



## SOFTWARE USERS GUIDE



**V/1.0-0126**





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## Introduction

This guide walks through how a to uses the Consultation Software from login to completing a treatment plan and documenting everything inside the HSCS CMS (Client Management System).

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### 1. Logging in

1. Open the software:• Launch the Consultation Software from your desktop, start menu, or approved access point.

2. Enter login credentials:• Username: Enter your assigned username.  
• Password: Enter your secure password.

3. Confirm successful login:• After logging in, you should see:• The Software Dashboards & Menus area.

• Access to the HSCS CMS (Client Management System).  
• Top-level items like Client Services, Consultation, Consultation Library, and ADMIN.

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## 2. Understanding Dashboard & Menus

After login, familiarize yourself with the main areas:

- Client Management System (HSCS CMS):• Client Folders
- Health & Safety (H & S) Profiles
- Services and/or Client Services

- Consultation Software core sections:• Discovery
- Assessment
- Treatment
- Consultation Library
- Reports & Analytics

- Supporting systems:• Appointment Scheduling System
- Health Review
- Physical Examination
- Treatment Plans

- Admin & close controls:• ADMIN: For system administration (user access, settings, etc.).
- Close: To exit the software safely.

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## 3. Managing clients and folders

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### 3.1 Creating or opening a client folder

1. Go to client management:
  - From the dashboard or menu, select Client Management System (CMS) or HSCS CMS.
  - Choose Client Folders.
2. Search for an existing client:
  - Search field: Enter client Name or other identifying information.
  - Results: Open the correct client folder by clicking on the record.
3. Create a new client (if not found):
  - Add new / New client: Click the relevant button to create a new client record.
  - Enter basic details:
    - Name
    - Contact information
    - Any other required fields (e.g., ID, date of birth, preferred services).
4. Save the client folder:
  - Click Save or the equivalent command before navigating away.

### 3.2 Assigning services and profiles

1. Open the client's folder.
2. Assign services:
  - Go to Services or Client Services within the client folder.
  - Select the type of service (e.g., Hair & Scalp Consultation, Treatment Plan).
3. Update H & S profiles:
  - In H & S Profiles, record any relevant health & safety considerations related to hair/scalp care.
4. Save changes before proceeding.

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## 4. Running a consultation: Discovery → Assessment → Treatment

The consultation process typically follows three stages: Discovery, Assessment, and Treatment.



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## 4.1 Discovery stage

1. Open discovery:
  - From the main menu, choose Consultation or the client's Consultation tab.
  - Select the Discovery section.
2. Identify main concerns:
  - Record client's primary concerns regarding hair loss and scalp disorders.
  - Add notes about history, duration, symptoms, and prior treatments.
3. Attach forms or documents (if available):
  - Use Links or Attachments fields to attach:
    - Intake forms
    - Photos
    - External documents
4. Save discovery notes once complete.

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## 4.2 Assessment stage

1. Open assessment:
  - Within the client's consultation, select the Assessment tab or section.
2. Complete health review:
  - Use Health Review-(M) or Health Review-(F) as appropriate.
  - Document key items such as:
    - Stress
    - Medical history
    - Thyroid
    - Diabetes
    - Nutrition
    - Pregnancy
    - Menstrual
    - Menopause
    - PCOS
3. Perform physical examinations:
  - Hair Physical Exam: Record findings related to the hair shaft, density, breakage, etc.
  - Scalp Physical Exam: Record scalp conditions (inflammation, scaling, lesions, etc.).
4. Record assessment results:
  - In Assessment Results, summarize:
    - Key findings from health review.
    - Key findings from physical and scalp exams.
    - Provisional assessment (e.g., suspected conditions, contributing factors).



5. Save the assessment when finished.

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### 4.3 Treatment stage

1. Open treatment:• From the client's consultation, select the Treatment section.
2. Review requests and needs:• In Treatment Requests, review any listed Requests and Category entries.
  - Common categories might include:• Hair treatments
  - Scalp treatments
  - Follow-up or maintenance care
3. Create or update a treatment plan:• Use Treatment Plans to:• Define proposed treatments.
  - Set frequency and duration.
  - Note any product recommendations or procedures.
4. Document hair and scalp treatment requests:• Hair Treatment Requests: Detail specific hair-related interventions or services.
  - Scalp Treatment Requests: Detail specific scalp-focused treatments.
5. Save the treatment plan and confirm it is linked to the client's record.

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### 5. Using the consultation library

The Consultation Library is where you manage and reference stored consultation content (Discovery, Assessment, Treatment materials, templates, and requests).

1. From the main menu, select Consultation Library.
2. You should see:• Columns like Requests, Date, Category, Subject.
  - Tabs or fields for Discovery, Assessment, Treatment.
  - Areas for Links and Attachments.

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### 5.2 Searching and filtering

1. Search:• Use the Search field to find items by keyword (e.g., subject, category, name).
2. Filter:• Adjust No Filter to another filter option (if available) to refine results (e.g., by Category or Date).



3. Select a record:• Click on the appropriate record (e.g., Record: 1 of 1) to open details.

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## 5.3 Working with attachments and templates

1. Links and Attachments:• Open any Links or Attachments associated with:• Health Review-(M) / Health Review-(F)

- Hair Physical Exam
- Scalp Physical Exam
- Hair Treatment Requests
- Scalp Treatment Requests
- Notes

2. Using stored templates:• Reuse standardized health review or exam templates for future clients to keep documentation consistent.

3. Update and save:• If you modify any standardized content, save it according to your organization's SOPs (e.g., as a new template vs. overwriting an existing one).

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## 6. Reports, scheduling, and closing the session

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### 6.1 Appointment scheduling

1. Open appointment scheduling:• From the main menu or client record, open the Appointment Scheduling System.

2. Set or update appointments:• Choose the client.
- Select date and time.
  - Assign the correct service (Discovery, Assessment, Follow-up, Treatment).

3. Confirm and save the appointment.

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### 6.2 Reports and analytics

1. Open reporting:• From the dashboard, select Reports & Analytics.

2. Choose report type:• Examples might include:• Number of consultations by category.

- Treatment types used.
- Client follow-up status.



3. Generate and review the report.
4. Export or print reports according to your workflow (e.g., for internal review or KPI tracking).

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### **6.3 Logging out and closing**

1. Save all work:
  - Ensure all client records, consultations, and treatment plans are saved.
2. Use the admin/exit options:
  - If required, go to ADMIN for any final administrative tasks.
  - Click Close or Logout to end your session safely.
3. Confirm closure if prompted.