

HANNAHWARE MEMBER SERVICES

Hannah Pet Hospital
October 2022



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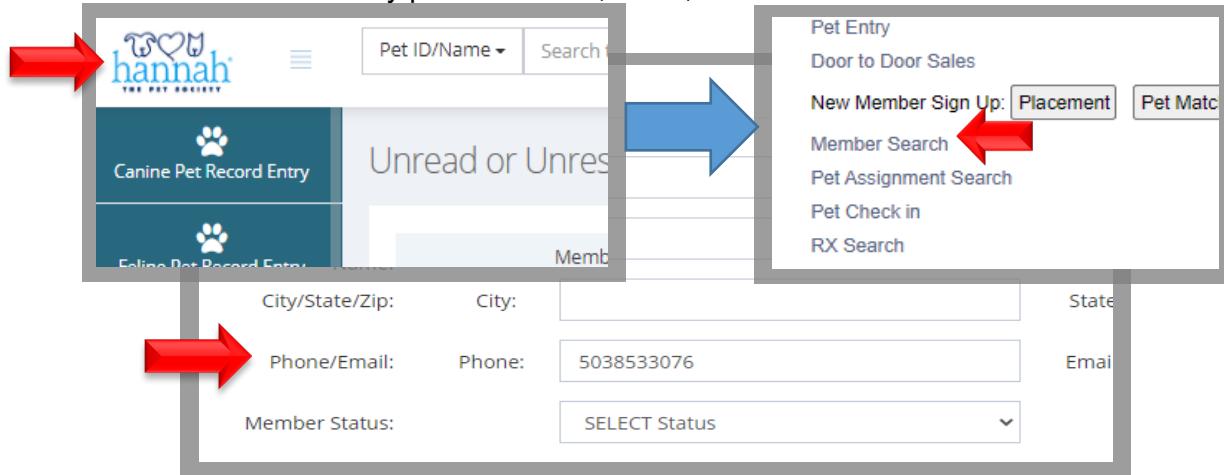
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PET MEDICAL RECORD

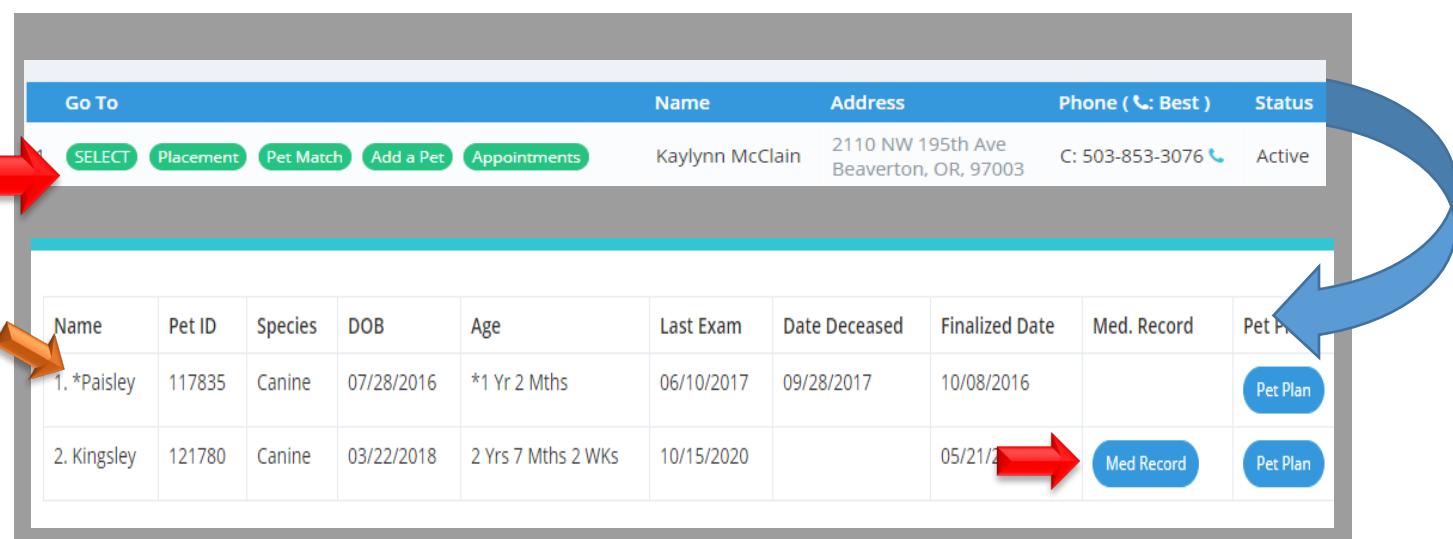
Search Member

1. Login to Hannahware → go to Home Screen by clicking the Hannah logo → Member Search
2. Search for Member by phone number, email, or name



HINTS: The easiest way to find a Member is to search by their phone number.
To search by name, it is only necessary to enter the first few letters of first name and last name.

3. Choose “select” to open the Member’s profile → select “Med Record”



Go To		Name	Address	Phone (C: Best)	Status
SELECT	Placement	Kaylynn McClain	2110 NW 195th Ave Beaverton, OR, 97003	C: 503-853-3076	Active
<hr/>					
Name	Pet ID	Species	DOB	Age	Last Exam
1. *Paisley	117835	Canine	07/28/2016	*1 Yr 2 Mths	06/10/2017
2. Kingsley	121780	Canine	03/22/2018	2 Yrs 7 Mths 2 Wks	10/15/2020
Finalized Date	Med. Record	Pet Plan			
05/21/2020	Med Record	Pet Plan			

NOTE: Deceased Pets are identified by an asterisk (*) next to Pet’s name.

4. The Pet and Member information is listed along the top of the medical record. The background color will change depending on the Pet’s gender and spay/neuter status.
 - a. Dark Blue = Unaltered Male
 - b. Light Blue = Neutered Male
 - c. Dark Pink = Unaltered Female
 - d. Light Pink = Spayed Female



e. Yellow: Provisional TLC

A screenshot of a pet record detail page. At the top, there are several tabs: "Check in" (highlighted with a red arrow), "Unresolved Findings", "Physical Exam", "New Findings", "Diagnostic Tests", "Medications", "Preventative Care", "Plan", "Follow Up", "Visit Summary", "Pet Death", and "Actions". The main content area shows pet information: Kingsley (121780), Age: 2 Year 7 Mths (3/22/18), Australian Cattle Dog - Neutered Male, Canine, Last: 23 Days, Annual pet exam - preventative care, Other: *Paisley, Chip #1: 981020025187183, Chip #2: DVM: Joshua Horner, Reg DVM: Joshua Horner. To the right are links: Find Appointment, Hospitalized Patient Report, Outpatient Report, Reception Report.

5. The tabs along the top will take you to the different sections of the Pet's record.

Pet Check In

- Scan the Pet for microchip number.
- Note Pet's weight.
- Go to the Home Screen and click **Pet Check In**.

A screenshot of the Pet Check In screen. On the left is a sidebar with the "hannah THE PET SOCIETY" logo. The main area has a title "Hannahware" and a "Pet Entry" section. Below it is a navigation menu with the following items: New Member Sign Up, Placement, TLC, Member Search, Pet Assignment Search, Pet Check in (highlighted with a red arrow), RX Search, Read Messages, Appointment Scheduler Groups, Manage RX and DX, and User Permissions.

- Enter all of the information on the Pet Check In screen and click **Check In**:

A screenshot of the Pet Check In search form. It has a header "Pet Check in" and a "SEARCH FORM" section with a magnifying glass icon. There are four input fields: "6685" (Last Four Digits of Chip), "Carlotta" (The name of pet), "5" (Weight), and "****" (Your Pin). A "Check In" button is located to the right of the pin field.

- The Medical Data Sheet (MDS) will pop up in a print dialog box:



10/1/22, 3:37 PM

Medical Data Sheet

MEDICAL DATA SHEET



Mrs.	Francesca	Ferrucci	Phones:	360-952-1252	9520000
Salutation	First	Last	Title	Cell/Text #	Home #
1101 SE Tech Center Drive #150			Vancouver	WA	98683

Mailing Address: Street	City	State	Zip	Email
-------------------------	------	-------	-----	-------

Spouse/Partner:	Okayed to make account changes: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Salutation	First	Last	Title	Phone:

Other Contact:	Okayed to make account changes: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No						
Daryian	Ditch	Phone:	360-723-2474				
Salutation	First	Last	Title	Cell #	Home #	Work #	Email

Pet Name: Gwendolyn (1 sheet per Pet) Age: 3 Year 10 Months (11/06/18)

- Last Wt.: 0.00 lbs. Current Wt.: 10.0 lbs. Ideal Wt.: 0.00 lbs. % over Wt.:
- Previous Visits: 11/07/2020 11/06/2020
- Last Problems: No Exam; Stress inappetence
- Abnormalities for last exam:
- Last Rx: Vit B12 injection; Cerenia injection; LRS injection
- Vaccine due today:
- Vaccine not due or not usually necessary:

Reason for visit today (check box and if sick, fill in "since..." info and mark all circles that apply)

<input type="checkbox"/> I have an appointment to see the doctor	<input type="checkbox"/> Yearly Exam/Vaccines/Deworming with appointment	<input type="checkbox"/> Check-up &/or Refill with appointment	<input type="checkbox"/> Nail Trim with appointment (Appointment Required)	<input type="checkbox"/> Recheck with appointment; details: _____
<input type="checkbox"/> Urgent Care (No appointment): <input type="checkbox"/> Injury <input type="checkbox"/> Sick <input type="checkbox"/> Recheck	<input type="checkbox"/> Bad Breath/Teeth <input type="checkbox"/> Skin Masses/Lesions			
Since Last Ate: <input type="checkbox"/> < 3 hrs <input type="checkbox"/> 3-6 hrs <input type="checkbox"/> 6-15 hrs <input type="checkbox"/> 15-24 hrs <input type="checkbox"/> >24 hrs	<input type="checkbox"/> Excessive Sleeping <input type="checkbox"/> Weight Loss			
Since Last Drink: <input type="checkbox"/> < 3 hrs <input type="checkbox"/> 3-6 hrs <input type="checkbox"/> 6-15 hrs <input type="checkbox"/> 15-24 hrs <input type="checkbox"/> >24 hrs	<input type="checkbox"/> Itching/Scratching <input type="checkbox"/> Change in Appetite			
Since Last Urine: <input type="checkbox"/> < 3 hrs <input type="checkbox"/> 3-6 hrs <input type="checkbox"/> 6-15 hrs <input type="checkbox"/> 15-24 hrs <input type="checkbox"/> >24 hrs	<input type="checkbox"/> Shaking Head/Ears <input type="checkbox"/> Change in Water Consumption			
Since Last poop: <input type="checkbox"/> < 3 hrs <input type="checkbox"/> 3-6 hrs <input type="checkbox"/> 6-15 hrs <input type="checkbox"/> 15-24 hrs <input type="checkbox"/> >24 hrs	<input type="checkbox"/> Difficulty Rising <input type="checkbox"/> Trouble breathing/coughing			
Vomiting: <input type="checkbox"/> None <input type="checkbox"/> < 3 hrs <input type="checkbox"/> 3-6 hrs <input type="checkbox"/> 6-15 hrs <input type="checkbox"/> 15-24 hrs	<input type="checkbox"/> Limping <input type="checkbox"/> Scooting			
Diarrhea: <input type="checkbox"/> None <input type="checkbox"/> < 3 hrs <input type="checkbox"/> 3-6 hrs <input type="checkbox"/> 6-15 hrs <input type="checkbox"/> 15-24 hrs	Other _____			
Painful: <input type="checkbox"/> None <input type="checkbox"/> < 3 hrs <input type="checkbox"/> 3-6 hrs <input type="checkbox"/> 6-15 hrs <input type="checkbox"/> 15-24 hrs				
<input type="checkbox"/> Other injury/sickness details: _____				
<input type="checkbox"/> Behavior Concern with Appointment: _____				

Preferred Doctor: Dr. Jess Cameron Preferred Pet Practitioner: Bryanna Johnson Preferred Nurse: Bryanna Johnson

Preferred Day of Week:					Preferred Appointment Time						
					Morning (8am-12pm)	Afternoon (1pm-6pm)	Evening(6pm-9pm)				
Mon	Tue	Wed	Thur	<input checked="" type="checkbox"/> Fri	<input type="checkbox"/> Early	<input checked="" type="checkbox"/> Mid	<input type="checkbox"/> Late	<input type="checkbox"/> Early	<input type="checkbox"/> Mid	<input type="checkbox"/> Late	<input type="checkbox"/> Evening

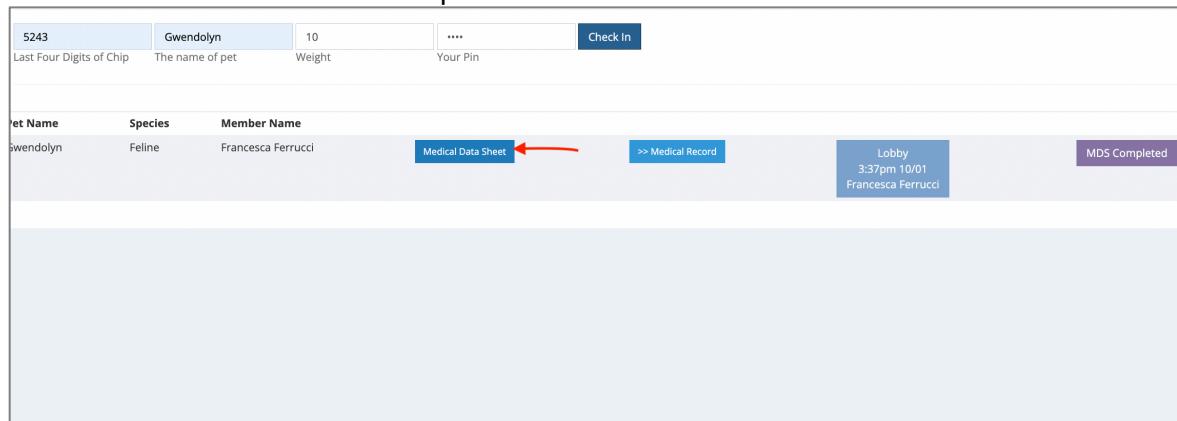
Member Since 04/26/13	Other Pets: Savannah Samson Carlotta "Charlee" Cardi ...
Value of care provided to date \$1,477	Visits: 3 Paid to Date: \$220

<https://www.hsmatch.net/petcheckin.php>

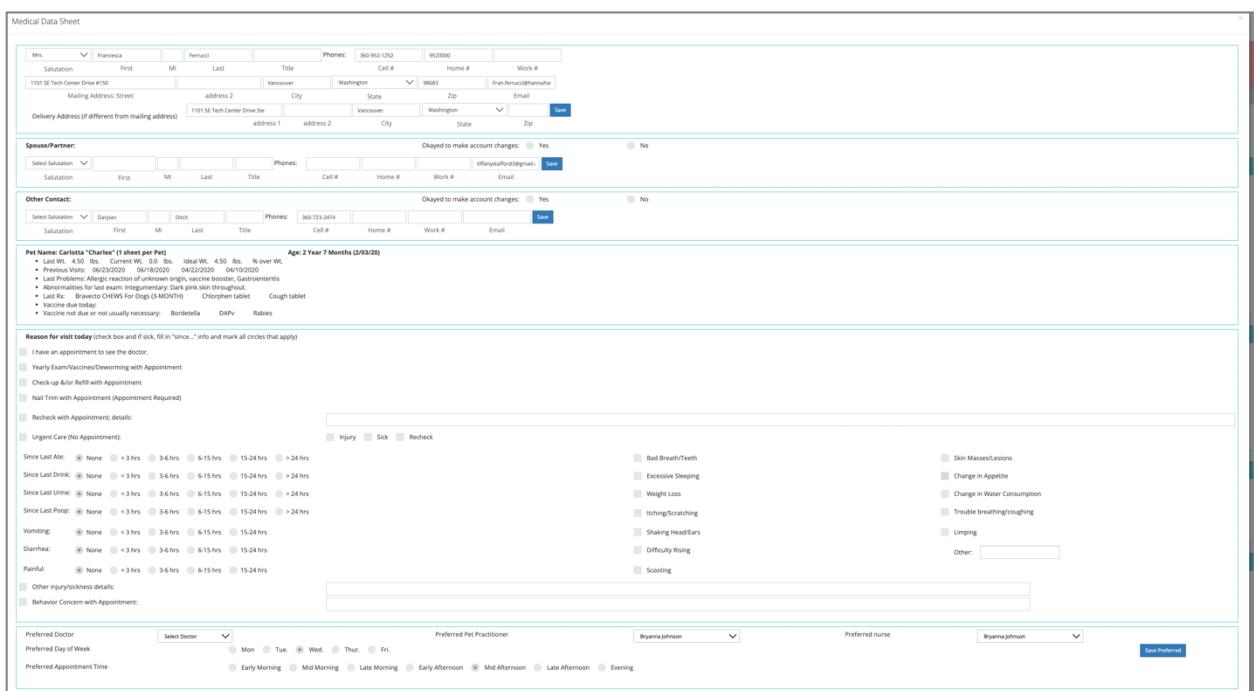
1/1

- F. Print the MDS for the Member to verify that profile information is correct and to answer visit questions.

- G. Once Member has completed, enter the Member's responses in Hannahware. Click on Member Data Sheet to open and enter information.



The screenshot shows a digital check-in kiosk interface. At the top, there are fields for 'Last Four Digits of Chip' (5243), 'Name of pet' (Gwendolyn), 'Weight' (10), and 'Your Pin'. A 'Check In' button is at the bottom right. Below this, a table shows 'Pet Name' (Gwendolyn), 'Species' (Feline), and 'Member Name' (Francesca Ferrucci). To the right of the member name are buttons for 'Medical Data Sheet' (with a red arrow pointing to it), '>> Medical Record', 'Lobby 3:37pm 10/01 Francesca Ferrucci', and 'MDS Completed'.

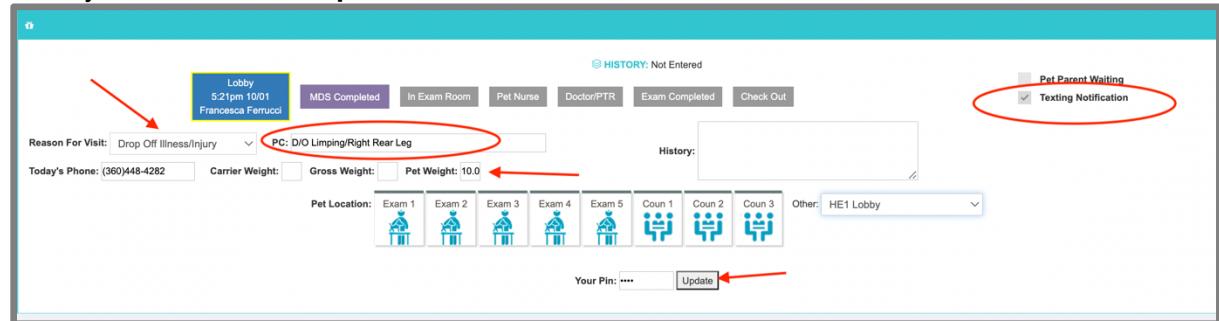


This is a detailed screenshot of the 'Medical Data Sheet' form. It includes sections for basic information (Salutation, First, MI, Last, Title, Phone, Cell, Home, Work, Email), mailing addresses (Delivery Address, Street, City, State, Zip, Email), and spouse/partner information. There are also sections for other contacts and a 'Pet Name: Carlotta "Charlee" (1 sheet per Pet)' section. This section contains fields for last weight, previous visit date, and a list of medications. Below these are sections for 'Reason for visit today' (checkboxes for appointment, exam/vaccines, checkup/reft, nail trim, recheck, urgent care), symptoms (vomiting, diarrhea, pain, etc.), and other details (injury, sick, recheck). At the bottom, there are dropdowns for 'Preferred Doctor' and 'Preferred Pet Practitioner' along with a 'Save Preferences' button.

- H. Pet will be checked in to the Lobby. To complete the check-in process, click on **Medical Record**.

- In the Check In section, select the Reason for Visit from the drop-down choices.
 - For Surgery, select → Drop Off Surgery
 - For Dental, select → Drop Off Dental
 - For Urgent Care and Member is waiting, select → Emergency Exam
 - For Urgent Care and Member is dropping off, select → Drop Off Illness/Injury
 - For Nurse Appointments, select → Wellness Exam or Recheck Exam
 - For Medical Appointments, select → Wellness Exam, Illness/Injury Exam or Recheck Exam
 - For Training, select → Class/Workshop
 - For Grooming, select → Grooming
- Enter the presenting complaint.
 - In the "PC" field:
 - For Surgery, enter → **"SX: [Surgery Type]"** (Example – Sx: Cat Neuter)

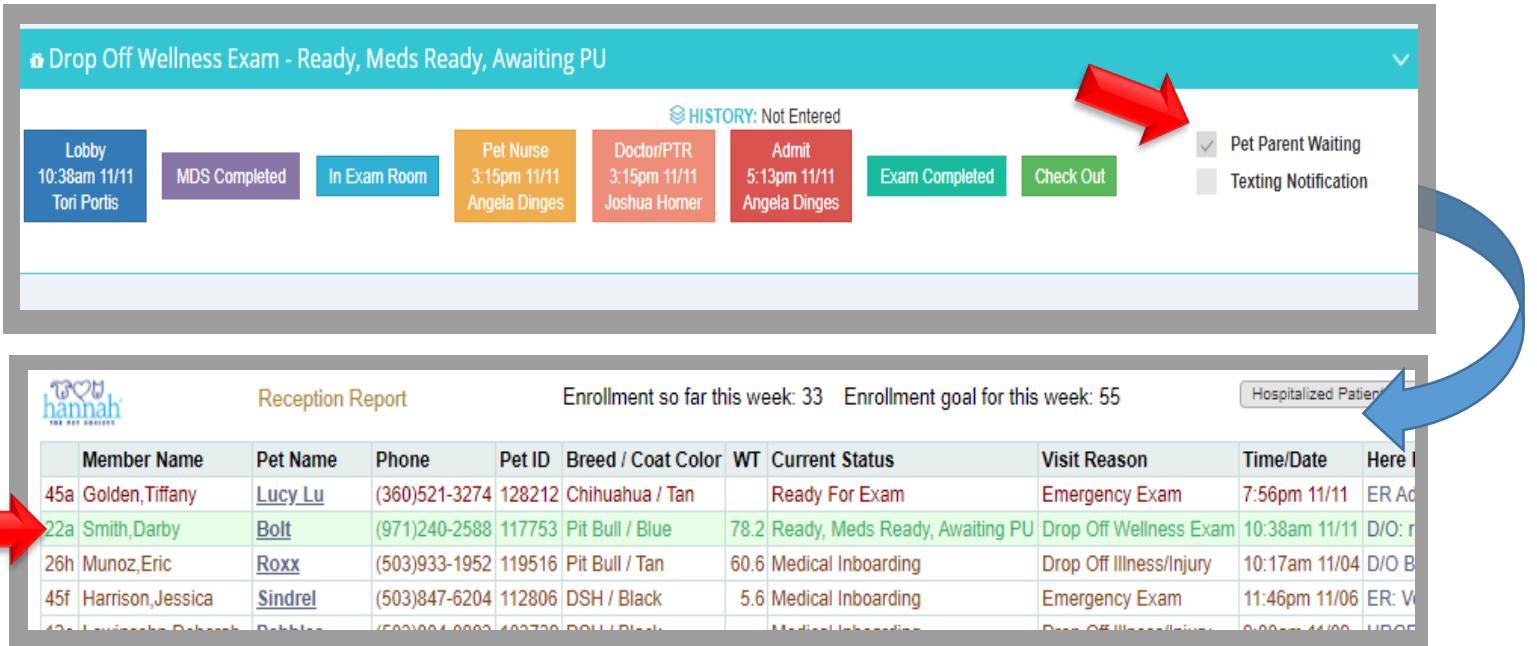
- ii. For Dental, enter → “Dental w/Extractions” or “Dental/No Extractions” (Example – Dental w/Extractions)
 - iii. For Drop-Off, enter → “D/O AM or PM: [Reason for Visit]” (Example – D/O AM: Limping Right Rear Leg)
 - iv. For Urgent Care, enter → “U/C: [Reason for Visit]” (Example – UC: Seizure Activity)
 - v. For New Member, enter → “Scheduled Appt. Time, PTLC or TLC: and Healthy or Sick/Injured Pet” (Example – 12:00 PTLC: Healthy Pet)
 - vi. For Medical & Nurse Appointments, enter → “Scheduled Appt. Time [Appt Type]: [Reason for Visit]” (Example – 10:20 Nurse: Vx Update)
 - vii. For Stool/Urine Sample, enter → “LAB: [Sample Type]” (Example – LAB:Fecal Sample)
 - viii. For Training, enter → “Class Time, Training Type, and Class Name (e.g. Puppy Socialization)” (Example – 15:00 Group Training, Beginner)
 - ix. For Grooming, enter → “Appt. Time and Appt. Type” (Example - 14:00 Full Groom)
- b. Enter a good phone number that we will be able to reach the Member today → if the Member would like to receive text updates, select the “text notification” box → enter your PIN → Click **Update**.



The screenshot shows a software interface for updating a pet's record. At the top, there are tabs for Lobby, MDS Completed, In Exam Room, Pet Nurse, Doctor/PTR, Exam Completed, and Check Out. The 'Lobby' tab is active, showing '5:21pm 10/01 Francesca Ferrucci'. Below the tabs, there are fields for 'Reason For Visit' (set to 'Drop Off Illness/Injury') and 'PC: D/O Limping/Right Rear Leg', which is circled in red. There are also fields for 'Today's Phone:', 'Carrier Weight:', 'Gross Weight:', and 'Pet Weight: 10.0'. A red arrow points to the 'Pet Parent Waiting' checkbox, which is checked and highlighted with a red circle. Below the checkboxes, there is a 'History:' field and a 'Pet Location' section with icons for Exam 1 through Exam 5 and Coun 1 through Coun 3. An 'Other:' dropdown is set to 'HE1 Lobby'. At the bottom, there is a 'Your Pin:' field and a red arrow pointing to the 'Update' button.

Pet Check Out

- When the Member arrives to pick up a hospitalized/dropped off Pet → open the Pet’s Med Record” → select the “Pet Parent Waiting” check box. By checking this box, the Pet will be highlighted green on the hospital reports.



Top Screenshot: Pet Record Update

This screenshot shows the 'Pet Record Update' screen. At the top, there are tabs for Lobby, MDS Completed, In Exam Room, Pet Nurse, Doctor/PTR, Exam Completed, and Check Out. The 'Lobby' tab is active, showing '10:38am 11/11 Tori Portis'. Below the tabs, there are fields for 'Reason For Visit' (set to 'Drop Off Wellness Exam - Ready, Meds Ready, Awaiting PU') and 'PC: Not Entered'. There are also fields for 'Pet Nurse' (set to '3:15pm 11/11 Angela Dinges'), 'Doctor/PTR' (set to '5:13pm 11/11 Joshua Homer'), and 'Admit' (set to '5:13pm 11/11 Angela Dinges'). A red arrow points to the 'Pet Parent Waiting' checkbox, which is checked and highlighted with a red circle. Below the checkboxes, there is a 'History:' field and a 'Pet Location' section with icons for Exam 1 through Exam 5 and Coun 1 through Coun 3. An 'Other:' dropdown is set to 'HE1 Lobby'. At the bottom, there is a 'Your Pin:' field and a red arrow pointing to the 'Update' button.

Bottom Screenshot: Reception Report

This screenshot shows the 'Reception Report' screen. At the top, there is a header with the 'hannah PET HOSPITAL' logo, 'Reception Report', 'Enrollment so far this week: 33', 'Enrollment goal for this week: 55', and a 'Hospitalized Patient' button. Below the header, there is a table with columns for Member Name, Pet Name, Phone, Pet ID, Breed / Coat Color, WT, Current Status, Visit Reason, Time/Date, and Here I. A red arrow points to the 'Pet Parent Waiting' checkbox in the 'Visit Reason' column for the first row, which is checked and highlighted with a red circle. The table data includes rows for members like Golden, Tiffany, Smith, Darby, Munoz, Eric, Harrison, Jessica, and Lawrence, each with their respective pet names, phone numbers, and visit details.



Visit Summary

The **Visit Summary** tab lists all visit history information. You can review the visit date, reason for seeing the Pet, the physical exams, go home instructions, assessments, etc.

1. Click the “**Visit Summary**” tab along the top → “**View All**”

A screenshot of a software interface titled "Visit Summary". At the top, there is a navigation bar with several tabs: Findings (red), Physical Exam (orange), New Findings (red), Diagnostic Tests (green), Medications (blue), Preventative Care (purple), Plan (pink), Follow Up (red), and Visit Summary (brown). The "Visit Summary" tab is currently selected. Below the tabs, the text "Date: 10/27/20" is displayed. Under the "Plan" section, there are two entries for medications:

Medication:	RX #:	Med Name:	Strength:	Freq:	as directed
Medication:	RX #: 329444	Med Name: Ketohex Sh. solution	Strength:	Freq:	as directed
Route:	Bathe		Directions:		
Refills:	0	Expiration Date:	04/27/21		
Duration:		Amount Dispensed:	4 oz		A. Gonzalez Hosp: HE1

Below this, another medication entry is shown:

Medication:	RX #:	Med Name:	Strength:	Freq:	BID
Medication:	RX #: 329445	Med Name: Traz tablet	Strength:100mg	Freq:	BID
Route:	PO		Directions:		
Refills:	4	Expiration Date:	04/27/21		
Duration:		Amount Dispensed:	60	J. Horner	Hosp: HE1

At the bottom left, there is a blue button labeled "+View All" with a red arrow pointing towards it from the left side of the image.



Medications

The **Medications** tab displays:

- Prescriptions Sent Home
- Refill Requests
- Prescriptions Written To Be Filled Outside of Hannah
- Injections & Medications Given in Hospital

There are two ways to enter a prescription refill request.

1. If the Member has the Rx number, go to the home screen and click on “Rx Search”.

A screenshot of the Hannahware software interface. At the top, there's a navigation bar with the "hannah THE PET SOCIETY" logo on the left and "Hannahware" on the right. Below the navigation bar is a sidebar with various links: "Pet Entry", "New Member Sign Up: Placement [TLC]", "Member Search", "Pet Assignment Search", "Pet Check in", "RX Search" (which has a red arrow pointing to it), "Read Messages", "Appointment Scheduler Groups", "Manage RX and DX", "User Permissions", "Exports", "Reports", "Reset Password", and "Retrieve Pin Number".

- A. Enter the Rx number and click on “Search Rx”.

A screenshot of a search form titled "Search RX Number". It has a text input field containing "378053" and a blue "SEARCH RX" button to its right. Below the button is a placeholder text: "Enter the RX number that you wish to refill." The entire form is set against a light gray background.

- B. Select the “Medical Record” for the corresponding Pet.

A screenshot of a search results page for a medical record. The top part shows a search bar with "378053" and a "SEARCH RX" button. To the right of the button is the same placeholder text: "Enter the RX number that you wish to refill.". Below the search bar is a yellow banner with the message: "This RX can not be refilled because it has been more than 14 months since Carlotta "Charlee" has a physical exam." A table follows, with columns: "Go To", "Name", "Pet ID", and "Member Name". The first row shows "Medical Record" under "Go To", "Carlotta "Charlee"" under "Name", "127134" under "Pet ID", and "Francesca Ferrucci," under "Member Name".

- C. You will be taken to the Medications section of the Pet’s medical record. Most prescription refills will be for medications sent home. If not, scroll to the appropriate medications section where the Rx is listed.



- D. Find the medication the Member is requesting to refill. The “Refills” column indicates how many approved refills the Pet has left on a medication.

Meds Date	Rx #	Rx Name	Doctor	Strength	Frequency	Route	Exp. Date	Dose	Dispensed	Refills	Picked Up	Action
06/03/21	373587	Traz	J. Horner	100mg	BID	PO	12/03/21	1	60	1	06/03/2021	Print Refill Request
06/03/21	373585	Ketocon	D. Phillips	200mg	BID	PO	12/03/21	1	60 tablets	2	06/03/2021	Print Refill Request

- E. Click on “Refill Request” whether or not there are any remaining refills.

Meds Date	Rx #	Rx Name	Doctor	Strength	Frequency	Route	Exp. Date	Dose	Dispensed	Refills	Picked Up	Action
06/03/21	373587	Traz	J. Horner	100mg	BID	PO	12/03/21	1	60	1	06/03/2021	Print Refill Request
06/03/21	373585	Ketocon	D. Phillips	200mg	BID	PO	12/03/21	1	60 tablets	2	06/03/2021	Print Refill Request

- F. Select the Pick-up Location → Enter your PIN → Click Submit

2. If the Member does not have the Rx number, search for the Member and select “Rx Request”.

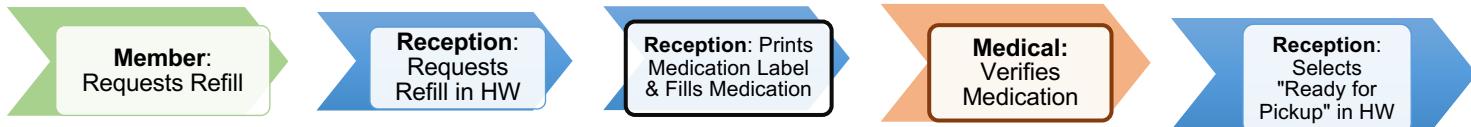
Go To	Name	Address	Phone (L: Best)	Status	Preferred Hosp.	Alert
1 SELECT Placement Add a Pet Appointments RX Request	Francesca Ferrucci	, 97216				
2 SELECT Placement Add a Pet Appointments RX Request	Francesca Ferrucci	10526 SE Washington Street, A-103 Portland, OR, 97216	C: 541-555-1212	Active		
3 SELECT Placement Add a Pet Appointments RX Request	Francesca Ferrucci	10526 SE Washington Street, A-103 Portland, OR, 97216				
4 SELECT Placement Add a Pet Appointments RX Request	Francesca Ferrucci	1101 SE Tech Center Drive #150 Vancouver, WA, 98683	H: 9520000	Active	HE1	Active Team Member
5 SELECT Placement Add a Pet Appointments RX Request	Francesca Ferrucci	1101 SE Tech Center Drive #150 Vancouver, WA, 98683		Active		



- A. Then, select the correct Pet. You will be taken to the medication section of the Pet's medical record. Follow steps D-F above.

Medication Refill Process Flow

- If the medication **has** refills remaining:



- If the medication **does not** have any refills remaining:



- If the medication does **not** have remaining refills → the medical team will need to approve or reject the request.
- If there is remaining refills or once the request is approved by medical → print the label → fill the medication → select “fill” in HW.

Meds Date	Rx #	Rx Name	Doctor	Strength	Frequency	Route	Exp. Date	Dose	Dispensed	Refills	Picked Up	Action																																							
06/03/21	373587	Traz	J. Horner	100mg	BID	PO	12/03/21	1	60	1	06/03/2021																																								
+ View All																																																			
Rx Requests																																																			
<table border="1"> <thead> <tr> <th>Meds Date</th><th>Rx #</th><th>Rx Name</th><th>Doctor</th><th>Strength</th><th>Frequency</th><th>Route</th><th>Exp. Date</th><th>Dose</th><th>Dispensed</th><th>Refills</th><th>Status</th><th>Action</th></tr> </thead> <tbody> <tr> <td>06/03/21</td><td>373601</td><td>Ketocon</td><td>D. Phillips</td><td>200mg</td><td>BID</td><td>PO</td><td>12/03/21</td><td>1</td><td>60 tablets</td><td>1</td><td>Refill Request</td><td> </td></tr> <tr> <td>06/03/21</td><td>373600</td><td>Carpro</td><td>J. Horner</td><td>100mg</td><td>as needed for pain</td><td>PO</td><td>12/03/21</td><td>1/2</td><td>30 tablets</td><td>0</td><td>Refill Request</td><td> </td></tr> </tbody> </table>													Meds Date	Rx #	Rx Name	Doctor	Strength	Frequency	Route	Exp. Date	Dose	Dispensed	Refills	Status	Action	06/03/21	373601	Ketocon	D. Phillips	200mg	BID	PO	12/03/21	1	60 tablets	1	Refill Request		06/03/21	373600	Carpro	J. Horner	100mg	as needed for pain	PO	12/03/21	1/2	30 tablets	0	Refill Request	
Meds Date	Rx #	Rx Name	Doctor	Strength	Frequency	Route	Exp. Date	Dose	Dispensed	Refills	Status	Action																																							
06/03/21	373601	Ketocon	D. Phillips	200mg	BID	PO	12/03/21	1	60 tablets	1	Refill Request																																								
06/03/21	373600	Carpro	J. Horner	100mg	as needed for pain	PO	12/03/21	1/2	30 tablets	0	Refill Request																																								

- The medical team will check the medication filled and select “verify” in HW.

Rx Requests												
Meds Date	Rx #	Rx Name	Doctor	Strength	Frequency	Route	Exp. Date	Dose	Dispensed	Refills	Status	Action
06/03/21	373601	Ketocon	D. Phillips	200mg	BID	PO	12/03/21	1	60 tablets	1	Filled	
06/03/21	373600	Carpro	J. Horner	100mg	as needed for pain	PO	12/03/21	1/2	30 tablets	0	Refill Request	

- Reception or Medical can select “Ready for Pick Up → an automated message will be sent to the Member.

- a. If a Member requested multiple refills → select “Disable Notification” to manually text that all refills are ready from **Member Communication**.



7. When the Member arrives to pick up the medication → Select **“Picked Up”**
- a. Medications that have not been picked up within 14 days → select **“Not Delivered”** → Restock the medication.

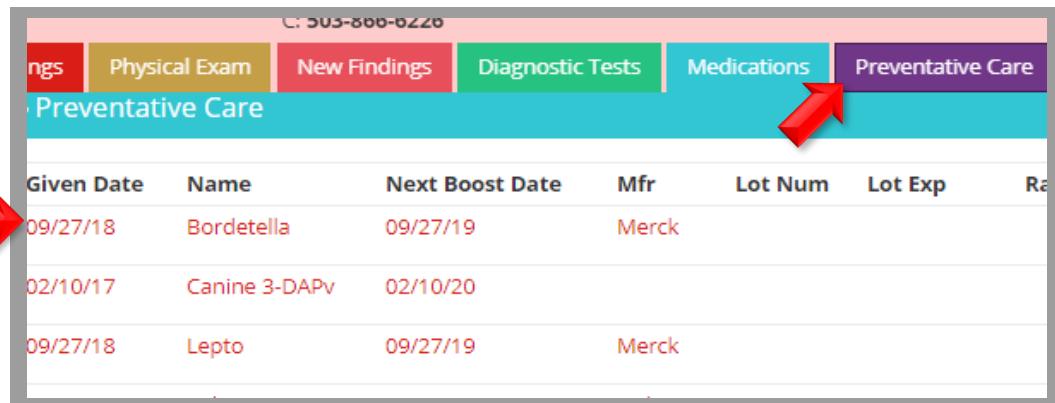
Dispensed	Refills	Status	Action
60 tablets	1	Ready For Pick Up	<input type="button" value="Print"/> <input type="button" value="Picked Up"/> <input type="button" value="Not Delivered"/> <input type="button" value="Notes"/>

NOTE: At any time, you can view the action history by clicking on the most recent status.

RX Action History		
Changed Time	Action/Notes	By
06/03/2021 04:30 pm	Robocall completed	
06/03/2021 04:30 pm	Ready For Pick Up - Text Message Sent. Robocall Initiated.	Kaylynn McClain
06/03/2021 04:30 pm	Verified	Kaylynn McClain
06/03/2021 03:46 pm	Medication is in the fridge	Bing Swigart
06/03/2021 03:46 pm	Filled	Bing Swigart
06/03/2021 10:50 am	Label Printed	Bing Swigart
06/03/2021 10:11 am	Refill Request	Bing Swigart

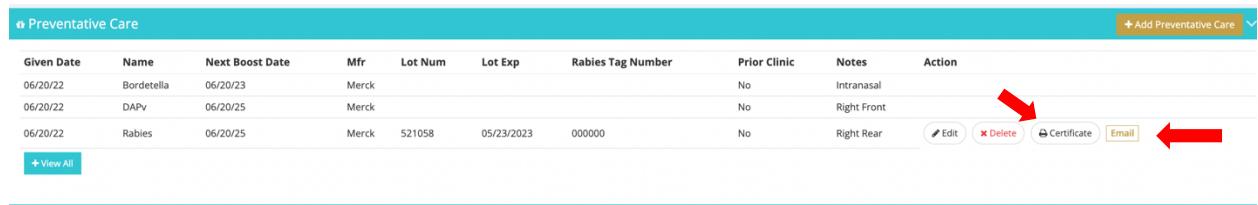
Preventative Care

- Click the “**Preventive Care**” tab under the header in the medical record. Vaccines highlighted in red are either expired or expiring soon.



C: 505-866-0220							
Vaccines	Physical Exam	New Findings	Diagnostic Tests	Medications	Preventative Care	Actions	
Preventative Care							
Given Date	Name	Next Boost Date	Mfr	Lot Num	Lot Exp	Rabies	Action
09/27/18	Bordetella	09/27/19	Merck				
02/10/17	Canine 3-DAPv	02/10/20					
09/27/18	Lepto	09/27/19	Merck				

- To print or email a rabies certificate, click on “**Certificate**” or “**Email**” next to the rabies vaccine information.



Preventative Care										Add Preventative Care
Given Date	Name	Next Boost Date	Mfr	Lot Num	Lot Exp	Rabies Tag Number	Prior Clinic	Notes	Action	Actions
06/20/22	Bordetella	06/20/23	Merck				No	Intranasal		
06/20/22	DAPv	06/20/25	Merck				No	Right Front		
06/20/22	Rabies	06/20/25	Merck	521058	05/23/2023	000000	No	Right Rear	Edit Delete Certificate Email	View All

Medical Documents

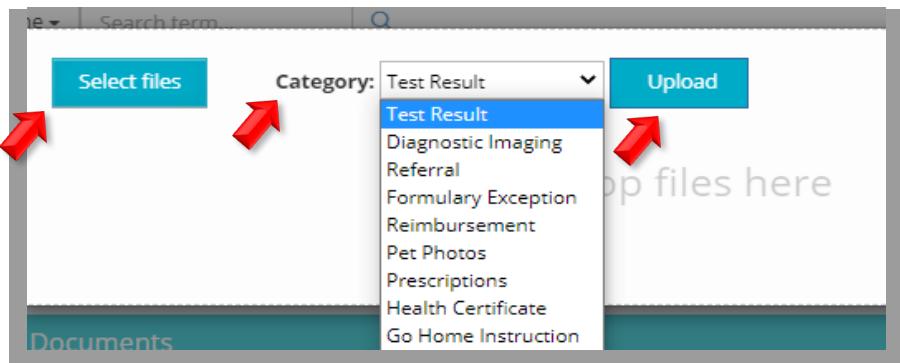
- Medical documents can be found near the bottom of the Pet medical record. There is not a tab for this section. Diagnostic results and outside medical documents can be viewed and uploaded here.
 - Test Results
 - Diagnostic Imaging Results
 - Referrals
 - Formulary Exception
 - Reimbursement Requests
 - Past Prescriptions to Outside Pharmacies
 - Previous Records
 - Photos
 - Go Home Instructions
 - Other
- To upload new medical documents → click the “**Upload**” button.



Medical Documents				
Category	Doc Name	Upload By	Upload Time	Action
Test Result	10222020kingsley Mcclain Written Rx.pdf	Olivia Williams	10/22/2020 12:48pm	View
Prescriptions	Kingsley McClain NexGard Prescription 4-13-20.pdf	Ron Titterington	04/13/2020 01:18pm	View
Prescriptions	Kingsley McClain NexGard Prescription Request 4-13-20.pdf	Ron Titterington	04/13/2020 01:18pm	View
Test Result	Kingsley #121780.pdf	Samantha Hunter	09/20/2019 10:28am	View



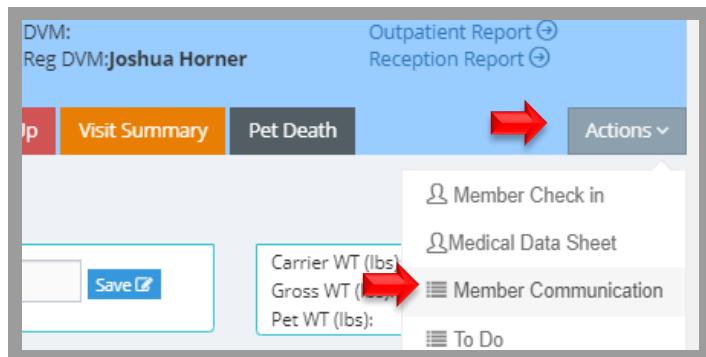
3. Click “Select Files” or drag and drop files → Choose the corresponding category → Click “Upload”.



Member Communication

To document incoming or outgoing communication regarding a Pet's care, please log a brief summary of the communication in **Member Communication** which is located in the Pet's medical record.

1. Select “Actions” in the top right-hand corner of the medical record → Then, “**Member Communication**”.



- a. Select “**Add Communication**” OR select “**Send Text Message**” to send a text directly to the Member.

Member Communication				
Entry Date	Team Member	Member	Communication	Action
11/07/20 11:28 am	Paige Stephens		M said P may had gotten into cat food. M said it is dry kibble. M said P eats those chicken jerky for dogs from China as well. She called back due to pondering thoughts so she wanted DVM to be aware of what else Tucker may have had access to.	+ Send Text Message + Add Communication
11/07/20 11:00 am	Olivia Williams		M called for update on P, I told her med staff did BW and P is on fluids and is section. D visiting out from DVM. CW	



SCEDULING APPOINTMENTS

Nurse Appointments

Scheduling Detail

1. Nurse appointments are scheduled for 20 minutes between 9:00 AM and 6:00 PM, Monday-Saturday. They are performed by PetNurse Aides.
2. Nurse appointments can be scheduled for the following services:
 - a. Vaccine Update
 - b. Wellness Exam (No health concerns)
 - c. Suture Removal
 - d. Toenail Trim
 - e. Anal Gland Expression

Drop-Off Appointments

Scheduling Detail

IT'S VERY IMPORTANT THAT YOU READ THE MEMBER THE DROP OFF SCRIPT WHEN SCHEDULING AND CHECKING IN A DROP-OFF APPOINTMENT.

1. Morning Drop Off: Members will drop off Pet(s) between 7:00 AM and 9:00 AM
2. Afternoon Drop Off: Members will drop off pet(s) between 1:00 PM and 3:00 PM
3. Drop-off appointments can be scheduled for any type of medical appointment, but the following services must be scheduled as a drop-off appointment:

-
- a. Anything not listed as an appointment
 - b. Acupuncture (with Dr. Horner only)
 - c. Re-Bandage
 - d. Blood Work/X-Ray/Lab Work
 - e. When a Member is requesting more than three Nurse appointment services

Drop Off Script:

Morning: **P NAME** is scheduled for drop off on **DATE** at **TIME**. Please ensure that you arrive on time to avoid having to reschedule. Pickup time will vary based on the level of diagnostics needed and the number of emergencies that come in. Typically, our target pickup times are between 2:00-4:00 PM

Afternoon: **P NAME** is scheduled for drop off on **DATE** at **TIME**. Please ensure that you arrive on time to avoid having to reschedule. Pickup time will vary based on the level of diagnostics needed and the number of emergencies that come in. Typically, our target pickup times are between 5:30-6:30 PM.

Urgent Care

All Urgent Care appointments MUST be approved before you confirm with the Member that the Pet can be seen. **ONLY a manager** can approve Urgent Care appointments.



Urgent Care Script:

Please arrive at **TIME** to drop off **P NAME** for urgent care. This is an urgent care appointment which means that **P NAME** will have an evaluation when they come through the door. If we determine that they are stable, **P NAME** may rest in a kennel while we evaluate other Pets coming in for urgent or emergency care. You are welcome to stay and wait for your Pet to be evaluated or drop your Pet off.

Where Should the Pet Be Seen?

All Members who prefer HE2 will always go to HE2. For Members who prefer HE1, use the following guidelines to determine where to direct the Member:

- ❖ Monday-Saturday
 - If the Member can arrive **BEFORE** 4:00 PM they should be seen at HE1.
 - If the Member can only arrive **AFTER** 4:00 PM they should be seen at HE2.
- **Exceptions must be made by the attending DVM or medical manager.

Communication & Hannahware Documentation

- ❖ SCHEDULE the Urgent Care appointment in Hannahware.
 - If no spots are available, ask a manager to enter the appointment.
- ❖ Enter the following information in **Member Communication**:
 - Presenting Complaint
 - Answers to ALL Triage Questions
 - Name of the manager who approved the Pet to be seen.

EXAMPLE:

*M called in because p has been vomiting and having diarrhea since 8 PM last night
-P is has vomited 4-5 times
-Last time pet ate/drank: Yesterday morning
-Vomit is white and foamy with digested food in it
-Diarrhea has sand in it
-Went to the lake yesterday and M is not sure if p got into something while they were there
-No other Pet in the house having symptoms*

Natashia approved Pet to be seen for urgent care today.



New Member Appointments

Scheduling Detail

1. Mondays & Wednesdays at HE1
 - a. Room appointments with a PetNurse or Practitioner
 - b. 9:00 AM – 6:00 PM
2. Fridays at HE1:
 - a. Drop-off appointments scheduled by Membership Team ONLY
 - b. Members can drop-off between 9:00 AM - 10:00 AM and 2:00 PM – 3:00 PM
 - c. Target pickup will be 3 hours after dropping off.
3. Thursdays – Saturdays at HE2
 - a. Room appointments with a PetNurse or Practitioner
 - b. 9:00 AM – 6:00 PM

At Check In

At the time of enrollment, the Member will be emailed and/or texted the link to the Pet Health & Behavior Questionnaire. They are asked to complete it prior to their first appointment. If the Member does not complete the form prior to check in, you will not be able to check the Pet in. When this happens, please let the Member know that it looks like the health and behavior questionnaire hasn't been completed, yet. Offer to text it to them again so that they can complete it on their mobile device or print it out for them. To text or print it:

- Go to Hannah Enrollment
- Then, Step 2 (Pet Info & Questionnaire).
- Click on the Pet
- Click on Text or Print in the upper right-hand corner of the Pet Info section.

A screenshot of a web-based application for pet enrollment. At the top, there's a navigation bar with tabs: Member Application, Pet Info & Questionnaire (which is highlighted in orange), Physical Exam, Membership Agreement, Payment, and Pet Plan & TLC Agreement. Below the navigation, there are four small thumbnail images of dogs, each labeled with a name and ID: Priscilla, 135741, Canine; Presley, 135740, Canine; Presley, 135736, Canine; and Add a Pet, TBG. The main content area has a teal header bar with the title "Pet Info". Underneath, there are various input fields for pet information: Pet Name (Priscilla), Birthdate (03/23/2018), Primary Breed (Maltese), Gender Status (Spayed Female), Weight (Lbs) (4), Primary Coat Color (White), Third Coat Color (None), Healthy Start Fee (0), Birthdate Accuracy (radio buttons for Known or Estimated), Secondary Breed (None), Estimated Adult Weight (Select Weight Group), Secondary Coat Color (None), Test Trans Training (0), Pet Purchase Fee (350), Visit Reason (empty field), and Vaccine types given (empty field). At the bottom right of this section, there are three buttons: "Email Pet Info" (highlighted with a yellow circle), "Text Pet Info", and "Print".

If the Member requests that the link be sent by text or email, please ask the Member to have a seat in the lobby and complete as much information as possible and submit it. Ask the Member



to return to the front desk once they have submitted the information so that you can check-in their Pet. Then, inform the PetNurse that the Member is waiting in the lobby.

If the Member has requested that the form be printed, please print and hand it to the Member with a clipboard and pen. Ask the Member to complete as much information as possible and bring the completed form back to the front desk. Then, inform the PetNurse that the Member is waiting in the lobby.

Surgery and Dental

Scheduling Detail

1. Surgery and Dental appointments are available Monday – Friday only.
2. Surgery and Dental appointments are scheduled for Members to drop off between 6:00 AM and 7 AM.
3. Pickups are generally between 3:30 PM and 6:30 PM
4. Surgeries are scheduled based on a point system.
5. There are a limited number of dental procedures allowed each day. A maximum of six dental procedures can be scheduled (four procedures without extractions, and two procedures with extractions).

Scheduling a New Appointment

OPTION 1

1. Select “Find Appointments” in the top right corner of a Pet’s medical record.

A screenshot of a pet's medical record interface. At the top, there is a navigation bar with tabs: Check in, Unresolved Findings, Physical Exam, New Findings, Diagnostic Tests, Medications, Preventative Care, Plan, Follow Up, Visit Summary, Pet Death, and Actions. The "New Findings" tab is highlighted. Below the navigation bar, there is a summary section for a dog named Kingsley, including its age (2 years 7 months), weight (42 kg), and last visit (23 days ago). It also shows its breed (Australian Cattle Dog - Neutered Male), sex (Canine), and annual pet exam status. To the right of this summary, there is a red arrow pointing to a "Find Appointment" button. Further to the right, there are links for Hospitalized Patient Report, Outpatient Report, and Reception Report. At the bottom of the screen, there is a footer with links for SELECT, Placement, Pet Match, and Appointments.

OR

Member search → “Appointments”

A screenshot of a member search results page. At the top, there is a header with columns: Go To, Name, Address, Phone (Best), and Status. Below the header, there is a table with one row. The "Go To" column contains a "SELECT" button. The "Name" column shows "Kaylynn McClain". The "Address" column shows "2110 NW 195th Ave Beaverton, OR, 97003". The "Phone (Best)" column shows "C: 503-853-3076". The "Status" column shows "Active". At the bottom of the table, there is a red arrow pointing to the "Appointments" tab in the footer, which is highlighted in green. The footer also includes links for SELECT, Placement, Pet Match, and Appointments.



2. Select “Schedule New Appointment” → select Pet → Location → Appointment Type.

The screenshot shows two overlapping windows. The top window is titled "Upcoming Appointments" and lists a single appointment for "Fri 11/20/20 11:30 am" with "Willow" at "HE2" by "Nurse" for "Vaccine/Other". The bottom window is titled "Schedule Appointment" and has three red arrows pointing to the "Select Pet(s)" field (containing "Kingsley"), the "Select Location" field (containing "HE2"), and the "Appointment Type" dropdown menu (which includes "Behavior", "Behavior Triage", "Dental", "Drop-off", "Nurse" - highlighted in blue, "Pet Limo", "Placement", "Surgery", "Training", and "Urgent Care"). A blue arrow points from the "Schedule Appointment" window back up to the "Upcoming Appointments" window.

3. Find the next available appointment day → select the available time → enter Description → Click “Submit”.

NOTE: Blue represents what is currently scheduled and the second color represents what is available.

The screenshot shows a monthly calendar view for November and December. A red arrow points to the yellow-highlighted date "Nov, 2020 8" (Tuesday). Another red arrow points to the "Dec, 2020" calendar where a red arrow highlights the "Wed, 12/02/20 Morning" slot (10:30 am). To the right, a blue arrow points to a detailed time selection window for "Wed, 12/02/20 Morning" showing options from 12:00 pm to 05:30 pm. Below the calendar, a booking form has a red arrow pointing to the "Booked By" field ("Kaylynn McClain") and another red arrow pointing to the "Description" field ("Wellness Exam and TNT"). A large red arrow points from the booking form back down to the calendar.



OPTION 2

1. Click the Hannah logo to go to the Home Screen → “Appointment Scheduler Groups”.

The screenshot shows the software interface for Hannah Pet Hospital. At the top, there is a navigation bar with links: Member Search, Pet Assignment Search, Pet Check in, RX Search, Read Messages, Data Entry Utilities, and Appointment Scheduler Groups. A red arrow points from the "Appointment Scheduler Groups" link to the main content area. Below this, the "Upcoming Appointments" screen is displayed. It includes a table with columns: Appointment Time, Pet, Location, Type, Reason, Booked By, Booked Time, Outcome, Description, and Action. A row in the table shows an appointment for "Fri 11/20/2020 11:30 am" with "Willow" as the pet, "HE2" as the location, and "Nurse" as the type. The "Reason" column shows "Vaccine". To the right of the table is a "Schedule New Appointment" button. Below the table, there is a date selector showing "November 2020" with "today" and navigation arrows. Further down, there is a "Filter Location" section with radio buttons for "HE1", "HE2", and "Telemedicine", and a "Filter Types" section with checkboxes for various appointment types. A red arrow points from the "Filter Location" section to the "Filter Types" section. To the right of these filters is a "Submit" button. Below the filters is a weekly calendar grid for November 2020. The grid shows days from Sunday to Saturday. Specific appointment times are highlighted in yellow for "10a Nurse", "10:30a Nurse", "11a Nurse", "11:30a Nurse", and "12p Nurse". A red arrow points from one of these highlighted times in the calendar to the "Upcoming Appointments" table above. The overall interface is light-colored with blue and grey accents.

2. Filter by Location → Select the Appointment Type → Click “Submit” → Select one of the available appointments.
3. Choose Visit Reason → Enter Description → Enter the Member’s phone number, Member’s Name or Pet ID in the “Member” field → Select the Pet → Click “Submit”.

Reschedule An Appointment

1. Go to Member Appointments → Reschedule → Select new date/time → Click “Submit”.

The screenshot shows the "Schedule New Appointment" form. It has fields for "Location" (HE2), "Start Date/Time" (12/02/2020 2:30 pm), "End Date/Time" (12/02/2020 3:30 pm), "Appointment Type" (Nurse), "Visit Reason" (Wellness Exams selected), "Booked By" (Kaylynn McClain), "Description" (empty), "Member" (5038533076), "Pet" (Kingsley), and a "Submit" button. Red arrows point from the "Visit Reason", "Booked By", "Description", "Member", and "Pet" fields to their respective input areas. The background of the form is white with grey borders for each field.



Cancel an Appointment

1. Go to Member Appointments → Select “Canceled by Member” or “Canceled by Hannah”.

Upcoming Appointments Schedule New Appointment

Appointment Time	Pet	Location	Type	Reason	Booked By	Booked Time	Outcome	Description	Action
Fri 11/20/20 11:30 am	Willow	HE2	Nurse	Vaccine/Other	Karli Bly	10/30/20 11:51 am	Unassigned	Gretchen Klampé- Willow- 128840	Edit Reschedule Check In Canceled by Member Canceled by Hannah

November 2020 Past Appointments +

today < >

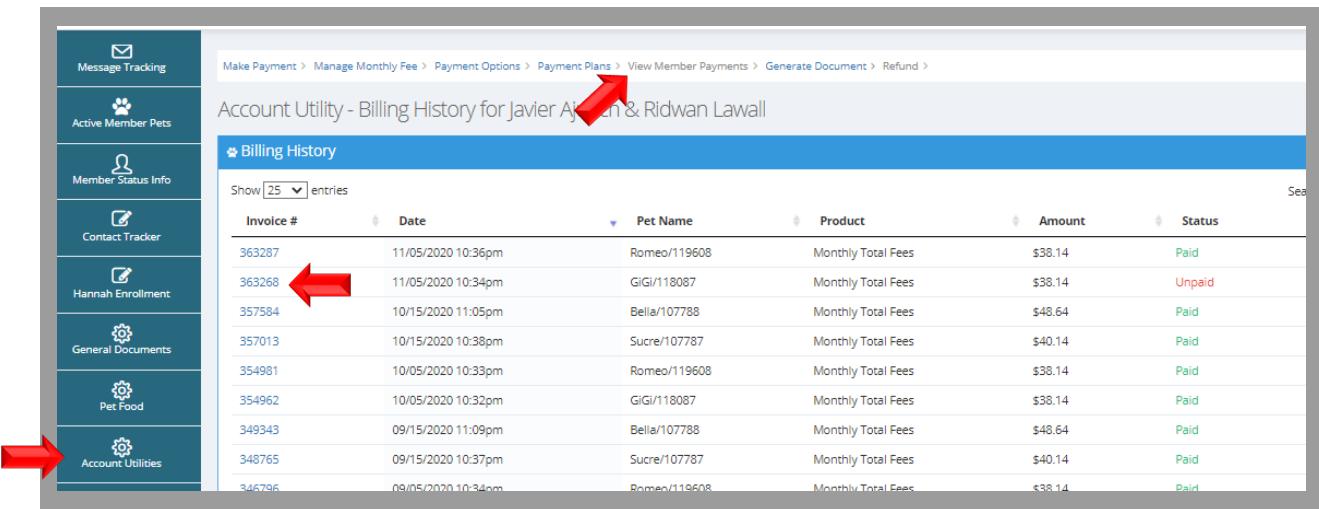


MEMBER BILLING

Make a Payment

Past Due Payments

- Search Member → Click “Select” to open Member’s profile → “Billing” or “Accounting Utilities” → “View Member Payments” → Click on the unpaid invoice number.

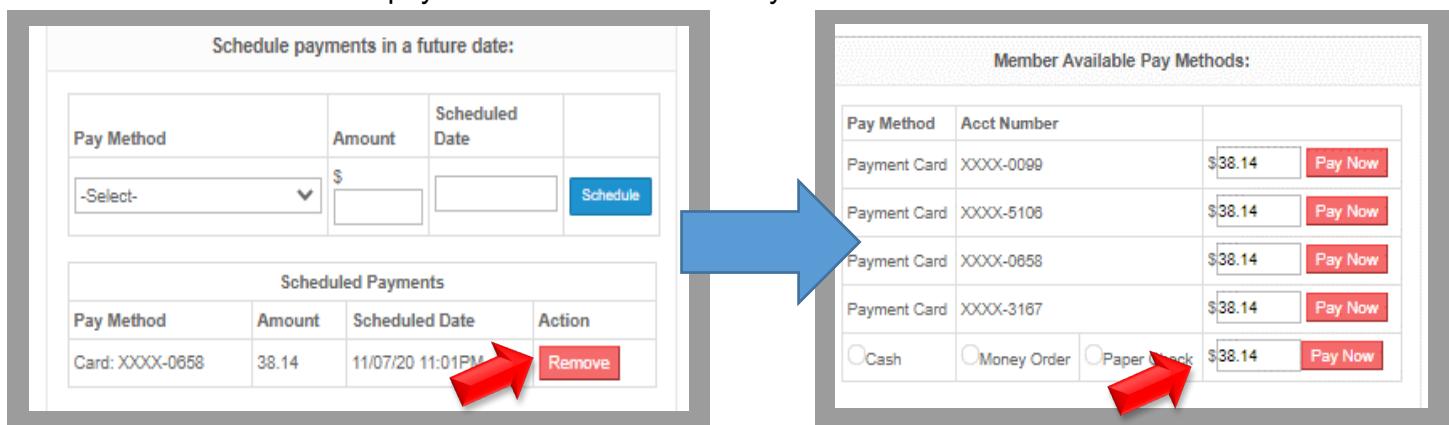


Account Utility - Billing History for Javier Ayzen & Ridwan Lawall

Billing History

Show 25 entries	Invoice #	Date	Pet Name	Product	Amount	Status
363287	11/05/2020 10:36pm	Romeo/119608	Monthly Total Fees	\$38.14	Paid	
363268	11/05/2020 10:34pm	GiGi/118087	Monthly Total Fees	\$38.14	Unpaid	
357584	10/15/2020 11:05pm	Bella/107788	Monthly Total Fees	\$48.64	Paid	
357013	10/15/2020 10:38pm	Sucre/107787	Monthly Total Fees	\$40.14	Paid	
354981	10/05/2020 10:33pm	Romeo/119608	Monthly Total Fees	\$38.14	Paid	
354962	10/05/2020 10:32pm	GiGi/118087	Monthly Total Fees	\$38.14	Paid	
349343	09/15/2020 11:09pm	Bella/107788	Monthly Total Fees	\$48.64	Paid	
348765	09/15/2020 10:37pm	Sucre/107787	Monthly Total Fees	\$40.14	Paid	
346796	09/05/2020 10:34pm	Romeo/119608	Monthly Total Fees	\$38.14	Paid	

- Open the past due invoice (all past due payments will be highlighted red) → remove any “Scheduled Payments” → Enter amount in the empty field next to the correct payment method → Click “Pay Now”.



Schedule payments in a future date:

Pay Method	Amount	Scheduled Date	
-Select-	\$		<input type="button" value="Schedule"/>

Scheduled Payments

Pay Method	Amount	Scheduled Date	Action
Card: XXXX-0658	38.14	11/07/20 11:01PM	<input type="button" value="Remove"/>

Member Available Pay Methods:

Pay Method	Acct Number	
Payment Card	XXXX-0099	\$38.14 <input type="button" value="Pay Now"/>
Payment Card	XXXX-5106	\$38.14 <input type="button" value="Pay Now"/>
Payment Card	XXXX-0658	\$38.14 <input type="button" value="Pay Now"/>
Payment Card	XXXX-3167	\$38.14 <input type="button" value="Pay Now"/>
<input type="radio"/> Cash	<input type="radio"/> Money Order <input type="radio"/> Paper Check	\$38.14 <input type="button" value="Pay Now"/>



Make Monthly Payment

1. Search Member → Click “Select” to open the Member’s profile → “Billing” or “Account Utilities” → “Manage Monthly Fee” → “Plan Fee Detail” for the correct Pet plan.

Pet Name	Pet ID	Specie	Rebill Date	Amount	Plan Fees
Bella	107788	Feline	11/15/2020	\$48.64	Plan Fee Detail
GiGi	118087	Feline	12/5/2020	\$38.14	Plan Fee Detail
Romeo	119608	Feline	12/5/2020	\$38.14	Plan Fee Detail
Sucre	107787	Feline	11/15/2020	\$40.14	Plan Fee Detail

2. Select the Payment Method → Enter your PIN → Click “Pay Monthly Fee Now”.

Plan Fee Detail General ▾

Pay Monthly Fee

Pay Method * Payment Card XXXX-3167

Amount: 48.64

Comments:

Your Pin Pay Monthly Fee Now

Change Monthly Rebill Date

1. Search Member → Click “Select” to open the Member’s profile → “Billing” or “Account Utilities” → “Manage Monthly Fee” → “Plan Fee Detail” → “Payment Settings” → Update the rebill day → Enter your PIN → Click “Submit”.

Payment Settings for Bella

Enter Your Pin Stop Rebill Change History

Payment Card	Entered on 12/17/18	XXXX-0099	Use this
Payment Card	Entered on 3/11/19	XXXX-5106	Use this
Payment Card	Entered on 7/24/20	XXXX-0658	Use this
Payment Card	Entered on 8/20/20	XXXX-3167	Current Pay Method

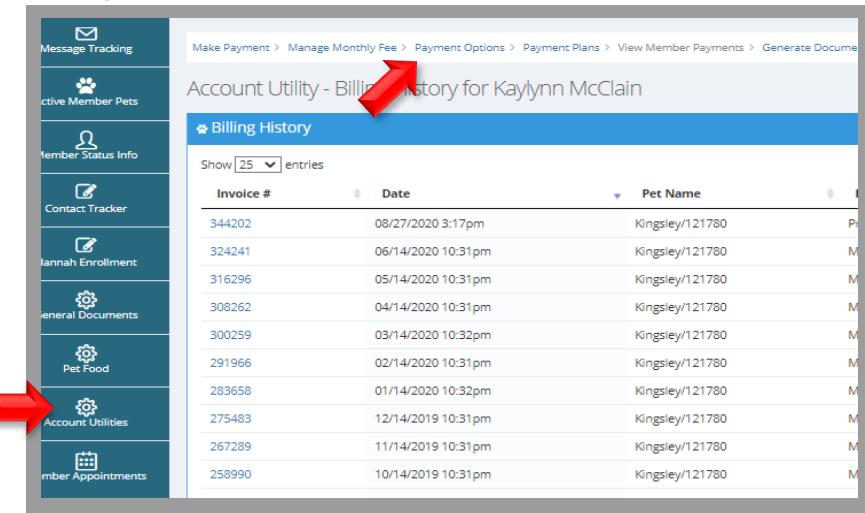
Rebill Day: * 15

Rebill Month: * November 2020

Your Pin: Your Pin Submit

Update/Change Payment Method

- Search Member → Click “Select” to open the Member’s profile → “Billing” or “Account Utilities” → “Payment Options”

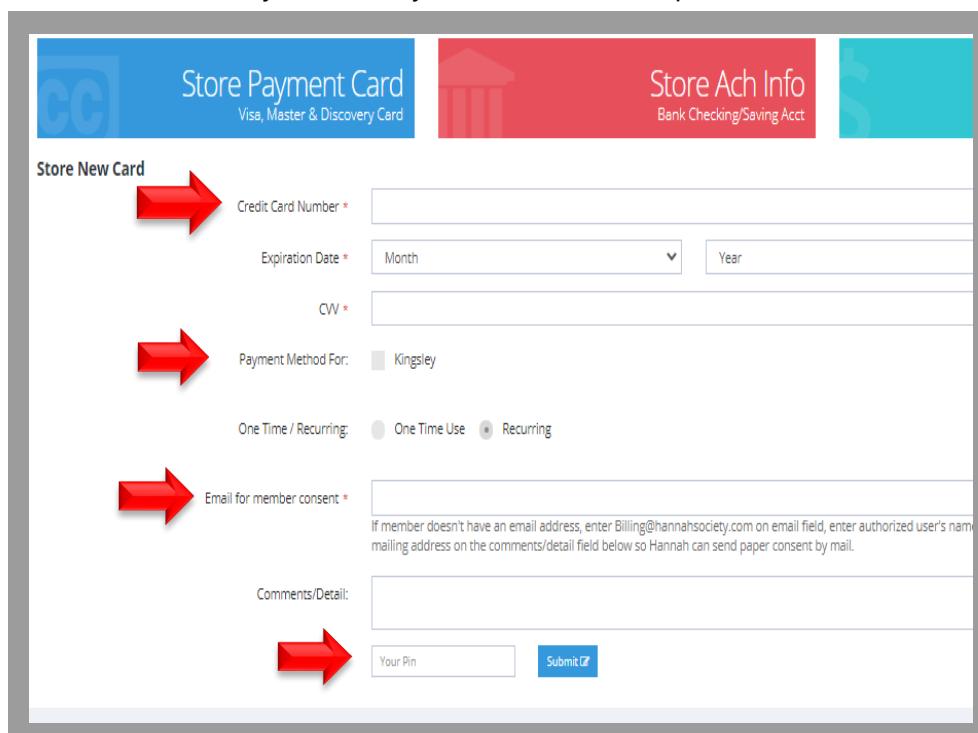


The screenshot shows the 'Billing History' section of the software. The left sidebar has a dark blue background with various icons and links: Message Tracking, Active Member Pets, Member Status Info, Contact Tracker, Hannah Enrollment, General Documents, Pet Food, Account Utilities (which is highlighted with a red arrow), and Member Appointments. The main area shows a table of billing history entries for 'Kaylynn McClain'. The table columns are Invoice #, Date, and Pet Name. The data shows multiple entries for 'Kingsley/121780' at various dates between 2019 and 2020.

- Enter the new credit card or ACH information → Select the Pet(s) that the payment method can be used for → Select “Recurring” or “One Time Use”

 - If you selected “Recurring” → Enter the Member’s email address → Enter your PIN → Click “Submit”.

NOTE: The Member must open the email and authorize the use of the card for recurring payments. We will not be able to charge the card until the Member does this so have the Member do so while they are in front of you or while you have them on the phone.



The screenshot shows the 'Store Payment Card' and 'Store Ach Info' sections. The 'Store Payment Card' section includes fields for Credit Card Number, Expiration Date (Month and Year dropdowns), CV, Payment Method For (selected 'Kingsley'), and a radio button for One Time / Recurring (selected 'Recurring'). The 'Store Ach Info' section includes fields for Bank Checking/Saving Acct and a large text area for Comments/Detail. Red arrows point to the Credit Card Number field, the Expiration Date dropdowns, the CV field, the Payment Method For dropdown, the 'Recurring' radio button, the Email for member consent field, and the Comments/Detail text area.



Payments for Products or Additional Services

- Search Member → Click “Select” to open the Member’s profile → “Billing” or “Accounting Utilities” → “Make Payment”.

Account Utility - Billing History for Kaylynn McClain

Billing History

Invoice #	Date	Pet Name
344202	08/27/2020 3:17pm	Kingsley/121780
324241	06/14/2020 10:31pm	Kingsley/121780
316296	05/14/2020 10:31pm	Kingsley/121780
308262	04/14/2020 10:31pm	Kingsley/121780
300259	03/14/2020 10:32pm	Kingsley/121780
291966	02/14/2020 10:31pm	Kingsley/121780
283658	01/14/2020 10:32pm	Kingsley/121780
275483	12/14/2019 10:31pm	Kingsley/121780
267289	11/14/2019 10:31pm	Kingsley/121780
258990	10/14/2019 10:31pm	Kingsley/121780

Make Payment

Pet Plan: Kingsley - 121780 - Canine - Finalized

Payment Option: Card ACH Cash Money Order Paper Check

Card: XXXX - 6322

Product Type * Product

Item: Hannah Food Scale **Unit Price:** **Quantity:**

Total Amount 20

Notes

Your Pin **Submit Payment**

- Select the Pet → choose the Payment Option → Select the Product Type (*the price should auto populate for you*) → Enter the quantity → Enter your PIN → Click “Submit”.

Accounts on Hold

- If an account is on hold, and alert will appear in the Member Search results.

Go To	Name	Address	Phone ()	Alert
1 <input checked="" type="button"/> SELECT <input type="button"/> Placement <input type="button"/> Pet Match <input type="button"/> Add a Pet <input type="button"/> Appointments	Terry Baer Christine Baer	11951 NE Holladay Street Portland, OR, 97220	C: 503-539-8974 H: 503-462-9138	Active

OR



2. Along the top section of a Pet's medical record.

The screenshot shows a web-based pet medical record system. At the top right, a red arrow points to the text "Account On Hold". The main area displays a pet's information: Brooklyn, Age: 5 Mths (5/16/20), WT: 24.8 Lbs (11.2 KG), Last: 68 Days, T. Visits: 1, C: 503-539-8974. To the right, it lists the pet as an American Pit Bull Terrier - Intact Female Canine, with services like Annual pet exam - preventative care and contact information for Sergeant at 503-462-9138. Below this, a navigation bar includes tabs for Check in (highlighted in orange), Unresolved Findings, Physical Exam, New Findings, Diagnostic Tests, Medications, Preventative Care, Plan, and Follow.

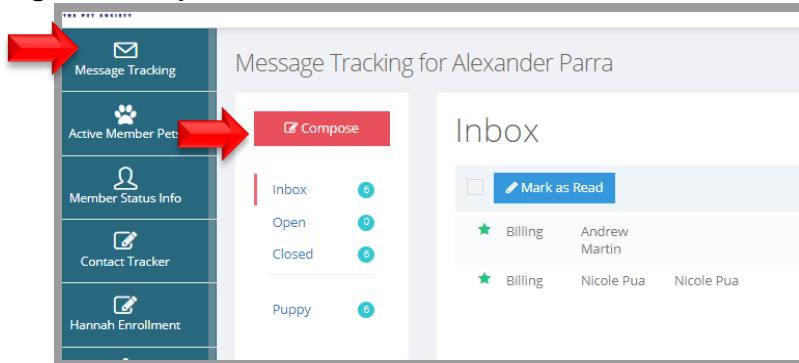
- a. If an account is on hold, a Member must bring their Pet's plan current before we will provide routine services. We will **only** be able to provide emergency services for a Pet when an account is on hold.

MESSAGE TRACKING

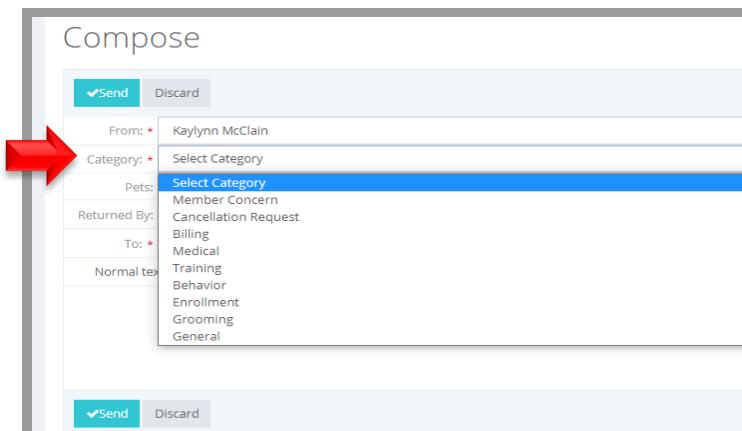
Message Tracking is used for internal communication from one team member to another. The functionality is similar to email.

Create a New Message Tracking

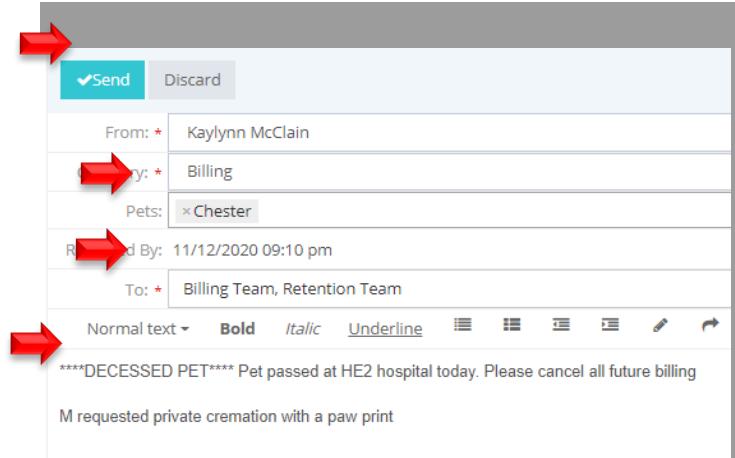
- Search Member → Click “Select” to open the Member’s profile → “Message Tracking” → “Compose”.



- Select the correct category.



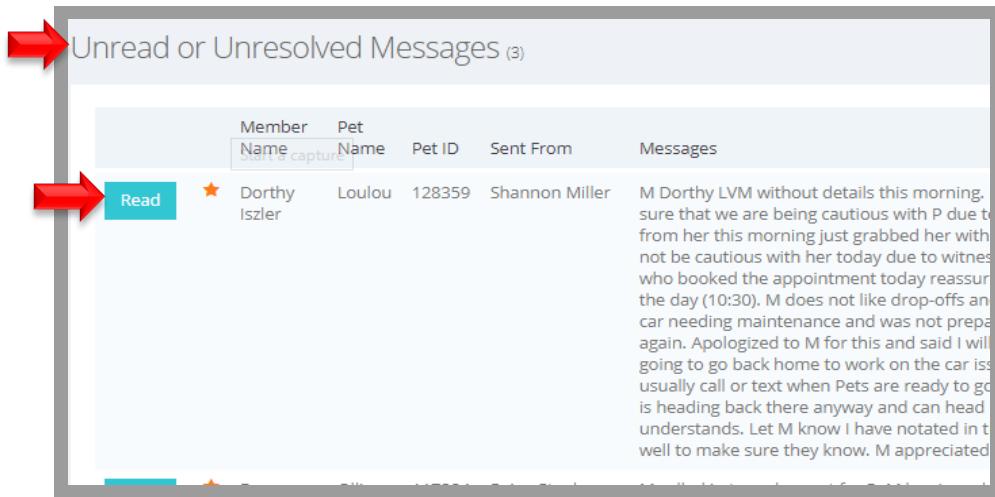
- Select Pet(s) → Select recipient(s) → Enter message → Click “Send”.



From: * Kaylynn McClain
 To: * Billing
 Normal text
 DECEASED PET Pet passed at HE2 hospital today. Please cancel all future billing
 M requested private cremation with a paw print

Pending Messages

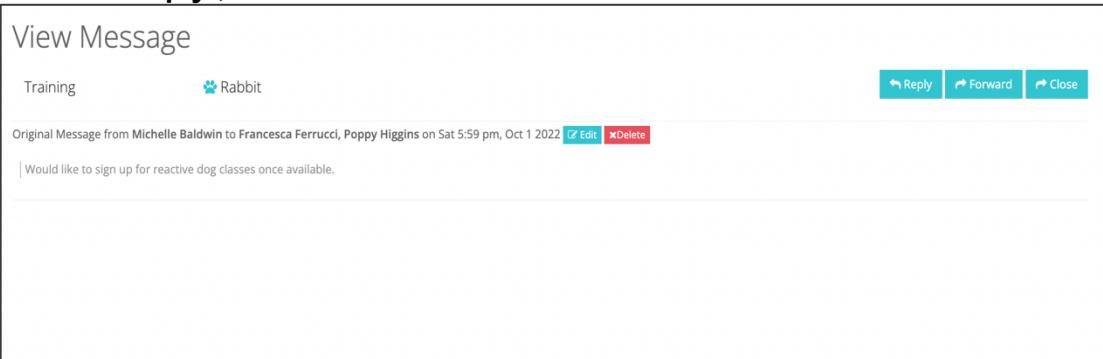
- When a user first logs into Hannahware, all pending messages will appear on the Home Screen.
- To read a message, click “Read”.



Unread or Unresolved Messages (3)

Member Name	Pet Name	Pet ID	Sent From	Messages
Dorothy Iszler	Loulou	128359	Shannon Miller	M Dorothy LVM without details this morning, sure that we are being cautious with P due to from her this morning just grabbed her with not be cautious with her today due to witness who booked the appointment today reassur the day (10:30). M does not like drop-offs an car needing maintenance and was not prepa again. Apologized to M for this and said I will going to go back home to work on the car iss usually call or text when Pets are ready to go is heading back there anyway and can head understands. Let M know I have noted in t well to make sure they know. M appreciated

- To reply, forward or close a message, click on the message → Click the desired action of “Reply”, “Forward” or “Close”.



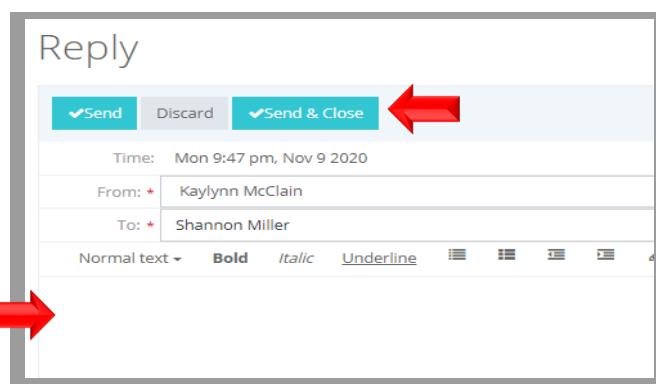
View Message

Training Rabbit

Original Message from Michelle Baldwin to Francesca Ferrucci, Poppy Higgins on Sat 5:59 pm, Oct 1 2022 [Edit](#) [Delete](#)

| Would like to sign up for reactive dog classes once available.

- Complete required fields. Then, “Send”, “Discard” or “Send & Close”. If you want to keep the message in your pending messages, click “Send” rather than “Send & Close”.



Reply

Send Discard Send & Close

Time: Mon 9:47 pm, Nov 9 2020

From: * Kaylynn McClain

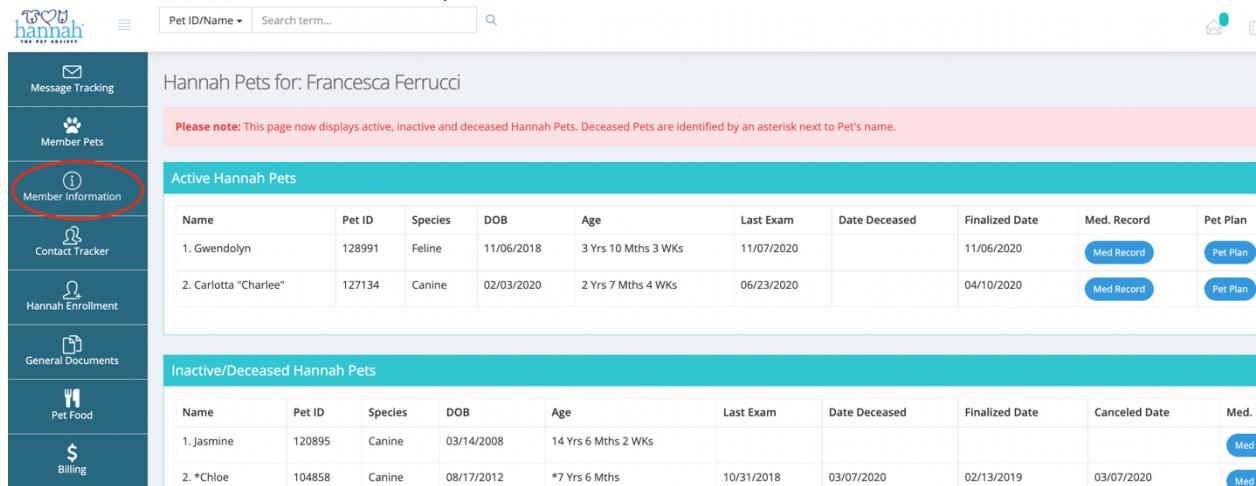
To: * Shannon Miller

Normal text Bold Italic Underline

MEMBER & PLAN INFORMATION

Member Information

1. Member Search → Click “Select” to open the Member’s profile → To view or update the Member’s contact information, click “Member Information”.



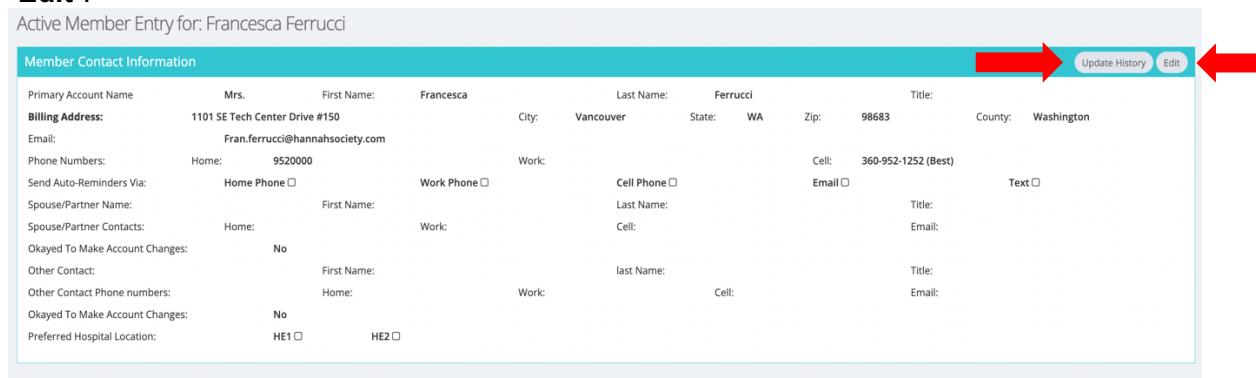
Hannah Pets for: Francesca Ferrucci

Please note: This page now displays active, inactive and deceased Hannah Pets. Deceased Pets are identified by an asterisk next to Pet's name.

Name	Pet ID	Species	DOB	Age	Last Exam	Date Deceased	Finalized Date	Med. Record	Pet Plan
1. Gwendolyn	128991	Feline	11/06/2018	3 Yrs 10 Mths 3 Wks	11/07/2020		11/06/2020	Med Record	Pet Plan
2. Carlotta "Charlee"	127134	Canine	02/03/2020	2 Yrs 7 Mths 4 Wks	06/23/2020		04/10/2020	Med Record	Pet Plan

Name	Pet ID	Species	DOB	Age	Last Exam	Date Deceased	Finalized Date	Canceled Date	Med.
1. Jasmine	120895	Canine	03/14/2008	14 Yrs 6 Mths 2 Wks					Med
2. *Chloe	104858	Canine	08/17/2012	*7 Yrs 6 Mths	10/31/2018	03/07/2020	02/13/2019	03/07/2020	Med

2. To view the change history, click “Update History”. To change information, click “Edit”.



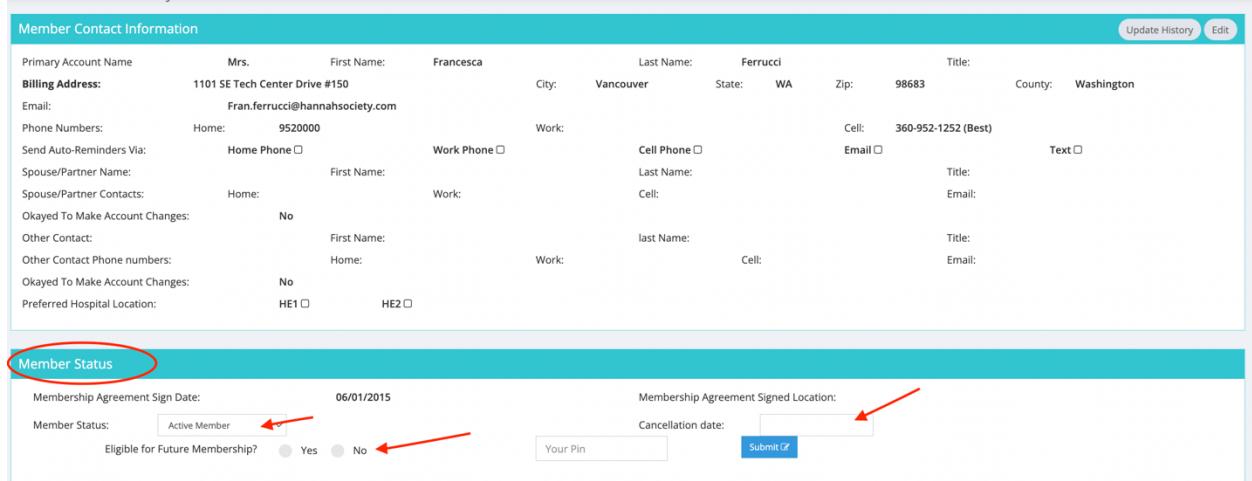
Active Member Entry for: Francesca Ferrucci

Member Contact Information									
Primary Account Name	Mrs.	First Name:	Francesca	Last Name:	Ferrucci	Title:			
Billing Address:	1101 SE Tech Center Drive #150			City:	Vancouver	State:	WA	Zip:	98683
Email:	Fran.ferrucci@hannahsociety.com							County:	Washington
Phone Numbers:	Home:	9520000		Work:		Cell:	360-952-1252 (Best)		
Send Auto-Reminders Via:	Home Phone	□	Work Phone	□	Cell Phone	□	Email	□	Text
Spouse/Partner Name:	First Name:			Last Name:					
Spouse/Partner Contacts:	Home:	Work:			Cell:			Email:	
Okayed To Make Account Changes:	No								
Other Contact:	First Name:			Last Name:			Title:		
Other Contact Phone numbers:	Home:			Work:			Cell:		
Okayed To Make Account Changes:	No							Email:	
Preferred Hospital Location:	HE1	□	HE2	□					

Member Status

In the **Member Information** module, you can view the Member's status, eligibility for future Membership and Cancellation Date, if a cancelled Membership.

1. After clicking **Member Information**, scroll down to the **Member Status** section located below the **Member Contact Information** section.
2. Scroll to the bottom of the screen → under "Member Status" you'll be able to see if they are an "Active Member" or have a "Cancelled Membership".

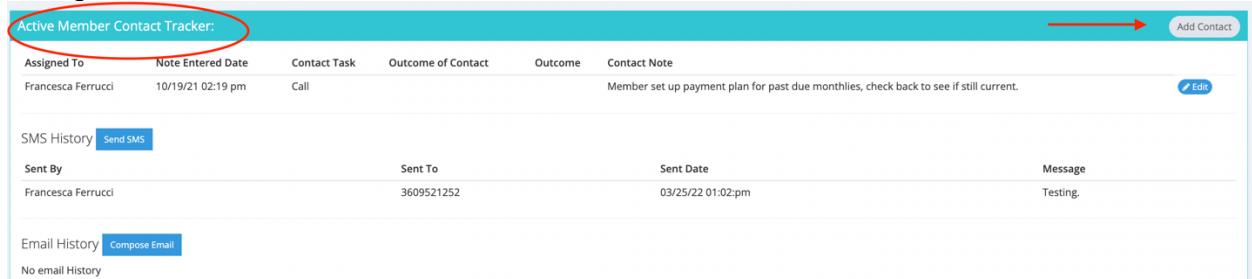


The screenshot shows the Member Contact Information form at the top, followed by the Member Status section. In the Member Status section, the 'Member Status' dropdown is set to 'Active Member'. Below it, there are two radio buttons: 'Yes' and 'No' for 'Eligible for Future Membership'. A red circle highlights the 'Member Status' dropdown, and two red arrows point to the 'Yes' and 'No' radio buttons. To the right, there is a 'Cancellation date:' field with a calendar icon and a 'Submit' button.

Active Member Contact Tracker

To record and view contact attempts that require follow-up for an Active Member, use the Active Member Contact Tracker that is located in the Member Information module.

1. To log a contact, click "**Add Contact**".



The screenshot shows the Active Member Contact Tracker page. At the top, there is a header with a red arrow pointing to the 'Add Contact' button. Below the header, there is a table with columns: Assigned To, Note Entered Date, Contact Task, Outcome of Contact, Outcome, and Contact Note. One row in the table shows 'Francesca Ferrucci' assigned to a 'Call' task with a note about a payment plan. Below the table, there are sections for SMS History, Email History, and a compose email button. A red circle highlights the 'Add Contact' button at the top right.

2. Complete all required fields:
 - a. Contact Task (Call, Text, Email)
 - b. Pet(s)
 - c. Contact Status
 - d. Contact Note
 - e. Contact Assigned To Team Member
 - f. Contact To Be Completed By

3. Then, click "**Save**".



Active Member Contact Tracker:

Assigned To	Note Entered Date	Contact Task	Outcome of Contact	Outcome	Contact Note
Francesca Ferrucci	10/19/21 02:19 pm	Call			Member set up payment plan for past due monthlies, check back to see if still current.

Add Active Member Contact Tracking:

Member Note Entry Date:	10/01/2022 11:52 pm	
Contact Task:	Call	
Pets:	Mia	
Cancellation Status:	Follow Up Needed - Service Issue	
Contact Note:	Member called in because she wasn't provided a Visit Summary or her Pet's medication when she picked up her Pet. When she asked the TM that discharged her Pet, the TM (tall female w/brunette, shoulder length hair) told her she couldn't help her and walked off.	
Contact Task Assigned to Team Member:	Francesca Ferrucci	
Contact to be completed on or by:	10/03/2022 12:00 pm	
Outcome of Contact Date:		
Completed by Team Member:	SELECT Team member	
Outcome of Contact:	SELECT Outcome	
Outcome Note:		

Cancel **Save**

- To complete a task, click “Edit” → Select Team Member for Completed By → Select Outcome of Contact → Enter Outcome Note → Click “Save”.

Outcome of Contact Date: 10/02/22 12:01 am

Completed by Team Member:	Francesca Ferrucci
Outcome of Contact:	Left Message
Outcome Note:	

Cancel **Save**

When a task is completed, there will be a date/time stamp in the “Outcome of Contact” field.

Active Member Contact Tracker:

Assigned To	Note Entered Date	Contact Task	Outcome of Contact	Outcome	Contact Note	Action
Francesca Ferrucci	10/19/21 02:19 pm	Call			Member set up payment plan for past due monthlies, check back to see if still current.	Edit
Francesca Ferrucci	10/01/22 11:59 pm	Call	10/02/22 12:01 am	Left Message	Member called in because she wasn't provided a Visit Summary or her Pet's medication when she picked up her Pet. When she asked the TM that discharged her Pet, the TM (tall female w/brunette, shoulder length hair) told her she couldn't help her and walked off.	Closed Task

Edit Active Member Contact Tracking:

You can also view the text and email history in the Active Member Contact Tracker section.

- To send a text message or email to an Active Member, click “Send SMS” or “Compose Email”.

SMS History	Send SMS
Sent By	
Francesca Ferrucci	Sent To
	3609521252
Sent Date	
03/25/22 01:02:pm	
Message	
Testing.	
Email History	Compose Email
No email history	



2. Complete each field → Select a template, if appropriate → Click “Send”.

SMS History [Send SMS](#)

Compose SMS:

Send From (+15032139606):

Send To:

Use Templates:

Message Text:

[Cancel](#) [Send](#)

For email, you can also attach a file, if necessary.

Email History [Compose Email](#)

From/Reply: * Francesca Ferrucci
To: * Fran.ferrucci@hannahsociety.com
Templates: Cancellation Request 1
Subject: * Cancellation Request

Normal text

Hi Francesca Ferrucci,
Thank you for your Hannah membership. We recently received a request to cancel your Pet's plan and we need additional information before we can process your request. Please take a few moments to review, complete and return the attached form so that we can proceed. If you have decided to not cancel your plan at this time, please email us at membershipteam@hannahsociety.com, asking us to keep your Pet's plan active.
Sincerely,
Francesca Ferrucci

+ Add files... No file chosen

[Send](#) [Discard](#)

Pet Plan Information

1. Search Member → Click “Select” to open the Member’s profile → “Member Pets” → “Pet Plan”.

Message Tracking

Member Pets

Member Information

Contact Tracker

Hannah Enrollment

General Documents

Pet Food

Billing

Member Appointments

Hannah Pets for: Francesca Ferrucci

Please note: This page now displays active, inactive and deceased Hannah Pets. Deceased Pets are identified by an asterisk next to Pet's name.

Active Hannah Pets										
Name	Pet ID	Species	DOB	Age	Last Exam	Date Deceased	Finalized Date	Med Record	Pet Plan	Pet Plan
1. Gwendolyn	128991	Feline	11/06/2018	3 Yrs 10 Mths 3 Wks	11/07/2020		11/06/2020	Med Record	Pet Plan	Cancellation Request
2. Carlotta "Charlee"	127134	Canine	02/03/2020	2 Yrs 7 Mths 4 Wks	06/23/2020		04/10/2020	Med Record	Pet Plan	Cancellation Request

Inactive/Deceased Hannah Pets										
Name	Pet ID	Species	DOB	Age	Last Exam	Date Deceased	Finalized Date	Canceled Date	Med. Record	Pet Plan
1. Jasmine	120895	Canine	03/14/2008	14 Yrs 6 Mths 2 Wks					Med Record	Pet Plan
2. *Chloe	104858	Canine	08/17/2012	*7 Yrs 6 Mths	10/31/2018	03/07/2020	02/13/2019	03/07/2020	Med Record	Pet Plan
3. Ayla	121269	Canine	10/27/2012	9 Yrs 11 Mths	05/02/2019				Med Record	Pet Plan



2. Select a Pet's Plan by clicking the box with the Pet's information.

Carlotta "Charlee", 127134, Canine Intact Female, DOB: 02/03/2020 Plan start: 04/10/2020 Age: 2 Year 7 Mths Breed: Maltese C.W.: 4.50 Lbs / O.W: 4.50 Lbs	Gwendolyn, 128991, Feline Spayed Female, DOB: 11/06/2018 Plan start: 11/06/2020 Age: 3 Year 10 Mths Breed: Domestic Short Hair C.W.: 6.30 Lbs / O.W: 6.50 Lbs
--	--

Pet Plan(s) for Carlotta "Charlee"

Old Notes Active Member Notes Appt Scheduler Medical Record

3. The Pet's plan information is displayed and includes:

- a. Plan Level
 - b. Plan Status
 - c. Plan Start Date
 - d. Sign Method
4. If the “Sign Method” is “Unsigned”, the Pet’s plan is not finalized. This can be the result of:
- a. The Member didn’t sign the initial TLC/PTLC Agreement, OR
 - b. The plan was modified (typically due to a pricing change) and not signed, OR
 - c. The “**Modify Plan**” button was mistakenly clicked.

Note: If the Pet plan was mistakenly modified, the new “Assigned” plan needs to be deleted.

Pet Name	Pet ID	Plan Level	Status	Sign Date	Plan Start Date	Plan Type	Sign Method
Carlotta "Charlee"	127134	Team Member	Finalized	04/10/2020	04/10/2020	Team Member	By Hand
Carlotta "Charlee"	127134	Team Member	Assigned			Team Member	Unsigned

Pet Plan(s) for Carlotta "Charlee"

Old Notes Active Member Notes Appt Scheduler Medical Record

Sign Agreement Fran.ferrucci@hannahs Email Sign Agreement >

360-952-125 Your PIR Text Sign Agreement >

5. To view the plan’s pricing information, scroll down to Hannah Service Type. From this point forward, the plan’s pricing information is displayed. If there are additional fees, they will be listed along with the amount.



Hannah Service Type: Team Member

Veterinary Care
Emergency Care
BEST Program

\$61.00 /Month	Total Lifetime Care Monthly Fee	
\$0.00	Administrative Fee (One Time)	
\$20.00 /Month	Healthy Start Fee	
\$20.00 /Month	Initial Fee for (Monthly Charge until 6 months following the surgery is done)	
\$0.00	Test/Fees Training	
\$0.00	Sick and Injured Care Fee	
\$0.00 /Month	Ongoing Care Fee (Monthly Charge for life of the Pet)	
\$0.00 /Month	Moving/Overnight Fee	
\$0.00	Behavior Care Fee	
\$0.00 /Month	Ongoing Behavior Care (Monthly Charge for life of the Pet)	
\$0.00 /Month	Moving/Special Breed Fee (Monthly Charge for life of the Pet)	
\$0.00 /Month	Monthly Start Fee	
Flea, Tick and Heartworm Preventatives:		
\$0.00 /Month	Total Lifetime Prevention	
\$0.00 /Month	At Jetzt Topical Prevention	
\$0.00 /Month	Banixic Chewable Prevention	
\$0.00 /Month	Tixeric Chewable Prevention	
Pet Food, Supply and Delivery Options:		
\$0.00 /Month	None	
\$0.00 /Month	1 Month	
\$0.00 /Month	4 Months	
\$0.00 /Month	8 Months	
\$0.00 /Month	12 Months	
\$0.00 /Month	16 Months	
\$0.00 /Month	20 Months	
Additional Service Charges (Plan):		
Discounts/Donations:		
\$ 0.00 /Month	Adjustment to Monthly Fee	
Enter Promo Code: [] Reference ID: [] Sales Promotion:		
State Sales Tax:		
\$0.00 /Month	State Sales Tax	
Summary:		
\$121.00 /Month	Monthly Support Fee Total	
\$0.00	Additional Tax Total	
\$121.00	Total Due on Plan Start	
\$0.00 /Month	Non Refundable Pet Purchase Fee	
Special Terms:		
500 characters Max		
Your File: [] Select File		
Hannah Team:		
Enrollment Source: Employee	Appointment Setter: Heather Drape	Membership Coordinator: Heather Drape
Credit Score: 0	[Save]	[Select Medical Team Member]

6. If the plan has/had a Healthy Start Fee, the monthly fee will be displayed along with the number of payments made of the number of payments due.
 - a. The Healthy Start Fee is charged for the first 12 months of the Pet's plan. This covers the additional cost for puppy care like spays/neuters, vaccines, emergencies, and training.

Pet Name	Pet ID	Plan Level	Status	Sign Date	Plan Start Date	Plan Type	Sign Method	Detail	View Agreement	Print
Kingsley	121780	TLC	Finalized	05/21/2018	05/21/2018	TLC	By Hand			
Hannah Service Type:										
		TLC								
Veterinary Care										
Emergency Care										
BEST Program										
\$68.64 /Month	\$20.00 /Month									
\$0.00										
\$0.00 /Month										
\$0.00										
\$0.00 /Month										
Price Change History										

Note: There should be \$0.00 listed under "Flea, Tick and Heartworm Preventatives" and "Pet Food, Supply and Delivery Options". Hannah no longer offers these additional services.

- b. In the past, Hannah offered a plan option that included flea medication and/or food within the monthly rate. All of these plans should have been migrated to a new plan with an adjustment made to the monthly plan fee.



Original Plan Level: Easy Essentials	Bath and Brush	<input type="checkbox"/> -20% Discount	Bath & Brush	<input type="checkbox"/> None
	Grooming	<input type="checkbox"/> -20% Discount	Free Grooms:	<input type="checkbox"/> None
	Boarding	<input type="checkbox"/> -20% Discount	Free Days:	<input type="checkbox"/> None
\$76.59 /Month	Total Lifetime Care Monthly Fee			
\$0.00	Administration Fee (One Time)			
\$0.00	Healthy Start Fee	<input type="radio"/> Full Payments <input type="radio"/> 6 months <input type="radio"/> 12 months		
\$0.00 /Month	Intact Pet Fee (Monthly Charge until 6 months following the surgery is done)			
\$0.00	Test Trans Training	<input type="radio"/> Full Payments <input type="radio"/> 12 months		
\$0.00	Sick and Injured Care Fee	<input type="radio"/> Full Payments <input type="radio"/> 12 months <input type="radio"/> 18 months <input type="radio"/> 24 months		
\$0.00 /Month	Ongoing Care Fee (Monthly Charge for life of the Pet)			
\$0.00 /Month	Monthly Overweight Fee			
\$0.00	Behavior Care Fee	<input type="radio"/> Full Payments <input type="radio"/> 12 months		
\$0.00 /Month	Ongoing Behavior Care (Monthly Charge for life of the Pet)			
\$0.00 /Month	Monthly Special Breed Fee (Monthly Charge for life of the Pet)			
\$0.00 /Month	Monthly Size Fee			
Price Change History	Change Price			
Flea,Tick and Heartworm Preventatives:				
\$0.00 /Month	Vectra: Topical Prevention	<input checked="" type="radio"/> None <input type="radio"/> 3 months <input type="radio"/> 6 months <input type="radio"/> 12 months		
\$0.00 /Month	Activyl: Topical Prevention	<input checked="" type="radio"/> None <input type="radio"/> 3 months <input type="radio"/> 6 months <input type="radio"/> 12 months		
\$0.00 /Month	Bravecto: Chewable Prevention	<input checked="" type="radio"/> None <input type="radio"/> 3 months <input type="radio"/> 6 months <input type="radio"/> 12 months		
\$0.00 /Month	Trifexis: Chewable Prevention	<input checked="" type="radio"/> None <input type="radio"/> 3 months <input type="radio"/> 6 months <input type="radio"/> 12 months		
\$0.00 /Month	Original plan Flea,Tick and Heartworm Preventatives value	Remove		
Flea Control Change History				
Pet Food, Supply and Delivery Options:				
\$0.00 /Month	Monthly Pet Food Fee	Removed On 02/01/2019		
Additional Services:				
\$0.00 /Month	Bath and Brush	<input checked="" type="radio"/> None <input type="radio"/> 4 Times <input type="radio"/> 8 Times		
\$0.00 /Month	Pet Limo Fee	<input checked="" type="radio"/> None <input type="radio"/> 4 Times <input type="radio"/> 8 Times		
Additional Service Change History				

Note: Plans without the monthly Food Fee or Flea/Tick/Heartworm Preventatives Fee removed should be sent to the Billing Team.

7. The “Summary” displays the total Monthly Support Fee and the Pet Purchase Fee.
 - a. If the Member decides to cancel a Pet’s plan, they will be responsible for paying the remaining Pet Purchase Fee.

Summary:	
\$88.64/Month	Monthly Support Fee Total
\$0.00	Additional Fees Total
\$88.64	Total Due at Plan Start
\$350.00	Non Refundable Pet Purchase Fee
Special Terms:	
500 characters Max	
Hannah Team:	

- b. The team members involved in the plan enrollment are displayed at the very bottom of this page.

Hannah Team:
Enrollment Source: HE2  Appointment Setter: Ashlyn Hardman  Membership Coordinator: Amanda McDonald

Medical Team Member I: Medical Team Member II:

Credit Score: 0