PracTrac 5.3

Financial Management Software for
Christian Science Practitioners

App Tutorial

PracTrac Tutorial

Getting Started

1. Getting Started
2. Treatment List
3. Invoicing
4. Payments and Patient Statement
5. Financial Management

Overview

PracTrac is an easy to use mobile app that provides comprehensive financial management for Christian Science Practitioners including

- Daily Treatment list of patients
- Automated invoice creation
- Payment tracking and patient Statements
- Income statements including expenses and revenue tracking
- App is available on mobile or web access and data is stored securely for you 'in the cloud' online

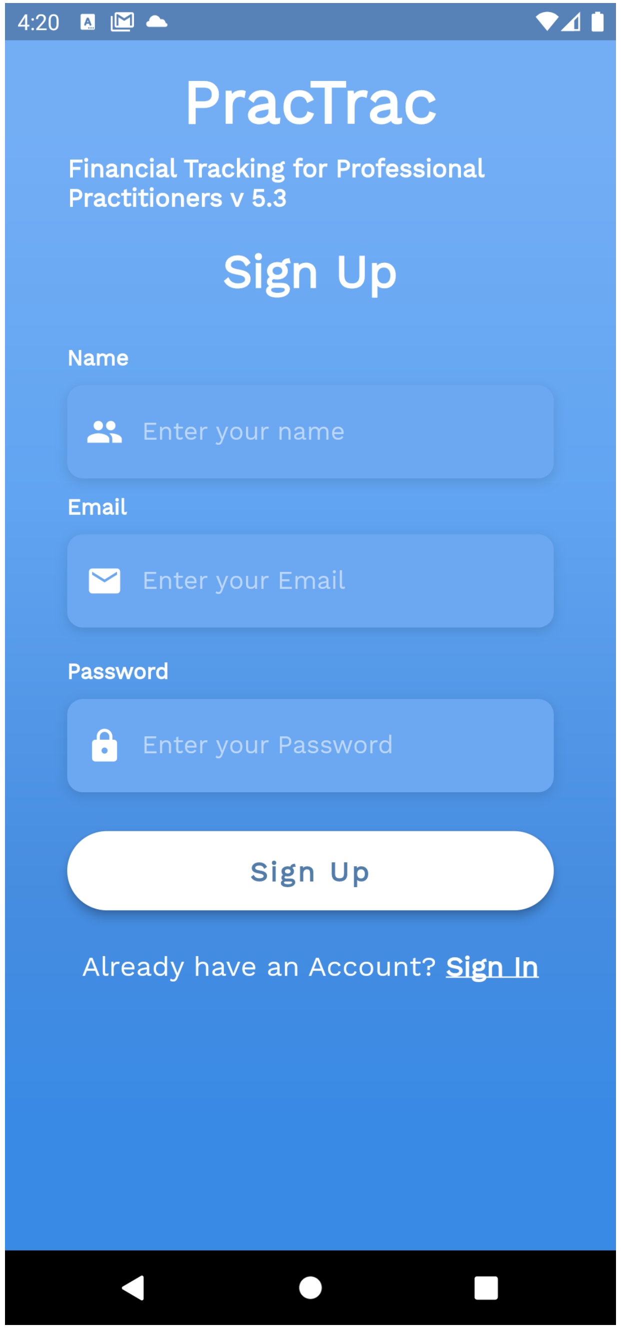
Getting the App

Get the iOS or Android mobile app from the Apple App Store or Google Play Store by searching for *PracTrac*

OR

Use the WEB by typing: *practrac.app* as the URL in a browser

Signing up



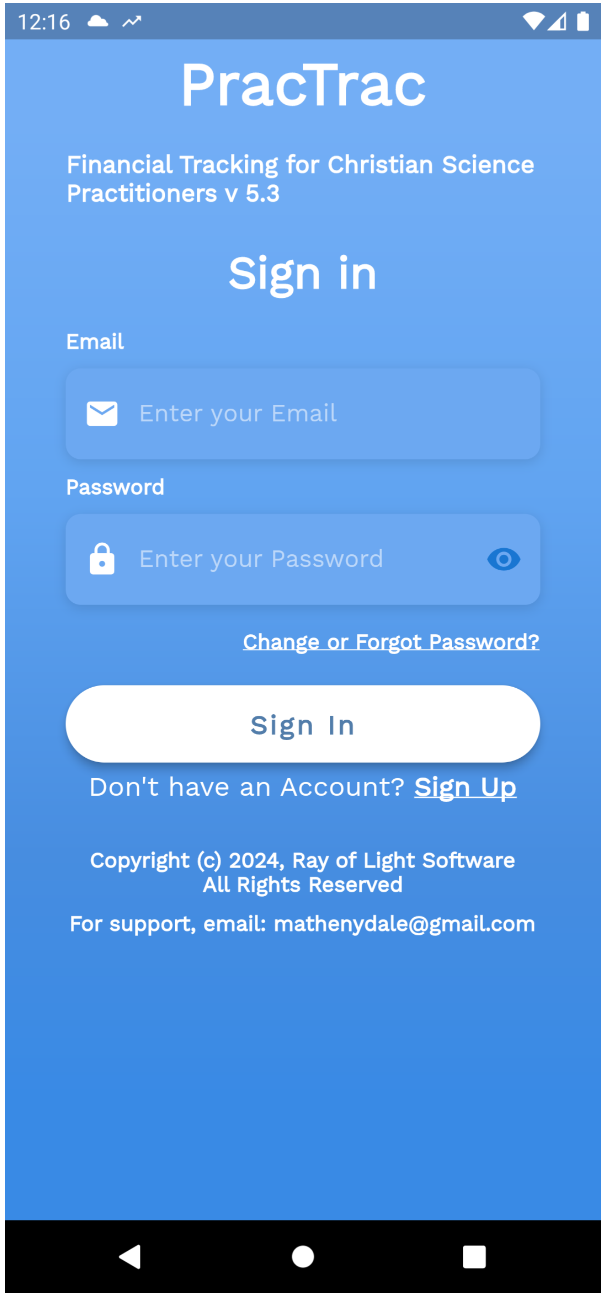
1. Go to web browser and type: practrac.app or open mobile app

2. Click the **Sign Up** button from the Sign In screen and fill in the form to create an account.

1. An authorization email will be sent to you (check spam folder if needed).

1. Click the link in the authorization email and then you can sign into the app.

Signing in



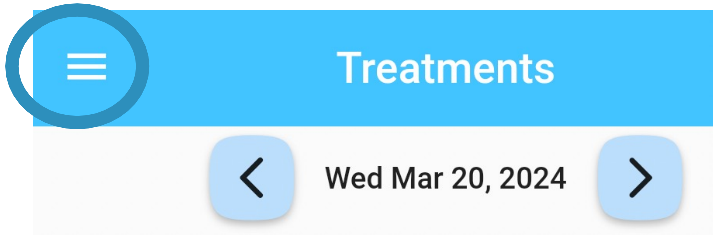
Open the app and type your email and the your password. Press “Sign In” button.

Subscription Payment

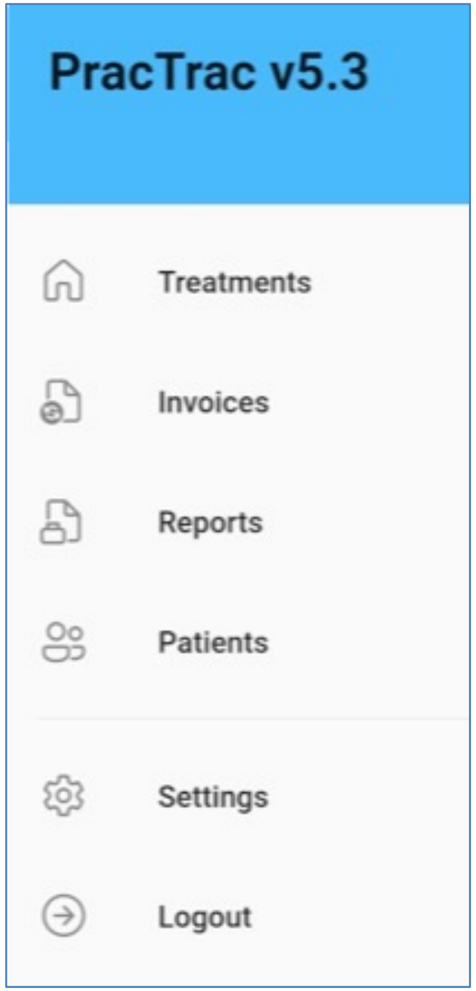
PracTrac is offered at $50/year subscription which pays for

- Web, Android, and iOS access to PracTrac apps
- Online data storage and backup
- Technical Support
- Free updates and enhancements

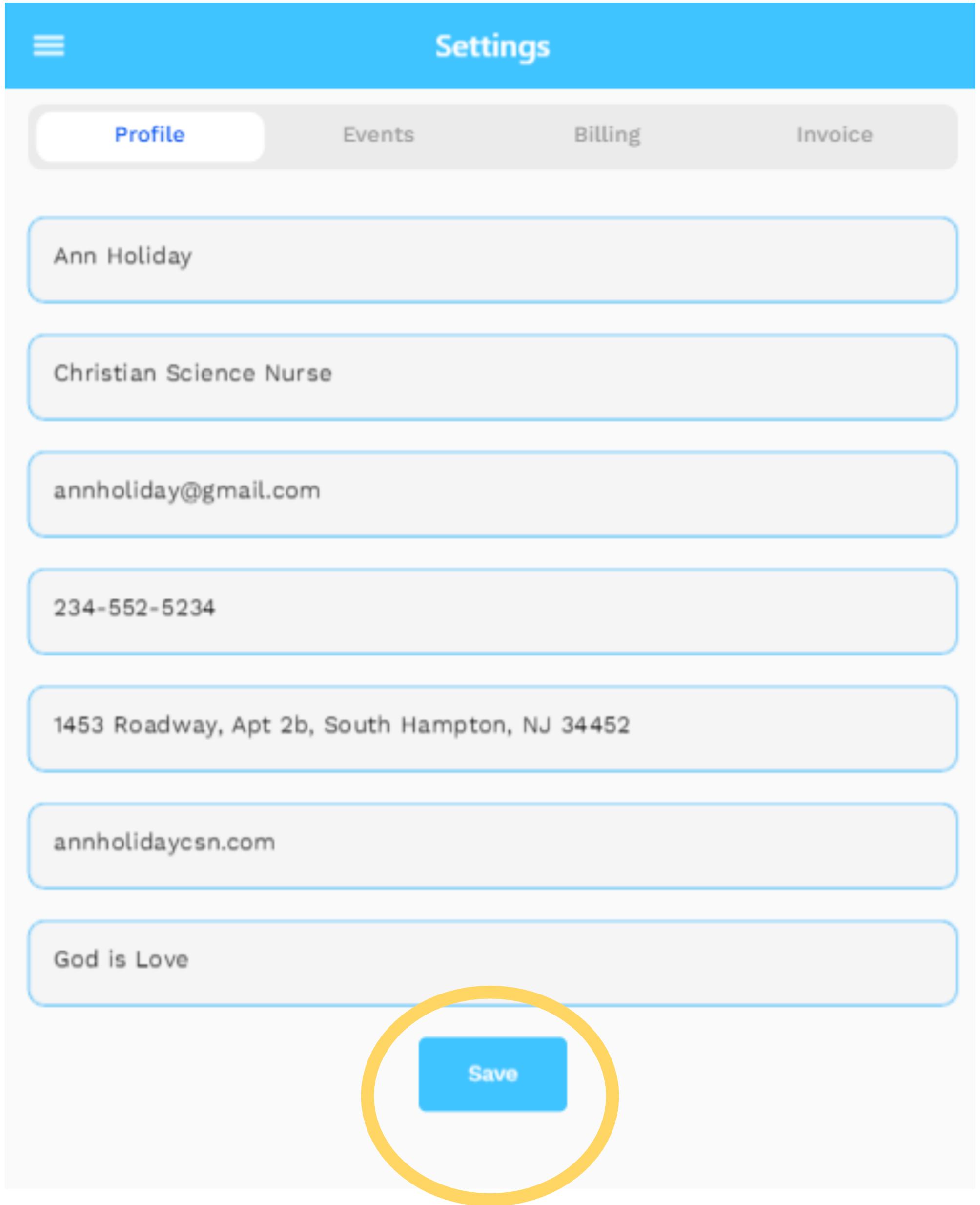
Navigating PracTrac



- Tap the Top Left 3-bar icon to show the side menu.
- Tap *one of the five screens in the app, such as Treatments*



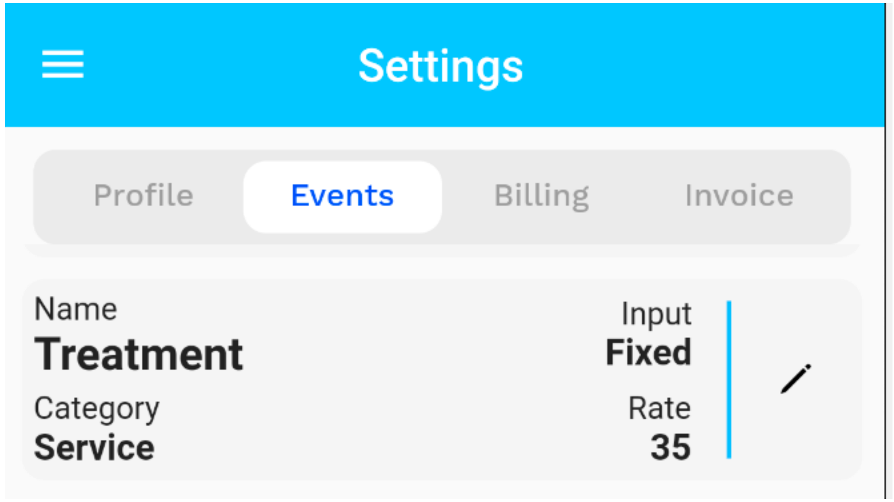
Setup:
User Profile
Settings Screen



Navigate to the Settings Screen

Enter contact information on Profile tab and press Save button

Setup: Checking rates

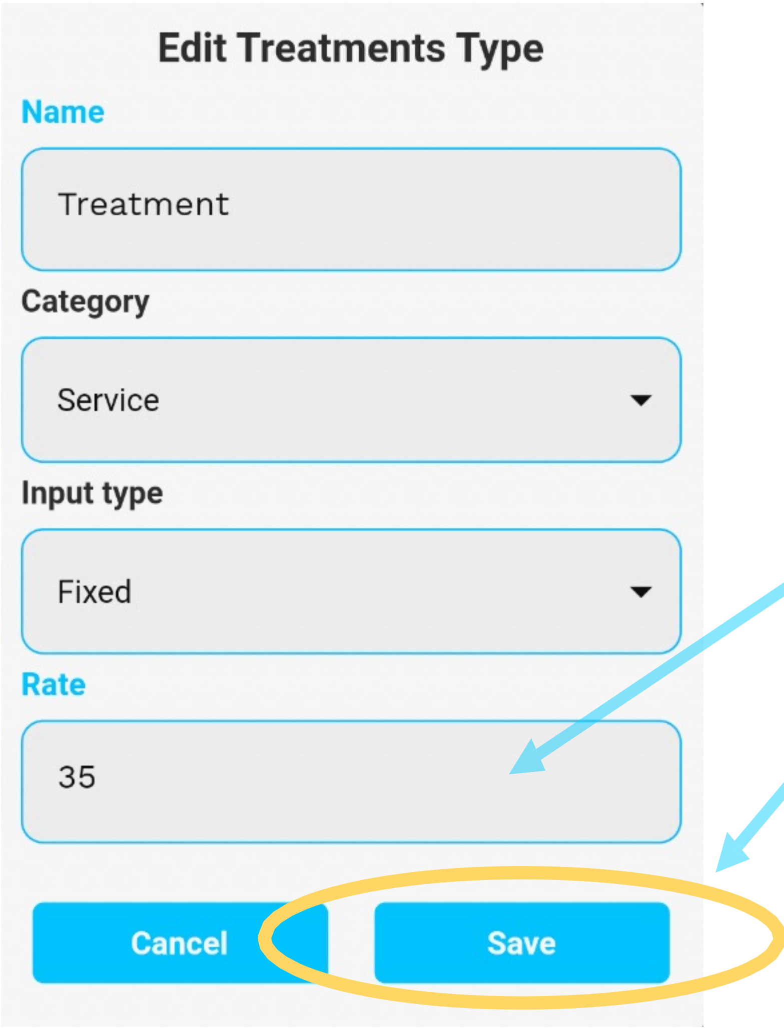


On start up, user should review treatment rates and adjust these for their practice

The events settings screen lists all treatment and expense types that can be used in transactions. From here you can:

- Modify rates
- Enter new custom expense or treatment types

Modifying a rate for a treatment



1. Scroll down to the event you wish to modify and click the pencil icon (edit) which is on the right side of the event row.
2. A dialog appears. Modify the rate and press Save.

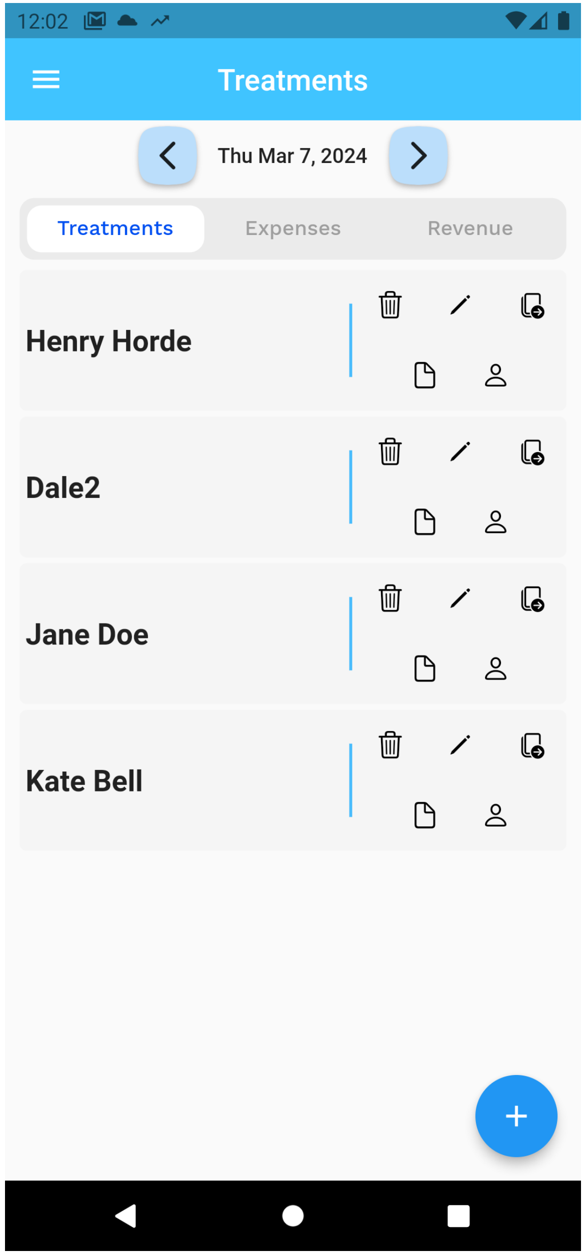
Note that all rate modifications take effect at time of change for all future transactions – no past transactions are affected

PracTrac Tutorial

Treatment List

The **Treatments** Screen

Every day you enter patients worked for in the Treatments screen



95% of time spent in app is on this screen. Once data is entered in this screen generation of invoices and reports can be done.

The Treatments screen is organized by day and three types of transactions: Services, Expenses, Revenue.

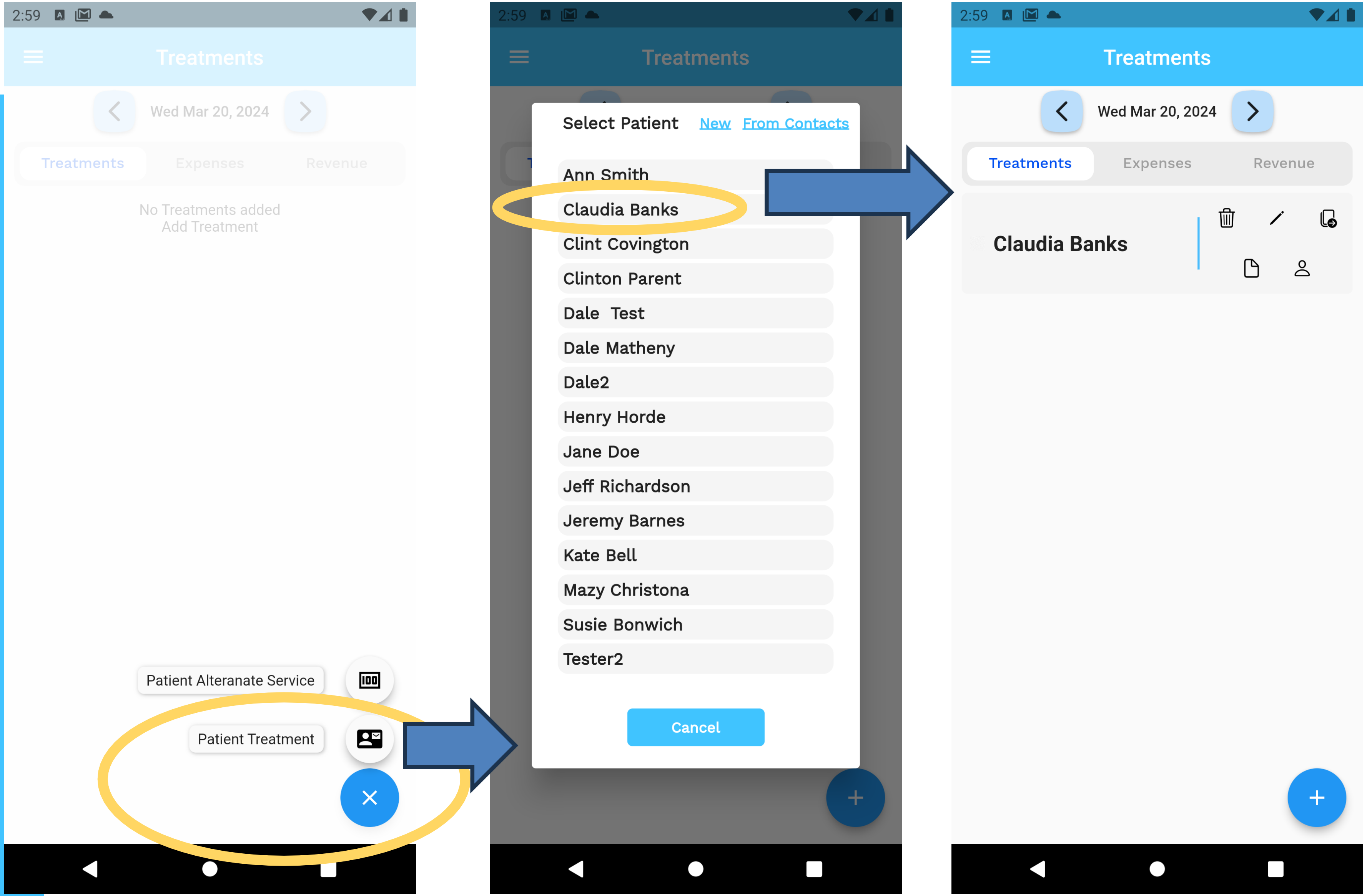
Actions

1. From *Treatments* tab, tap on blue + icon to add a patient treatment.

Tap on < > to go forward or back one day or tap on date to get calendar.

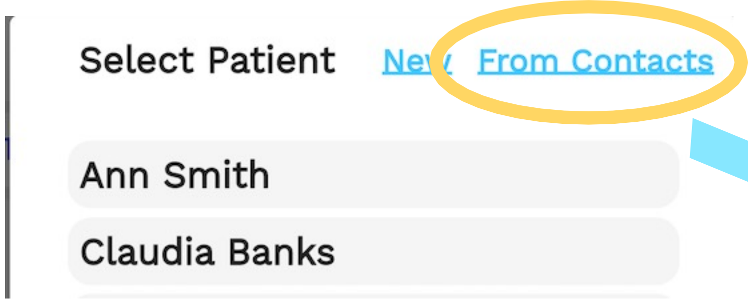
Tap on Treatments, Expenses, Revenue tabs to enter transactions for this category.

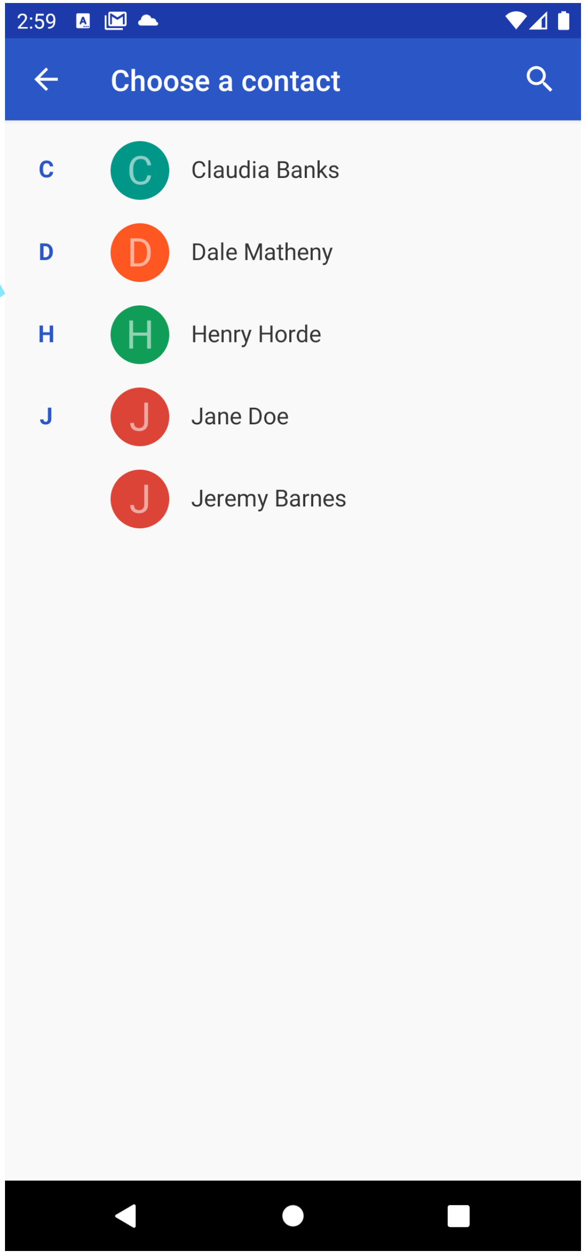
Add a patient treatment



1. Select day to add to then press blue + button and "Patient Treatment"
2. Select patient or "From contacts" to add a patient from contact list
3. Treatment appears in treatment list

Add a patient from contacts list or New

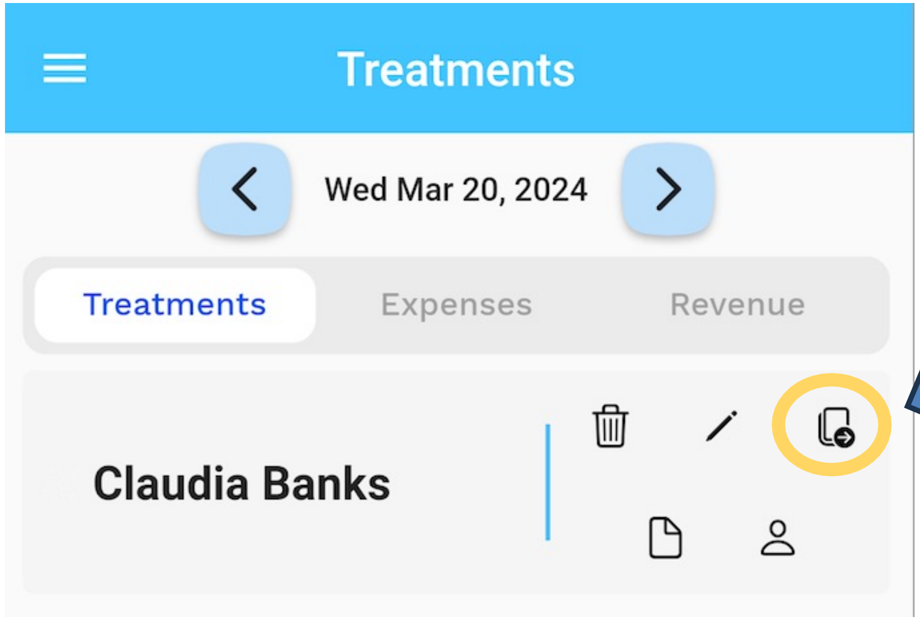




- Click *From Contacts* on mobile app to select existing contact and add to the application as a patient.
- Click *New* to add name, email, contact, address for a new patient in the dialog as shown above (right). Note that New option will not add patient to your device contact list, just to the patient list in PracTrac.

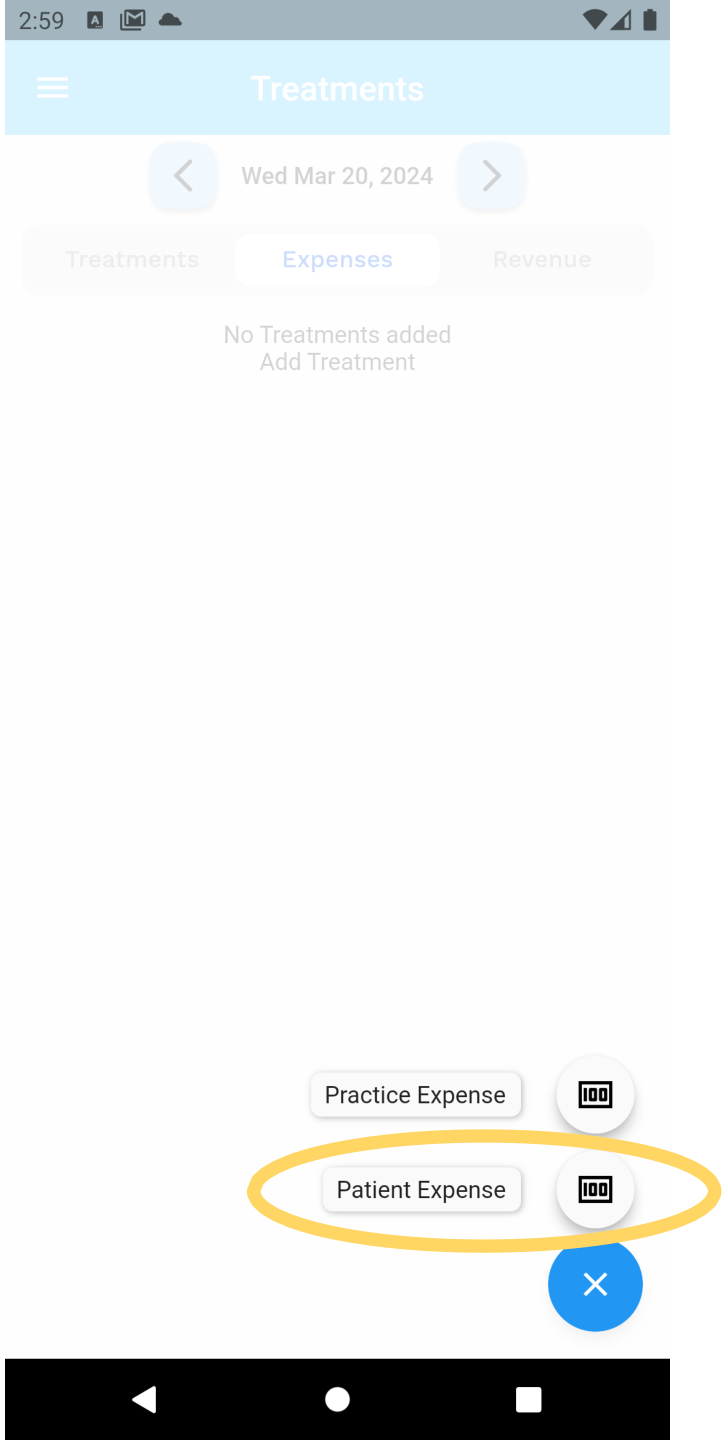
Icon Actions:

Delete, edit, Copy to next day, note, patient statement



Press the *Copy to Next Day* icon to copy same treatment to next day.

Adding Patient Expenses



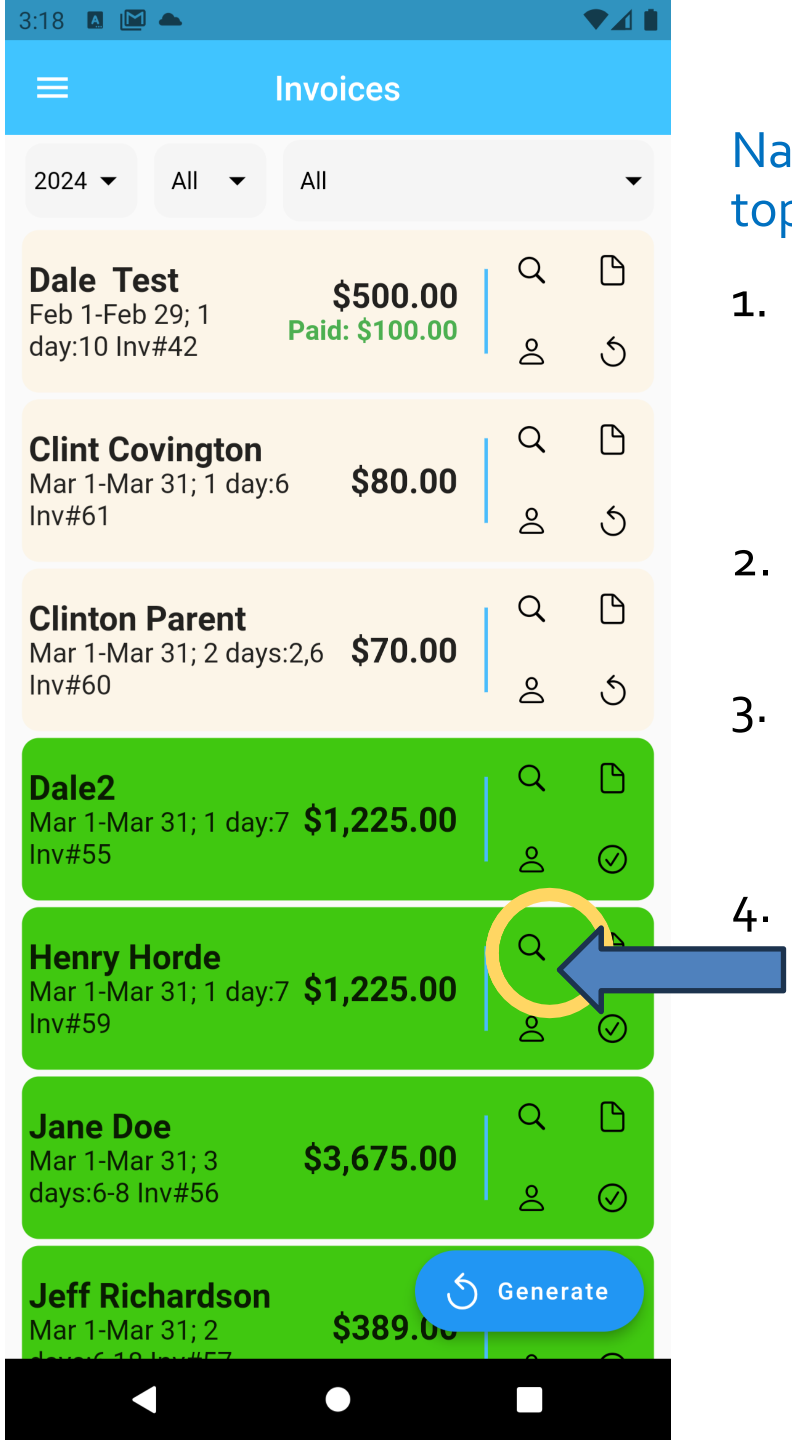
Patient expenses will appear as charges on patient's invoice.

1. Tap on the *Expenses* tab
2. Press the blue + button on bottom right
3. Tap *Patient Expense* and fill in the dialog then press Save

PracTrac Tutorial

Invoicing

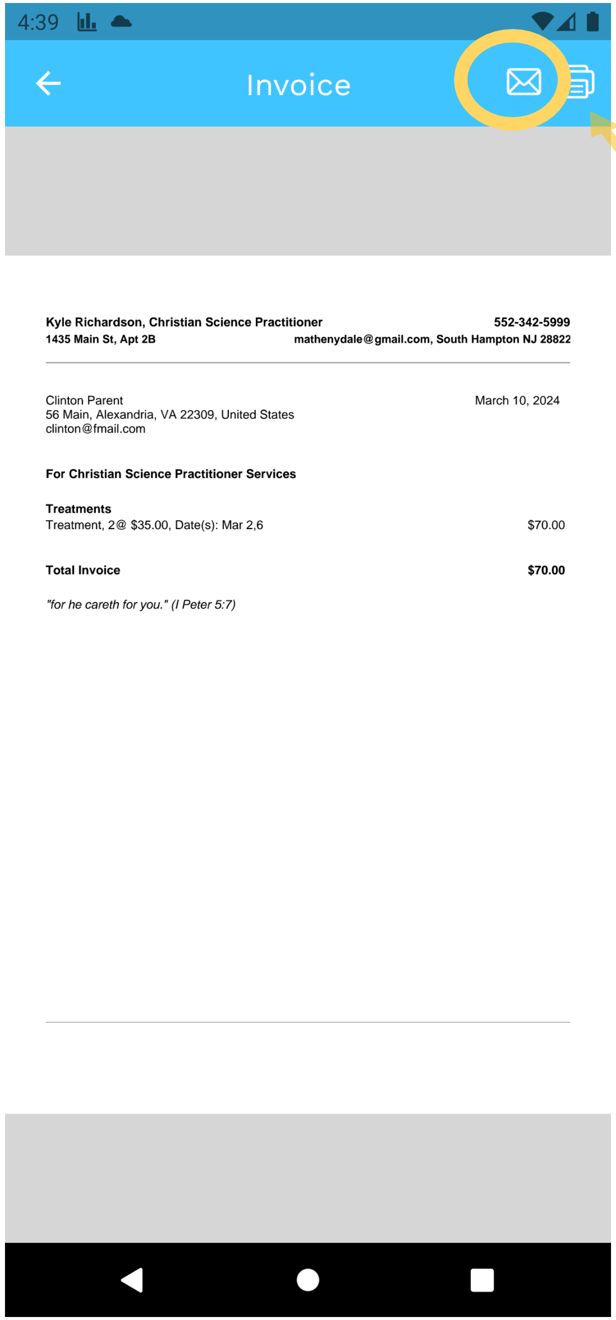
Invoices Screen



Navigate to Invoices screen via the top left triple bar icon

1. Press *Generate* to create new invoices. Generate generates all new treatments across *all months.*
2. Select month in the filter at the top of the screen.
3. New invoices have green background and closed invoices are orange.
4. View invoice by pressing the magnifying glass icon.

View Invoice

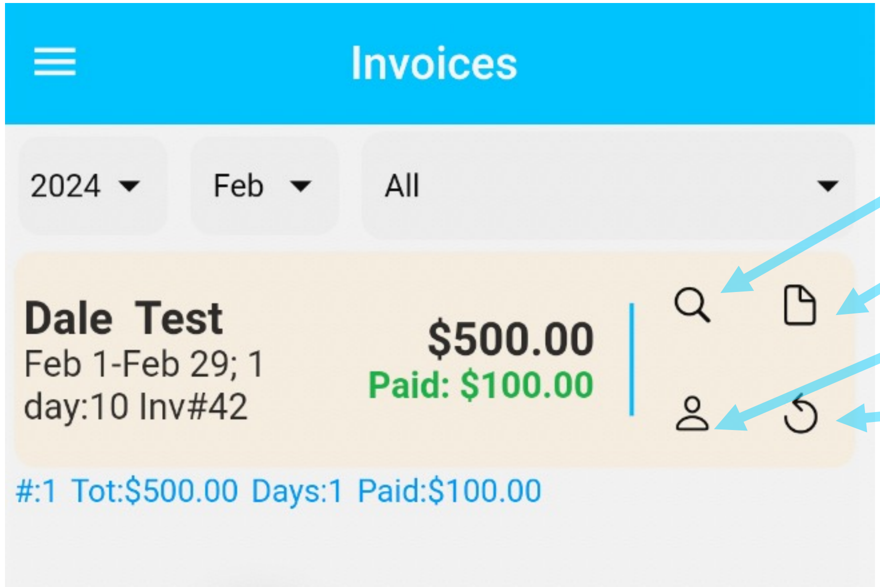


System automatically creates an invoice for billing period with all patient treatments.

1. Email invoice to patient by pressing the envelope icon.

* On web version the invoice is downloaded as a PDF file which must be opened. On Android and iPhone versions a built-in viewer is provided which allows email of invoice as a PDF attachment

Invoices Screen: Icons on each invoice



Icon Actions

View invoice

Add Note or reductions

Go to related patient statement

Close Invoice

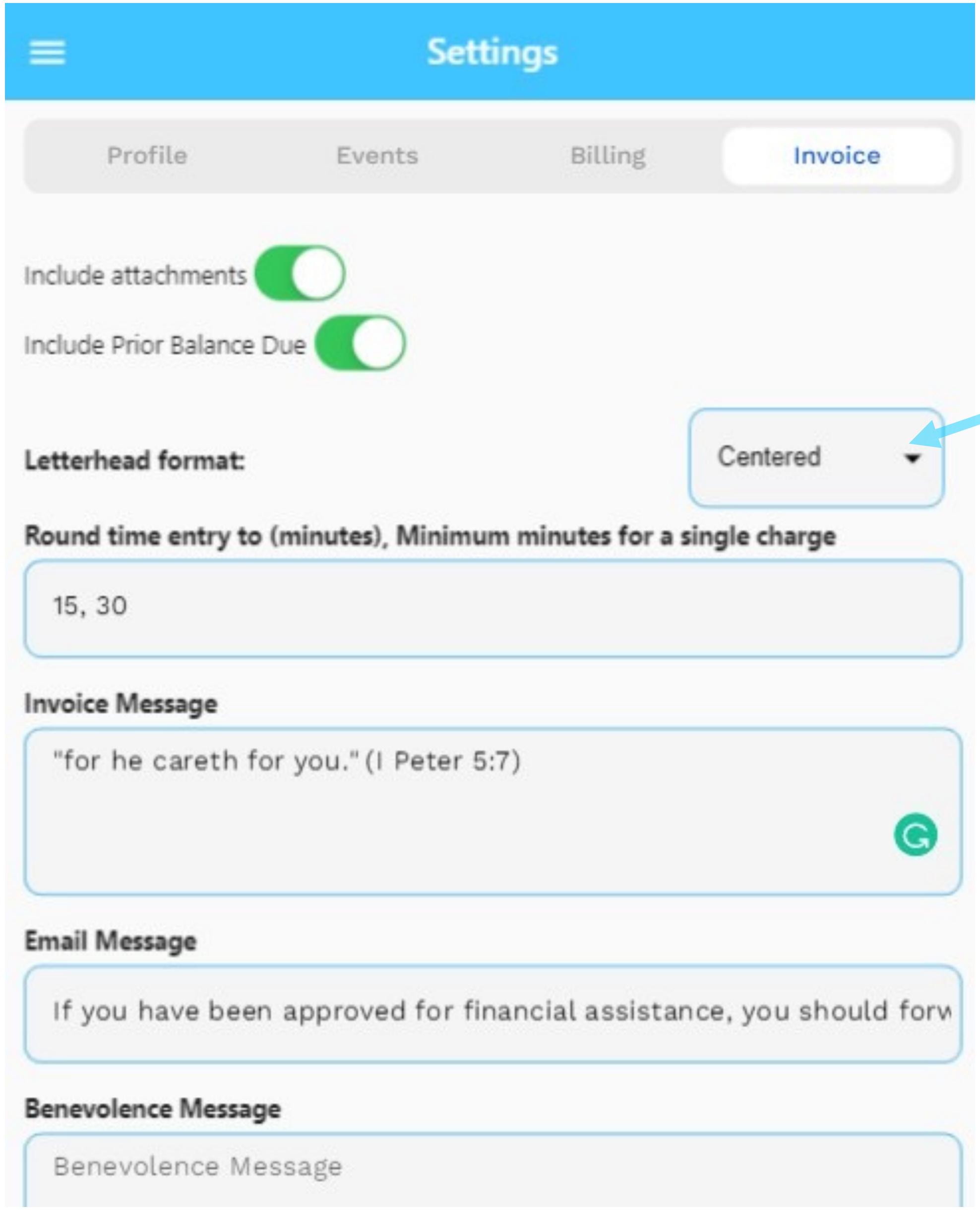
Totals of shown invoices: # of invoices, total amount invoiced, total # of days invoiced

CSNTrac

Advanced Invoicing

- Changing invoice format
- Changing billing frequency
- Adding notes
- Adding a reduction amount

Modifying invoice format

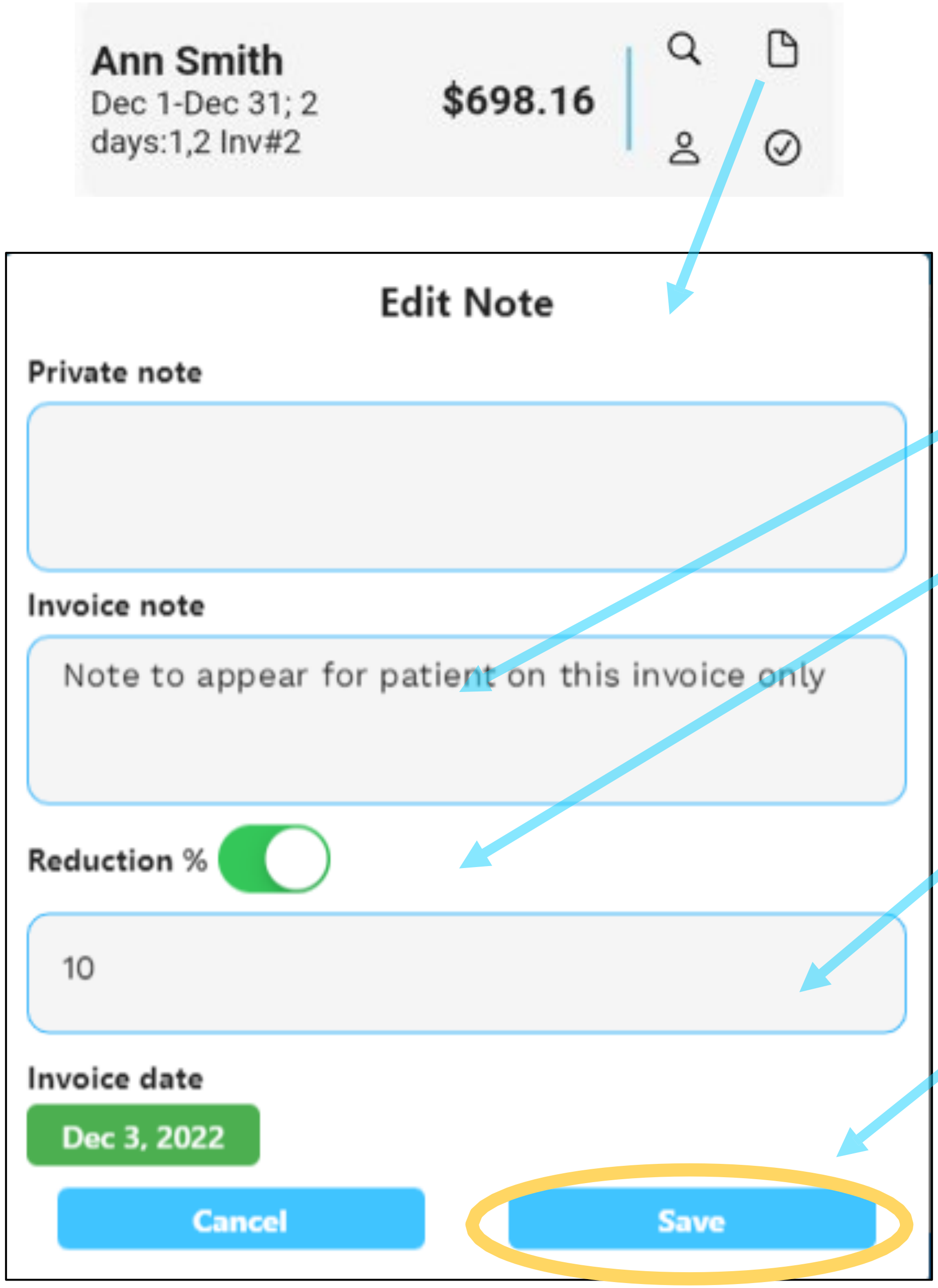


Navigate to Settings Screen, Invoice Tab

1. Turn on (or off) prior balances on an invoice
2. Set letterhead format to *Centered*

2. Set invoice message (shown on all invoices)
3. Set email message (shown on all invoice emails)
4. Set discount message
5. Press *Save*

Adding a note or a discount amount (or %) to a specific invoice



From any invoice row on the invoices new or historical screens you can:

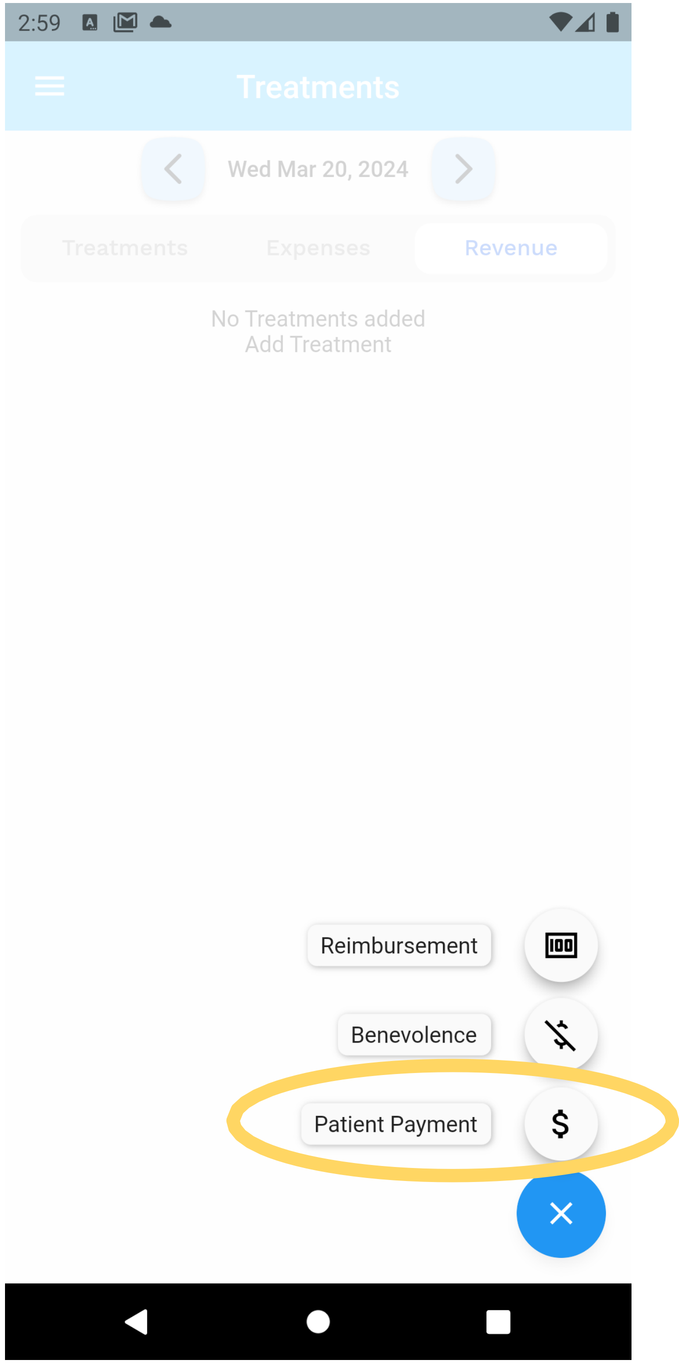
1. Select the note icon.
2. Set invoice note
3. Set benevolence % (slider is ON) or $ amount (slider is OFF)
4. Fill in benevolence % amount or $ amount that will be deducted from the invoice (10%)
5. Press *Save*

PracTrac Tutorial

Payments and Patient Statement

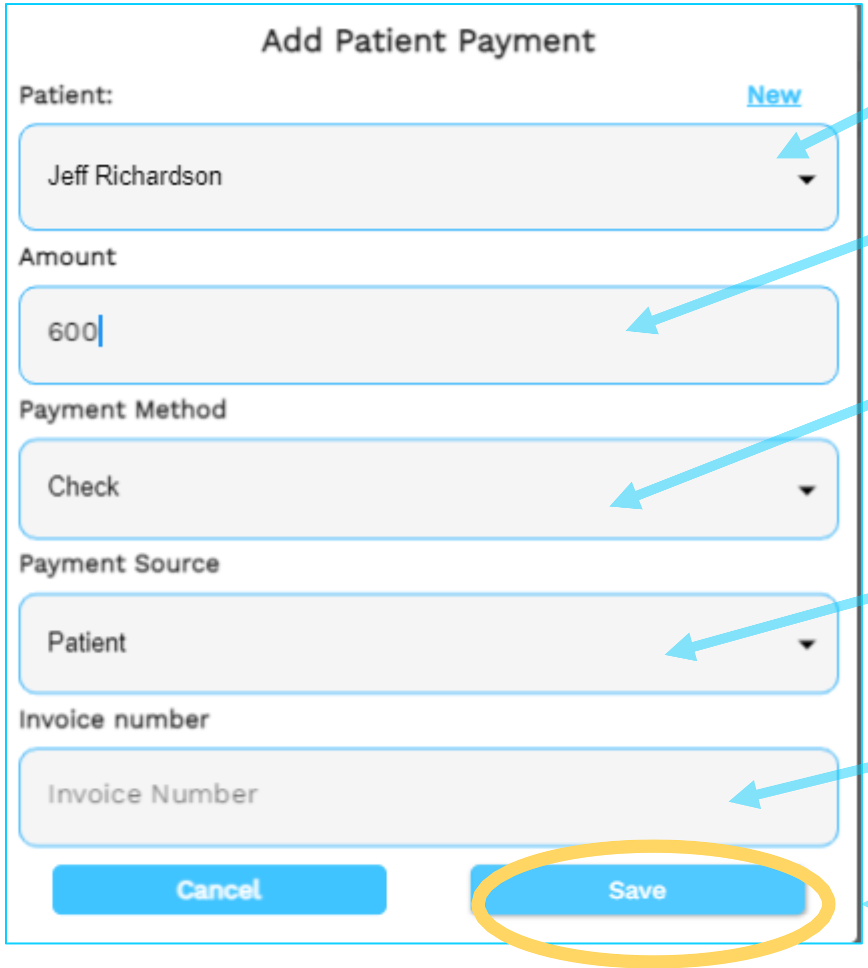
1. Getting Started
2. Patient Services and Expenses
3. Invoicing
4. **Payments and Patient Statement**
5. Financial Management

Revenue Entry



1. Go to *Transactions*, *Revenue* tab
2. Click blue + icon
3. Select *Patient Payment* to enter patient check sent to you

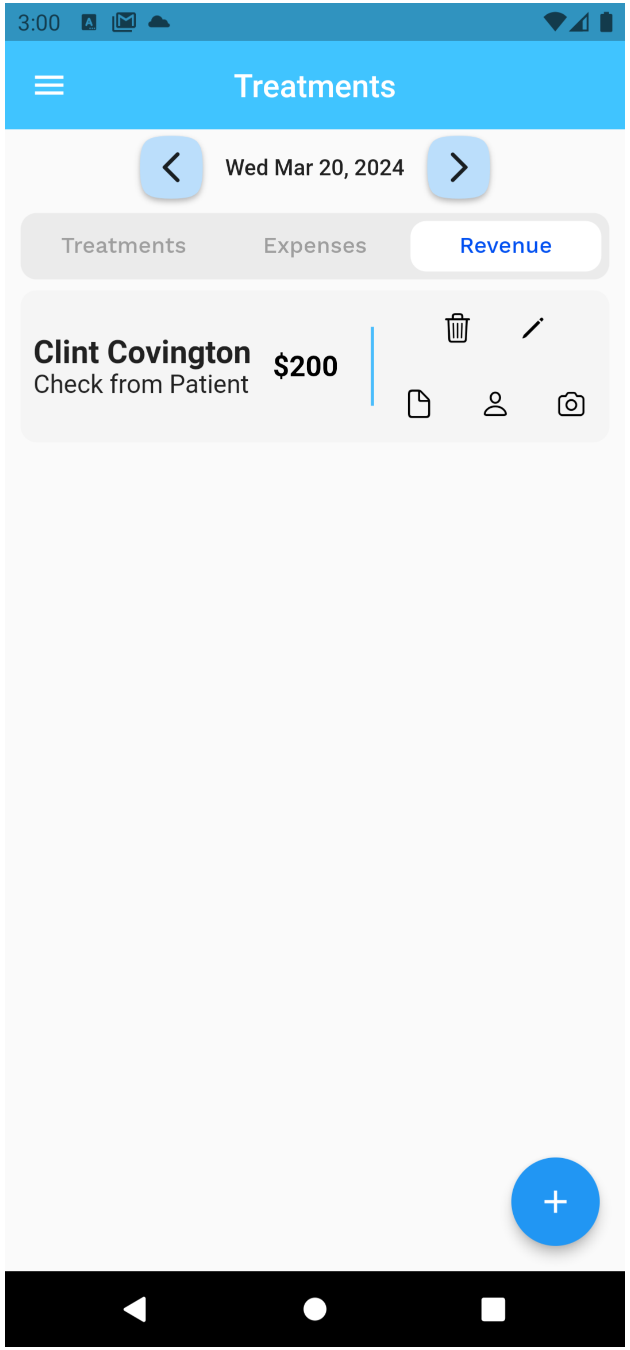
Patient Payment Entry



1. Select patient
2. Enter payment amount
3. Enter method such as Check, PayPal, Direct Deposit
4. Enter source: Patient, NFCSN, Branch Church, etc.
5. Enter invoice number if you have it. This will track the payment directly to that invoice.
6. Tap *Save*

View Patient Payment Entry

These payments will be used in Patient Statements to track payment of invoices and revenue in your Financial Report



Actions

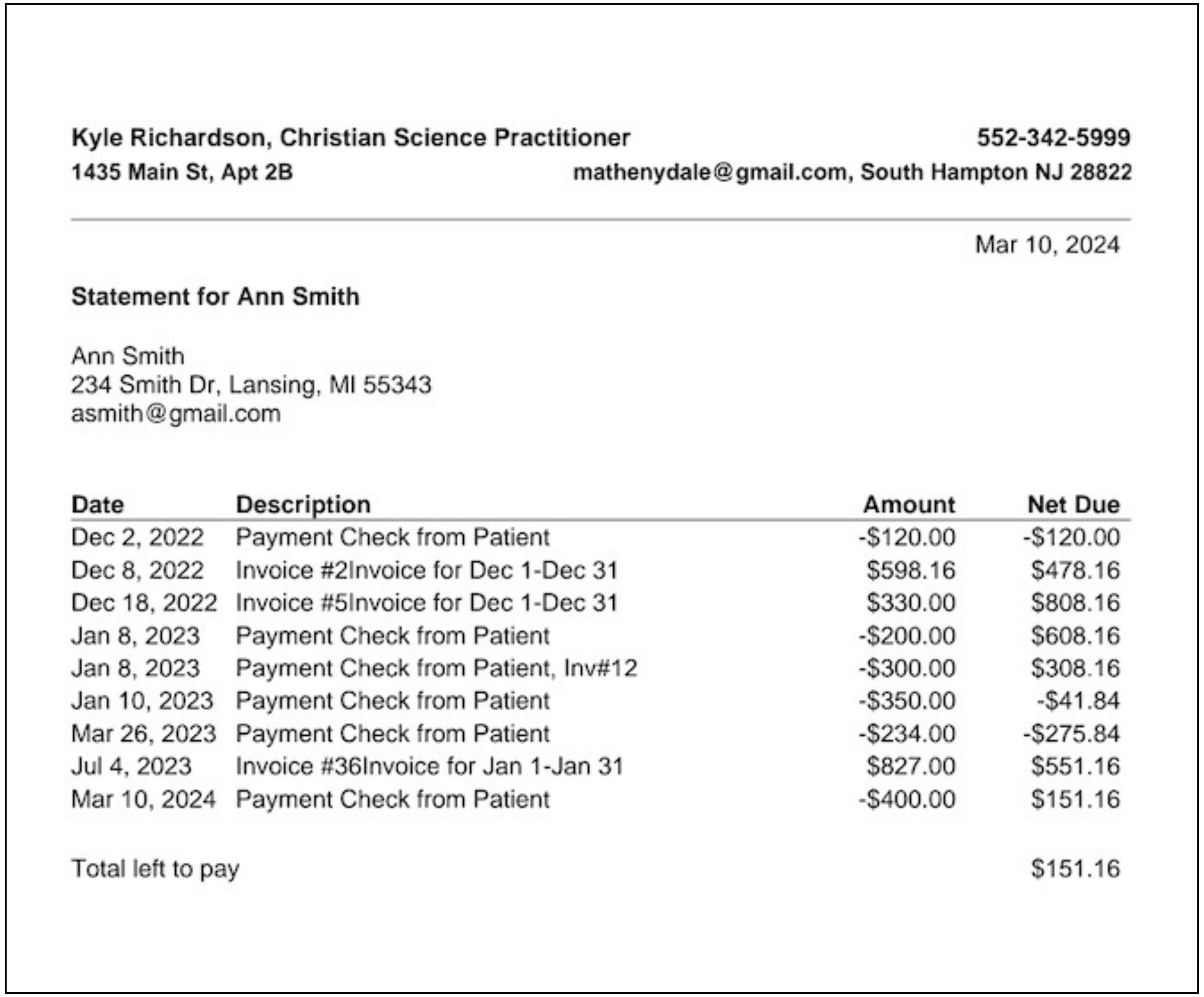
Delete, edit, note, patient statement, check image capture

CSNTrac

Patient Statement

SCENARIO: YOU NEED TO REVIEW A PATIENT'S PAYMENT HISTORY

Patient Statement



Kyle Richardson, Christian Science Practitioner **552-342-5999**
1435 Main St, Apt 2B **mathenydale@gmail.com, South Hampton NJ 28822**

Mar 10, 2024

Statement for Ann Smith

Ann Smith
234 Smith Dr, Lansing, MI 55343
asmith@gmail.com

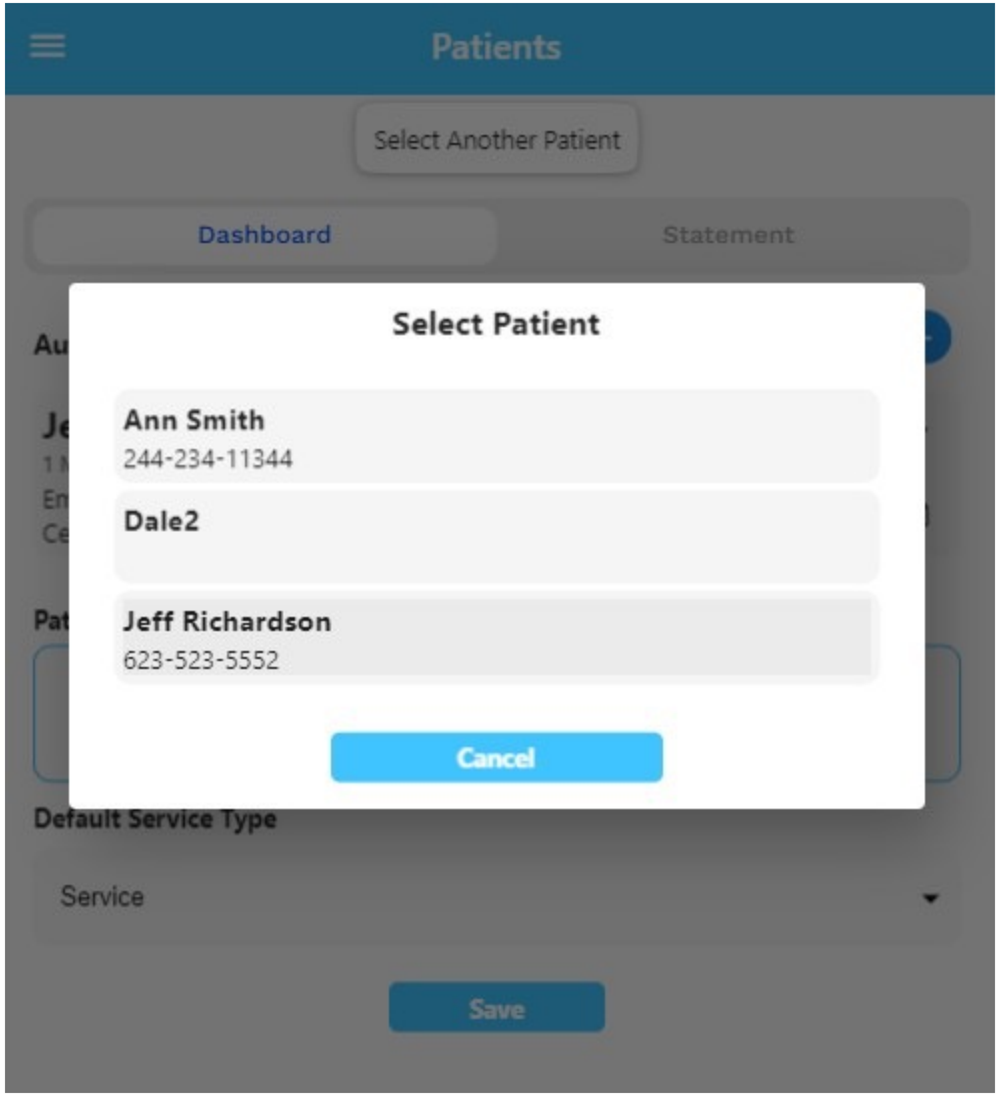
Date	Description	Amount	Net Due
Dec 2, 2022	Payment Check from Patient	-$120.00	-$120.00
Dec 8, 2022	Invoice #2Invoice for Dec 1-Dec 31	$598.16	$478.16
Dec 18, 2022	Invoice #5Invoice for Dec 1-Dec 31	$330.00	$808.16
Jan 8, 2023	Payment Check from Patient	-$200.00	$608.16
Jan 8, 2023	Payment Check from Patient, Inv#12	-$300.00	$308.16
Jan 10, 2023	Payment Check from Patient	-$350.00	-$41.84
Mar 26, 2023	Payment Check from Patient	-$234.00	-$275.84
Jul 4, 2023	Invoice #36Invoice for Jan 1-Jan 31	$827.00	$551.16
Mar 10, 2024	Payment Check from Patient	-$400.00	$151.16

Total left to pay $151.16

To get to Patient Statement tap on patient icon from Treatments or Invoices screen or Patient Statement button on Patients screen after selecting a patient.

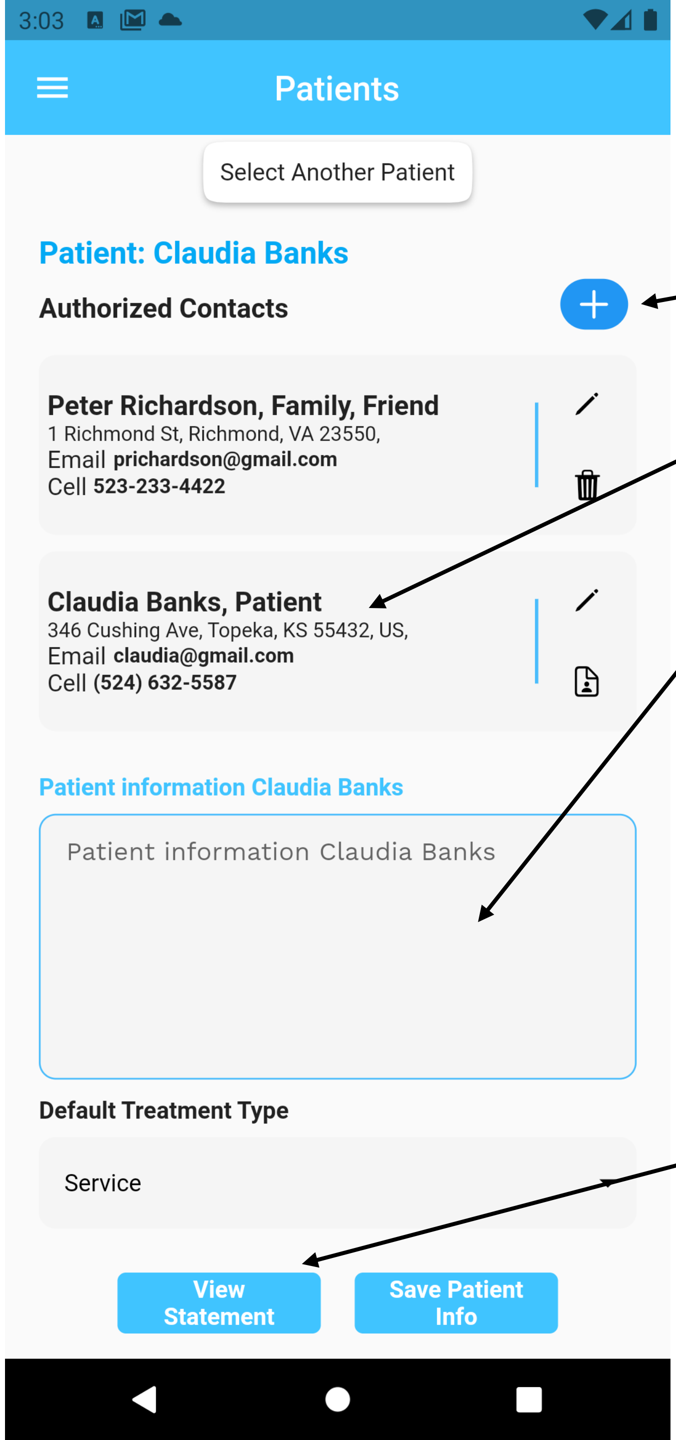
Statements show all of a patient's Invoices and payments over time. The total amount due is at the bottom of the report. Report may be emailed to user or patient.

Patient Information Screen



1. Tap the top left 3-bar icon and select "Patients" from the drop-down menu
2. Tap "Select Another Patient" and select patient

Patient Information



Add authorized contact (see next slide)

Patient information displayed

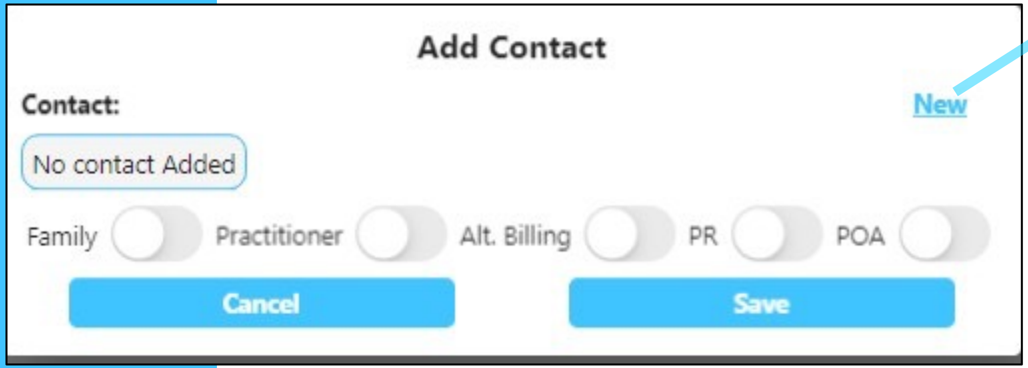
Type in information needed about patient

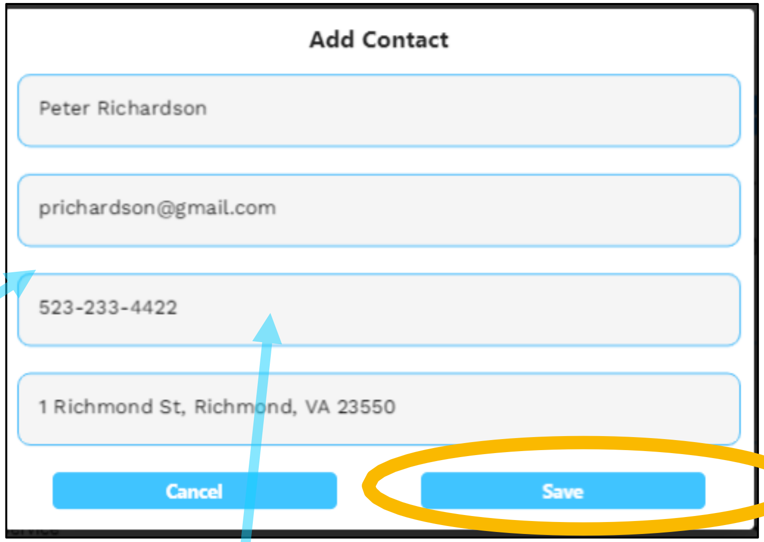
Optionally select default treatment type

Press *Save* to save (only required if Patient Information or default treatment type is modified)

View patient statement

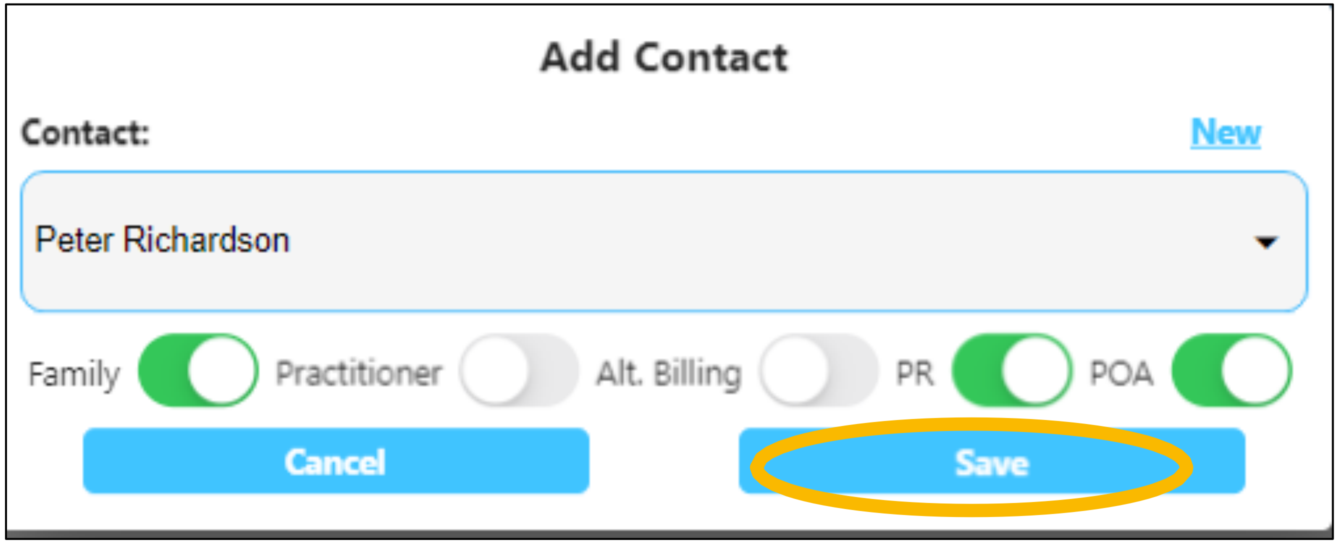
Add Patient Contact





1. Press blue + button next to *Authorized Contacts* and the *Add Contact* screen appears
2. Tap *New* contact
3. Type in name, email, cell, address
4. Press *Save*

Add Patient Contact



1. Back in the *Add Contact* dialog select Peter Richardson from the selection list under *Contact*
2. Select roles: Family, PR, POA for Peter
3. Press *Save* and contact appears on contact list

Financial Management

1. Getting Started
2. Patient Services and Expenses
3. Invoicing
4. Payments and Patient Statement
5. **Financial Management**

SCENARIO: IT'S THE END OF THE MONTH AND YOU WANT TO SEEYOUR INCOME AND EXPENSES AND NET PROFIT (INCOME) YEAR TO DATE

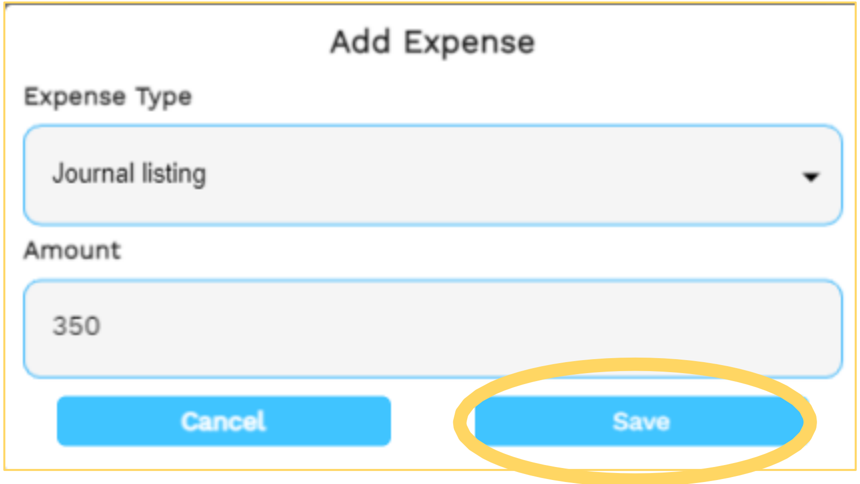
Financial Management

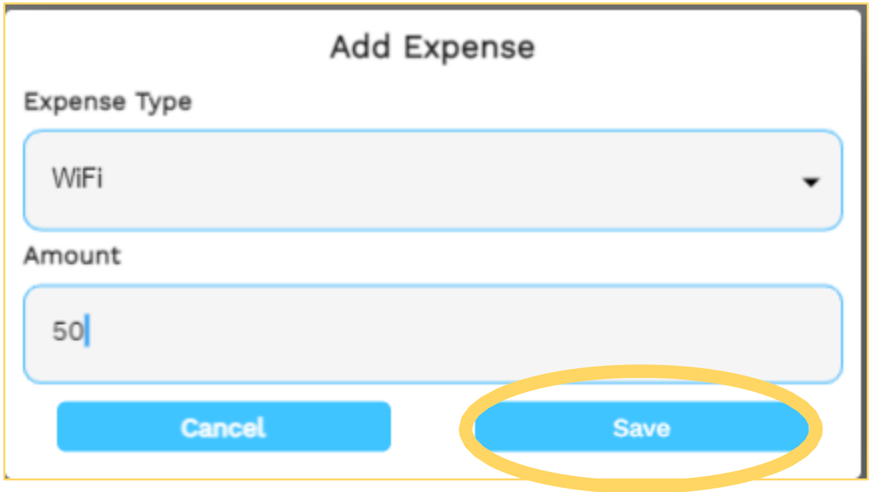
Financial Management involves recording all of your business expenses and then running a financial report at both monthly and year-to-date timeframes looking for:

- Adequate revenue generation
- Business expenses in-line with ‘budget’ or expectations
- Total net income (revenue minus expenses).

Net income is your salary and you need to monitor that it is in line with expectations. If not, you can look at ways to reduce expenses or increase revenue.

Business Expense Entry



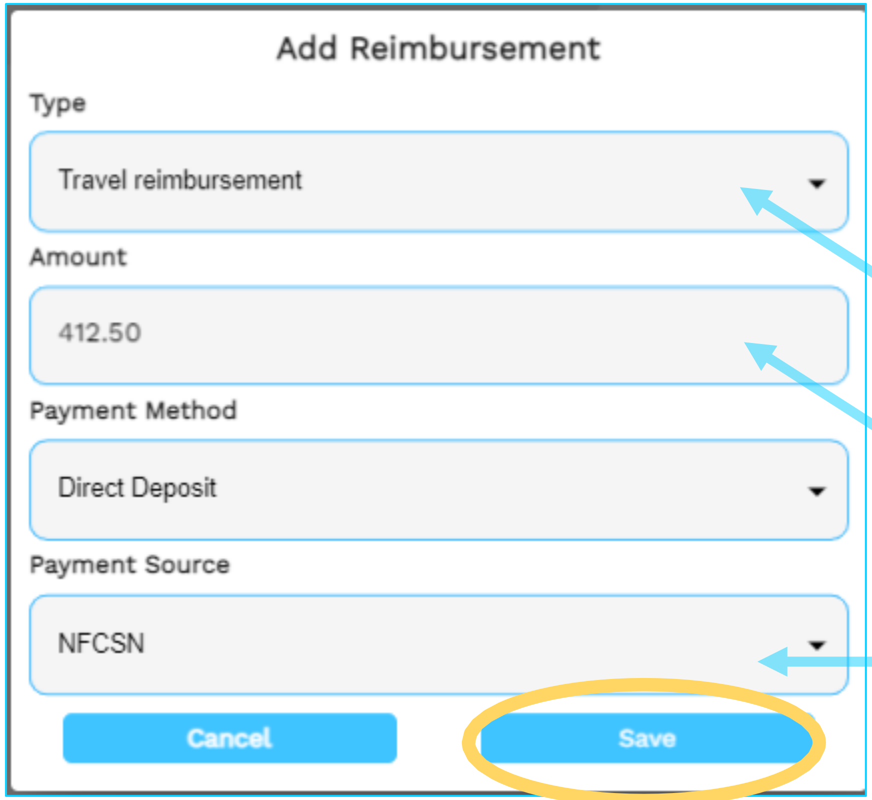


1. From the *Transactions/Expenses* tab, Click blue + icon
2. Select *Business expense* to include expense in financial report
3. Select the expense type *Journal Listing*, fill in the amount 350, and press Save
4. Create another Business Expense and select 'Wifi' and put $50 for the amount
5. Press *Save*

Reference: Business Expense Types

Business Expense Type	Business Expense Type
Supplies	Retirement Contribution
Mileage	General Liability Insurance
Meals	Umbrella Insurance
Travel	Auto Insurance
Conferences	Journal Listing
Uniforms/Clothing	Subscriptions
Cell Phone	Auto Maintenance
Office Utilities	Additional Training
Wifi	Credit Card Interest
Payment Transaction Fee	

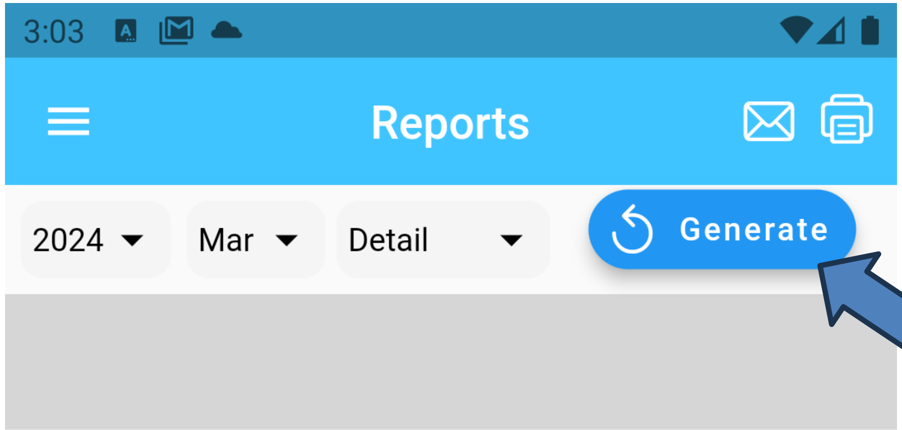
Reimbursements Entry



1. From the *Transactions/Revenue* screen, click blue + icon
2. Select *Reimbursement* from the + icon menu
3. Select type *Travel reimbursement* under Type
4. Type 412.50 as the amount
5. Select *Direct Deposit* payment method and *NFCSN* as the payment source
6. Press *Save*

Revenue Type
Travel Reimbursement
Matching retirement contribution
Training grants
Supplies reimbursement

Reports Screen



Kyle Richardson, Christian Science Practitioner **552-342-5999**
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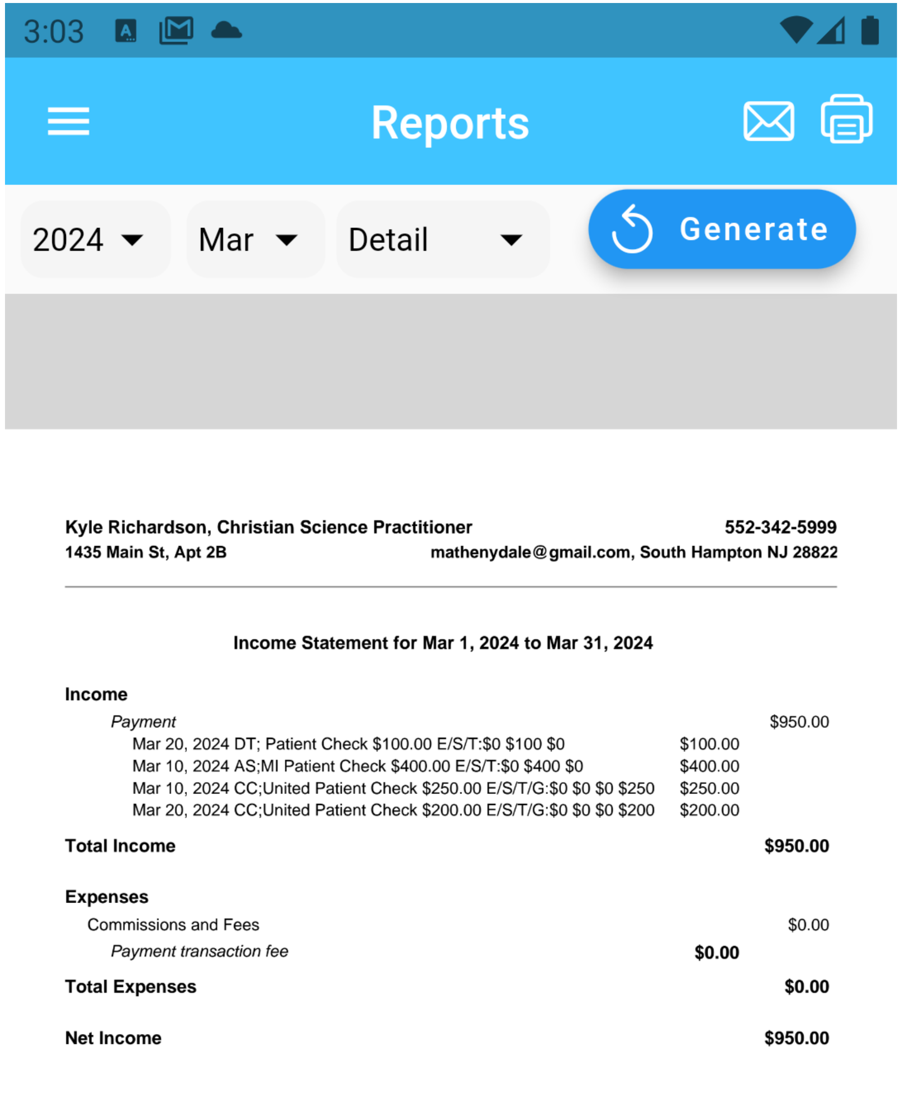
Income Statement for Mar 1, 2024 to Mar 31, 2024

Income		
Payment		$950.00
Mar 20, 2024 DT; Patient Check $100.00 E/S/T:$0 $100 $0	$100.00	
Mar 10, 2024 AS;MI Patient Check $400.00 E/S/T:$0 $400 $0	$400.00	
Mar 10, 2024 CC;United Patient Check $250.00 E/S/T/G:$0 $0 $0 $250	$250.00	
Mar 20, 2024 CC;United Patient Check $200.00 E/S/T/G:$0 $0 $0 $200	$200.00	
Total Income		**$950.00**
Expenses		
Commissions and Fees		$0.00
Payment transaction fee	**$0.00**	
Total Expenses		**$0.00**
Net Income		**$950.00**

- Select date range and report type: Summary, Detail, Category, or Past Due
- Press Generate button to get report

Detailed Financial Report



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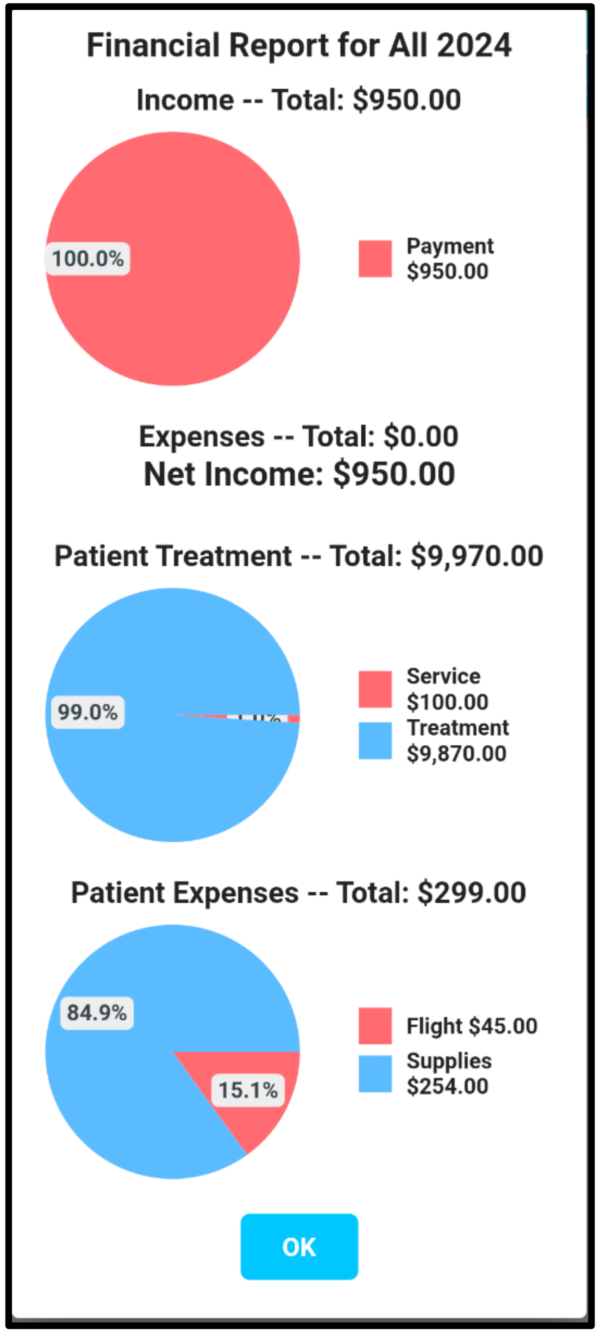
Income		
Payment		$950.00
Mar 20, 2024 DT; Patient Check $100.00 E/S/T:$0 $100 $0	$100.00	
Mar 10, 2024 AS;MI Patient Check $400.00 E/S/T:$0 $400 $0	$400.00	
Mar 10, 2024 CC;United Patient Check $250.00 E/S/T/G:$0 $0 $0 $250	$250.00	
Mar 20, 2024 CC;United Patient Check $200.00 E/S/T/G:$0 $0 $0 $200	$200.00	
Total Income		**$950.00**
Expenses		
Commissions and Fees		$0.00
Payment transaction fee	**$0.00**	
Total Expenses		**$0.00**
Net Income		**$950.00**

- Detailed report shows revenue breakdowns by payment type: E/S/T/G which are Patient **E**xpenses, **S**ervices, **T**ravel time, Gift
- All income is from payments and reimbursements.
- Business expenses are grouped by Tax Categories for Schedule C form.
- Net Income = income - expenses

Pie Chart Financial Report



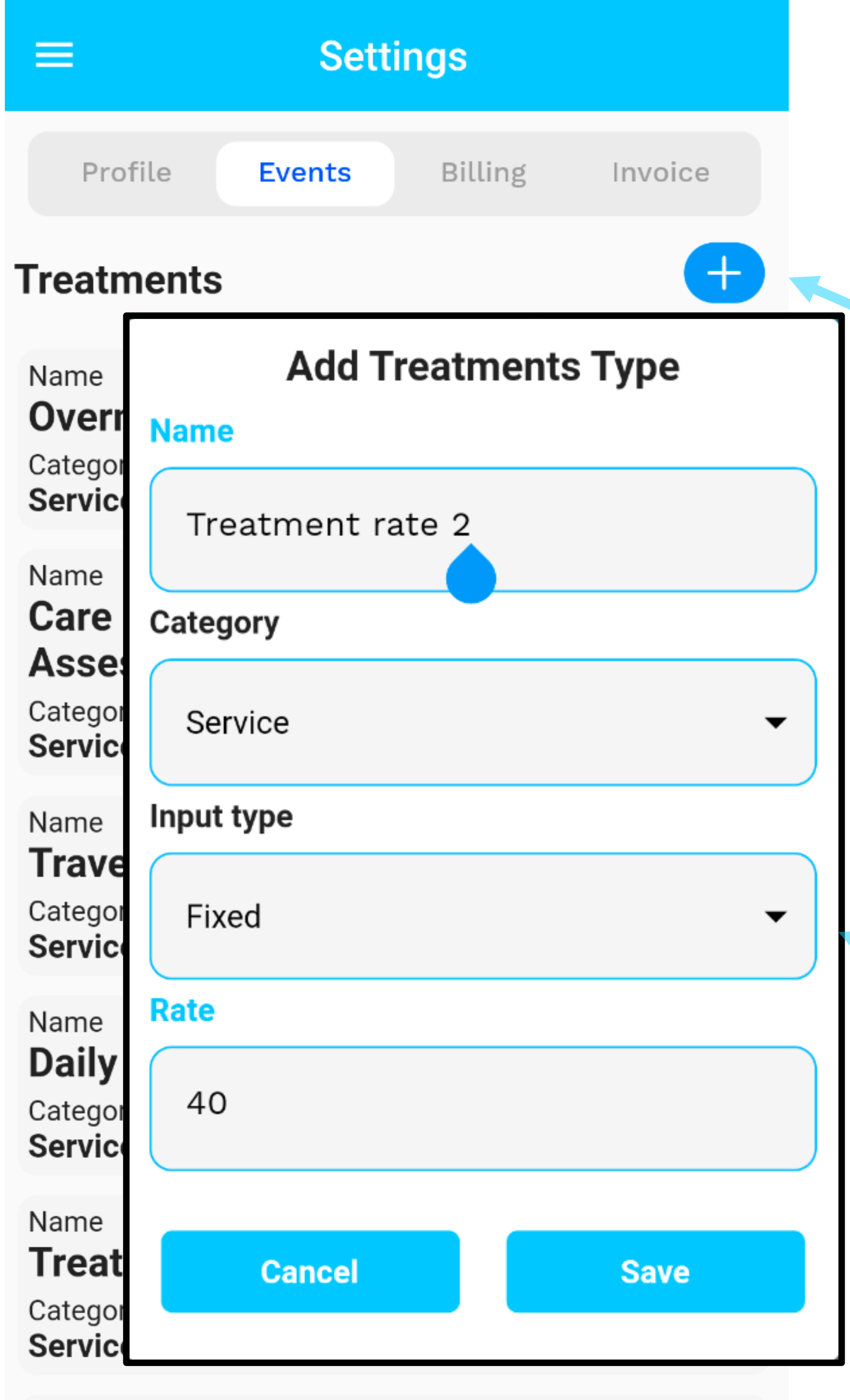
Category report shows income and expense sources as well as types of patient treatment and expenses.

Support

For technical support or questions email:

mathenydale@gmail.com

Creating an alternate treatment type or expense type



Go to Settings screen, Events Tab

1. Press the blue + button on the right of the event category you wish to add an event. Categories are: *Treatments, Revenue, Patient Expenses, and Business Expenses*
2. Enter information in the dialog. Input type is discussed on next slide.
3. Press *Save*

Creating an Event such as a Treatment type or expense

Input Types

Input types

Fixed: Rate=$30 Could be used for treatments or daily care which is a fixed charge.

Amount: User enters an amount. This is used for most expenses such as rental car or taxi. No rate or per field is required for an amount input type.

Per: Mileage $.50 per mile. Enter .50 in the rate field and the user will enter a number of miles. The system then multiplies the entry by rate to get the total charge.

Timeframe: A start and end time is required and the system calculates the # of hours then multiples the rate * hours to get the total charge amount.

For timeframe, go to Settings/Invoice Format tab to set the number of minutes to round the time to and the minimum daily time.