H^{2}D Software

H^{2}D _practice User Manual

Version 2 – Updated August 11th, 2019

Welcome to H^{2}D _practice!

Using This Manual

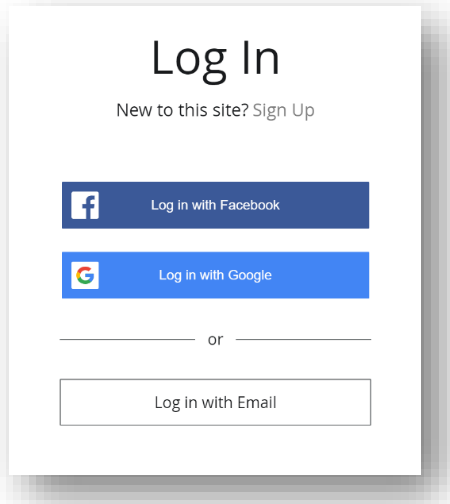
The different sections are bookmarked to help you navigate the topics. See the Table of Contents on the next page (ii) for an outline of this manual. A quick overview of the H^{2}D Software starts on page 1.

The H^{2}D Software logo at the top of every page is a clickable link to the support page on our website.

This user manual is an evolving document. We will always email you the latest version of the manual as changes are made. The latest updates are available on the support section of our website (https://www.h2dsoftware.com/support). You can also click the logo on the top left of this document.

A user login is required to access our member support pages on our website. When you click the link above or the "Sign In" link on our website, you will see this Log In page (right).

If this is your first time to sign into our website, click the "Sign Up" link next to "New to this site?"



Technical Support

If you ever need support, please do not hesitate to contact us.

We are here to help. You can schedule your next training session online at www.h2dsoftware.com/book

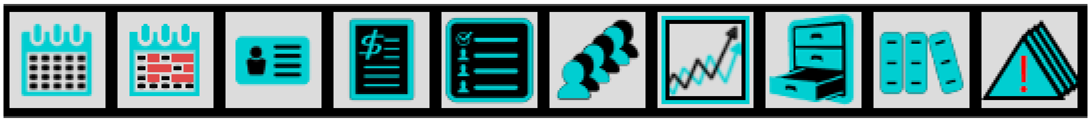
Send a support request through our helpdesk at https://desk.zoho.com/portal/h2dsoftware/

Video Tutorials

Anytime you see this icon in the manual you can click on it to see a video related to the topic it is next to. These videos are on our YouTube page so you will need to have an internet connection to view them. You may need to adjust your YouTube player settings to HD in order to see the videos clearly.

H^{2}D _practice gives you many tools to manage your practice and create highly specific care records. There are three different applications in the H^{2}D Software System for you and your team to utilize:

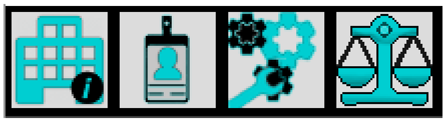
Front Desk FD



1 2 3 4 5 6 7 8 9 10

1. **Office Calendar** - Schedule and manage appointments. (Integration with Acuity Scheduling coming soon!)
2. **Block Scheduling** - Schedule entire care plans and custom batches of appointments.
3. **Demographics** - Manage patient demographics and add new patients.
4. **Patient Accounts Receivable (A/R) -** Enter charges, payments, and accounting adjustments. Print statements, superbills, and review patient ledgers.
5. **Appointment Lists** - View appointments, active appointments, unsigned records, and patient specific appointment lists. Filter patient appointments by date range and care episodes or care plans.
6. **Patient List** - View list of all, active, and inactive patients with links to Pt. Summary screen (CR only) Pt. A/R, and Demographics. Narrow the list with patient searching capabilities.
7. **Office Metrics** - Review details of practice performance metrics, appointment statistics, collections, etc.
8. **Office Information** - View Accounts Receivable reports for all patients, patients with balances, with credits, and with past due balances. View Appointment Statistics for the last 30 days.
9. **Reports** - The only feature currently offered in this screen is to print account statements for all patients, active patients only, and/or patients with balances only.
10. **Alerts and Reminders** -Create alerts and reminders for patients and staff members.

Office Management OM



1 2 3 4

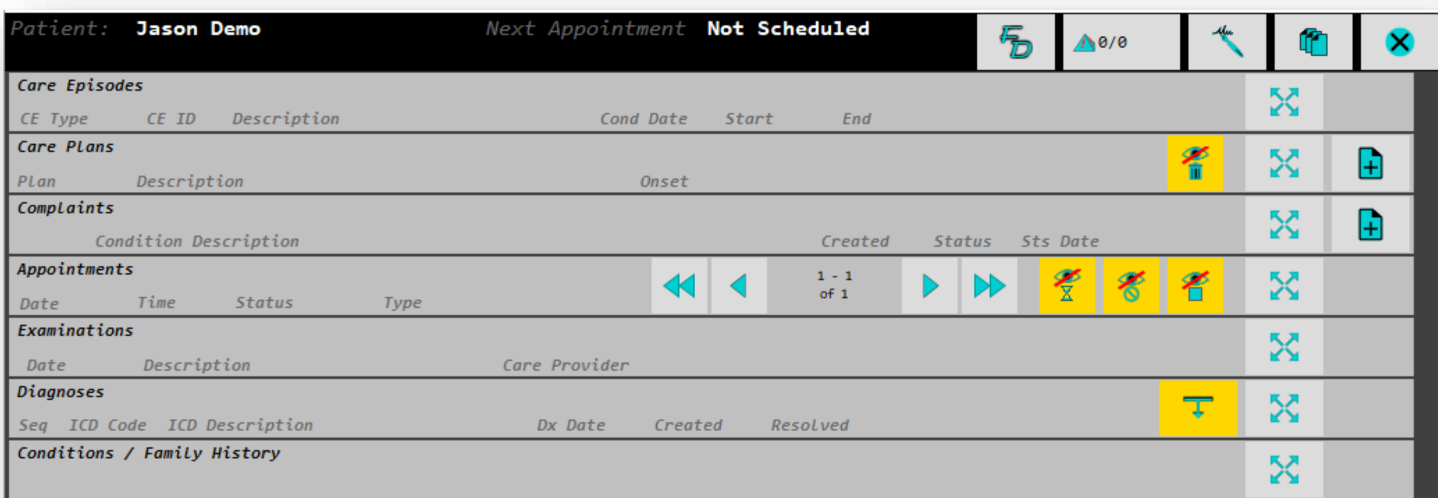
1. **Office Demographics** - update your office demographics, see your customer # and license status with H^{2}D Software
2. **Practice Staff Management** - manage practice staff demographics, user login and access
3. **Controls and Settings** - configure system settings; rearrange the patient summary screen; manage service codes, merchandise codes, accounting adjustment codes, care plans, calendar settings, adjustment types, customize adjustment activities, physiotherapy, and leg checks
4. **Patient Ledger Daily Reconciliation** - review and lock accounting activity by date

Care Records

This is the application you will use to create and maintain patient records:

- Care Episodes
- Care Plans
- Complaints/Concerns
- Appointments
    - Network Spinal specific care records
    - Chiropractic care records
    - Physiotherapy care records
    - Exams
    - SOAP Notes
- Diagnoses
- Patient Conditions/Family History

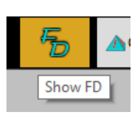
The **CR** application also includes all features from **FD**.



(screen shot from Patient File with all sections collapsed, your display order may differ depending on your settings)

Common Button Icons

You will notice the button images we use throughout the software are consistent in their purpose. For any button you would like to see a quick tip on, hold your mouse cursor over the button and a tooltip will pop up to tell you what the button is.



After a short while you will become familiar with our icons and the H^{2}D _practice system will be quite simple to navigate.

The new H²D _practice gives you many new features to create detailed SOAP notes. There are a few areas you will want to visit in OM before you start using the new adjustment panel.

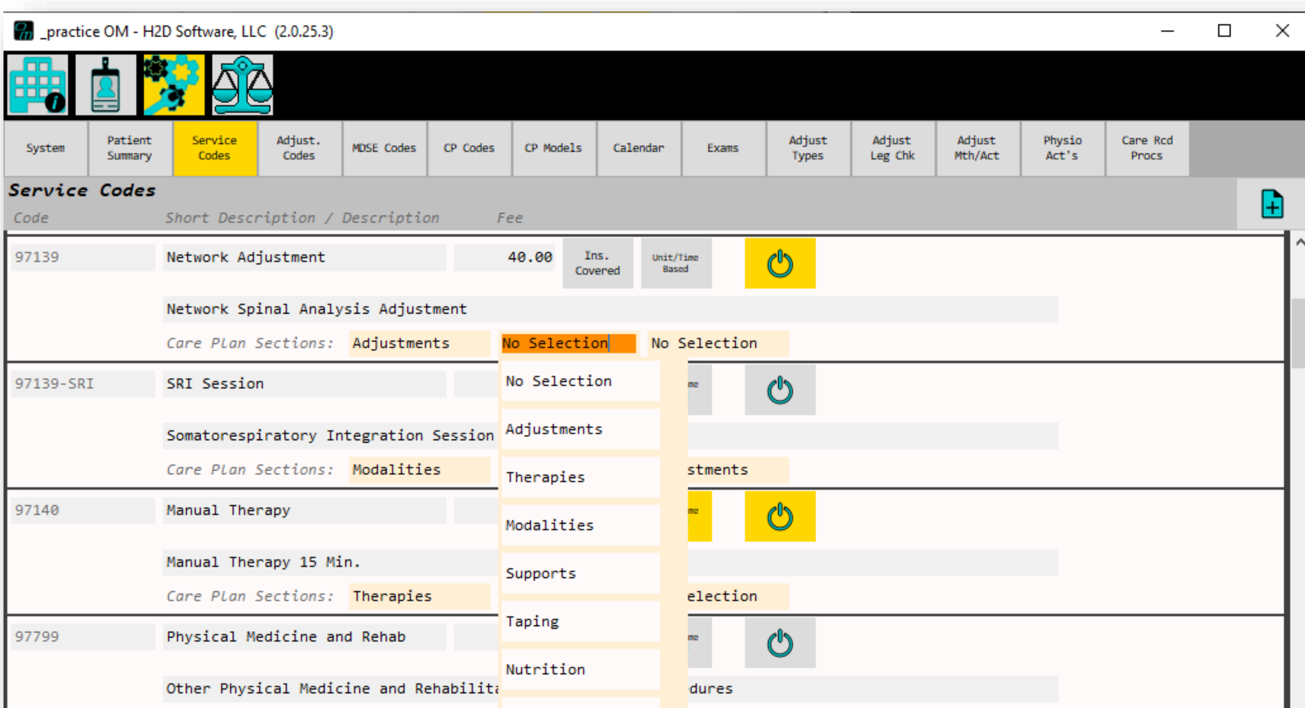
Categorizing Service Codes for Care Plan Sections

- **This step is important for your service codes to continue automatically copying previous visit codes**
- There are new care record sections in your patient's appointments.

  - Each panel can have its own group of service codes.
- Service codes need to be categorized in the OM Service Code settings to control which codes are brought forward with each section of your care records.

*****Before you continue creating your SOAP notes, you will want to assign the "Adjustments" category to whichever codes you have been using for your routine adjustment visits. If the previously used codes are not assigned as "Adjustments" they will not be automatically copied forward on the next visit.*****

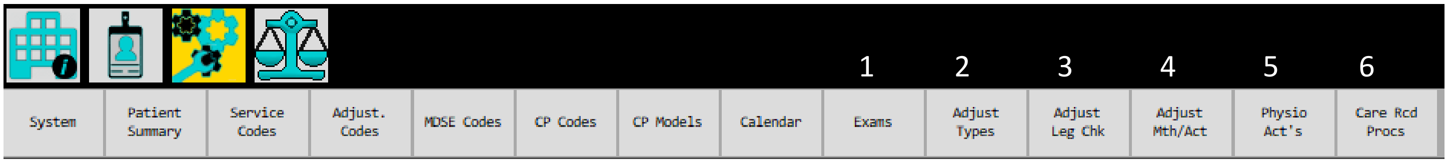
To assign your service code categories, open the service codes menu in **OM** and select the desired code type from the "Care Plan Sections:" drop down menus. Up to 3 categories can be assigned to each code. Since we have no way of knowing what codes you are using, we are not able to preassign categories for you.



Setting Your Preferences for the New Adjustment Panel

H2D _practice has a new adjustment care record loaded with customizable options.

H2D OM has many new sections in *Controls and Settings* where you can select preferences and maintain activities for the new adjustment and physiotherapy panels.



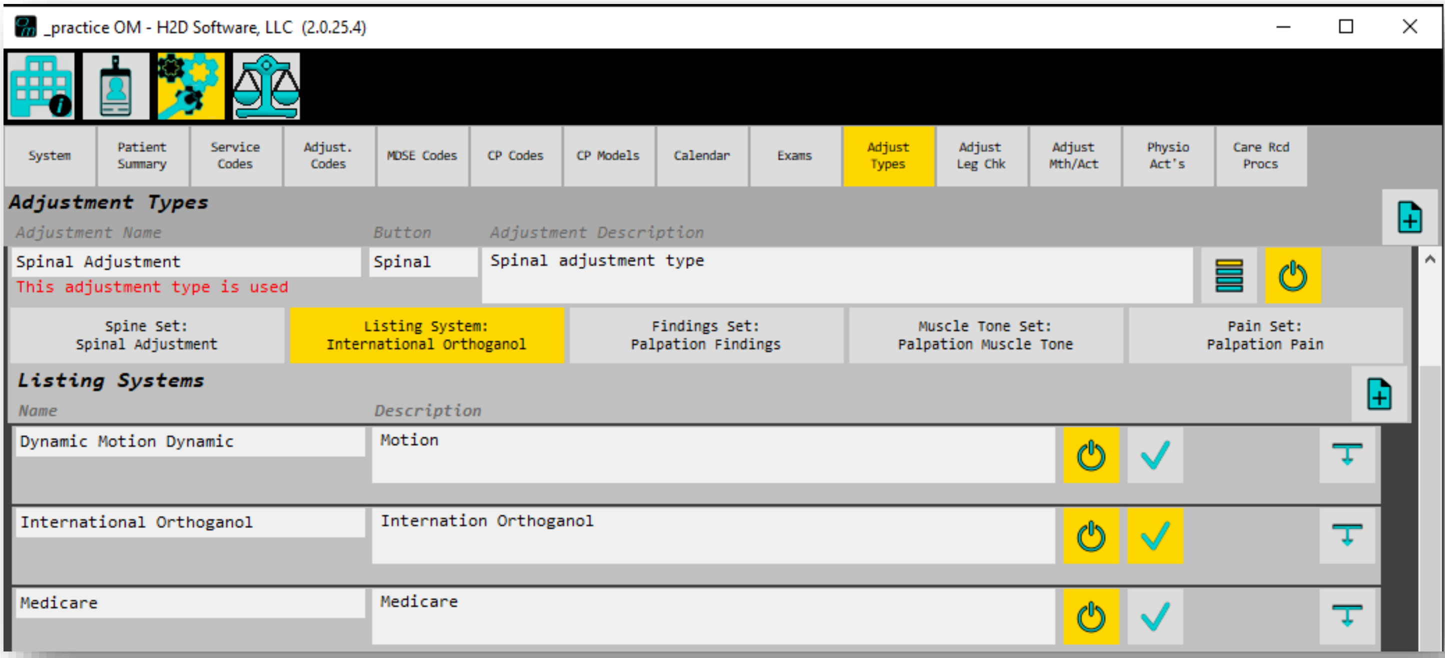
1. **Set Your Default Service Code for Your New Exams**
   This new section will have a lot more to offer later when we introduce customizable exams. For this release, you can maintain your preferred default service code to be used with new exams.
2. **Customize spinal listing settings and palpation findings**
   Tweak the numerous, predefined palpation settings or create your own. Future releases will allow for customization of the spine selection panel enabling you to set up extremity care options, or virtually anything else you can think of using the new adjustment panel for.
3. **Create/Maintain custom leg checks**
   We have many predefined leg check options in the new adjustment panel. You can also add as many of your own tests as you like.
4. **Create/Maintain Adjustment Methods and Activities**
   There are countless ways to provide a chiropractic adjustment. You can customize your own detailed adjustment notes to help you keep great track of the care you are providing. (Due to trademarks and licensing restrictions, we did not prepopulate technique specific activities.)
5. **Create/Maintain Physiotherapy and Modality Activities**
   For offices that provide ancillary and complementary services, the new *Physiotherapy* section offers a great place to set up as many types of care as you like. There is also a new type of staff member position called "C.A. +" that team members can be assigned so they will be selectable as care providers for exam and physio care records.
6. **Care Record Procedures Can Be Inactivated**
   Just because there are a ton of new appointment features, that doesn't mean you have to use them. In this menu section you can decide which appointment care records you would like to see.

Customize Palpation Findings and Create Your Own Set of Options in “Adjust Types”

The new palpation panel makes recording your standard *P.A.R.T.* findings a breeze. This panel comes with many preloaded settings, including predefined and customizable listing systems. Select your preferred listing system in the new OM “Adjust Types” menu by pressing the ✓ button next to your choice. You can change this selection at any time.

If you don’t see a listing system that fits your way of thinking and notating, you can always create your own, or modify any of the preloaded listing systems. If a palpation finding, or any other activity, has not already been used in your SOAP notes, you can make any changes you like. Any changes you make will not be seen on open care records until you refresh any open screens.

***Changes you make are immediately recorded in the database, so all changes are permanent. ***

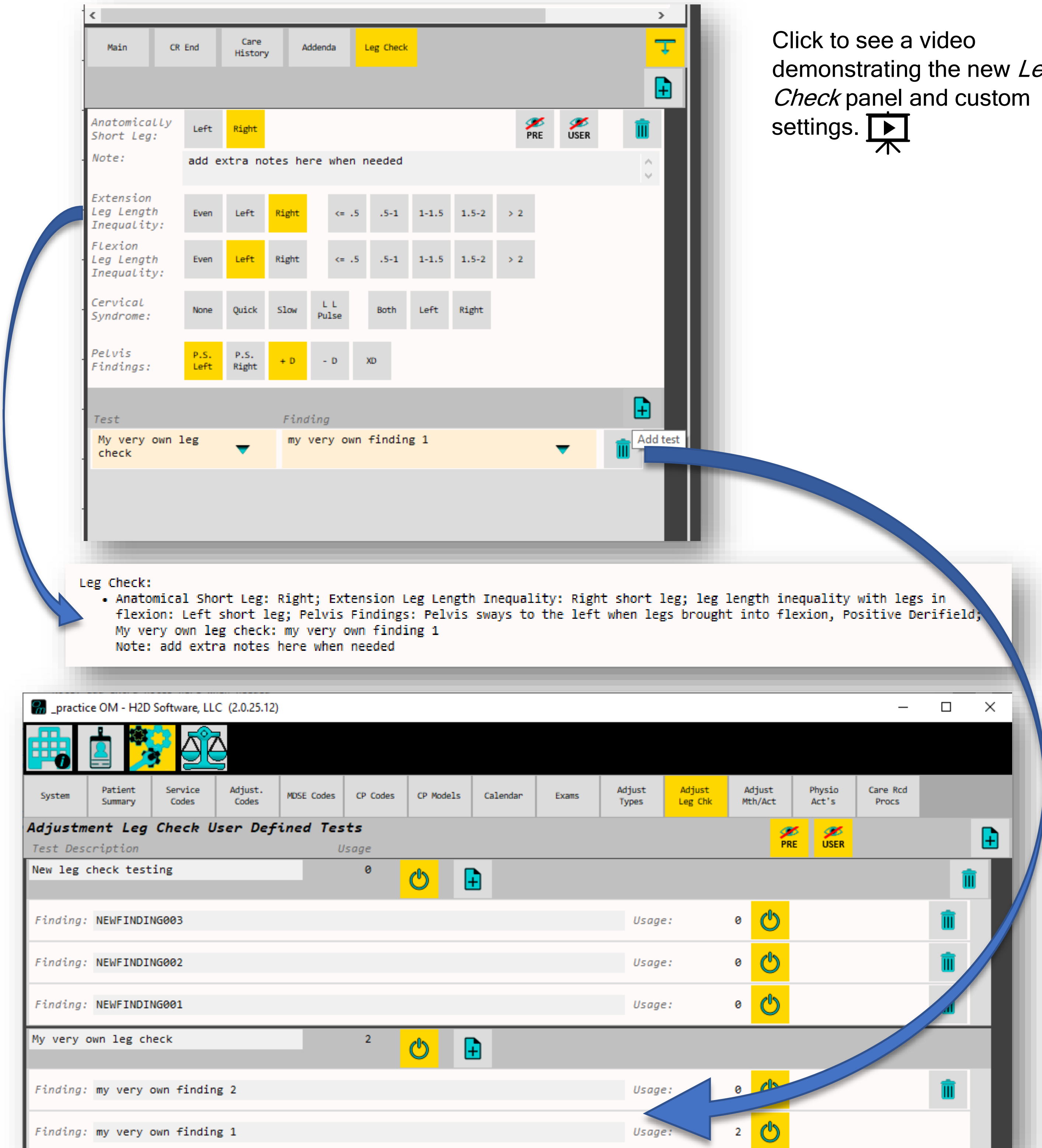


Click to see a video demonstrating use of the *Adjust Type* menu.

Create and Maintain Custom Leg Checks

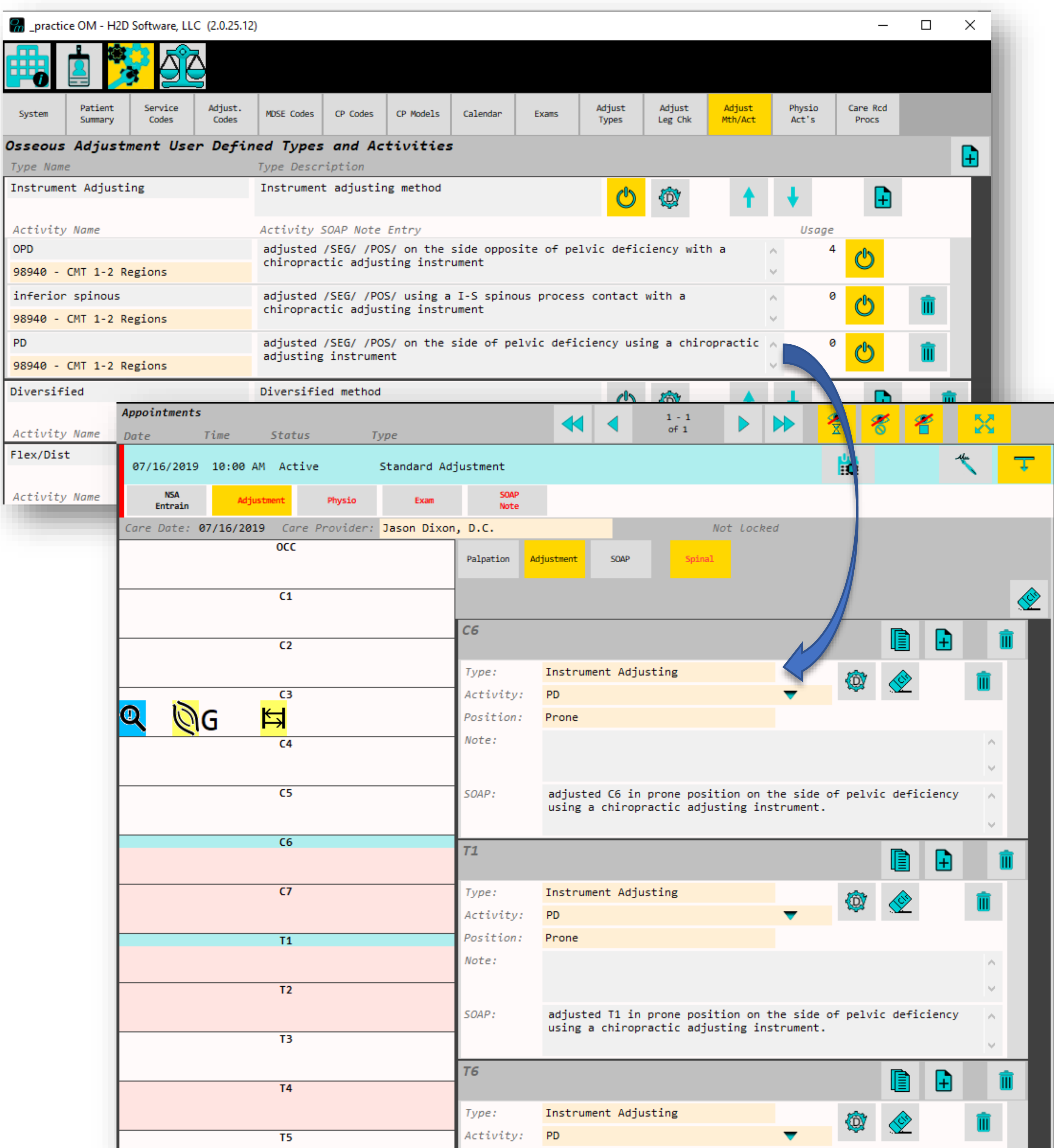
The new adjustment panel offers new pre-defined leg checks as well as the ability to create your own custom leg check tests and findings.

Click to see a video demonstrating the new *Leg Check* panel and custom settings.



Create and Maintain Custom Adjustment Notes

The new adjustment methods and activities allow you to create custom notes with as little or as much detail as you like. Spending a little time to prepare your favorite adjustment technique notes can make for a very fast, yet incredibly detailed SOAP note. Click to see how to customize your adjustment notes.

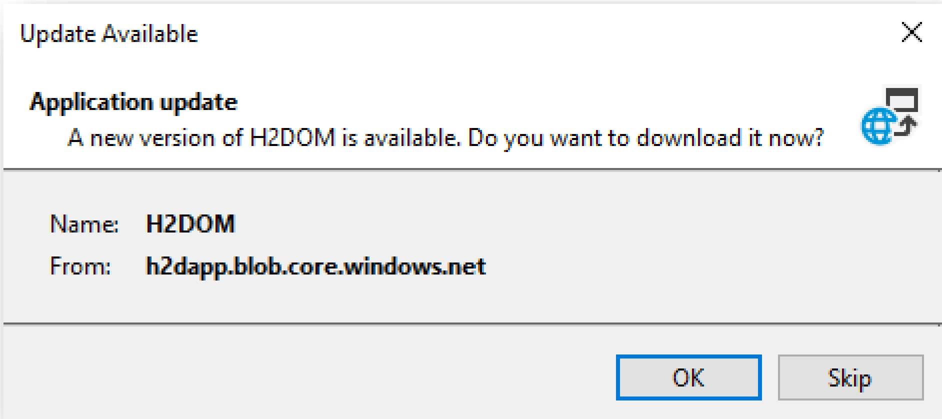


You will periodically see a prompt to update your software when you open **CR**, **FD**, **OM** while connected to the internet. We publish new releases for the software system with new features and enhancements to the software, fine tuning of software performance, and corrections of any bugs discovered.

When we add new features that will change the way you interact with the software, you will receive an e-mail notifying you of any changes you should be aware of.

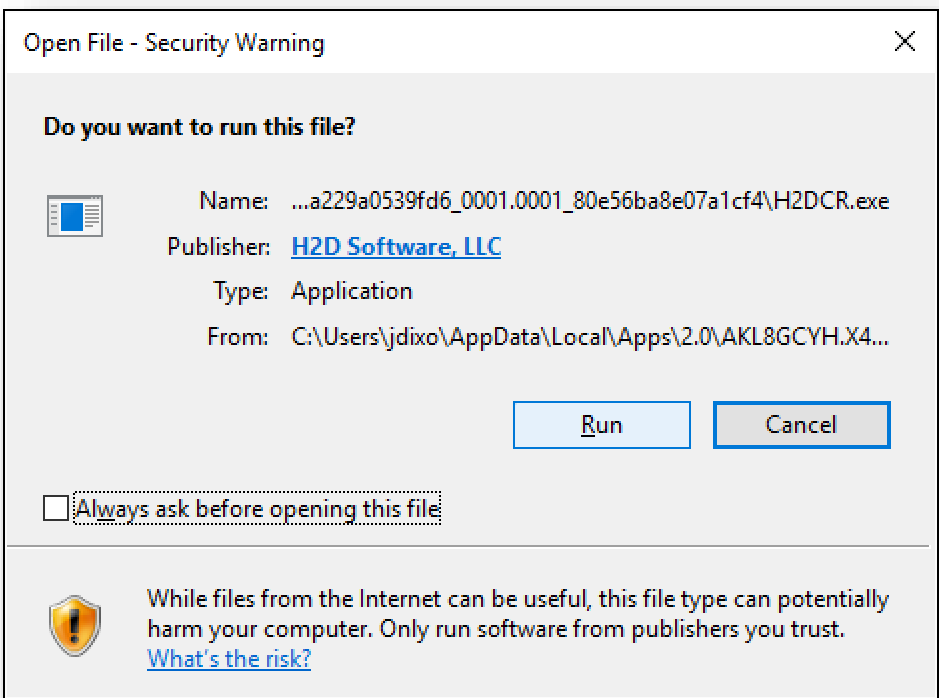
When you load the software and a new release is available, you will see this screen appear:

Press or click “OK” to receive the updates.



Due to Windows security protocols, you may see a screen pop up asking if you are sure you want to make changes to your system, or if you are sure that you want to run the file. Accept the changes and run the file to receive the updates for the H2D Software System. Example:

In this example, you would click “Run” to open the software.

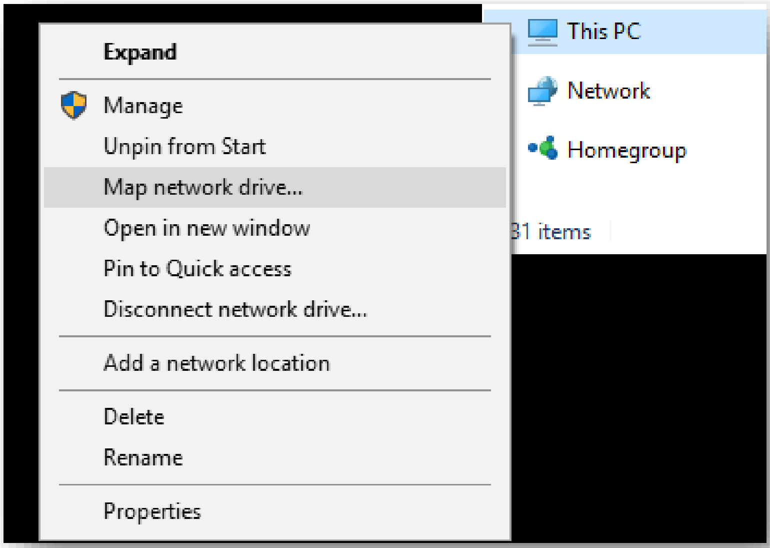


Your client computer and server must be on the same network.

Open your file explorer: click on the folder on your taskbar . 

Look for "This PC" on the left side menu.

Right click on "This PC" and select "Map Network Drive…"



Select Drive "Z:"

Type "\\SERVERNAME\h2d"

Click on "Finish"