SOFTWARE USERS GUIDE

V/1.0-0126

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Overview of the system

This Hair Restoration Software is designed to manage medical procedures that enhance the client's hair. It centralizes:

• Client Management System (CMS)
• Appointment Scheduling System
• Preop, Procedure, and Post-Service workflows
• Par Scale / inventory-related tracking (if enabled)
• Reports & Analytics
• Hair Restoration Services Form & Library

You'll see references to HSHRS, Client Intake, Hair Restoration Service Form, and Hair Restoration Library throughout the guide.

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1. Logging in and accessing the home screen

1. Launch the application.• Open the Hair Restoration Software from your desktop, start menu, or web link (depending on your deployment).

2. Enter login credentials.• Username: Your assigned user ID.
• Password: Your secure password.
• Select Login (or equivalent button).

3. Arrive at the HSHRS home/CMS screen.• You should see the main header (for example: HSHRS CMS) and options such as:• Home
• Client Intake
• Client Intake Reports
• Hair Restoration Services
• Hair Restoration Library
• Close (to exit the software)

4. Log out / exit when finished.• Select Close from the main menu or top navigation to safely exit the application.

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2. Understanding the main dashboard and menus

On the primary dashboard you will typically see:

• Top or side navigation menu with entries like:• Home: Returns you to the main landing screen.
• Client Intake: Accesses new or existing client records.
• Reports / Client Intake Reports: Runs standard reports.
• Hair Restoration Services: Opens the service/procedure management screen.
• Hair Restoration Library: Opens the knowledge / protocol library.
• Close: Closes the application.

• Key modules called out in the interface:• Software Dashboards & Menus
• Client Management System (CMS)
• Appointment Scheduling
• Preop, Procedures and Post Services
• Par Scale
• Reports & Analytics

Use the menu to move between modules. You can always return to Home if you're unsure where you are.

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3. Managing clients via the Client Management System (CMS)

3.1 Opening the client intake / CMS

1. From the main menu, select Client Intake or HSHRS CMS.
2. The Client Intake form will open, showing either:• A blank form (for a new client), or
• A record navigator / search bar (for existing clients).

3.2 Creating a new client record

1. Open Client Intake.
2. Start a new record.• Click New (or the new record button in the record navigator at the bottom, usually a star or rightmost icon).

3. Enter client details, such as:• Name
• Hair & Scalp details / concerns
• Relevant medical history

• Contact information
• Referring provider or location (e.g., LAway & Koppel if applicable)

4. Save the record.• Click Save (or move to another record if autosave is configured).

3.3 Viewing and editing an existing client

1. Open Client Intake.
2. Search for the client.• Use the Search bar (often at the bottom or top of the form).
• Type part of the client's name or ID, then press Enter or click Search.

3. Navigate through records.• Use the record navigation controls (e.g., First, Previous, Next, Last) to locate the correct client.

4. Edit details.• Update fields as needed (contact info, hair/scalp data, notes).
• Click Save once changes are complete.

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4. Scheduling and tracking procedures (Preop, Procedures, Post-OP)

(This section assumes your deployment links Appointment Scheduling & Procedure records within the CMS or Hair Restoration Services form.)

4.1 Creating a new procedure record for a client

1. Locate the client.• From Client Intake, find the client record as described above.

2. Open the Hair Restoration Services form.• From the main menu, select Hair Restoration Services (or a Services / Procedures button on the client form).

3. Start a new procedure entry.• Click New record within the Hair Restoration Services screen.

4. Populate key fields. Common fields you may see:• Name?: Client name or procedure name.
• Date: Procedure date.
• Category:• Surgical or Nonsurgical (select the appropriate option).

• Status: Current status (e.g., scheduled, completed, canceled).

• Procedure: The specific procedure name (e.g., FUE, PRP, etc.).
• Client Care Package: Package or level of service assigned.
• Treatment[s]: Individual treatments included in this procedure.

5. Define the phase of care.• Use checkboxes or dropdowns to indicate:• PRE-OP
• Post-OP
• Care Instructions
• Treatment Kit (if a kit is provided)

6. Attach supporting material.• Use fields for Images, Attachments, Notes, Links, and Instruction to store:• Pre-op / post-op images
• PDF consent forms
• Links to protocols
• Free-text notes on client response and recommendations

7. Save the procedure record.• Click Save to store the new entry in the database.

4.2 Updating procedure status and notes

1. Open Hair Restoration Services.
2. Search for the procedure.• Use the Search box at the bottom or top of the services screen.
• Filter by Name, Date, Category, or Status as needed.

3. Update fields.• Adjust Status (e.g., from scheduled to completed).
• Add Notes (intra-op, post-op, complications, follow-up).
• Add or update Images, Links, or Attachments.

4. Save changes.

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5. Using the Hair Restoration Library

The Hair Restoration Library is designed as a knowledge and content repository supporting the service forms.

5.1 Opening the library

1. From the main menu, select Hair Restoration Library.
2. The Hair Restoration Library screen will open, typically listing:• Subject
• Category (e.g., Pre-OP, Post-OP, Care Instructions, Treatment Kit)
• Links

• Attachments
• Instruction text or descriptions.

5.2 Finding relevant guidance or protocols

1. Use the filters.• Check or uncheck category options such as:• PRE-OP
• Post-OP
• Care Instructions
• Treatment Kit

• Ensure No Filter is unchecked if you want to apply specific category filters.

2. Search by keyword.• Use the Search box to search by:• Subject (e.g., “PRP post-op care”)
• Keyword in instructions.

3. Navigate records.• Use the record navigation controls (e.g., “Record: 1 of 1”) to move between entries if multiple matches exist.

5.3 Using library items in client care

1. Open the desired library record.• Select the entry that matches the procedure or phase (e.g., “Post-OP – FUE Care Instructions”).

2. Review the content.• Read the Instruction field thoroughly.
• Review Attachments (forms, handouts) and Links (online resources or internal URLs).

3. Apply to client case.• Use the content to:• Educate the client.
• Print or share instructions (if your system supports printing/export).
• Document in the Notes field of the client’s Hair Restoration Services record that standard or customized instructions were given.

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6. Searching, filters, and record navigation

Across the Hair Restoration Services and Hair Restoration Library screens you will see common tools:

• Search field:• Type part of a Name, Subject, or Keyword, then press Enter or click Search.

• Filters / Category checkboxes:• Turn on or off PRE-OP, Post-OP, Care Instructions, Treatment Kit, etc.
• Use No Filter to show all records.

• Record bar (e.g., “Record: 1 of 1”):• Use First, Previous, Next, and Last buttons to move between records.

Use these tools to quickly move between procedures, knowledge records, and clients.

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7. Reports and analytics (high-level)

From the main dashboard, you will see references to Client Intake Reports and Reports & Analytics.

7.1 Opening reports

1. From the main menu, select Client Intake Reports or Reports & Analytics (depending on what appears in your build).
2. A report selection screen will appear (e.g., list of standard reports).

7.2 Running a basic report

1. Choose the desired report type:• Client Intake Report
• Procedure Summary by Date
• Surgical vs Nonsurgical Volume (if available)

2. Set filters (date range, location, provider, category).
3. Click Run, View, or Open.
4. Use on-screen controls to:• Print the report
• Export (PDF, Excel, etc., if supported)
• Close the report and return to the main menu

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8. Closing the software

1. Save your work.• Ensure any open forms (Client Intake, Services, Library) have been saved.

2. Return to the main screen.• Click Home or close open windows until you see the primary navigation.

3. Exit the application.• Click Close in the top navigation or window controls.
