TQH Brain
WELLNESS CENTER SOFTWARE

User Handbook & Administrator Manual

Wellness Center Software

FOR INDIVIDUALS, BUSINESSES AND CENTER TEAMS

Illustrated Server and Workstation installation, everyday workflows, Center administration and owner billing.

Edition 1.9 | Individual and Business signup | 18 October 2026

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How to use this handbook

This edition adds Individual and Business portal signup, flexible Center names and the free 30-day Elite trial. Existing installation and app guidance is retained; this document does not announce a new installer. Live billing and the forthcoming import/export update remain pending. Installation illustrations retain the earlier baseline. Older installations need the approved update to show the new controls. Membership, permissions and service status also determine what appears. Read on-screen confirmations before consequential actions.

For a new installation, start with Software installation. Existing users can go directly to Getting started or their task. Contents, PDF bookmarks, cross-references and the alphabetical index provide direct navigation.

Screenshots show actual interface layouts rendered with fictional example data in isolated documentation sessions. Installer completion pictures illustrate the screen, not a performed installation. No real clients, payments, passwords or activation codes are shown. Zoom in for details.

The everyday-user section covers working accounts. The Center-administration section covers the two administration-only accounts. The owner portal section explains customer signup and billing. TQH internal operations are deliberately excluded.

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Scope and responsibility

This is software operating guidance, not clinical advice, a treatment protocol, legal advice or certification of regulatory compliance. Staff remain responsible for professional decisions, verifying client identity, obtaining appropriate permissions and following Center policies. Screens and controls are not evidence that a payment settled, a message reached an inbox or a backup can be restored.

Do not put passwords, MFA setup keys, client-identifying information or full payment-card details in support screenshots. For assistance use the support contact supplied with your TQH agreement or the official TQH Brain website.

Edition control

Edition 1.9 updates account types, Center names, no-card trial activation and read-only access after trial expiry. Records are not deleted when the trial expires. App and installer behavior is unchanged by this portal update. This PDF is supplied separately; inclusion in the next installer follows completion and verification of Stripe and import/export work.

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SOFTWARE INSTALLATION

Start here: one installer, two roles

This chapter walks the Center owner or designated installer through a new TQH Brain installation. Use the approved **TQHBrain-Setup.exe**. The same download contains both Server and Workstation options; you do not need separate downloads for each computer.

This computer will...	Choose this role
Store the Center's records and run its background services	**Server**. Configure this computer first. It hosts the database, document storage, backup service and application. It can also be used for authorized daily work.
Connect staff to an existing Center server	**Workstation**. Configure it after the Server is working. It connects to the existing Center rather than creating a new database, Center or trial.

Single-computer and multi-computer Centers

For a single-computer Center, install **Server** on that computer and use its TQH Brain shortcut. You do not also need to install the Workstation role on the same computer simply to use the app.

For a multi-computer Center, designate one Server and install **Workstation** on the other computers. Staff accounts and shared records belong to the Center on the Server. A workstation is not an independent copy of the Center.

What to do first

Read PC requirements: platforms and scope (p. 9) and Prepare the computers and your information (p. 14), prepare the owner account in Prepare the owner account and activation (p. 15), then begin Run setup and choose the computer role (p. 16). Install and verify the Server before proceeding to Connect an additional Workstation (p. 24).

> **Existing Center or replacement server?** Do not follow a fresh-install procedure over existing records without a recovery plan. Use Update, repair or replace an installation (p. 27) for an ordinary software update, or arrange a supported migration with verified backups and recovery material. Reinstalling does not reset a trial.

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SOFTWARE INSTALLATION

PC requirements: platforms and scope

> **Tested platforms and planning figures** On October 4, 2026, the test owner confirmed passed testing on Windows 10 Home/Pro and Windows 11 Home/Pro, including these guest editions in Windows Hyper-V virtual machines. The hardware figures on the next pages remain planning baselines, not measured performance limits. Application compatibility does not replace operating-system maintenance or final release approval.

Use Server PC: minimum and recommended (p. 11) for the computer hosting the Center, including a single-PC installation. Use Workstation PC: minimum and recommended (p. 12) only for computers connecting to an existing Server. Also read Network, storage and readiness checks (p. 13).

Platform	Planning guidance and qualification status
Tested Windows desktop editions	Windows 10 Home/Pro and Windows 11 Home/Pro x64: test-owner-confirmed working. The detailed fresh 1.0.23 Center Server record is Windows 11 Pro; exact builds and every role/edition combination were not separately supplied.
Windows Hyper-V virtual environments	Testing passed in virtual machines with Windows 10 Home/Pro and Windows 11 Home/Pro guest operating systems, as confirmed by the test owner. This describes the guests, not permission or capability to host Hyper-V on a Home edition.
Server / combined installation	Use the Server role for a single-computer Center or the computer hosting shared records. Windows 11 Pro is the documented fresh-server test environment. A Workstation connects to this Server; it does not create another database.
Dedicated Windows Server	Windows Server OS has not been tested and is excluded from the current release acceptance scope. The application Server role does not require buying Windows Server OS.
Installer architecture	The supplied installer targets Intel/AMD x64 Windows. Do not assume a native ARM64, 32-bit Windows, macOS, Linux or headless Server Core installation is supported by this package.
Browser	Use an up-to-date Microsoft Edge as the initial qualification target. Confirm another browser with TQH before relying on it. Browser access to a portal is not the same as support for installing the app on that device.

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SOFTWARE INSTALLATION

Operating-system support and app sizing

The current package includes the app runtime and a PostgreSQL 18 installer for the Server. You do not need developer tools or a separate PostgreSQL installation on Workstations. Do not replace bundled components with an arbitrary newer version.

Microsoft lists Windows 11 and Windows Server among supported .NET 8 platforms. EDB lists Windows Server 2022 and 2025 for its PostgreSQL 18 installer tests; it describes comparable desktop releases as generally expected to work, not as that same tested list. These are component statements, not TQH certification. Sources: Microsoft .NET Windows support and PostgreSQL Windows installer platform support, checked September 14, 2026.

Windows 11 hardware must also satisfy Microsoft's CPU, firmware, TPM and graphics requirements. Its basic RAM/storage minimums are not TQH sizing recommendations. Do not bypass those checks or plan a new Center around an unserviced Windows release. See Microsoft Windows 11 specifications.

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SOFTWARE INSTALLATION

Server PC: minimum and recommended

This computer runs the application, database, document storage, backups and background processing. If staff also work on it, allow capacity for their browser and other applications.

> **Planning figures only** Both columns are provisional. The minimum is a starting configuration for light-use testing, not an approved limit for a busy Center or a promise of seven-user performance. Use the recommended column when planning a new purchase, after confirmation with TQH.

Component	Minimum planning baseline	Recommended planning configuration
Processor	Modern Windows-compatible x64 CPU, 4 cores.	Modern x64 CPU, 6 or more cores for headroom during reports, backups and simultaneous work.
Memory (RAM)	8 GB installed; no competing heavy workloads.	16 GB; consider 32 GB for 5-7 working users, substantial documents or other software on the Server.
Primary storage	256 GB SSD; at least 50 GB free before setup, plus space for Center data and backups.	512 GB or larger SSD, preferably NVMe; at least 100 GB free before setup, plus planned growth. Consider 1 TB or more for document-heavy use.
Local network	Reliable wired Ethernet; 100 Mbps baseline for testing.	Wired 1 Gbps Ethernet to a suitable switch/router. A single-PC Center still needs internet for connected services.
Power and availability	Stable power; Server stays awake and available when services are needed.	Dedicated always-available computer with a correctly sized UPS and a planned safe shutdown procedure.
Recovery storage	Separate approved backup destination sized for retained archives and restore work.	An encrypted off-computer copy, monitored free space and a verified recovery procedure. A UPS or second internal folder is not a backup.

Capacity is not just the installer size

Free-space figures are planning reserves, not measured installation footprints. Allow for database growth, uploaded documents, temporary exports, update files, backup archives and restore staging. If storage is split across drives, check each target and the Windows system drive. Never fill a drive to its limit.

The two administration-only accounts do not use working seats, but administrative activity can still consume server resources. Hardware does not increase the licensed 2, 5 or 7 concurrent-user allowance.

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SOFTWARE INSTALLATION

Workstation PC: minimum and recommended

A Workstation connects to the Center Server. It does not host a separate Center database. For a one-computer Center, use the Server requirements instead.

> **Planning figures only** These figures are provisional until the installed app, printing, downloads and display scaling are checked on representative hardware. Extra browser tabs, spreadsheets and other applications need additional capacity.

Component	Minimum planning baseline	Recommended planning configuration
Processor	Modern Windows-compatible x64 CPU, 2 cores.	Modern x64 CPU, 4 or more cores.
Memory (RAM)	8 GB.	16 GB for comfortable multitasking.
Storage	128 GB SSD; at least 20 GB free before setup, plus download and Windows-update space.	256 GB or larger SSD; at least 40 GB free before setup, plus normal working space.
Screen	1366 x 768 at 100% scaling is the proposed lower test target.	1920 x 1080 or higher, with comfortable text size. Confirm that dialogs remain usable at your chosen Windows scaling.
Input and graphics	Keyboard, mouse or suitable pointing device; graphics compatible with Windows.	Business monitor and ergonomic keyboard/mouse. No dedicated gaming GPU is proposed for routine TQH use.
Connection to Server	Reliable private LAN; wired 100 Mbps or stable managed Wi-Fi for testing.	Wired 1 Gbps preferred. If Wi-Fi is used, verify coverage and that the network permits reaching the Center Server.
Browser and optional tools	Up-to-date Microsoft Edge; allow required site storage, JavaScript and authorized downloads.	Managed browser updates. Compatible spreadsheet/PDF software and a configured printer if staff need those outputs.

A Workstation still depends on the Server

More memory on a Workstation will not repair an offline Server, a certificate mismatch or a disconnected network. Check the Center connection before trying another account or reinstalling. Do not install a second Server to solve a Workstation connection problem.

Excel is not required to run the main app. It or compatible software is needed to open spreadsheet exports locally; protected-file compatibility must be checked separately. See Printing, downloads and file protection (p. 89) and Connect an additional Workstation (p. 24).

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SOFTWARE INSTALLATION

Network, storage and readiness checks

Internet and local connections

Internet access is needed for owner signup, activation, membership and connected services such as the Practitioner Network, billing and email delivery. No tested minimum internet bandwidth is claimed; plan for reliable broadband and adequate upload capacity for documents and the Center's other traffic. Local Ethernet speeds are not internet-speed requirements.

Workstations must reach the actual Center Server HTTPS address, normally **https://SERVER-NAME:5001**. The PostgreSQL port, normally **5432**, is not the address users enter. Keep database access restricted and do not forward database or app ports to the public internet. Have authorized IT staff review any remote-access design.

Protect availability and recovery

- Keep the Server powered and connected during scheduled reminders and backups, not just while a user has the app open. Plan Windows restarts and maintenance outside active work.
- Use approved storage and access controls. Retain protected backup copies away from the Server and store the required recovery material separately. See Configure and verify backups (p. 77) and Protect the portable recovery key (p. 79).
- Monitor free space on the Windows, database, document and backup locations. Size retention from actual archive sizes; no fixed disk capacity guarantees a number of years of records.
- For a VM, allocate the proposed CPU and RAM to the guest and leave capacity for the host and other VMs. Avoid storage overcommit. A VM snapshot is not a substitute for a verified TQH backup.

Check your computer before installation

1. In Windows **Settings > System > About**, note the processor, installed RAM, system type and Windows edition/version. Do not include device identifiers or credentials in a public screenshot.
2. Check each intended drive's free space in File Explorer. Confirm the disk type and backup destination with IT if unclear.
3. Check screen resolution and scaling, the browser version, the intended Server name and network connection. Verify certificate trust using Verify the Server certificate before trusting it (p. 25).
4. During acceptance, exercise the expected 2, 5 or 7 working-user load with representative synthetic records, reports, documents and background processing. Verify reboot, backup/restore and display behavior; review response times, memory and storage pressure.
5. Record the accepted configuration and obtain TQH confirmation before treating provisional figures as final requirements. If response times are poor, investigate the workload, network and storage rather than assuming RAM alone is the cause.

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SOFTWARE INSTALLATION

Prepare the computers and your information

Have the following ready before opening setup. Ask the Center's authorized IT contact for help with Windows, networking or storage choices you are unsure about.

Prepare	Why it is needed
Approved Windows x64 computer	Use a Windows edition and hardware configuration approved for your release. Confirm free space for the app, database, documents and growing backups. Do not assume a full drive can accommodate setup.
Windows administrator access	Installation and certificate trust need Windows permission to change this computer. A TQH app administrator login is not a Windows administrator account.
Stable power and network	Keep the Server powered and reachable. Avoid sleep/shutdown during configuration, updates, backups or reminder processing. Workstations need a reliable route to the Server.
Internet access and a browser	Owner signup, activation and connected services require their online endpoints. The application opens in a browser; cloud-service availability is separate from the local server connection.
Owner mailbox and verification method	Keep access to your owner mailbox. Each sign-in needs an email code or your enrolled authenticator. Do not share the owner login.
Secure credential storage	Prepare a local administrator password and a separate database administrator password. Keep these and the owner login in approved secure storage, not in this handbook or shared notes.
Server name and storage plan	Record the intended Windows computer name and document/backup locations. Additional workstations will use the Server's HTTPS address.

Before a reinstall or update

Save work, sign users out and preserve a verified backup plus the necessary recovery material. Do not delete the old data, keys or certificates to make setup look like a first install. A backup stored only on the computer being wiped will be lost with it.

> **Network boundary** This setup is for the Center's approved network. Do not expose the database or forward app ports to the public internet. Ask qualified IT support about any required remote-access arrangement.

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SOFTWARE INSTALLATION

Prepare the owner account and activation

The customer portal account belongs to the Center owner. It manages signup, billing and installation activation. It is separate from the local administrator account you create later in the Server wizard.

1. Open the customer portal through the official TQH Brain website or your verified portal link. For account creation and recovery see Customer account and secure signup (p. 82).
2. Sign in and confirm your owner email address. Under Account security, select Send Email Code (default) or Set Up Authenticator. Complete code verification before continuing; it cannot be skipped.
3. Complete and save the Wellness Center profile. Check the Center name, contact and address information before proceeding; the Server imports the customer profile during activation.
4. Review the free 30-day Elite trial information. No credit card is required for trial registration, download or activation. No subscription or charge starts automatically.
5. Under **Download & activate**, create an activation code when the portal says the account is eligible. Use the code for the intended Center and respect its displayed expiry.
6. Obtain the approved full installer through the offered download or the release link supplied by TQH. Verify the expected version before using an older file retained in Downloads.

Keep the activation code private

Copy the full code into the Server wizard when asked. Avoid added spaces or missing characters. Do not put it in screenshots, tickets, printed instructions or an email to other staff. A Workstation does not require a second Center activation code.

> **Current illustrated release** The installation pictures in this edition show 1.0.16, an unsigned sandbox-test release. Use only approved test payment details during testing. Do not enable live billing to make a sample screen match this handbook.

Trial eligibility belongs to the customer/Center, not to the installer file. An eligible trial begins at successful activation. Downloading again, uninstalling or wiping a computer does not create a new trial. If the portal blocks a step, resolve its specific message rather than creating duplicate accounts or Centers.

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SOFTWARE INSTALLATION

Run setup and choose the computer role

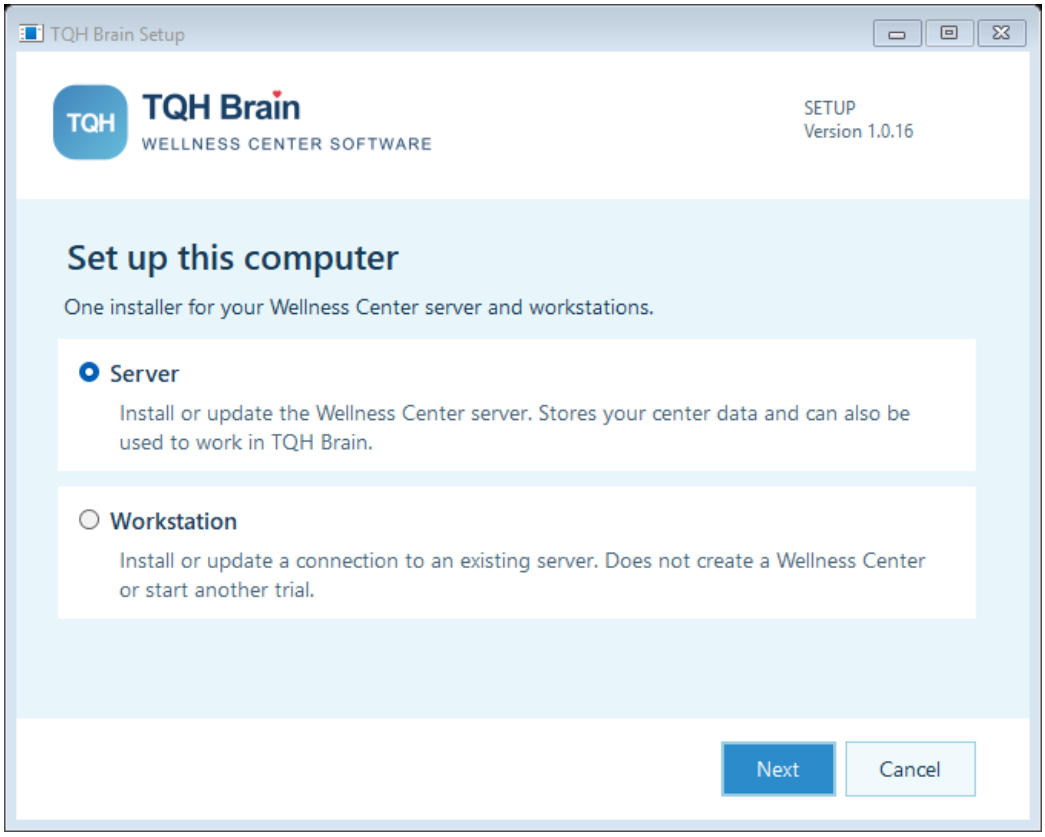

Figure 1. The actual 1.0.16 role-selection screen. Server is selected in this example; the same file also installs Workstations.

1. Save the complete **TQHBrain-Setup.exe** to the computer. Open it from File Explorer; do not launch an incomplete download or a previous hotfix in its place.
2. Read **Set up this computer**. On the designated first computer, choose **Server**. On an additional computer connecting to that Server, choose **Workstation**.
3. Select **Next**. Review the role on the following screen before continuing. **Cancel** leaves the selection without starting installation.

The blue TQH icon and displayed version help identify the file, but branding alone is not proof of trust. Use the approved source and release information.

> **Windows warning** This test release is unsigned. If Windows or organizational policy blocks it, stop and give the exact warning to your authorized IT contact or TQH support. Do not disable protection, use another person's administrator account or assume an unknown download is safe.

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SOFTWARE INSTALLATION

Install the files, then open configuration

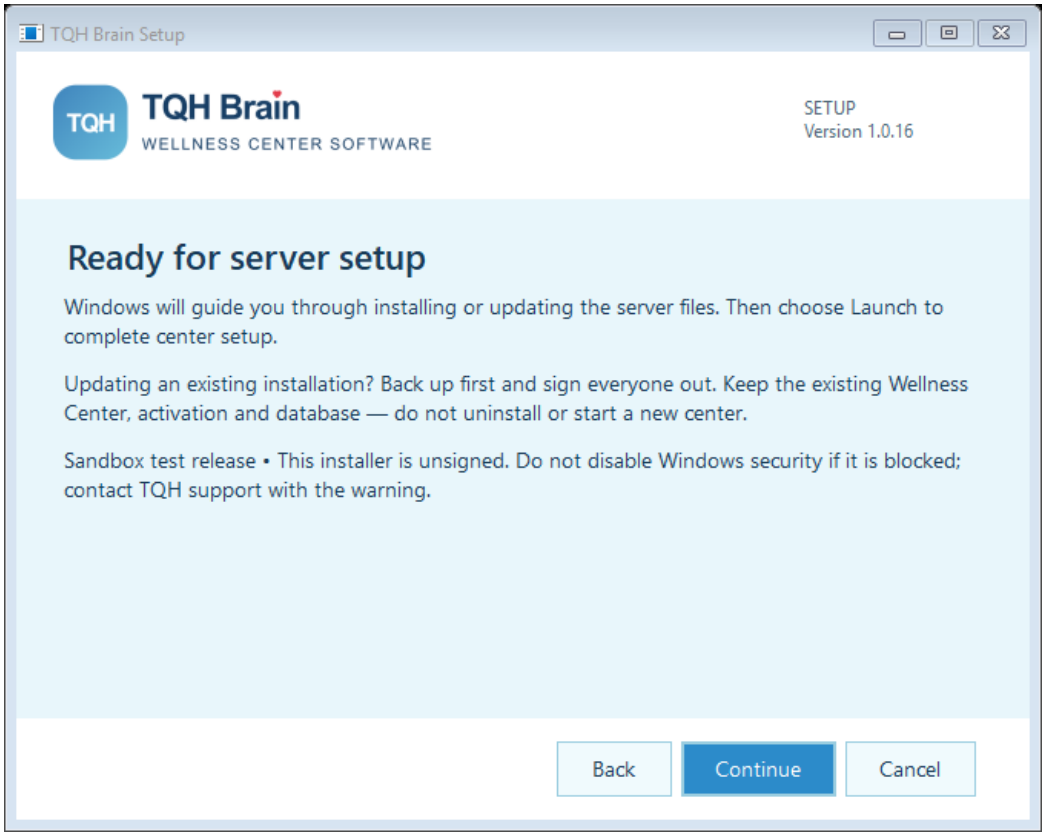

Figure 2. Role review before package installation. This screen is not the final Server configuration wizard.

1. Confirm the review heading says **Ready for server setup** or **Ready for workstation setup**, as intended. Use **Back** to correct the role; select **Continue** when ready.
2. A separate installation window opens. Follow its instructions and approve Windows elevation only for the expected TQH installer. Keep the original window open while it works.
3. At successful package completion, choose **Launch** to open TQH Brain Setup. If a restart is required, restart first, then open **TQH Brain Setup** from the Windows Start menu.
4. If the package window was closed before Launch, use the same Start-menu setup entry. Do not start a second Server installation merely to find the configuration wizard.

Installing files and configuring the Center are separate stages. The app is not ready just because the file-installation window closed. Server configuration follows five steps; a Workstation instead opens a connection screen.

For a missing setup entry, inactive Launch button or incomplete installation see Installation problems and safe next steps (p. 28).

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SOFTWARE INSTALLATION

Server step 1: connect your Wellness Center

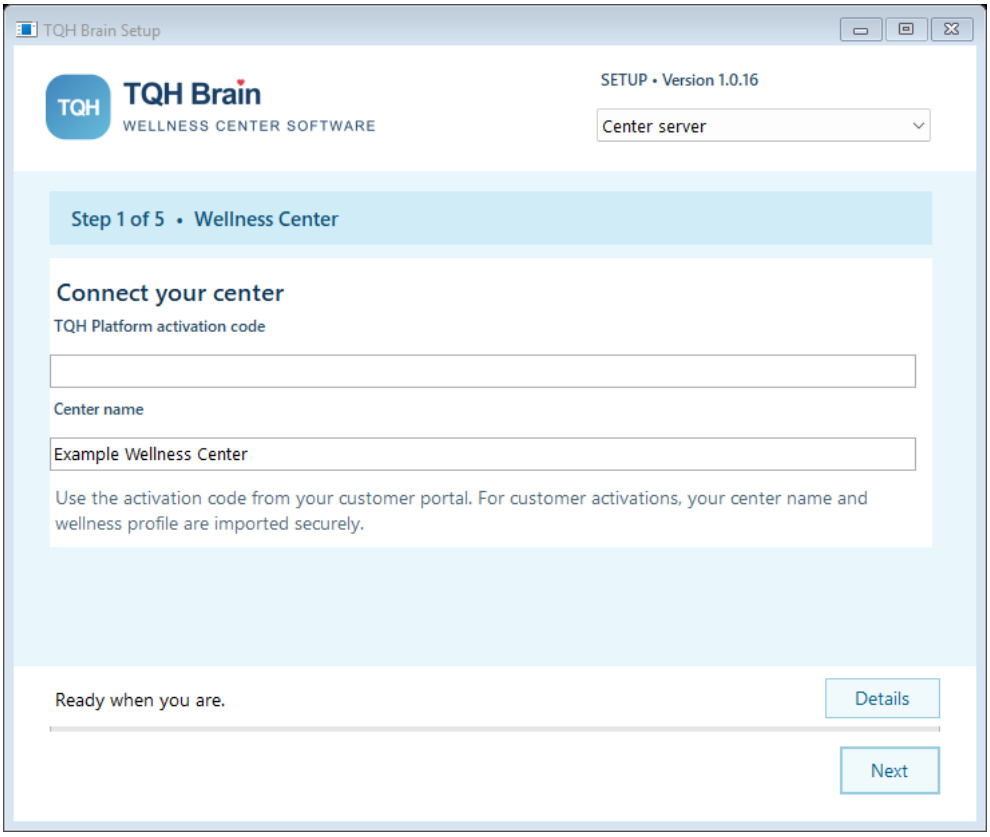

Figure 3. Wellness Center step with fictional Center information and an intentionally blank activation-code field.

1. Confirm the top-right mode is **Center server** and the step is **1 of 5 - Wellness Center**.
2. Paste the full portal code into **TQH Platform activation code**. Check for missing characters or accidental spaces without exposing the code to anyone else.
3. For customer activation, **Center name** becomes an imported/read-only value or placeholder. The Center name and wellness profile come from the portal; do not create a differently named local Center to bypass the import.
4. Select **Next** to proceed to the administrator step. If validation reports a missing or invalid code, correct that field or check the code's portal expiry.

Do not enter another Center's code. If the imported identity is wrong, stop and correct the owner profile or seek support before configuration.

> **Activation is not yet complete** Advancing past this screen is not proof of successful online activation. The final configuration step performs the remaining setup and enrollment. Follow the actual completion result.

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SOFTWARE INSTALLATION

Server step 2: create the administrator

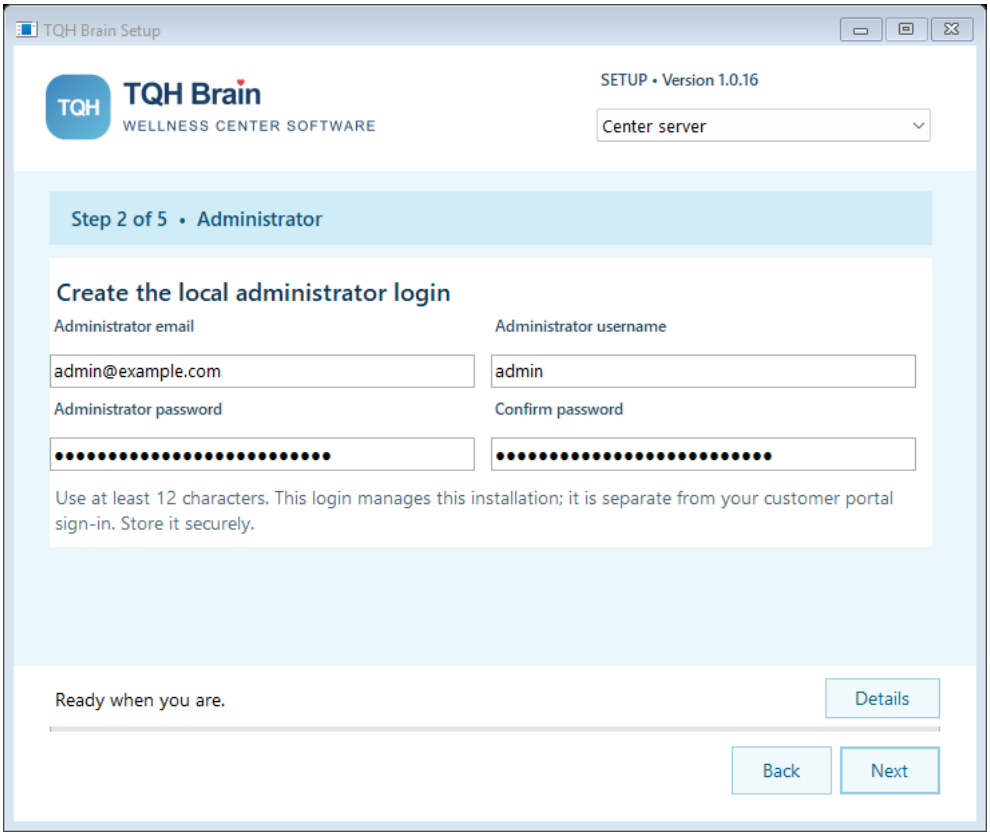

Figure 4. Administrator step with an example email and masked, fictional password. Do not copy example credentials into a real installation.

1. Enter **Administrator email** for the authorized person managing this Center's local installation.
2. Review **Administrator username**. The initial suggested username is **admin**; use the Center's approved naming convention.
3. Enter a strong **Administrator password** of at least 12 characters, then repeat it exactly in **Confirm password**. Store it securely. Do not reuse the portal or database password.
4. Select **Next**. If the entries do not match or fail validation, correct them before continuing.

This becomes the first **Primary Administrator**, an administration-only account. It manages settings, users, security, backups and audit functions; it must not be used for ordinary client or Practitioner work.

The owner portal and local app can use the same email but have separate passwords and Authenticator enrollment. Create individually authorized working users after configuration; see Add and maintain staff accounts (p. 70) and Your account and your role (p. 29).

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SOFTWARE INSTALLATION

Server step 3: prepare the database

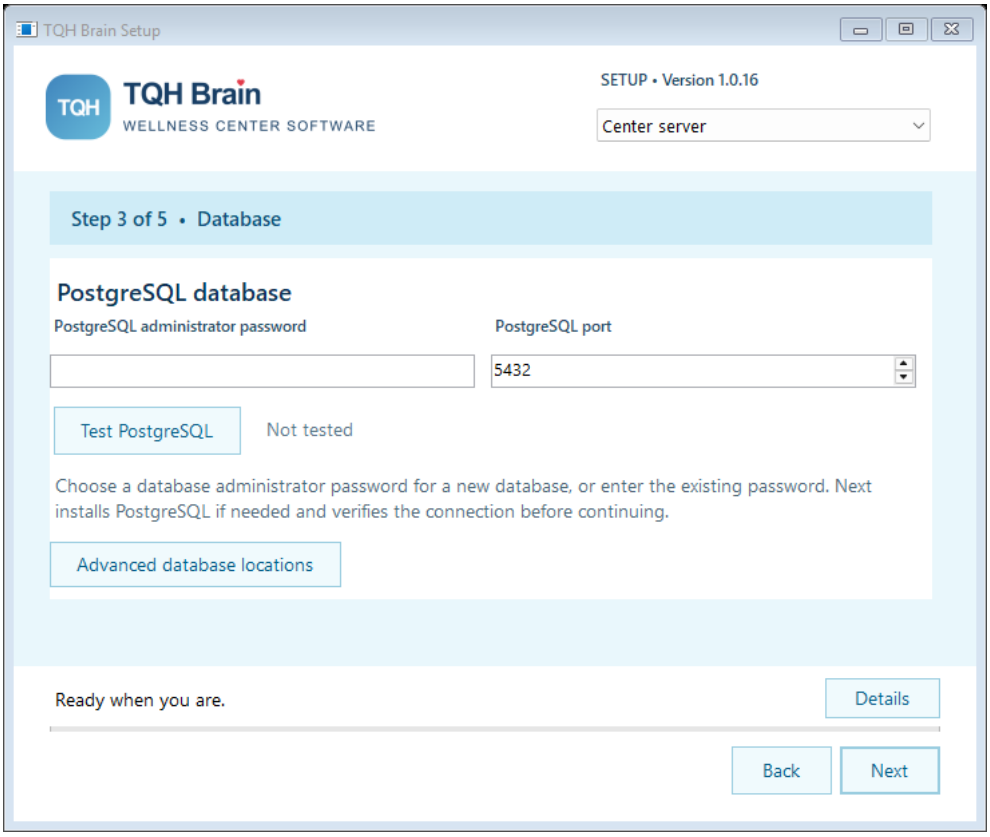

Figure 5. Database step. The administrator password is blank in this illustration; 5432 is the suggested database port.

1. For a new database, choose a strong **PostgreSQL administrator password**. For a previously installed PostgreSQL instance, enter its existing administrator password instead of inventing a replacement.
2. Leave **PostgreSQL port** at **5432** unless your authorized IT contact has deliberately chosen another port. This is not the Workstation's app address or HTTPS port.
3. **Test PostgreSQL** checks an existing database connection. On a new computer, use **Next**: setup installs the bundled PostgreSQL when needed, verifies the connection, and advances only when ready.
4. Keep setup open while installation or verification is running. Read the status; if it reports **Not ready**, open **Details** and resolve the stated problem before retrying.

Advanced database locations is for a deliberately different PostgreSQL installation or installer location. Keep defaults unless you have verified instructions; do not run another PostgreSQL installer at the same time.

The database password is separate from an app login. Setup uses it to provision the restricted application database account; retain it securely for authorized database administration.

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SOFTWARE INSTALLATION

Server step 4: choose secure storage

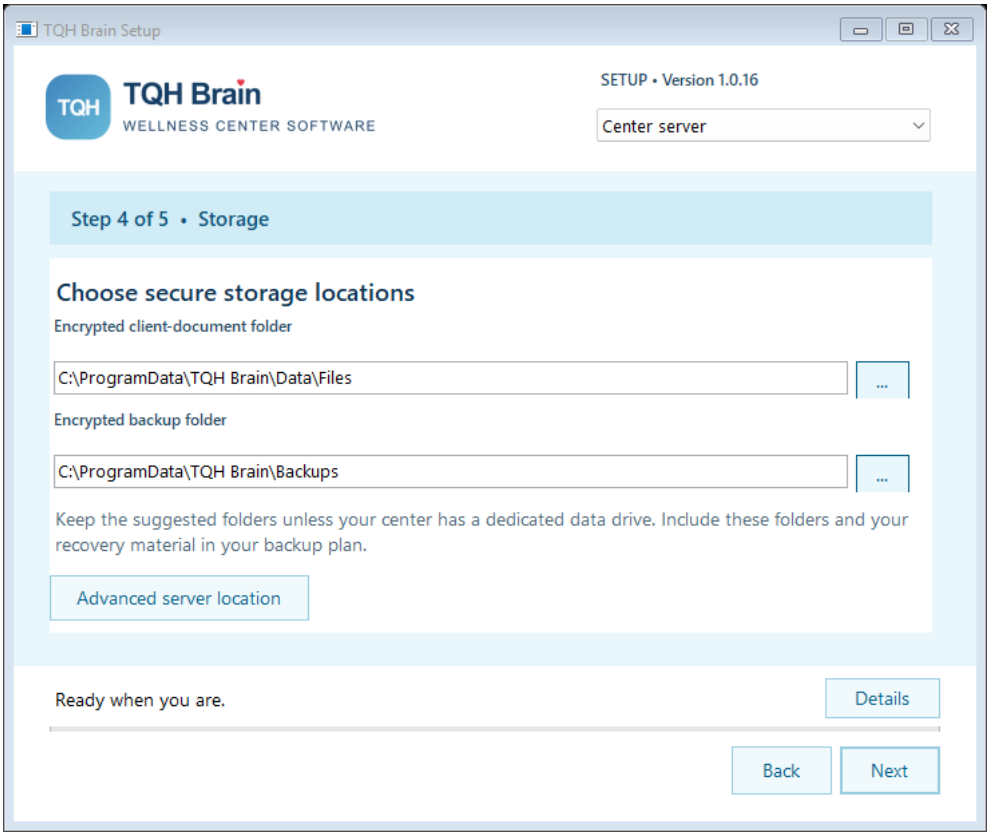

Figure 6. Default document and backup locations. The small browse buttons choose folders; they do not verify your whole recovery plan.

1. Review **Encrypted client-document folder**. The default is C:\ProgramData\TQH Brain\Data\Files on the Server.
2. Review **Encrypted backup folder**. The default is C:\ProgramData\TQH Brain\Backups.
3. Keep the suggested folders unless the Center has a planned dedicated data drive. Use the browse button for each field if an authorized alternative is required. Confirm the intended drive is available.
4. Select **Next** after checking both destinations. Use **Advanced server location** only with approved instructions; it points to the installed server program, not a second data location.

The default backup folder is on the same computer as the live data. It does not protect against losing that whole computer or drive. After installation, configure and verify the Center's backup and recovery procedure, including protected copies off that device.

Do not place sensitive storage in a public shared folder or casually move the folders in File Explorer after setup. See Configure and verify backups (p. 77), Protect the portable recovery key (p. 79) and Validate and restore safely (p. 80).

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SOFTWARE INSTALLATION

Server step 5: review and configure

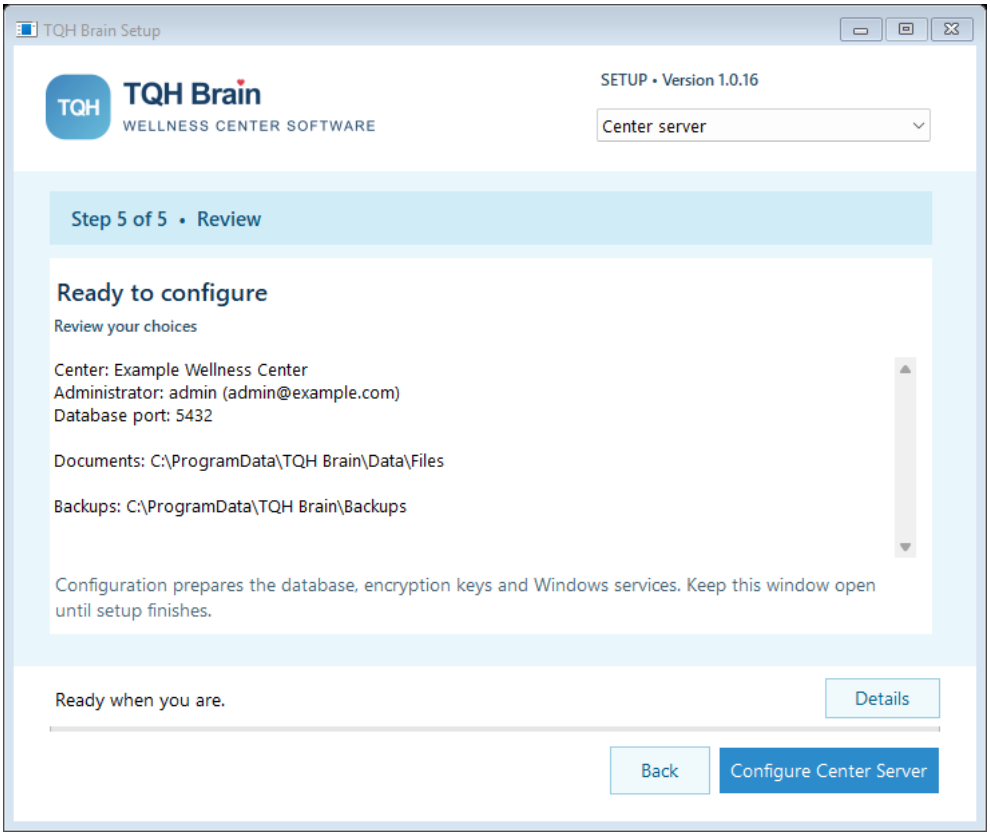

Figure 7. Review step with fictional administrator details. Passwords are intentionally excluded from the review summary.

1. Read **Review your choices**. Confirm the Center, administrator email, database port and document/backup paths. Scroll within the summary if necessary.
2. Use **Back** if a value is wrong. Return to this final step and recheck before proceeding.
3. Select **Configure Center Server** once. Setup prepares the database, creates the required encryption material, configures Windows services and HTTPS, and completes the applicable online activation.
4. Keep the computer powered and the window open. Read the status line; use **Details** for the fuller progress or error message. Do not launch another configuration window while this operation is running.
5. Wait for the actual successful completion result. A moving progress bar or an earlier completed stage is not proof that every stage finished.

If cancellation is necessary, use the setup controls and wait for the safe result rather than forcing the process to close. A committed customer import can be retained for retry; cancellation is not a promise to erase everything. See Installation problems and safe next steps (p. 28) if the outcome is uncertain.

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SOFTWARE INSTALLATION

Finish setup and sign in for the first time

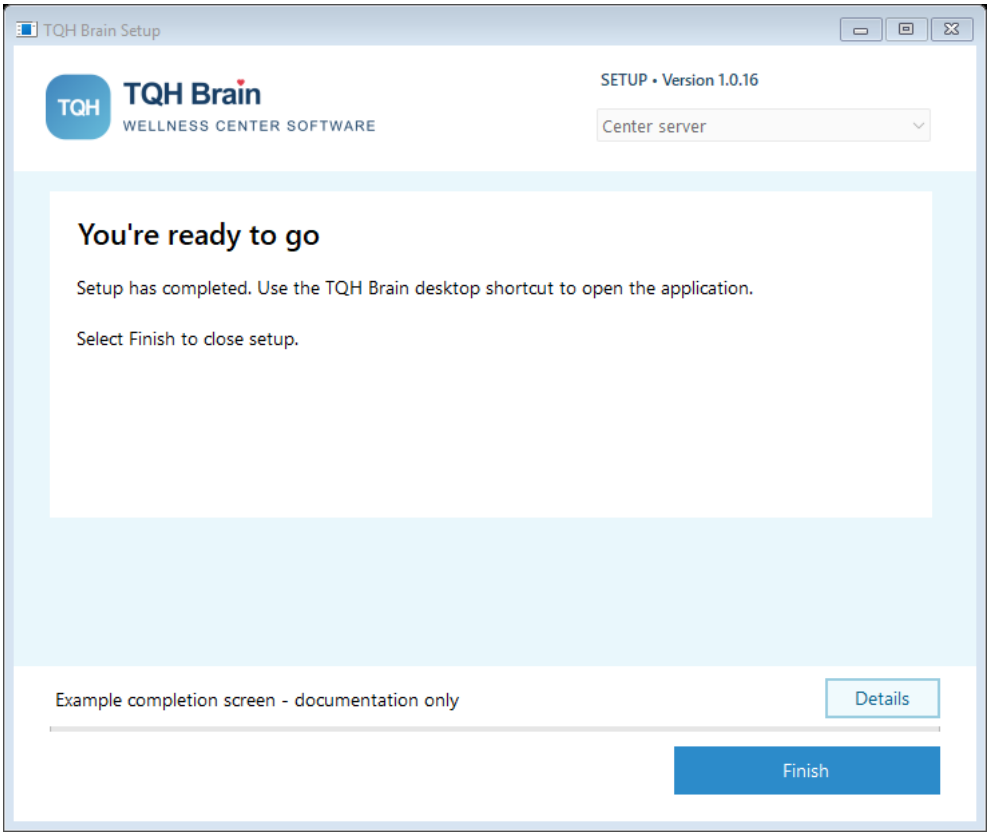

Figure 8. Example completion layout, rendered without performing an installation. On your computer, continue only after its real successful result.

1. If setup offers to open TQH Brain, accept when ready. Use **Finish** to close the completed wizard.
2. Open the blue **TQH Brain** desktop shortcut. On the Server, the normal local address is **https://localhost:5001/login.html**.
3. Sign in with the **local administrator email and password created in step 2**, not automatically the portal password. Complete the prompted password change and Authenticator setup; see Sign in and secure your account (p. 31) and Authenticator and sign-in recovery (p. 32).
4. Confirm you reach **Center Administration**, then review the Center profile and connection state. Complete any required profile fields before onboarding staff.
5. Create the permitted individual working accounts through administration. Sign out of the administrator account and use a working account for client-facing functions.

The first administrator does not use a paid working seat, but also does not gain working-module access. Verify the installation using Check the installation before daily work (p. 26) before staff begin entering records.

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SOFTWARE INSTALLATION

Connect an additional Workstation

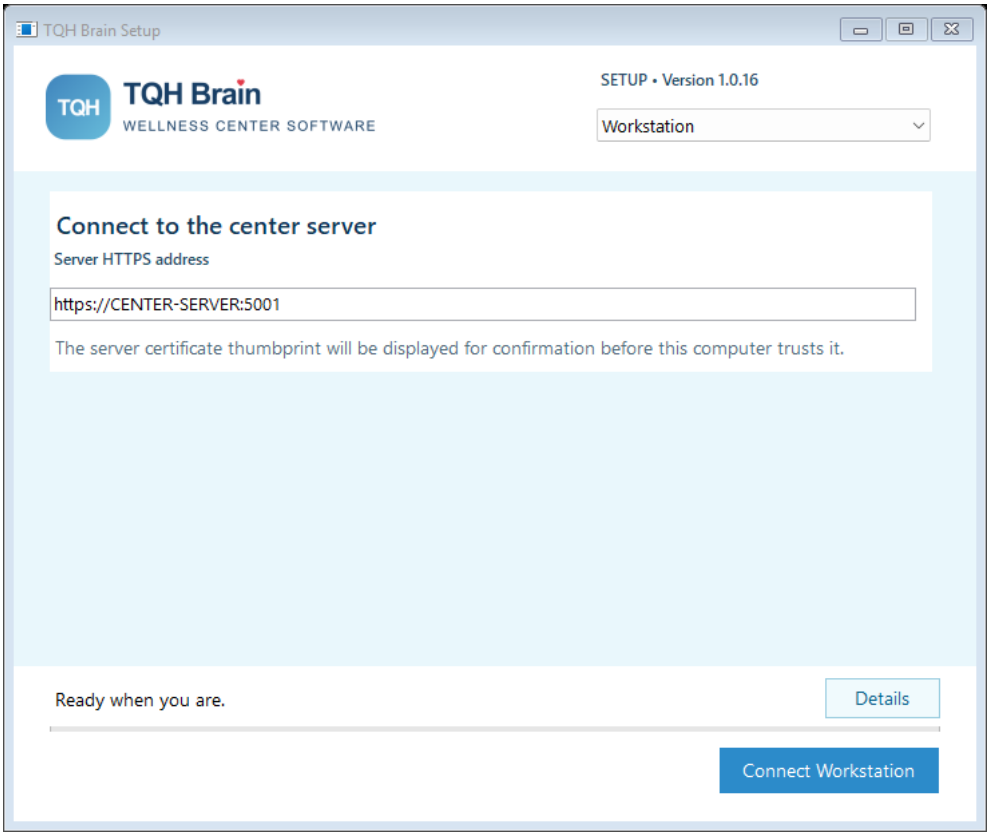

Figure 9. Workstation connection screen. CENTER-SERVER is an example name; replace it with your real Server name.

1. Confirm the Server is fully configured, powered on and reachable from this computer. Obtain its verified HTTPS address from the Center administrator.
2. Run the **same TQHBrain-Setup.exe**, choose **Workstation**, select **Next**, review and continue. At package completion select **Launch**, or open **TQH Brain Setup** from Start.
3. Confirm the mode is **Workstation**. In **Server HTTPS address**, enter **https://YOUR-SERVER-NAME:5001**, replacing the example with the real Windows Server name. Use an approved LAN IP only when directed by IT and compatible with its certificate.
4. Select **Connect Workstation**. Verify the certificate prompt as described in Verify the Server certificate before trusting it (p. 25) before approving it.
5. Wait for the encrypted connection check and success result, then select **Finish**. Close existing browser windows and open the blue desktop shortcut. Sign in with a Center-issued app account. Stop and ask for help if a certificate warning appears.

> **Do not use localhost here** On a Workstation, localhost means that Workstation itself, not the Server. Do not enter port 5432 or create another Center to work around an incorrect address.

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SOFTWARE INSTALLATION

Verify the Server certificate before trusting it

The **Trust Center Server** prompt displays the Server name, certificate **Thumbprint** and expiry. Trust is a security decision; seeing the TQH name is not enough to prove that the connection is to the correct computer.

Confirm with the Server administrator

1. Check that the prompt names the Server you intended to connect to.
2. Obtain the expected certificate thumbprint through a trusted route, such as directly from the authorized person at the Server. Do not rely only on information supplied by an unexpected prompt.
3. On the Server, the public certificate created by setup is normally **C:\ProgramData\TQH Brain\Public\TQHBrainServer.cer**. An authorized person can open this certificate and read its **Details > Thumbprint** and validity dates. Opening it to view details is not an instruction to install or replace it.
4. Compare the complete thumbprint with the Workstation prompt, using the same thumbprint type. Spaces and letter case may differ; the underlying value must match. Also verify the expected Server and expiry.
5. Choose **Yes** only after successful verification. Setup then trusts the certificate on that Windows computer and checks the HTTPS login page. If the values differ, are expired, or cannot be verified, choose **No** and ask for help.

After trust

Open the TQH Brain shortcut and check for a valid encrypted connection without an unresolved browser certificate warning. If the address or certificate changes later, investigate why; do not routinely bypass warnings or remove trust settings at random.

> **Public certificate versus private keys** A public .cer certificate/thumbprint is not the same as the Server's private .pfx certificate or encryption key. Never send private keys, certificate passwords or security files with a routine support screenshot.

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SOFTWARE INSTALLATION

Check the installation before daily work

Use these checks after the Server and each Workstation are configured. A successful package installation is only one part of readiness.

Check	Expected result
Desktop shortcut and address	The blue TQH Brain shortcut opens the intended Center over HTTPS. A Workstation points to the real Server, not its own localhost.
First administrator	The setup-created account completes required sign-in security and opens Center Administration, not working modules.
Working user	An individually authorized account opens the user Dashboard and only the functions allowed by membership and permissions.
Center Connection and versions	The Dashboard identifies the real Server and verified connection. Check Server/App versions beneath Center Connection; in Settings, look below Logout. Server and App versions can differ; use the release instructions for expected versions.
Shared Center	The Workstation sees the same Center and permitted shared records as the Server. It has not created an independent trial or Center.
Background services	On the Server, the Windows Services app lists TQH Brain Server and TQH Brain Backup Service. Ask the administrator to verify their running state and recovery after reboot.
Online features	Platform/Network, billing and email readiness show their actual status. A local Connected indicator does not prove every online service is working.
Backup and recovery	Review the backup destination, schedule and recovery-key procedure. Verify a usable recovery method before relying on the installation.

After saving work and arranging a suitable time, restart the Server and a Workstation and repeat the connection checks. Keep the Server available for scheduled operations. Test reminder configuration separately; installation alone does not opt every client into email reminders.

Record the version and installation date without putting passwords or activation codes in the record. Report failures with the exact action and message; do not mark checks successful merely because the screens resemble these examples.

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SOFTWARE INSTALLATION

Update, repair or replace an installation

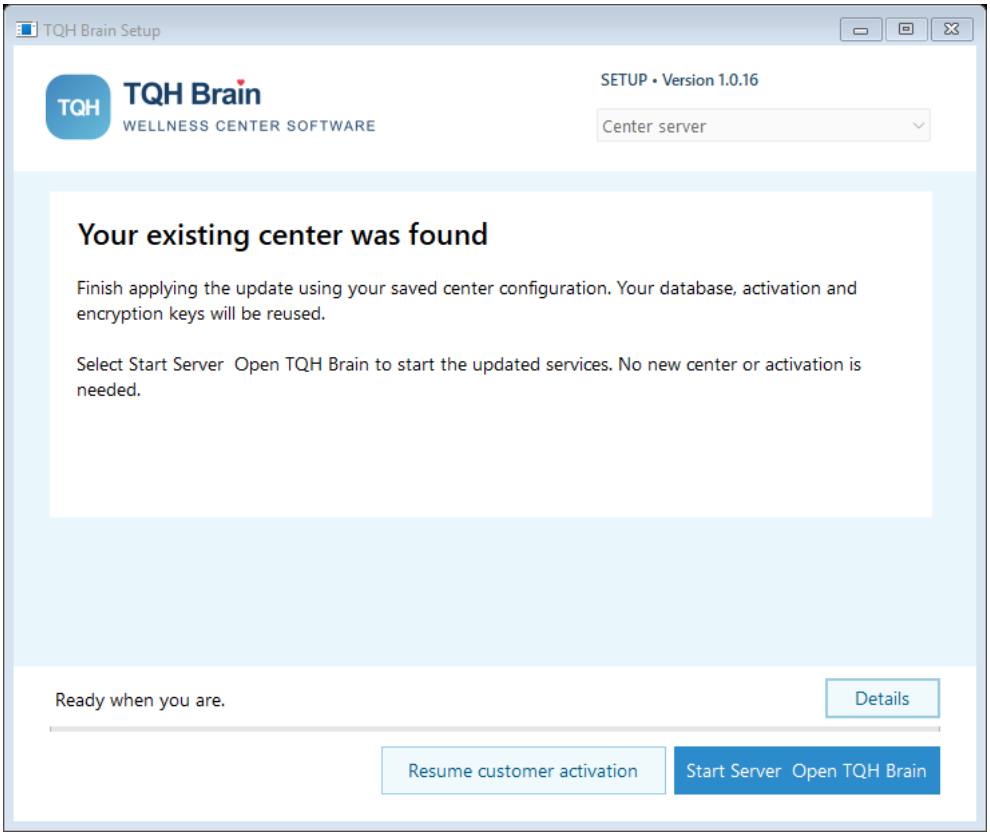

Figure 10. An existing configured Center is detected. This path reuses the saved Center configuration rather than requesting a fresh Center.

Ordinary update

1. Arrange a maintenance period, save work and sign everyone out. Verify the current backup and necessary recovery material first.
2. Run the approved newer full installer on the Server, choosing **Server**. Keep the existing Center, database and activation. Do not uninstall first unless given a specific supported instruction.
3. Open Setup after installation. If **Your existing center was found** appears, select **Start Server & Open TQH Brain** and wait for the result.
4. Update Workstation components as directed for that release, using **Workstation** and the existing Server connection. Verify versions, permissions and shared data afterward.

Repair is for an identified installation problem, not for resetting a trial or clearing records. Uninstall preserves data and recovery material; reinstalling is not a clean data reset.

A replacement Server requires coordinated backup/restore and activation recovery. See Validate and restore safely (p. 80). Do not erase the original computer or keys until the replacement is verified. **Resume customer activation** is for an incomplete customer activation, not an ordinary new-trial button.

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SOFTWARE INSTALLATION

Installation problems and safe next steps

Symptom	What to check before retrying
Launch does nothing / Setup not visible	Wait for the package result and check whether a restart was requested. Open TQH Brain Setup from Start. If the setup entry or required executable is missing, preserve the installer result/logs and contact support; do not copy random development binaries into Program Files.
Activation rejected or incomplete	Recheck the correct owner account, profile, required setup state and code expiry. Use the original code with Resume customer activation when specifically applicable. Do not delete local records or create a second Center to remove the message.
Database password not accepted	Use the existing PostgreSQL administrator password if PostgreSQL already exists. Confirm its port and instance with IT. Do not delete or reinitialize the database to bypass authentication.
Database preparation is Not ready	Open Details. Check the specific password, port, permissions, prerequisite or space error. Do not run two PostgreSQL installers or configuration windows simultaneously.
Workstation cannot connect	Verify the real Server address and port, Server power/services, network reachability and certificate. localhost on a Workstation is wrong. Have IT inspect approved firewall rules; do not disable the firewall.
Certificate mismatch or browser warning	Stop. Verify Server identity, thumbprint, validity dates and computer clocks. Use Verify the Server certificate before trusting it (p. 25), not a browser warning bypass.
Old screen, wrong version or missing function	Save work and reopen the correct shortcut/address. Check Server and App versions, membership and permissions. A denied function is not necessarily a failed installation.
Setup interrupted or outcome unclear	Preserve the exact status. Do not force another configuration, rotate keys or wipe data. Ask support which completed stage can be resumed safely.

Information to provide to support

Include the installer version, Server/Workstation role, Windows version, action, time and exact error. **Details** and installer logs from the Windows temporary folder can help; review/redact private values before sharing. Do not send activation codes, passwords, MFA keys, private certificates or client records.

For account, report and everyday app issues, see Resolve common access and display problems (p. 90).

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GETTING STARTED

Your account and your role

TQH Brain separates the owner's online account from the accounts used inside a Wellness Center. Use the right account for the task; having the same email address does not make these accounts interchangeable.

Account	What it is for
Customer portal owner	Center signup, email verification, Authenticator setup, activation, payment method and membership management.
Working Practitioner	Client work and the operational modules permitted by the Center administrator and membership. Staff can have individually assigned permissions.
Primary Administrator	The first administration-only account created during Server setup. Manages Center settings, users, security, backups, membership information and audit reporting.
Secondary Administrator	An additional administration-only account for authorized Center administration. It is not a free working Practitioner seat.

Concurrent access

CORE includes 2 concurrent working users, PRO includes 5, and ELITE includes 7. Two separate administration-only places are available, including the Primary Administrator. The working limit counts people using the app concurrently, not simply the number of computers or registered staff accounts.

A working account has one active sign-in session. Signing in again on another computer replaces its previous session, which can no longer access the server. Save your work and use **Logout** before changing computers; unsaved changes are not transferred. Use a separate account for each person. If the server cannot confirm logout, the sign-in screen warns you that the seat release has not been confirmed.

- Sign out when you finish to release access promptly. Disconnected sessions normally stop counting after approximately three minutes.
- Do not share logins or use an administrator account to work around the working-user allowance.
- Administrator-only accounts cannot use client, scheduling, session, financial-report or Network working tools. A working user who needs financial access must receive the specific permission.

> **Remember** A membership enables a module; a permission enables your action in that module. Both may be required. See Assign permissions deliberately (p. 71).

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GETTING STARTED

Membership and module availability

The table summarizes the current package structure. It is an access guide, not a billing quotation. Review the actual plan and amount in the owner portal before confirming a purchase or change.

Module or allowance	CORE	PRO	ELITE
Concurrent working users	2	5	7
Separate administration-only places	2	2	2
Dashboard, clients and profiles	Included	Included	Included
Session Builder and program library	Included	Included	Included
Practitioner Network and referrals	Included	Included	Included
Scheduler and room scheduling	-	Included	Included
Document Center, packages and Messages	-	Included	Included
Inventory, Reports and Marketing	-	-	Included
Appointment email reminders	-	With Scheduler	With Scheduler

The normal location allowance is one operating location. ELITE is the featured “Most Popular” package. Additional account permissions and service readiness still apply to included modules.

Trial and paid access

The 30-day trial provides ELITE access with 7 working users. It begins at the first successful installation activation, not merely when the owner creates an online account. Reinstalling does not start a new trial.

Saving a preferred plan or a card is not a subscription purchase. A subscription requires explicit confirmation through the portal and its checkout. After the 30-day trial ends without a subscription, the app switches to read-only: existing records remain available to view and are not deleted. Network access requires an active entitlement. Expired paid access also restricts working access. An already-paid bulletin ad may finish its approved purchased run.

> **If a module is missing** Check your membership and permissions with the Center administrator. Do not assume reinstalling will change your entitlement. See Membership, license and payment details (p. 81) and Subscribe, upgrade or cancel renewal (p. 87).

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GETTING STARTED

Sign in and secure your account

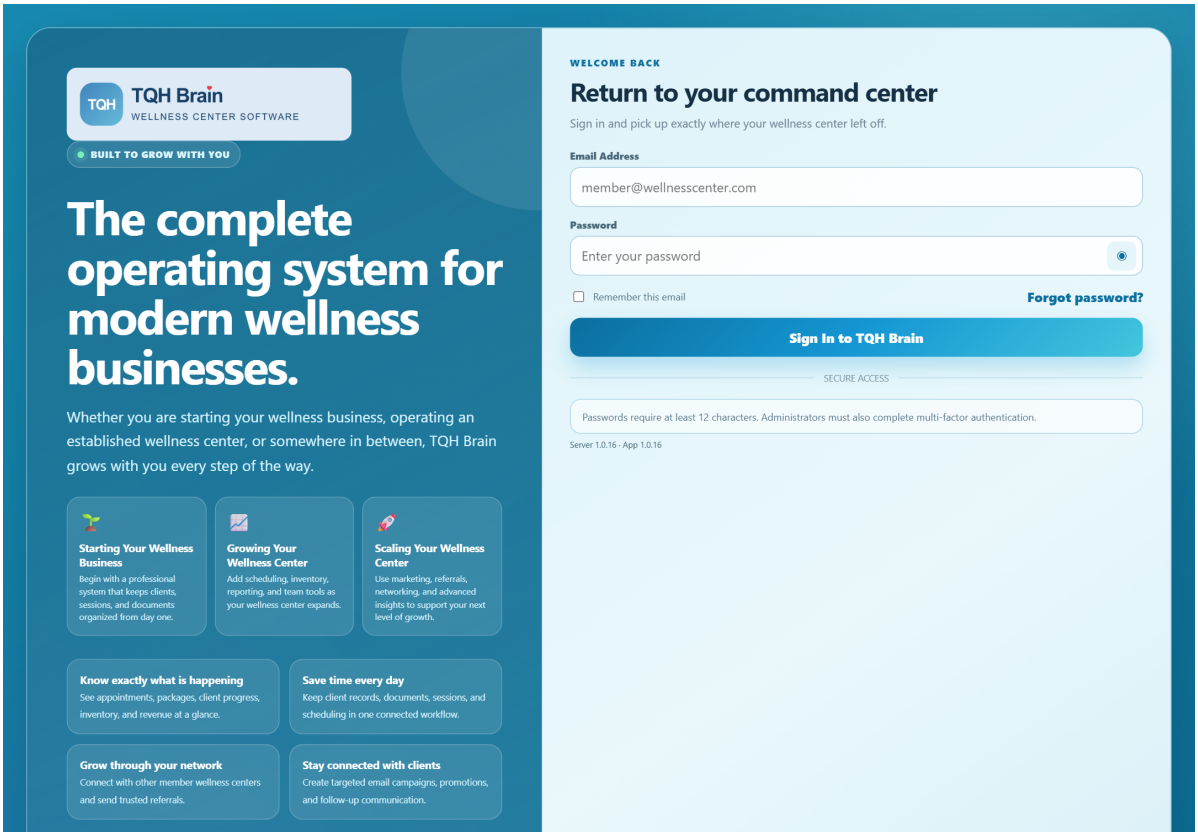

Figure 11. App sign-in screen. Use your Center-issued app credentials, not automatically your customer portal password. Example interface only.

1. Open the TQH Brain desktop shortcut or the Center address supplied by your administrator.
2. Enter your app email address and password. “Remember this email” remembers the email, not a shared authenticated session.
3. Select **Sign In to TQH Brain**. If a temporary password must be changed, enter and confirm a new password that meets the displayed requirements.
4. Complete the requested verification. Administrators open Center Administration; working users open the user Dashboard.
5. If the Center Profile is incomplete, the first administrator must complete it before staff can continue.

Use **Forgot password?** for the reset process. If email delivery or MFA access is unavailable, contact your Center administrator. Do not create another owner account to fix an app login problem.

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GETTING STARTED

Authenticator and sign-in recovery

First Authenticator setup

1. Sign in until the **Protect Your TQH Brain Account** prompt appears.
2. Choose **Email verification code** (the default in the next updated installer) or an authenticator app, then select **Set Up This Method**. Existing enrolled methods remain unchanged.
3. For Email, enter the code sent to your account email. For Authenticator, add an **Other account** in a compatible app and scan the QR code, or enter the setup key manually.
4. Enter the current six-digit code and select **Verify & Continue**. Finish any required password change.
5. On later sign-ins, use the current six-digit code from that account. If the app offers email verification instead, use the code sent for that sign-in.

> **Protect the setup key** A QR code or manual Authenticator setup key is sensitive. Do not print it in training materials, send it to support, or share it with another employee.

If verification fails

- Confirm you selected the correct Authenticator entry. The portal and the local app can have separate enrollments.
- Check that your phone’s date and time are automatic, then try the next code once.
- Check the mailbox and junk folder when using email codes. Never ask another person for their code.
- If the device is lost, contact the Center administrator for an authorized MFA reset. Verify your identity through the Center’s established procedure first.

Ending work safely

Save your work, use **Logout** or **Sign out**, and lock Windows when leaving the workstation. Closing a tab is not the same as explicitly signing out. Automatic logout follows Center policy; do not rely on it to save an unfinished form.

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GETTING STARTED

Your first working day

Use this short sequence after your administrator has created your working account and completed Center setup.

1. Sign in and complete your password/MFA steps. Confirm your displayed identity.
2. Check **Center Connection** on the Dashboard. Confirm the expected Server and a recent successful check.
3. Open **Client List**. Search before creating a new record to avoid duplicates.
4. Select the correct client and review the Client Profile, alerts and notes before starting work.
5. If Scheduler is included, review today's appointments, room and Practitioner assignments.
6. Build and save the session to the correct client chart. A draft or printout alone is not a saved chart entry.
7. Review any product movements or payment records relevant to your role. These are separate from TQH subscription billing.
8. Resolve or hand off any Priority Queue items you are authorized to handle. Sign out when finished.

Navigation conventions

The Dashboard uses a left navigation area and Quick Actions. Most other pages use a **Menu** dropdown near the page title. Some buttons are hidden or disabled when your account lacks permission. Use the page's own Save and Close buttons; moving to another page does not guarantee unsaved work is retained.

Two different meanings of "client"

In this handbook, a **client record** is a person served by your Center. A **workstation** is a computer connected to the Center Server. Both may be called a "client" in technical conversations; clarify which one is meant when requesting support.

See Read the Dashboard (p. 34), Find and select a client (p. 35), Start a session and find programs (p. 45) and Resolve common access and display problems (p. 90).

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EVERYDAY USER FUNCTIONS

Read the Dashboard

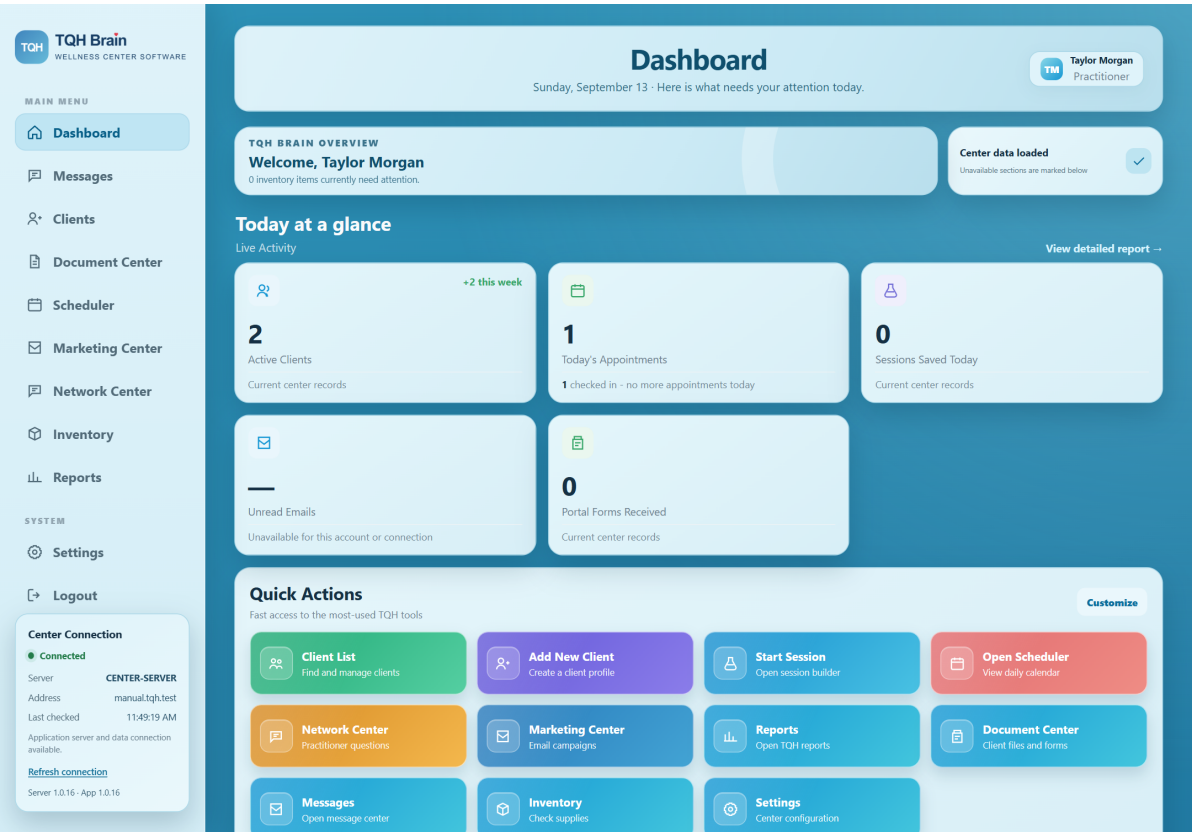

Figure 12. Dashboard with fictional Center data. The left column contains navigation and Center Connection; the main area contains permitted activity and Quick Actions.

- **Today at a glance** summarizes saved Center records. A dash or “Unavailable” is not a zero count.
- **Quick Actions** open frequently used areas. Select **Customize**, choose your actions, then save. Use Reset Default if needed.
- **Today’s Schedule**, room view and calendar depend on Scheduler access. Select the relevant Scheduler link for full details.
- **Priority Queue** contains actionable notifications. Access still follows your permissions.

Center Connection reports the responding Server name, actual address and last check. **Connected** means the app server and data connection were verified; it does not prove every online service is working. **Refresh connection** checks again. Server and App versions appear beneath this card.

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EVERYDAY USER FUNCTIONS

Find and select a client

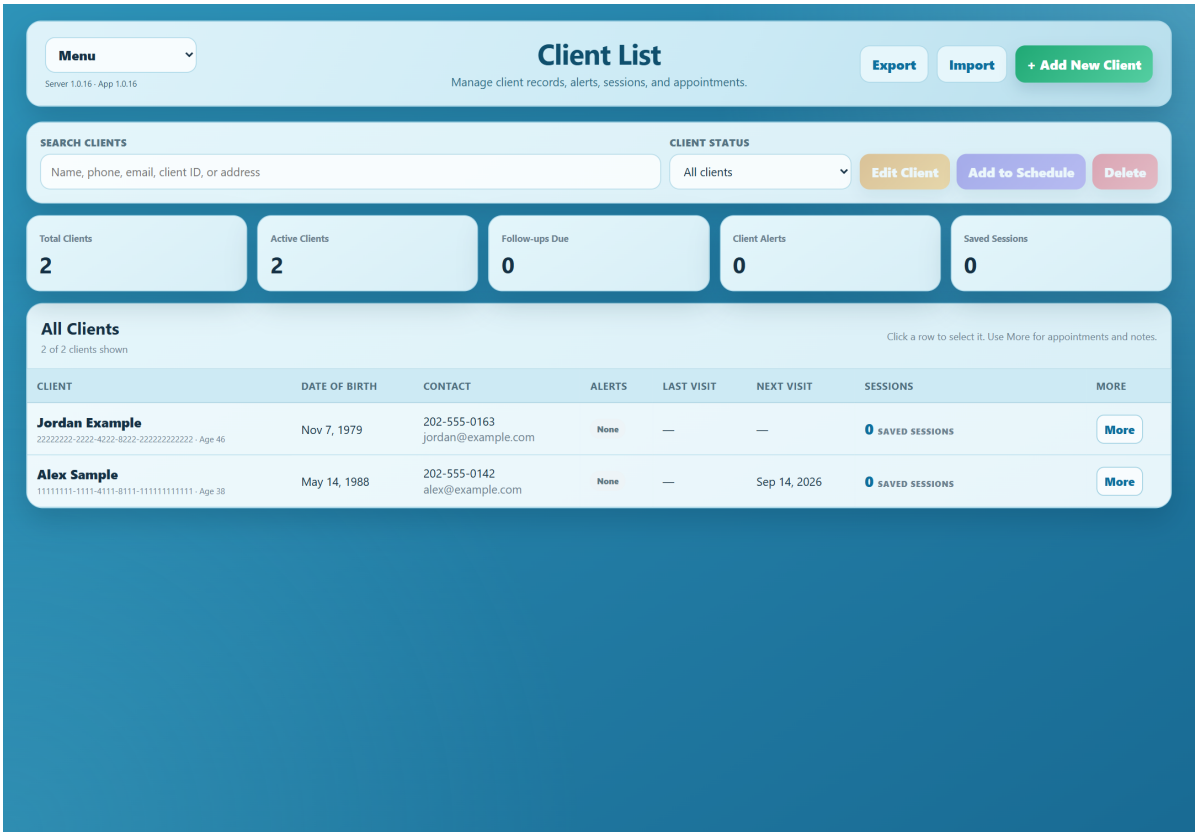

Figure 13. Client List with fictional records. Confirm the selected client before using Edit, Add to Schedule, Delete, or profile links.

1. Open **Client List** and enter the client's name or other available search details.
2. Use **Client Status** to narrow the list. Clear search and filters if an expected record is missing.
3. Select the intended record and verify identifying details using your Center's procedure.
4. Use **Edit Client**, **Add to Schedule**, or the client's profile/document/appointment controls as needed and permitted.

Search does not authorize exporting just the visible records: the encrypted client export includes all non-deleted client profiles in the Center. See Export clients to another TQH Center (p. 38).

Prefer changing the status to Inactive for an ordinary inactive relationship. **Delete** is a separate consequential action; follow retention policy and obtain the required authority before confirming it.

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EVERYDAY USER FUNCTIONS

Add or update client information

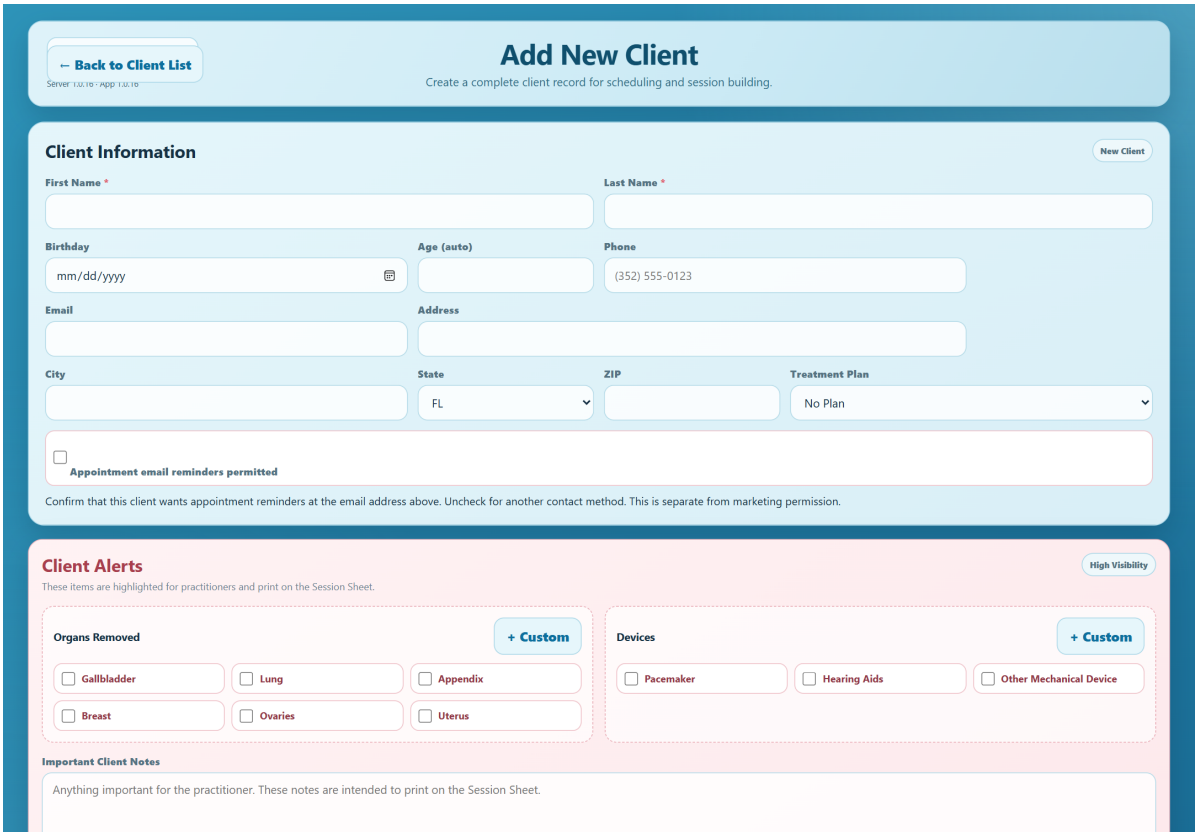

Figure 14. Add/Edit Client form. The screenshot shows layout only; it is not a clinical assessment form or guidance on treatment suitability.

1. Search for an existing record first, then choose **Add New Client**, or select an existing record and choose **Edit Client**.
2. Enter the name, birth date, phone, email and address. Check the automatically calculated age; correct the birth date rather than treating the calculated age as an independent field.
3. Select the client status and treatment-plan status. Record relevant alerts, devices and important notes accurately. Use a Custom option only when appropriate.
4. Review appointment-email permission and marketing preferences where offered. A stored email address alone is not permission to send every type of message.
5. Select **OK (Save)**, **Save Client**, or **Save & Add to Schedule**, as shown. Wait for confirmation and verify the saved record.

Do not put card numbers or credentials in notes. A checked alert is a record flag, not an automated safety clearance.

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EVERYDAY USER FUNCTIONS

Use the Client Profile

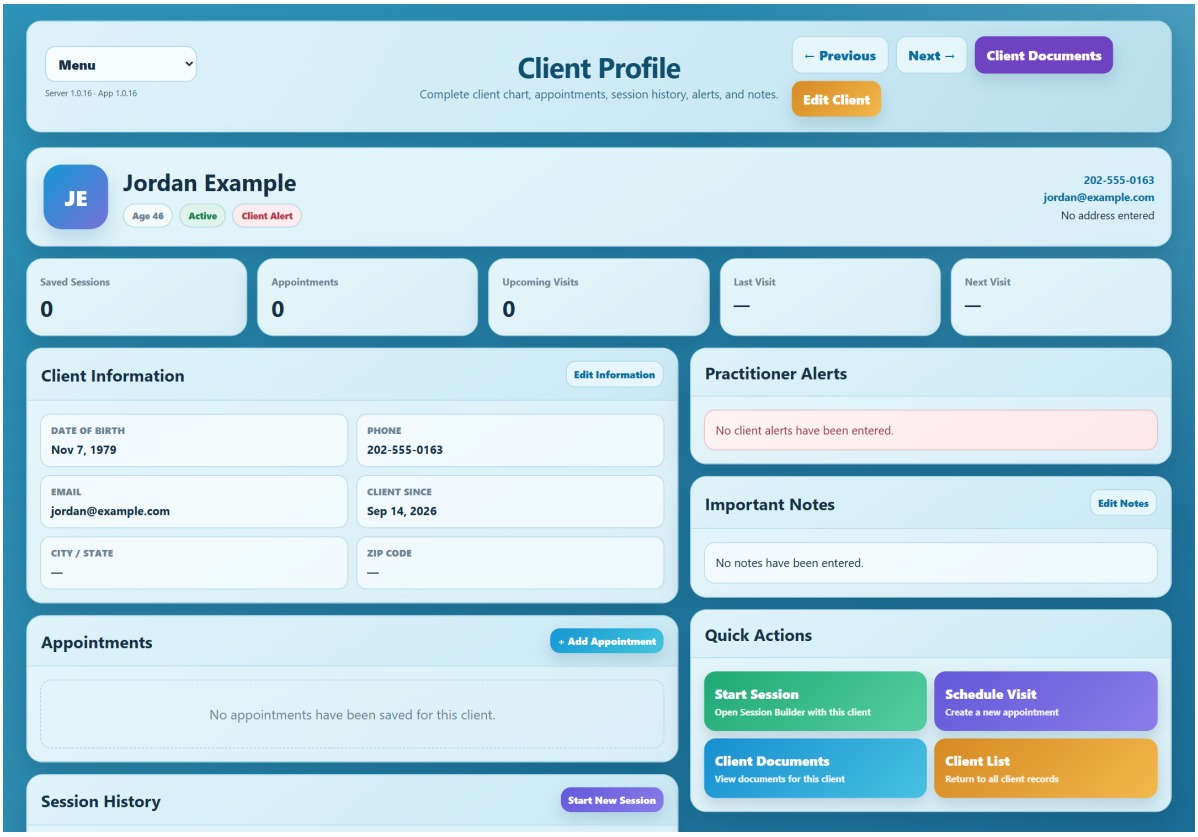

Figure 15. Client Profile with a fictional client. Profile totals, appointments, history and alerts refer to the selected record.

The profile brings together contact information, appointments, Session History, Practitioner Alerts and Important Notes. Use **Previous** and **Next** carefully: they change the selected client.

1. Confirm the name and other identifiers at the top of the page.
2. Review alerts and notes before beginning the visit. Use **Edit Information** or **Edit Notes** only if permitted.
3. Use **Add Appointment** or **Schedule Visit** for a booking, **Start New Session** for Session Builder, and **Client Documents** for files.
4. Open a saved session from history to review or update it. Confirm that you are editing an existing session, rather than unintentionally creating a new one.

Related records can be unavailable because of membership or permissions. An inaccessible appointments/history section does not prove that the client has no appointments or sessions.

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EVERYDAY USER FUNCTIONS

Export clients to another TQH Center

> **Release availability** Client import/export is undergoing completion and release verification. The instructions below describe the existing encrypted-transfer workflow; they do not announce completion of the forthcoming import/export update. Confirm the supported format and approved app version with TQH before transferring records.

Client List > Export creates a password-encrypted `.tqhclients` transfer for import into another TQH Brain installation. It is not a spreadsheet and is not a complete migration or recovery backup.

Included	Not included
All non-deleted client profiles in the Center, including the transferred profile fields and flags	Appointments, sessions, uploaded documents, portal accounts, staff logins and installation credentials

1. Obtain authorization for the transfer and verify the receiving Center and recipient.
2. Open Client List and select **Export**. Read the scope shown in **Export encrypted clients**.
3. Enter a strong transfer password of at least 12 characters, then enter it again in Confirm password.
4. Select **Export encrypted file**. Wait for the downloaded `.tqhclients` file.
5. Send the encrypted file through the Center's approved transfer method. Send the password separately through a different approved channel.
6. Confirm receipt and successful import before removing temporary transport copies according to policy.

> **Important** TQH does not save or recover this password. The receiving installation needs it. Do not rename the file to `.csv` or try to open it in Excel.

The export needs Export Clients and access to the full profile information, including financial fields where protected. Secure transfers require HTTPS on network connections. The current transfer limits are 10,000 clients and a 20 MB import file. Contact support if you exceed the limits; do not split or edit encrypted content manually.

For a full Center recovery, use Configure and verify backups (p. 77) and Validate and restore safely (p. 80) instead.

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EVERYDAY USER FUNCTIONS

Preview and import an encrypted transfer

> **Release availability** Client import/export is undergoing completion and release verification. The instructions below describe the existing encrypted-transfer workflow; they do not announce completion of the forthcoming import/export update. Confirm the supported format and approved app version with TQH before transferring records.

1. Confirm you are signed into the intended receiving Center. Importing into the wrong Center is a confidentiality risk.
2. Open **Client List > Import** and choose the `.tqhclients` file.
3. Enter the password supplied separately by the sender.
4. Select **Preview import**. Review the displayed total, records proposed for import, and possible duplicates to be skipped.
5. Read the preview rows before choosing **Confirm import (skip duplicates)**. Changing the file or password requires a new preview.
6. Wait for the completed result, then search Client List and spot-check the imported records.

Duplicate handling

The import does not overwrite existing clients. Possible duplicates are skipped. Repeating a transfer is designed not to create the same imported records again, but staff must still inspect the result. Do not delete a legitimate existing client merely to force an import to replace it.

If import fails

- Reconfirm the password with the sender without sending it in a support ticket.
- Check that the file is the complete original TQH transfer, not an email preview or renamed file.
- Verify secure connection and Import Clients permission.
- If the preview reports a conflict or changed data, obtain a fresh preview and review it again.
- Preserve the original file while the issue is investigated. An export is not proof that the receiving Center has imported it.

> **After import** Appointments, sessions and documents must not be assumed present. They were not included in this transfer. Check the agreed scope with the sender.

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EVERYDAY USER FUNCTIONS

Navigate the Scheduler

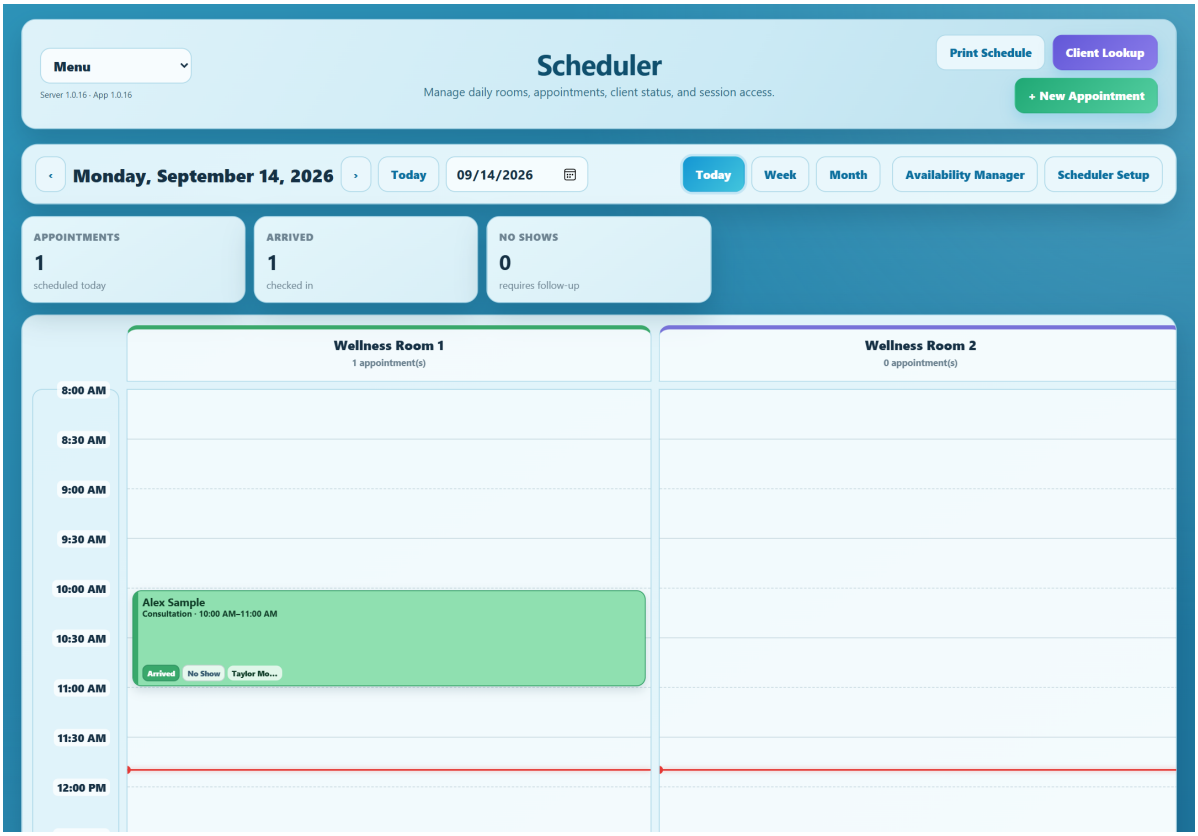

Figure 16. Scheduler with a fictional appointment. View and room availability depend on the Center's saved configuration.

Use **Today**, **Week** and **Month** to change the view. The previous/next arrows move through dates; **Today** returns to the current date. Use **Client Lookup** to find appointments for a specific client and date range.

1. Check the selected date, visible room and Practitioner before creating or moving a visit.
2. Select **New Appointment**, or open an existing appointment to edit it.
3. Use **Print Schedule** for the current schedule after checking filters and print preview. Treat the printed sheet as confidential.
4. For hours, rooms or closures, use **Scheduler Setup** and **Availability Manager** only with Edit Schedules permission.

The Scheduler requires PRO, ELITE or the full trial, plus the appropriate view/edit permissions. Calendar availability and an email reminder are separate: saving a booking does not guarantee the reminder was delivered.

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EVERYDAY USER FUNCTIONS

Create and update an appointment

1. Select **New Appointment**, choose the correct client, and set the appointment date.
2. Choose the service, Practitioner and room. Set the start time and duration; verify the displayed end time.
3. If applicable, choose the client package. Use the existing package where possible rather than repeatedly creating a new package for each visit.
4. Leave attendance **Not marked** until appropriate, or choose **Arrived** or **No Show** for an actual outcome.
5. Record payment status only when authorized and known: Not recorded, Paid in full, Partial payment or Not paid. Enter the method, amount and note as appropriate.
6. Review appointment notes, then select **Save Appointment**. Resolve any time, room, validation or permission warning before assuming the booking exists.
7. Reopen the appointment to verify its final details. Use **Open Client Profile** or **Open Session Builder** to continue the visit.

Changes and deletions

Open the appointment, make the correction and save. Recheck its date, room and time after a reschedule. Deleting an appointment is not the same as marking No Show; use the correct action and follow Center record-retention policy.

> **Recording is not charging** Payment fields record what the Center received. They do not themselves process a payment card. Do not enter full card details in Payment Note or Appointment Notes.

For reminder eligibility and timing, see Enable 24-hour appointment emails (p. 76). For linked sessions and packages, see Link appointments, sessions and packages (p. 42).

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EVERYDAY USER FUNCTIONS

Link appointments, sessions and packages

A client package groups related visits. A package label, package total, paid amount and completed-session count are different facts; review all relevant records before correcting one.

1. In the appointment, choose an existing **Client Package** when the visit belongs to it.
2. If creating a new package is appropriate, enter the custom package name and total sessions. Verify the indicated session number rather than guessing from the number of appointments displayed.
3. Open Session Builder from the appointment or the client profile. Confirm the client and package link shown before saving.
4. When revisiting a saved session, use its linked-appointment controls where available to find or schedule the related booking.
5. After changes, inspect the Client Profile/package information and the linked appointment to verify the result.

Avoid double-counting

- A scheduled visit is not necessarily a completed saved session.
- A session can be linked to an appointment; creating a second session to correct the first can inflate history.
- Follow the app’s package-link controls rather than editing labels alone to imply a relationship.
- If two records appear to represent the same visit, ask an authorized user to review their links before deleting either record.

Financial values may be hidden even when package/session information is available. The **View financial information** permission overrides that restriction only for an authorized working account; it does not grant unrelated modules or export rights. See Financial visibility and working seats (p. 72).

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EVERYDAY USER FUNCTIONS

Rooms, hours and availability

Configure the schedule

Open **Scheduler > Scheduler Setup**. Review the day's start/end hours, Practitioner names, service colors and rooms. Add or edit the intended entry, then select **Save Rooms**. Verify the visible schedule afterward.

Display names in Scheduler setup describe scheduling resources. Adding a Practitioner name there is not the same as creating an app login in Users & Permissions.

Block unavailable time

1. Open **Availability Manager**.
2. For a full closure, choose the date, enter a reason and select **Close Entire Day**.
3. For a partial closure, enter the date, reason and start/end times, then use the block-hours action shown.
4. For a room-specific closure, select the date and time range, choose the rooms and select **Block Selected Rooms**.
5. Close the manager and check the affected date and rooms. Review existing appointments separately; do not assume a closure has contacted or rescheduled clients for you.

Practical checks

- Use meaningful room names and consistent Practitioner spelling.
- Verify time ranges before saving; noon and midnight are easy to confuse.
- Use **Reset Defaults** only when you intend to replace the current schedule configuration. Review before saving.
- Confirm availability before booking. A conflict or save error means you need to review the booking; do not just refresh and assume it succeeded.

> **Time zones** Appointment email reminders have an explicit Center time-zone setting under Notifications. Verify it independently after setup or a time-zone change. See Enable 24-hour appointment emails (p. 76).

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EVERYDAY USER FUNCTIONS

Session Builder at a glance

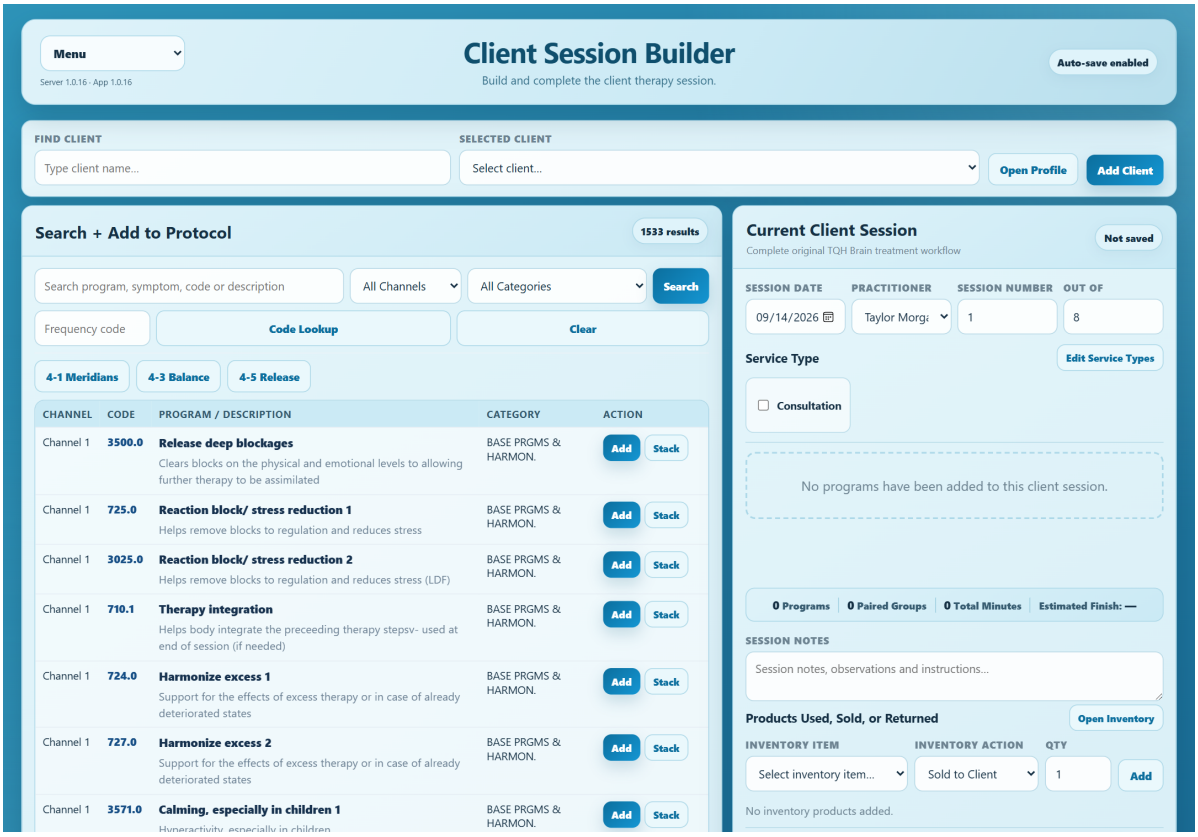

Figure 17. Session Builder uses the server's program catalog. This example screen is shown before adding protocols to a client session.

The program search and channel/category controls find catalog entries. The session area holds the selected protocol sequence, durations and notes. Select the intended client before saving or linking a package.

Use the app's current program details and client alerts; the catalog and this handbook are software references, not a substitute for professional judgment or equipment instructions. Do not infer treatment suitability from the presence of a program in the list.

Follow Start a session and find programs (p. 45), Pair, stack and arrange protocols (p. 46) and Save, revisit and print a session (p. 47) for the complete workflow. A draft, selected program or printout is not automatically a saved entry in the client's chart.

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EVERYDAY USER FUNCTIONS

Start a session and find programs

Session Builder records the selected client's session. The program library is a software reference; selecting a program is not a clinical recommendation or safety clearance.

1. Open **Session Builder** from the client profile or appointment when possible. Otherwise use **Find Client** or the Selected Client list.
2. Verify the client, date, Practitioner, session number, package link and service type.
3. Review alerts and notes. Set **Default Minutes** for items you will add; each protocol item can have its own duration.
4. In **Search + Add to Protocol**, enter a keyword or code. Choose a Channel and Category, then select **Search** or **Code Lookup** as appropriate.
5. Read the returned code, title, description and category before selecting **Add** or **Stack**.
6. Use **Clear** in the search area to broaden the search if you cannot find an item. This is different from **Clear Session**.

Program types

Channel 1 items require a Channel 2 pairing. **Channel 2** can also be added as a single item. The **4-1 Meridians**, **4-3 Balance** and **4-5 Release** quick lists start a pair that you complete with Channel 2.

Program and category data load from the Center database. If the catalog is unavailable or reported incomplete, stop and ask the administrator to investigate. Do not replace missing data with guessed codes or assume the visible subset is complete.

Continue with Pair, stack and arrange protocols (p. 46) and Save, revisit and print a session (p. 47).

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EVERYDAY USER FUNCTIONS

Pair, stack and arrange protocols

Pair one Channel 1 item

1. Find the desired Channel 1 program and select **Add**.
2. The app locks the pending first item and switches to Channel 2. Read the pairing message above the results.
3. Choose one Channel 2 program and select **Add** to complete the pair.
4. Confirm both components in the Paired Protocol card. Use Cancel if you need to abandon the pending pair before it is added.

Pair a stack

1. Select **Stack** on each intended Channel 1 program. Review the selected count; select a stacked item again to remove it from the selection.
2. Select **Pair Stack**. Choose one Channel 2 program, then select **Add**.
3. Inspect every Channel 1 item and the shared Channel 2 item in the resulting Stacked Channel 1 Protocol card.

Arrange and document

- Use the up/down arrows to change item order.
- Type **Program Time** or use plus/minus to adjust minutes. Changing the default does not substitute for checking existing item times.
- Enter item-specific Therapy Notes where needed and use **Done** to record completion.
- Remove an item with its remove button and confirm the intended deletion from the current session.
- Check program count, pair count, total minutes and estimated finish time. The estimate is calculated, not proof of treatment delivery or a hardware timer.

> **Before saving** Finish or cancel pending pair selection and verify the protocol actually appears in Current Client Session. Highlighting a search result alone does not add it.

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EVERYDAY USER FUNCTIONS

Save, revisit and print a session

Save the chart entry

1. Confirm the selected client and package link, session date, Practitioner and service type.
2. Verify the full protocol, item durations, Done selections and notes. Add products only if Inventory is available and you are authorized.
3. Select **Save Session to Client Chart**. At least one protocol and a selected client are required.
4. Wait for the saved confirmation. Review Session History in the Client Profile to verify the entry.
5. To correct the same session, open it from history and save the update. Do not create another entry merely because you are uncertain whether the first save completed.

Draft, saved entry and printout

Save Draft preserves work in progress; it does not replace saving the client chart entry. The app also queues draft updates, but an interrupted connection can prevent them being retained. Use Save Draft deliberately before leaving work unfinished.

Print / Save as PDF opens the print layout. Choose a printer or the browser's PDF destination, check the client and pages, and save to an approved location. Printing does not itself save a session to the chart.

Clear Session clears the current working session and its draft after confirmation. Save first if the work must be retained.

Products in a session

Choose Inventory Item, Sold to Client / Used During Session / Client Return and quantity, then **Add**. On a new session save, inventory changes are applied separately. If you see "Session saved, but inventory was not updated," the chart entry exists: investigate stock and movement history instead of saving a duplicate session. Editing an existing session does not automatically repeat the original stock movement.

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EVERYDAY USER FUNCTIONS

Upload and retrieve client documents

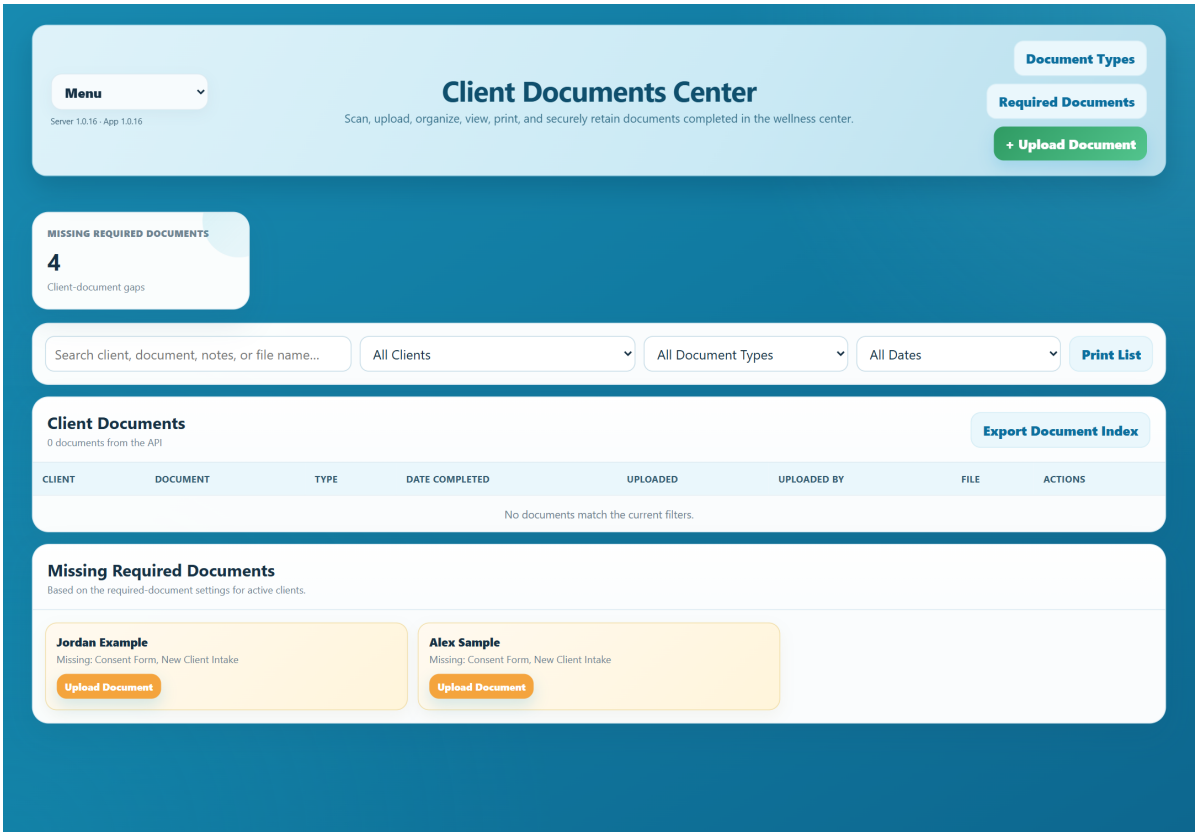

Figure 18. Client Documents Center. Filter by client and document type before viewing, printing, downloading or deleting information.

1. Open **Client Documents** from the selected profile, or filter the Document Center to the correct client.
2. Select **Upload Document**. Choose the client, document type, document name and completion date; review notes and the selected file.
3. Select the intended file and verify that it belongs to this client, then choose **Save Document**.
4. Refresh or inspect the list for the stored entry. Use its View or Download action as permitted.

Documents are encrypted in managed server storage. A downloaded document or printed page must still be protected outside the app. Do not assume a downloaded PDF or an exported index is password-protected.

Deleting a document is separate from closing a preview. Obtain the required authorization and follow retention policy before confirming Delete.

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EVERYDAY USER FUNCTIONS

Document types and required forms

Users with **Manage Document Types & Requirements** permission can maintain the choices used by the Document Center. This is a working-module permission, not automatic access for an administration-only login.

1. Open **Client Documents Center > Document Types**.
2. Add a meaningful document type, or carefully edit/remove a listed choice. Save the document types.
3. Open **Required Documents**, select the types your Center requires and save the requirements.
4. Review **Missing Required Documents** and follow up with the client using an appropriate workflow.

The missing-documents view checks stored document types. It is not a review of clinical completeness, signature validity or the correctness of a file. Verify the content yourself.

Print and export the index

Print List prepares the visible document listing using the selected filters. Check print preview before producing it.

Export Document Index downloads a CSV of document metadata, not a bundle of the documents. Do not assume the CSV export is limited to the current on-screen filters; inspect its scope before sharing.

> **Confidentiality** The document index can identify clients. It is not the encrypted `.tqhclients` transfer format and does not automatically have an Excel password. Use approved secure storage and transport, or do not export it.

See Send a secure client form (p. 50) for collecting a new form and Review returned forms and manage links (p. 51) for accepting returned material into Client Documents.

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EVERYDAY USER FUNCTIONS

Send a secure client form

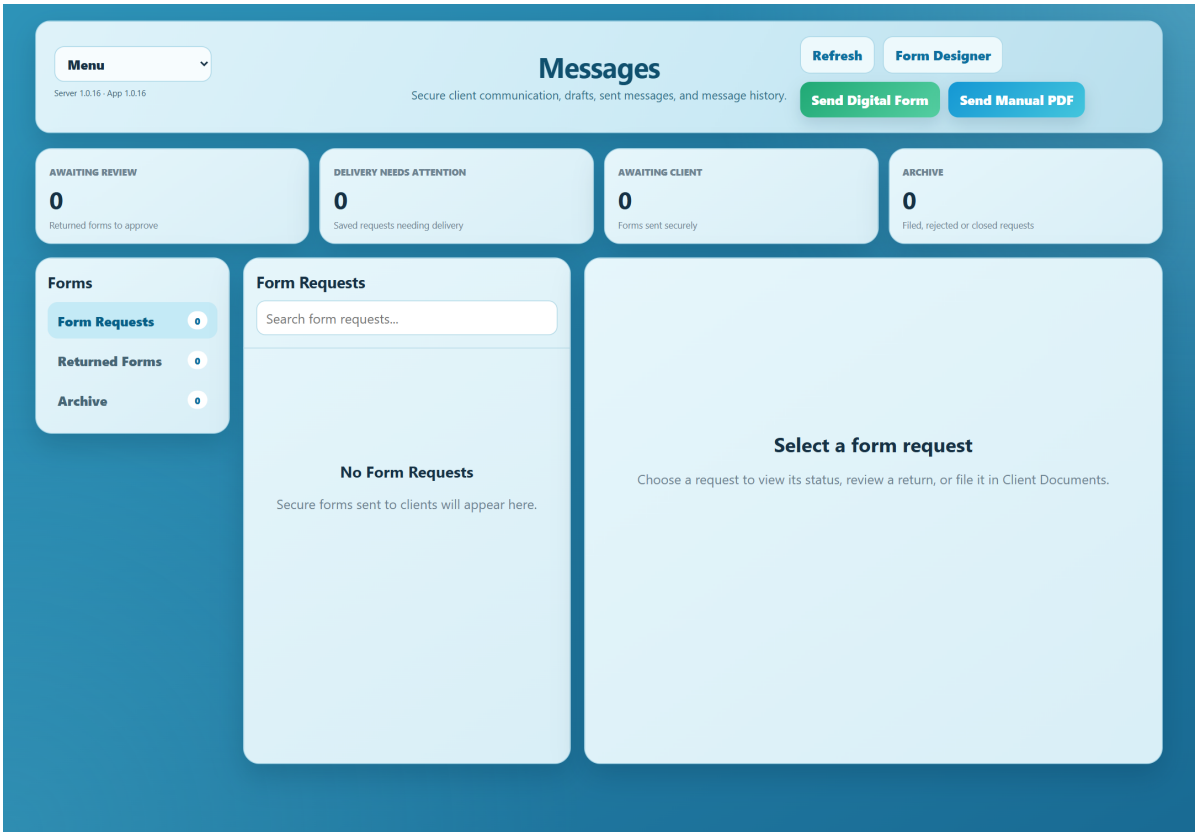

Figure 19. Messages is the client-form workspace, with Form Requests, Returned Forms and Archive. It is not a general replacement for your email mailbox.

1. Open **Messages > Send Digital Form** for a published template, or **Send Manual PDF** for a blank/scanned PDF.
2. Search for and select the correct client. Verify Recipient Email and Document Type.
3. Choose a published form, or upload the intended PDF of up to 4 MB. Do not accidentally upload a completed form belonging to someone else.
4. Choose link expiry (1, 3, 7, 14 or 30 days), review the request and select **Send Secure Form**.
5. Open **Form Requests** to check the resulting status. A created request is not proof of delivery or completion.

The client follows the secure link and its verification instructions. If they cannot use it, recheck the email and expiry before issuing another link. See Review returned forms and manage links (p. 51).

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EVERYDAY USER FUNCTIONS

Review returned forms and manage links

Manage a sent request

Open **Messages > Form Requests**, select the request and read the recipient, form version, status and any failure reason. A request marked Delivery Failed needs attention; it is not a completed form.

Use **Send Again** or **Replace Link & Send Again** when appropriate. Confirming a fresh link replaces the earlier link for the same request. Tell the client to use the newest message.

Use **Revoke** only when you intend the link to stop working. It is not a way to approve or file returned content.

Review and file a return

1. Open **Returned Forms** and select the submitted request.
2. Inspect the returned information/PDF and confirm the client, document type and content. Resolve discrepancies before filing.
3. If correct and you have the acceptance permission, select the accept/import action shown. The accepted return is filed in Client Documents.
4. If the return should not be accepted, use Reject and follow the Center’s correction process.
5. Verify the document in the Client Documents Center, not just the archived message status.

Archive and permissions

Archive includes terminal requests such as imported, rejected, revoked or expired items. Review Returned Forms permits review; **Accept Forms into Client Documents** is a separate permission. A user may be able to review but not file the return.

If downloading a returned PDF, treat it as confidential. Do not resend an uncertain delivery repeatedly or accept a return merely to clear a notification.

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EVERYDAY USER FUNCTIONS

Create and publish a form template

Form Designer is available to working users with **Manage Document Form Templates** permission. A form design is different from a form request sent to a particular client.

1. Open **Messages > Form Designer**. Start with **New Form**, a template, or Duplicate an existing form.
2. Enter an identifiable form name, category and description. Organize the form's sections before adding fields.
3. Add the controls needed for the form: text, long text, number, date, email, phone, dropdown, radio buttons, checkbox/group, signature, heading or paragraph.
4. Select a control and review its label, required setting, choices and other properties offered. Keep field labels clear; make only genuinely needed questions mandatory.
5. Arrange sections and controls in the intended reading order. Save your work.
6. Select **Preview** and inspect the complete form, including long questions and choice lists. Use the available test/run view only with fictional data during design.
7. Select **Publish** when ready for use. Return to Messages and confirm the published form appears in the Digital Form list.

Template maintenance

Duplicate a form when creating a variation so you do not unintentionally alter the original. Review the version recorded on sent requests. Do not assume editing a template changes a request already issued to a client.

Before deleting a form, confirm that it is no longer needed and that the action fits your Center's retention procedure. Deleting a template is not a substitute for revoking an outstanding request or removing a stored client document.

> **Collect only what you need** Review wording, consent and signature requirements under Center policy. Publishing a form does not itself establish that its legal wording or clinical content is appropriate.

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EVERYDAY USER FUNCTIONS

View reports and interpret totals

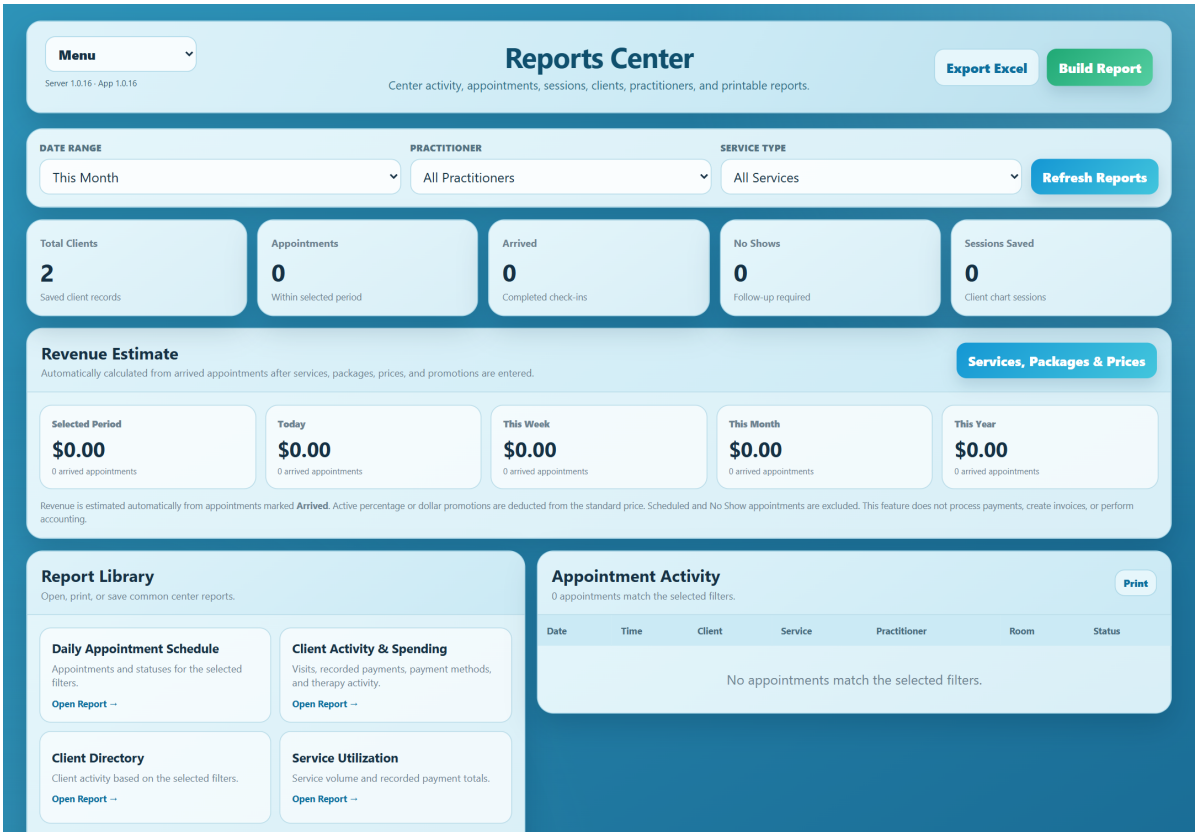

Figure 20. Reports Center. Choose filters first, then refresh. Missing access must not be interpreted as zero activity.

1. Choose Date Range, Practitioner and Service Type, then **Refresh Reports**.
2. Select a report from the available library or use **Build Report**. Read its title and filters before interpreting the result.
3. Use **Print** or **Print / Save PDF** for the selected report and inspect the print layout.
4. For Excel, use **Export Excel** and choose the required dataset. See Export a report to Excel (p. 54).

Revenue Estimate derives from configured services/packages and prices; it is not proof of received payment. **Recorded payments** reflect amounts entered in saved records, not necessarily payment-processor settlements. Reconcile against the Center's actual financial records.

Services, Packages & Prices can be maintained with the required scheduling-edit permission. Review base prices and any percentage/dollar promotion before saving. This Center pricing is separate from TQH membership and bulletin advertising charges.

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EVERYDAY USER FUNCTIONS

Export a report to Excel

Open **Reports Center > Export Excel** after setting the date, Practitioner and service filters. The export reads the latest saved records for those filters.

Report choice	Password behavior
Monthly recorded payments	No password only for the broad monthly-total summary without narrowed Practitioner/service filters.
Appointment schedule	Password-to-open required.
No-show follow-up	Password-to-open required.
Service utilization	Password-to-open required.
Client activity and recorded payments	Password-to-open required.

1. Select the report and read the sensitivity message.
2. When prompted, enter and confirm a password of at least 12 characters. Keep it separately; TQH cannot recover it.
3. Select **Export Excel** and wait for the `.xlsx` download.
4. If Excel does not open automatically, open the file from your browser’s Downloads list. Enter the password if requested.
5. Check report title, date range, filters, totals and rows before using or sharing the workbook. Store it in the Center’s approved location.

Export Reports is separate from report-view permission. Protected client-level reports can also require View Clients; financial reports can require financial visibility. A 403 denial should be investigated, not bypassed by switching to an administrator-only account.

> **Transport** Encryption protects a file while locked. Once opened, copied, printed or saved without protection, the resulting material needs separate safeguards. Use HTTPS for protected network exports.

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EVERYDAY USER FUNCTIONS

Find and maintain inventory items

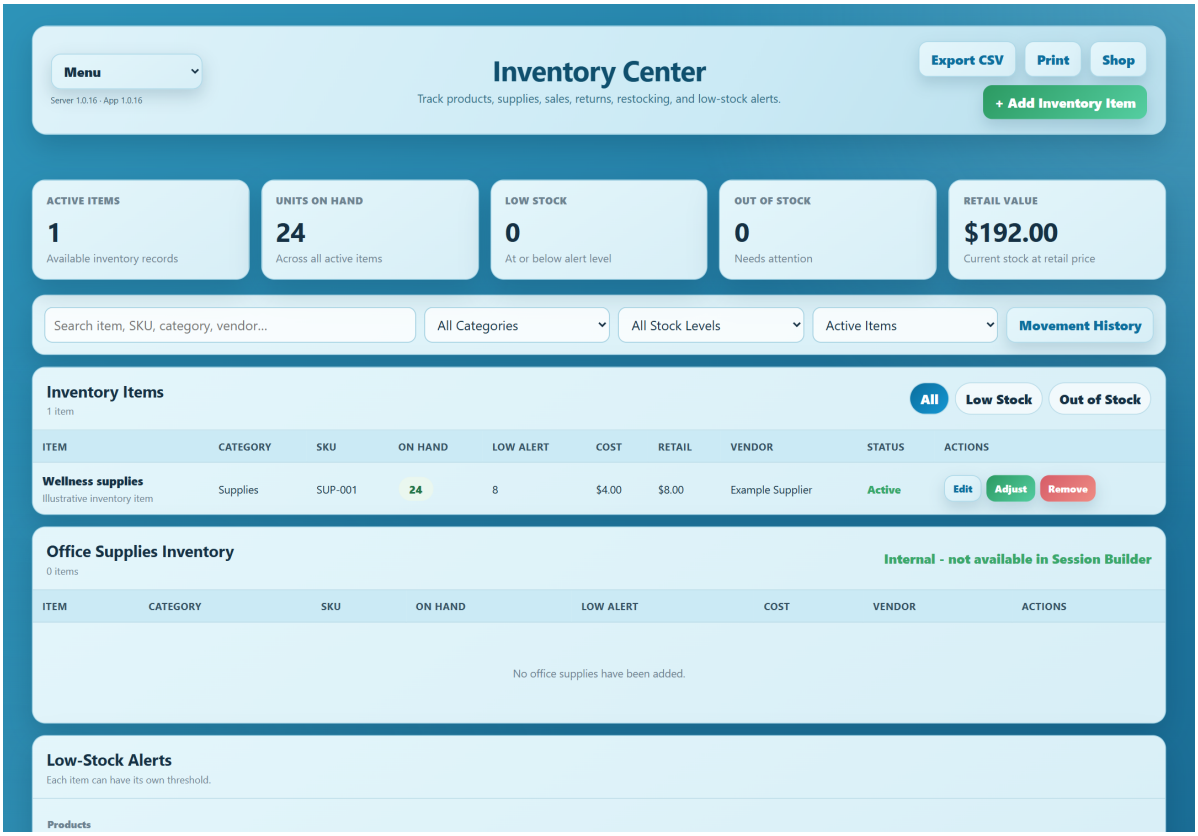

Figure 21. Inventory Center with a fictional supply item. View, add, edit, adjust, delete and export are separate permissions.

1. Search and filter by category, stock level and active/inactive status. Inspect Low-Stock Alerts as well as the main list.
2. Select **Add Inventory Item** to create an item. Enter name, category, SKU, starting quantity, low-stock threshold and applicable vendor/cost/retail information.
3. Save, then verify the item and its starting balance. Use Edit for descriptive corrections; use an inventory adjustment for a stock movement.
4. Prefer Inactive when an item should no longer be offered. Use Delete only when authorized and appropriate for record history.

Export CSV downloads inventory data for spreadsheet use. It is not a client transfer or complete backup. Hidden financial information is omitted according to permissions. Inspect **Print** preview before printing stock records.

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EVERYDAY USER FUNCTIONS

Adjust stock and review movements

1. Select the intended inventory item and open its **Adjust** action.
2. Choose the correct movement: Restock / Received, Sold, Client Return, Used During Session, Damaged / Discarded, Manual Increase or Manual Decrease.
3. Enter the quantity and a clear factual note. Verify the direction before saving; a return and a sale have opposite effects.
4. Select **Save Adjustment**. Check the new balance and the movement history.
5. If the save is uncertain, inspect **Movement History** before trying again so a duplicate adjustment does not occur.

Correcting a discrepancy

Compare the physical stock, the item's history and any product entries in saved sessions. An item used/sold/returned in a newly saved session can generate a stock movement. Do not record the same movement manually and through Session Builder unless both are genuinely separate events.

For a documented correction, use the appropriate manual adjustment with a meaningful note and the required permission. Do not overwrite the item name or starting quantity to conceal why stock changed.

Low-stock alerts

An item at or below the configured threshold can appear in low-stock lists and the Dashboard Priority Queue. The alert is not a purchase order; staff must arrange replenishment through the Center's normal procedure.

> **Session warning** If a session saved but inventory did not update, the session remains saved. Review the error and history before correcting stock. See Save, revisit and print a session (p. 47).

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EVERYDAY USER FUNCTIONS

Prepare a marketing campaign

Marketing Center requires ELITE and Email Promotions permission. It manages promotional campaigns; it is not the appointment-reminder service.

1. Open **Marketing Center > Sender Settings** or **Email Settings**. Review Center branding name, contact phone, postal address and reply-to email.
2. Send the reply-address verification code and enter it using **Verify reply address** before sending campaigns.
3. Select **New Email Campaign**. Enter an internal Campaign Name, Template and Email Subject.
4. Choose the audience, then review the recipients rather than relying only on its name.
5. Write the preheader and message. The current message supports the first-name and Center-name merge fields shown in the editor. Review the preview to ensure they read correctly.
6. If using a button, enter clear Button Text and the correct complete link. Avoid including sensitive client details in a URL.
7. Choose **Save Draft** for unfinished work, **Send Now**, or **Schedule** with a future date/time.
8. Confirm the audience is permitted to receive promotional email, preview the message, then select **Save / Queue Campaign**.

> **Sender and replies** The managed marketing sender is marketing@tqhbrain.com. Your verified reply-to address directs replies. Do not change mailbox credentials inside a campaign or assume this sender is the no-reply appointment mailbox.

Only send to an appropriate, authorized audience. A valid email address alone does not establish permission to send promotional messages.

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EVERYDAY USER FUNCTIONS

Audiences, templates and campaign status

Choose the audience

Quick Audiences include all email clients, active/follow-up/inactive clients, birthdays this month and incomplete packages. **Choose Specific Clients** opens a searchable selection list. **Audience Builder** combines available client-status, visit-history, birthday and package filters; use **Use This Audience** to carry the result into a campaign.

Review recipient names/counts, email eligibility and opt-out handling before queuing. Do not use sensitive information to create an inappropriate promotional audience.

Templates

Use a provided template, **Custom Template**, or **Upload Template**. Review name, category, subject, body and button text before saving. Uploaded HTML/TXT content must still be reviewed in the actual campaign preview; do not assume every imported layout will be preserved.

Duplicate a selected campaign to prepare a new draft. Review its copied content and audience before sending; duplication is not a safe method of resolving an uncertain send.

Interpret status

Status	What to do
Draft	Review and complete it before queuing.
Queued / Scheduled	Check the intended delivery time. Do not queue a duplicate.
Processed	Review accepted, suppressed/unsubscribed and failed counts. Accepted by the provider is not proof of inbox delivery.
Needs attention	Read the displayed error and investigate.
Submission pending	Use Retry Submission on the same campaign when appropriate; avoid creating another copy.
Cancelled	Confirm no further action is intended; review actual send results separately.

The Automated Emails area must not be assumed to run a configured workflow merely because its heading exists. Automatic appointment reminders are configured separately under Notifications; see Enable 24-hour appointment emails (p. 76).

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EVERYDAY USER FUNCTIONS

Use the Practitioner Network

The Network connects authorized working Practitioners from participating Wellness Centers. It needs an active Center connection, applicable membership, Network permissions and the required privacy/HIPAA acknowledgement.

Navigate the workspace

- **Community Feed** shows permitted current discussion. Use search and Categories to narrow it.
- **My Questions**, **Needs Replies** and **Saved Posts** provide task-focused views.
- **Case Library** and **Protocol Library** group the applicable discussion types; review content critically.
- **Notifications**, private practitioner messages, and the **Wellness Referral Network** are separate parts of this workspace.
- **Zoom** opens Zoom sign-in in a new browser tab. It does not create or host a meeting inside TQH Brain. For an advertised meeting, use the participant link on its bulletin ad; see Advertise a scheduled Zoom meeting (p. 66).
- **Practitioners Online** reflects recent presence, not a guarantee that someone is currently reading a message.

When the Network is unavailable

Check your internet connection, Center membership and the displayed error, then refresh. The Center Server can be Connected while an online Network dependency is unavailable. Report the exact message to your administrator. Do not enter data repeatedly or treat a connection failure as permission to use an insecure alternative.

> **No client-identifying information** Do not post names, dates of birth, record numbers, contact details, documents, photographs or combinations of details that identify a client. This applies to posts, replies, private practitioner messages, referrals and ads. Removing a name alone may not de-identify a case.

Network content is professional discussion, not a verified treatment recommendation or endorsement. Follow your professional responsibilities and Center policy when using it.

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EVERYDAY USER FUNCTIONS

Post, reply, save and report

1. Use the quick-post area to ask a question. The header's Zoom shortcut does not replace the discussion composer.
2. Choose a category and post type: Question, Therapy Discussion or Protocol Share.
3. Enter a clear subject and de-identified details. Review any protocol/file-name text as carefully as the main message.
4. Confirm the content is appropriate and select **Post Question** or **Post to Network**, as shown.
5. Check that the post appears once. If a submission result is uncertain, refresh My Questions before resubmitting.

Work with discussion

Open a post to read the full content and replies. Use Reply when you have permission. Add factual, de-identified content; private details do not belong in replies either.

Helpful provides feedback. **Save** adds the post to Saved Posts; it is not a download or an offline copy. A shared/copy link does not give an unauthorized person access to the Network.

Use **Report** to request moderation of inappropriate content. Give a clear reason without repeating unnecessary identifying details. Reporting is not an emergency notification or a guarantee of immediate removal.

Center-scoped moderation

Some working Practitioners may have permission to moderate their own Center’s Network activity. That permission does not authorize approving paid advertisements or administering other Centers. Ad submissions are reviewed by TQH; customer users cannot approve their own publication.

> **Content guard** Automated checks do not replace your review. If the app rejects text, correct the content; do not disguise identifiers to get around the check.

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EVERYDAY USER FUNCTIONS

Share and read protocol PDFs

Open **Network Center > Protocol Library**. The total counts active library posts; use the library paging controls to reach older entries. Text protocols can be read in the list, with Replies opening the conversation.

Share a PDF

1. Select **Share PDF protocol**. Publishing permission and an active Network connection are required.
2. Enter a title and description, and choose a PDF no larger than **4 MB**.
3. Confirm that you have permission to share it and that the file and description contain no client-identifying information.
4. Submit once and wait for the result. If an error appears, your input stays available to correct and retry.

Read an attachment

Use **View PDF** to open the file in a browser tab or **Download PDF** to save a copy. Both require current Network viewing access. Files are stored privately and encrypted; knowing a post ID does not grant access.

The upload policy performs basic PDF checks and refuses recognized script, embedded-file and password-protection markers. It is not a malware scan or a guarantee that a file is safe. Follow your Center's ordinary document-handling policy.

Report and moderate

Use **Report** on a post or reply to request review. Authorized moderators can hide content and find it under Hidden Posts or Hidden Replies. Hiding a PDF post blocks further access through the app; restoring it makes it available again. Deleting its post removes the stored PDF. Copies already downloaded are unaffected.

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EVERYDAY USER FUNCTIONS

Practitioner messages and referrals

Send a practitioner message

Open **Messages** in Network Center, choose New Private Message and the intended Practitioner, then enter a de-identified message. Confirm the no-client-identifying-information acknowledgement and send. In a conversation, check the recipient again before replying.

Network messages are distinct from Messages used to send client forms. A private Network message is not an approved channel for identifiable client records.

Find a Center and send a referral

1. Open **Wellness Referral Network > Find a Wellness Center**.
2. Search by the available location/service filters and open the Center Profile. Review its published information and contact details.
3. Select **Send Referral** and verify the receiving Center.
4. Enter only the general origin region, services requested, reason and de-identified notes appropriate to the handoff.
5. Confirm that the client authorized the referral and that it contains no client-identifying information.
6. Select **Send Referral**, or **Save Draft** if unfinished. Verify the resulting record in My Referral History.
7. Review received referrals in **Referral Inbox**. Open details and use **Update Status** as appropriate. Print only when authorized, using the secure handling rules in Printing, downloads and file protection (p. 89).

Coordinate any identifiable records separately through approved Center processes. A referral entry does not itself transfer the client’s chart or book an appointment at another Center. Directory participation and “accepting new clients” are published Center information, not a guarantee of availability.

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EVERYDAY USER FUNCTIONS

Purchase a bulletin advertisement

Live payment integration is still pending. The purchase instructions in this chapter apply only when the service is enabled; sandbox purchases are tests and do not collect real payments.

The Community Bulletin Board is separate from Network discussion. Customer purchases require an active paid membership and the explicit **Purchase network advertising** permission. A trial alone does not authorize buying an ad.

1. Select **Advertise here**. Enter the advertiser/Center, category, headline, announcement and public business contact details.
2. Optionally upload a JPG, PNG or WebP flyer up to 5 MB and enter an image description. Review the complete image, not just the thumbnail.
3. Choose **Start after approval** (1-365 whole 24-hour days) or **Choose start and stop dates** (calendar-day pricing). The current rate is $5 USD per day. See Choose advertising dates (p. 64) before selecting dates; valid advertising-only promotions are verified in the quote.
4. Review the advertising terms and confirm your rights to the text/image and absence of private or prohibited content.
5. Select **Prepare final preview**. Inspect the flyer, wording, contact details, schedule, days, final total, discount, meeting cutoff if present, and quote expiry.
6. Check the exact-preview and duration/payment confirmations, then continue to Stripe.
7. Choose or change the card in Stripe checkout and complete the intended payment. Changing this advertising card does not change the subscription payment method.
8. Return to **My ads** and refresh payment status. Do not assume that returning from checkout proves successful payment.

> **Approval and duration** Payment does not guarantee approval. Ordinary duration ads begin their purchased run at approval. Calendar ads keep their fixed stop date; late approval shortens the run without changing the price. A scheduled Zoom meeting can end publication earlier. Read the exact preview before paying.

If checkout says **sandbox/test**, it is not live billing. Follow TQH's test instructions and do not use it as evidence of a production charge.

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EVERYDAY USER FUNCTIONS

Choose advertising dates

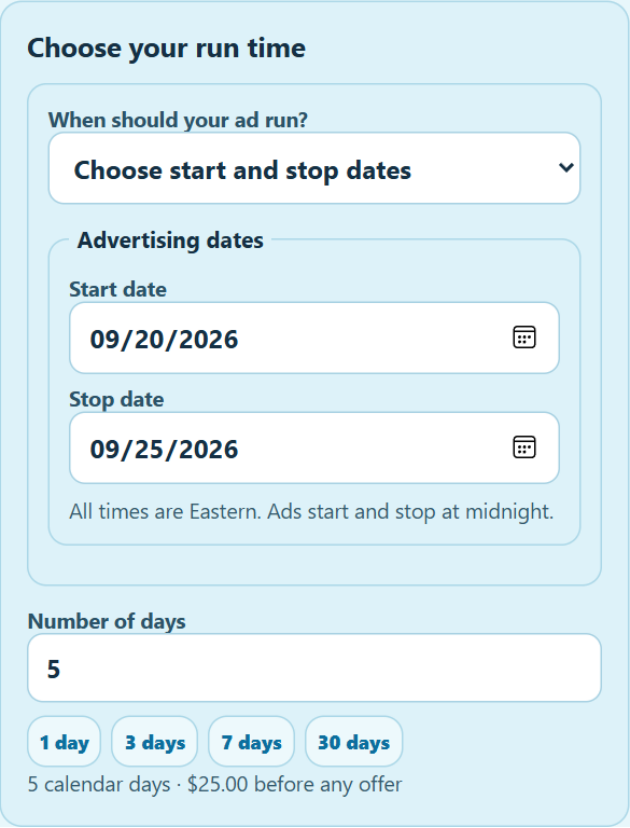

Figure 22. The calendar controls calculate chargeable days. The selected stop date is excluded. Example: September 20 to 25 is five days, not six.

1. Under **When should your ad run?**, choose **Choose start and stop dates**.
2. Select a start date from today through one year ahead, then a later stop date. The range must contain 1-365 calendar days. The 1, 3, 7 and 30-day buttons help choose an interval.
3. Check the calculated days and estimate. Day count is read-only in this mode. September 20 to September 25 costs **5 days x $5 = $25** before any offer and stops at midnight at the beginning of September 25.
4. Review the final preview, not just the estimate, before confirming payment.

All new bulletin schedules use **Eastern Time (America/New_York)**. Calendar boundaries are midnight. A daylight-saving date may be 23 or 25 hours but still counts as one priced calendar day. This does not change the Center's appointment, reminder or backup settings.

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EVERYDAY USER FUNCTIONS

Understand approval and end times

Run type	What happens after TQH approval
Start after approval	An ordinary ad runs for the purchased number of 24-hour days from approval. A scheduled Zoom meeting still caps the end if it finishes earlier.
Calendar dates, approved early	The ad waits as Scheduled until the chosen start date. It does not appear in the public rotation early.
Calendar dates, approved late	Publication starts at approval but the original stop date and price remain fixed. Waiting for review can reduce available display time.
Meeting or calendar cutoff passed	The ad cannot be approved after its effective end. A completed payment does not extend the selected dates.

Ads share rotation; there is no automatic renewal or guarantee of exclusive placement or impressions. Read the current final-payment terms, including unused-time, rejection and takedown conditions, before paying.

For a paid checkout with a fixed cutoff, allow at least 30 minutes plus a short processing margin before that cutoff. If checkout cannot be opened because too little time remains, choose a later valid end and prepare a new preview.

Changing content or dates requires a fresh preview and confirmation. If the quote expires, review the replacement carefully. Never assume an old checkbox confirms a changed price or schedule.

> **Existing purchases** Previously accepted ads retain their original agreed timing and terms. This update does not reprice them or invent a meeting duration. An already-purchased ad may finish its agreed run if the software membership ends; that does not extend its own cutoff.

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EVERYDAY USER FUNCTIONS

Advertise a scheduled Zoom meeting

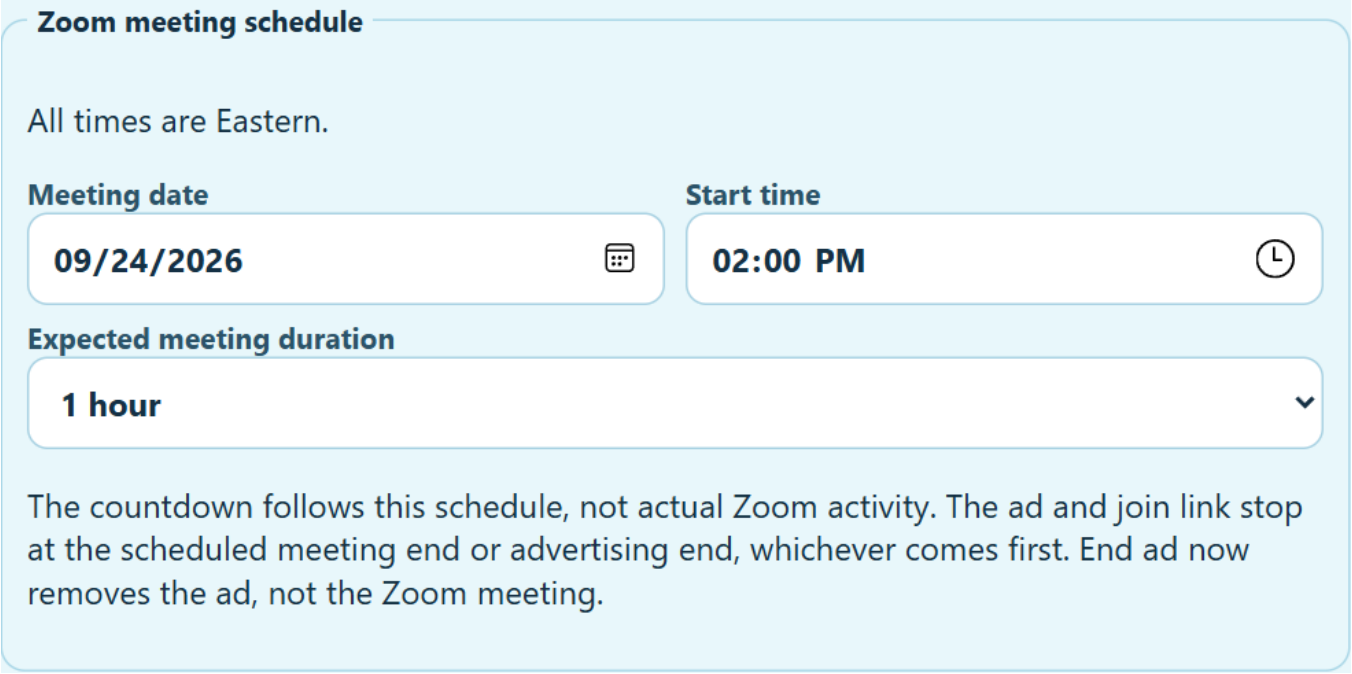

Figure 23. A supported participant link reveals the Zoom meeting schedule. Use public invitation details, never a private host-start link.

1. Create the meeting in Zoom separately. Paste its HTTPS participant invitation link into **Public business contact details** or **Announcement**. Supported links use Zoom's zoom.us or zoom.com domains; text drawn inside a flyer is not a clickable invitation.
2. Complete **Meeting date**, **Start time** and duration in **Eastern Time**. Choose 30 minutes, 1 hour, 2 hours or Custom (1-1,440 minutes). If a clock-change time occurs twice, choose the intended first or second occurrence. A time skipped by daylight saving is not valid.
3. Choose the ad run, then inspect its meeting time and effective end in the final preview. Publication ends at the earlier of the meeting end or advertising end.

The ad shows a countdown, then **Zoom now in progress / Click to join** during the scheduled meeting window. This describes the submitted schedule, not proof that the host has started. Zoom sign-in or a waiting room may still apply.

Pausing rotation, changing tabs or refreshing does not restart the clock. **End ad now** removes the ad; it does not end the Zoom meeting itself. Never include a private host token or client-identifying information.

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EVERYDAY USER FUNCTIONS

Track, delete or take down your ad

Open **Network Center > My ads**. Use Refresh after returning from Stripe. Inspect the ad's state, settlement, duration and start/end dates.

State or action	Meaning
Quoted	A prepared preview. Complete its review before the quote expires, or delete the unpaid draft.
Awaiting payment	Checkout is not yet verified as settled. Review/resume checkout or refresh payment status.
Pending review	Verified settlement is recorded; TQH review is still required. Publication has not started, but fixed calendar/meeting deadlines continue to approach.
Scheduled	Approved, but waiting for the selected start. The original end remains fixed.
Live	Approved and currently within its run. Check start/end times.
Rejected / removed	Read the moderator's reason. Do not assume a refund was created.
Expired / cancelled	The ad is no longer running. Inspect its history before creating a replacement.

Delete an unpaid ad

Select **Delete unpaid ad** on the intended record and confirm. The service first closes and verifies any open Stripe checkout. If payment completed or is uncertain, deletion is refused and the record must be reviewed. Deleted unpaid ads disappear from My ads; an audit record is retained.

Take down a settled ad

Use **Take down without refund**, or **End ad now** on a live meeting ad, only if you intend to end a pending, scheduled or live ad. Read the amount and irreversible confirmation. Paid history is retained; a takedown is not deletion and does not issue a refund or unused-time credit. It does not cancel a Zoom meeting.

If a quote expired, payment looks duplicated, or the result is uncertain, refresh and contact support with the ad title/state and time. Never send a full card number or repeat payment just to clear an error.

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CENTER ADMINISTRATION

The administration-only Dashboard

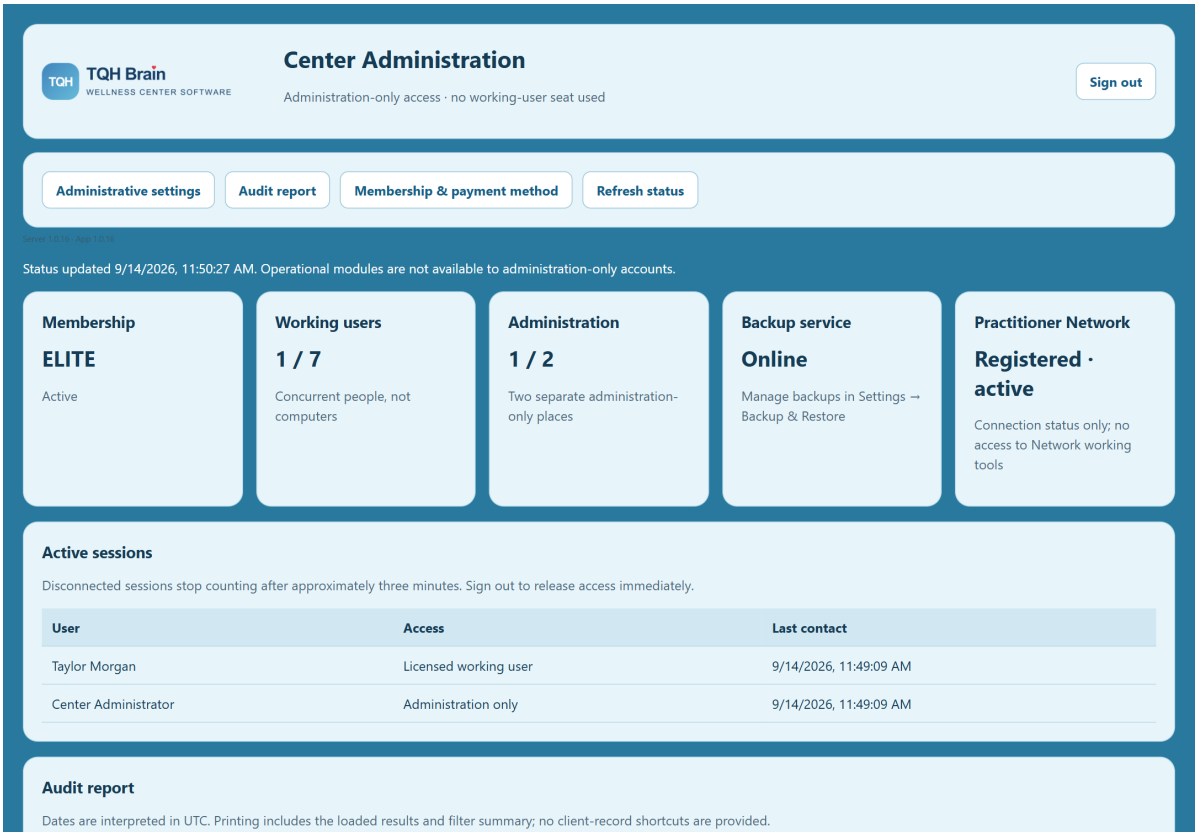

Figure 24. Administration-only accounts have a status and management workspace, not additional access to working modules.

Sign in with the Center's Primary or Secondary Administrator account. The Administration Dashboard shows membership status, working-user occupancy, administration occupancy, backup readiness and Network connection status.

- **Administrative settings** opens Center configuration and user management.
- **Audit report** opens filtered activity history and its print controls.
- **Membership & payment method** opens billing information and the owner-portal link.
- **Refresh status** reloads the current server response.

Active sessions show the person, access category and last contact. Two administration-only places are separate from the membership's working-user allowance. A person who also performs client work needs a separate working account and an available working seat.

> **Status is not working access** Administration-only accounts cannot use client, session, scheduling, inventory, report-production or Network working tools. They may manage settings and print the administrative audit report. A missing status or error is not proof that usage is zero.

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CENTER ADMINISTRATION

Maintain Center information

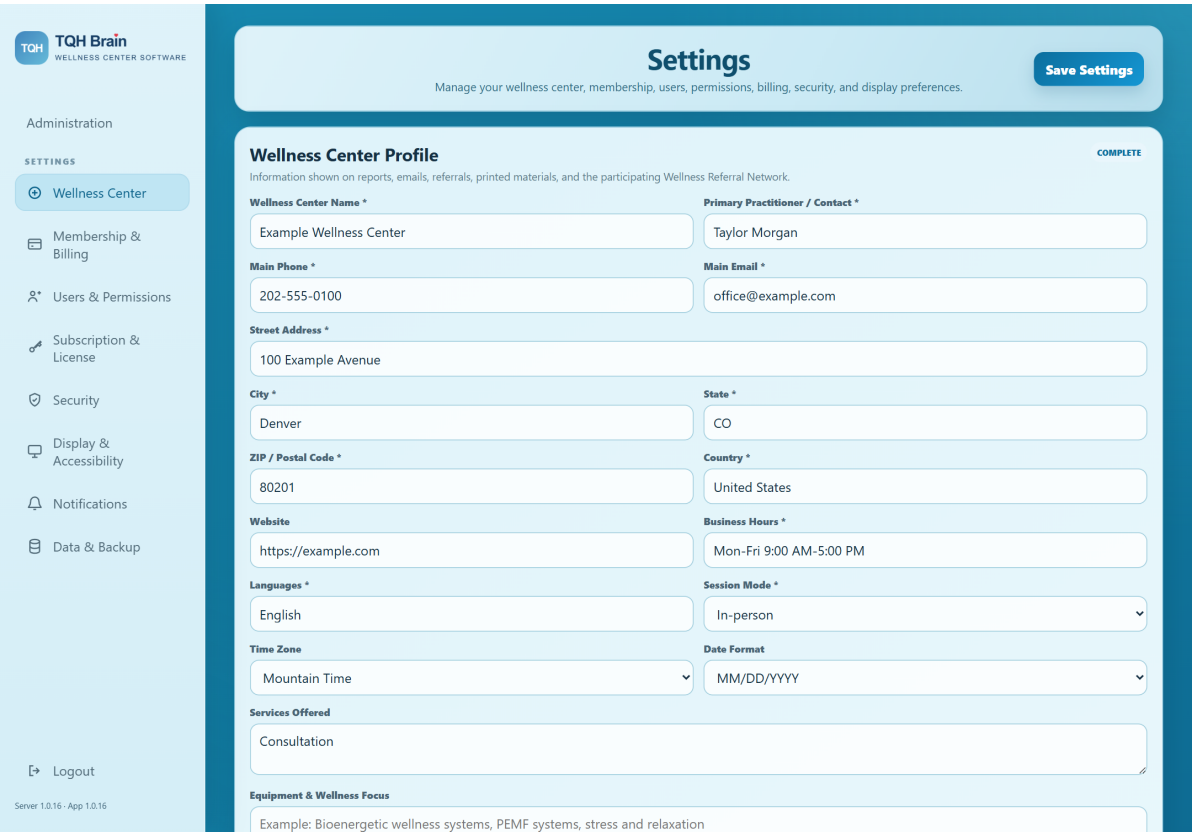

Figure 25. Administrative Settings: Center profile and configuration navigation. Example details are fictional.

1. Open **Settings > Wellness Center** (the Center information section).
2. Verify the chosen Center name, primary contact, phone, email and complete address. A Center name is not necessarily a legal business name. Individuals use their personal contact details; review what will appear publicly before listing in the Network.
3. Complete the website, business hours, languages, session mode, services and description where offered. These are Center information, not client notes.
4. Save and review the confirmation. Reopen the section to confirm the saved values.

Keep the customer owner portal's Center profile consistent. Directory publication and accepting-new-client choices must reflect your intentions; a complete profile alone does not guarantee a public listing or Network eligibility.

Do not put a client's identity, medical details, passwords or private staff information into the Center description. Profile details may be used in directory, referral or customer-facing communication.

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CENTER ADMINISTRATION

Add and maintain staff accounts

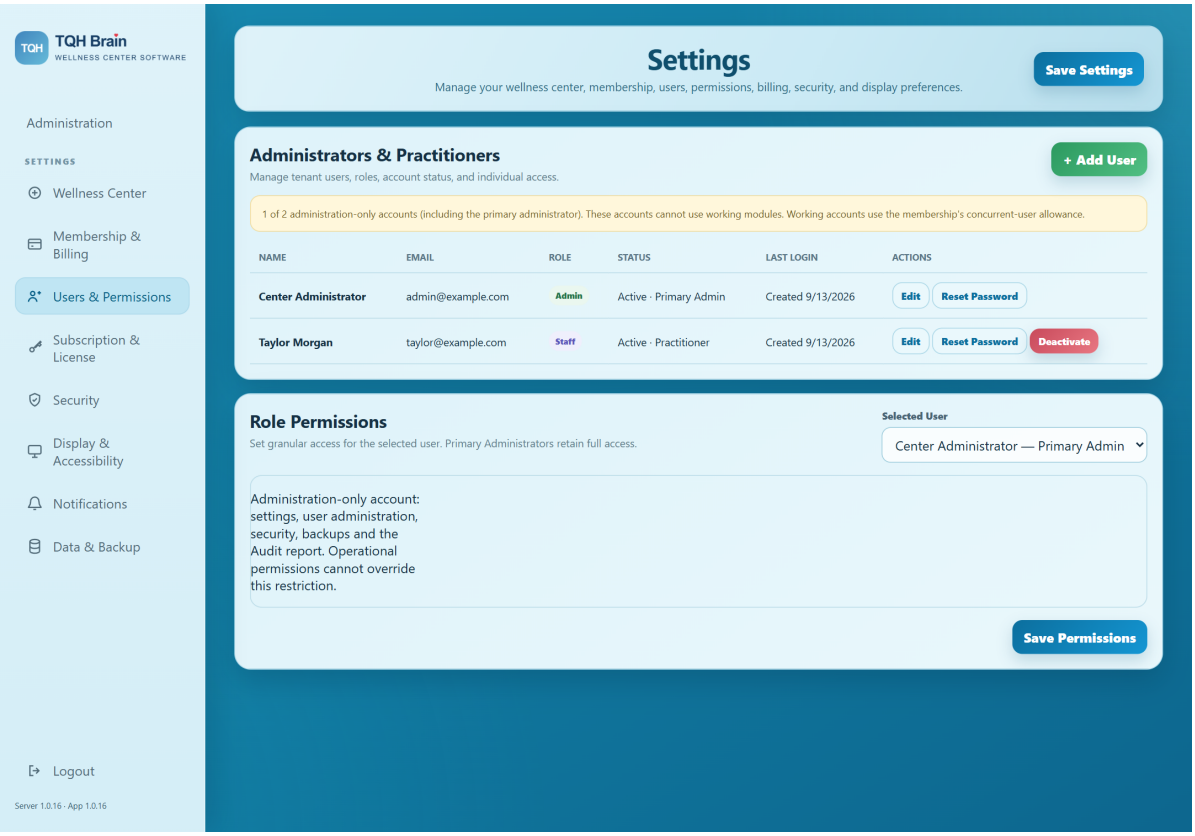

Figure 26. Users & Permissions separates administration-only accounts from working accounts.

1. Open **Settings > Users & Permissions**, then **Add User**.
2. Enter the person's individual name/email and select the appropriate account type. Use Primary/Secondary Administrator only for administration-only access; use a working account for practitioners and other staff doing client work.
3. Set the available role/access defaults, then save. Check that the status and account type are correct.
4. Provide initial sign-in instructions privately. The user must complete required password change, profile and MFA steps.

Use **Edit** for authorized changes, **Reset Password** for sign-in recovery, **Reset MFA** when the person's authenticator must be replaced, and **Deactivate** when access should end. Verify the person before resetting credentials. Retain historical records and do not repurpose another person's login.

> **No shared accounts** One login per person preserves attribution and proper concurrent-user counting. Do not create a working practitioner with an Admin role as a way to bypass licensing or financial restrictions.

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CENTER ADMINISTRATION

Assign permissions deliberately

Permissions and membership both apply. Giving a permission does not add a module that the membership lacks, bypass administration-only restrictions or increase the concurrent working-user limit.

1. In **Users & Permissions**, select the intended user in the permission area.
2. Review the account type and role defaults. Enable only the functions needed for that person's work.
3. Select **Save Permissions**. Have the person sign out and back in, then verify the intended task.

Permission group	What to consider
Clients and documents	Viewing, adding, editing and deleting clients are separate capabilities. Document viewing, deletion and document-type settings also need appropriate access.
Import and export	Client import/export, report export, inventory export, document upload/download and document-index export are separate grants. Seeing a screen does not automatically permit its export.
Sessions and Scheduler	Session protocols/history and Scheduler viewing/editing/history control different activities. Scheduler configuration is an editing responsibility.
Forms	Sending forms, reviewing returns, importing accepted forms and managing templates should match the person's duties.
Inventory and marketing	Viewing stock does not imply adding, editing or deleting it. Campaign and communication functions require their own access.
Network	Viewing, posting, replying, reacting/saving, reporting and Center-scoped moderation are distinct. Purchasing advertisements requires an explicit grant.
Financial information	The explicit financial-view permission is for an authorized working user. It does not replace report/view/export permissions.

Test both an allowed and a disallowed task when changing access. A denied action is not necessarily a fault: check account type, membership, permission and the financial restriction before escalating.

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CENTER ADMINISTRATION

Financial visibility and working seats

The **Hide financial information from practitioners** security setting is a Center-wide restriction. Keep it enabled when ordinary practitioners should not see financial figures or export financial reports.

A designated working user who needs financial access may receive **View financial information** explicitly. That user still consumes a working seat and still needs the appropriate Reports, client-record and export permissions for the task. This is not one of the two free administration-only accounts.

Suggested access review

1. Keep the Center-wide financial restriction at your intended setting.
2. Identify the named working user responsible for financial reporting.
3. Grant financial viewing and only the required report/export permissions.
4. Sign out and back in as that user. Verify both on-screen totals and the intended export.
5. Test an ordinary practitioner account to confirm restricted values remain protected.

> **Audit versus business reports** Administration-only accounts can print the administrative audit report. They are not additional report-production or client-working accounts. Business reports belong to appropriately authorized working users.

Read restriction messages carefully. A protected client-level report may require both client visibility and report access even when financial viewing is allowed. Do not remove broad security settings just to make one report load.

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CENTER ADMINISTRATION

Password, MFA and display settings

Security & Compliance

Open the Security section in Settings. Review the password minimum, automatic logout interval, required MFA for administrators/all users, and financial-visibility restriction. Current password minimum choices are 12 or 16 characters. Prefer a unique passphrase and follow your Center's stronger requirements.

MFA enrollment belongs to the individual. Never collect everyone's authenticator setup keys. When resetting MFA, verify identity and make sure the user can complete new enrollment securely. See Authenticator and sign-in recovery (p. 32).

Automatic logout protects unattended workstations but does not replace locking Windows when stepping away. Save work before leaving. Audit logging is a required protection; it is not a switch to turn off to reduce history.

Display & Accessibility

Open **Display settings** from the Dashboard for your personal preferences. Choose application scale, text size and layout, then use **Preview** and **Apply**. Your saved preferences belong to your user account. Available scale choices range from 90% to 130%; text sizes range from small to extra large. Auto/Desktop/Laptop/Tablet layouts change presentation, not permissions.

If a control appears missing, return to a suitable layout, check browser zoom and scroll. Enlarging the display may move controls below the visible area. Do not mistake a responsive menu for a lost feature.

Version information

In Settings the server and application versions appear below **Logout**. On the user Dashboard they appear under **Center Connection**. Other pages place the small version line beneath the menu area; the login screen places it below the password guidance. Record both versions when requesting support.

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CENTER ADMINISTRATION

Filter and print the Audit report

1. Sign in with an administration-only account and select **Audit report** on the Administration Dashboard.
2. Set the From and To dates. The initial range is approximately the last 30 days.
3. Narrow by user, action, outcome and/or search text as appropriate.
4. Select **Load report**. Check the date range, applied filters and returned records before printing.
5. If the report is limited/truncated, narrow the range or filters and load again. A response is limited to 2,000 rows; it is not necessarily the complete history.
6. Select **Print audit report** and use the browser print preview. Confirm paper size, destination and page range before printing or saving a PDF.

The Print control is unavailable when there is no printable result or the filters have changed without reloading. Printing itself is recorded as an audit action. A printout represents the loaded report, not future activity.

Responsible use

Audit data may identify users, actions and sensitive record activity. Limit access and distribution. Store exported or printed history according to your Center's retention and incident procedures. Do not edit an audit extract and present it as the original system record.

An unsuccessful event can help explain access denials or failed work, but does not by itself establish misconduct. Correlate the time, user, action and outcome before deciding what happened.

See Printing, downloads and file protection (p. 89) for print handling and Resolve common access and display problems (p. 90) for information to collect for support.

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CENTER ADMINISTRATION

Notification preferences and attention items

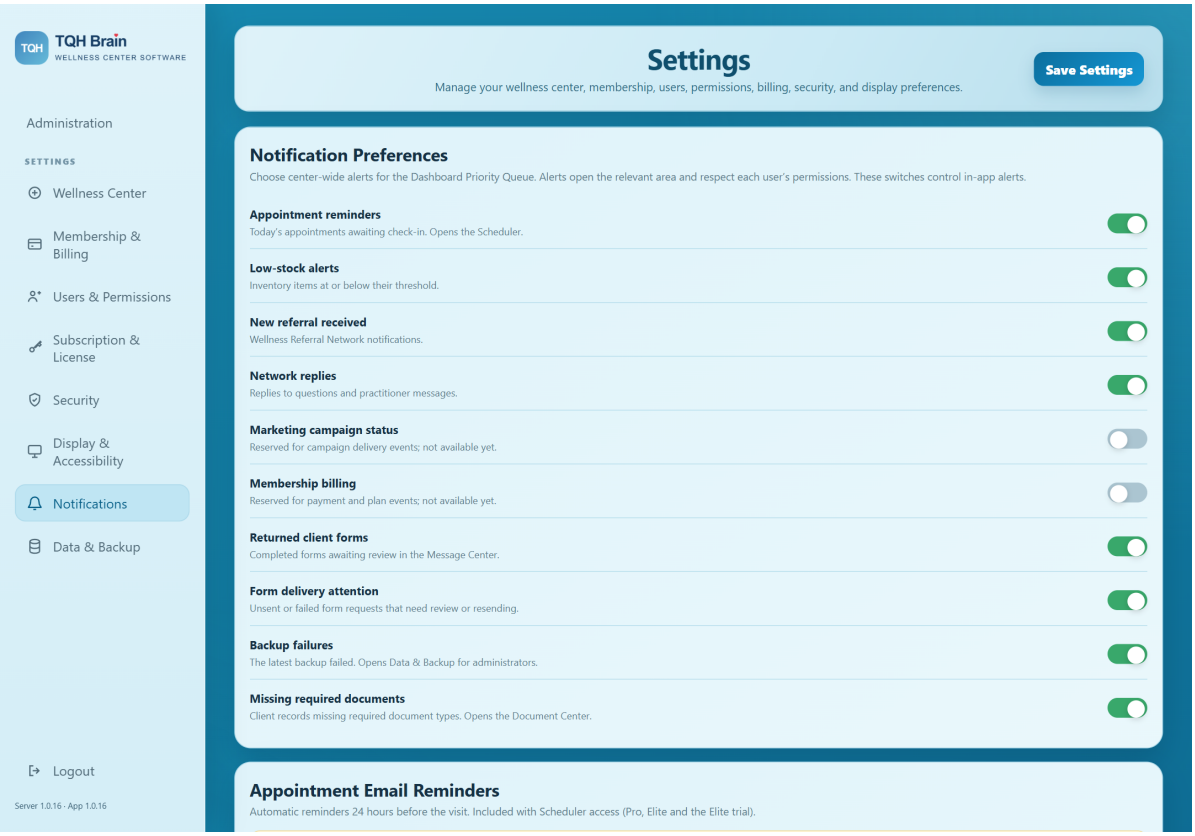

Figure 27. Notification preferences determine which attention items appear; appointment-email settings are a separate section below.

Open **Settings > Notifications**. Choose the relevant attention categories: waiting appointments/check-in, low stock, new referrals, Network replies, returned forms, delivery attention, backup failures and missing documents. Save your changes.

These preferences control in-app attention items; they are not permission grants and do not automatically send clients an email. A user must still have access to the underlying module to act on an item.

Some controls may be marked reserved or unavailable, including campaign-status or membership-billing notification switches. Do not rely on a disabled control as an active monitoring service.

Appointment email reminders have their own eligibility, sender status, time-zone and enable controls. Continue with Enable 24-hour appointment emails (p. 76).

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CENTER ADMINISTRATION

Enable 24-hour appointment emails

Automatic appointment reminders are available with Scheduler access (Pro, Elite and an eligible full trial). The Center server must remain online and the connected email service must be ready.

1. Open **Settings > Notifications** and locate **Appointment email reminders**.
2. Read the readiness/status message. Resolve any activation, membership or sender-configuration problem through support.
3. Select the Center's correct time zone. Enable reminders and save the reminder settings.
4. Confirm each intended client has a valid email address and appointment-email permission. An address alone is not consent.
5. Verify the appointment date, time and client. Review reminder status rather than assuming the email was sent.

Messages use **no-reply@tqhbrain.com** and contain limited appointment information: the Center, appointment date/time and Center contact phone, without treatment details. The no-reply address is not a monitored appointment-change inbox; clients should use the Center's contact details.

Timing and exceptions

The service checks periodically around the 24-hour point, with an approximately one-hour catch-up window. An appointment made less than roughly 23 hours before the visit will not receive this 24-hour reminder. A server that was offline through the window may leave the reminder expired/missed.

Missing or ambiguous local times (for example during daylight-saving changes), missing email/permission or cancelled appointments require appropriate staff handling. A reminder is not a client acceptance or reconfirmation of attendance.

Read the outcome correctly

Provider-accepted means the sending provider accepted the message, not that it arrived in the inbox. Review retry, rejection, uncertain and expired states. An uncertain result is not automatically resent to avoid duplicates. Use the Center's approved contact process when timely manual follow-up is needed.

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CENTER ADMINISTRATION

Configure and verify backups

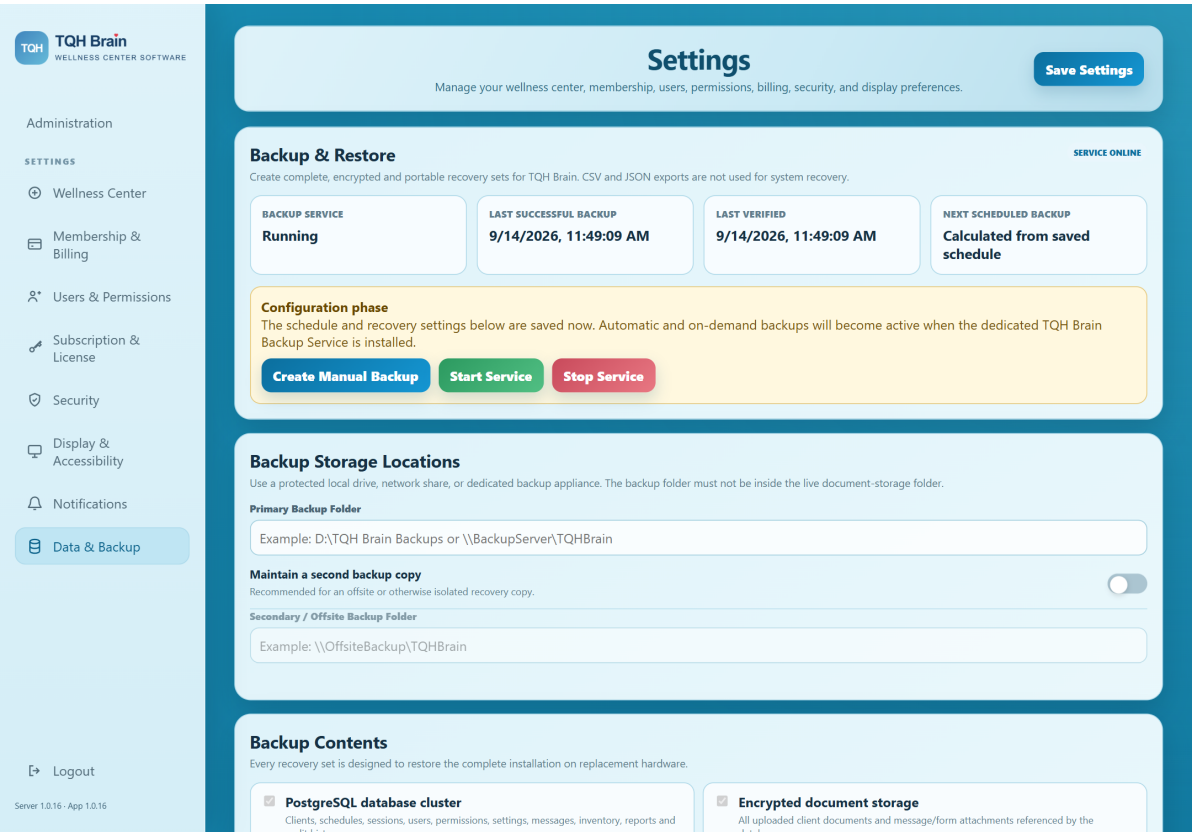

Figure 28. Backup & Restore uses server-side destinations and reports the backup service's status.

1. Open **Settings > Data & Backup / Backup & Restore**. Confirm the backup service is registered and running.
2. Set the approved primary destination and optional secondary destination. Paths are on the server or an accessible server-side share, not automatically your workstation's folders.
3. Choose daily, weekly or monthly scheduling, retention, compression and appropriate failure notifications. Save the configuration.
4. Select **Create Manual Backup** to produce a current recovery point when needed.
5. Check job completion, last successful backup and validation/verification status. A queued job or a file's existence is not a successful restore test.

The full backup covers the database, encrypted document content, required configuration and integrity information. A client transfer is a profile-migration file, not a full backup. Keep an approved off-server copy and the recovery materials described in Protect the portable recovery key (p. 79).

Do not stop the backup service as routine housekeeping. Escalate a failed or missing heartbeat and review the next scheduled run after a server restart.

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CENTER ADMINISTRATION

Choose a mapped network backup drive

Use **Browse (...)** beside a backup destination while signed in as an administrator locally on the TQH Brain Server. The picker lists local drives and mappings found in Windows sessions on that Server, including saved mappings that are disconnected. A mapping on a different Workstation is not a Server mapping.

1. Select the named destination, for example **Z: - \\TQH-DEV-WS\BackupTestNetwork**. Open the desired folder and choose **Select This Folder**. TQH Brain saves the network address behind the letter so background backups can use it without a signed-in desktop session.
2. If the folder cannot open, expand **Network sign-in**. Enter a Windows account authorized for that share, such as **TQH-DEV-WS\backupuser**, and its password. Use the Server's trusted HTTPS app address. The account needs both share and folder permission to create, read and delete backup files.
3. Select **Save Network Sign-in**. Windows stores it on this Server for the TQH Brain services. It applies to the named network computer, including other shares there. An existing credential managed outside this Center is not overwritten.
4. Select the destination, save backup settings, then run **Test Saved Backup Folders**. A saved sign-in or successful folder browse does not prove that the Backup Service can write there.
5. Run a manual backup and confirm success, verification and the expected copy in each enabled destination. Test access again after a Server restart. Network availability and the authorized account are required when scheduled backups run.

Moving or changing network access

Share passwords are not included in app exports, recovery packages or backup archives. Re-enter network sign-in on a replacement Server. **Remove Saved Sign-in** removes this Center's saved credential for that computer; existing Windows connections may remain active until restart. Re-test before relying on backups.

> **One letter, different destinations** If Windows users map the same letter differently, choose the explicit named network destination. TQH Brain will not guess which mapping to use. Map shares through Windows on the Server when needed; changing a drive letter does not move existing backups.

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CENTER ADMINISTRATION

Protect the portable recovery key

Encrypted backups need the appropriate key material. A backup archive without a usable recovery key can be insufficient on a replacement server.

1. In Backup & Restore, open **Manage Recovery Key**.
2. Choose an approved server-side destination for the portable key package.
3. Enter and confirm a strong passphrase of at least 12 characters, then create the package.
4. Record the package location and protect the passphrase separately using your organization's approved method.
5. Include recovery-key availability in your recovery drill, not just archive creation.

On the server, open **Start > TQH Brain Recovery** and select the archive and key package together. The recovery tool restores the matching database, documents and application keys in one maintenance workflow. Separate key import is no longer available in the browser.

> **Separate protection** Do not keep the only key package, its passphrase and the only archive together on the same server. Do not email them together or paste them into support chat. Limit possession to authorized recovery personnel.

Review custody when administrators change. Losing a password or key cannot be solved by renaming a file. Contact TQH before moving encrypted document storage or attempting a manual database-only recovery.

Continue with Validate and restore safely (p. 80) only when a controlled restore is intended.

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CENTER ADMINISTRATION

Validate and restore safely

Recovery replaces the target database with the selected backup, including its original users and passwords. Ask users to save their work and sign out. Keep the original archive and recovery-key package unchanged.

1. Complete Server Setup on the target computer. Copy the **.tqhbackup** archive and **.tqhkey** package to a local drive. Have the recovery password available; do not send it to support.
2. Open **Start > TQH Brain > TQH Brain Recovery** as a Windows administrator. Select both files, enter the password and click **1. Check recovery files**.
3. Review the current center name/ID, backup center ID, archive version and successful checks. Check the replacement acknowledgment only for the intended target.
4. Disconnect this computer's network adapter, then click **2. Restore** and confirm. The tool stops both TQH services, preserves an encrypted safety copy, restores the database and matching keys, and verifies decrypted documents and protected values. Keep the window open.
5. After **Recovery verified**, shut down any other server using this recovered center. Reconnect the target to the network, check the only-active-copy acknowledgment, then click **3. Start recovered server**.
6. Sign in with the original account at **https://localhost:5001/login.html**. Check clients, documents, sessions and users. Review backup destinations and reminder settings before resuming them; create and verify a new manual backup.

> **Interrupted or failed recovery** Services remain disabled if recovery fails or the window closes before startup. Keep the displayed recovery folder and report; contact support before starting services or repeating a restore. Original target files and the encrypted safety copy remain in protected local storage.

Older archives without portable application keys and archives from a newer app version are refused. Pending cloud-file imports require review. Recovery reports support validation; actual sign-in and data checks remain necessary.

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CENTER ADMINISTRATION

Membership, license and payment details

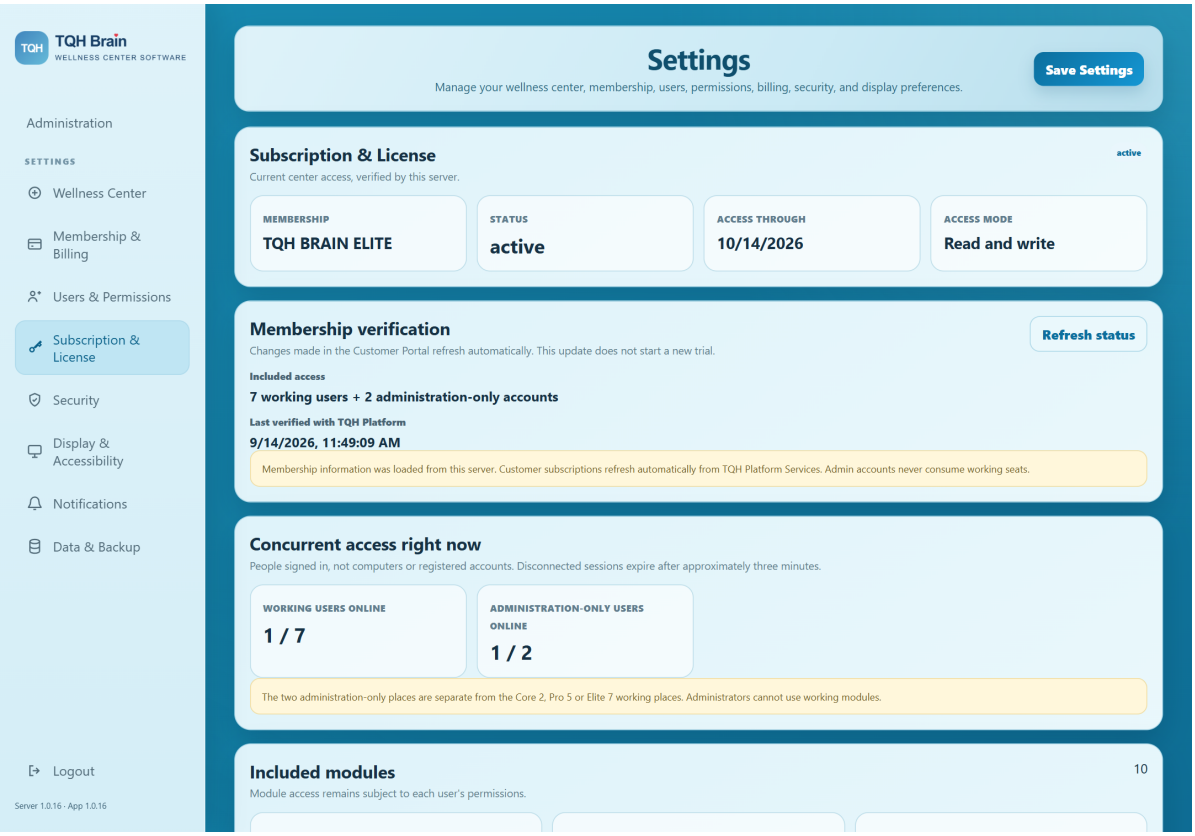

Figure 29. Subscription & License shows the server's current entitlement; the owner portal manages subscription payment details.

Review the current plan, state, access period, last verification and included modules in **Settings > Subscription & License**. Use the refresh/status control after a confirmed owner-portal change.

The app receives its entitlement from the connected customer account. Card setup, selecting a preferred plan and paying for an advertisement are not equivalent to starting or upgrading the software subscription.

Use **Membership & payment method** or the customer-portal link for owner billing. Sign in with the owner portal account, which is separate from a Center staff login. Only limited payment-method information is displayed; card numbers and security codes belong in Stripe's secure payment screen, not app notes.

For upgrade, cancellation and test/live interpretation see Subscribe, upgrade or cancel renewal (p. 87). If the portal is correct but the app is not, check connection and both versions, refresh, then contact support. Do not create a second Center or reinstall to correct an entitlement display.

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OWNER PORTAL

Customer account and secure signup

The website's customer-portal link opens the TQH Brain customer portal. This owner account manages your Center, installation activation and billing. It is not a client's record or a staff account within the installed app.

1. Enter the owner's email and a unique password. Select **Create Account** for a new owner or **Sign In** for an existing account.
2. If the account already exists, sign in or use **Reset Password** rather than repeatedly creating it.
3. Complete email verification using the message and the portal's verification refresh control.
4. Under **Account security**, select **Send Email Code** (default) and enter the emailed six-digit code, or choose **Set Up Authenticator**, scan the QR code and verify its code. Every sign-in requires verification.
5. Select **Individual** or **Business** in the profile. Individuals enter personal contact and home-address details; businesses enter the applicable legal business name and business address. Review Center details, directory choices and applicable terms before saving.
6. Keep this owner login secure and separate from staff onboarding. Do not distribute it to everyone using the app.

Email address confirmation, sign-in code verification, the Center profile and accepted terms remain necessary for activation. No credit card is required for the free trial. Email codes expire in 10 minutes and can be used once. Existing authenticator users can sign in, choose Use Email Verification Instead and verify the emailed code to switch. Sign in again afterward.

> **Recognize the destination** Open the portal from the official website or your saved verified link. Use your authenticator only for the account you intended to access. Never send TQH a password, current MFA code or authenticator setup secret.

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OWNER PORTAL

Individual or Business: your Center

Choose **Individual** for personal use, including individual Thera device owners. Choose **Business** for professional or business registration. The portal displays the relevant fields for the selected account type.

Individual	Business
First and last name, home address, phone, email and account credentials. No legal business name or business address is required.	Business information, including legal business name and business address, plus the required contact and account details.

A Center name can be any name

Every account has a **Center name**. It identifies your TQH Brain setup; it does not mean you operate a business. Use your own name or a name such as **Alex's Center**. Enter a legal name separately wherever the portal requests it for agreements or billing.

The same app and installer

Both account types receive an installation key and can download and activate the same software. No separate Individual app or installer is required. The installed app continues to use Center terminology and existing labels, including Wellness Center and Business Hours. Account type is shown in the online Admin portal, not in the app's Admin area.

Network participation

Individuals and Businesses can choose to list their Center in the Network. Review directory consent and public profile information before publishing, especially when using a home address. Participation remains subject to active access and the applicable Network permissions.

See Your free trial and what happens afterward (p. 84) for trial expiry and Free trial, download and activation (p. 86) for installation.

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OWNER PORTAL

Your free trial and what happens afterward

Start with 30 days of Elite

Eligible new customers start with the **free 30-day Elite trial**, beginning at successful installation activation. No credit card is required. Registration, download and activation do not automatically create a paid subscription or charge.

Choose Core, Pro or Elite

After the trial, choose **Core**, **Pro** or **Elite** according to your needs, including Core for personal use. Individual or Business registration does not force a particular paid plan. Review the current plan features, user limits, price and terms before explicitly authorizing a subscription when live billing becomes available.

Saving a preferred plan is not a purchase. There is no automatic conversion from the free trial to a paid subscription.

If you do not subscribe

After 30 days, without an active subscription, the app switches to **read-only access**. Existing records remain available to view and **are not deleted** because the trial ended. Creating or changing records requires active working access. Network access is suspended without an active entitlement.

Keep normal backups and recovery material. Read-only access is not a substitute for a backup, and reinstalling does not restart the trial.

> **Current payment availability** Live Stripe subscription billing is still being completed. A configured company Stripe account does not enable live payments in TQH Brain. Until TQH releases the live integration, do not assume that a sandbox checkout creates a paid subscription. Contact support if your trial is ending before live billing is available.

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OWNER PORTAL

Subscription coupons and test billing

> **Release availability** Live subscription payments are not yet available in this release. The procedures below describe the billing workflow for release testing and the forthcoming enabled service. Do not treat sandbox checkout or a configured Stripe account as live billing. Follow the portal release notice before attempting a real purchase.

Under Membership, select a plan and enter an optional coupon code. Select **Check coupon** to see the percentage, duration, discounted monthly price and standard price afterward. Checking a code or saving a preferred plan does not create a subscription.

Confirming an offer

Confirm checkout in Stripe to subscribe. An offer such as **50% off for 6 months** begins after the free trial ends, or at subscription start if the trial has already ended. After the discounted months, the standard monthly price resumes. One coupon applies per new subscription. Read the actual checkout terms before confirming.

Cards and renewals

Checkout uses cards only. Use the owner portal to update a payment method or cancel renewal. Refresh billing status after returning from Stripe. Cancellation preserves the access period shown in the portal; it does not itself erase Center records.

During release testing

Stripe remains in sandbox. Use the approved test card procedure and verify the test-mode label. Sandbox activity does not collect real payments. TQH controls the billing environment centrally; staff cannot change it in the desktop app.

Advertising coupons apply to ad purchases separately from subscription offers. Advertising purchases require an active paid membership; a trial alone does not qualify, including in sandbox.

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OWNER PORTAL

Free trial, download and activation

For the complete illustrated installation walkthrough, start at Start here: one installer, two roles (p. 8).

No card required for the free trial

Both Individuals and Businesses can register, receive an installation key and download the software without a credit card. The free 30-day Elite trial begins at successful eligible activation. No subscription or charge starts automatically.

Download and first installation

1. Follow the portal's download/activation section after account, profile and required setup checks are complete.
2. Download the approved TQH installer. One download supports the Server and Workstation installation choices; select the role for that computer.
3. On the designated Server computer, follow the Server setup. Create the activation code when prompted by the portal and use it only for the intended Center installation.
4. Complete the initial administration-only account and Center setup. Protect the activation code as a credential; do not put it in screenshots.
5. On additional workstations, choose the Workstation option and connect to the designated Center server. Do not create another independent Server installation for the same Center by mistake.
6. Start TQH Brain with its blue desktop shortcut. Sign in, check Center Connection and verify the server/application versions.

The trial begins with the first successful eligible activation, not each reinstall. Codes expire; follow the expiry shown by the portal. A replacement server should follow a coordinated backup/restore and activation procedure rather than claiming another trial.

For upgrades to an existing installation, use the approved update instructions and a verified backup. Do not uninstall, wipe a VM or delete Center records merely because a page appears stale.

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OWNER PORTAL

Subscribe, upgrade or cancel renewal

> **Release availability** Live subscription payments are not yet available in this release. The procedures below describe the billing workflow for release testing and the forthcoming enabled service. Do not treat sandbox checkout or a configured Stripe account as live billing. Follow the portal release notice before attempting a real purchase.

Choose the software membership

Review Core, Pro and Elite in the portal, including working-user limits and included modules. During a trial, **Save Preferred Plan (No Charge)** records a choice; it does not itself purchase the subscription. When subscribing, select **Review subscription offer**. Read the price, renewal term, trial/promotion timing and UTC charge/cancellation deadline. Actively check the separate recurring-payment authorization, then continue to Stripe checkout. Terms acceptance and marketing consent are separate.

Upgrade an active subscription

Select the higher eligible plan and click **Review Prorated Upgrade**. Read the itemized amount due now, recurring price, discount timing and UTC renewal deadline. Check the separate payment authorization and click **Confirm Upgrade Payment** to attempt payment. If further payment authentication is needed, finish it on Stripe's invoice page. A declined payment leaves the upgrade pending and preserves the previous paid plan. Refresh billing status and the app's Subscription & License information after payment.

Update the card

Use the payment-method update control to open Stripe's secure flow. Check the resulting card summary and return to refresh. Changing the card while purchasing a bulletin ad is separate from changing the subscription card.

Cancel renewal or the trial

Read **Cancel Renewal / Trial** carefully. Review the displayed effective date and remaining access; cancellation does not necessarily end the already-paid period immediately. After the trial expires without a subscription, the app switches to read-only and existing records are not deleted. Network access requires an active entitlement. At the end of paid access, working and Network access are restricted. A separately purchased ad may still finish its already-paid approved run.

> **No payment by assumption** A saved card, a preferred plan, a returned checkout page or an ad payment is not proof of an active software subscription. Verify the portal's billing state. Test/sandbox activity is not production payment activity.

Use **View billing confirmations** and **Save confirmation** to retain recorded terms. If an outcome is unclear, refresh status or contact support before repeating a purchase. Never share full card details in support requests.

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REFERENCE AND QUICK HELP

Handle sensitive information responsibly

Client names combined with health/service information, dates, notes, documents and many appointment reports can be sensitive. Do not assume an export is non-sensitive simply because it contains no diagnosis.

- Use individual accounts, minimum appropriate access and approved devices. Lock unattended workstations.
- Confirm the client and intended recipient before sending, printing, uploading or exporting.
- Use encrypted TQH client-transfer packages only for their intended TQH-to-TQH import workflow. Share passphrases separately.
- Protect downloaded PDFs, CSV files, Excel workbooks and paper copies. Application storage protection does not automatically follow a printed or separately saved copy.
- Keep identifying client information out of public/Network posts, ad flyers, Center descriptions and support screenshots.
- Follow Center retention, disposal, incident and communication policies. Report a wrong-recipient disclosure promptly through your organization's process.

Compliance is an organizational responsibility

Security features are not a certification that a particular Center is HIPAA compliant. Where HIPAA applies, administrative, physical and technical safeguards must be addressed. HHS's minimum-necessary guidance also has defined exceptions; follow your organization's applicable policies rather than treating it as an absolute rule for every disclosure.

Official references: HHS Security Rule summary and HHS minimum necessary guidance.

This handbook provides operating instructions, not a legal determination about your Center's obligations. Seek appropriate professional advice for your organization's requirements.

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REFERENCE AND QUICK HELP

Printing, downloads and file protection

1. Select the intended record/report and load the current filters before printing.
2. Open **Print** and inspect the browser preview. Verify the Center, client, dates, included columns and number of pages.
3. Choose an authorized printer or approved PDF destination. Confirm paper size, orientation, scale and page range.
4. Collect pages immediately. Check that no unrelated client information was included and dispose of unneeded copies securely.

Excel and browser downloads

An export normally downloads a file; Excel may open through the computer/browser's configured behavior. Otherwise open the completed download. TQH Brain does not guarantee that a browser will launch Excel automatically. Preserve the correct extension and use trusted spreadsheet software.

Protected report workbooks require the export password. A browser's Save as PDF does not automatically encrypt the result. CSV is plain text; do not treat an inventory or document-index CSV as password-protected.

File or output	Appropriate handling
Client transfer	Encrypted package for another TQH installation; not a spreadsheet or full backup.
Client-level report	Use the required protected export and a separately communicated password. Limit distribution.
Document/index/printout	May contain client information; control access even when the source app required sign-in.
Inventory export	Review contents and business sensitivity; keep formulas/links from untrusted files from running automatically.
Backup and recovery key	Restricted recovery materials; follow the backup/key procedures, not ordinary email attachment sharing.

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REFERENCE AND QUICK HELP

Resolve common access and display problems

What you see	What to do
Cannot sign in / account exists	Use the correct app or owner-portal login. Check the email, password and MFA. Request the appropriate administrator/owner recovery instead of creating duplicate accounts.
Working-user limit reached	Ask an inactive user to sign out. Disconnected sessions usually age out after about three minutes. Do not share a login or use an administration-only account for client work.
403 / permission denied	Check user type, membership, explicit task/export permissions and financial visibility. Sign out/in after approved changes.
404 / feature unavailable	Record the page/action and both app/server versions. A stale interface or mismatched server may be involved. Use the approved update process; do not repeatedly submit payments.
503 / connection unavailable	Check Center Connection and server/network availability. Cloud-dependent Network, email or billing features may be unavailable even when local records work.
Old logo, layout or version	Save work, sign out and reopen the correct Center address/shortcut. Refresh the page. If it persists, give support both versions and the address without credentials.
No report rows	Check dates, filters and permissions. A loading error is different from zero matching records.
Missing module or disabled action	Review membership and task permissions. A disabled/reserved feature is not made available by changing browser zoom.
Email accepted but not received	Verify the recipient, status and approved manual follow-up; provider acceptance is not inbox delivery. Avoid repeated submissions.
Backup, restore or payment uncertain	Stop repeating the action, preserve the exact result and contact support. Do not delete records to clear a status.

For support provide the action, time/time zone, exact error, versions, expected result and a redacted screenshot. Do not include passwords, MFA secrets, full card data or identifying client details.

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REFERENCE AND QUICK HELP

Daily and periodic operating checklist

Start of day

- Sign in with your own account. Verify the intended Center and server connection.
- Review today's schedule and attention items. Resolve missing documents or incomplete forms using approved procedures.
- Check relevant communication/reminder exceptions. Do not treat a sent reminder as attendance confirmation.

During client work

- Confirm the selected client before every appointment, session, document or print action.
- Save the intended record. Check any separate inventory or delivery result.
- Use the minimum appropriate information in communications; keep the Network de-identified.

End of day

- Reconcile recorded appointment status, payments and session inventory movements as appropriate to your role.
- Save and close work, sign out, collect printouts and secure downloaded files.
- Leave the designated server available for scheduled backup and reminder processing.

Administrator review

- Check backup completion and periodically test recovery, including the portable key.
- Review user access, inactive staff, MFA and financial/export grants.
- Keep Center contact information, time zone and notification routing current.
- Check entitlement/renewal status and authorized software updates. Preserve recovery points before changes.

When something is uncertain

Do not create a duplicate charge, campaign, client, Center or session just to remove an error. Read the outcome and verify what completed before retrying.

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REFERENCE AND QUICK HELP

Glossary

Term	Meaning in this handbook
Center / Wellness Center	The organization using its TQH Brain installation. Some technical identifiers may still use the historical word “practice.”
Practitioner	A working user. It is not another name for an administration-only account.
Working seat	A concurrent person using working functions; the membership includes 2, 5 or 7.
Administration-only account	One of two separate management accounts, without working-module access.
Owner portal	The website-linked account for Center registration, activation, membership and card management.
Server / workstation	The computer hosting the Center's services/data, and a computer connecting to that server.
Entitlement	The verified membership state, time period and modules available to the installation.
Draft / saved session	Work in progress versus a session committed to the selected client's history.
Client transfer / full backup	An encrypted profile migration package versus recovery of the database, documents and required configuration.
Provider accepted	An email service accepted a request; this does not prove inbox delivery.
Sandbox	A test-payment environment. It must not be confused with live payment processing.
Proration	The adjustment shown by billing when an eligible active subscription changes during its period.
MFA / ePHI	Multi-factor authentication / electronic protected health information where the applicable legal definition is met.

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