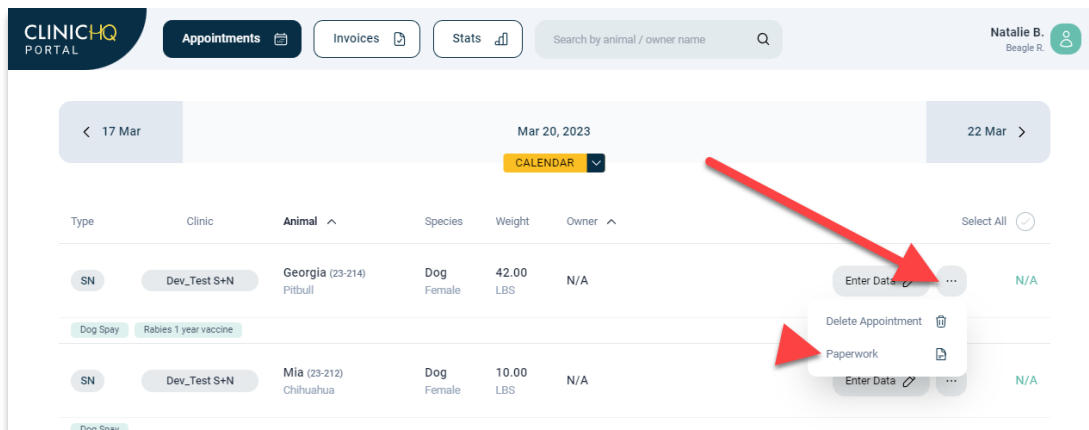
1. You can use **Search** to lookup by Owner's name, Animal name, or Clinic ID number. Begin typing to pull results.



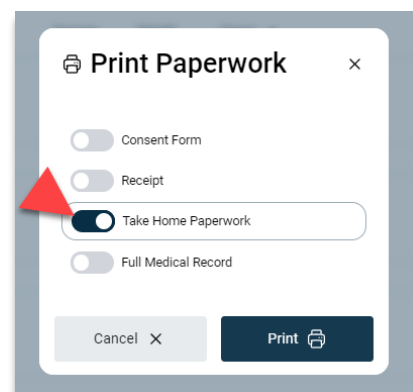
Once found via Search, there will be a **Paperwork** button.



2. Go to the **Appointments** screen. Select the date from the Calendar. Click the three dots (action menu) for the animal's appointment. Choose **Paperwork**



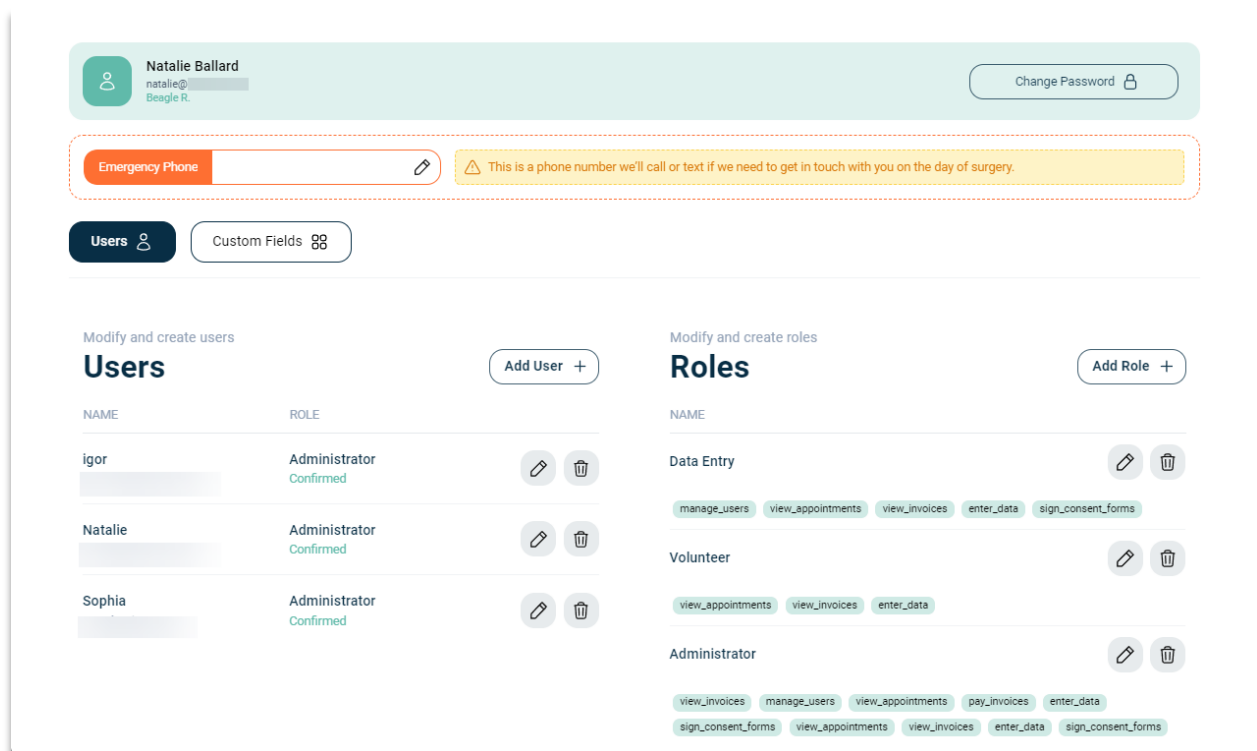
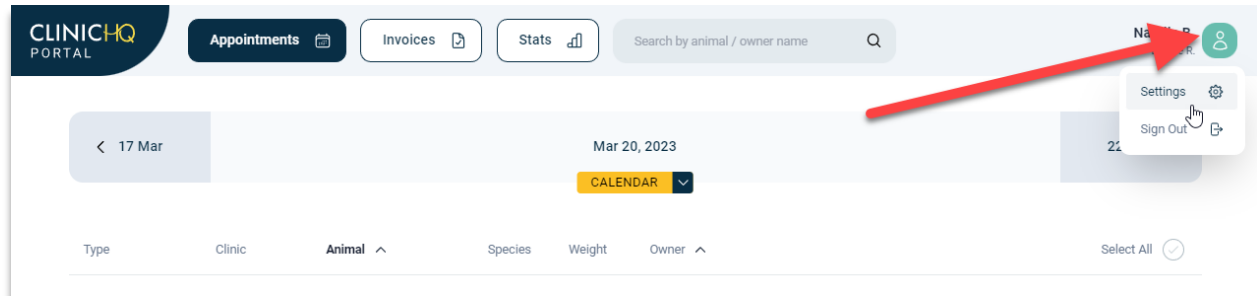
From the popup, use the toggle switch to select the paperwork to print. When you click **Print**, it will open or download the template as a PDF.





# SETTINGS

Access Settings by clicking the profile button.



*Note:* Be sure to set the organization's Emergency Phone number.

This number will be displayed to the clinic.

Should the clinic need to reach out, this would be the best point of contact within the organization that can make decisions or answer questions about animals.

# User Management

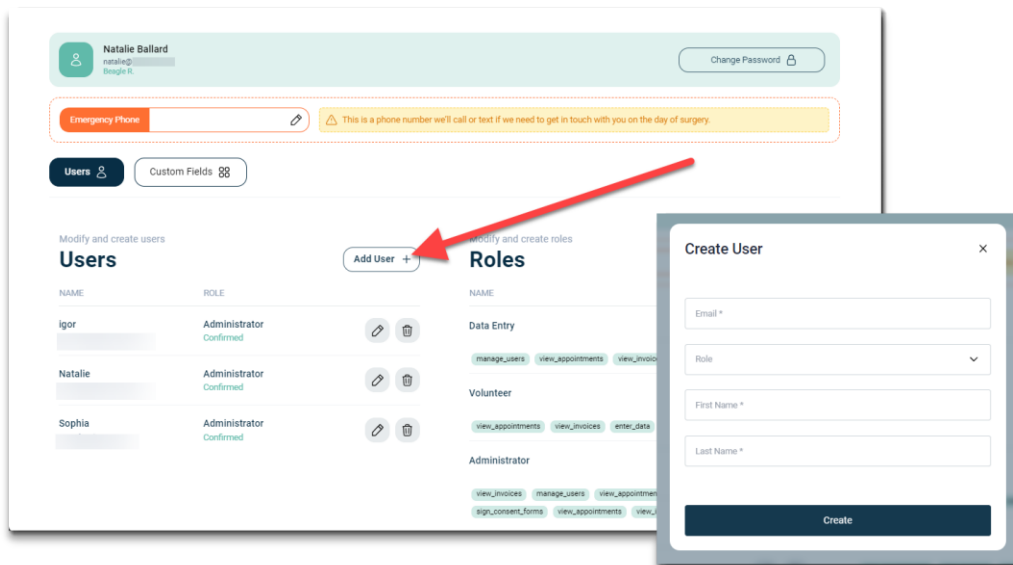
Volume clients control their own users. Each volume client can add or delete users as necessary. They can even setup "Roles" for users which lets certain users do certain things.

## Adding Users

To set up a new user, go to person icon (upper right). Then click **Settings**.

Click **Add User** and fill in the details with their email, role, first, and last name. **"Create"** to send the email invite for setting up their login password.

It is recommended to have two admin users for a Volume Client Portal.

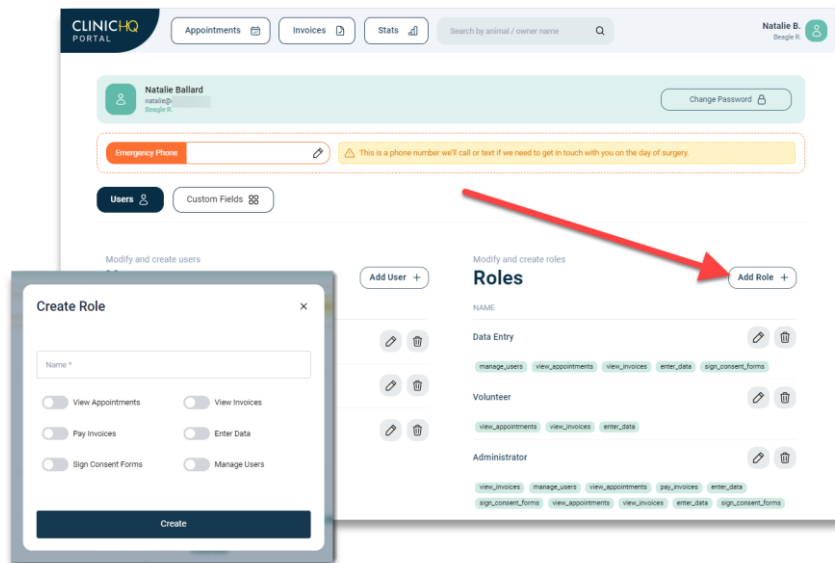


## User Roles

Limit what different users in the Portal can do by creating User Roles.

To set up a new user, go to person icon (upper right). Then click **Settings**.

Click **Add Role**. From the popup give the role a name and toggle the permissions on that this role should be allowed access to.



## Creating Custom Fields

A custom field is a way to collect additional information for your appointments. The custom fields created will not be visible to the clinic but allow for additional information to be gathered. These are for the organization's private use only and can be used in reporting through Stats.

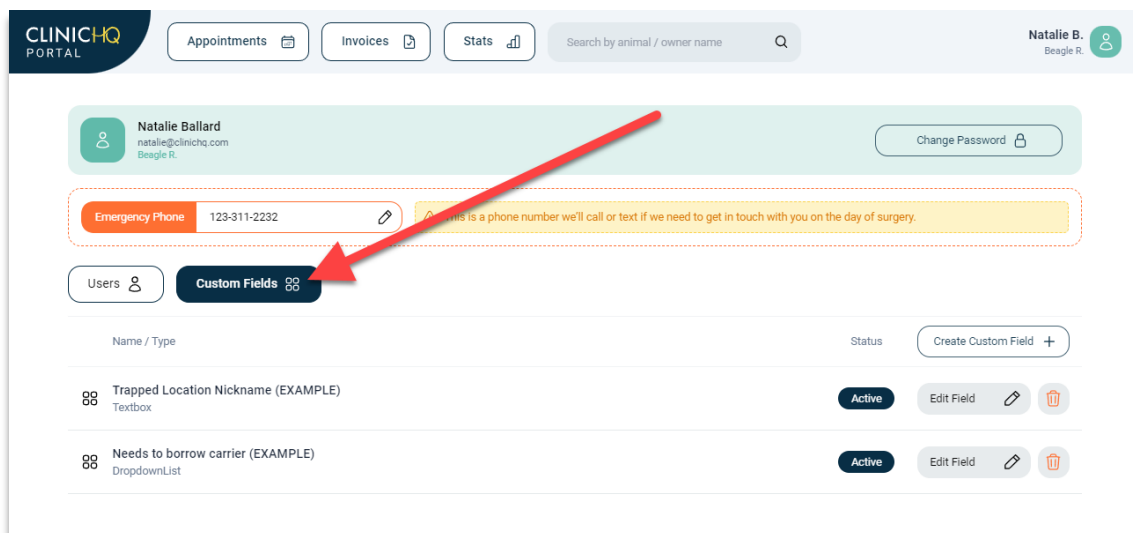
Example fields may include:

- Who the foster parent is and their contact information. Note: A foster parent would not be the same as an Owner.
- Perhaps you need a field for collecting data on whether a pet owner needed financial assistance.
- A custom field to record the carrier size needed for transport.

To setup a custom field, go to **Settings**.

Click the **Custom Fields** button in the center of the page.

From here, click **Create Custom Field**.

A screenshot of the 'Create Custom Field' modal form. It contains the following fields: 'Field Name \*' (text input), 'Status (required)' (dropdown menu with 'Active' selected), a 'Required' toggle switch, 'Field Type' (dropdown menu), 'Appointment Type' (dropdown menu), 'Field Description \*' (text input), and 'Display Order (required)' (input with a checkmark icon and the value '0'). At the bottom right, there are 'Cancel' and 'Create Field' buttons.

Fill in each required part of the field setup. We will create an example to follow.

Field Name = the title of the field. *In this example it would be “In foster care?”*

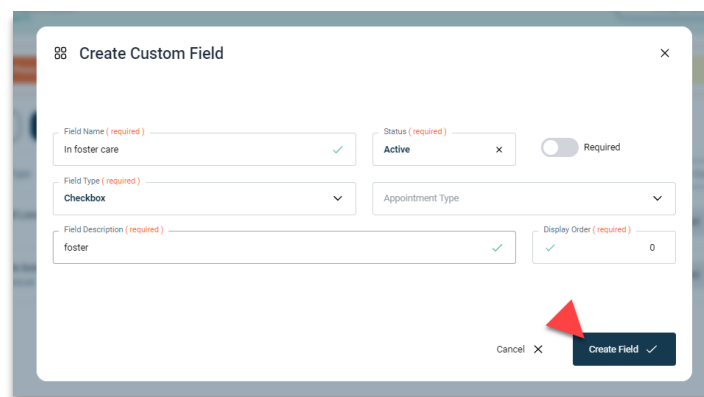
Field Type = how will the response be collected. *Example checkbox.*

Field Description = this should be a one- or two-word summary of the name. *Here we put “foster.”*  
Required = toggle will make the response required for all appointments. *In this example we do not want it required.*

Appointment type = should this field only be limited to Spay/Neuter, Wellness or Rechecks only?

Display order = where it sits in the appointment Edit Data screen relative to the other fields you have created.

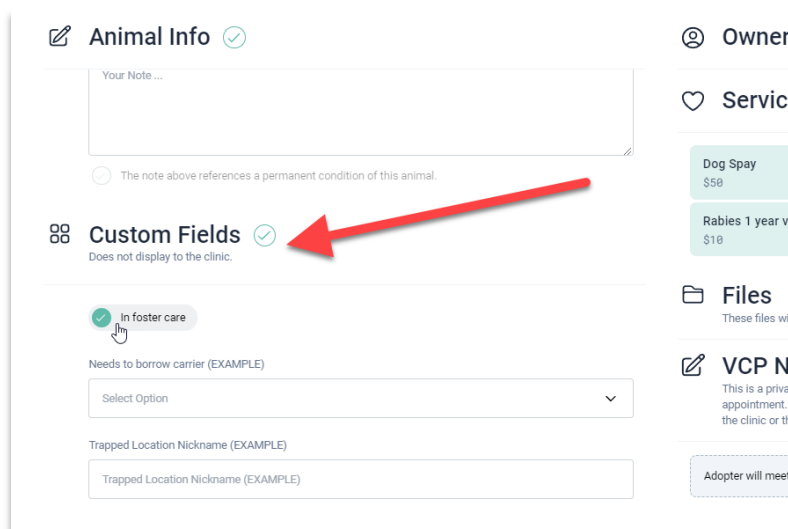
Click **Create Field**



The screenshot shows a 'Create Custom Field' dialog box with the following fields:

- Field Name (required): In foster care ✓
- Status (required): Active x
- Field Type (required): Checkbox ✓
- Appointment Type: (empty dropdown)
- Field Description (required): foster ✓
- Display Order (required): 0 ✓
- Required: (toggle switch, currently off)
- Buttons: Cancel X, Create Field ✓

Here in the Enter Data area of an animal's appointment we can see the custom fields created.



The screenshot shows the 'Animal Info' form with the following sections:

- Animal Info ✓
- Your Note ...
- The note above references a permanent condition of this animal.
- Custom Fields ✓ (indicated by a red arrow)
- Does not display to the clinic.
- In foster care ✓ (checkbox)
- Needs to borrow carrier (EXAMPLE)
- Select Option (dropdown)
- Trapped Location Nickname (EXAMPLE)
- Trapped Location Nickname (EXAMPLE) (text input)

On the right side, there are sections for Owner, Service, Files, and VCP No.

# TECHNICAL ASSISTANCE

## Email

If you are having an issue and need technical support with the Volume Client Portal, email [vcp@clinichq.com](mailto:vcp@clinichq.com). Be sure to include the following:

- your organization's name.
- the name of the clinic your you take animals to.
- a phone number where you can be reached.
- 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 have created a four-minute video about how the volume client portal works. It is accessible at <https://portal.clinichq.com>.