PracTrak 4 User Guide

Ray of Light Software

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Welcome!

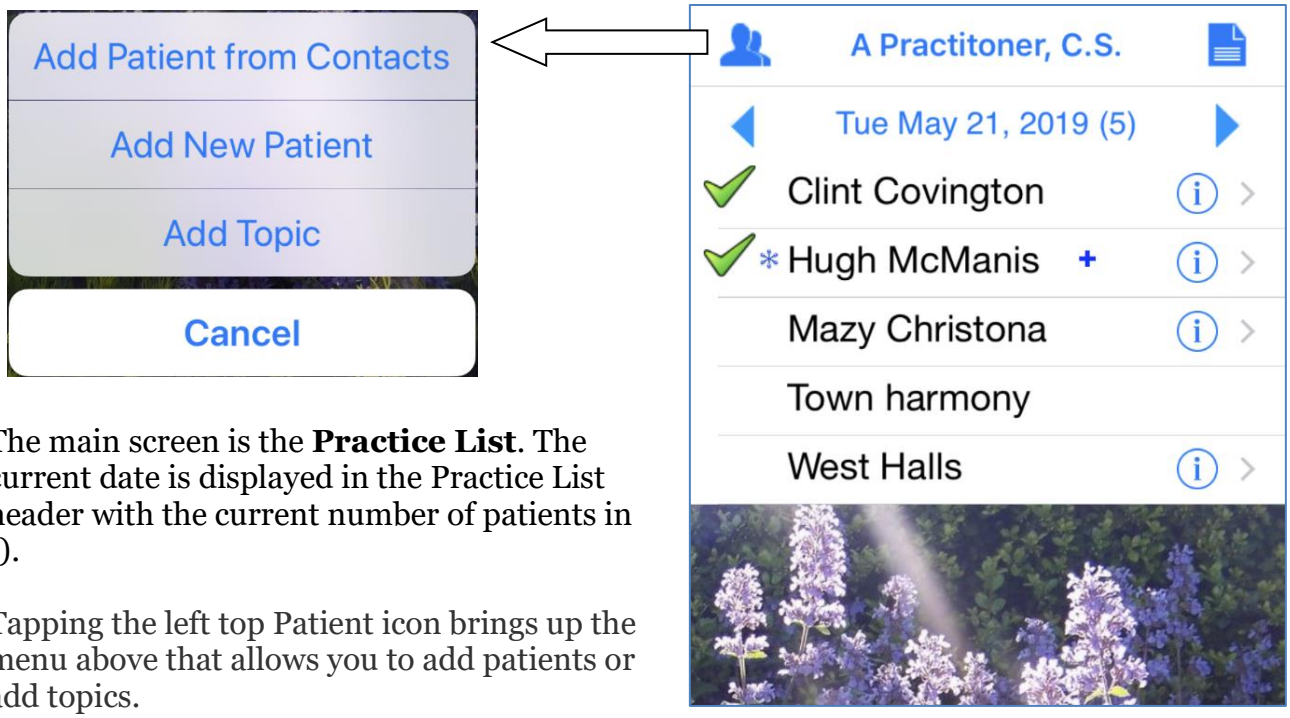
PracTrak is an innovative mobile application that lets the professional practitioner use an iPhone or iPad mobile device to maintain a daily Practice List and then automatically creates monthly invoices based on the treatments listed in the daily Practice List.

It allows you to send invoices to patients via email or regular mail, use PayPal for payments, review monthly invoice and receivable totals, add payments, or re-send invoices. Since all data is stored on your mobile device, and backed up on your desktop computer or to iCloud, *PracTrak* provides the convinence and security of a confidential and secure application that goes where you go.

PracTrak is sold by Ray of Light Software (www.RayofLightSoftware.com). Thank you for your purchase and we hope you enjoy the application and that it gives you a very useful and time-saving tool for your practice! If you have questions or need support please send requests via support@rayoflightsoftware.com.

Quick Overview

There are two main screens: **Practice List** and **Trak** (invoicing functions). All functions are available from these two screens by either tapping on the treatment or month 'cards' that appear in these views.



The main screen is the **Practice List**. The current date is displayed in the Practice List header with the current number of patients in ().

Tapping the left top Patient icon brings up the menu above that allows you to add patients or add topics.

Tapping the right top button in the Practice List screen takes you to the **Trak** or billing screen pictured on the right. This is where you can track your activity and produce invoices.

Invoicing is performed in three phases, all available from the **Trak** screen:

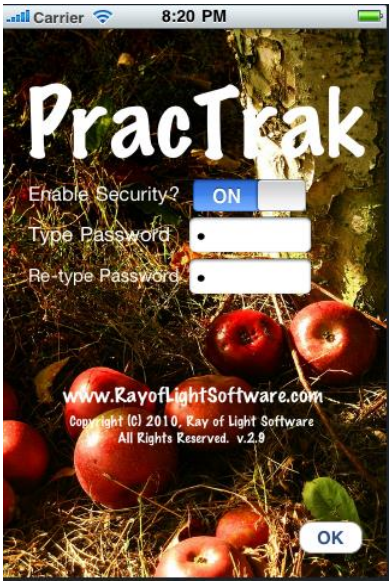
1. Automatic creation of monthly invoices including the option to directly email invoices to patients.
2. Payment entry
3. Review monthly reports and take any follow-up actions necessary: check past due accounts, re-send invoices, etc.

Tools and Settings

Application tools and settings are available from the Trak screen using the upper right wrench (tools) and gear (settings) icons.

Installation and Configuration

You download and install the application from the Apple iPhone App Store. If you already have the application the 3.0 upgrade is free and available from the Apps app on your iPhone or iPad by taping the "Updates" option and tapping PracTrak. You can use this URL to get to the app within iTunes quickly: http://itunes.com/apps/practrak
When you first use *PracTrak* it asks you for basic information: your name, email and billing rate. You can use *PracTrak* with just this basic setup but to send invoices you may want to configure the format of your invoice.

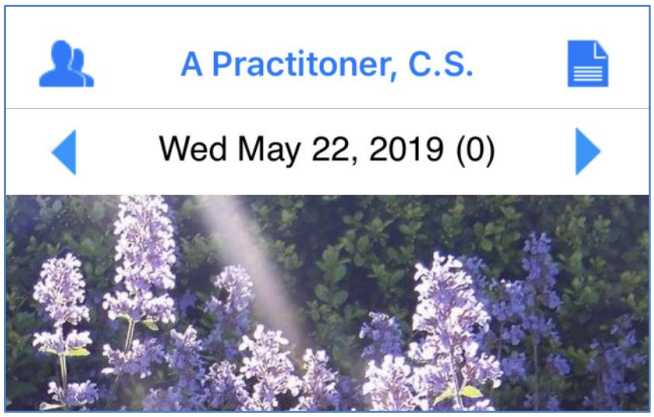


Password Login

PracTrak has the ability to ask a password upon entering the application. This keeps your practice data completely private. If you wish to use this option tap ON when you get to the security screen. Enter your password twice. Tap OK when finished. Don't select ON and there will be no password set.

Practice List

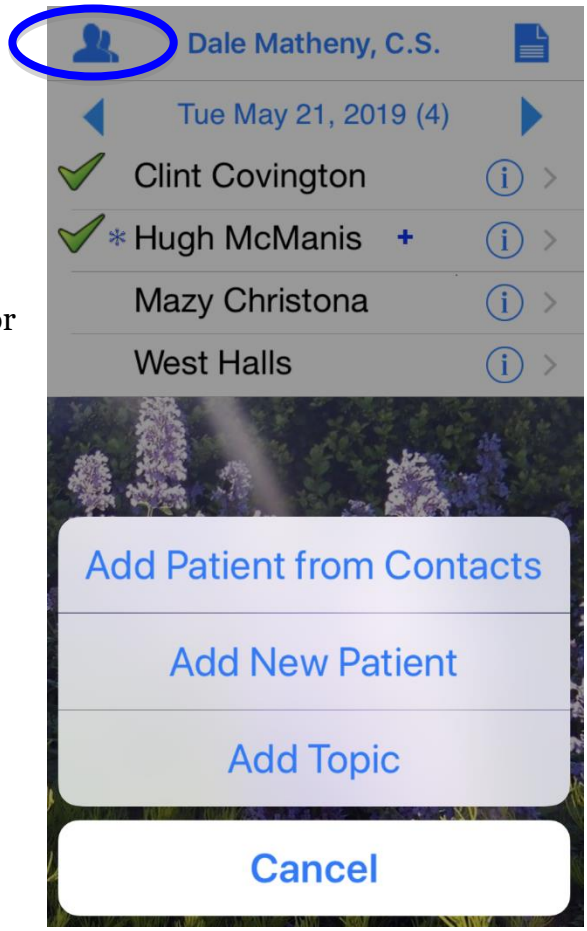
The first screen you see in *PracTrak* is the daily *Practice List*. This is the main area the practitioner will use every day to view and add patients. It starts the day without any items and appears as the image to the right.



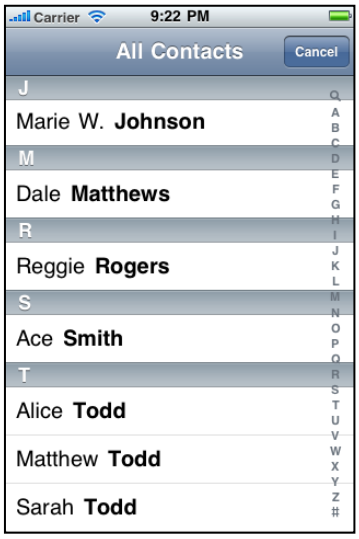
For your enjoyment, a ray of light picture is shown on the screen and changes monthly to a new ray of light image.

Adding to the Practice List

Tapping on the left Patients icon allows you to create a practice list of patients for the day. From the menu (as pictured on the left) tap 'Add Patient from Contacts' to add a patient to your Practice List from your Apple Contacts address book.



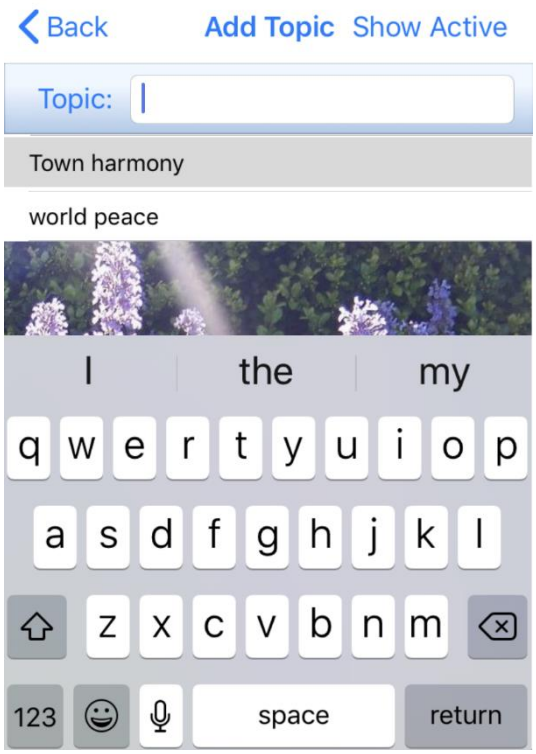
Use the index on the right of the Contact screen or scroll through the names and tap the selected patient name. This creates an entry in your practice list.



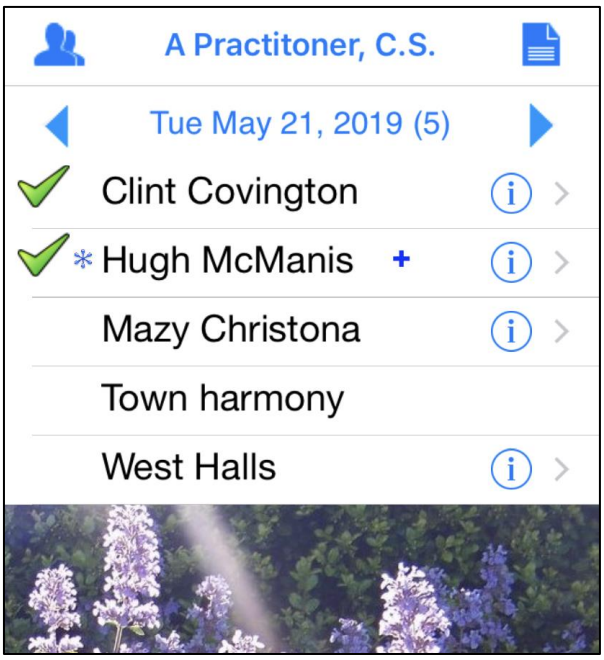
To add a patient who is not in your contact list tap on the "Add New Patient" button, fill in the information and tap "Done". The information will be stored in your contacts as a new contact and the patient's name will be added to your Practice List.

Are there global or local issues you feel need treatment? Tap "Add Topic" to track those events. Topics are added to your Practice List but are not invoiced.

To add a topic either tap an exisiting topic in the list or type a new topic name then press "Back".

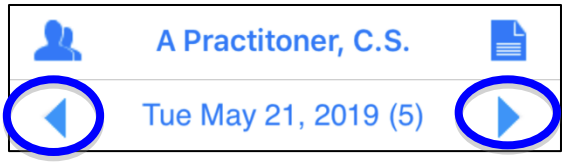


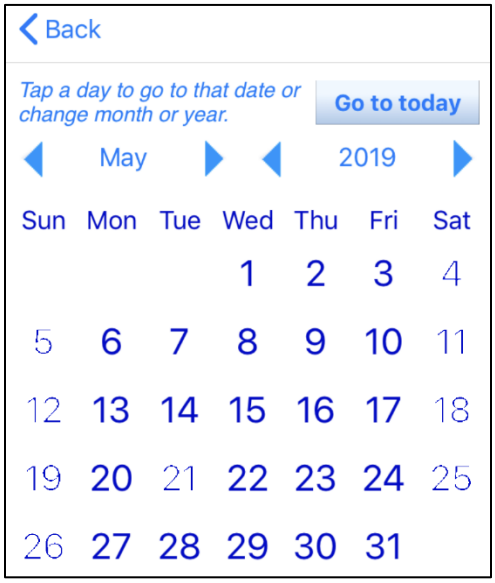
A sample Practice List with 5 patients and a topic might look like this:



Navigation: Review Previous or Future Day's Practice Lists

To review a previous days' or future days' Practice List tap the arrow buttons at the top of the screen next to the date. Tapping the left arrow moves backward one day and tapping the right arrow moves forward one day.





Change Date

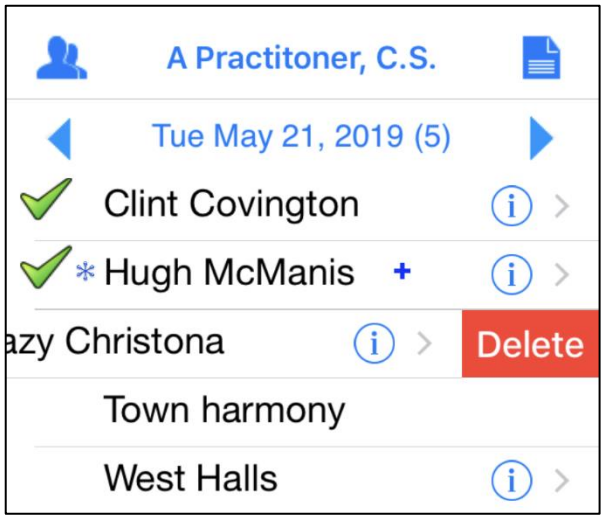
Tap the date to bring up a calendar. Navigate to and tap the date to go to. You may change the month and/or year using the left and right arrows beside the current month and year.

The "Go to Today" button on the calendar to quickly get back to today.

Remove Patient from Practice List

Ooops! If you added a patient's name or topic to today's practice list that shouldn't be there simply swipe to the left or right on the patient's name or topic and tap the red Delete button and the patient's name or topic is removed.

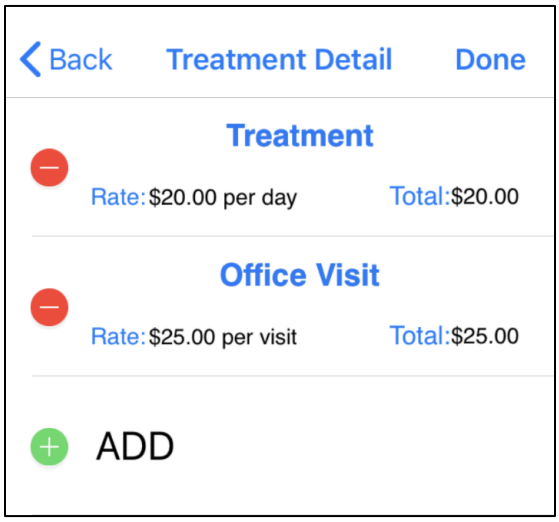
When the delete button is on the screen swipe again to remove the delete if you decide to leave the patient or topic.



Patient check mark

To add (or remove) a green patient check mark tap to the left of the patient or topic. The check mark will be saved for the patient or topic for the current day only.

Edit Treatment Detail



The use of multiple charge or expense types is a powerful feature of PracTrak! With them you can add multiple charges to a single day for a patient. So, as an example, in addition to a Treatment you can add an office visit charge or travel mileage expense.

From the Practice List, click on the blue (i) > icon next to a patient name to get to the Treatment Detail screen.

You can either change the current Treatment (charge) type or add a new one. To add a new charge type for the current treatment tap the green (+) icon next to ADD.

To modify the charge type for an existing card, tap the word in the round white button (such as "Office Visit"). A 'Picker' scrolling list will appear with all available charge types (see the Settings section to learn how to set up new charge types or modify the rates and action of the existing charge types). Scroll through the types and tap the charge type you want.

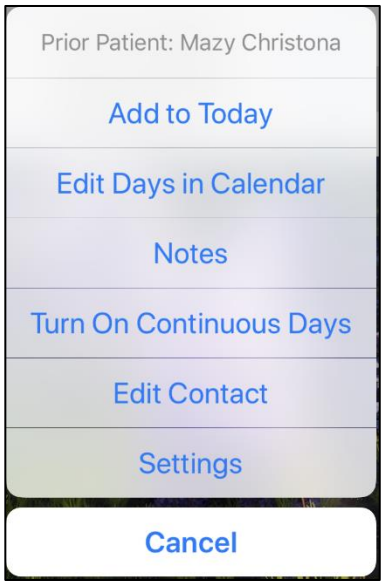
Note with the Mileage Expense charge type there is an input box to type in the number of miles to charge. The expense for 50 miles * $0.50 per mile = $25.00. This is called an "Input Charge Type" versus a "Fixed Charge Type" such as Treatment where there is a fixed rate.

Setting up initial patients in PracTrak

While it is good to start using PracTrak at the beginning of a month if you wish to key in older treatments you can do this easily with the edit days in calendar function on the next page or key in an existing balance due for a patient using the supplied charge type "Starting Balance". With a Starting Balance charge type you can enter a balance, say $120, or any amount. Use this charge type on a 'dummy' treatment record on a month prior to the month you will be starting PracTrak billing.

Patient Functions

Tapping on a treatment card brings up the patient functions as shown on the right. Edit treatment days in a calendar, Patient notes, Edit Contact and Settings may be modified by tapping on the corresponding button.



Moving a patient's name forward to today's Practice List

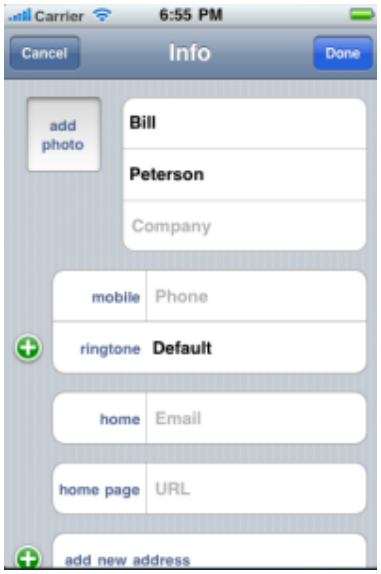
To add a treatment card to today's Practice List using a prior treatment, move back to the previous day(s) by tapping on the left arrow. When you've located the patient's name tap on the name and tap on the "Add to Today" menu button. You will be placed back in today's list with the name added.

Edit days in Calendar

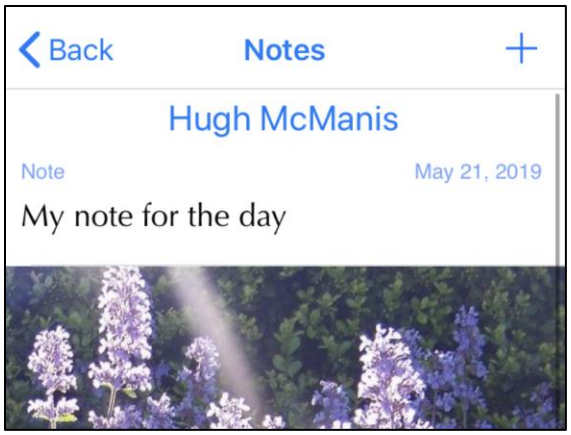
This patient function brings up a calendar with the current treatment days in yellow. Tap a day(s) to add a treatment for the patient for that day. You may also change the month and/or year using the arrows next to the current month and year. If you tap on an existing treatment (yellow date) a question will appear allowing you to edit treatment detail (add multiple charges) or remove the entry.

Edit existing contacts' information

To edit a patient's contact information, tap on the menu item "Edit Contact". The Address Book Info screen appears for the patient. Tap the Edit button on the top right hand corner of the screen to make changes. Tap Done when you are finished and then tap the upper left button to return to the Practice List.



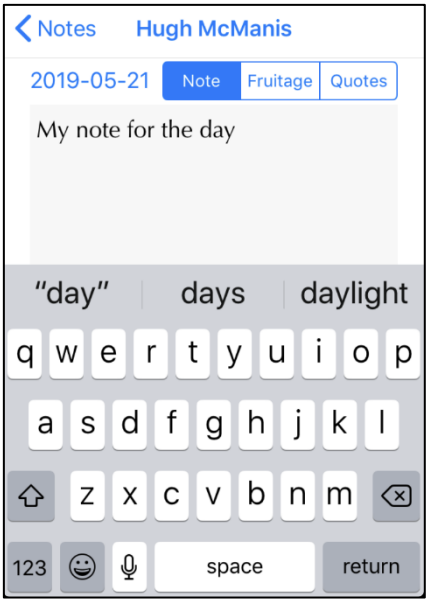
Patient Notes



Do you want to take notes about a treatment for a patient or jot down a quotation to share with a patient? This is easy with *PracTrak*.

Tap on a patient's name which will bring up the patient functions. Then, tap "Notes" to add, view or edit notes or record fruitage.

A list of notes will appear as shown on the left, showing most recent day's notes first.



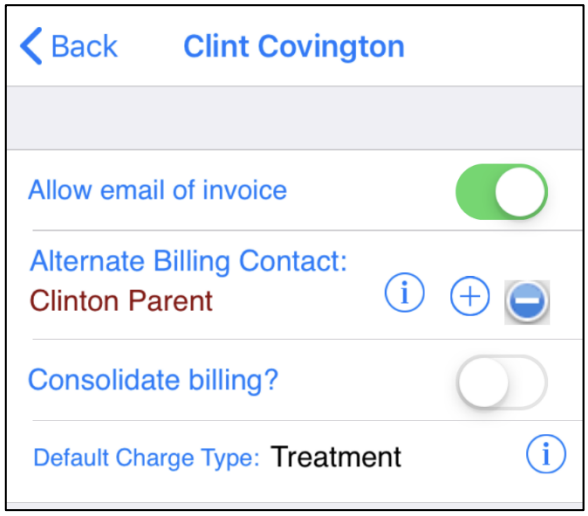
To add a new note tap the "+" symbol in the upper right. The screen to the right will appear. Type the note and set its type: "Note", "Fruitage" or "Quotes". Press the "<Notes" icon in the upper left to go back to the patient's Notes screen. To edit a note simply tap the note and edit.

Notes are dated and ordered with the most recent note appearing on the top of the screen. To delete a note swipe on its card and press "Delete" button. To return to the main screen tap the upper left 'back' button.

Patient Settings

For each patient you can use the "Settings" function and screen shown below. You can allow email of invoice, add an alternate billing contact, and set a default treatment type.

Alternate Billing Contact

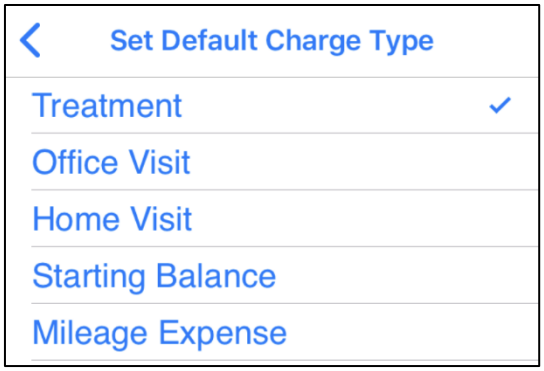


Set up an Alternate Billing contact to send an invoice for the selected patient to another person. This is helpful for minors that are patients. To set up this alternate contact, tap on the patient name in the practice list and from the menu that appears tap "Settings". A screen such as the one on the left will appear. Use the (>) Select, (+) Add New, or (-) Delete options to Select an alternate contact from the Address Book or Add a New Address Book contact to use as the alternate contact or (-) to remove an existing alternate contact. Note

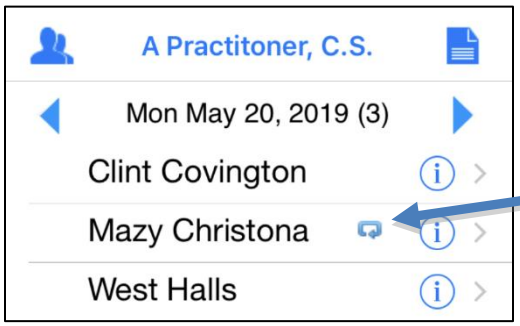
that you can also get to this function from the Patient Functions menu from the Trak Tools screen.

Set default treatment/charge type for a patient

Using the Settings screen as shown above tap the arrow on the "Default Charge Type" line. A dialog appears. Tap the default charge type. From now on, for the patient it is set for, the selected charge type will be assigned as the default charge type when a treatment is added to the Treatment List front screen of PracTrak.

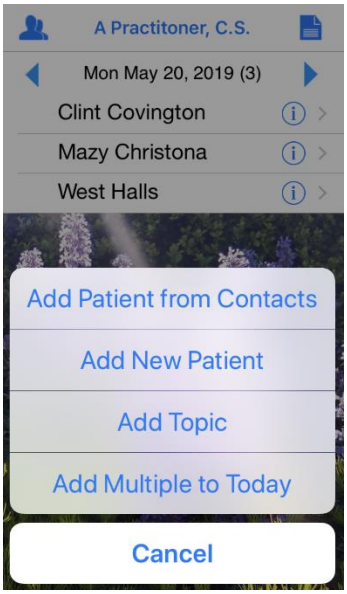


Continuous Days Function



The 'Continuous Days' feature automatically adds a patient or topic to today until the 'continuous' flag is turned off. Note the continuous icon next to the patient name if the function is turned on for a patient.

Adding multiple patients to today



To add multiple patients to today from a historical date, tap the upper left Patient icon and the menu to the left appears. Tap "Add Multiple to Today" function.

The patient list is modified to allow multiple selection of entries by tapping on the empty circle. When tapped, a check mark appears. On the top of the screen tap "Add" to add all selected patients to today's date.

Tap "Cancel" to cancel the function without adding names to today's date.

Creating Invoices

PracTrak supports an invoicing process that is very automatic and easy. All invoices are calculated and formatted for you — all you have to do is to add any notes or reductions and email the invoices (or print them out and mail them via regular mail).

Here is the process summary:

- *PracTrak* automatically presents the invoices for a month in an invoice review list, one entry per patient
- Make sure all invoices have addresses (either email or regular address)
- Edit any invoices to change rate, add a discount, or add a note.
- Email invoices to patients that have email addresses
- Close function: Email all remaining invoices to the practitioner to be printed and mailed via regular mail. All remaining invoices are formatted as a single PDF file that may be emailed and then printed in one step. If all invoices to print are OK then use "Close invoices" function to close invoices.
- Once invoices are closed (emailed or printed) then payments may be applied to the patient and the system will track the payment to any (and all) closed invoices in the past for the patient.
- A Patient Statement report may be produced (emailed or printed) at any time that shows all past invoices and payments for a patient in time order. This is useful if questions come up from the patient or a review is needed.

A detailed demonstration and explanation of the monthly invoice process follows.

1) **Go to the Trak monthly list screen**. You get to this screen by pressing the upper right 'invoice' icon on the Practice List main screen. The Trak screen appears as on the right and summarizes all treatments for every month in the displayed year as entered in the Practice List. You may use the arrows on the top to go back or forward one year.

   The Total cell at the bottom of the list summarizes all treatments for the entire year.

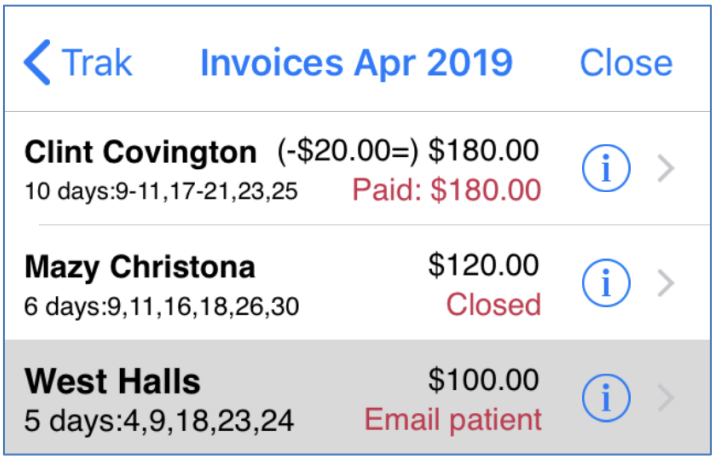
   Note that the current month (May on the Trak screen) isn't complete and so the amounts are just based on treatments 'to-date'.

A report is available for the month by pressing the (i)> icon to the right of each month. The summary metrics are:

Patients	# of unique patients during the month
Treatments	# of treatments for the month
Invoiced	Total amount invoiced during the month based on treatments in the Practice List.
Reduced	Total amount of reductions applied on invoices
Applied	Related to payments, this is the amount of payments tracked back (or applied) to closed invoices. This supports an accounting approach for recognizing revenue when it is earned. Note that this field may not have its full amount displayed until 1-2 months after the month since it relies on future payments being tracked back to the current month.
Payments	Total amount of payments recorded as received during the month. This supports an accounting approach for recognizing revenue when it is received (Cash basis).

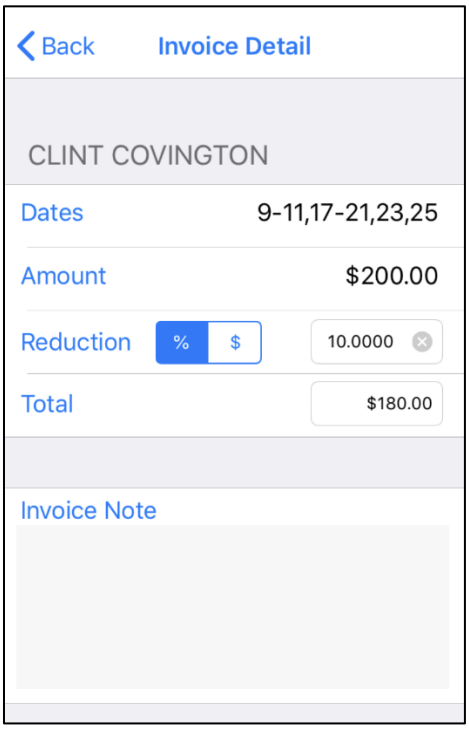
April in the example above is a month that is complete and ready for us to send invoices. We will use that month in the examples that follow.

2) **View all patient invoices for a month.** Tap the card for April to review and send the invoices for April. You should see a screen similar to the one to the right. The invoices are automatically generated but you sometimes need to add reductions or notes to them. There is one 'card' displayed for each invoice (patient). On each invoice 'card' the name, amount, # of days and the days of treatment and a status is displayed.



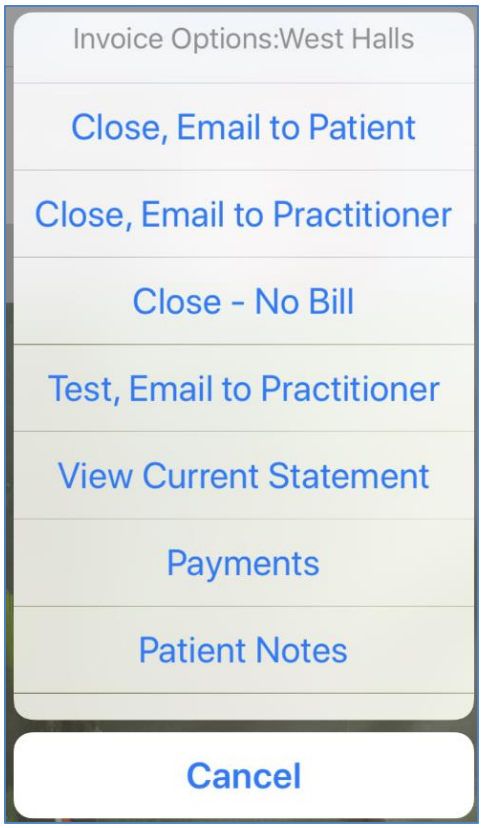
Look at the status for each patient in red. If the status reads "No Address" then you need to add a regular or email address for the patient. When you have no address, tap the card and select the option to "Edit Contact" and you will be taken to the contact edit screen where you can edit the address. When finished, just return using the "Done" button and you are placed right back in the invoice list and the status for that patient will be updated.

3) **Add optional individual invoice reduction and/or note.** If you wish to add a reduction or note to the invoice select the right blue arrow button (>). An invoice detail screen appears as shown on the right. A reduction can be entered using the % or $ buttons and typing a reduction amount. The total recalculates when the user leaves the reduction field. The total field can also be edited as well if needed.



The note field (which appears at the bottom of the invoice detail) can be edited. The invoice note will appear at the bottom of the invoice and is only for the invoice being edited.

Enter your information and press the upper left "Back" button when finished.

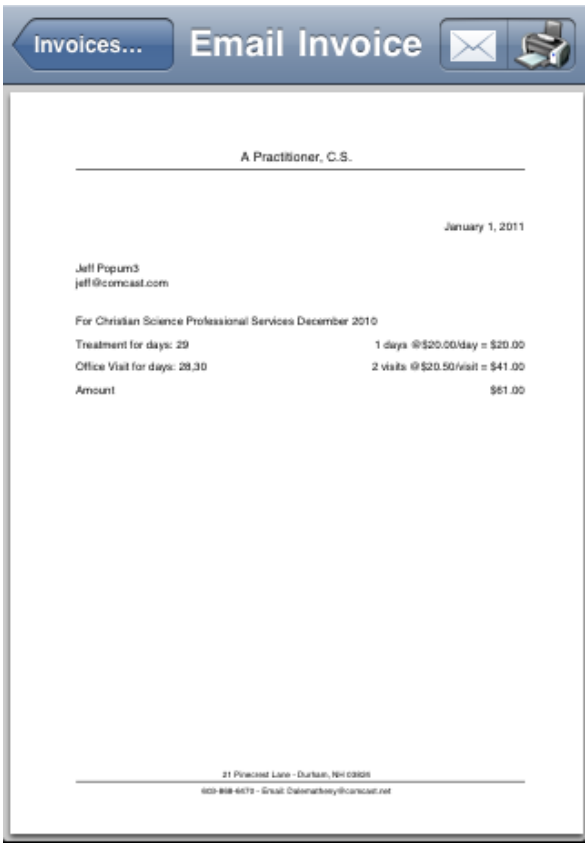


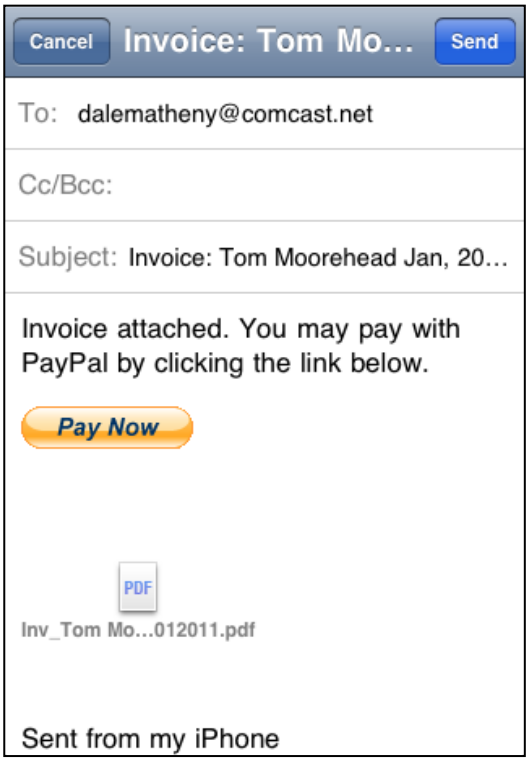
4) To **create and email the invoice**, tap on the invoice cards with the status "Email patient" and the invoice options screen for the patient as shown to the left. Press "Close – Email to Patient" or "Close, Email to Practitioner" to email to yourself first. "Close – No Bill" will close without sending the invoice. "Test, Email to Practitioner" will allow you to receive the invoice but not close out the invoice for the month.

Review the invoice if you need to from the viewer (by pinching or double tapping to expand and tap-slide to move around) and press the Email icon to email the invoice to the patient. A cc: of the invoice to the practitioner will also be sent. Then, press the back left button on the top of the viewer to return to the Invoices screen.

Repeat this action for all "Email Patient" invoices until they all have a status of "Emailed".

Example viewer screen with an invoice is shown below. Note the Email and Print buttons in the upper right. The phone can be tilted to a horizontal position to view a larger version of the invoice or double tap the screen to zoom in on certain portions of the invoice (double tap again to reduce the size of the view).





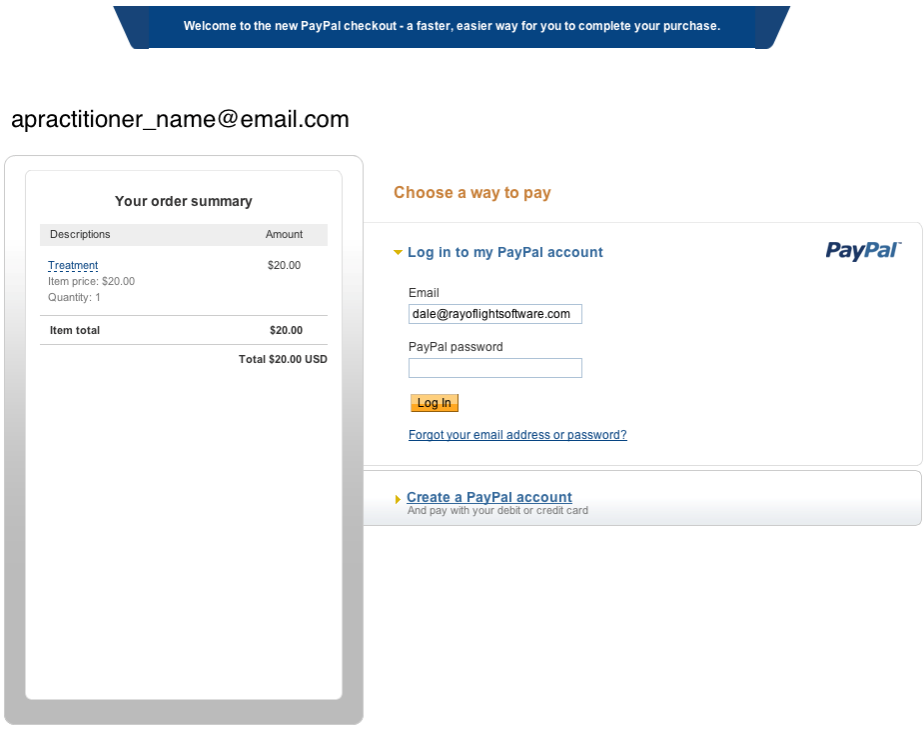
Email Invoice

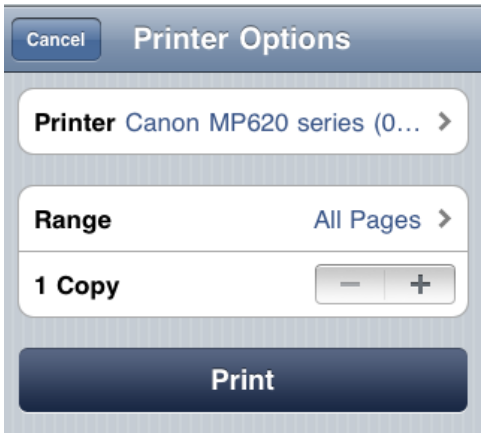
Tap the email button to email the invoice to the patient. The email screen will appear as on the right. You may modify any address or text before tapping "Send" to send the email.

PayPal Payments

With PayPal option the practitioner gives the patient an easy method of payment. PayPal especially makes foreign exchange of currency transparent and easy. The "Pay Now" button on the email will take the patient to a PayPal screen that allows them to pay directly. This button appears if you have set up a PayPal account and typed the email of it into the PracTrak Settings. See the Settings section for how to configure this option.

When the user taps the PayPal button on their email an internet browser opens with the a PayPal invoice screen such as the one pictured below. The patient then can log in to his PayPal account and use credit card or bank accounts to pay the practitioner the charge listed on the left of the invoice.

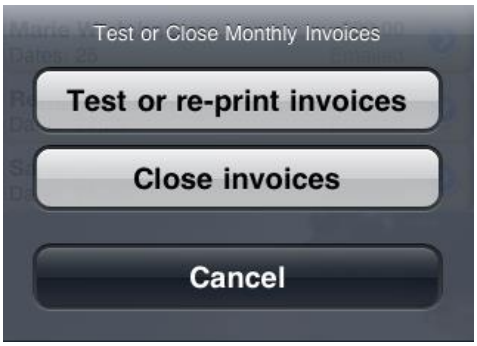




Printing

Printing of the invoice or report directly from the iPhone or iPad to a printer is possible by tapping the print icon in the upper right corner of the viewer. A screen like the one to the right will appear. Select the options and tap Print. When it is finished you will return to the viewer. See the back of this document to configure a printer for printing from the iPhone or iPad.

5) To finish the billing process let's get a copy of all remaining, non-emailed, invoices so we can print and mail them to our patients. Press "Close" on the top right of the Invoices screen to format all remaining invoices into a PDF file. When the menu shown to the right appears choose "Test or re-print invoices". It's a good practice to use "Test or re-print invoices" and review the invoices first.



Once you choose an option, the invoices will be shown in the viewer within a few seconds in a single, scrollable, PDF file. Once you review

them in the PDF viewer screen, tap the email icon in the upper right (or the Print icon to directly print them). If you email them to your home computer, print out all invoices in the PDF file, review them, and mail them to your patients. If any are wrong you can go back and edit an individual invoice and re-email the edited invoice to yourself for printing.

When all invoices are sent correctly, choose the "Close Invoices" option, by tapping the upper right *Close* again, and all invoices will be closed for the month. You can keep the monthly summary report and final PDF files it sends to you for your final record for the month. Be sure to send the final Close Invoices email to yourself or the invoices won't be closed.

Note that there are configuration options to format the invoice text to your requirements. This is covered in the *Modifying Invoice Format* chapter later in this document. Also, an option is available to suppress the letterhead so you can print out the invoice on your own letterhead. This is an option–you can have the computer generate the letterhead or you can use your own.

Close status important for payments

When finished, all of the monthly invoices should have a status of Sent or Emailed when closed. **It is good practice to close all invoices** as this status is required for payments to be posted (tracked) to the invoice. Once payments are applied the payment will appear in the status field.

Mid-month or multiple invoices per month per patient

PracTrak has the ability to create multiple invoices for a patient during a single month. To do this close (send) the invoice for a patient mid-month. If you have further treatments in the month they will be created in a new invoice for that patient. This will create multiple invoice records for the same patient for a month but that is ok. Payments should be applied as normal.

Re-open Closed Invoices

A closed invoice can be re-opened if necessary. To do this select the "Re-open Invoice" function from the selection menu when you tap on a closed invoice. The invoice will be regenerated so if you have any additional treatment days in the treatment list for that patient they will be included in the new invoice that is generated. Once re-open the invoice should be closed (sent) so that payments may be applied to the invoice.

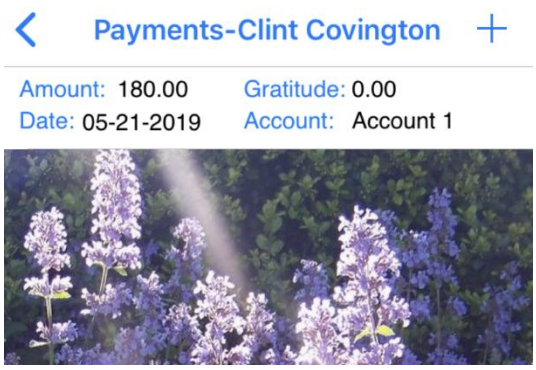
Payments

When patient payments come in its easy to enter them in *PracTrak*. Recording a payment allows *PracTrak* to keep track of your receivables and produce monthly reports that can be used for your information and for tax purposes. The Payment function is available in two places.

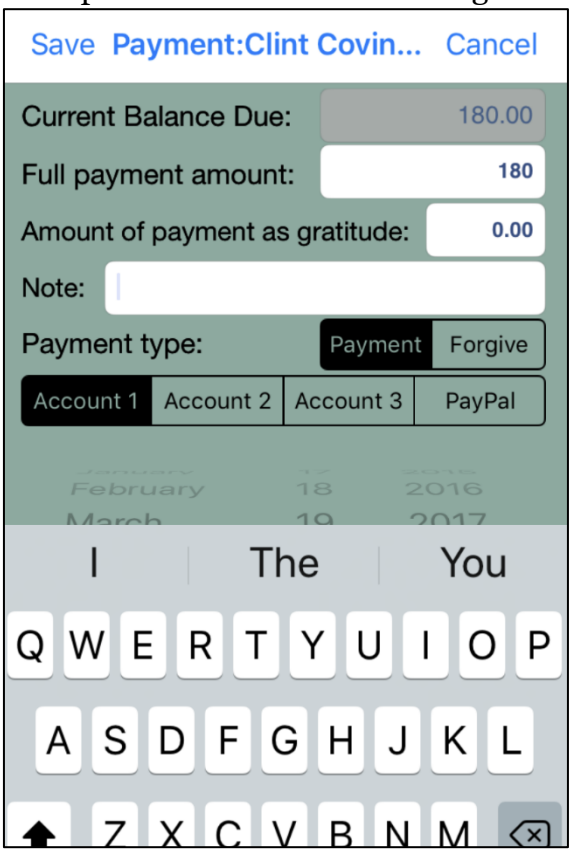
1) Go to the monthly invoice list, tap a closed patient invoice and tap the 'Payments' button. This brings up the Patient Payment screen as shown below for the patient you are on. Enter a payment amount, account, and date and press the back arrow in the upper right.

OR

2) Go to the Trak screen by pressing the tools wrench icon from the upper-right of the Trak screen and tap the "Payments" option. Select a patient from the Address book and the payments management screen appears (shown to the right).



The Payments screen for a patient is where you may create, update, or delete payment records. To create a payment record press the "+" button in the upper right. To delete, swipe a current record left or right. A "Delete" button will appear. Tap it to delete the payment record. To update a payment record tap the record to edit it.



When adding or updating a payment record the screen to the left will appear. The current balance due is given first—you can't edit this.

Key in the payment amount and, optionally, the amount over and above the amount due that you consider a 'gratitude gift'. Also select a date the payment was received and optionally an account and payment type. **Press the upper-left "Save" button when finished to commit the new or updated payment.**

The amount of 'gratitude' will not be applied against a bill or be treated as a credit. All non-gratitude amounts of the payment amount *will* be applied against existing invoices and you should see a 'paid' amount on those invoices in the monthly invoices screen telling you the invoice is paid.

You can choose a 'Forgive' payment type to forgive an amount due. This amount will count as a paid amount and lower the amount due but there is no corresponding check from the patient in your bank…you have forgiven an amount due.

When you leave the Payments Management screen all invoice paid amounts for the patient will be updated. PracTrak automatically tracks the payment back to the related invoice(s) for that patient and marks them as paid. The payment function also updates the monthly summary "Received" total so you know how much has been paid for each month and for the entire year. The "Payments" total on the monthly summary tells you how much is paid each month (based on payment date) rather than a track back to the invoice like the Received column does. **This gives you the ability to track revenue (or income) by accrual (Applied total) or cash basis accounting (Payments total).** The Applied or Payments totals are on the monthly Trak records.

Modifying Invoice Format

Invoice format is controlled by the Letterhead Format and the format of the main body of the invoice. Both are described below.
The parameters mentioned are set at the bottom of the Settings screen. To get to the Settings screen, go to the Trak screen and tap the upper right Settings (Gear) icon as shown here:

Letterhead Format

Scroll down the settings screen until you see Letterhead format. The letterhead formatting section is the last section of parameters in the PracTrak settings. You may choose from four formats of letterhead or "None" in the "Letterhead Type" setting.

You should also review and update the contact information in the Contact, Address1, and Address2 fields. An email and phone number can be typed in the Contact field if needed. Example "email: dale@yahoo.com – phone: (906) 561-xxxx"

Letterhead examples

Format #1: Address and contact in footer

A Practitioner, C.S.

BODY OF INVOICE OR REPORT

21 Pinecrest Lane - Portsmouth NH 03215

dalematheny@comcast.net Page 1

Format #2: Address in header, contact in footer

A Practitioner, C.S.

21 Pinecrest Lane
Portsmouth NH 03215

[BODY OF INVOICE OR REPORT]

dale@yahoo.com

Format #3: Contact in header, address in footer

A Practitioner, C.S. dale@yahoo.com

[BODY OF INVOICE OR REPORT]

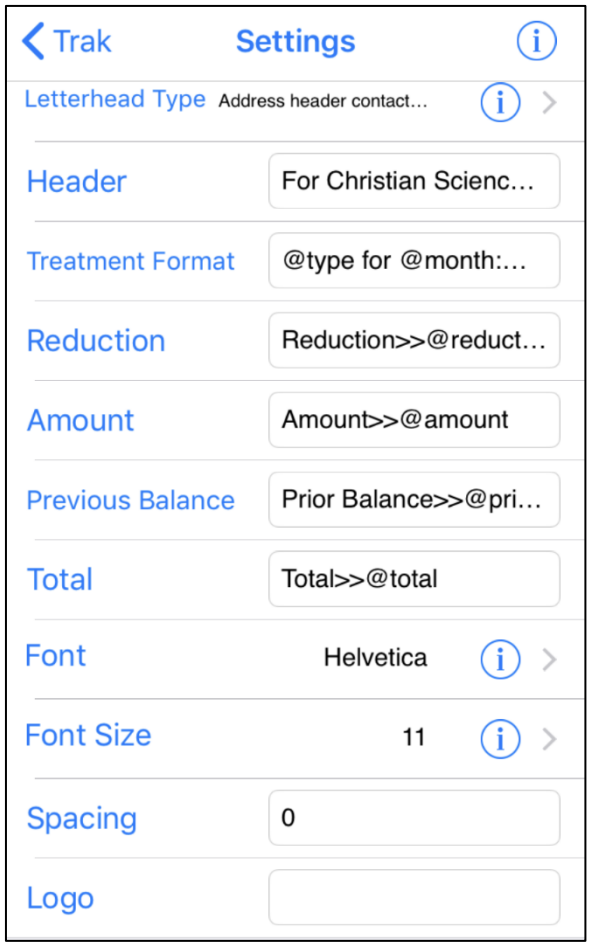
21 Pinecrest Lane Portsmouth NH 03215

Format #4: Address and contact in header

A Practitioner, C.S.
21 Pinecrest Lane, Portsmouth NH 03215
dale@yahoo.com

Invoice Format

To format your invoice go to the Settings screen and find the Invoice Format area as shown to the right.



There are six lines that can be edited with your changes: Header, Treatment Format, Reduction, Amount, Previous Balance and Total. See the example below for how to set up these fields if you modify them from their default format.

The font, font-size can be set as well as the number of lines of blank space from the top of the invoice using the "Spacing" option. Spacing option sets the number of **inches** down from the top the date of the invoice should begin. Decimal numbers are allowed. A value of zero (0) will default the spacing to a standard amount.

Logo will print a logo png image at the top of the invoice instead of the practitioner name. The letters ".png" should be typed at the end of the image file name as shown to the right.

Modifiable Parameters

PracTrak uses **defined parameters** that substitute patient information into the invoice. Notice that any text with the @ symbol directly in front of it is one of these parameters. The >> symbol means right justify the text that follows. The > symbol means right justify 2/3rds across the page. This table explains all of the substitute parameters:

Parameter	***Description***	***Example output***
@month	Current month number	August
@year	Current year	2010
@prior_bal	The prior $ balance outstanding from prior invoices (This is an optional parameter and only used if the "Prior Balance" Setting is ON.	$30
@type	The type of charge type. Since there are multiple charge types possible this identifies which is which.	Treatment
@quantity	Quantity of the charge. This is usually the	4

	number of days of treatment but could be the number of miles on a mileage expense type	
@days	Treatment days invoiced for the charge type	1,3-5,9,12-14
@rate	Rate invoice charge type is billed at per quantity	$20
@unit	The charge unit of work.	Day
@amount	Total amount before reduction	$160.00
@reduction	Reduction. Will show % or $ reduction depending on the % or $ option used when specifying the reduction in the invoice detail screen.	(50%)
@reduction_amt	Forces the reduction to display as an amount, even if the reduction is entered as a % value	($80.00)
@total	Total invoice billing amount after reduction	$80.00

Example Invoice Format

Note that the treatment format line is the most involved because it is used to list all of the different charge types and should contain at least the days of treatment and the total amount billed for that charge.

Parameter	**Example text**
Header	For Christian Science Treatment for @month @year
Treatment	@type for days: @days>>@quantity @units @@rate/@unit @amount
Reduction	Reduction >>@reduction
Amount	Amount>>@amount
Prior Balance	Prior Balance>>@prior_bal
Total	Total >>@total

This format is very flexible and can format invoices with or without reductions, prior balances, and one or more charge types.

Example Invoices produced with the format above.

Invoice that has one charge type: Treatment

A Practitioner, C.S. 603-868-6470

January 8, 2011

Tom Moorehead
17 Chelmsford
Chelmsford, MA 05521

For Christian Science Professional Services for January 2011

Treatment for days: 2,5,6	3 days @$20.00/day	$60.00
Total		$60.00

This is the day the Lord hath made, be glad, rejoice! "Progress is the law of God" Science and Health p. 233

21 Pinecrest Lane Durham NH 03824

Invoice with multiple charge types, a reduction, and a prior balance >>

A Practitioner, C.S. 603-868-6470

January 8, 2011

Greg Smith
91324 W. 76th
New York, NY 10051

For Christian Science Professional Services for January 2011

Treatment for days: 5,6	2 days @$20.00/day	$40.00
Office Visit for days: 4	1 visits @$25.00/visit	$25.00
Amount		$65.00
Reduction		($40.00)
Amount		$25.00
Prior Balance		$25.00
Total		$50.00

Here is a note to put on the invoice

This is the day the Lord hath made, be glad, rejoice! "Progress is the law of God" Science and Health p. 233

21 Pinecrest Lane Durham NH 03824

Tools, Reports and Statements

Several tools, reports and statements are available from the Trak and Invoices screens.

View Monthly Summary Report

From the Trak screen, tap on the month's blue circle with the (i) > icon to view this report. The main report is the Invoices and Payments reports which can be emailed to you by pressing the email icon from the viewer window. A sample monthly summary Invoices and Payments reports are shown below. As invoices are created and payments are entered into the app the reports will be updated.

Invoices report:

A Practitioner, C.S. 603-868-6470

Monthly Invoice Summary for: December 2010 as of January 8, 2011

Patient Name	Days	Amount	Reduced	Total	Received
Ace Tomlin	29	$20.00		$20.00	$0.00
Georgia Flemming**	27,29	$40.00		$40.00	$0.00
Jeff Popum	29	$20.00		$20.00	$0.00
Ralph Waldo**	1	$20.00		$20.00	$22.00
Tom Moorehead	27	$20.00		$20.00	$0.00
Totals				$120.00	$22.00

*Address Required
**Emailed to Patient

Payments report:

A. Practitioner, C.S. 603-661-5936

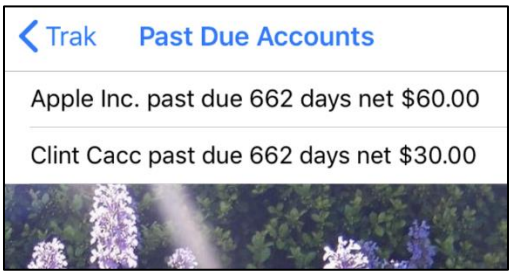
Payments recorded in: April 2011

Account	Date	Patient Name	Amount	Gratitude	Credit
Checking	Apr 9, 2011	Greg Smith	$25.00		$25.00
Checking	Apr 12, 2011	Greg Smith	$50.00	$25.00	
Checking	Apr 13, 2011	Greg Smith	$50.00		
Checking	Apr 16, 2011	Nancy Fledger	$45.00	$45.00	
Account Total			$170.00		
PayPal	Apr 16, 2011	Georgia Flemming	$50.00	$50.00	
PayPal Total			$50.00		

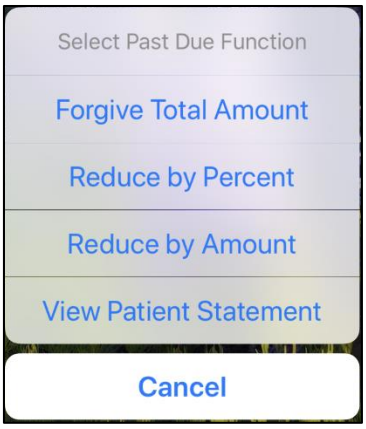
21 Pinecrest Lane Page 2 Durham, NH 03824

Past Due Accounts Report

Selecting this function will display all patients whose last payment is 45-days 'past due' or over 45 days since their invoice was sent out that still has an outstanding amount. The 45-day option can be adjusted in the iPhone Settings to 60 days or other number of days. A screen will show you the past due accounts when the "Past Due Accounts" menu option is selected from the Patients menu from the Trak screen:



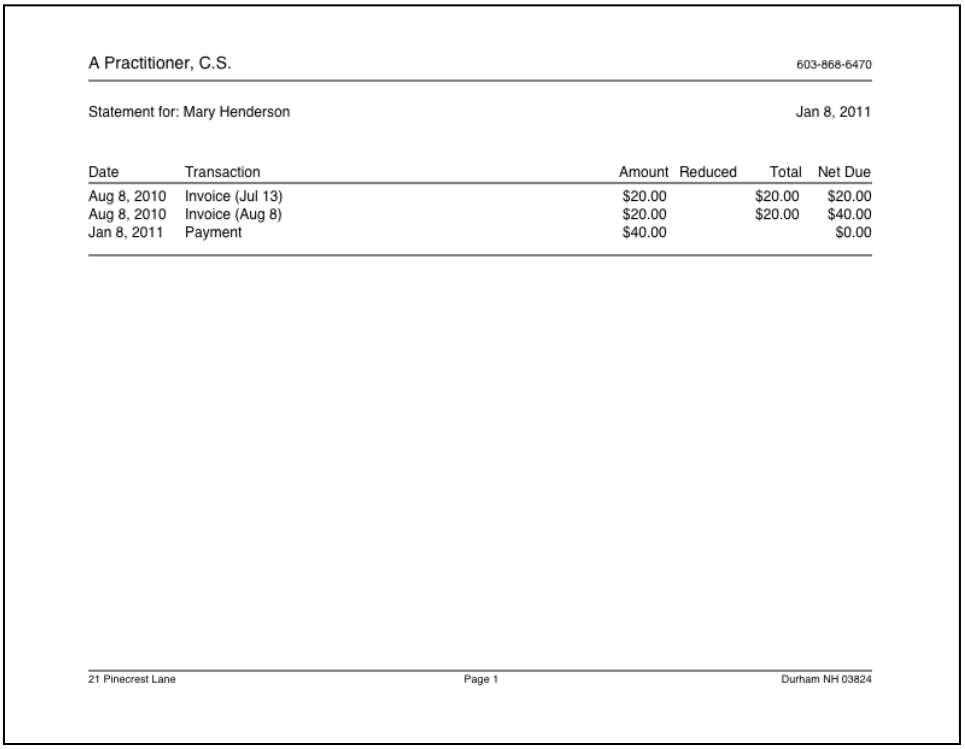
There are four actions you can take for any past due account. Tap any patient record and the menu of these actions will appear:



The "Reduce by" functions bring up a dialog for you to reduce by percent or amount the amount still due. Forgive reduces the entire amount. View Patient statement allows you to view and optionally send to the patient a statement of activity so you can re-invoice the patient for the amount remaining.

Patient Statements

When you tap on an invoice on a monthly invoices screen you have the option of producing a Patient Statement for the patient. A Patient Statement shows past invoice, payments, and reductions with a net due over time for all transactions (invoices and payments) you have had with that patient since you began using PracTrak. It is also available from the wrench (Tools) icon on the Trak screen. An example statement is to the right:



A Practitioner, C.S. 603-868-6470

Statement for: Mary Henderson Jan 8, 2011

Date	Transaction	Amount	Reduced	Total	Net Due
Aug 8, 2010	Invoice (Jul 13)	$20.00		$20.00	$20.00
Aug 8, 2010	Invoice (Aug 8)	$20.00		$20.00	$40.00
Jan 8, 2011	Payment	$40.00			$0.00

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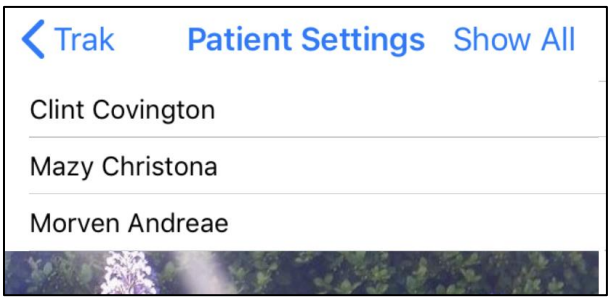
Patient Settings

An alternative navigation to the individual settings for a patient is through the Tools (wrench) icon on the Trak Screen. When pressed you are prompted with a list of all patients and must select one to get to their settings.



Tap the "Show All" button to show all the patients versus just those that have modified any setting. Tap the patient card and the patient setting edit screen appears.

Clean Contacts

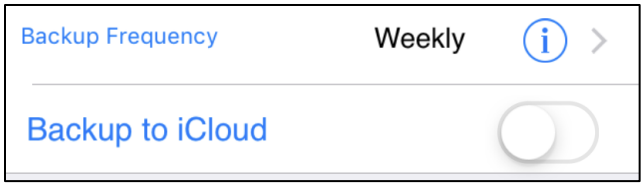
Use this sparingly—it attempts to remove duplicate contact ids and should be used if you seem to have a problem with patient names in the system after migrating to a new phone or other address book issue sometimes caused by system updates.

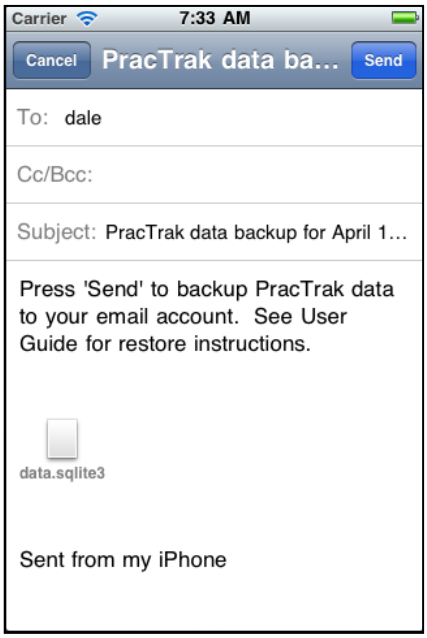
Backup and Restore

Backup and restore of data is very important to perform on a regular basis. It provides a way of saving your practice data so that if the phone is lost or damaged your data is not lost and can be restored to a new installation of *PracTrak*. It also lets you migrate your data to a new iPhone.

Backup settings

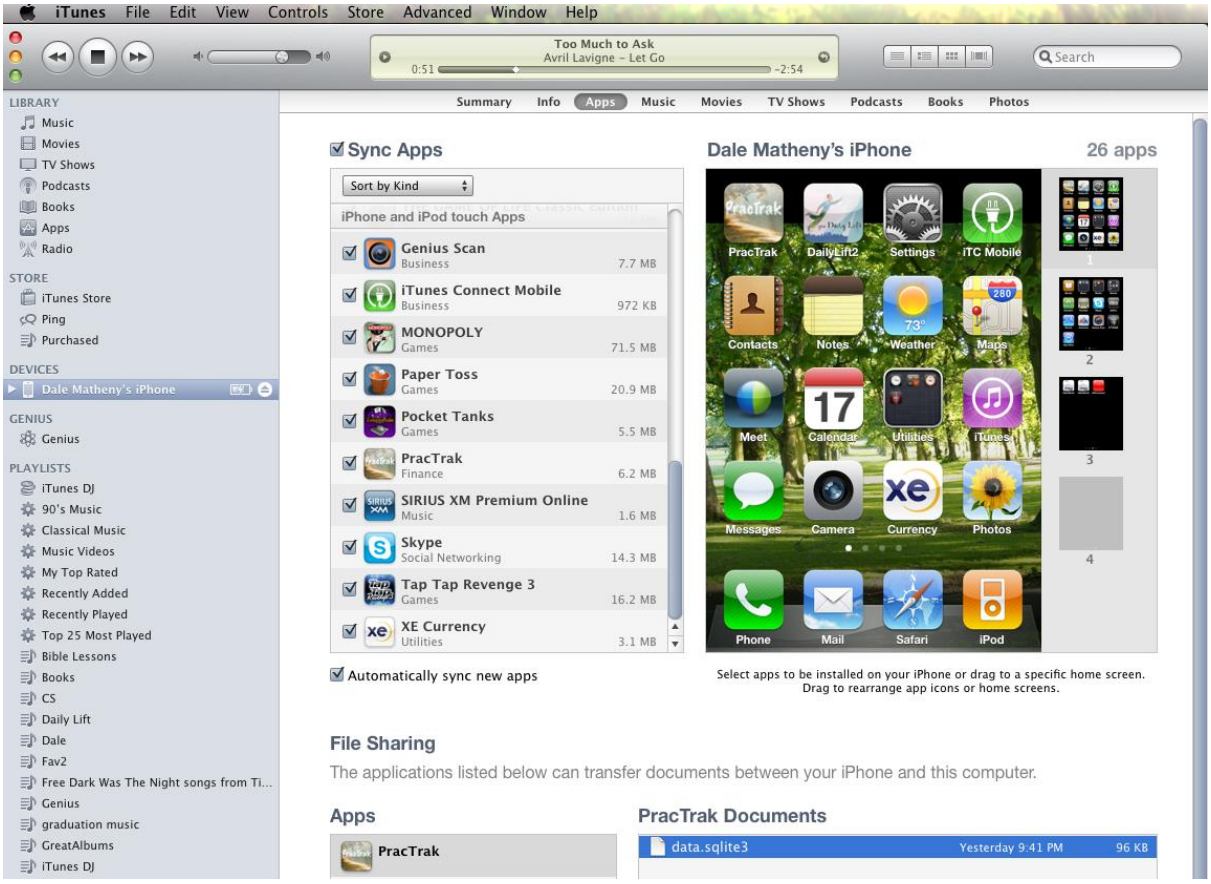
If you wish to backup to iCloud then turn "Backup to iCloud" setting on. If off then backups will occur using email—the data.sqlite3 database will be emailed to you regularly. The backup frequency can be set to: Off, Monthly, Weekly, or Daily in the PracTrak Settings screen. In Settings, look for "System" group and the following options:



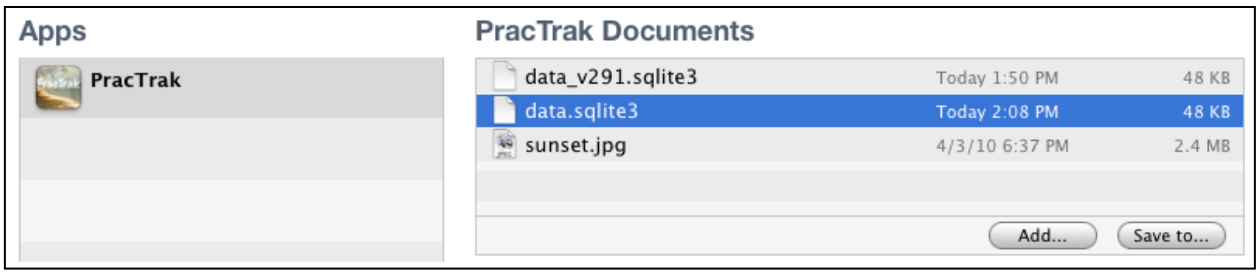


Backup Manually

To backup manually you can go to the tools icon on the Trak screen (the icon with the wrench on it) and press “Backup Now” or use iTunes to backup the data with your iPhone or iPad connected to iTunes. To backup using iTunes go into iTunes with your phone connected. Click on the Apps tab at the top as shown below:



Click on the *PracTrak* icon in the Apps section under File Sharing and then click on the data.sqlite3 file on the right under “PracTrak Documents”. THIS FILE IS ALL OF YOUR DATA.



Use the "Save to…" icon to save the file to a safe place on your computer. This is your backup. If you keep multiple copies of this file it is ok to rename the file(s) but to restore the file it must be named data.sqlite3.

In addition, a paper backup approach is to email yourself a monthly summary statement which lists all of your patients and treatment days.

Restoring a Backup

You can restore a backup from iCloud using the "Restore or Activate Device" option from the Tools menu (wrench icon from Trak screen). When you press this option you may have to *select the option twice* as there seems to be a slight quirk in the iCloud copy data function – it does work – just select the option, wait a few seconds and select it again. The restore will happen immediately and your data in the app will be restored to the date selected.

To restore a backup that was emailed note that a data.sqlite3 data file was attached to your email. This file holds ALL of your treatment and invoice data for PracTrak. To restore, you must connect your iPhone or iPad to your computer which should be running iTunes. From within the iTunes application, click on your device and then on the 'Apps' tab at the top of iTunes. You restore by copying the backup data.sqlite3 file into the file sharing documents area for PracTrak. You should copy the data file from the email version you wish to restore from to your desktop then drag or copy into the file sharing area using the Add button provided. After copying to the file sharing area in iTunes, re-open PracTrak on your device and all of your patient and invoice data will be present.

Printer Setup

iPhone and iPad iOS 4.2.1 release supports printing via AirPrint. See the article at the link below to set up any printer that is available from your desktop or laptop computer. The software they describe is a free approach to setting up your printer and can be downloaded from their site:

http://netputing.com/airprintactivator/

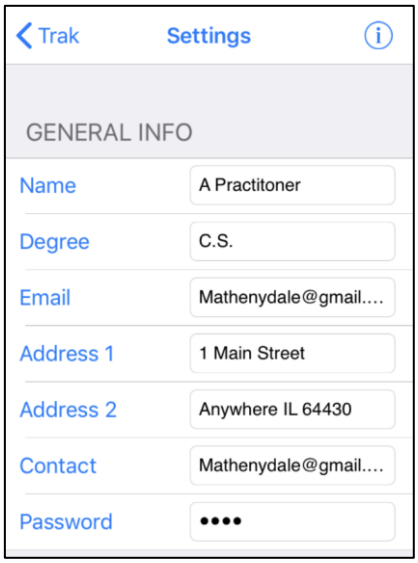
You will need to have Wi-Fi feature ON on your iPhone (which also assumes you have a Wi-Fi network with your Mac on it). Wi-Fi is configured from your iPhone Settings app. You also need to set the "Share this printer on a network" option to ON for each printer you want to use. This setting is found in the Mac Print & Fax program available from the System Preferences application on your computer.

Settings

Settings are set within the application from the 'Gear' icon on the Trak screen. The sections and parameters available are described below. Tap the gear icon as shown below to enter Settings:

General

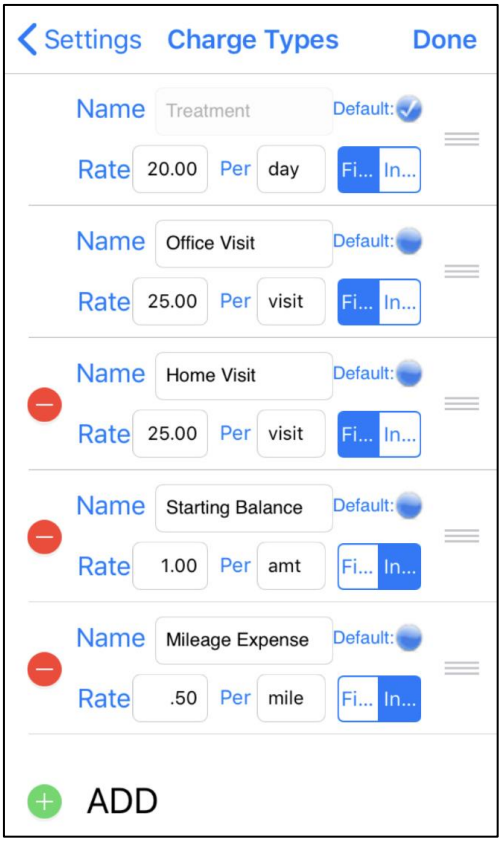
The first set of Settings for PracTrak are General Info. The Name, Degree, and Email are filled in when you first run PracTrak but may be modified here if required. Also ensure that the address 1, address 2 and contact fields are filled in as these are used in the letterhead of your invoices.



Password Change

Your password may also be modified within the Settings General screen. Type the password you wish (and *remember* the password you type). **You may type capital NONE in this field to turn off the password feature.** If you do forget the password email Ray of Light support group at mathenydale@gmail.com.

Treatments Charge Types



Additional charge types can be very useful for setting alternate charges including expenses. The Charge Types screen is entered by taping Charge Types (i) > icon from the Settings screen.

Each charge type is displayed in its own 'card' as shown to the left. Notice that you may modify the name, rate and unit of work as well as whether the charge is a fixed or variable (input) rate. See the description of these fields below.

Rate Changes

Note that any rate change will be applied to all non-closed invoices when you leave the Settings screen and go back to the Trak screen. This implies that you should only change your treatment rate when you are ready to have it change all existing invoices that haven't been closed, perhaps at the beginning of a new billing month.

Adding Charge Types

Add a new charge type by tapping the (+) icon next to the ADD word at the bottom of the screen.

Global Default Charge Type

To make one charge the default that is used whenever you add a treatment for a patient tap the blue circle next to the "Default" header.

Deleting Charge Types

Charge types may be deleted if they are not used in any treatment. Once they are used in one or more treatments they cannot be removed. Press the red button next to the type and then tap the 'delete' button that appears to remove the charge type. A Red button will not appear next to types that cannot be removed.

Charge Type Fields

Name	The name of the charge type. The name should be unique if possible. If necessary, the name can repeat. For instance, an alternate treatment charge/rate can be entered as a charge type with name "Treatment".
Daily Rate	Rate in current currency.
Unit	Unit of measure. Ex: day, visit, mile. This label appears on the invoice and within the application to indicate what the rate applies to.
Type	Fixed: A fixed amount, the rate, per treatment. Input: A variable amount that the user must enter. Total charge will be rate*input quantity. Example of an input charge type is mileage where the user must key in the number of miles driven.

Hourly Rate

To enter a treatment type with an hourly rate set the type to "Input" and set the hourly rate. When the treatment is entered you will need to go to Treatment Detail screen and enter the number of hours of treatment. This rate can be used for the default Treatment charge type or by adding a new charge type. Note that a new treatment type can still be called "Treatment" but simply have an hourly rate.

Variable Rate

A rate that changes depending on the number of days of treatment is supported. You type in the rates and the number of days they are valid for in the rate field using the following format. Note that a maximum rate can be optionally specified with the 'max' keyword as shown below.

[Rate] , [Number of days valid] , [2nd Rate] , [Number of Days valid] , … , ;max=[number]

Example:

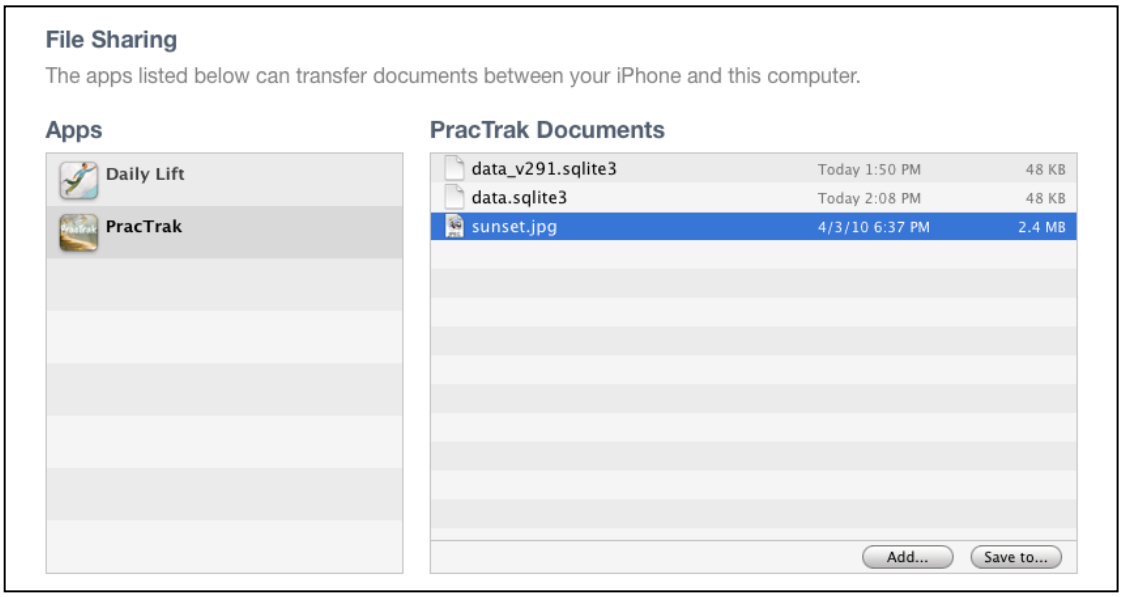
20,1,15,2,10,100;max=350

This means that it is a charge of $20 for the first day, $15 for the next two days, $10 for any more days than three with a maximum monthly charge of $350.

Background

The background picture option allows you to specify your own picture as the background for the Patient and Trak screens. Key in the picture name including the extension .jpg or .png.

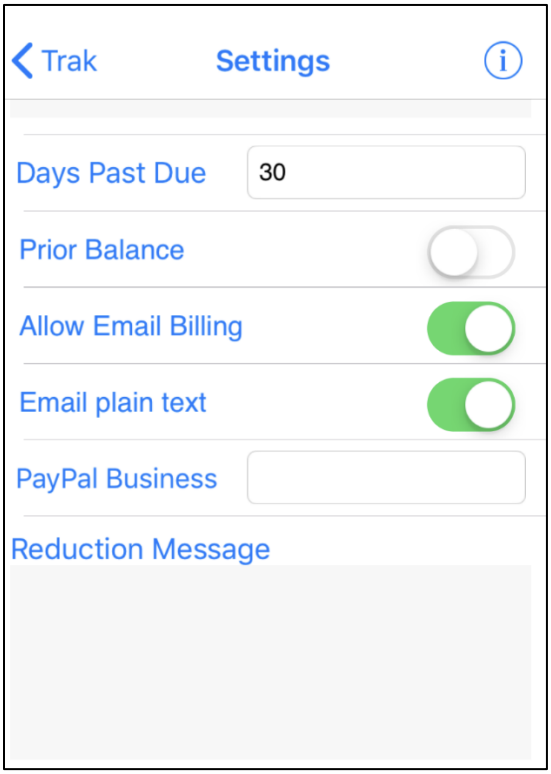
You must also copy the picture to your iPhone or iPad. To do this, go into iTunes and click Device and then the Apps folder on the top right tabs. Notice the File Sharing area appears as shown below. Click on the "PracTrak" app on the left and then use the Add button in the lower right to find and add the image. Sync the phone to get the picture to load onto the phone after adding the image to the file sharing area.

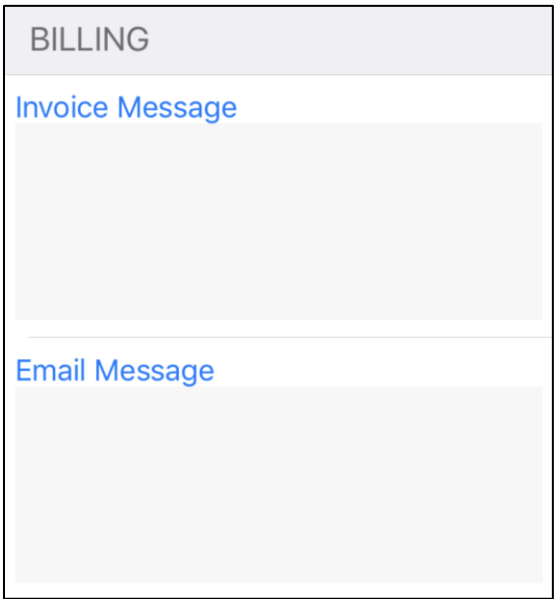


Pictures should be 100-400KB in size as they will make the application sluggish if they are larger files.

Billing Settings

The billing options include messages that are placed on the invoices, and other billing options as described below.

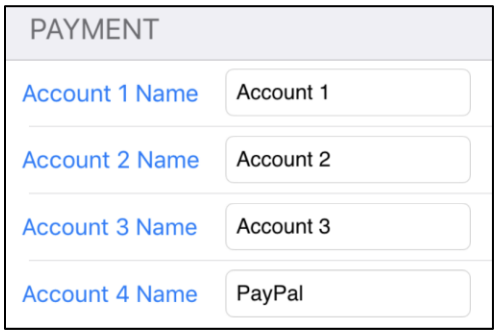




Invoice Message	Place a message here that you want to appear at the bottom of every invoice.
Email Message	A standard message that will appear in the text of an email that is sent directly to a patient.
Days Past Due Filter	The number of days an account can be past due before it shows up in the Past Due screen.
Prior Balance	Set to ON to put any prior unpaid balance on the invoice. OFF will keep any unpaid balance off of every invoice.
Allow email billing	ON (default) if you want to allow the ability to send invoices directly to patients, OFF if you want to prohibit this.
Email plain text	Add a plain text version of the invoice in the email of the invoice to the patient. This is in addition to the PDF attachment of the invoice.
PayPal Business	Put your PayPal business email address here to turn on the PayPal button on the invoice and enable PayPal billing. You must register with PayPal as a business before this option can be used.
Reduction Message	Message displayed at the bottom of the invoice when a reduction has been applied to the invoice.

Payment Settings

Set the account names within the Settings options. Up to four accounts may be used and named. The account is to help label your payment with relevant information you may need.



International Settings

PracTrak supports one international setting for its currency and date format. It will not convert from one to multiple currencies but it will work within the one selected currency.

To set up an International setting, go to the iPhone settings General and set the Date & Time, Keyboard, and Language & Region as shown to the right.