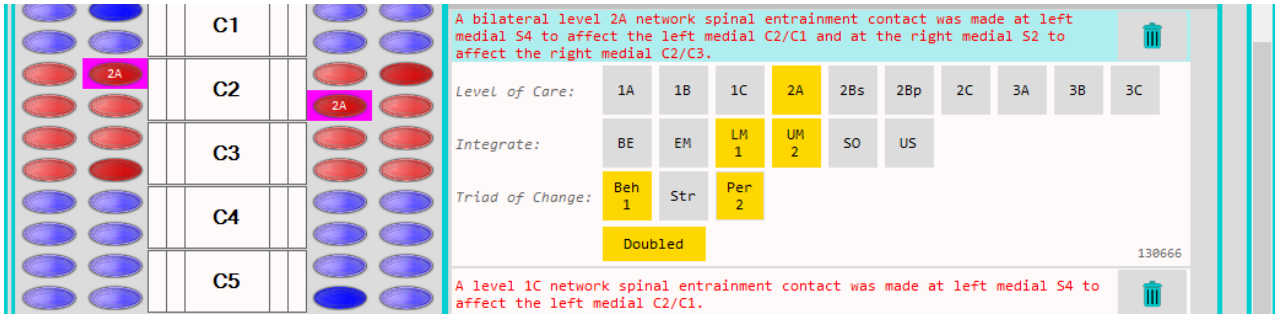
Recording Entrainment Contacts

- Select a gateway button
- Press the new entrainment contact button
- Select the level of care for your entrainment contact
- Select the integration strategies used
    - You may record multiple integration strategies
    - Multiple button selections are recorded in sequence
- Select the triad of change strategy
    - Multiple button selections are recorded in sequence
- Record relationships of this gateway contact to other gateways by pressing Link, Double, or Affect
    - Link – This will record the contact as a simultaneous contact such as in bilateral direct entrainment contacts.
        - Press Link, then press the next gateway button
        - You will now see both gateway buttons highlighted in gold
        - All entrainment contact details are now recorded on both gateway buttons at the same time.
    - Double – This will record the contact as a bilateral phase one contact or a double ended phase one contact.
        - Only the green, Phase One, gateway buttons give this option
        - Press Double, then press the other gateway buttons in this sequence:
            - Gateway affected by the 1st Phase One gateway
            - 2nd Phase One gateway button
            - Gateway affected by the 2nd Phase One gateway
    - Affect – This will record a single Phase One gateway contact and show the relationship of the gateway this contact is affecting.
        - Only the green, Phase One, gateway buttons give this option
        - Press Affect, then press the gateway button representing the gateway you are affecting with the Phase One contact.
- When recording a contact, you may select any option in any order. The Double contact gateway button selection is the only sequence that needs to be specific to properly record what you are doing.



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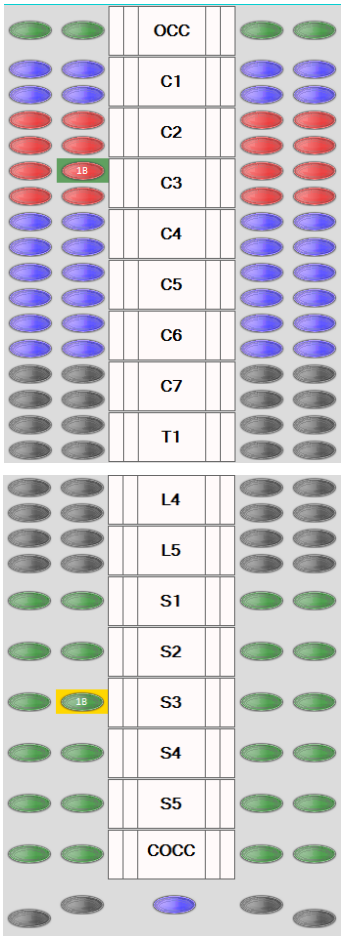
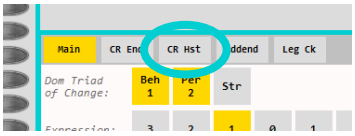
The Gateway Buttons



- Gateway buttons are grouped by colors into the different phases.
- When a gateway is selected it will have a gold background.
- Different colored backgrounds indicate different relationships between gateway buttons when recording a contact.
  - When gateways are linked with the "Link" button, both gateway buttons will have a gold background.
  - After selecting a Phase One gateway button, press "Affect" to indicate which gateway is being affected by the Phase One contact. Affected gateways will have a green background.
  - Bilateral or double ended Phase One contacts can be recorded by pressing the "Double" button. Gateway buttons linked with a "Double" contact will have a magenta background.
- When a contact has been recorded, the highest level contact for that particular visit is displayed on the gateway button(s).
- If you have recorded an entrainment contact on a previous visit, the gateway button will appear darker to indicate there is a history for that gateway button in the database.
  - When you press a gateway button that has entrainment contact history, every previous contact recorded will appear on the right center panel.
  - If you press a darker colored gateway button and there is no history displayed, this would indicate that the gateway was affected by a previous contact but there is no direct contact history at that gateway.
  - To see detailed history for previous visits, press the CR Hx button on the bottom right panel.



Gateway button history:

- The panel above displays contacts from previous visits.
  - The first section displays level of care
  - The second section shows the integration strategies.
    - BE – Bioenergetic, EM – Emotional, LM – Lower Mental, UM- Upper Mental, SO – Soul, and US – Universal Spirit
  - The third section shows the triad of change strategies.
    - Beh – Behavior, Str – Structure, Per – Perception
  - The last set of abbreviations is for the gateway that was affected by or linked to the contact
    - Ex: R M C2/C3 = Right Medial C2/C3 gateway, L L C4/C5 = Left Lateral C4/C5 gateway

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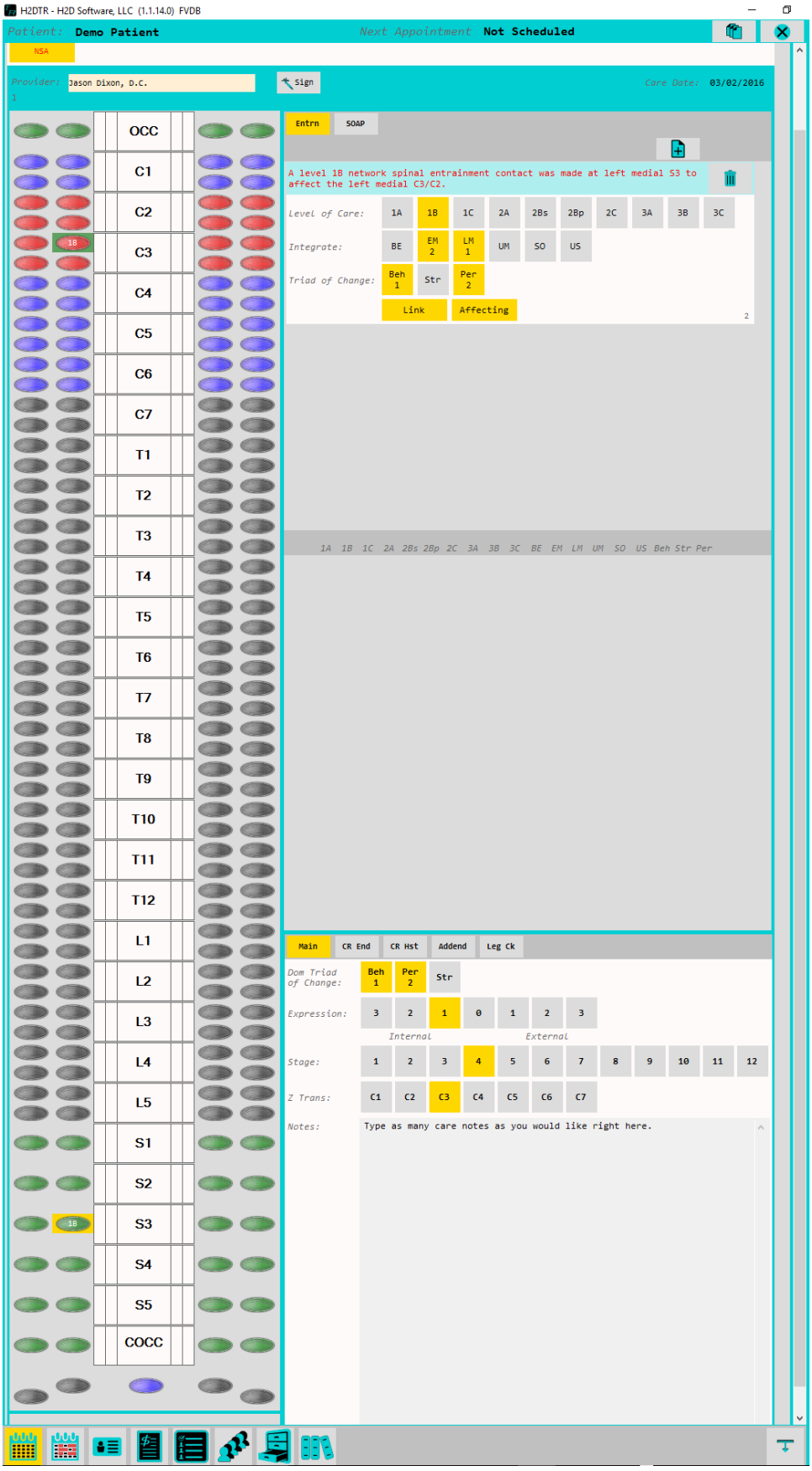
Getting to know the NSA Screen:



The panel on the top right is where you record your entrainment contacts.

After selecting a gateway button on the left panel, press the new contact button.

Record contact details and indicate gateway relationships with a few quick button presses.

The integrate and triad of change buttons record the order in which they are selected. Press any of the buttons a second time to turn them off.

If you selected the wrong gateway button, simply press the delete button to clear out any mistakes.

In this example, there is no gateway history shown. The details from any contact made at a particular gateway will appear in the right center panel when a gateway is selected.

The bottom right section is the Main Care tab where you can select the Dominant Triad of Change (T.O.C.), Internal – External orientation, current stage of healing, current Z-Translation, and add any additional care notes.

Dominant T.O.C. and Internal – External selections are carried forward to each new appointment.

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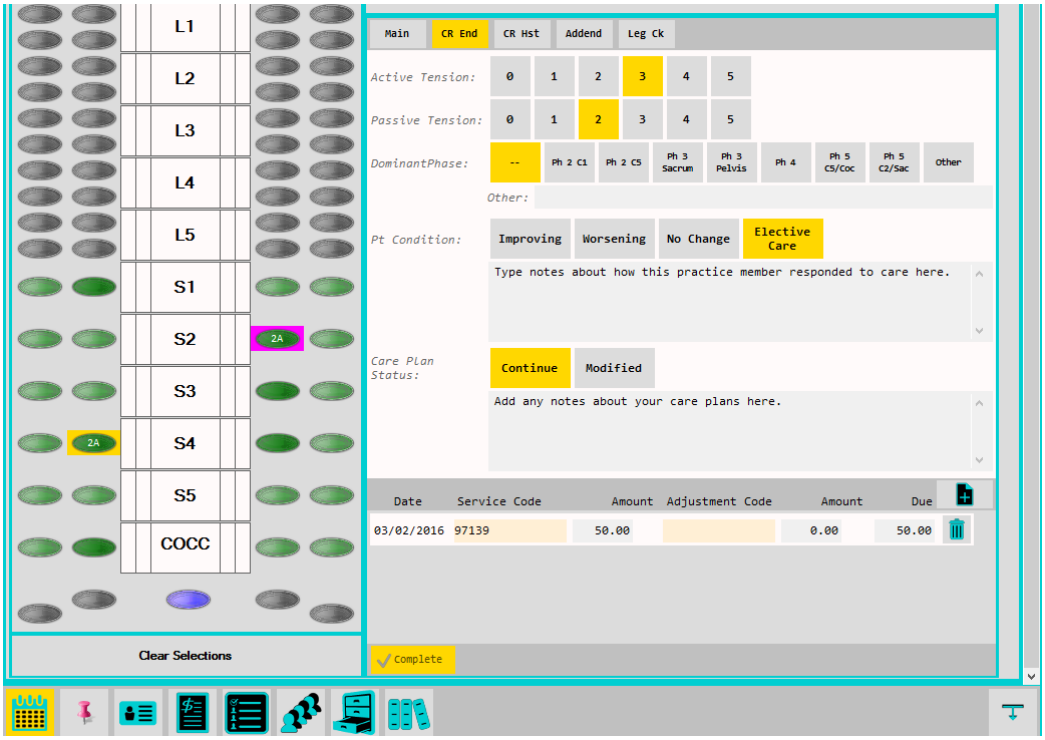
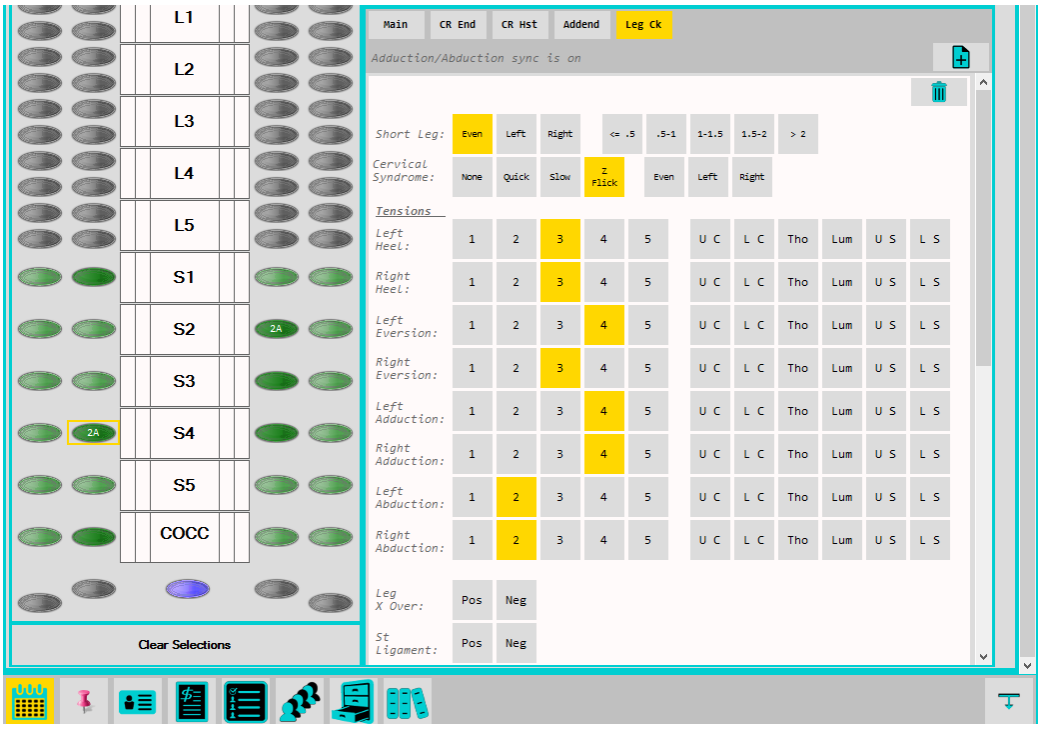


The Care End Tab is where you record the practice member's response to care, the dominant phase of spinal cord tension that was presenting on that day, comments about conditions and care plans.

The service codes that appear on this screen will automatically be added to your practice member's accounting ledger once this tab is opened.

You can make changes to service charges here or in the accounting screen.



The Leg Check panel is where you record the neural control parameters from your leg checks.

The button will add a new leg check. You can add as many leg checks as you want and make any changes you need to each leg check.

The 1st and last leg checks are included in the SOAP notes.

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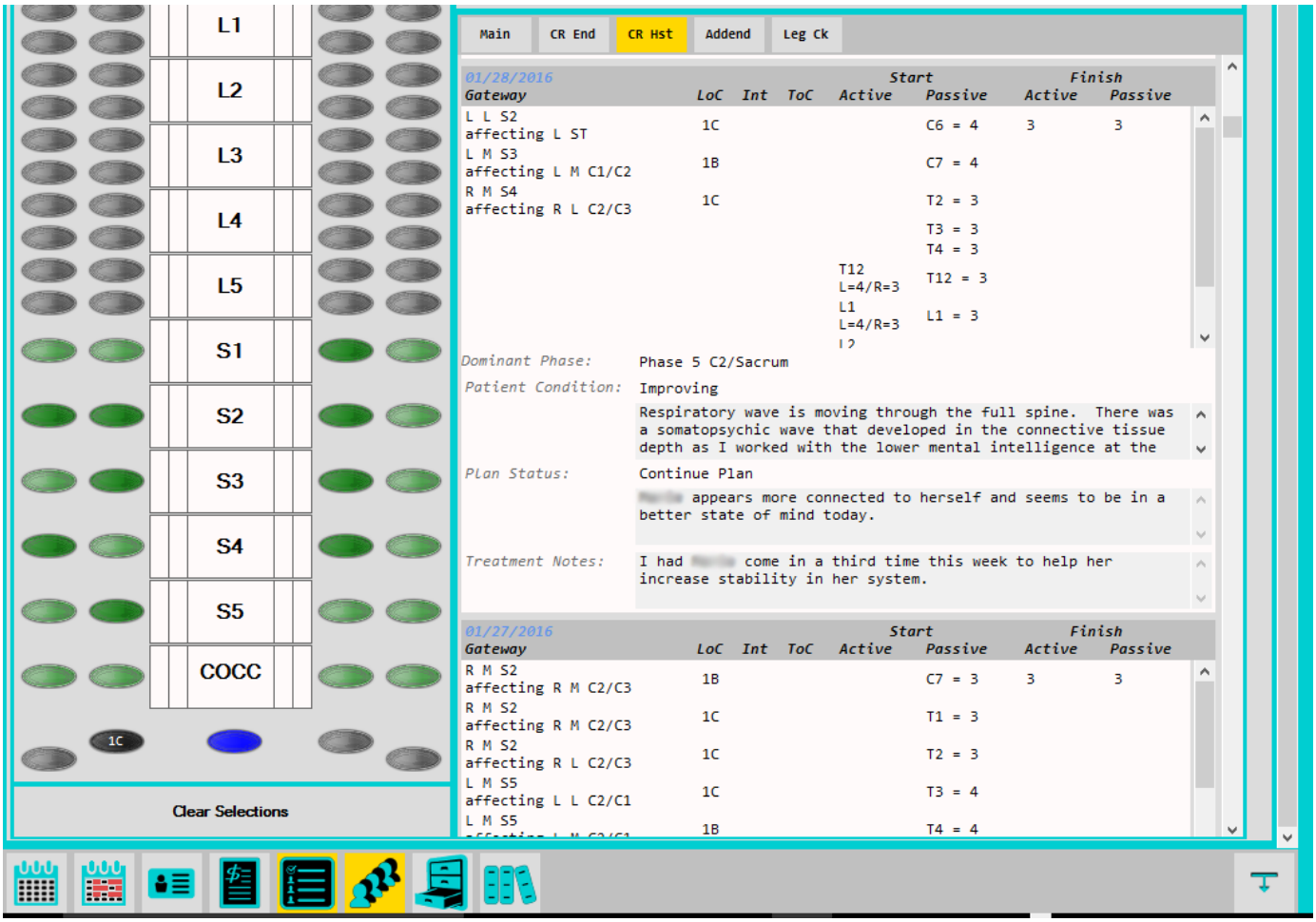
The Care History Screen



This tab helps you to quickly review previous visits without needing to load each previous appointment.

Gateway contacts are displayed in an abbreviated form. In this example, there were three level one contacts made on 01/28/2016.

- Left lateral S2 gateway was contacted, affecting the left sacrotuberous ligament gateway
- Left medial S3 gateway was contacted, affecting the left medial C1/C2 gateway
- Right medial S4 gateway was contaced, affecting the right lateral C2/C3 gateway.

There were no integration or triad of change strategies recorded on this visit. The active and passive tension that was recorded during the visit is displayed in order from occiput to coccyx.

We are in the process of redesigning the active and passive tension screens which will lead some changes to this screen's formatting. Watch for updated training publications to keep you informed of the new features as we add them.

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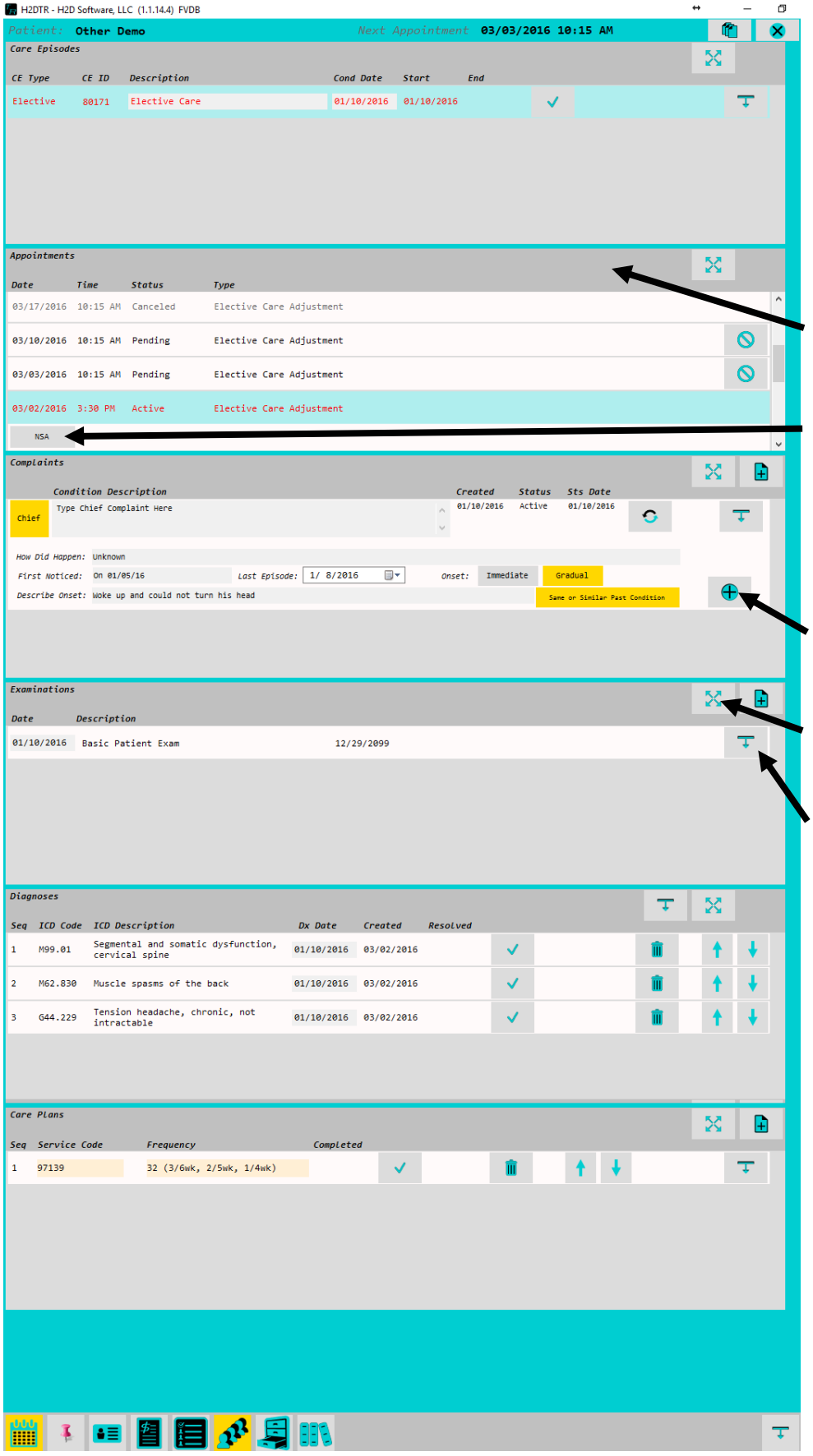
The Patient/Practice Member Summary Screen



Care episodes are created when creating appointments on the calendar. (See calendar for details)

Our default descriptions are “Elective Care” and “Restorative Care” plans. Feel free to create your own description which will appear on the appointment calendar.

Clicking on a dark grey header will expand or collapse a section.

Click or press the NSA button to open the NSA Care screen.

The **Complaints** section is for recording details of complaints or presenting issues. Add new complaint record details by pressing the + button.

Click the screen expansion button to have any section fill the whole screen.
Click the object expansion button to open an object for more options and details.

The **Diagnoses** screen is prepopulated with many commonly used ICD 10 diagnosis codes. We have not included any mechanism of injury codes, but they are easy for you to add them if you need them.

The **Care Plans** section is where you select care plans, assign service codes to diagnoses, and create care plan goals. You will need to assign a care plan to your practice member before you can utilize **block scheduling**. Create custom care plans in the H2DOM application.

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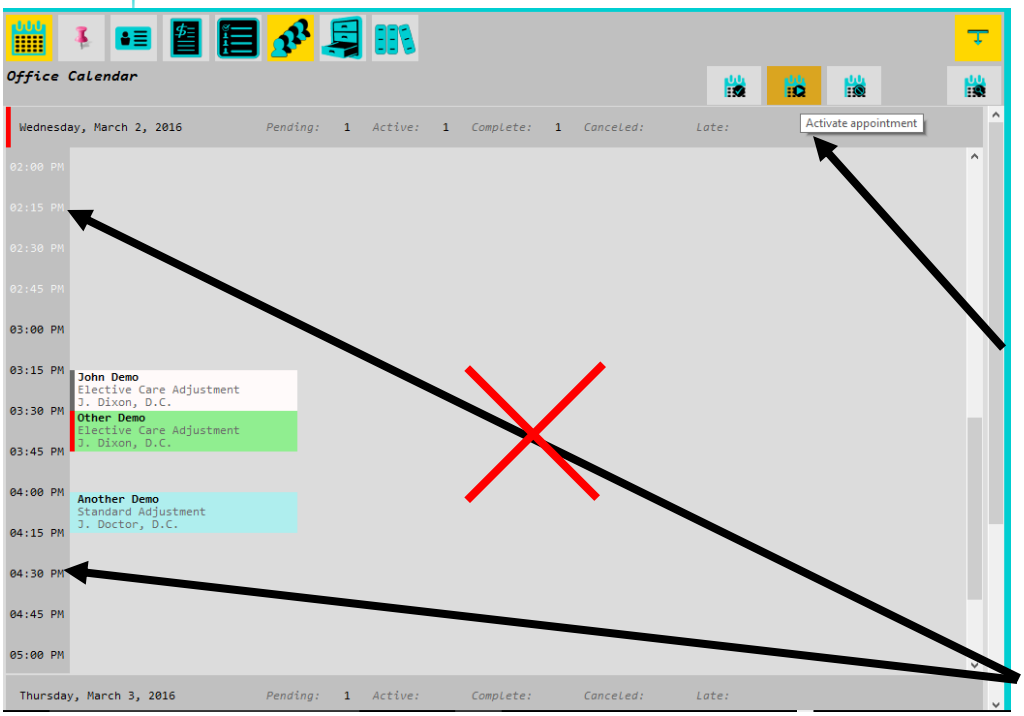
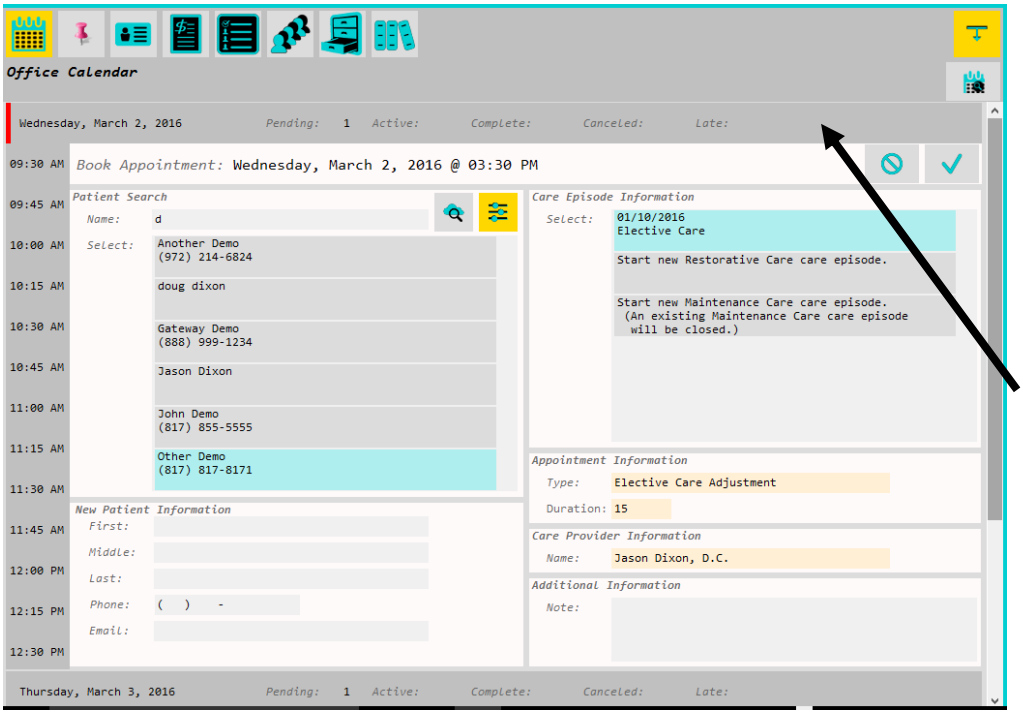


The Calendar is where you will create appointments. You must have an appointment scheduled in order to use the NSA Care screen.

When appointments are scheduled, press on a practice member's name to select it and then press either check in or activate.
Activating an appointment will take you directly to their Practice Member Summary Screen.



To schedule an appointment, press the time of day you want to schedule. The office is considered closed where the times are in white. These times are locked from appointments to prevent from accidentally scheduling while closed.

You can change your calendar settings in H2DOM.

Press or click on the header for the day of the week to expand or collapse that day's schedule.

You may schedule as many people in a single time slot as you like.

After pressing a time slot, the Book Appointment screen opens. Enter a practice member's first name, last name, or the first letter or part of a name to pull up the intended person. After you have scheduled an appointment before, the next appointment will be prepopulated for quick scheduling.

Select an existing care episode or create a new one, select the appointment type, change the duration if you'd like, and select the care provider for that visit. Press the check mark to confirm the appointment.

If you are scheduling for a new patient/practice member, you can enter their information on the bottom left.

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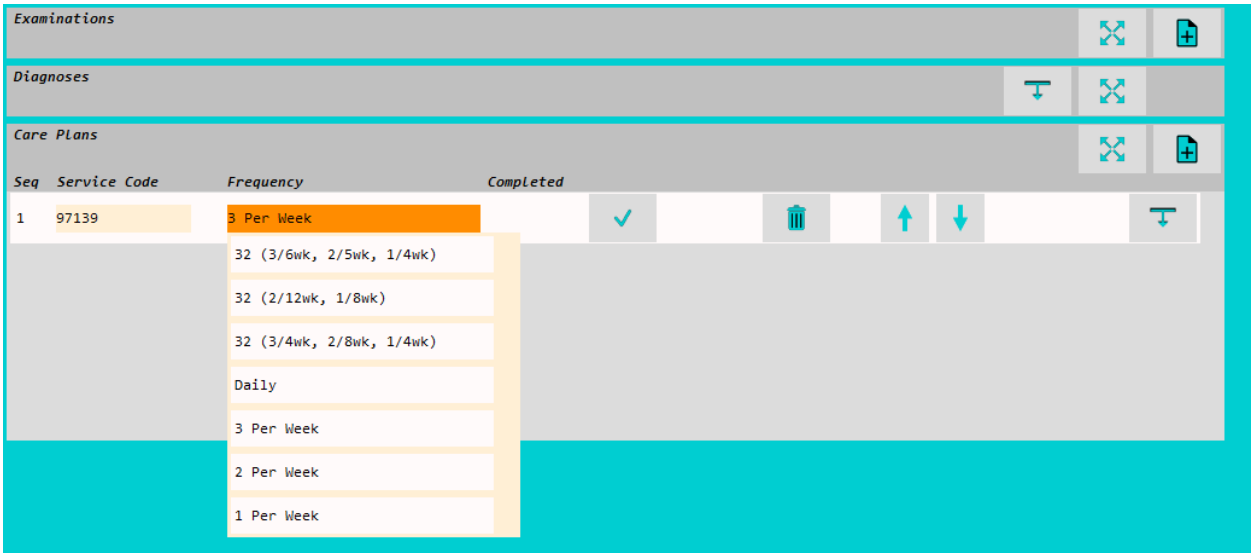
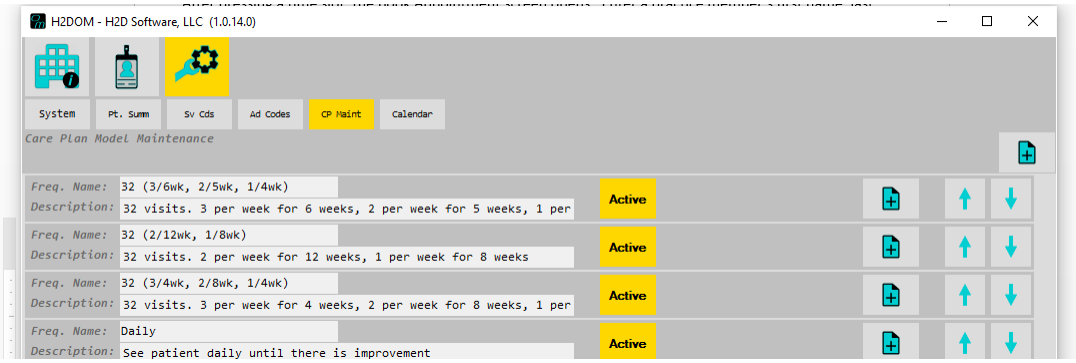
In order to use block scheduling, you must have a care plan assigned in the patient/practice member summary screen.



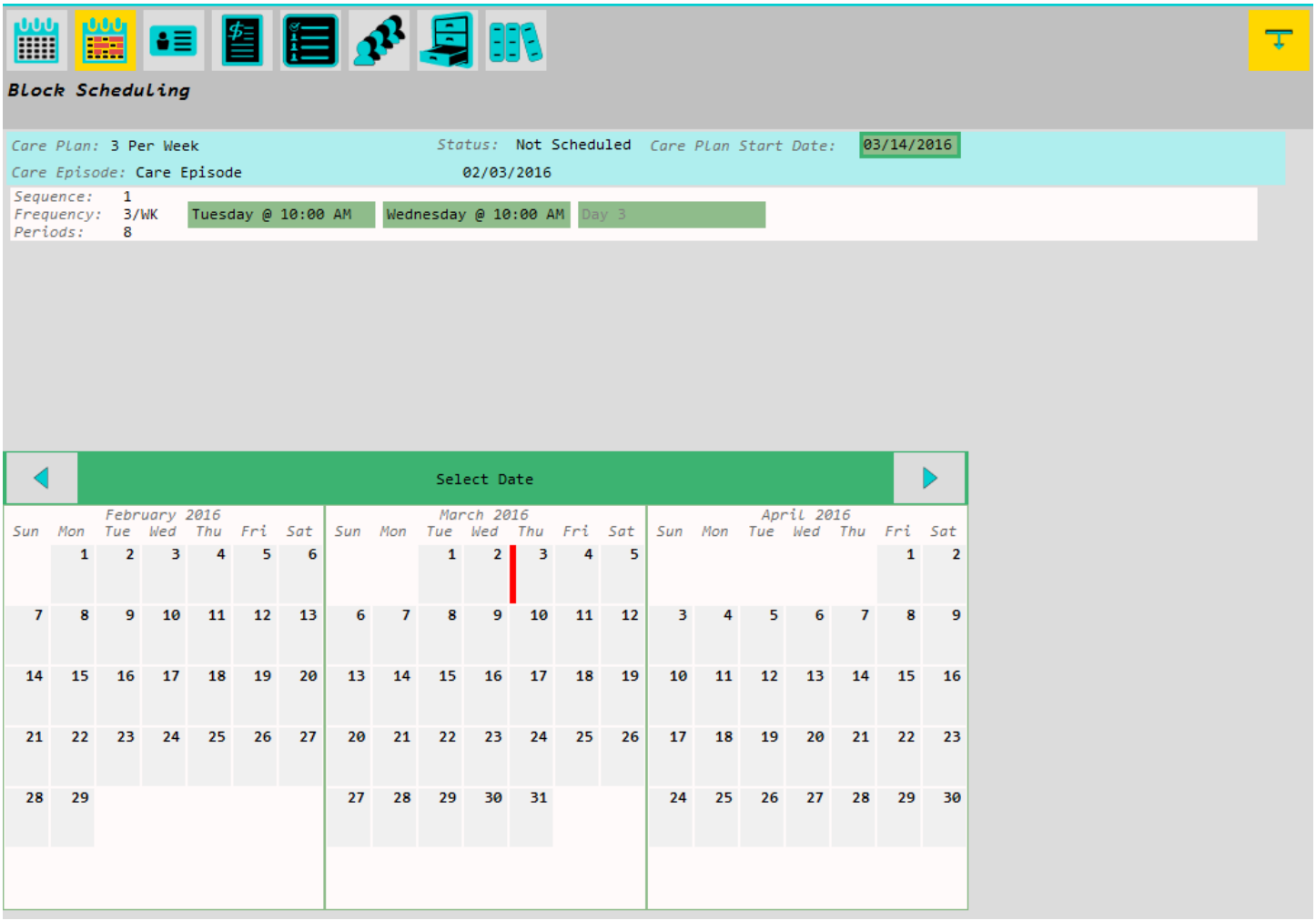
Use any of the care plans that we have created or create your own in the H2DOM application.

To create your own care plans, open H2DOM and click on the codes and settings button.

Click on “CP Maint” and click the add a new care plan button.



Block Scheduling



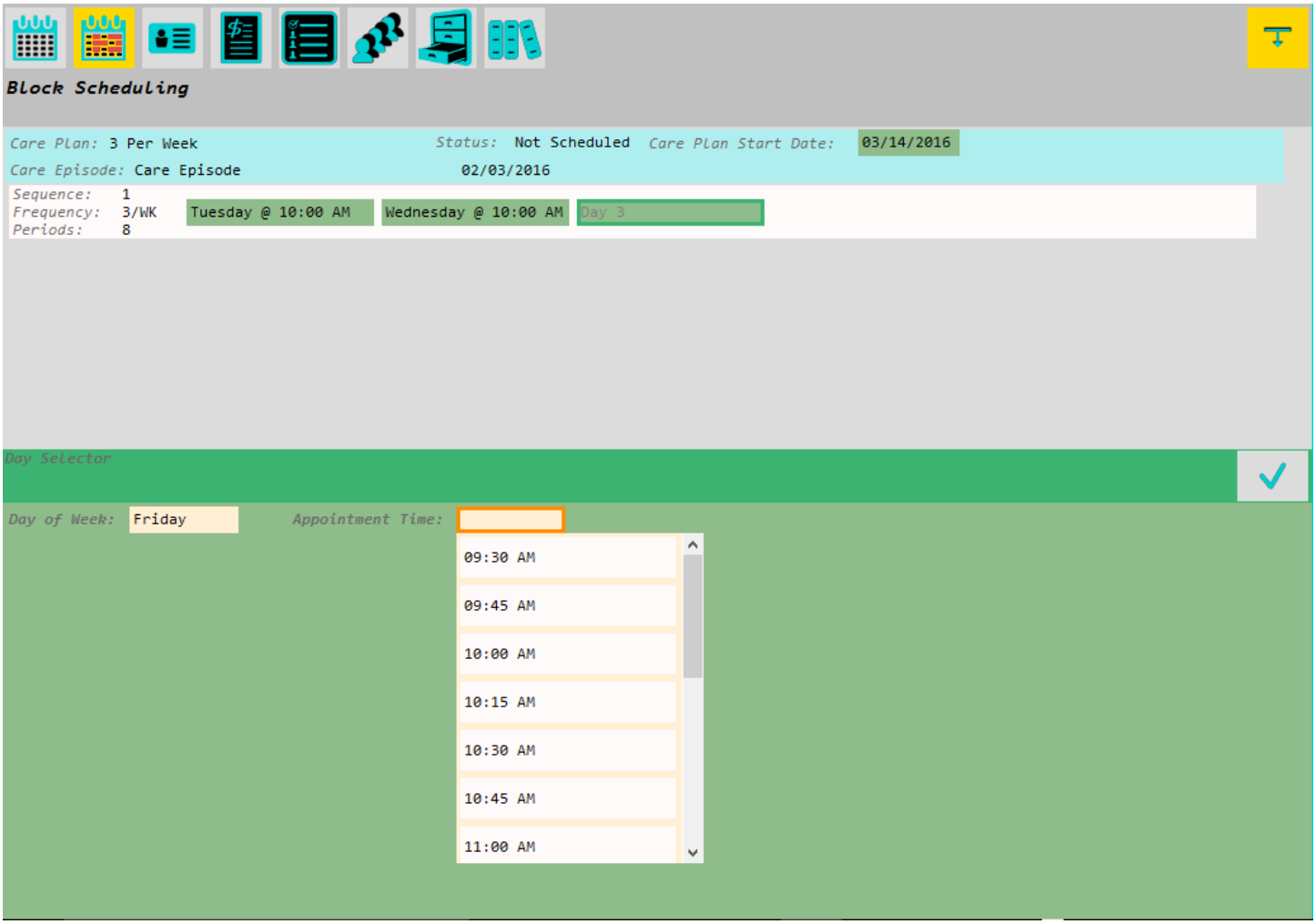
The green boxes can be pressed to set up the type of weekly appointment schedule that you would like to repeat. Care plans with different frequencies over multiple weeks will offer a more complex schedule that can be created and booked all at once.

Pressing the “Care Plan Start Date” opens the 3 month calendar as shown above. Select the date you would like this block scheduling to begin.

You will then need to select the day of the week and time for the indicated frequency of your care plan.

Block Scheduling continues on the next page.

Block Scheduling

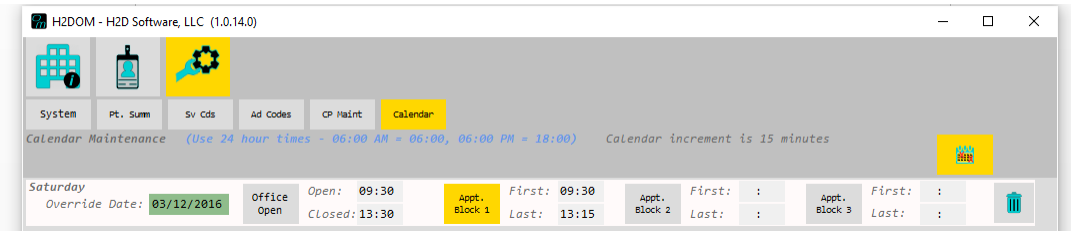


Pressing the “Day 1,” Day 2,” or “Day 3” boxes opens the day and time selection as seen above.

Select the day of the week and the time you would like to schedule and then press the check mark.

The days and times that are available on these lists reflect your calendar setup in H2DOM. If your office is normally closed, you cannot select that time for block scheduling.

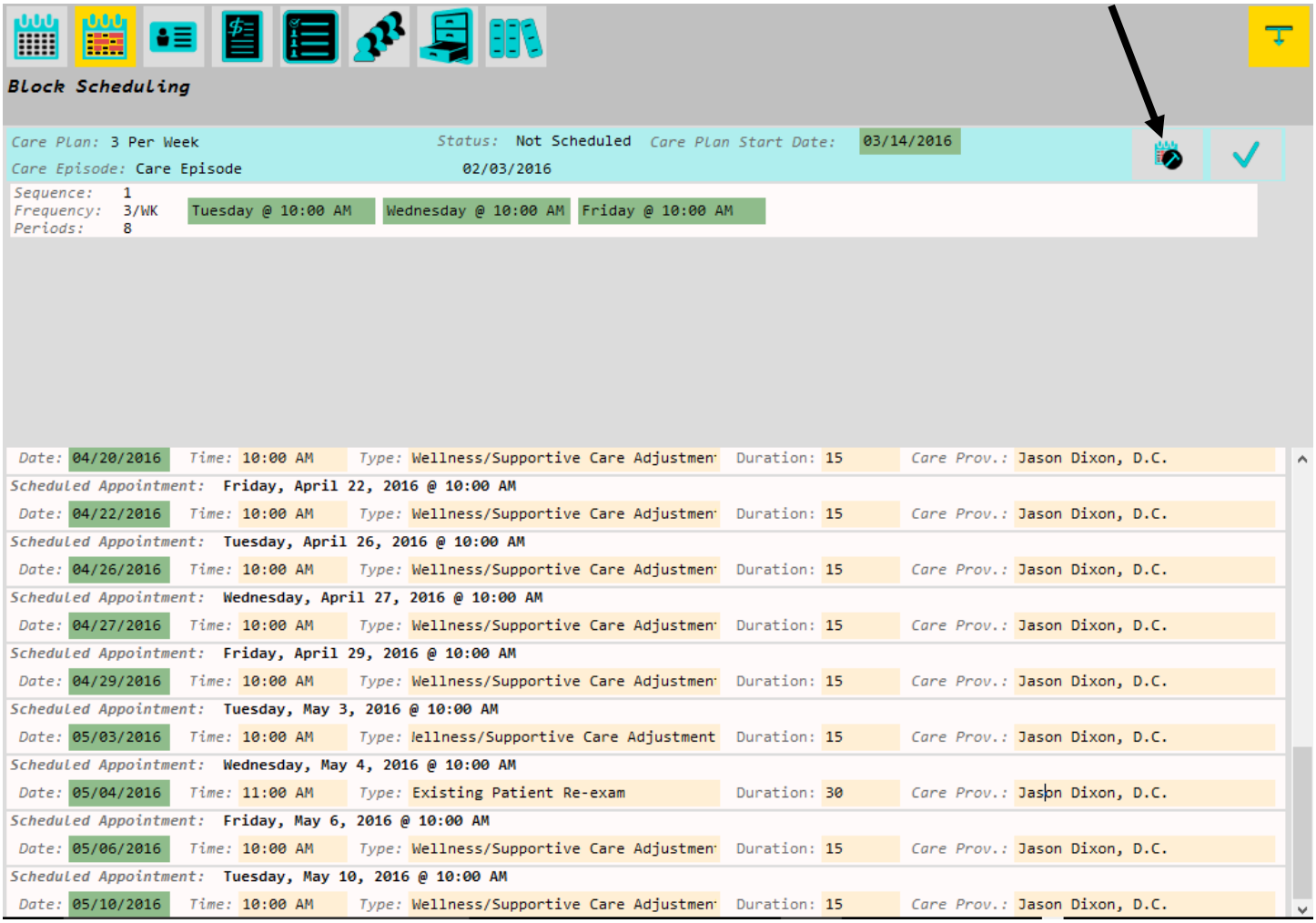
In H2DOM Calendar setup, you can create overrides to your schedule. For example, if you are normally open on Saturdays and you need to close the office on a particular day, create an override and you will not be able to schedule appointments on that day. If block scheduling is set to include Saturdays, the override will cause the scheduling to automatically skip that day and continue the pattern on the next week.



In the example to the left, I have created a schedule override, closing the office on 03/12/16.

“Office Open” is grey, indicating that option is off.

Block Scheduling After selecting the days and times for the schedule, press the build button.



After pressing the “Build Schedule” button, an appointment list will be generated using the settings you selected. Any schedule overrides will be used accordingly.

You can make any changes you need to the block schedule list BEFORE you click the check mark.

After pressing the check mark, these appointments are added to your appointment calendar and will need to be removed by cancelling the appointment if there are any mistakes that need to be corrected or changes made.

You can cancel appointments easily by selecting the appointment on the calendar screen and pressing the cancel button.

You can also cancel appointments on the appointment list on the Front Desk Screen or on the patient summary screen by pressing the cancel button.

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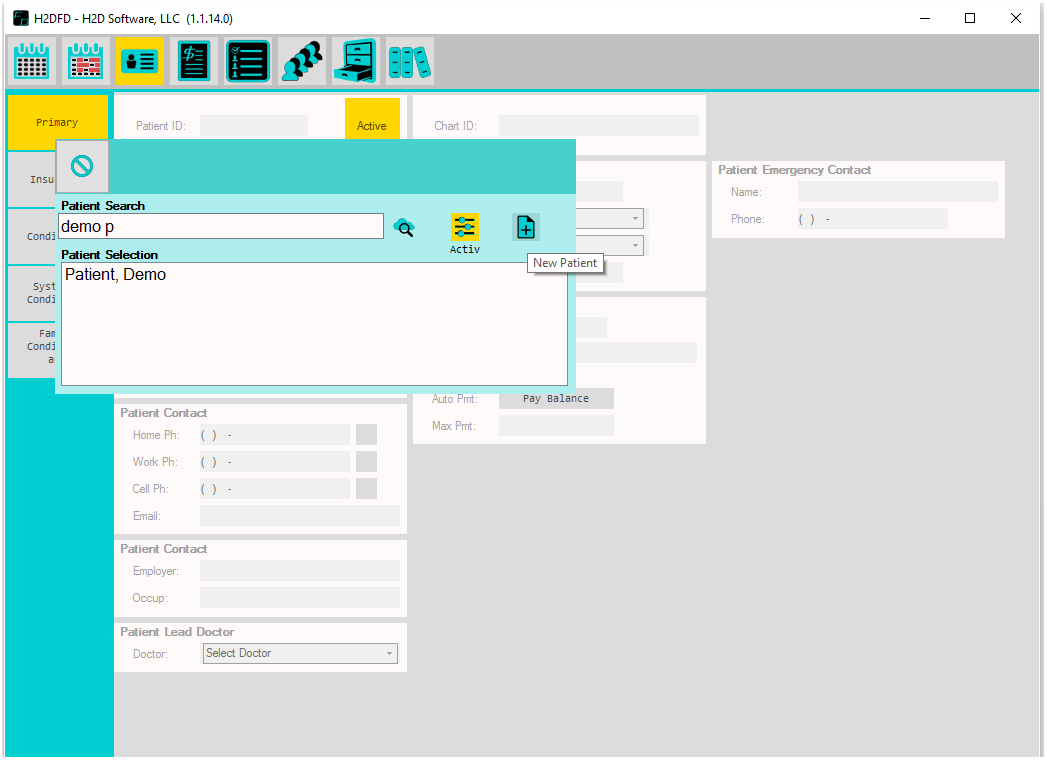
Patient/Practice Member Demographics

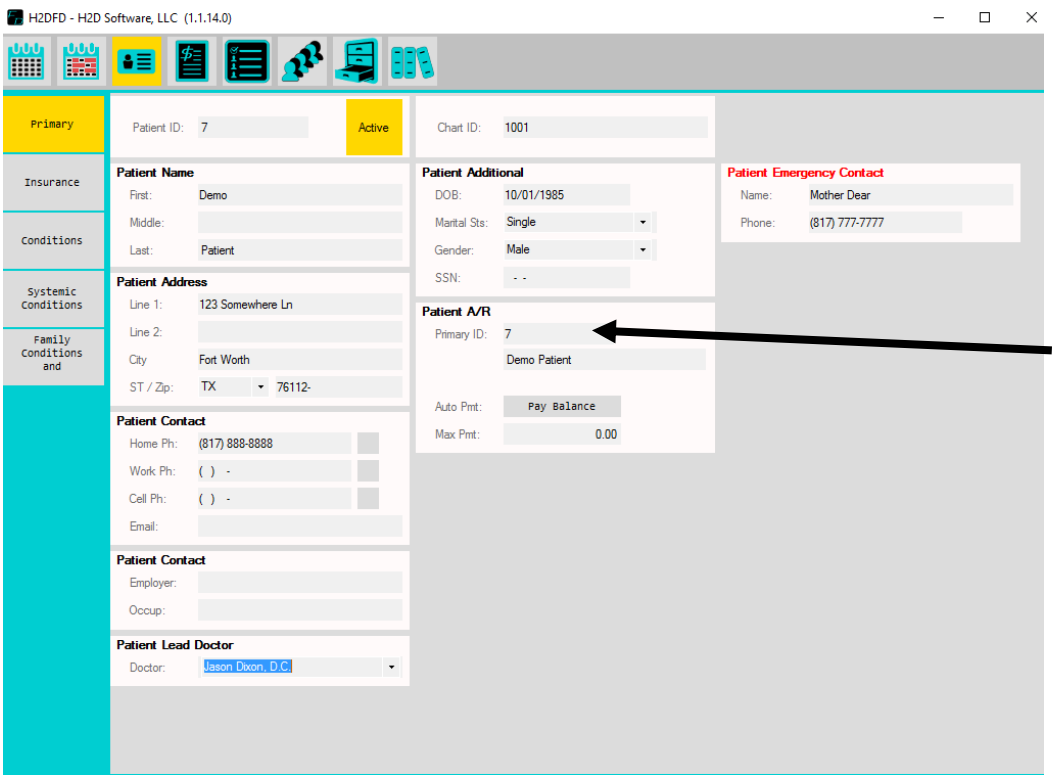


When you open the demographics screen, you can search for existing practice members or click on the new patient button.

After you click the new patient button, anything you enter on the screen is saved.

This search list has not yet been updated to act like our calendar appointment search list yet. You can search for people by the last name, first letter of their last name, or by the first name and first letter of the last name.

The default search setting is to look for active patients. Press the Active button to toggle this option if you need to include inactive patients in your search.



You can link accounting ledgers together by entering the Patient ID from a different patient in the “Patient A/R” section. When the accounting screen is opened for the Primary account, any linked accounts will be added to account statements and may quickly be reviewed on the Primary account.

The “Conditions” buttons on the left will be moved into the patient/practice member summary screen in a future version. For now, you can record medical history and review of systems in this screen.

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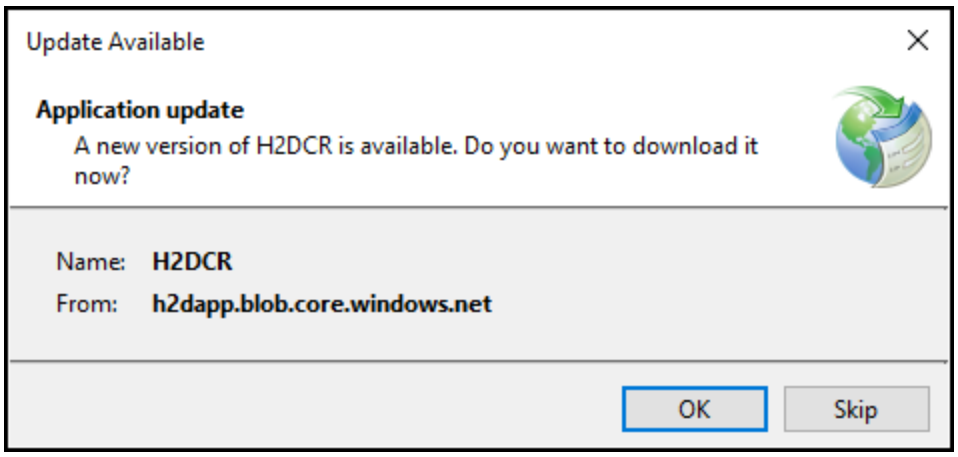
Accepting Updates for the H2D Software System

You will periodically see a prompt to update your software when you open H2DCR or H2DFD 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.

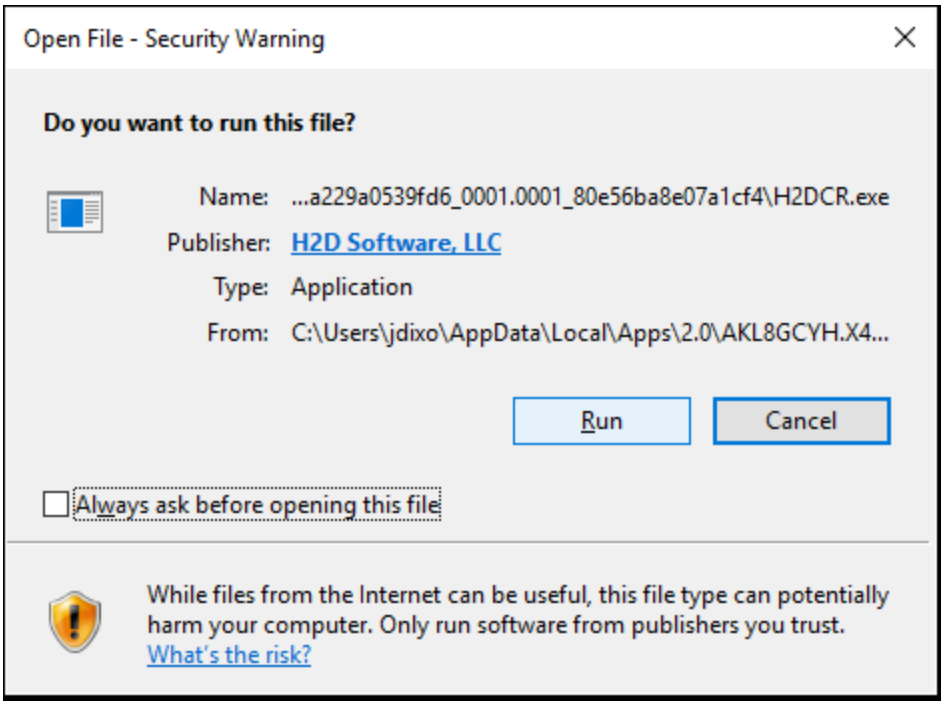
When we add new features that will change the way you interact with the software, you will receive an e-mail notifying you of any changes you should be aware of.

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.

As always, if you have any questions about H2D Software, please contact us.

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Jason.Dixon@h2dsoftware.com

www.h2dsoftware.com

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Backing Up Your Database

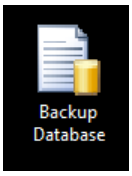
If you are new to using electronic health records, this may be a new concept to you. It is important to back up all electronic records with some sort of offsite backup device or service. There are many HIPAA compliant services available to have your data automatically backed up onto a cloud server.

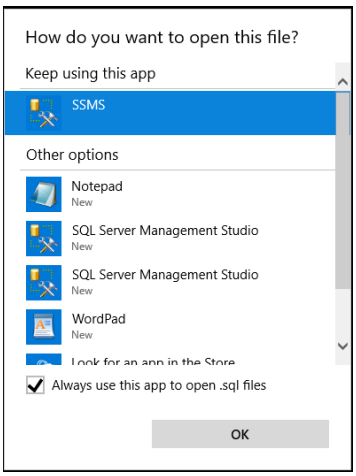
Another method of backing up data is to use an external hard drive or flash drive. If you use an external hard drive, we recommend using a solid state drive since they are more resistant to damage with travel.

Your H2D Software Database does not automatically back up at this time. We have set you up with a shortcut to back up your data. Here is an overview of the simple backup process.

Using the shortcut we provided:

Open the "Backup Database" sql script on your server's desktop (the main windows screen).



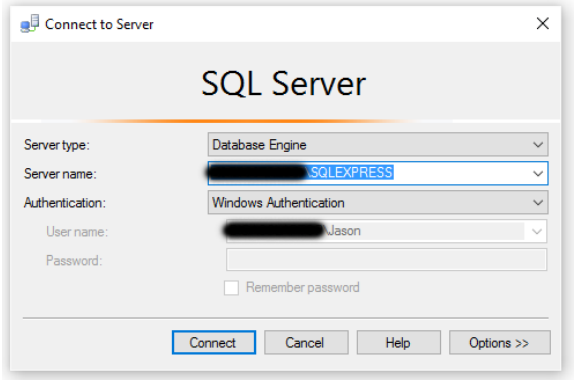


If asked how you would like to open this file, use SSMS (SQL Server Management Studio)

Select "Always use this app to open .sql files" and you should not be asked this in the future.

SSMS 2016 should open for you.

You will need to click "Connect" two times to log in to SSMS.



(Continued on the next page)

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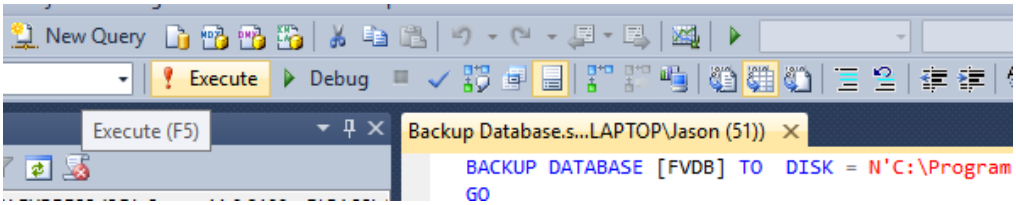
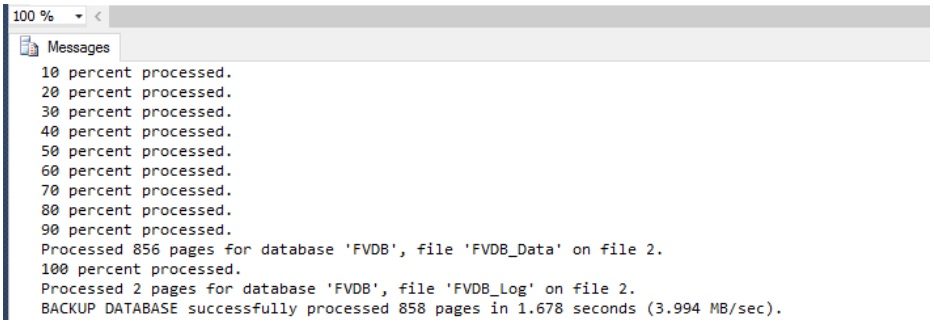
Backing Up Your Database (Continued)

Click on the screen in the large, middle section of SSMS and it will highlight the border in yellow meaning it is selected.

Then click “Execute” or press “F5” on your keyboard to run the database backup script.



Once you see this on the bottom of the middle screen, you have successfully backed up your database on the server.



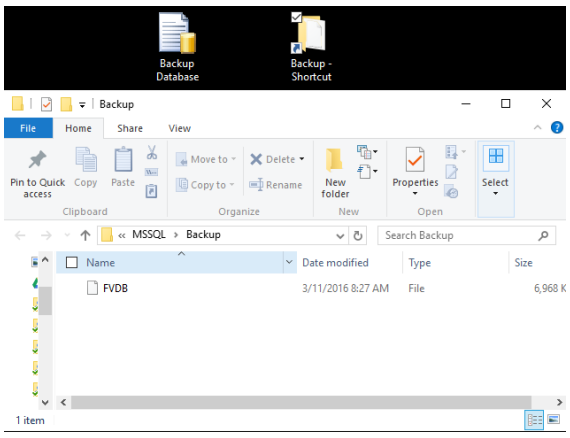
Close SSMS and repeat the steps above as often as you would like to back up your data. We recommend backing up your database at the end of each business day.

IMPORTANT NOTE

SSMS allows you to access your database at any time. Do not make any changes to your data tables, views, etc. as changes will likely cause your software to function incorrectly and may result in the loss of data. If you need help with your data for any reason, contact H2D Software. If you make changes directly to your database that require tech support to correct your mistakes, you will be charged for the time it takes us to make repairs, if repairs are possible.

You will need to back up your database backup file with your external hard drive or backup service.

We have provided a shortcut to the backup file on your desktop.



FVDB.bak is the file you will want to back up with your offsite backup service/device.

In case you lose your shortcut icon, the default location of the file is:

C:\Program Files\Microsoft SQL Server\MSSQL11.SQLEXPRESS\MSSQL\Backup