BASEDPSY 11 (PsyTablet)

Software for management of clinical records and financial management
for psychotherapists of all disciplines.

Database developped
by Alain Barbeau

www.basedpsy.com
alainbarbeau@basedpsy.com

User's Manual

BaseDPsy
Version 11

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Table of contents

General information on the use of BaseDPsy

1. Introduction and nomenclature

This manual focuses on describing how to use BaseDPsy and its peculiarities.

This manual contains a guide all the functions available in all BaseDPsy products; so you have to skip some chapters, if you do not use the calendar or if you do not use finances.

However, it does not describe how to use a computer or iPad or FileMaker Go. On the internet you can find specific guides.

The differences between the use BaseDPsy on computer and on iPad is connected mainly to the knowledge of the use of FileMaker Go and iOS.

Here are some complementary links to modes of employment for the iPad:
https://support.apple.com/en-ca/guide/ipad/ipadf3dbb83f/ipados
https://help.claris.com/en/go-help/

So our manual focuses on specific tools and the features of BaseDPsy.

BaseDPsy actually contains several programs or systems.
It merges:

- A data collection system and statistical reports,
- A financial management software,
- A writing system for notes and reports in psychotherapy
- A writing system for notes and Reporting group therapy,
- and another for institutional intervention
- in addition to leaving an important role for the conservations of all communications with your customers.

A chapter of this manual will be devoted to navigation BaseDPsy while another will allow you to refine your use by informing you of some specific functions to the software that are not named in an obvious way by some « buttons tools », but whose use will allow you to save time, lots of time.

BaseDPsy, like any software, also uses pictograms and graphic organizers whose knowledge will help you to increase your speed of execution. It is also helpful to read how to interpret them. And this, especially if you use BaseDPsy on an iPad because it does not display tooltips that explain, by flying over a tool, its usefulness.

We recall, however, that the use of BaseDPsy requires minimal skills in the use of IT. This minimum is the knowledge of the use of the computer depending on your platform. That is to say, a person who uses Windows needs to know the basic functions of Windows as a person using Mac OS should know the basic functions of the Macintosh system which are: flow in the system, create folders to backup copies, adjust system settings, switch between applications, use the mouse or pad, copy and paste, move documents from one folder to another, etc..

Some terms frequently used in different parts of the manual:

Record	Is any new entry in the database, for example, each client folder created, each new session, each new financial transaction, each new group therapy, etc..
Field	Space usually framed, generally with a white background, to enter information, data varied.
Button	Synonym: tool. Any graphic or text that when clicked triggers a procedure.

2. General structure of BaseDPsy

2.1 Recognize the files in the application folder.

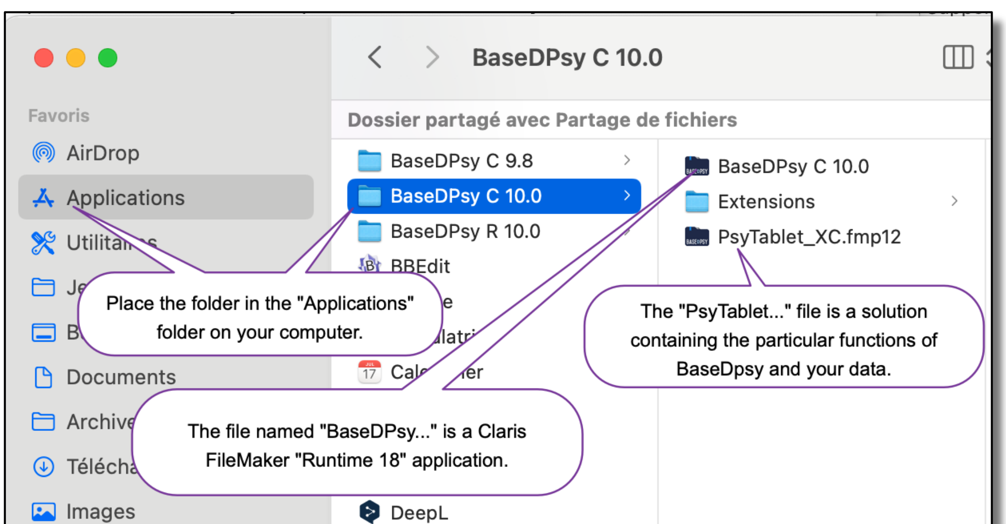
Installing BaseDPsy is like installing any software, it involves copying several files in your computer. The nomenclature and the number of files differ depending on the platform of your computer.

Regardless of platform, software BaseDPsy file will be placed on your desktop. You can move it later, depending on your skills and according to your preferences, either in "Program Files (WIN)" or "Applications (Mac)", or elsewhere, as an external hard drive.

As you probably want to make backup copies to protect your clinical records against a broken computer or loss of the medium (hard disk, USB key, etc..), It is advisable that you can recognize the usefulness of files inserted in the folder (directory) of the application.

Here are two images, first one for the Macintosh platform and the other for the Windows platform.

On the Macintosh platform (Mac OS), the application folder contains two files and a subfolder named "Extensions".



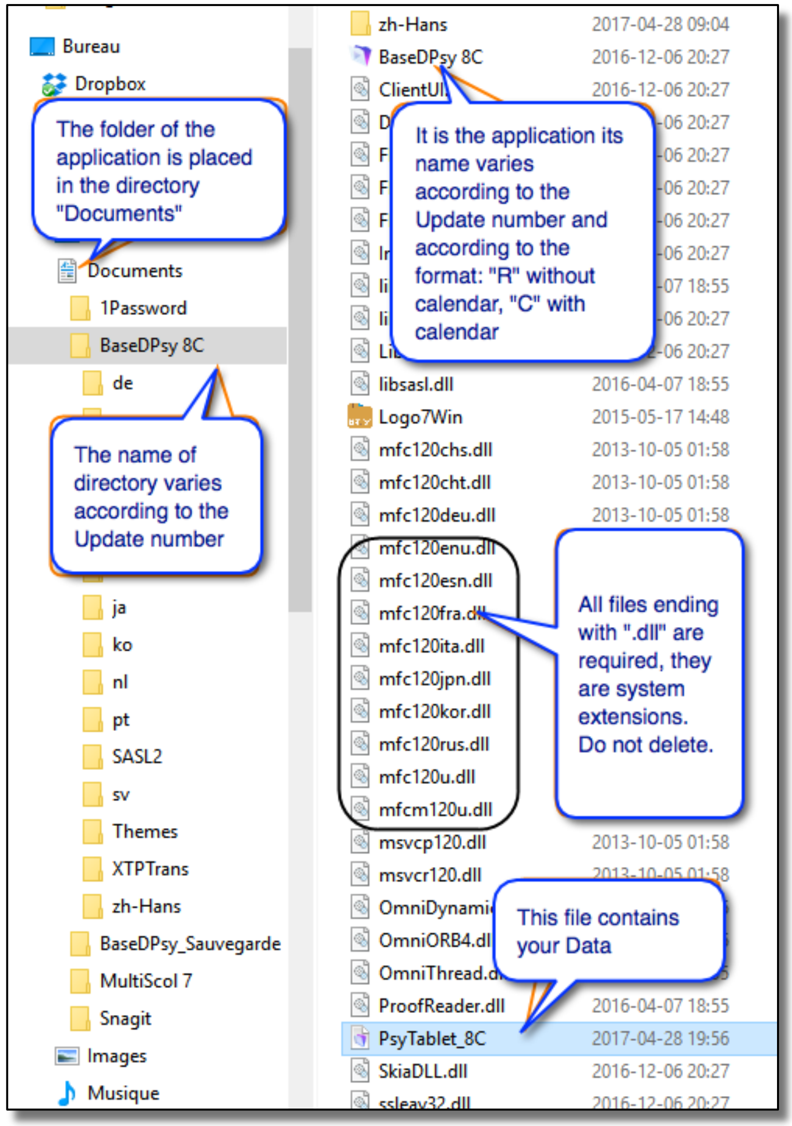
The file that contains the data is named "PsyTablet_8C.fmp12" for the version with calendar and "PsyTablet_8R.fmp12 for version without calendar. This file should be copied as a backup copy.

The file named "BaseDPsy" is actually an application whose original name is "Runtime" of FileMaker ™. This application is provided for free with the purchase of BaseDPsy, but it can be replaced by other applications, such as FileMaker Pro or FileMaker Go on iPad.

In the attached screenshot, replace "BaseDPsy 9C" by "BaseDPsy C 10.0" and "Psytablet_9C" by "PsyTablet_XC".

Always leave the "PsyTablet ..." file in the same folder as the "BaseDPsy" application, otherwise BaseDPsy will look for PsyTablet at the opening without finding it.

On Windows: Do not place the «Dossier BaseDPsy..» in "Programs" or "Program Files", because in this place, Windows locks files and you cannot save your notes there.



The installation on Windows creates more files and subfolders.

The ".fmp12" extension may or may not be displayed depending on the display settings you have chosen on your computer.

In the image displaying the contents of BaseDPsy 8 on Windows, due to lack of space, the image does not display all the files present in the folder.

It is important that you do not delete any of the files in the "BaseDPsy" folder. If a file with a ".dll" extension is missing, BaseDPsy may not open.

3. Navigate in BaseDPsy

There are several ways to navigate between the hundreds of interfaces that contains BaseDPsy.

On some two hundred interfaces, only thirty are directly accessible to the user. A number of interfaces are not accessible at all (like the translation dictionary), while another amount of interfaces are available only during the execution of a procedure. For example, statistical tables interfaces can only be viewed only by a procedure requiring a statistical report.

Even if the user has to be concerned about thirty interfaces, it is already a lot.

3.1 Menu or Table of contents

That's why we added a main menu that allows the user to find one's way at all times in BaseDPsy.

This interface named "Menu" is the equivalent of a table of contents.
When opening, wait until this interface is displayed before going into another section to allow the procedure to put everything in place.

It displays a list of interfaces separated by section names. Each list item is a button, a tool that displays the interface named on the button by clicking it.

For example, the button named “Ledger” foregrounds interface which records all financial transactions in BaseDPsy.

3.2 Menu header and toolbar header

We added at the top of each interface, a blue band containing navigation buttons. The name of the active interface is displayed above the list of buttons and the color of the button is inverted.

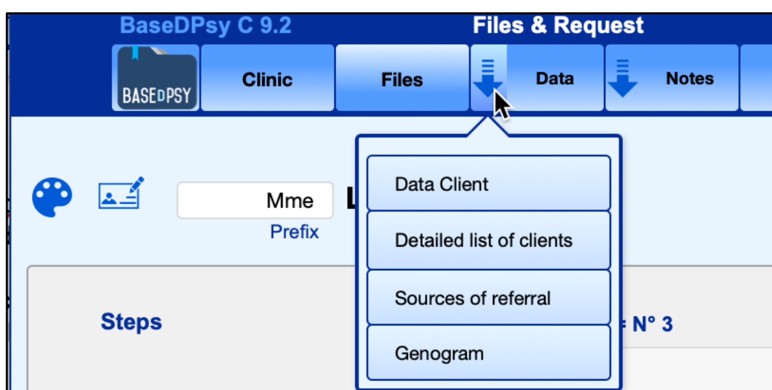
The buttons correspond to the sections of the main menu and contain the same interfaces as the main menu; Links to interfaces, are displayed as a drop-down menu by clicking the button. Each element of the pull-down menu displays the corresponding interface.

The buttons correspond to the main menu sections and contain the same interfaces as in the main menu. The button corresponding to the displayed interface has its inverted background colors, as here "Files".

The links to the interfaces are displayed as a drop-down menu by clicking the button or the arrow next to the button for the "Files", "Data" and "Notes" interfaces. Each item in the drop-down menu displays the corresponding interface.

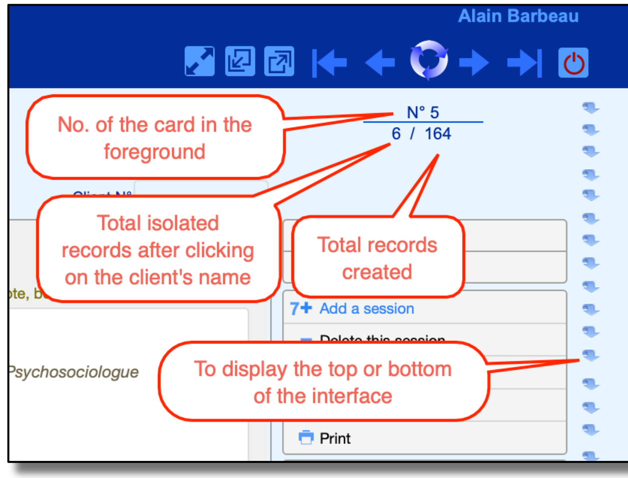
Clicking on any blue button, the interface is displayed.

When you use a header drop-down menu to change the section, if the same client as the one displayed in the section you left is present in the next section, it will be in the foreground when displaying the section. next section so that you always stay in touch with the same folder.



For example, if you the client displayed in the "Data" section is Lucien Roy, moving in the "Notes" section with the header menu, it will be the sessions of Lucien Roy that will be displayed when you arrive in the section "Notes".

To the right of the interface, there are other tools and numbers.

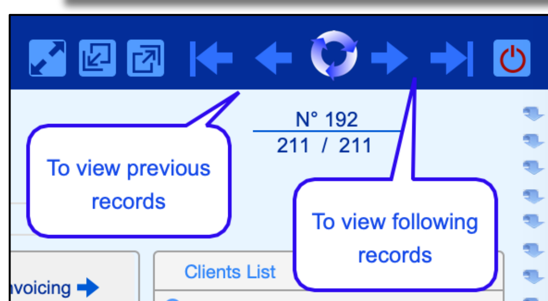


The numbers give you information useful for navigation: Above the bar: this is the number of the card in the foreground. Below the bar, the first digit indicates the number of records corresponding to the customer displayed, and the second number indicates the total of records created.

To isolate the cards corresponding to the customer displayed, just click on its name at the top of the interface.

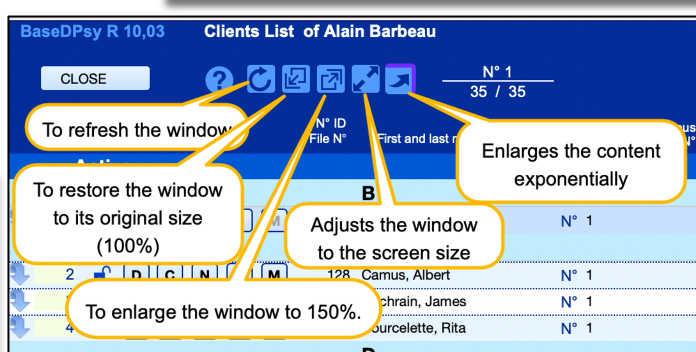
The arrows make it possible to circulate between the different cards of the interface. But you can only move with these arrows between records made available or isolated.

To make all cards available to traffic with the arrows, you need to click on the infinite circle button which means "Display all".



To display all cards (records), You can also use keyboard shortcuts:
On Mac OsX = CMD-J (command-J)
(The Command key is sometimes called "Apple")
On Windows = CTRL-J (Control-J)

The other three tools, to the left of the arrows are used to change the size of the window (interface).

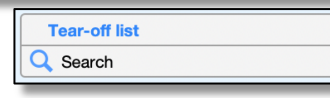


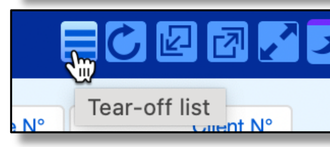
The series of vertical arrows on the right of the window allow to display the top or the bottom of the interface. The direction of the arrows is reversed to indicate the result of the next click.

The starter button is used to close the software. It is present in most interfaces. When you activate it, it also starts the backup procedure.

3.3 Navigating from the clients list (Tear-off list)

From the menu or the Folder section, you can display a " tear-off" client list. The list opens (separates) when BaseDPsy is opened, but if you have closed it, you can display it again by clicking on the tool bearing its name. In the other sections, you can display the list with a button in the form of parallel lines.



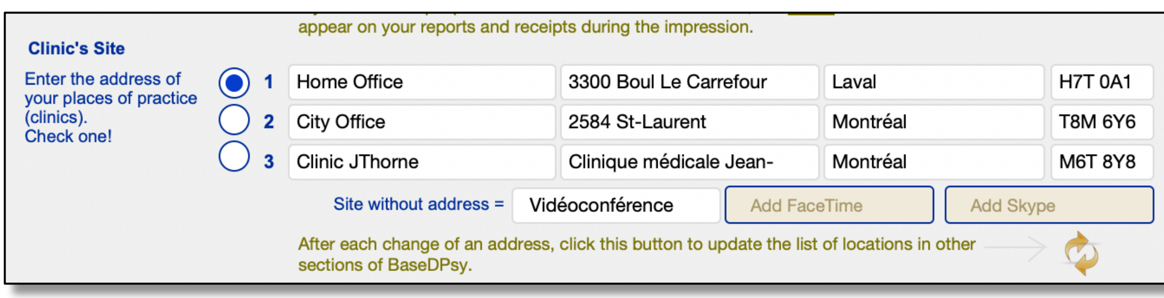


Once opened, an additional window is displayed next to the main window.

It contains the list of customers; this list is sorted in ascending order in the following order:
- Active folders followed by closed folders.
- The client's last name.

In the "Options" section under the "General" tab you can add an additional sort criterion. There are three choices: either the practice location, the client category, or the department. Note that the term "Department" or its list of values can be changed, for example, you can replace "Department" with "Programs". The change is made under the "List/Waiting List" tab in the Options section.

If you choose "Practice Location", it is important that you give a name to the address entered in the Options section, as it is by this name that the list will be sorted.

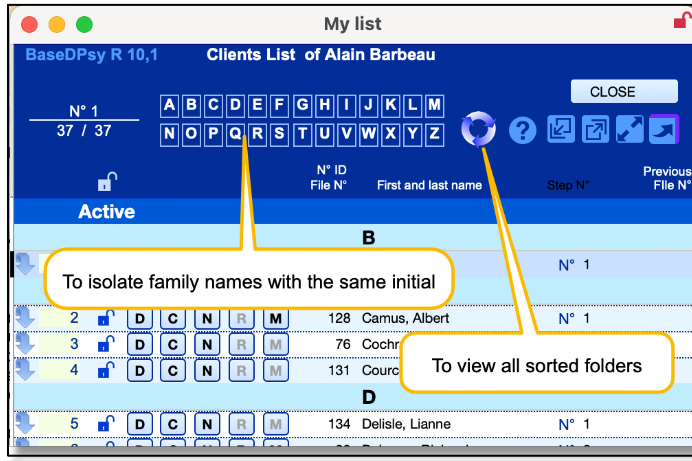


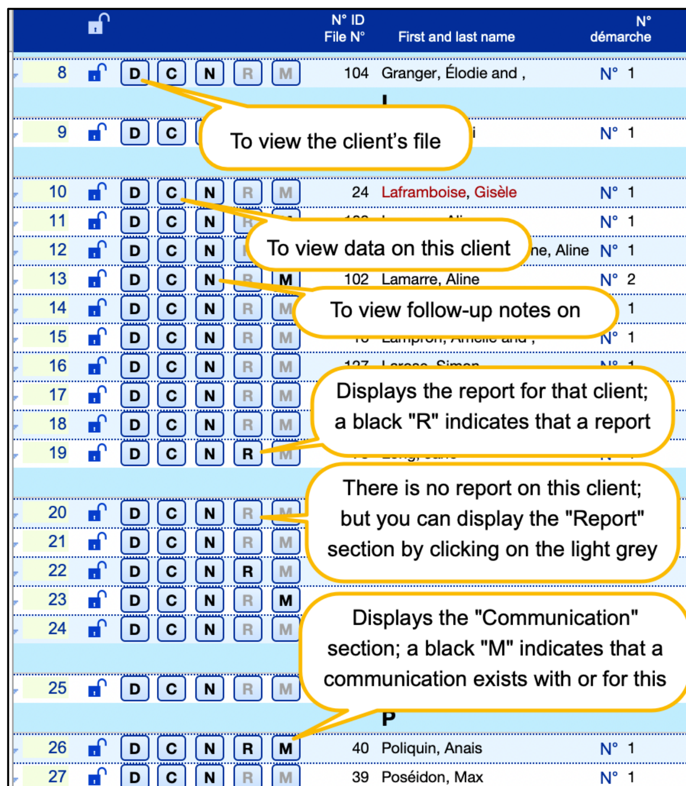
If you do not add a sort criterion, the list will not only be sorted by Active and Last Name, but also the initials for the last name will be displayed.

This list contains little information, it is used exclusively to navigate through each client's file without the need to do a search to display the client's information.

It contains 4 tool-buttons to display for each client:
- The file
- Information (data) about the customer
- Follow-up notes
- The report section (or client report).

The black color of the "R" button indicates if at least one report has been written for this client; in light gray, there is no report for this client, but allows you to display the section.

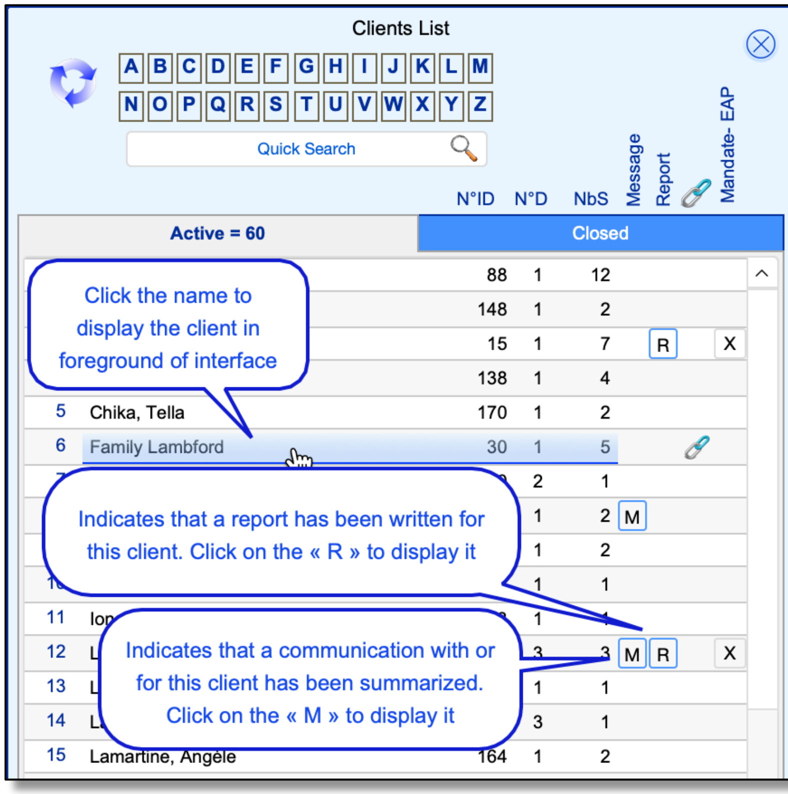




<u>The Clients List in the " Notes " section</u>

Some lists show more information, such as the one in the Notes section.

It contains several columns.

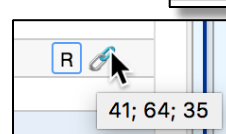


The first digit indicates the position in the list followed by the client's name.
Then the number after the name indicates the client's file number (ID No.).

The numbers under the column "N°D" correspond to the number of the client's steps.
"NbS" means "Number of sessions recorded for this client" thus also a number of cards.

The presence of an "M" or "R" box under the column headers "Message" and "Reports" indicates whether you have entered the contents of a communication or have written a report for the client of the same line.

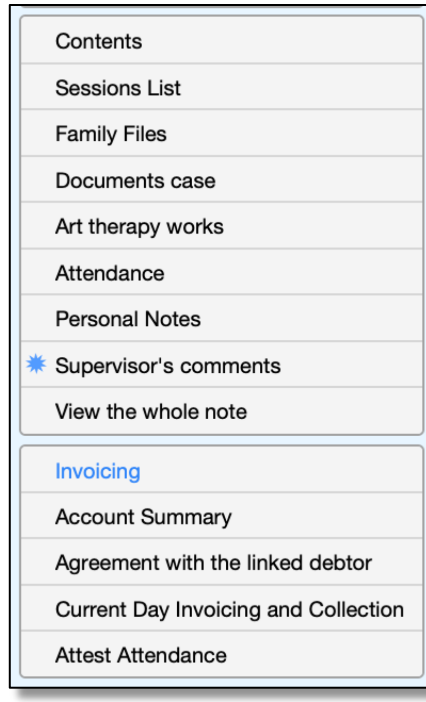
The presence of a link indicates that the file has been associated with other files (family or marital records). If you let your cursor rest on the link, the associated folder numbers will be displayed.



Finally, an "X" in the last column on the right indicates whether client sessions are paid for by an Employee Assistance Program, or if an EAP Mandate is active.

3.4 Navigate within the same interface

In previous versions, all the content of the interface was displayed under tabs. With version 9, some tabs disappeared in favor of panels that are displayed only by clicking on the tool in the toolbar on the right.



In the "Notes" section, for example, the "info on session", "history", "billing" tabs have disappeared in favor of buttons in the toolbar.

Detailed session information is now displayed in the content pane and in the planning pane.

We go from one pane to another by clicking on the button that activates a movement of the pane to the left or right depending on the pane concerned.

To display the "Billing" that is used more frequently, the tool is present in the toolbar and in the top right of the "Content" pane.

However, by displaying the "Billing" pane, we find the usual tabs.

Note that two tools may display a star blue dot: it is present when a content has been inserted in "Personal Notes" or in "Supervisor's comments".

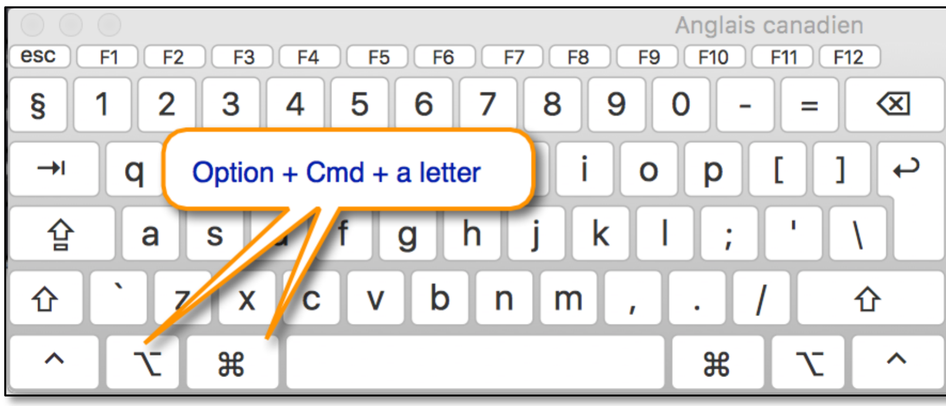
Under the tabs, there are also lists. As a general rule, when you click on a line in the list, it leads you to the referenced content. For example, in the "Sessions List" pane under the "Previous sessions's list of this patient" tab, if you click on a line, the content of the session will be displayed.

Under most tabs or panes, a question mark is present and contains explanations about the tools present. By clicking on the question mark, a window displays explanations.

3.5 Keyboard Shortcuts

We've added keyboard shortcuts that let you use the keyboard to access different parts of BaseDPsy, which is an alternative to using the mouse and clicks on the buttons or on the header menu.
Each shortcut uses the same two function keys followed by a different letter for each section of BaseDPsy.

On Apple (MacIntosh) keyboard, the two function keys are :"Command and Option"; The key "Option" is sometimes called "Alt" on the Apple keyboard.



On Windows the two keys are « Control and Alt»
The position of the function keys may vary from one keyboard to another depending on the manufacturer of the keyboard.

Here is the liste of keyboard shortcuts :

Section displayed	**Letter to use**	**Meaning mnemonic**
Menu	**M**	M for Menu
Dashboard	**T**	T for Tableau de bord
UserManual	**6**	6 for « **?** »
Options	**U**	U for User
Report	**R**	R for Report
Notes	**N**	N for Notes
Data-client	**C**	C for Client
Files - Request	**I ou « i »**	« **i** » for Inscription
Wainting List	**A**	
Debtors	**P**	P for Payer
Ludger	**L**	L for Ludger
Expenses	**X**	X for « **Ex**penses »
Suppliers	**V**	V for Vendor
Calendar	**K**	K for Kalendar (Calendar)

Other letters have been more relevant, but some letters are already reserved for use in keyboard shortcuts operating system or FileMaker Pro.

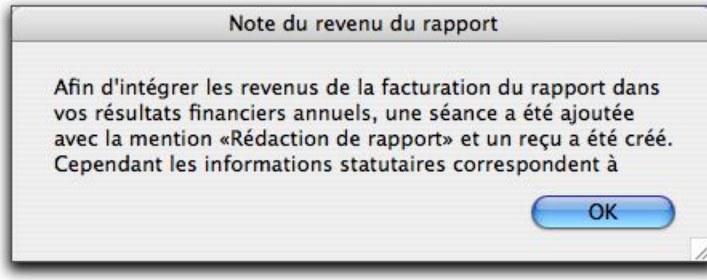
Another limitation: When you use the keyboard shortcut, the continuity of the same client from one section to the other can not be assured. So unlike the navigation header menu that displays the same client through the file notes, for example, navigation using the keyboard shortcut will simply repost the client who was at the forefront during your last visit at this section.

However to view the sections unrelated to the link to a client, navigation shortcut is faster.

3.6 To widen dialog box

Dialog boxes or windows containing messages can be enlarged or reduced with your cursor. This allows to read the text when it is truncated by a too small window.

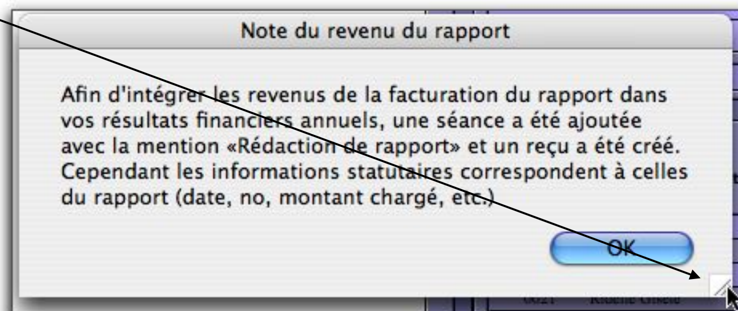
Place your cursor over the bottom right corner of the window, click and drag your mouse simultaneously to achieve a change in the size of the window.



Here is an example:
The text of this dialog box is truncated. Missing end of text is: «…correspondent à celles…»
Use the lower right corner of the window to widen or reduce.

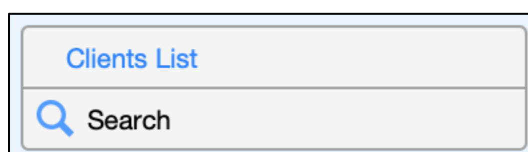
We suggest you widen the first dialog box that appears at the opening of BaseDPsy,

(The contents in the two images is fictitious and do not occur in BaseDPsy 6)



3.7 Search (Find a card, a client, a note, etc.)

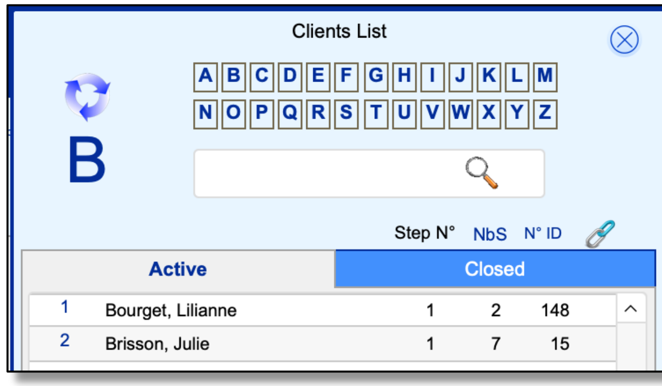
In each interface, you will find a tool displaying a list corresponding to the content of the interface.



In the sections on intervention with individuals, the list is called "List of clients". In the Group section, it is called "Group List" and in the Institution section, it is called "List of Organizations", and so on.

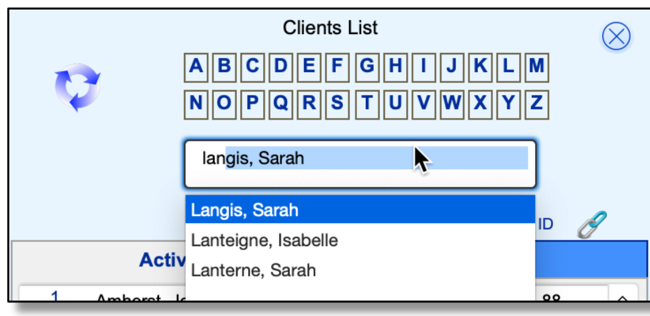
These lists allow you to display the client or the card of your choice using various integrated tools.

The list contains two tabs: one for active files, and the other for closed files. By clicking on a line of the list, the client of the line will be displayed in the foreground in the interface.



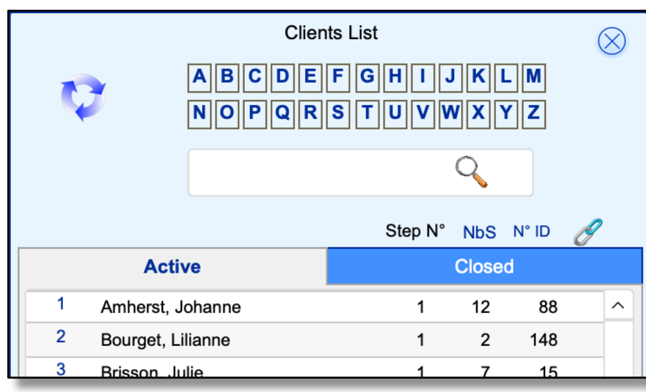
The letters of the alphabet at the top of the list allow you to filter the list so that you only display names whose initial corresponds to the letter you clicked previously.

For example, we clicked the letter "B" and only the names beginning with "B" are displayed.



If you click the button whose icon looks like a circle, all the names will be displayed again.

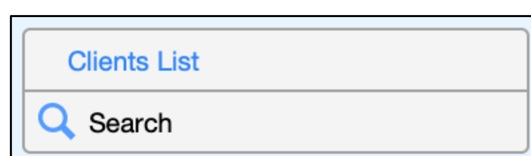
Under the alphabet, there is also a section called "Quick Search". By clicking in the topic, the list of clients is displayed, but if you enter the first letters of the search name, only the names corresponding to these first letters will be displayed.



For example, typing "lan" names beginning with these letters are displayed exclusively in the list. By selecting the one of your choice, these will then be placed in the foreground of the interface and the list of customers will close.

By clicking next to the list, or on the blue "X" at the top of the list, the list window will close.

Under the "Clients List" tool there is also another search tool with different choices.



The section "Quick Search" works in the same way as the one in the list of customers: by automatically selecting the names corresponding to the first letters typed in the heading.

Content search

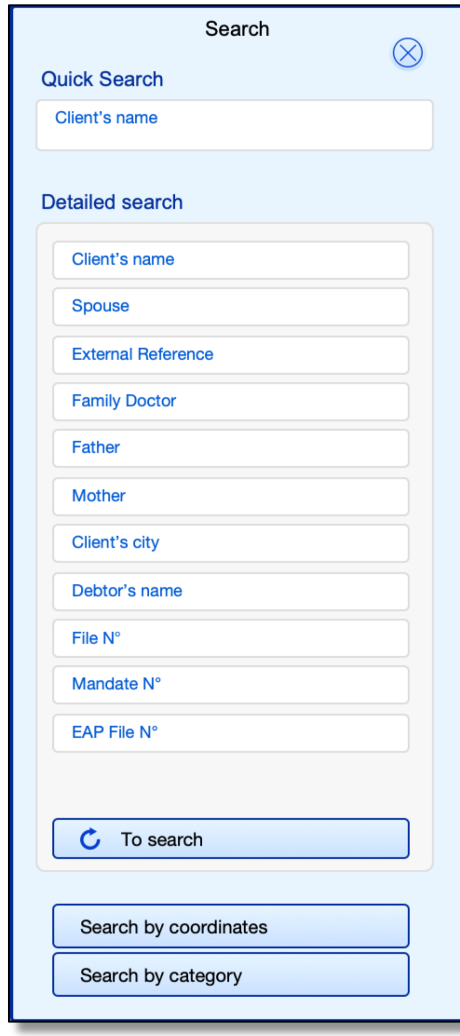
Under "Detailed Search" of the « Data» section, there are several fields for searching other than the customer name. Another advantage, you can enter in "Client’s Name" field just the first name and the search engine will find all clients with this name.

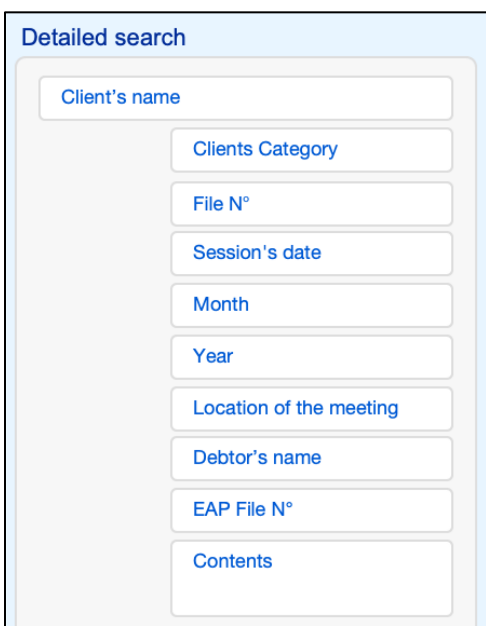
However, to start the search you must first enter content in one of the fields and then click on the "Search" button.

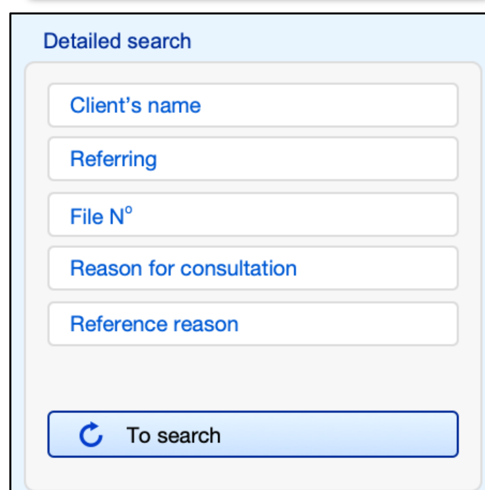
The other two tools launch specialized procedures focused on specialized data: either customer contact information or client categories.

These two tools allow you to display several results, ie several clients corresponding to the search criteria, by displaying the results in an additional window in the form of a list of clients.
The search by coordinates allows you to search for a name, an address, a telephone number.

In the "Files" section and the "Notes" section the search fields are different. In the section "Notes" there is also a section "Contents" that allows you to search for a text of your choice within the summary of the meeting.

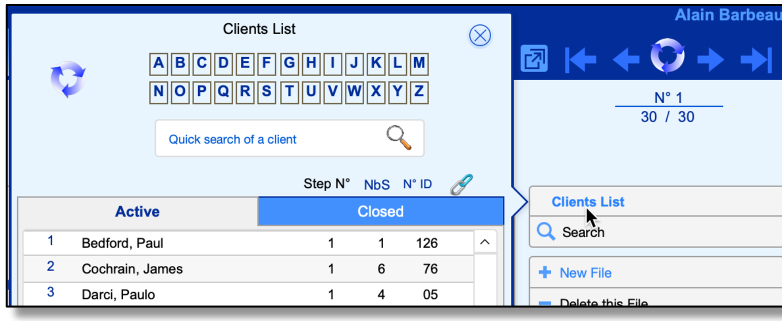






Quickly find a client's file in BaseDPsy

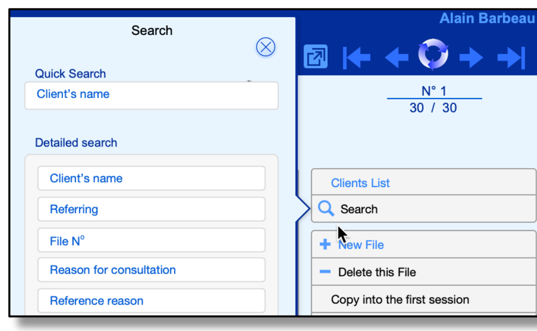
When the number of cases becomes very high, it may be that the search for a customer in the list of customers requires patience, because in addition to having to scroll the list, this list is filtered and sorted alphabetically in ascending order, and sorting may require a certain waiting time ...



This is why we have added search tools

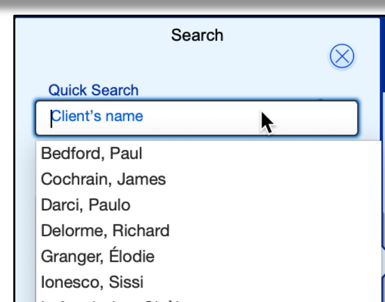
Rapid search

The first titled "Quick Search" contains the complete list of names. But the idea is not to scroll down the list.

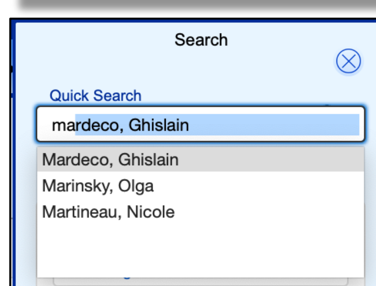


Rather, it's just a matter of starting to write the first few letters of the name ... and names that have those first letters will appear automatically. In other words, the name completes itself.

In this example, Ghislain Mardeco's name does not appear at the top of the list, but as soon as I write "ma" the name appears on its own.

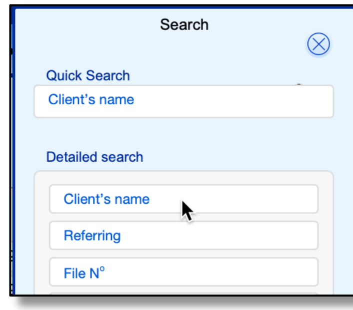


Then click out of the search field and the search will be performed automatically to display the file containing the name displayed in "Quick search".



Find a file by first name

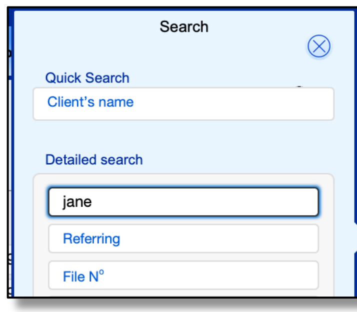
A second tool also contains a complete list of files, and again, the idea is not to scroll down to find your file. The list is located under “Detailed Search”.

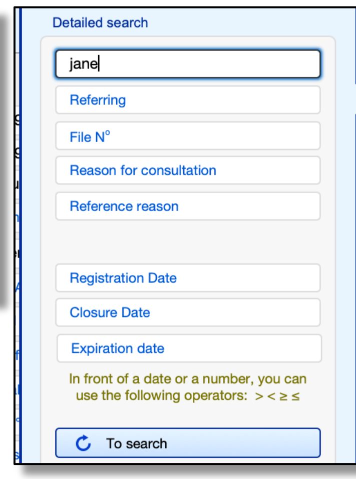


This second list is especially useful for helping you find a file when you do not remember the last name, but only the first name.

Click in the list and type the first name

In the example attached, I typed "jane".

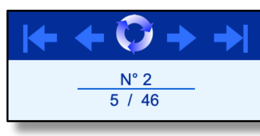




Then you go to the bottom of the window and click on "Search"

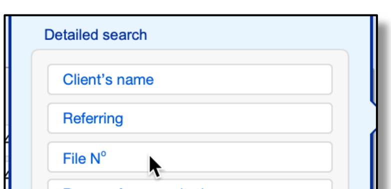
By clicking on search, the procedure will find all the files, which you have the right to see, whose first name is "Jane".

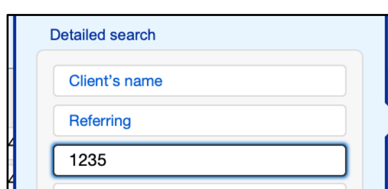
If the search found find more than one record with the same first name, then you use the navigation arrows at the top to view the folders one by one.



Find a file by its number

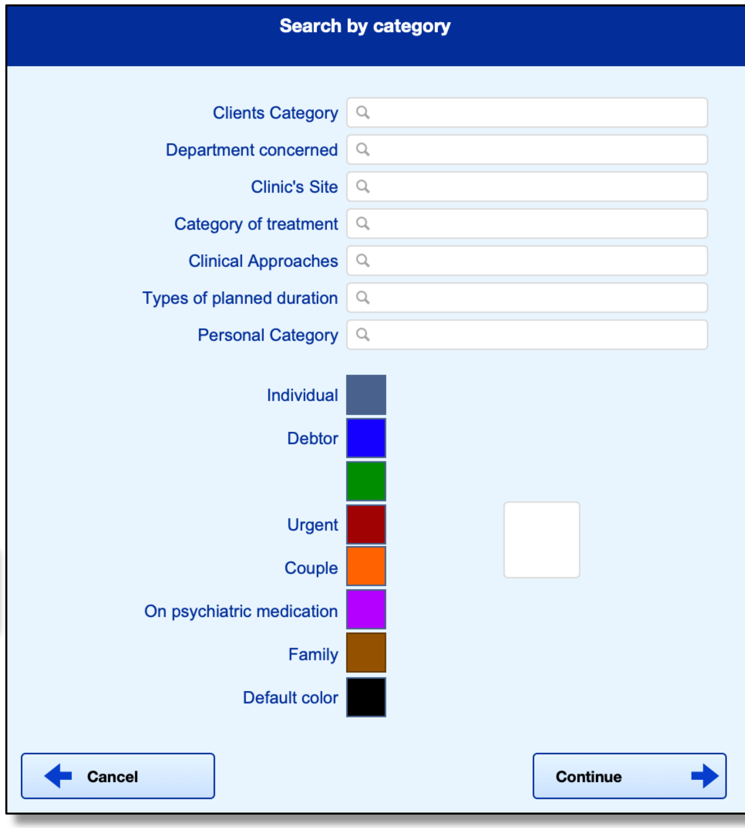
If you remember the file number, you can also directly display the file you are looking for by entering its number in the "File number" section and then clicking on "Search".





Search by category.

Category search displays a search window that includes all the categories found in the "Files" interface as well as all the color categories to which you have assigned a meaning.



In the example opposite, not all colors have been attached to meanings.

To assign meaning to colors, you use the color palette button, which is present in the « Files » section and in the "Data" section.

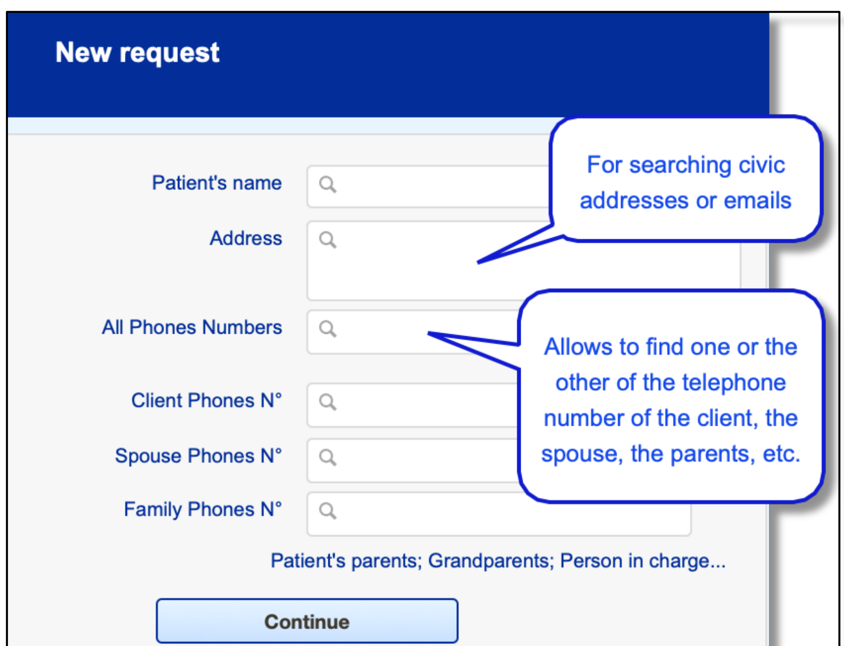
To search a category of customers corresponding to a color, just click on the color

Once you have entered your search criteria, click on "Continue".

Search by coordinates.

The tool is present in the "Data" section. The "Search by coordinates" tool allows you to quickly find a folder by one of the following elements:

- A personal name (Client, parent, grandparents, guardian)
- A phone number (all numbers entered in the section)
- A civic address (door number, street, city, etc.)
- An email address.



When the procedure is started, it displays a window containing several fields.

The current fields allow to find the name of a person through a single field that contains all the names entered in the "Data" section. This is the same behavior with the field "Address" and the field "All Phone Numbers". This section will be useful if you do not know to which category of person belongs the phone number.

On the other hand, we have added three sections that allow to specify the search for the phone numbers.
However, if the customer has three different phone numbers, there is only one search box, but no matter if his phone number is that of the cell or that of the office, the search will display his name if the No. corresponds to one of his three numbers.

It's the same logic for the phones of all people connected to the client: Parents, grandparents and guardian.

The search will display the results in the "Detailed List of Psychotherapy Clients" section.

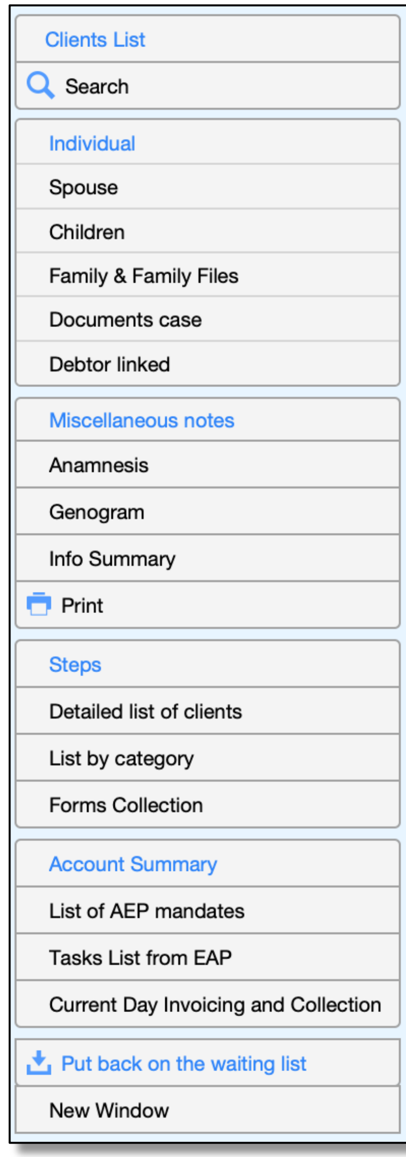
Since this list does not display all the information entered in the data section, for example, it does not display the grandparents' phone numbers, do not be surprised if a name appears without displaying the requested phone number.

For example, if you have asked to display all the phone numbers beginning with "514", the list will contain all customers of which one of the persons has such a N °, whether it is the spouse, the father or guardian, etc. The same result for addresses, if you are looking for the door number (civic number) "800", it is possible that several customers are listed without it being the civic number of the customer himself.

If you want to cancel the search after launching it, click "Continue".

4. Tools into BaseDPsy.

4.1 The Toolbars



The drop-down menu of the header is present in each interface and remains the same. The tools in this menu are mainly used to change the interface, so to navigate inside the software.

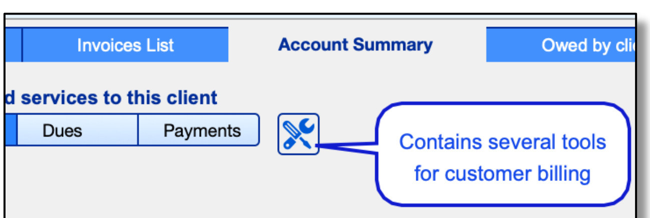
On the other hand, when you use a header drop-down menu to change the section, if the same client as the one displayed in the section you left is present in the next section, it will be in the foreground when displaying the section. next section so that you always stay in touch with the same folder.
For example, if you the client displayed in the "Data" section is John McGrave, moving in the "Notes" section with the header menu, it will be the sessions of John McGrave that will be displayed when you arrive in the section "Notes".

The name of the interface is always located in the same place, at the top and in the center of the drop-down menu.

In each data entry interface, and not in list-based interfaces, the toolbar is on the right.
The tools it contains are specialized according to the content of the interface.

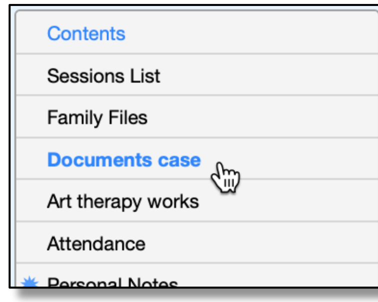
Other tools directly related to interface contents are occasionally located under the tabs.

For example, in the "Notes" section under the "Account Summary" tab, there is a specific toolbar.



The toolbar groups tools of different natures. Some tools display content as a pop-up window. Others display a list of related tools, as the "Print" button often hides tools to launch specialized printing. Others are used to display interfaces associated with the content, as here "Detailed list of clients". Finally some are used to launch procedures like here "Current Day Invoicing and Collection".

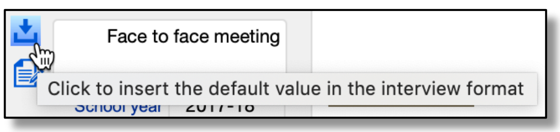
When your cursor hovers over a tool, the appearance of the tool and your cursor changes to help you avoid mistakes



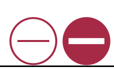
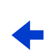
4.2 Tools in the form of icons

We have standardized the meaning of the icons to help you learn their specific purpose.

In addition, if you let your cursor rest above the tool-icon, most of the time, its utility will be displayed, as here for the arrow icon pointing a tray.



The list opposite is not exhaustive, because some tools in the form of icons are explained directly where they are used; for example tools concerning documentcases or tools concerning statistical or financial reports.

Icon	usefullness
	Color the name and give meaning to the color
	To add a detailed description of the billed service
	To display the client’s debtor
	To edit the client’s name
	Contains an additional list of specialized tools
	To send an email, an invoice by email, etc.
	Displays a window containing a geolocation of the address
	Contains a descriptive list of the usefulness of the tools present in the interface or in a list
	Contains the list of values of the juxtaposed field and allows to change the list of values.
	Displays the website according to the address inserted in the juxtaposed section
	Deletes the contents of a choice, filter, etc.
	Close a pop-up window
	Deletes a line in a list
	Indicates the presence of hidden content in the popup window
	All arrow shapes indicate the presence of a reference procedure

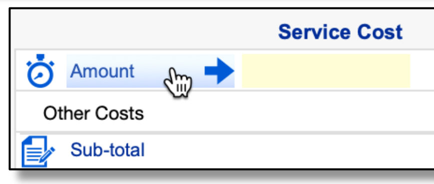
4.3 Discrete or embedded tools in the title heading text

Several tools in BaseDPsy are not identified by a button or an icon. They are embedded in the text. To discover them, it is enough to fly over the text so that their presence is revealed. The color of the text's background changes by hovering over the text and the cursor changes to a hand.

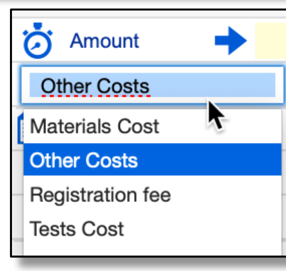
Here are some examples :

In several interfaces, click on the client's name, isolate the cards that concern him and put them in the foreground.

Under the "Invoicing" tab in the "Notes" section, the title background of the "Service Cost" heading, that is the bottom of the word "Amount", turns blue by hovering over it and an arrow appears.



The title of the heading "Other Costs" is changed, when flown over, to indicate that it can be modified and redefined with a drop down menu.



Many of these discrete tools also have tooltips or khaki text that explain their usefulness. These explanatory khaki texts have been added for those who use BaseDPsy on an iPad because FileMaker Go does not display tooltips.

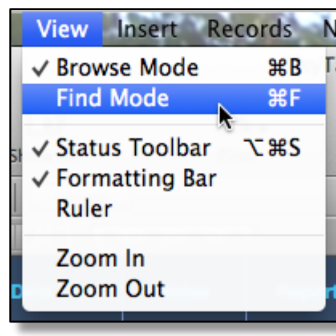
For example, in the section Client-Data, under the tab "Parents of the client", a text explains that by clicking on the icon you will insert in the address of the father, that of the client.

4.4 Tools not to use.

There are some tools available on a desktop computer and an iPad that it are better to not use. On the iPad, the tools are provided by FileMaker GO and not by BaseDPsy, while on the desktop PC, we have chosen to leave a tool available for exceptional use.

4.4.1 Find Mode

On the desktop PC, the submenu of "View" menu will put the software on "Search" mode. If you use this tool, all field titles disappear, which is an effect of how the software is translated by us. We suggest you do not use it.



If you decide to use it, so you need to remember the title of the field before use, then once your search word inserted into the field, click the "Return" button.

It is preferable to use the "Quick Search" instead of "Search Mode". But, the Quick Search is programmed to look for in a limited number of fields precisely in order to maintain its speed. You can therefore use the "Search" mode only when you know the information available, but it cannot be found by the Quick Search.

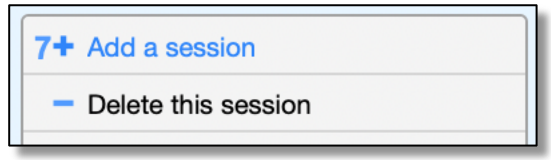
4.4.2 The « Plus » sign in table view

In the table view, at the far right of the table, there is a "+". **Do not use it**: The utility of this button is to add items. If you create an item, you won't know what to do with the added item which will not be included in the procedures BaseDPsy.

The column headings in the tables cannot be multilingual, so they stay French.

4.4.3 Adding or deleting a record

In BaseDPsy, when you delete or create a new folder using a button for this purpose, a procedure in the background performs several steps to create links or to delete other records related to the one you delete.



With the desktop PC, some tools offered by FileMaker were removed in programming BaseDPsy. However, if you are a connoisseur of FileMaker, perhaps you'll be tempted to use the keyboard shortcuts used to add or delete a record. **We strongly discourage you**.

The reason is as follows: In BaseDPsy, all records are connected. For example, whenever you create a new folder, other records are created in other sections BaseDPsy and a link is created between these different records. If you use a tool that lets you create a record without using buttons specially created for this purpose in BaseDPsy, you create a record in a section without the necessary links in other sections. You'll automatically create errors in your database.

For the same reason, we recommend not to use any of the tools displayed here and available on the iPad with FileMaker Go:

Files (Folders) management

5. Creation of a client file

5.1 The concept of a file in database.

In a traditional folder concept, we usually speak of a cardboard in which we keep loose sheets with all the various notes and information relating to a person or an organization or a single subject.

Here is the definition of a folder in « Oxford dictionary »:

> *« a folding cover or holder, typically made of stiff paper or card, for storing loose papers.»*
> *and*
> « Computing : *a directory containing related files or documents. »*

In this user Manual, we will use « File » as synonyme of « Folder ».

In a database, the concept of file rather refers to an identifier that will link together all the information entered in multiple interfaces. And this identifier is usually a File N°, a ID N° or a code.

In BaseDPsy, we use a sequence of digits sometimes preceded by letters, such as identifier (ID N°) or as File N°

In BaseDPsy, an identifier is generated automatically when you create a new entity (client, debtor, group, message, report, notes, supplier, expenses, etc..) This identifier may not be changed by the user . In addition, the identifier is used as File N° for the following entities:

- Client in psychotherapy (individual, couple, family)
- Institutional Client (Organization, Institution, etc.)
- Group (Group Therapy)

So there are several categories of files in BaseDPsy. There is also a different interface for creating files of each entity that we have listed above.

5.2 File creation for clients in psychotherapy

For any customer in psychotherapy, there are several relevant sections and several elements that will be interconnected:

1. Folder settings (No., dates approach, details of the application and understanding);
2. Information about the client (Data-Client);
3. Notes on the evolution of therapy (Notes);
4. The directory of clients;
5. The bank of forms;
6. Billing clinical interventions;
7. Exchanges and communication with the client (Messages);
8. Written reports (Report).
9. In this chapter, we will deal with only the first three sections, the others will be addressed in specific chapters later.

5.2.1 First steps in file creation.

For all clients who ask for a marital, family or individual Therapy, you go to the « Files-Request » section first, to open a new file.

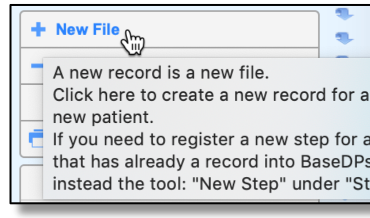
The section includes three tabs with different content to meet the professional standards of record keeping:

- The dates definition of the step;
- The notes on the request of service of the client;
- The terms of the departure agreement with the client.

Two buttons activate the procedures for creating or deleting client files.

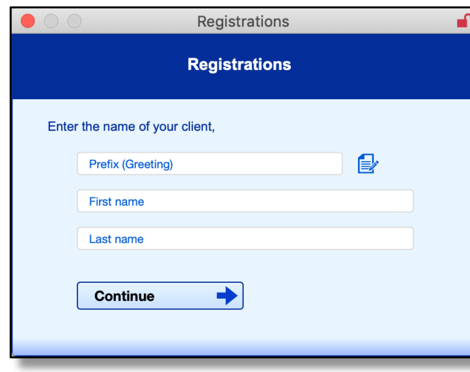
5.2.2 The file creation in BaseDPsy.

Before creating your first folder, we recommend that you set the default values available in the "Options" section under the "List" tab.



When you create a file in BaseDPsy, the procedure performs several operations in the background.

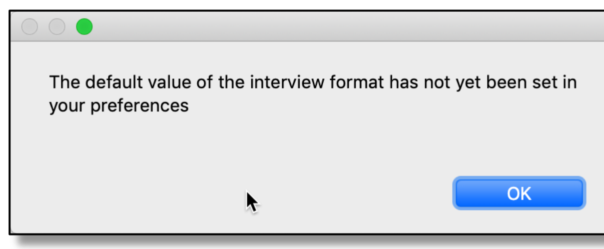
The procedure creates a name and associates an ID N°, it simultaneously creates a record in the Directory, the registry, in the Notes section with the same ID that will serve as a link between the different sections.



The procedure also defines some data automatically:

- The selection of interface as "individual";
- The date of the first session with the same date as the date of creation of the new file;
- Hours appointments and other details on the session remain empty.

The method displays a single dialog box to identify the name and surname of the client and then lets you choose what additional data on the agreement, the client and the session you want to enter.



If you have not entered in the "Options" section the default value of the "Interview Format" for the follow-up notes , a message will notify you.

But later, you will have to define the following data in the "Notes" section

- Interview Format
- Duration of the session
- Start time
- End time
- Site of practice
- Session content
- Billing

When you write the first follow-up note in the new file, then it is important to enter the start time and the end time of the session, so that the hours are repeated in the subsequent addition of new sessions for same file.

If you use the calendar version, when you write the first note of tracking the new file, then it is important to enter the start time and the end time of the meeting In order to find the appointment in the agenda and that these hours be repeated in the subsequent addition of new sessions for the same file.

Appointments equivalent to the sessions created will be visible in the agenda only once you have added the start and end time of each session.

However, an alert appears when attempting to display a date in the calendar without first entering a start time at the session;

Some errors in use also involve that the RDV equivalent to the date of the session has not been created, in this case there will be an automatic creation of a new RDV when attempting to display in the agenda a session that does not have its equivalent in the calendar.

The changes are automatically transferred to Notes or to Event, when you leave one or the other of these interfaces.

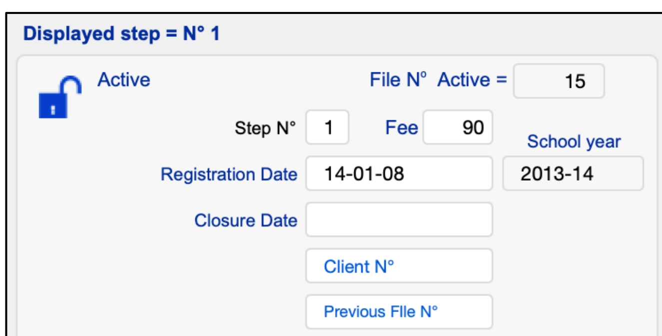
5.2.3 The concept of step and creating folders (files)

When a client starts therapy, he "enrolled" in a therapeutic "step" with you, and you create him a folder. First, create the folder and step are synonymous.

But it happens that some people stop their therapeutic step and come back later.

It is during this return that the therapist will have to choose between a) is it a new therapeutic step or b) is it the continuation of the first move.
But in all cases, the therapist does not want to open a new folder for the same client. But if it's a new step, the therapist will want to keep track on the record, where the notion of "re-registration" (New Step).

With BaseDPsy, so it is possible to "Register" several times the same client while retaining a single client folder.



In principle a completed step entails closing the file. To close a file, simply enter a closing date in the field for this purpose.
The closed file is identified by the presence of a «Closed" padlock.

In the "Files & Request" section, tools for managing steps are under the "Steps" pane.

To close a step or a file, simply enter a closure date. If you click on the button "Close this step", the procedure simply reminds you to include a date in the "Closure Date".

To reopen the file, you must choose whether it is a new step or whether it's the pursuit of the abandoned step. If this is the continuation of the therapeutic step, simply delete the closing date and the file becomes open, active.
If this is a new step, you use the button "New Step". And the procedure will open a second step by giving a figure higher than the previous one, it will also create a new session in the Notes section giving the date and the same number of the new step, like when opening a new folder.

The button "Delete this step" is present primarily to correct errors, the creation of a second nonexistent step or error.

It is not possible to delete a step when the client has only one step in his file.

If you try clicking the button "Delete this step", a message warns you.

The creation of two files for the same client is possible. It can be appropriate in the some situations like these following.

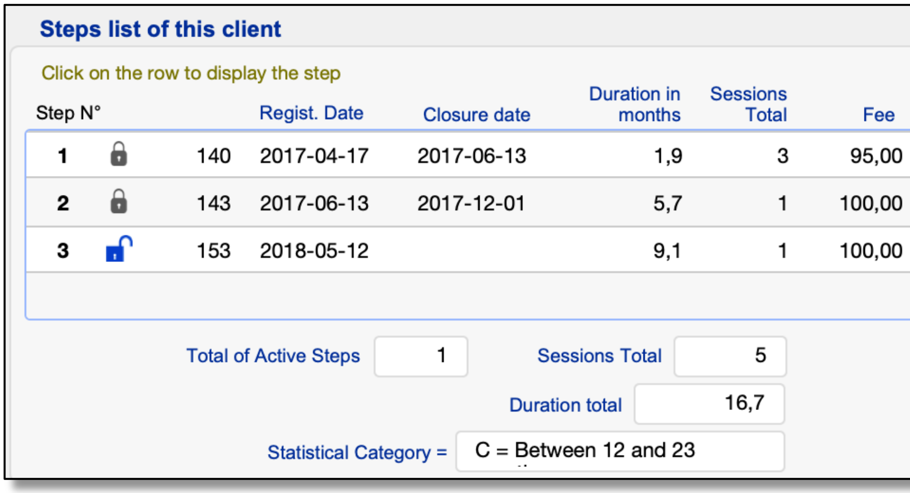
Situation A) :

A client comes in marital therapy. Marital file is opened with the participation of the conjoint. Some time after the end of therapy, the client come back with a request of a individual therapy.

Situation B) :

A client comes in individual therapy long after a first clinical step. But the situation has completely changed and entered information about him is not the same as in the first step. Creating a new folder will allow to enter new data without deleting the old ones.. In this case, it would be useful to add a suffix to the client's name ("2" or "B", etc..) To distinguish the new file in the client list.

When a client has several steps, the list of his steps is displayed. An icon recalls the status of the step (active or closed). As long as the client has an active step, the file remains active, even if it has several closed steps.



In the right side toolbar, two buttons provide access to the list of steps.

The first one is as a list of registered folders, you used to search a file and display it in the same interface.

The second shows another interface where you view all the steps of all clients with the details of each step.

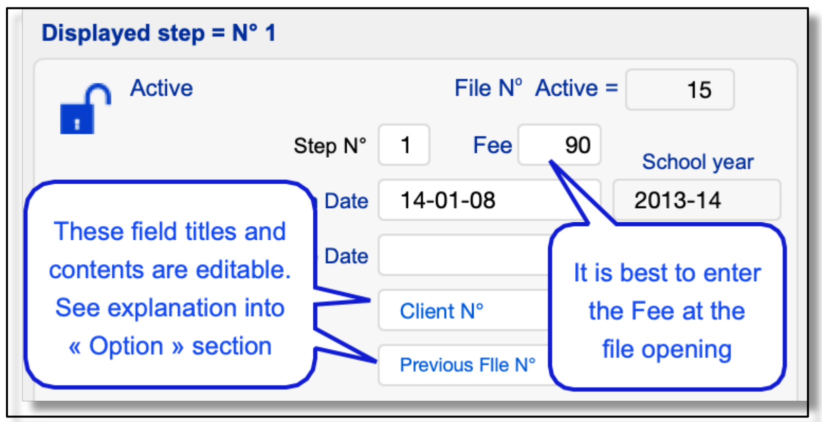
5.3 Entering Data

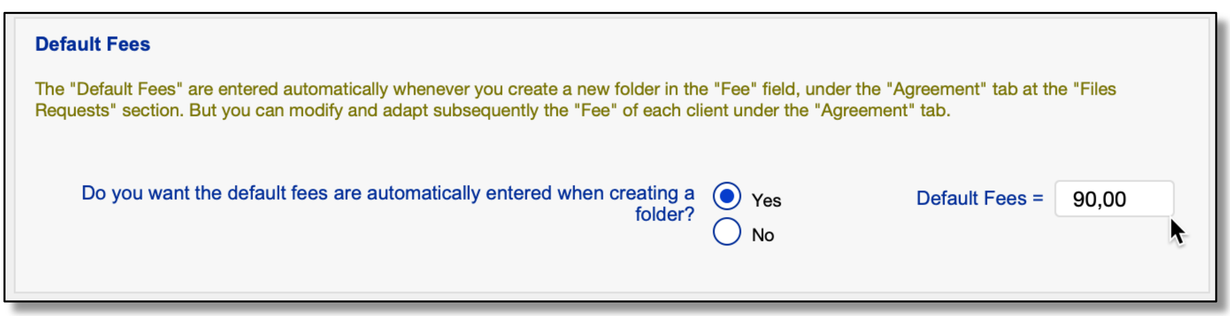
5.3.1 Under the tab « Steps »

The « File N° » is not editable. It is used as a link between several informations on your client in all sections of BaseDPsy.

But you can use two other field to customize the Client File N°. If you import data from a previous version of BaseDPsy, the previous file number will be pasted in the field named « Previous File N° »; If not, you can use it to enter the File N° of a previous paper folder of your client.

The fee will be entered automatically if you use the "Default Fees" option in the "Options" section under the "Finance / General" tabs.

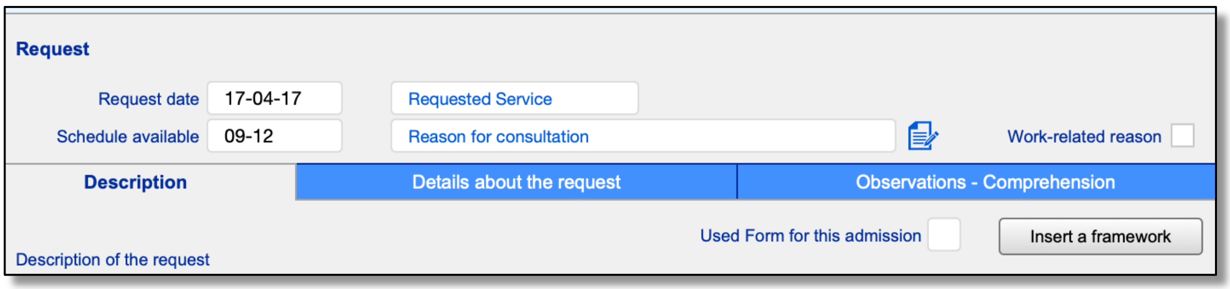




5.3.2 In the « Request » pane.

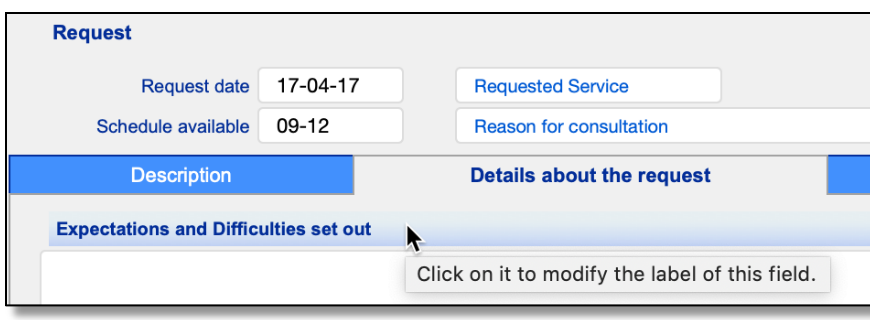
There are three tabs to describe the application: Description, Details about the request and Observations-Comprehension (of demand).

You can indicate the reason for consultation by choosing from a list of editable values, and also check if the reason is related to the work. If you check, the "X" will also be present on the invoice "Auto" and on the claim form N ° 8 (Web) for the debtors



For the "Description", it is possible to use customized frameworks. Its contents are added to the request text during printing and in the first session, if you use the button for this purpose.

Under the others tabs, there are six fields present and you can change the title of all five of them. Just click on the title of the field to change the text. The title of the field will be changed in all records of all clients.



Only the "Reason for consultation" has a non-editable label. The content of this field has a drop down menu that can be changed by clicking on the icon opposite button.

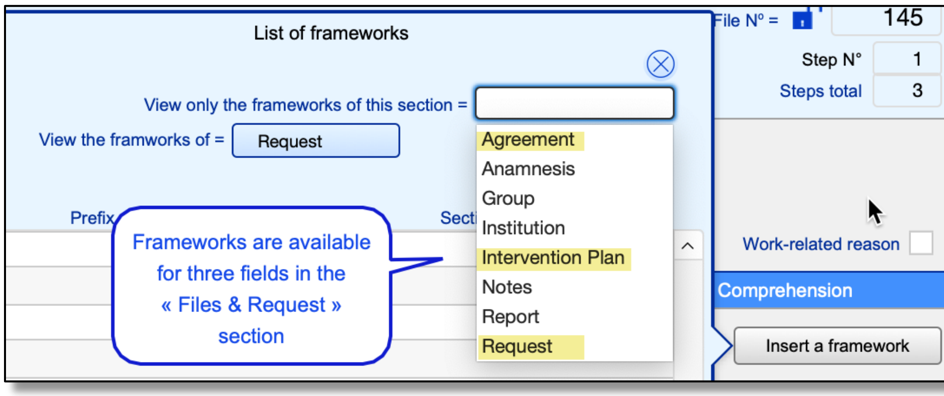
The five other sections are used to enter information and observations made during the guest care ("intake") or during the registration of his service request.

Use frameworks for requested services.

You can use templates for the application, the intervention plan and the agreement, you can also define several templates for each of these headings instead of just one.

Tools for inserting canvas are located under the following tabs: « Request / Description », « Agreement / Service Agreement » and « Agreement / Plan of Intervention ».

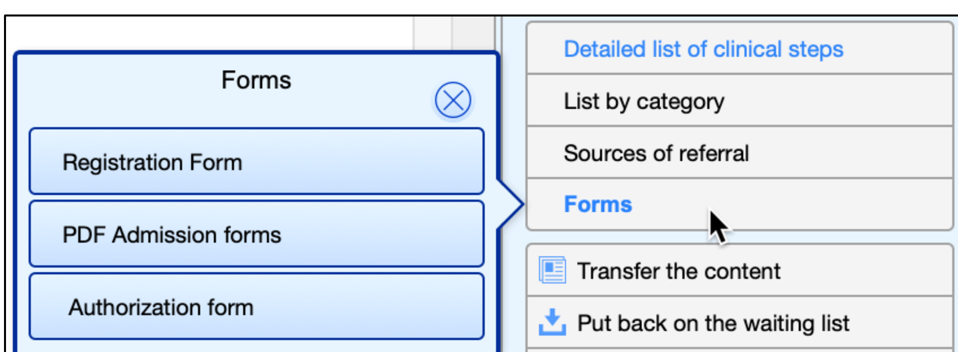
To add or edit canvases, go to the "Options - Preferences" section under the "Writing" tab.



Using Forms

If you want to use a form for this interview, two options are available to you and shown on the buttons title.

The "Registration Form" is a form with five pages, in letter format, which contains all available fields to hold information about the client and its request entered in both sections: "Files-Request" and "Data-Client". It can serve as a reminder for questions at the first interview with your client or use it to take notes of the information that you consider useful to keep in BaseDPsy.



The "PDF Admission Forms" button gives you access to an interface that allows you to keep the content of your own forms. In this interface, four briefcases are available for storing the forms or your clinic, or for storing the Client Response filled forms. The same "blank" forms can be stored in the "Forms Collection" section.

The button "Authorization Form" displays an interface that allows you to customize and print a request for access to confidential information which will be signed by the client or his representative.

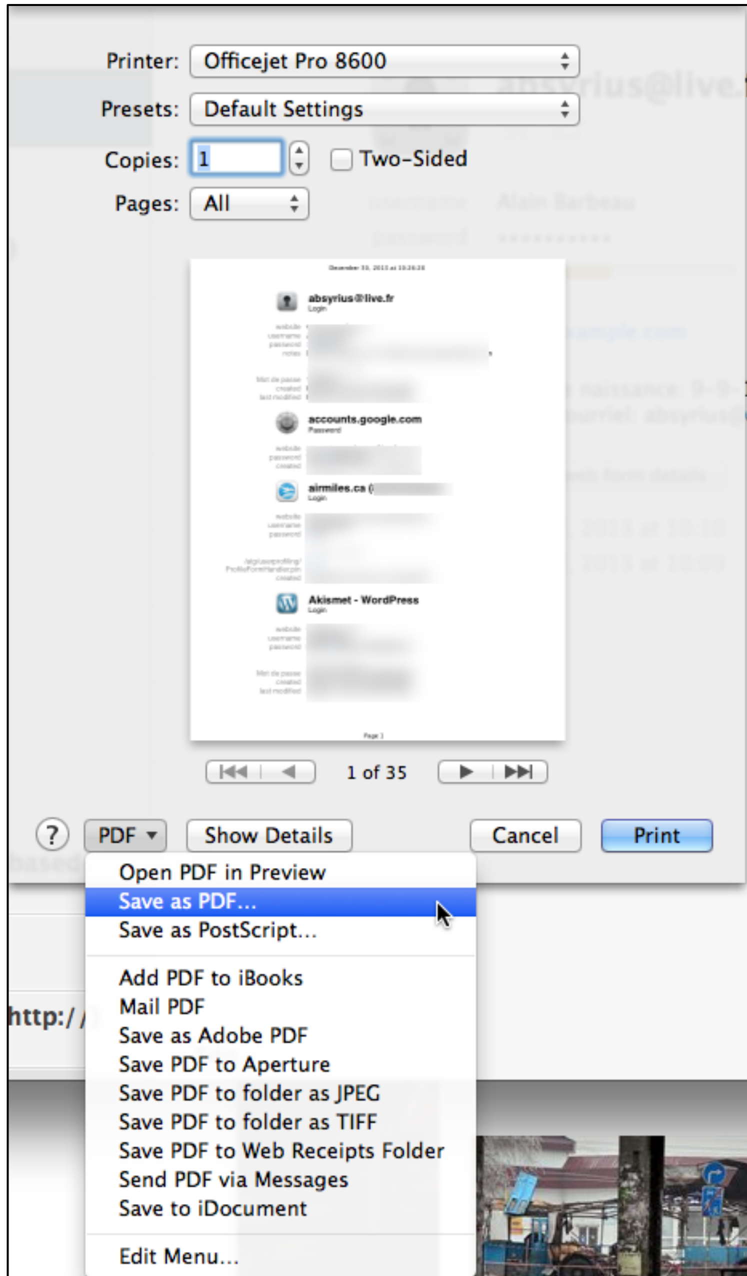
Convert Form to PDF

If instead of printing you convert the Authorization Form in PDF format, you can then send it by email.

This option is included by default in Apple-branded computers. With computers using the Windows platform, you need to install a virtual printer such as [PDFCreator].

On some computers, if you use BaseDPsy without FileMaker Pro, you can convert the PDF document after ordering printing, that is, of course, limited to the characteristics of your computer and other applications available on your computer.

PDF conversion is available with FileMaker Go for iPad. These limits are explained in a chapter on Guide for using BaseDPsy on network or iPad.



5.3.3 In the « Registrations » Pane

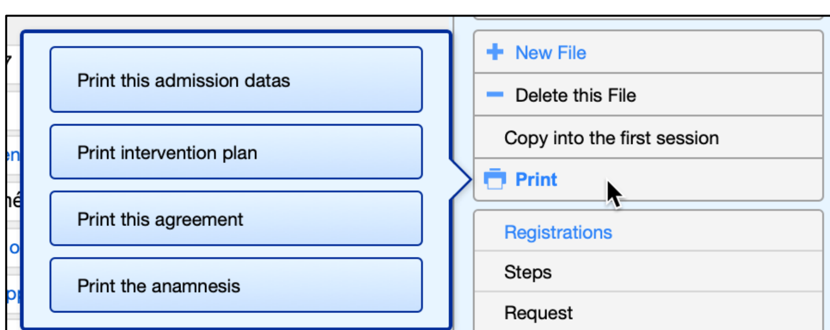
You will find a choice of interfaces is a must, a necessary choice for the good operation procedures in BaseDPsy. The other items are most useful for your statistics on your practice. They have drop down editable menus so as to be filled quickly, especially if you change to restrict the choices available to your preferences and habits.

By entering the amount of the agreed fee with your client, this amount will also be visible in the billing interfaces and will serve as a memory aid.

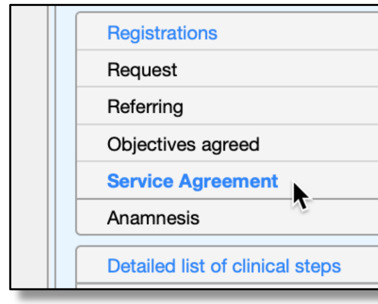
You will also find a text section that allows you to write either the main objectives agreed with your client or your intervention plan.

If you change the field title (Key objectives ...), you automatically change the title of the similar tab.

You can print the contents of what you entered in the "Request" tab and under the "Agreement" tab using either of the buttons on the interface.

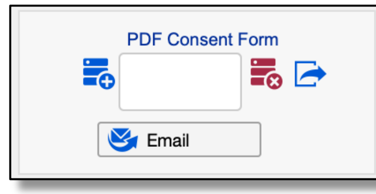


5.3.4 In the Service Agreement pane



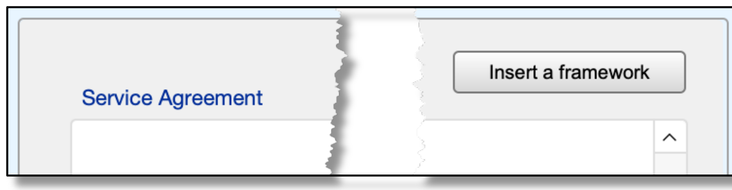
You will see that the pane contains both a section for writing or pasting in an existing service agreement or inserting a writing template and a document holder at the bottom of the pane.

PDF Consent Form

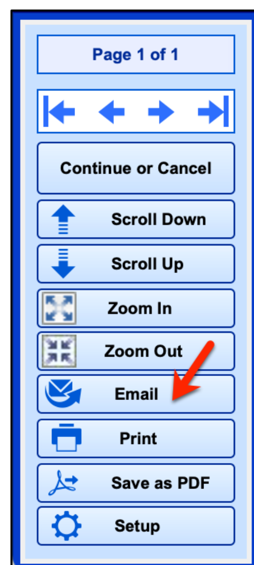


And a document holder to insert a consent form.

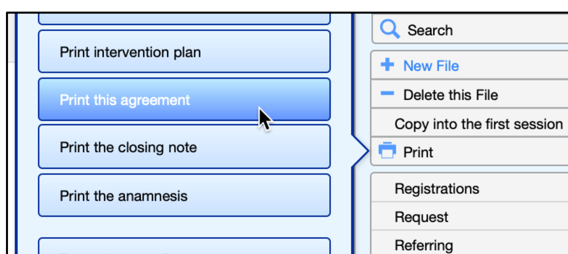
So you have two different tools that can serve the same purpose. The document holder will be useful if you want to send a PDF consent form before meeting the client. But it is also possible to insert a form in another format, word or excel, etc.



If you use the section entitled "Service Agreement", you can either paste a word document or a canvas, and once the document is completed, you can also have the client sign it if you are using an iPad.



You can also send the service agreement or the consent form by email, if you use an smtp address. An smtp address is provided to you free of charge if you use our hosting service.



You can also insert the content of a consent form in the "Service Agreement" section or in your templates.

You can also email the contents of the "Service Agreement" section by clicking on the "Print this Agreement" tool.

When you preview the Service Agreement and if you have a valid smtp address, an additional tool will be present to allow you to email it.

5.3.5 Complete the file in the interface : « Data Client »

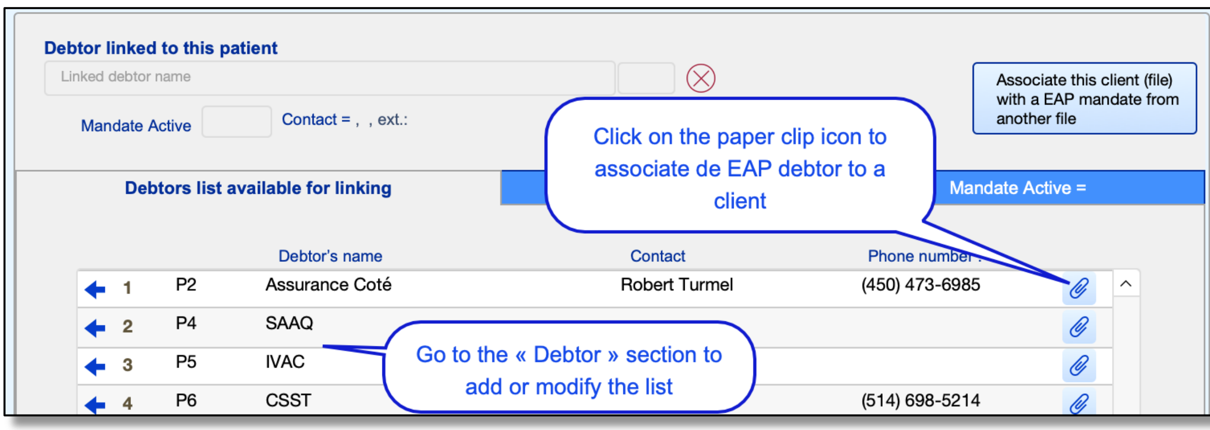
You can then complete the file opening by entering descriptive and personal data on your customer.

Explore the interface and you will surely find enough items available to enter all the information you want to keep.

They are not mandatory, on the other hand, if your client have insured services by an external debtor, you must complete the relevant data on the debtor under the tab so that you can charge the debtor at the time of billing your sessions.

The information entered in the "Debtor" interface remain the same for all clients.

On the other hand, even if multiple clients can have the same debtor or the same insurer, each



customer has specific information that bind the debtor.

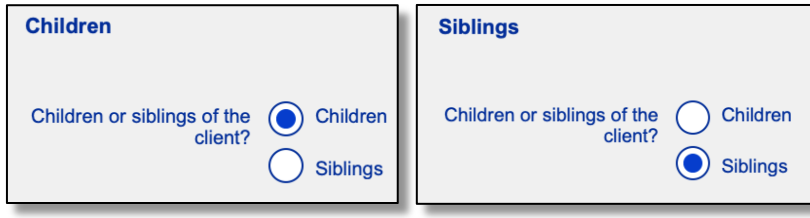
These specific informations, different from one client to another, can be entered under the "Mandate-EAP".

See in another chapter, about debtors invoicing for entering information on the mandate of a debtor.

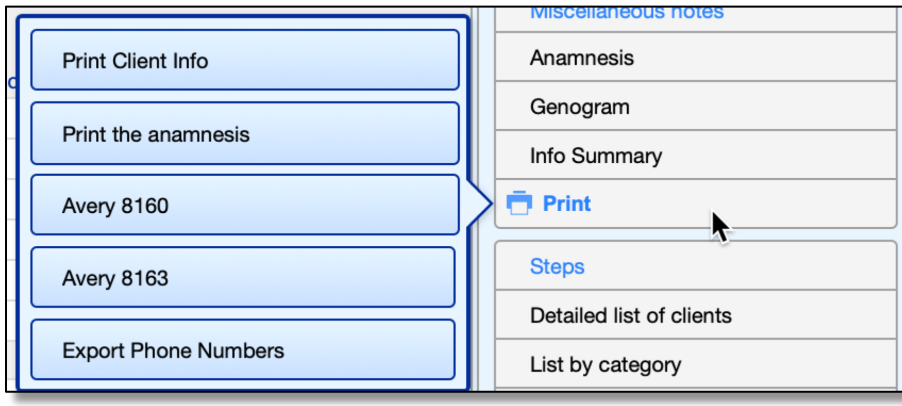
There are several fields to enter all children details.

If the therapy is for children, you prefer probably indicate that the data entered on the children concern the client siblings and not his children.

Just check the option available under the tab to change the title of the tab.



All data entered in the "Data Client" section can be printed using the "Print Client Info" button.

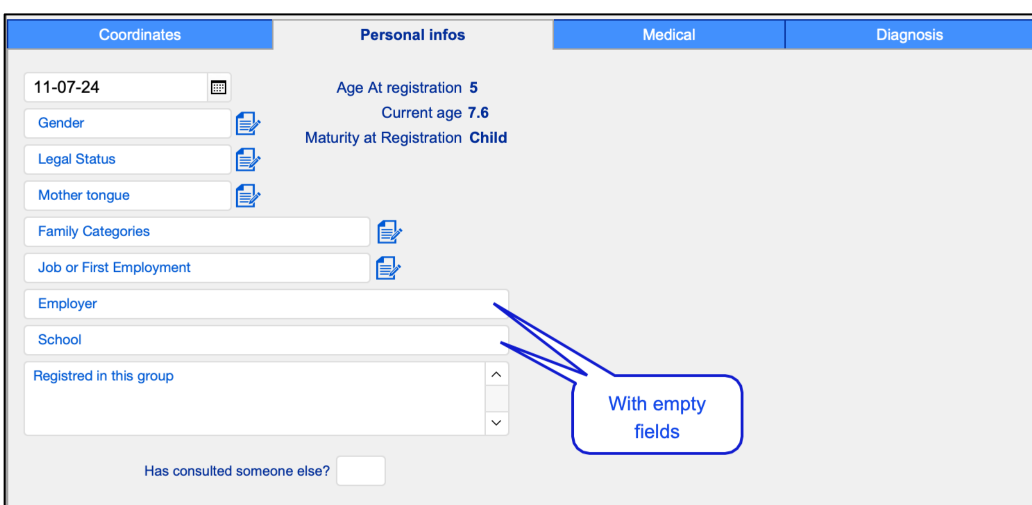


The interface also has other tools that allow you either to print labels on behalf of your clients, or to view a complete list of clients in psychotherapy or a list of references, either to incorporate a "Genogram" in a specific interface.

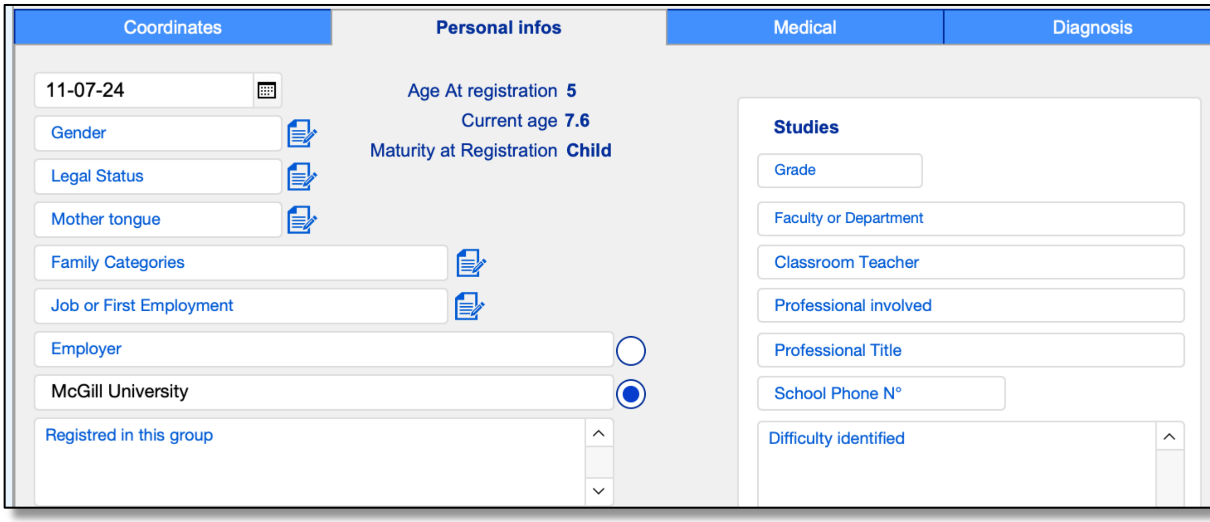
The client « student ».

New sections are used to enter the characteristic data of customers who are pupils or students.

To avoid bogging down the display of this section, the display of these new features is conditional on the existence of a school name.



As soon as you change to another field after entering the name of a school, a table appears containing the descriptive sections of its links to school.

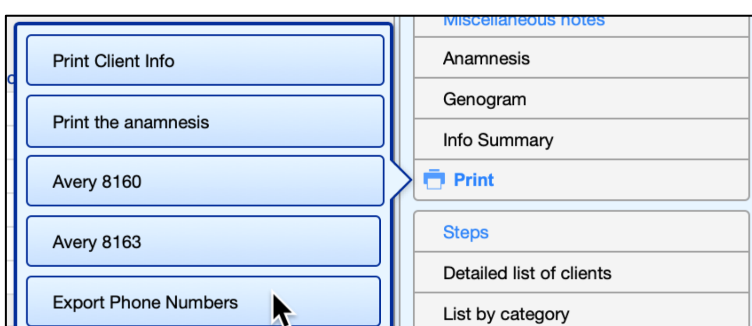


You will see two buttons box also appear: one at the side of the employer name and the other vis-à-vis the school name. As the entries regarding both fields overlap, and therefore by checking one either you can bring up successively the one and the other.

This will allow you to have two alternate information when your adult client is simultaneously a student and employee of a business.

The « Print » button

The print button is a "Popover", that is to say, it displays a window containing tools. We have grouped in it all printing tools and a new tool to export some data entered in this section.



Exporting phones numbers and emails of your clients

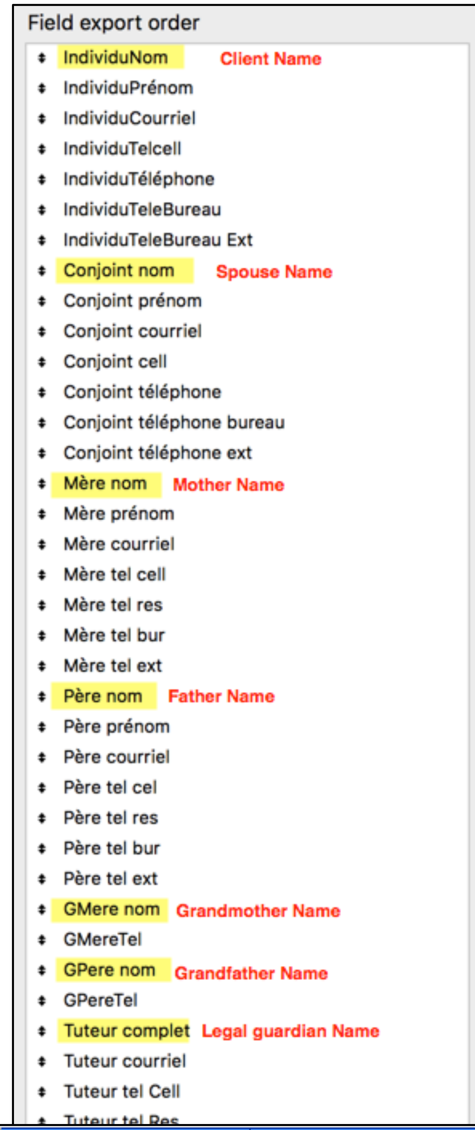
When you view the contents of the "Print" button, you have access also to the tool that allows to export phones numbers.

This is a new procedure which exports all the phone numbers entered in the "Data" and all email addresses.

The procedure will place a document on your desktop with the following name: "TéléphonesBaseDPsy.csv". the format ".csv" allows to import the contents into other programs, such as the Microsoft Office suite (Excel, Outlook, etc.)

However during the conversion of the document the process imports the content of the fields but it does not import the title of the fields. If you import into an Excel spreadsheet, for example, each entry will have a different column, but as the field labels are not imported, you will not have any column title.

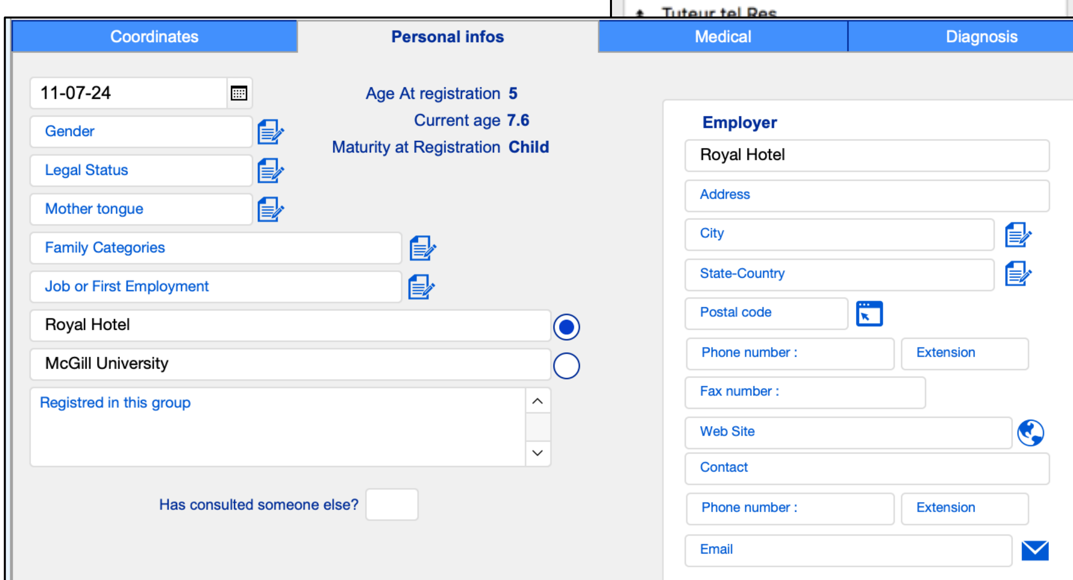
To avoid being mixed and to be able to name the column headings, you need to know the import order which is shown in the screenshot.



Imported into an external spreadsheet, the spreadsheet will have 38 columns, in so far as there is at least one data entered in each category.

For example, if you have never seized data in the field " legal guardian", you will have six columns less.

But the column could also be less in the middle, for example, if none client has a mother with a

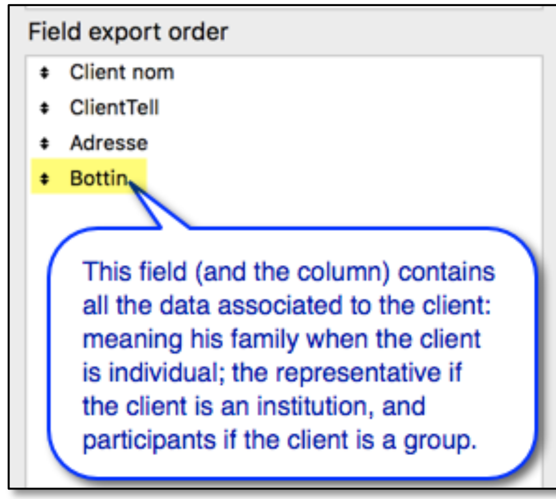


cell phone number, this column will not be displayed.

After exporting, you have so a data recognition work to do.

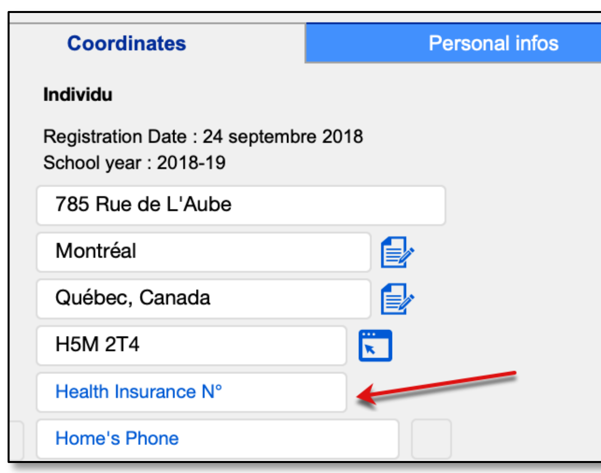
The export of telephone data and email is also available in the "Directory" section, but the content is different, because it restores the contents of the directory, so with only four columns combining data associated persons.

The export order is modeled on the directory display format.



Health Insurance N°

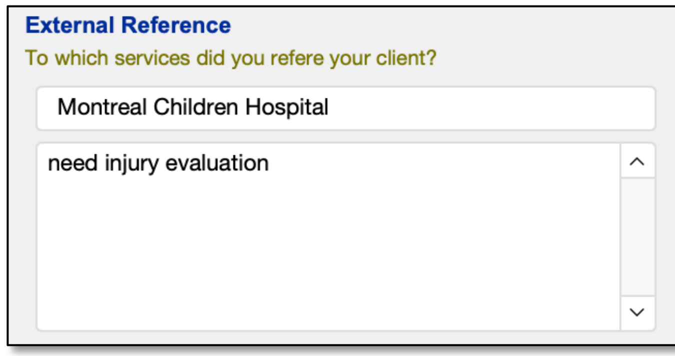
We added a field under the tab "Coordinates" in order to save the Client Health Insurance N° (Medicare) which is asked by some external debtors.



References received and external references made.

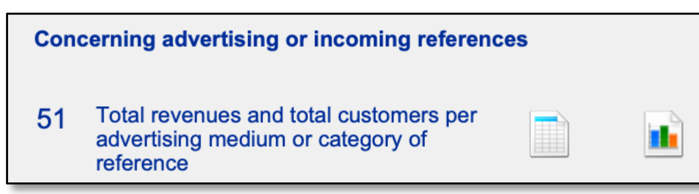
Information on references received is in the "Files" section Under the "Request / Referrer" tab, as it is often at the time of the service request that this information is requested from the customer.

On the other hand, you may refer a client to services other than yours, so we have added headings allowing you to insert this information in the "Data" section under the "Contact" tab and under the heading "External reference".

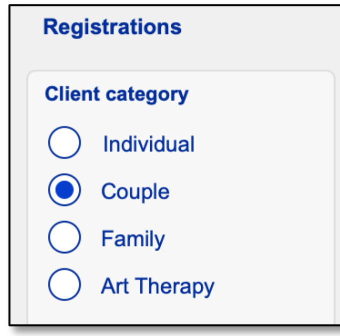


Two statistical tables for references are available under the tab "Productivity" in the "Statistics" section

And another statistical table is available under the tab "Performance"



5.3.6 Marital Therapy File



Spaces for medical and diagnostic information has been adapted to allow to open only one file instead of two for the spouses in marital therapy.

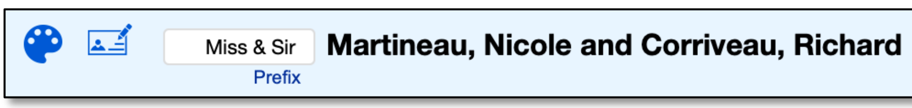
It is up to the therapist to decide whether to open one or two files for marital therapy.

If you open two files, one on behalf of the husband, the other at the name of the spouse, you can then associate them. But to learn the method, see the following chapter: family file.

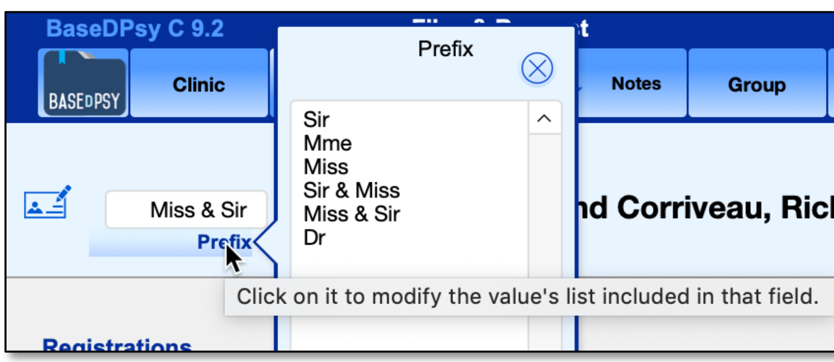
If you open only one, you can enter all important information concerning the spouse under the "Spouse" tab.

In addition, choosing "Marital therapy" as the favourite interface in the "Files Request" section, both names will be displayed in the label of the folder.

It is up to you to use the term "Couple" or « Miss & Sir » as the prefix in the « Data Client » section.



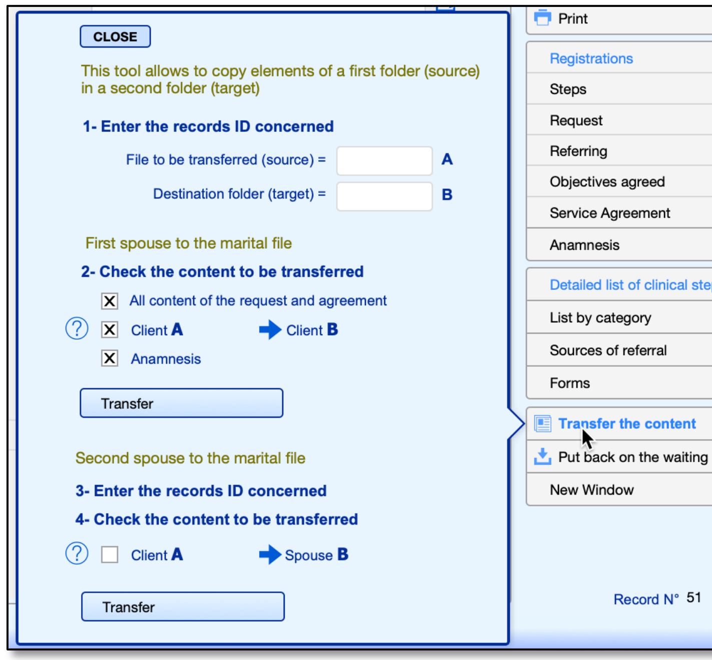
You can modify the list of values of the heading "Title" by clicking on the label.



If you open one folder for a couple in therapy and if at the end only one spouse continues with you in individual therapy, then you can open a new file on behalf of the spouse concerned. As both names were present in the identification of marital record, it will be easy to distinguish both files.

Marital Files and Data Transfer

Addition of a function to transfer the contents of the request and the agreement, as well as the personal information to another file.



That function can be useful in two circumstances:

1. Instead of opening a new approach to a client, you prefer to open a new folder and transfer some information in its second folder;
2. In the case of a couple therapy, you have the policy of opening a file to each partner and a third file for the couple.

In the latter case, here is how to do the transfer:

1. You create a file in the name of the first spouse: (example = Aline Lamarre with the N ° Dossier 112): Tick "Individual" in the choice of interface and enter all the information which concern her in the section Requests and the section Data.

2. You create a file in the name of the second spouse (example = Jim Gordouch with Folder No. 113); Check "Individual" in the interface selection and enter all relevant information in the Requests section and the Data section.

   The information transferred will be as follows:

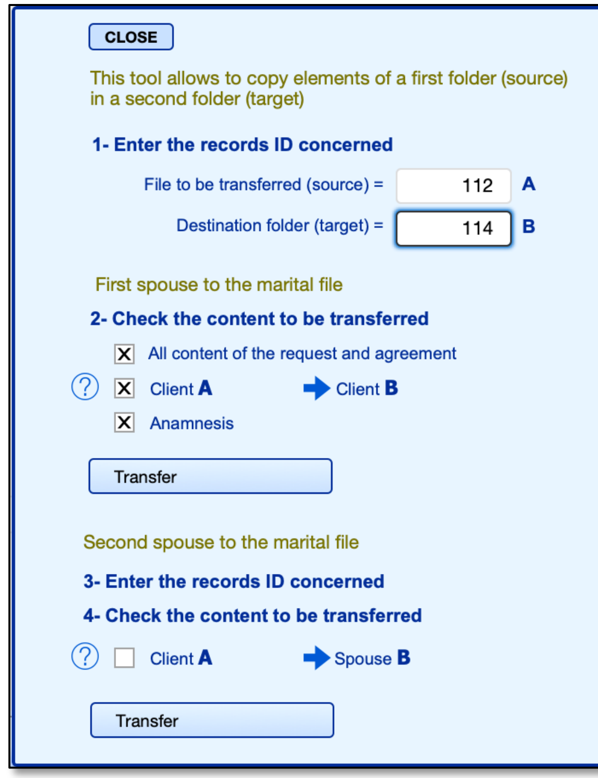
   Box 1 = The content of the application and the agreement;
   Box 2 = The individual information under the "Contact" and "Personal Info" tabs of the "Data" section;
   Box 3 = the anamnesis;

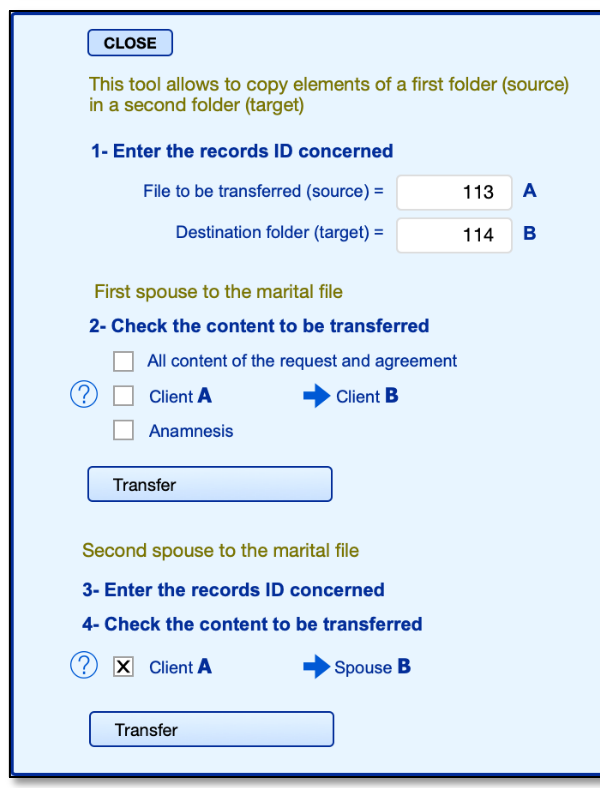
If you have not entered the content of the application or the history, you can check only choice 2.

3. You create a conjugal file in the name of the first spouse (example = Aline Lamarre with the N ° Dossier 114); Check "Couple" in the interface choice and enter only the name of the first spouse.

4. You use the "Transfer Content" function to transfer the contents of the first spouse (112) to the conjugal file (114). In the example, suppose that she was the one who made the request for conjugal therapy and so you have entered in his file the request and the anamnesis. So you check the client A to the client B, the client B corresponding to the marital file. Check only the first three box (All Content ...; Client A to Client B; Anamnesis or only second Client A to Client B)

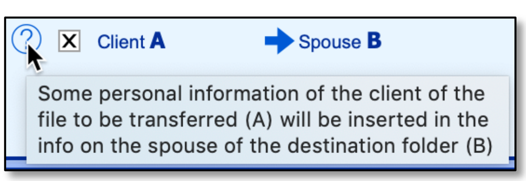
5. Then you use the same function to transfer the details of the second spouse (113) to the conjugal file (114). Check only the last box = Client A to Client B. This will complete the spouse data in the marital record (114) with the data from file 113 (Jim Gordouch) under the tabs "Contact Information" and "Personal Info" of the "Data" section.





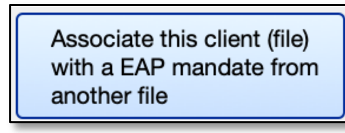
Obviously, before using this function, you must have completed the client information in the "Data" section.

Leaving your cursor on the « ? », It will tell you that some of the personal information will be transferred to where.



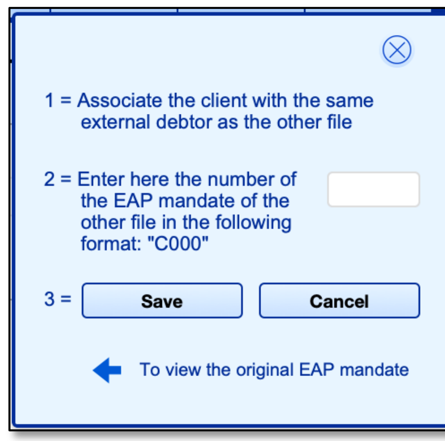
Marital file with the same EAP mandate for both spouses

When you create multiple linked files, such as a couple file and another file for each spouse, it may happen that the couples' sessions and the individual sessions with each spouse are paid by the same debtor.



We have therefore created tools to link several files to a single debtor mandate.

You must first associate the three files to the same debtor, but you create an EAP mandate for only one of the three files. You note and copy the created PAE number, then display the other two records, and save the same Mandate N°.



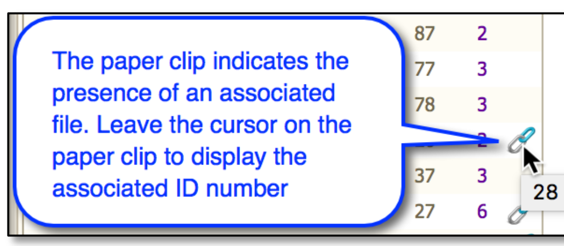
When entering a PAE number in the field for this purpose, make sure that the number is in the format "C00"; i.e. a capital "C" followed by two or more digits.

Subsequently, all sessions billed in either of these files will be assigned to the same mandate, and in the " Agreement with the linked debtor" window of either will have the same information.

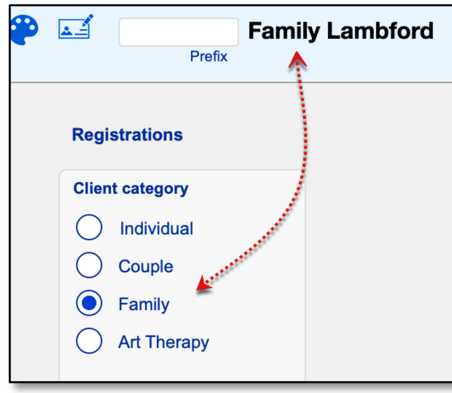
However, only the folder in which you created the PAE mandate will have information detailing the mandate. But, we have also created a tool to display this folder from other related folders.

If the main folder changes to an active PAE Mandate, you will then have to revisit each associated file, use the "Cancel" button, then add the new PAE (Active Mandate) number and click save.

Whenever you save a link between two folders for the same PAE mandate, the procedure also adds a linked file indicator in the clients list with the addition of the paper clip icon, and adds the Customer ID N°. in "Linked files" under the "Family" tab.



5.3.7 Family File

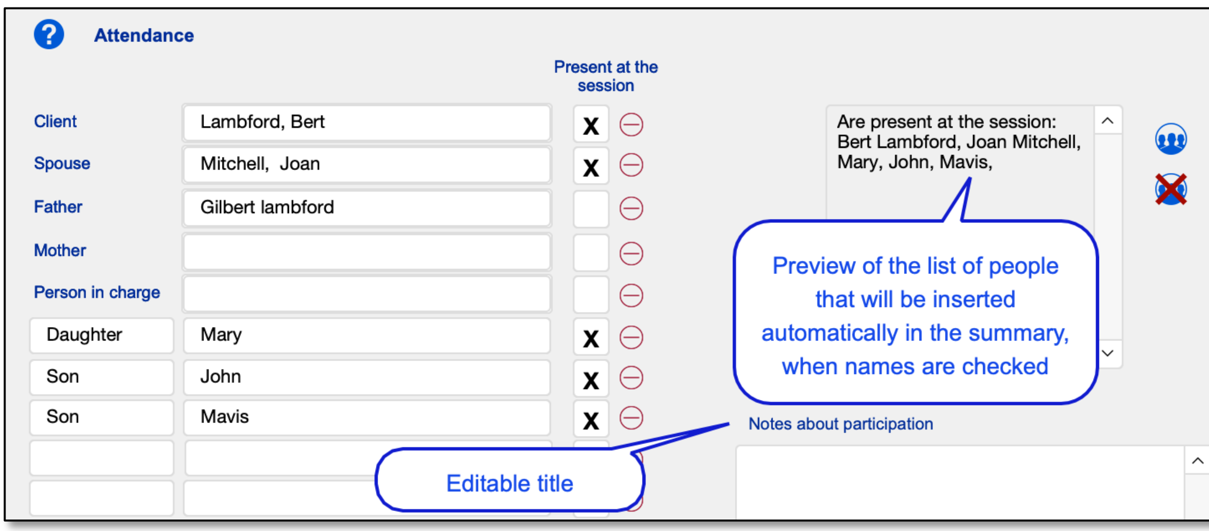


For a family file, you can choose either to open a single folder titled in the name of the family head with the label "Family" in front of the last name instead of last name and first name, or open a file for each member family and to link them.

Opening only one file for all members of a family.

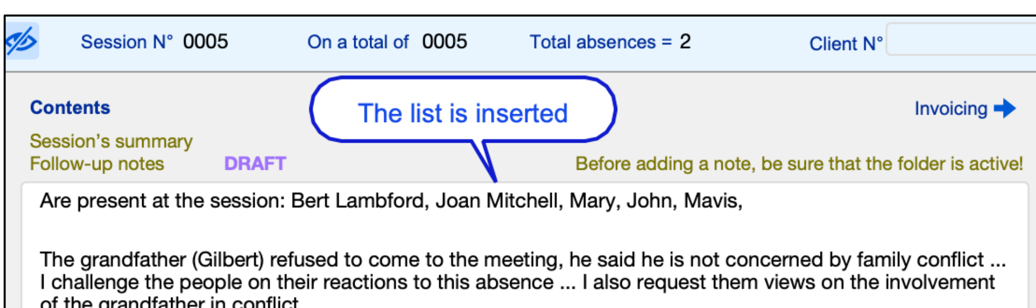
In this case, simply indicate in the "Files Request" section as the preferred interface for notes is « Family » .

In this case, the label of the file will be automatically converted into « Family + the name of the head of family ».



The other advantage of this choice is that when you click a button leading to the "Notes" section to write your interview notes, you will automatically be taken in the interface specialized notes for family therapy.

The advantage of this interface is that it allows you to identify at each session who was present in pointing out only the name. The composition of the group of people present will be automatically inserted into your notes tracking, which allows you to save time of writing. The insertion is automatic provided that the "X" is entered for the presence.

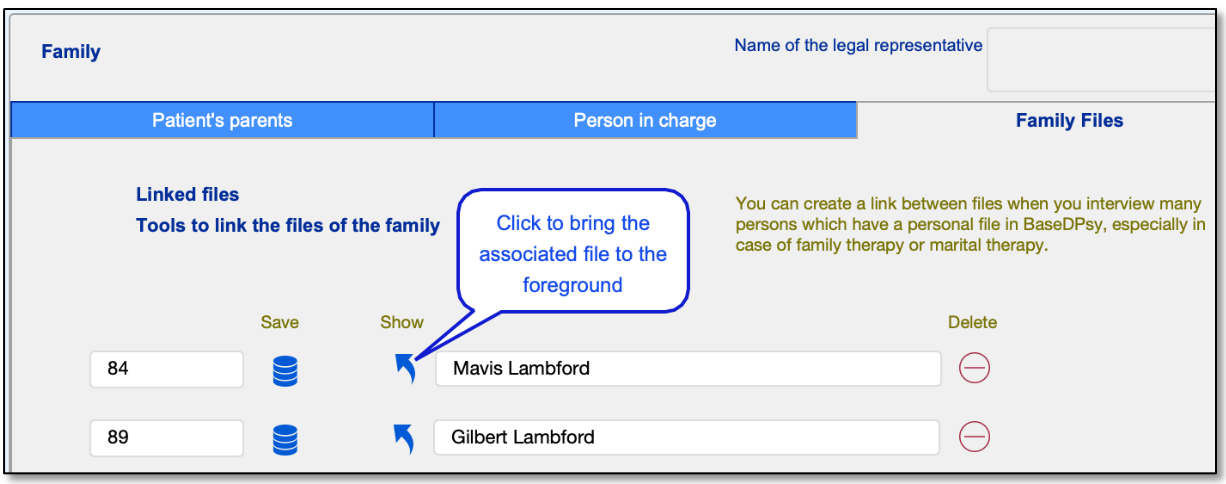


If you choose to open multiple individual records for a family in therapy, you need to manually access this interface, unless the folder of one of the members of the family is saved with "Family" as the interface choice, you will then have to link these files together.

5.3.8 Linking individual files (in relationship) and copy the content of a session in two different folders.

The main advantage of linking individual files together is to write a single note and automatically and to copy it in another folder associated.

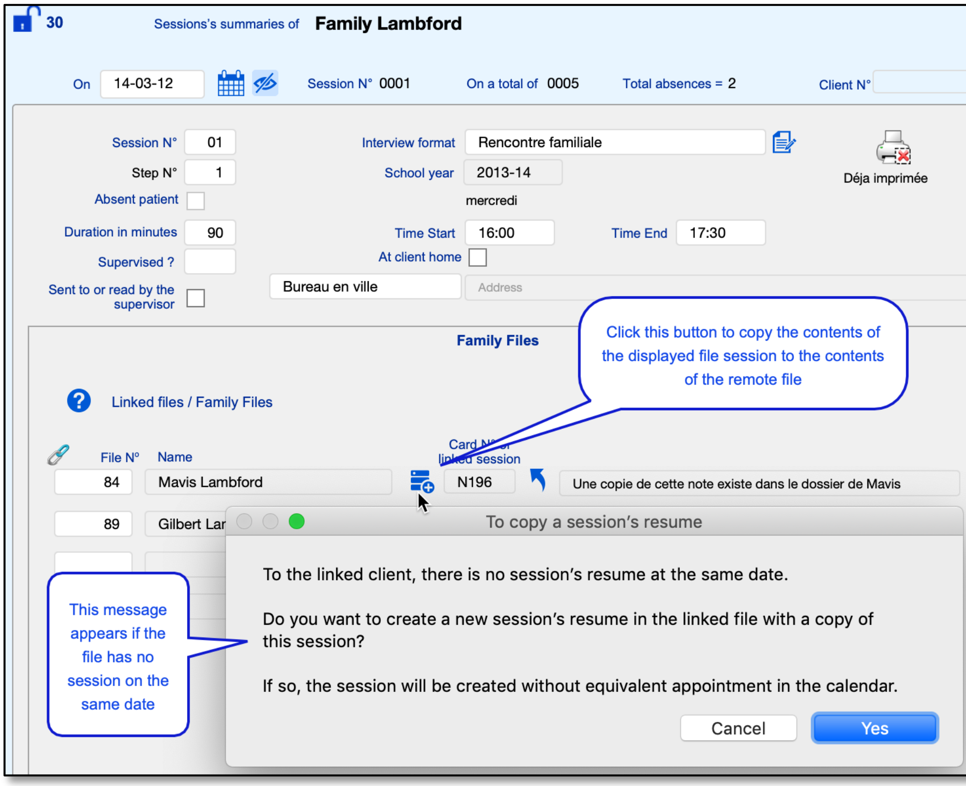
This option can be useful when you simultaneously follow a family and one of family members in individual therapy, or when you prefer to open a personal file to all members of the family therapy.



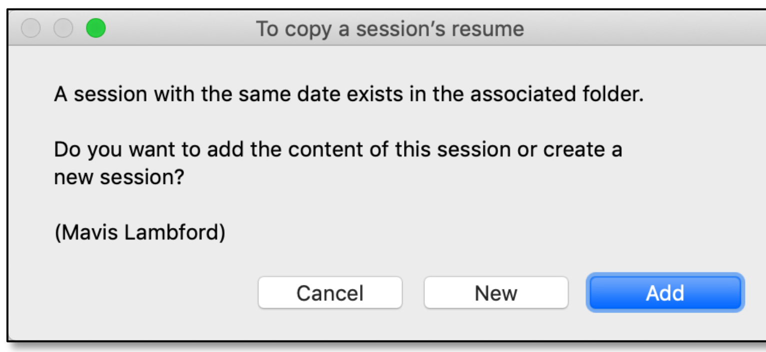
The tools to link many files are in the« Data Client » section, under the tabs : « Family » and « Linked files Family Files».

You manually enter the number of the folder that you want to link to the folder displayed, then you click the "Save" vis-à-vis the same row button. Registration then insert the file name associated in the name section.

In the "Notes" section, the same information is displayed. There is an additional button which allows you to copy the content of the session and paste it in the remote file linked.



If a session exists in the remote (associated) folder with the same date, the message is different.



If you agree to add the content in the existing session, the content will be added after the existing summary. However, you have the choice to create an additional session instead of adding the content to an existing session.

There is the possibility to connect 4 different files between them. So you can copy the same meeting in four other folders for a total of 5.

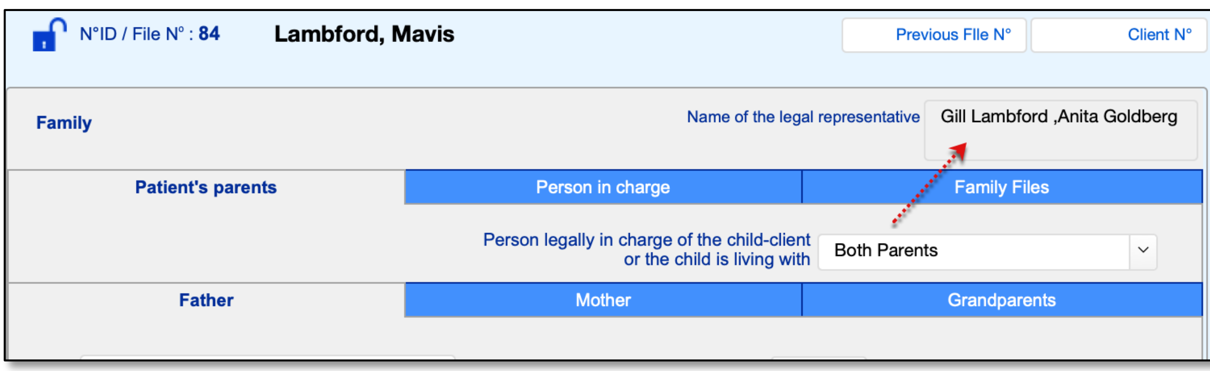
The arrow button let you read the saved copy of the session.

Here is an example of the mention of the copy of the family session with Lambford family in the boy's file Lambford.

Also note that if your client is a child, the name of the guardian appears when you choose with whom the child lives and if you have entered the names of parents or the name of the guardians

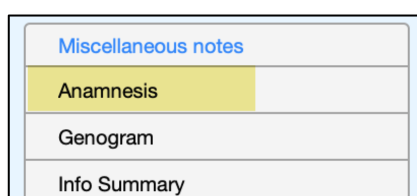
in the relevant sections.

We describe notetaking on therapy and the client's progress and conservation of communications with the client in subsequent chapters.



5.3.9 Anamnesis

In the "Files & Request" section and in the "Data" section, a button also allows you to display a new window to write the anamnesis. You can also plan and use frameworks to write the anamnesis.

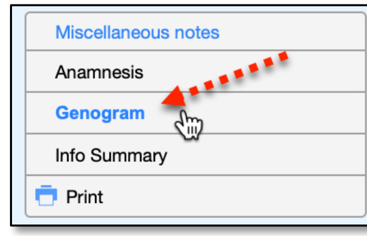


5.3.10 Genogram

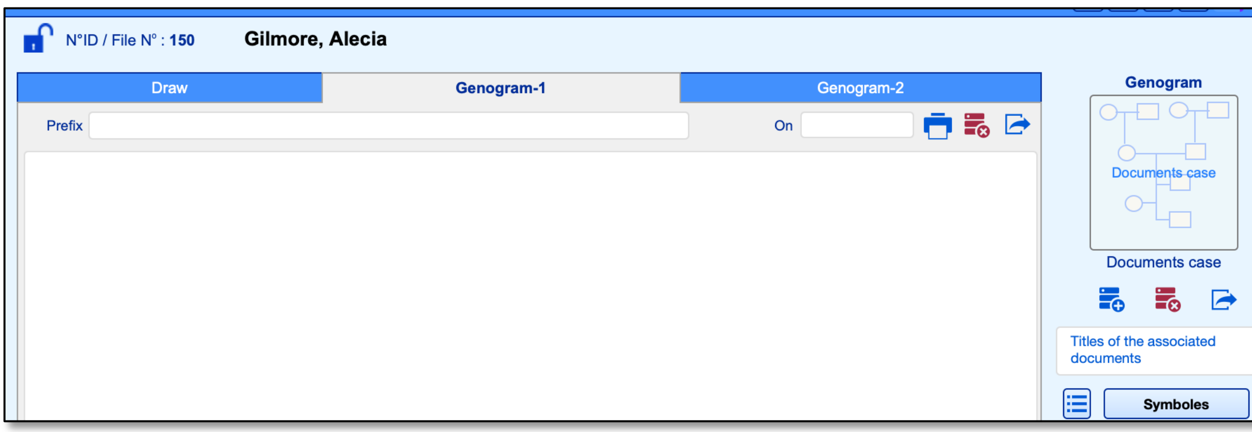
BaseDPsy contains a special section that allows you to keep a genogram about your client.

As of version 11.44, we have also added tools that allow you to draw a genogram directly in BaseDPsy

To display this section, first choose your client, then display the "Data" section and use the tool entitled "Genogram". By clicking on the tool, a new window will appear.

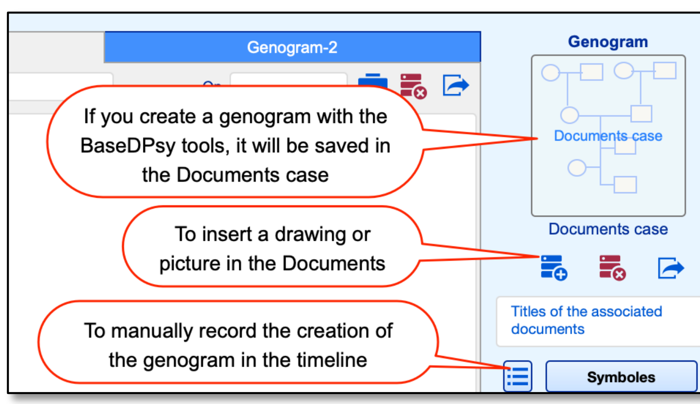


The "Genogram" section contains 3 tabs and a Document Holder.
You can use the Documents case to insert an image of a genogram that you have created outside of BaseDPsy.



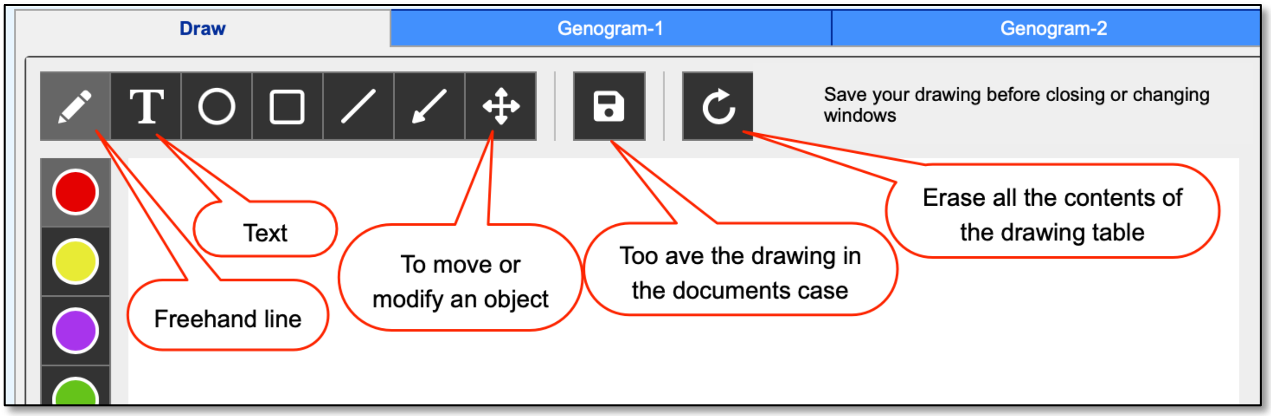
However, if you decide to use the tools provided by BaseDPsy to create a genogram, it is important to transfer, in the space available under one of the tabs (Genogram-1 or Genogram-2), the image inserted in the documents case.

Otherwise, when you save the drawing made under the "Draw" tab, the image inserted in the documents case will be deleted and replaced by the one produced under the "Draw" tab.



To avoid accidentally losing an image inserted in the documents case, you can drag the image from the document holder to the space available under the "Genogram-1" or "Genogram-2" tab or vice versa.

The tool table contains basic tools and a limited color table.



Once the drawing has been saved, you can no longer modify it. You cannot import an image into the drawing table to modify it.

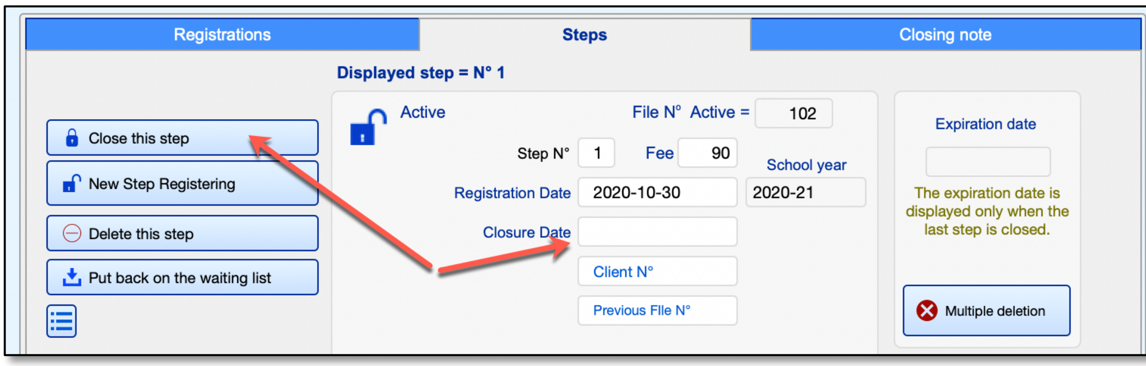
It is important to know that the drawing table is a viewer of a web tool, so if you close the window that displays the genogram, it is like closing a tab in a web browser, the content will be lost, so you must save the drawing before closing the window.

5.4 Closing files

To close a folder you go to the "Folders" section and display the "Registration" pane. Then you click on the tab " Démarches ".

Different tools are present to close the folder :

1. Close this step
2. Click on "Closure Date".

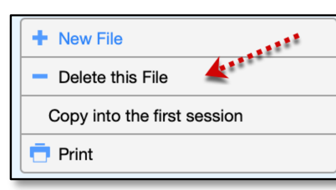


These tools will successively provoke:

1. The insertion of the current date in the "closure date"; the date can be modified afterwards;
2. The addition of a note in the chronological record of the file if you have activated the automatic procedure;
3. The display of the "closing note" section.

5.5 Deleting folders (client files)

A client file created in BaseDPsy can be deleted manually, one at a time. Just use the tool for this purpose.



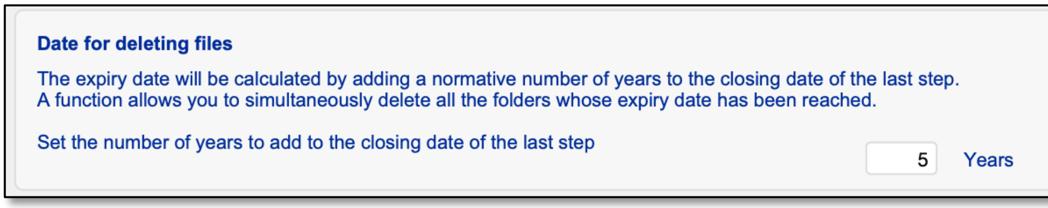
Deleting a client file in the "Files" section erases everything: the process registration, the person data, the progress notes and the corresponding invoices.

The deletion of a file is final. It is completely impossible to cancel deletion and retrieve deleted information.

When you delete a file, its number is also deleted and cannot be recovered (re-used).

5.5.1 Out-of-date file

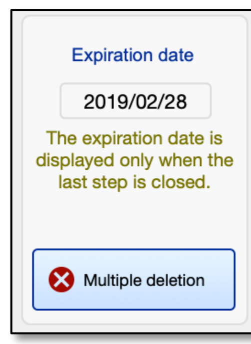
Certain rules of professional orders or state laws may require the removal of a closed file for some time. This legislated limitation[1] time is named "Retention Period" in BaseDPsy, and you can set the number of years of retention in the "Options" section under the "General / Files" tab.



Since it is possible that you have several files whose expiration date is reached in the same year, we have added a procedure that allows you to delete several client files simultaneously.

By clicking on the "Multiple Deletion" tool, the procedure will search for and delete all the files whose "Expiration Date" is equal to or earlier than the current date.

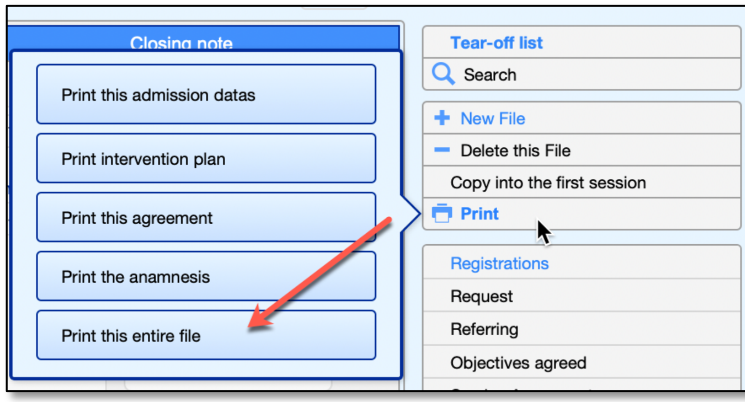
Note that the expiration date is only displayed if the client file is closed and all the steps in the same file have a close date, which gives you extra protection to avoid deleting folders by mistake with the "Multiple Deletion" tool.



[1] A psychologist shall keep each record for at least 5 years from the date of the last professional services provided.
O.C. 448-92, s. 8. chapter C-26, r. 221
Regulation respecting the keeping of records and consulting-rooms by psychologists, Professional Code (chapter C-26, s. 91) Québec Canada.

5.6 Additional Tools

5.6.1 Printing the entire file

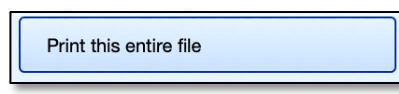


In each section of BaseDPsy you will find a tool that allows you to print each element of the folder.

Thus, in the "Report" section you will find a tool to print the report as well as in the "Communication", "Notes", etc. sections.

In the "File" section, you will find a tool for each of the elements included in this section: Application, intervention plan, service agreement.

However, it may happen that you receive a request for the entire file, for example from a court, a professional order, or even from the client, etc.



We have therefore added a tool that allows you to print the entire file. The printing order is as follows:
a) The psychological report
b) Non-therapy communications (messages)
c) Follow-up notes
d) Anamnesis
e) The Service Agreement
f) The intervention plan
g) The service request
h) The client's descriptive summary (data section)

The printing order has the effect that the customer's description will be on top of the document.

However, before binding it, take the time to check the page orientation to compensate for the vagaries of a printer.

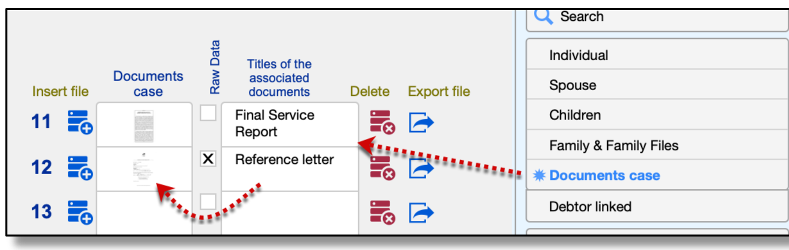
For each step, you will have to confirm the printing, it's a bit annoying, but it is necessary to do so in order to give you the choice between printing on paper or printing in pdf format.

5.6.2 Inserting files and documents in BaseDPsy

In almost all interfaces BaseDPsy you will find a pane or a space named « Documents case »

In the Data section, we added a check box to identify documents that are raw data; A notification specifies that the transmission of the document to a third person or to a body is governed by a code of ethics. The notification is displayed when viewing the document; and the raw data ethics rule has been added to the information available in the question mark.

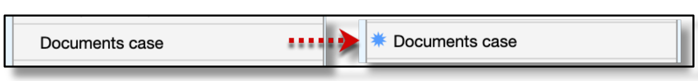
Many Documents cases are available in the main interfaces to allow you to insert documents. These documents can be evaluation reports obtained from a colleague, a doctor or documents created by the client himself.
In that pane, there are one or more briefcase that allow you to insert in BaseDPsy documents produced by other software. You can insert PDF documents, JPEG, audio, word, etc.

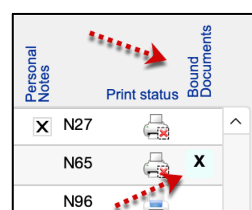


This is very convenient for you to keep such medical reports, evaluation reports made by you or another health professional, etc.
This also allows you to not have a holding of parallel files. In addition, you can view directly in BaseDPsy, PDF documents or type of photo or video, and you can hear the audio document type. Their use is rather simple: a button to insert the document and a button to clear the contents: the document and its title.

Note: If you have inserted an interactive document as a picture, a PDF document, a video or an audio file, you can view and read the document directly in BaseDPsy by clicking on it. To read text documents, such as Word, you must export them to the desktop and open them with another software.

When a document is inserted, a star is added to the "Documents case" tool to serve as a notification when the Documents case flap is not in the foreground. It is also present in the list of follow-up notes (Session List).





As there are many "Documents cases" in several interfaces, you can specialize the uses at your leisure. For example, you can use the Documents case in the "Data Client" interface for reports from other professionals, briefcases of the "Notes" interface for the documents provided by the client, Documents case in "Messages" section for files associated with emails, etc. .

In the interface notes for clients in art therapy, there are more 10 Documents case for work done for the client session.

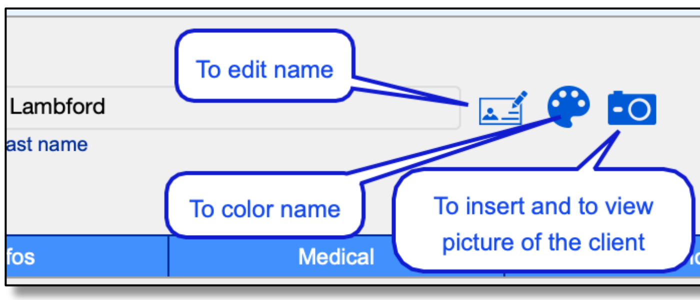
There are also other briefcases specially configured for specific uses. As « Genogram » interface or space for the client picture in the « Data Client » section.

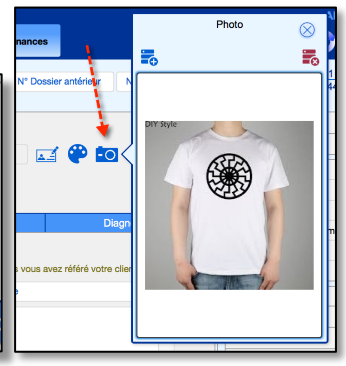
5.6.3 Psychotherapeutic Files Coloring

Usefullness

With the new version of BaseDPsy 6.3, it is possible to color the name of the files holders. The clients names in psychotherapy, after staining, appear in color in the lists of clients.

The interest thing for some practitioners is that they can recognize at first glance, at which clinic is attached the client, or at which aid program or debtor is linked the client, or what type of client (individual, family, couple, child, etc..) is the client with viewed color ... etc..





Caution

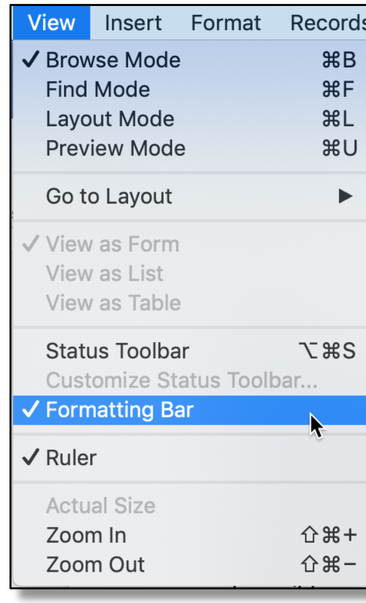
In BaseDPsy, there is a tool (button) specially designed to change the name, and another to change the color of the name. But you can not change the color of the name without making the name itself editable.

However, when you view the interface to change the color of the name, it should absolutely not change the spelling of the name at the same time.

The reason is that the client name is found in several interfaces and only tool to change the name contains the procedure to change the name in all interfaces.

That is why when you use the button to color the client's name, a notice to remind you the spelling of the client.

Procedure



By clicking on the colored prism shaped button, a new window appears with the editable fields of the first name and the name of client, allowing you to color them.

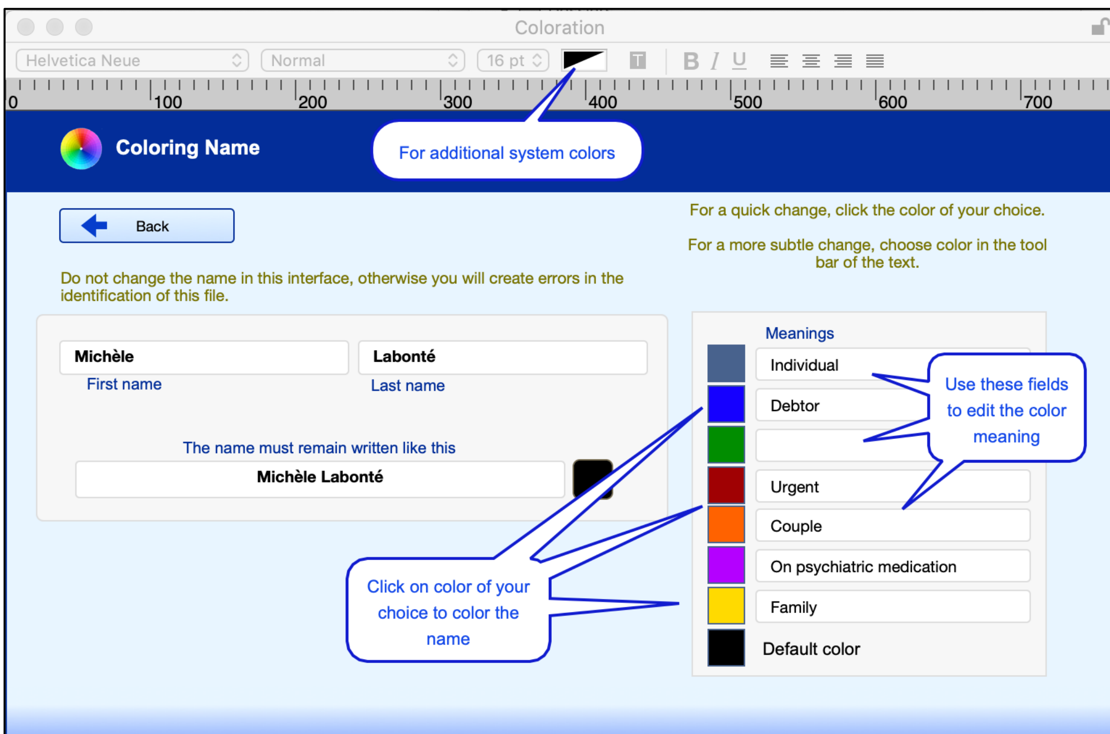
The different meanings of the seven preset colors are at your discretion.

To use additional colors than those already offered by default, you must display the text bar. On MacOS, the text bar may not be displayed automatically.
Then use the "View" header menu and click on the "Formatting bar" submenu.

If you use the additional system colors, select the name and the first name before to change the color, but you won't be able to record its meaning.

When you are finished, click the green arrow "Back"

You must always close this window. Never leave it open.



5.6.4 Chronological record of acts performed in a file

Logbook

The creation of a chronological record of the acts carried out within a file is ideally done automatically as soon as a file is opened.

But as this function is introduced in version 10 of BaseDPsy, it is therefore foreseeable, for several hundred users, that many files are not only created long ago but even closed.

So we had to imagine two different ways to proceed:

1. A manual way that creates posteriori the chronological record of the acts performed. 2
2. An automatic procedure that starts the chronological record as soon as a file is created.

We also anticipated that the automatic statement could be incomplete, especially in the "Client Communications" section where it is possible to add messages or discussions after the creation of a record, therefore we added:

3. A manual procedure for adding a record to the chronological record in each of the "Customer Communications" sections.
4. And a manual procedure for adding a deed to the actual list in the statement.

For example, suppose you want to add a paragraph in the client's anamnesis, and you want to insert a record in the chronological list to mark that you have modified the anamnesis. You will then be able to make an addition within the chronological record itself. In addition, this tool will be useful when you want to add a line to the chronological record when the automatic addition cannot do so because it has already made an entry before.

The icon of the tool for the manual addition of an act in the chronological list of the file from a section of BasDPsy is this one.
This tool has been added in each section.

Conditional automatic deletion of acts in the statement.

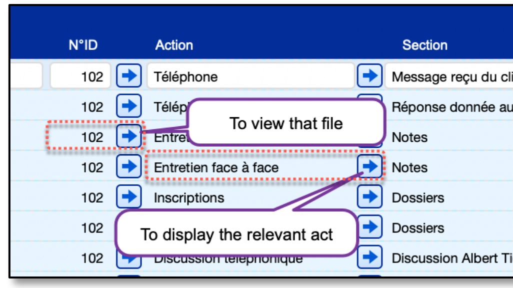
It is also important to remember that if the source of an act recorded in the roadmap is deleted, its mention in the statement will also be deleted. For example, if you have added a session, this act will be added in the roadmap, if you delete the session afterwards, the corresponding act will be automatically deleted in the chronological record.

Conditional automatic deletion of acts in the statement.

When you delete an item from the list, the link that links this item to the act is removed, which then allows the act to be added back to the list with the available tools.

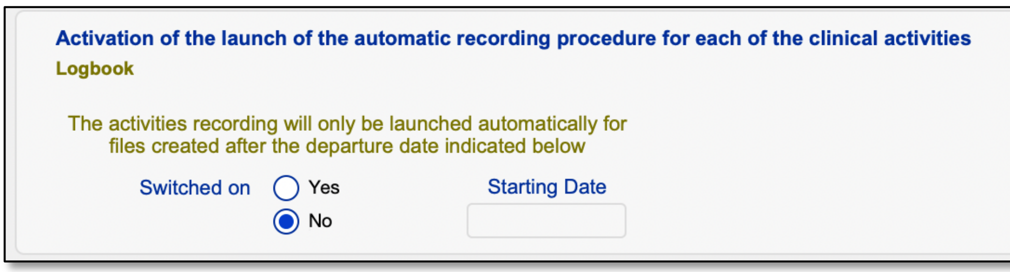
Re-display the act at the origin of its mention in the list

Arrows to the right of the folder number or to the right of the action allow you to display the original act.



Activation of the automatic chronological logging procedure

In order for each follow-up note created in BaseDPsy or any other activity in BaseDPpsy to be automatically entered "at the time of its creation" in the roadmap, the procedure must be activated in the Options section.



When you activate the automatic chronological record in the "Options" section, a start date is added (today's date). All (new) folders that you will create from this date will be included in the automatic statement creation.

A notice of the activation will be displayed in the relevant files under the tab "Registration".

Attention:
The activation of the automatic procedure will result in a slight slowdown of your navigation for the concerned (activated) folders, because the statement will be made before displaying another section.

Complete creation of a chronological record

For all the folders created before this start date, the automatic statement will not be done, it will then be necessary to create it manually using the tool for this purpose in the "Folders" section.

Note that it is not necessary to have activated the automatic chronological logging procedure to use this tool.

Before using this tool, make sure that all the mandatory fields when creating the report have a content: see details on the next page.

With a closed or open file, without having activated the automatic statement in the Options section, you can create in one go the chronological sequence of the actions taken for this client.

If you find that information is missing from the chronological record, you can view the record and create it manually with the bulleted list tool; or use the "Create chronological record" tool again. This tool will add the items added to the file and not included in the record.

The procedure is designed to avoid the duplication of an act already recorded in the statement.

We know that some users of BaseDPsy do not immediately complete the sections of the notes they add to a client's file. Therefore, to prevent a note from being added without content, we have added conditions to the addition of an act in the statement.

Fields that must be filled to be able to add an act in the chronological list

Remember, for each section, the headings that must have a content for the automatic procedure to be launched.

MANDATORY HEADINGS IN THE FILES SECTION :
a) The date of registration
b) The name of the customer

Even if the client's name is entered automatically when a file is created, it can happen that an error in the Data section deletes the name, resulting in an entry error.

The automatic procedure is started when the file is created and when the file is closed.

MANDATORY FIELDS IN THE NOTES SECTION :
a) Date of the meeting or intervention
b) The interview format (which defines the act itself)

Limit of automatism :
The automatic procedure is launched when the note is recorded.

Since the date is added automatically when a new session is added and that this date can be modified after the session is added, it is mandatory that the automatic procedure be done when the note is saved and not when it is added. However, if you add or modify the text of the abstract afterwards, the addition of the act will not be done automatically; if you think it is necessary to add an act to the list, you will have to do it manually.

MANDATORY FIELDS IN THE CUSTOMER COMMUNICATIONS SECTION :
In the Customer Communications section there are 5 different message spaces:

1. The message
2. His response
3. The message to a third party
4. The response of the third party
5. A discussion

So there are 5 acts available, to avoid that 5 acts are added when you create only one telephone call summary, for example, we have set conditions to the addition of an act, whether the addition is manual or automatic :

The act will be added to the chronological record only if :
a) There is a date in the date of the message
b) You have defined a message category (phone, email, etc.)
c) You have entered a content in the message field.

Limit of the automatism :
The automatic procedure is launched when you leave the " Customer Communications " section.

MANDATORY FIELDS IN THE REPORT SECTION :
a) The date of the report
b) The title of the report
c) The category of report

The automatic procedure is launched when you exit the "Clinical Report" section.

MANDATORY FIELDS IN THE GROUP MEETING SECTION:
a) Date of the meeting
b) The client was a participant in the meeting

Please note, however, that group meetings will only be inserted if this client has participated in a group meeting.

The automatic procedure is launched when you leave the " Group Meeting " section.

MANDATORY FIELDS WHEN CREATING AN ANAMNESIS:
a) The date of writing
b) Content

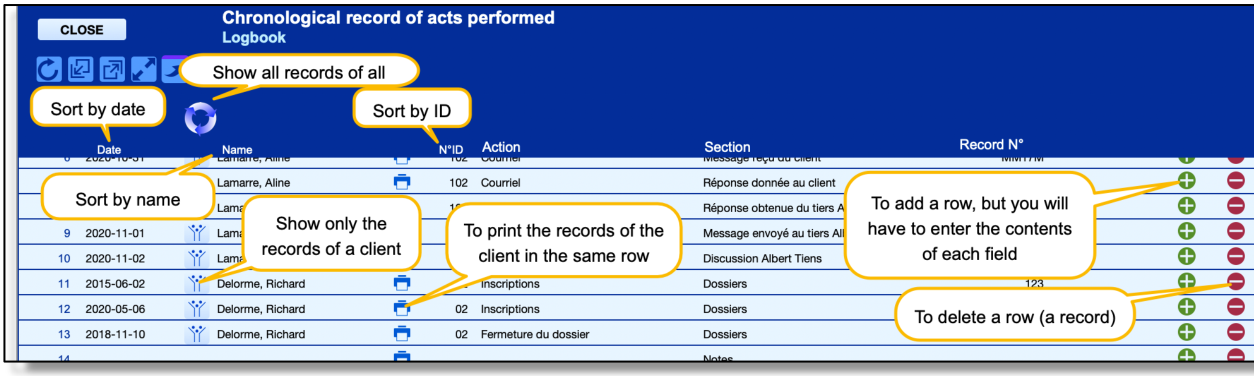
The automatic procedure is started when you close the window.

MANDATORY FIELDS WHEN CREATING A GENOGRAM:
a) The creation date
b) Content

The automatic procedure is started when you close the window.

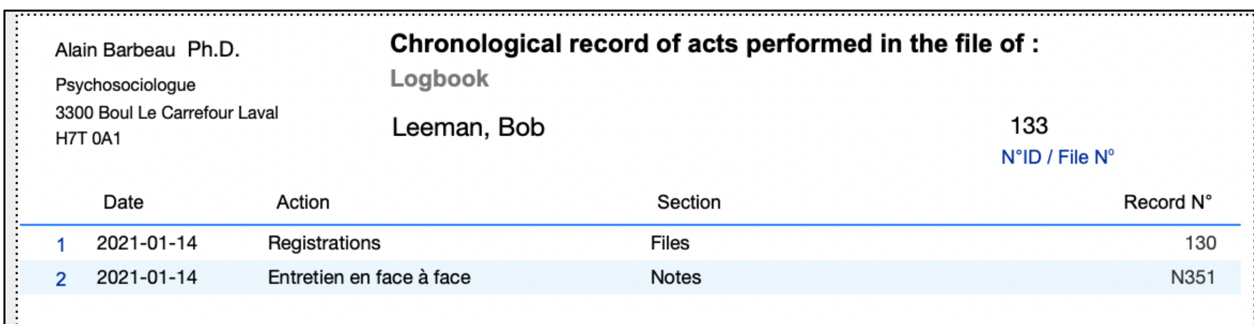
Display the chronological record

When you use the tool to display the chronological record of proceedings in the "Records" section, the tool will automatically filter the proceedings to display only those that are relevant to the displayed record, unless the roadmap has not been created for that record, in which case all the proceedings from all the records listed in the "Record" section will be displayed.



Print the chronological record of proceedings

When you click on the printer icon on a line in the list, it automatically starts the procedure for printing the acts in the folder corresponding to the same line. The list of acts is sorted in ascending date order.
Here is what a printed list looks like


Alain Barbeau Ph.D.
Psychosociologue
3300 Boul Le Carrefour Laval
H7T 0A1

Chronological record of acts performed in the file of :
Logbook

Leeman, Bob 133
N°ID / File N°

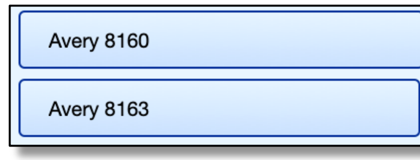
	Date	Action	Section	Record N°
1	2021-01-14	Registrations	Files	130
2	2021-01-14	Entretien en face à face	Notes	N351

5.6.5 Mailing Labels

If you need to mail documents or invoices to your customers, you can print labels in two formats "Avery."

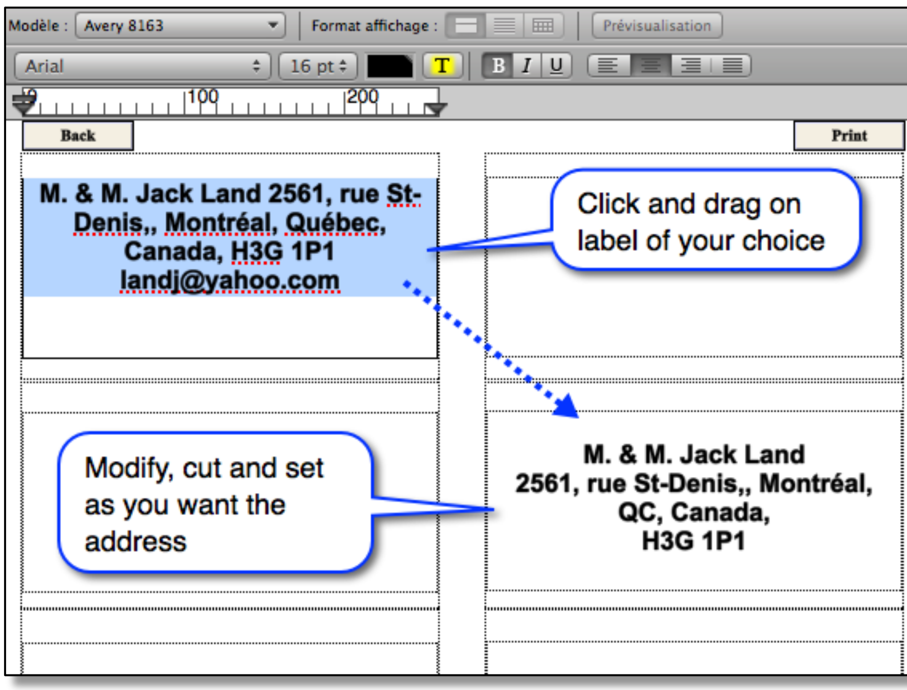
By clicking on one of two buttons, the name and full address of the client are pasted to the first label from the top.

But you can move it in any space and change the formatting and content.



The client address is pasted into the first label of the interface in a format that meets the standards of the US and European postal services.

To make a choice between these two types of standards, go to the "Options" section under the "International" tab.



5.7 Files creation for institutional clients

Creating folders for services to organizations or institutions is independent of creating folders for psychotherapy clients.

The « Institutional Clients » section has been designed to be versatile. It makes it possible to create folders and make notes, regardless of the nature of your relationship with the organization.

Whether you are

- consultant to the organization,
- speaker with an association,
- lecturer in an educational institution,
- that you will intervene as a psychosociologist or analyst institutional
- or responsible for any action different from psychotherapy, as postvention, intervention in crisis situations, etc.,

you can create a file for your work at the organization and enter your mandate as well as the notes on your work in or with the organization.

Remember that an institutional file is composed of several parts:

1. Descriptive record of the organization;
2. The mandate given to you by the organization; however, the same organization can entrust several mandates to you over the years.
3. The activities you carry out to fulfill the mandate granted.

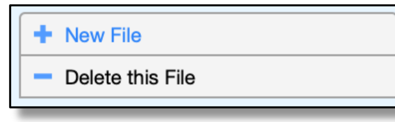
The creation of an institutional file will allow you to create links between the following sections:

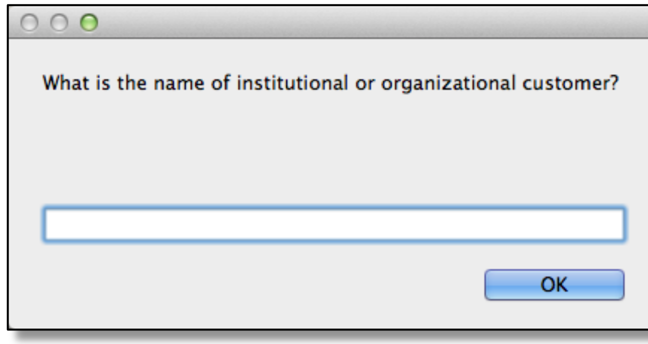
1. The description of the organizational client (Institutional Clients);
2. The description of the mandate of this task (Mandate);
3. Notes your actions or your work (Notes Activities);
4. The Clients Directory;
5. Invoicing activities;
6. Communications with representatives of the organization;
7. Global reports on the implementation of your mandate (Report).

We will describe in this chapter the first two sections. Others will be addressed in subsequent specific chapters.

5.7.1 File settings and client description

By clicking "New File", the procedure first displays a dialog box asking you to enter the name of the organization.





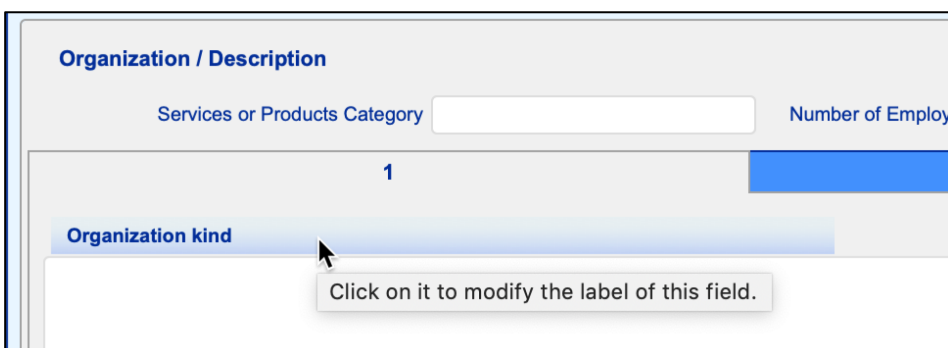
It then displays the items available in the « Coordinates» pane.

If you have made a mistake in typing the name of the organization and you want to change it, it is best that you do it immediately. To edit the name of the organization, click on the « M » button next to the name.

Among the important details to enter, there is the name of the representative, which should correspond to the identity of the person with whom you negotiate your terms or with whom you are likely to communicate more often. Because it is the name of the representative who will be automatically transferred to the « Professional name » when you note the communications with the organization in the « Message » section.

Therefore, if this is the same person as you enter in the « Directorship » field, it is best to also enter its name in the « Representative - Contact » field.

In the "Description" pane, there are 7 categories available to describe your institutional client. Five of these seven categories are editable titles, so as to adapt them to your practice. On the other hand, remember that when you change a field title, the change will be active in all records created in the future.

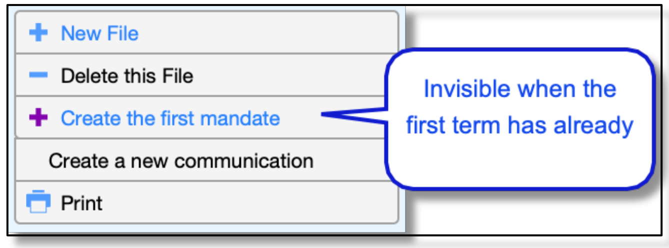


So you cannot customize the fields title according to the client.

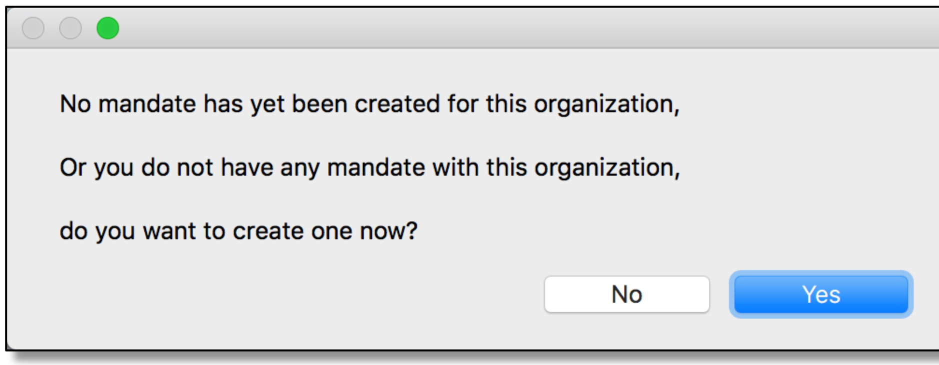
Also remember that to create a first note on organizational communication with a client you have to go in the « Institutional Clients » section and use the tool for this purpose.

5.7.2 The mandate

When you create a new file for an institutional client, an additional button is displayed to allow you to create the first mandate..

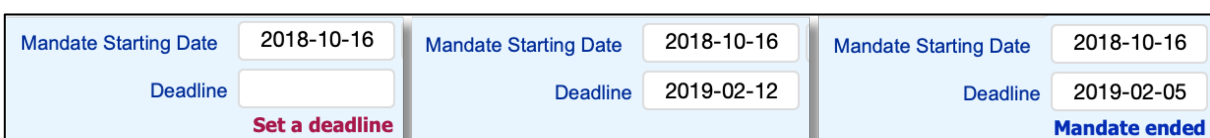


Once the institution's file is created, when you try to display the mandate section, a window appears asking you to create a mandate, if you have not yet created a mandate for this new client.



If you want to create new mandates for the same organization or for another client institution, in the Mandate section, the tool to add mandates displays the list of organizations with a file, and allows you to create a new mandate for the same organization or for another organizations on the list.

In the definition of the mandate, both dates must be entered: the start and the termination or expiration date. Regarding the due date, a reminder will appear if you leave it empty. "Mandate ended" is displayed when the current date is equal to or later than the due date.



By clicking on the "Start Date", the date is entered in the field.

Under the "Planning" tab, one section allows you to describe the response plan's mandate and objectives.

5.7.3 Adding an activity to your mandate

Obviously, before you create an activity, you must have a mandate.

As a result, when you try to view the "Activities" section from the Mandate section, and you have not yet defined a first activity for this mandate, a message informs you and asks if you want to create the first activity.

This is from the « Mandate » section that you can create the first activity. This passage by this section to add an activity is needed to create the links between activity, the mandate and the organization concerned.

If you are in the activity section, and want to add an activity, you must click the button to add an activity, which displays the list of organizations and mandates to choose for adding an activity. You click the mandate to which you want to add an activity; if the mandate does not exist, then go to the Mandate section to create a new mandate.

Thereafter, additional or subsequent activities can be added from the « Notes Activities » section.

This is why it is important to enter the title of the mandate before creating the activity, otherwise the title of the mandate will not be copied to the "Activity Notes" section.

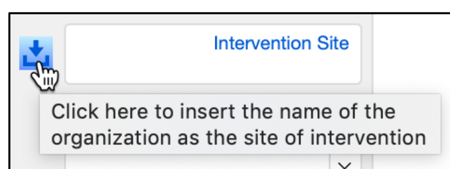
Note that the mandate may be "Ended" when the file of your institutional client is still active. The file of an institutional client acquires the status "Closed" only when you enter a closing date in the "Institutional Clients" section.

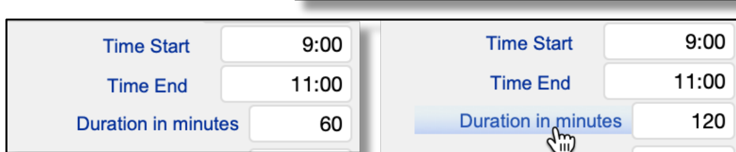
The "Intervention site" section contains a drop-down menu displaying the list of your places of practice defined in the Options section.

However, you can double-click in the field to add a site not present in this list.

You can also click on the juxtaposed button to insert in place of intervention the name of the institution or organization that has entrusted you with the mandate.

If you enter a start time and an end time for the activity, as soon as you finish entering the end time, the duration will be calculated automatically. If the duration is not the right one, or if a "? Is displayed, click on the title "Duration in minutes" to adjust the duration.





Note, however, that in the version of BaseDPsy with Calendar, if you leave the hours blank and you display the activity in the calendar, it will be at Midnight in the calendar.

5.8 File creation for group therapy

In the previous version, there was an interface for group therapy and an interface to support groups. In this version of BaseDPsy, improving the user registration of participants no longer requires two interfaces.

So there is only one interface for creating group, regardless of the nature of the group.

By creating a folder for group therapy, you create links between the following sections:

- Group therapy
- Group Meeting
- Clients Directory
- Meetings Invoicing
- An possible report on its outcomes

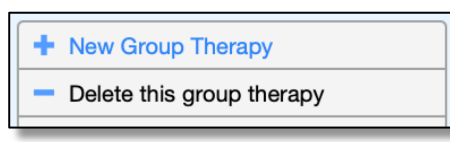
When you will enter participants in group therapy, if participants have a personal record of psychotherapy, you will also create links between the previous and the next two interfaces:

1. Data Client
2. Notes

5.8.1 Group functioning description

Creating a folder for group therapy involves two essential steps :

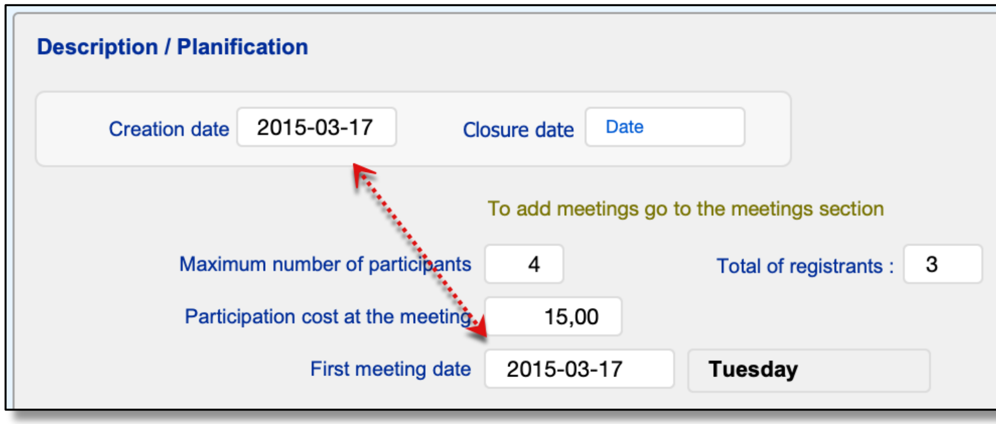
1. Description of the group operation
2. Registration of participants



When you create a new group with the tool on the interface, a dialog box asks you to define the group name.

You can if necessary modify the group name using the "M" juxtaposed tool. However we recommend that you do any modification before creating meetings and especially before billing meetings for the change is also reflected in the recorded financial transactions.

The file of group therapy is classified closed as soon as you will enter a date in the closure date field. To avoid confusion between the active folder and your planning dates of meetings of the group, we added two sections of dates, different for the folder and meetings..



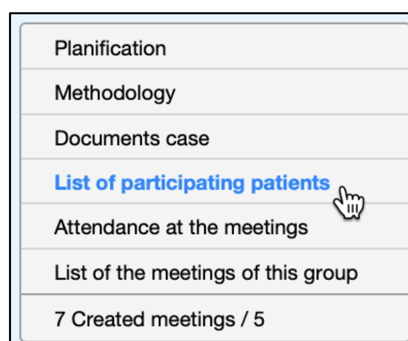
So you can set the date the file was created according to the date you start thinking about how it works, and as closing date, the date on which you will have more work to do in the folder of this group. Because the dates of the first and last scheduled meetings will be different dates for opening and closing the file.

Because you created the first meetings from the Group section, it is best to enter the data in all the fields available in the "Planning" tab before creating these meetings.

See below for instructions on creating meetings (5.6.6).

Under the "Methodology" tab, there are two available fields whose title is editable, one to set the objectives of the group therapy, one to specify the operation (Details on Running Condition).

Under the "Bound Files" tab you can insert documents and specify the intended use of documents or of other tools provided to participating members.



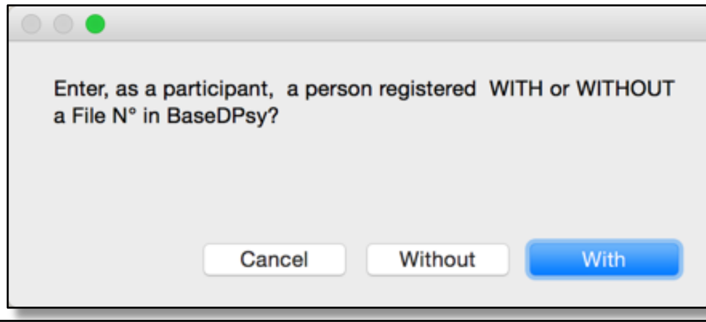
5.8.2 Registration of participants

So that you can indicate the presence in a meeting, you must first create a list of participants.

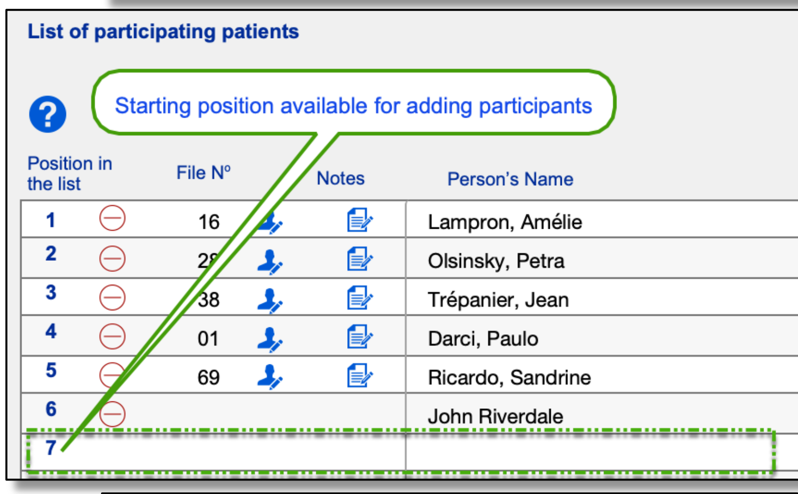
The list of participants is set out in the section "Group Therapy." You can resume several times to create a list of participants, meaning that you can register participants during the group running, what is possible given the position of the last participant of the list.

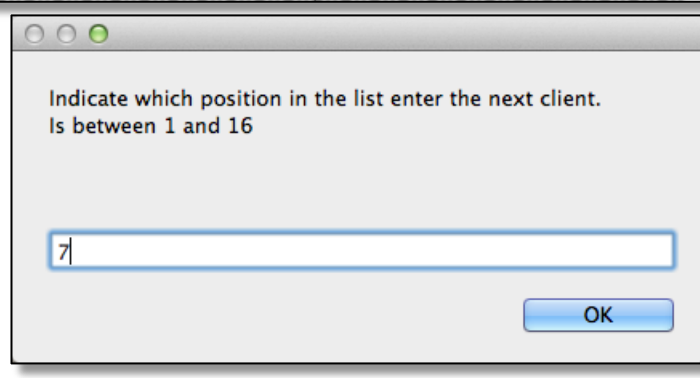
When you use the tool « Enter participants » a first dialog asks you if your client has a personal folder or not in BaseDPsy.

Then a second dialog box asks you at what position will be entered the next name.



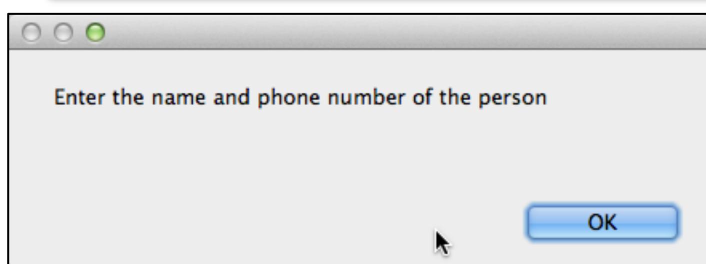
Then you enter the position number corresponding to the first empty row (unnamed participant) in the list table.



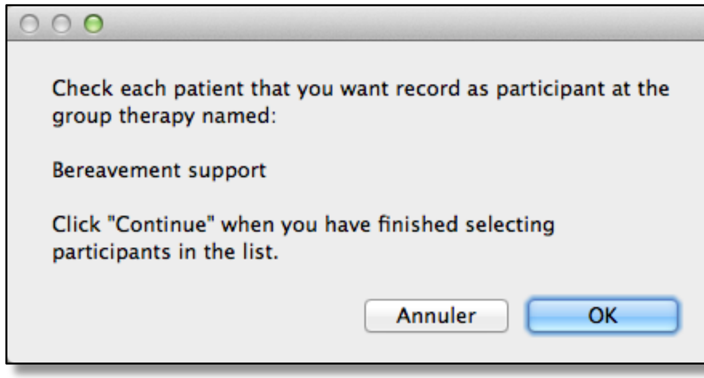


Then the procedure select the free entry in the row under the "Person's Name" column to the position you specified previously.

If you answered that you would like to register as participant a client who has no personal file in BaseDPsy, a message tells you to directly enter the name in the list and suggest you add the phone number.



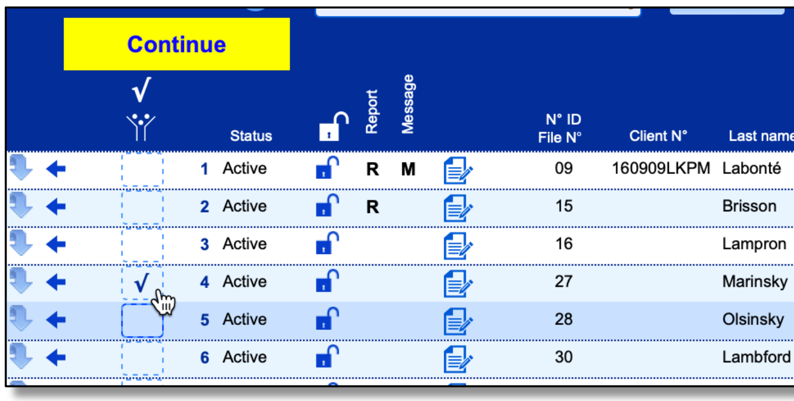
If you answered that you would like to register a client as a participant (the client already has a personal folder in BaseDPsy), a message tells you how to proceed in the list of clients that will be displayed at the next stage, while also providing the name of the group, to help you avoid mistakes.



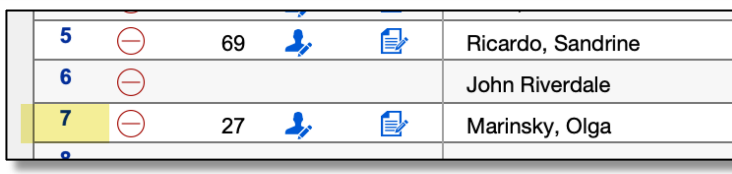
If you have made a mistake in the choice of the group, or if you want to postpone the registration of the participant, click "Cancel.".

By clicking "OK" procedure displays a list of registered customers in section psychotherapy clients, with a column which contain a "check" field, don't forget the button "Continue" at the top of the list.

You mark one or more clients and then you click continue.



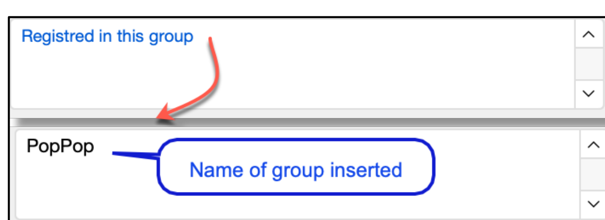
The client that you have checked in the client list will be automatically inserted into the group list at the position you have chosen before in the procedure, as well as his personal file N°.



If you wish to unsubscribe a member, simply click on the red button "Minus" on the same row as the participant's name.

However, note that each time you use this button to delete a participant, you also delete its participation in the statistical table under the tab "Attendance at the meetings".

Whenever you enroll in a group, a person with a folder in BaseDPsy, the group name is automatically inserted in the "Registred in this group" on the "Personal Infos" tab at the "Data Client" section.



If you enter the client in several group, the group name will be added under the group name already inserted in the same field.

But, if you erase his name as a participant in the group, the group name is not deleted in this field. If you want to remove this note, you must delete it manually.

The list of participants, after printing, will be present in the "Clients Directory" under the group name. Will be also displayed the site where is held the meetings, and phone number if you added, in the "Info" on the same row as the participant's name. Here is an excerpt as an example:

About adding the phone number, it is possible to add it in the Info section to all clients booked.

However, it is not necessary to write the list for participants with a personal folder in BaseDPsy as any client with a personal folder there will also be registered with the coordinates in the directory. His phone number prioritized (1st client choice to call him) is added automatically during the registration of participants. The phone number is registered only if you used the tool that prioritizes one of his phone number and identifies it by adding a yellow star next to the N°.

Since it is not necessary to find her phone number in the phone book in the identification of the group, you can change the phone number in the "Info" by any other information you consider relevant.

On the other hand, we recommend you not to write anything after the name in the field of the name participant, as this will make it difficult to use Ledger after billing participant.

However, in the "Info", you can write any other text than the phone number that could be helpful to identify (e.g. : in the case of homonymous) or to join the client.

5.8.3 Update the list of participants in the notes of meetings.

Whenever you create a meeting, the list of participants that you entered in the "Group" section is copied automatically from the list of participants in the "Group meetings." This list will be necessary in the meetings interface to indicate which participant was present and to charge participation to each participant, as appropriate.

As you can create a series of blank meetings (with progress notes to be defined later), it is possible that the composition of the group changes along the way. For example, if a new member is added from the third meeting, then you will have to update the list of participants which has already been inserted in the "Meetings Group". A button has been designed for this purpose.

5.8.4 Registration of participants in an « open » group

We say "open group" if you agree, in the functioning of the group that people can join the group en route, that is to say, not necessarily from the beginning of operations (not present at the first meetings).

In contrast, a "closed group" is a group whose composition does not change between the beginning and the end of the meetings, except by self withdrawal of participants.

In BaseDPsy, there is a maximum of 16 places in the table entries.

For a number less than 16

If you lead a group therapy format with open group whose the initial number of participants is less than 16, we suggest the following practices for the registration of participants:

> When a participant gives up, leave his name on the list of participating clients (Group section) and add the names of new participants at the end of the list, in blank spaces.

The reason is that it allows you to maintain a certain accuracy in the statistical table under the tab « Attendance at the meetings ».

For a number over 16

In the clinical tradition of the therapeutic groups, it is very rare to accept more than 12 people in a group. But by caution, we have provided a number till 16 places in the list.

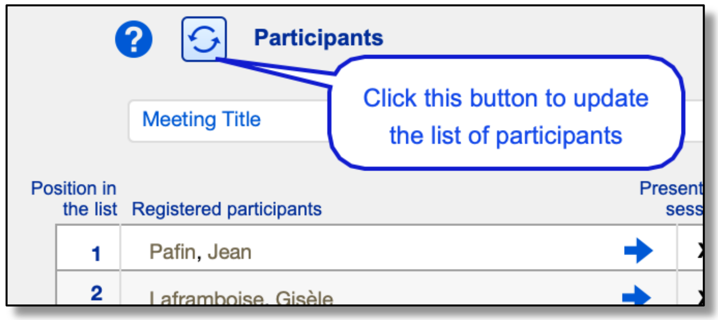
If you create a closed more than 16 people therapeutic group, you will be faced with this limit in BaseDPsy.

However, if you create an open group, in which some participants give up and are replaced by new ones, it would be technically possible to exceed this limit.

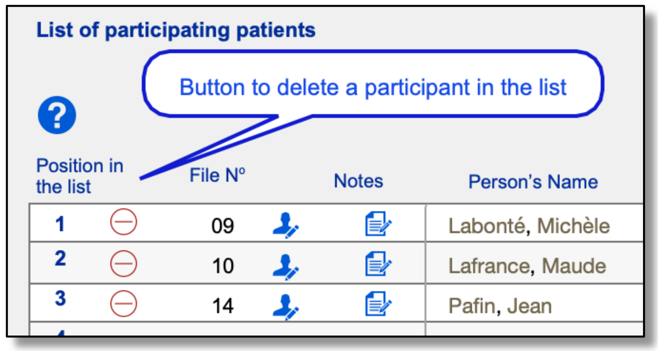
If the number of free spaces to register your participants come to be insufficient, then you have to replace the names of those who have abandoned or left the group by the name of the new arrivals. To do this replacement, two methods are available :

1. First method: You can delete the name of the person in the list of participants using the button for this purpose, which has the effect of also erasing the attendance of the participant in the statistical table.

   After deleting a name, you use the button "Enter participants" and enter one participant at a time, giving as "position" the number corresponding to the name cleared. In this example, it would be the position "1".

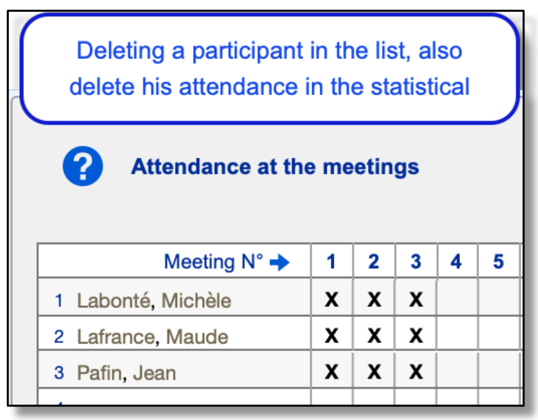


   But, you might not want to lose this number of presences in order to maintain the participation total for the total of available spaces in the group, in this case use the second method.



2. Second method: You enter the name of the new participant over the name of the former member.

   You use the button "Enter participants" without first erasing the former member, and entering one participant at a time name. You give as a "position" the number corresponding to the name of the former participant. His name and File N°, if any, will be replaced with the new person.



But in all cases of new listings to the group, regardless of the method used, you must update the list of participants at the summaries of progress notes (ie: the "Group meetings" section) when the "blank" summaries of the meetings were created before adding participants. Except of course for the meetings that took place prior to enrolment.

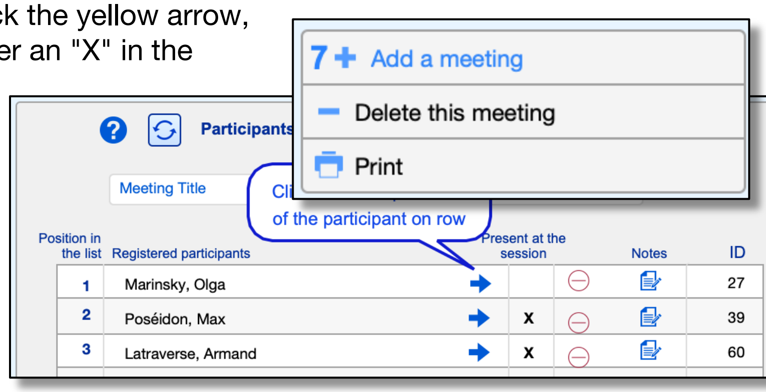
5.8.5 Enter the presence of a participant at the group meetings.

In the interface « Group Therapy», under the "Participants" tab, there are two tabs, one of them is called "Attendance at meetings." Table of attendance can not be changed at this point. Attendance is part of the "Group meetings" because presence may vary from one meeting to the next.

Remember that in "Group meetings" section, the only way to add names in this table is to write the name in the list of participants in the "Group therapy" section and use the button to update the table in the meetings interface, under the tab "Meeting Info" and under the "Participants" tab.

To register a presence, display the "Participants" tab in the "Group meetings".

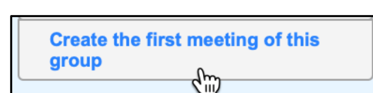
Then, under the "Participants" tab, click the yellow arrow, vis-à-vis the member present to register an "X" in the column of attendance.



5.8.6 Create a series of blank summaries scheduled group meetings

Usually, a group therapy is running with several meetings. In "Group Therapy" you have two tools to help you create these meetings. By "Meetings Notes" we mean have an interface where you can write progress notes on the group.

But before using these buttons, you need to have, if possible, entered the information of all the fields under the "Planning" tab.



It is also preferable to have entered all your participants, if possible.

If you want to create meetings one to one, you must first use the "Create the first meeting of this group" button located in the "Group Therapy" section.

Hold the button disappears once you have created the first meeting of the group displayed.

Once the first meeting created, go in the section "Group meetings" , and use the « Add a meeting » tool.

However, if your meetings are weekly, and no more than one by week, you can create ahead of all meetings you have planned for this group. Later you will have only to write progress notes of each meeting.

You must first define the number of meetings scheduled for this group before using the tool. Moreover, the number of meetings scheduled is displayed on the tool. The number on the button is adjusted to the number of remaining meetings to create.

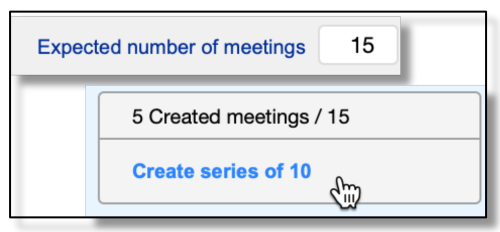
Other conditions to use this tool: the expected number of meetings must be greater than one (1) and the frequency must be fixed at « Once a week ».

This button disappears when the expected number of meetings has been reached or if the chosen frequency is different from "once a week".

This button does not exist in the version with the agenda, as the procedure to create a series of meeting is in the calendar.

In the version of BaseDPsy without agenda, it is possible to transfer meeting dates in the calendar "Apple", if you work on a computer with the platform "MacOS".

If your platform is "Windows" or iPad, you will not see the tools to transfer the appointment dates in the calendar "Apple".



5.8.7 Create a series of appointments for group therapy in calendar.

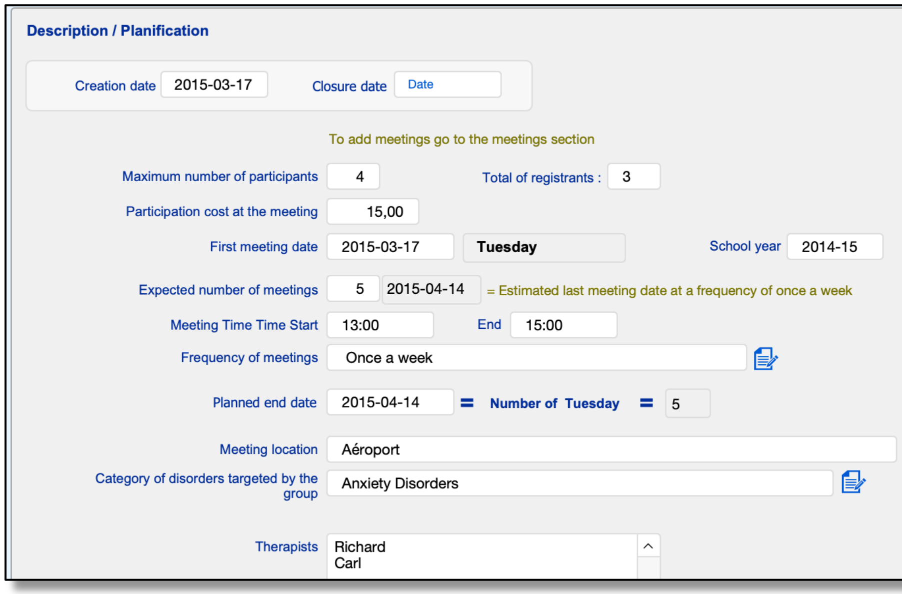
Usually, group therapy takes place over several meetings. By "meeting" we mean here an interface where you can write the evolution of the group notes or a summary of the meeting.

It is possible to create a series of appointments and a series of blank summaries corresponding to progress notes of your group.

First step: enter information about the planned activity

But before creating the appointment, you must have, if possible, entered the information of all the fields under the "Planification" tab, in "Group Therapy."

Here is an example.



It is advisable to enter the data before creating appointments because several information will be repeated (pasted) to each appointment and each meeting summary of the same group.

For the same reason, it is preferable to have all registered participants, if possible, before creating the series of appointments.

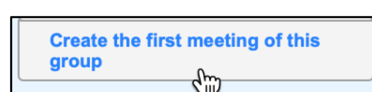
Second step: creating the meetings

You can choose to create the first meeting or automatically create all scheduled meetings.

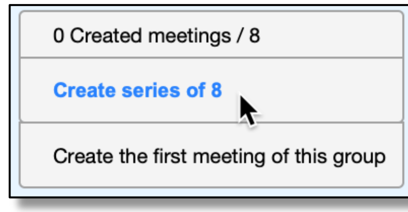
Each time you create a group meeting, an equivalent appointment is created in the agenda. To view the agenda, click on the calendar icon in the header.

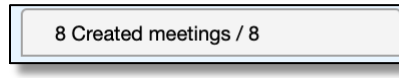
You also have a tool that allows you to create all the scheduled meetings or the remaining meetings out of the scheduled number.

If you do not want to create all the scheduled meetings in advance, you must create at least the first meeting, you can then create the following meetings one by one from the group meeting section.

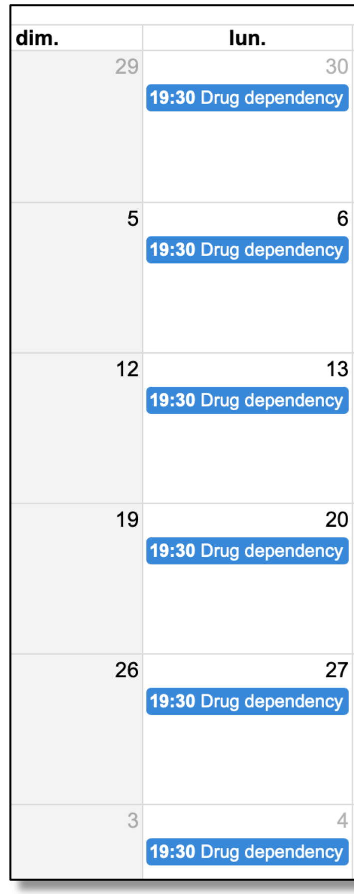


If you want to create all the scheduled meetings and add them to the calendar, use the tool "Create series of..."
This tool is only visible when the number of created meetings is less than the number of scheduled meetings.





On the right, an overview of the meetings created in the agenda at the same time as the group meetings.



Writing follow-up notes

6. Notes creation and adding notes

When you create a folder, a first session with an empty summary (not written note) is created automatically. The date assigned to note is that of the creation of the file, so the current one.

However, the date and all information on the session can be modified.

Subsequently, the creation of a note to the same folder is always an "addition".

Automatic display of the latest session.

Normally, if there are no errors in your database when you ask to view the "Notes" section from another section displaying the name of a client in psychotherapy, its last note will be automatically brought to the foreground.

So you're immediately ready to read the content or write a summary of a new therapy session with your client.

If you just create a new folder or a new approach to your customer, the summary is empty because the session was created at the same time as the new folder or the new clinical step.

Automatic display of specialized interface

There are three specialized interfaces for entering notes. One named "Notes" is for clients in individual or marital therapy, a second called "Family Therapy" is for clients in family therapy and the last is for clients in art therapy.

When creating the file, the selection is automatically done on "individual"; but you can change it.

The existence of a choice when creating the folder allows you to be always directed to the interface of your choice when navigating BaseDPsy.

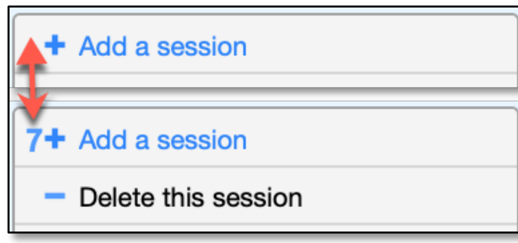
The three interfaces are very similar and they share all the content of your resume sitting and its parameters. But the family therapy interface has a tab that allows you to specify who were the participants at the meeting and allows to define their kind of belonging (brother, uncle, etc.).

The one for art therapy has 10 additional briefcases to insert a work picture the client and a space to write comments on each client's work.

However, once the note made no matter in which of these interfaces you are, you can read the summary that you have written because the same content is present in all three interfaces.

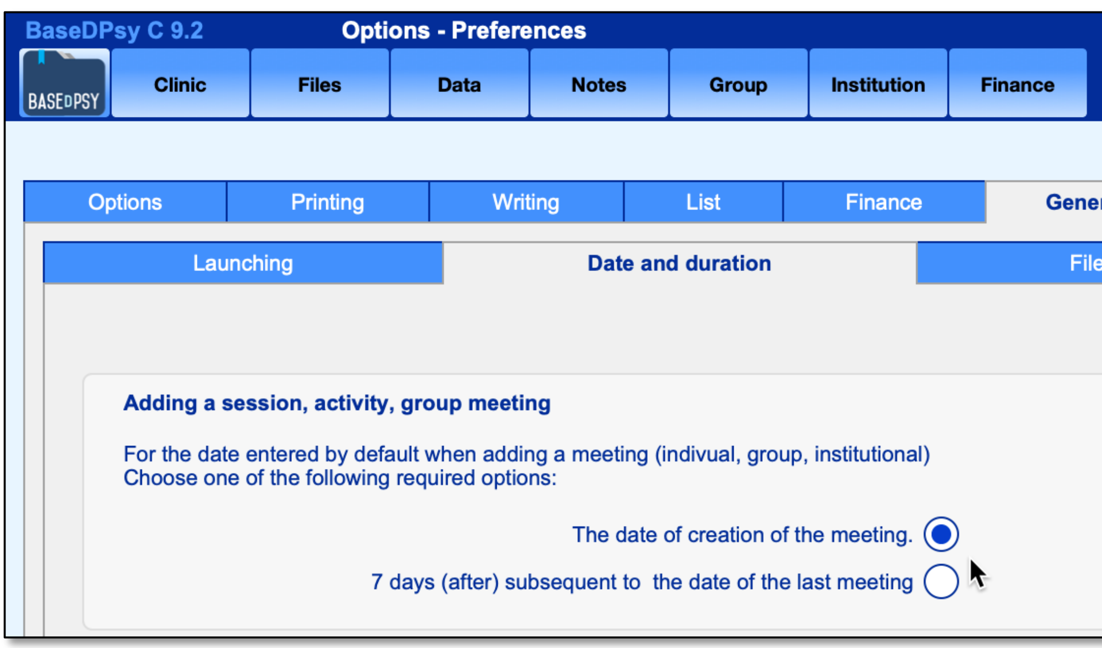
6.1 Adding a session in BaseDPsy

The appearance of the tool to add a session varies depending on an option in the Options section.



The option is available in the "Options" section under the "General" and "Date and Duration" tabs.
If you chose the option "7 days after ..." a "7" is added to the tool.

When the 7 is present, so if you have chosen the choice "7 days later", the date added automatically when adding a session will be 7 days after the date of the most recent session.
You can then change the date and other details of the session. However, if you copied these details in the Apple calendar, the changes are not transferred automatically, you must do it manually.



6.2 Adding a session in BaseDPsy

The procedure for adding session automatically integrates the addition of an appointment on the agenda.

To view the appointment, click on the calendar icon in the header.

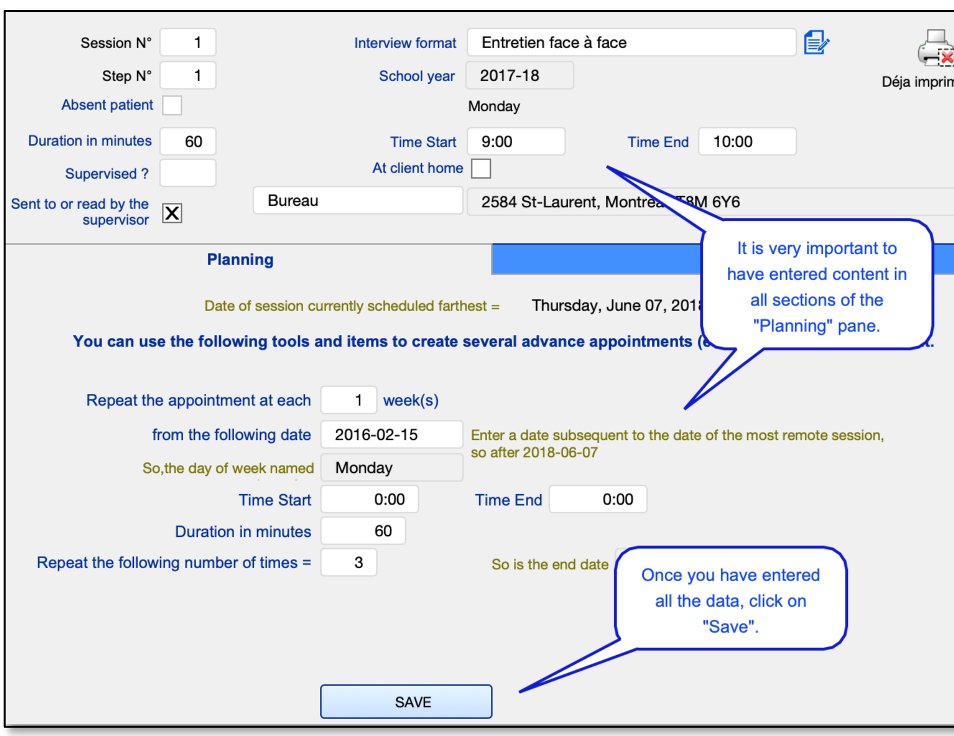
To choose if you want that the date of the added session is the current date or a date postponed of seven days, go to the Options section, to tabs « Writing » and « Add a session ».

Important note: The appointment will not be visible in the regular work schedule if you have not entered the start and end time of the session. To see the Appointment under these conditions, you must post the schedule from midnight.

6.3 Planning ahead a serie of sessions with the same client.

It is likely that you will agree with many of your clients regular and periodic meetings: on the same day of the week and always at the same time.

To create in advance a series of empty sessions, view the "Planning" pane. You will find a set of fields and a "Save" button that will allow you to do.



Clicking in the field of the Start Time or of the End Time, the format displayed by default is "hh: mm: ss", but you do not need to write the time in this format.

For example, type only "9" and the format will show itself in "9:00". You type "13", it becomes "1:00 p.m." or « 13 :00 ». The time format is according the preferences of time format in you operation system.

However, if you want to enter 9:30, you need to type "**9**", "**:**", "**30**".

After entering all necessary information, click the "Save" button. If you miss an information, such as the Start Time, this lack will be replicated in all sessions created.

The time in minutes is independent of the hours agreed to allow you the choice to write the actual duration of the interview, or the equivalent of one hour of work claimed from a debtor.

With some external debtors, you can agree to have for example 6 sessions reimbursed. But the calculation of the duration of a session invoiced to an external debtor is from this field. Hence, if your sessions are always 45 minutes to calculate a full session to the debtor, you must still register 60 minutes in this field (Duration in minutes).

If a client asks you to change the time or date of an appointment set with this method, then you will have to find the empty session and individually change the date or time of each session created in advance.

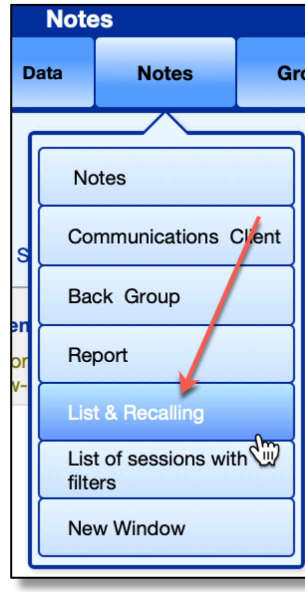
To display the session to change:
Display the customer involved in the "Notes" section, click the "History" tab, then click on the date of the session to be modified.

In order to avoid unwanted duplication of appointments, the "Save" button is invisible and inactive until you have entered the data limiting the repetition.

When you have entered all the necessary information, click on the "Save" button. If you forget any information, for example the start time, this omission will be repeated in all the sessions created.

6.4 View the list of scheduled sessions in the same day, sorted by the Start Time

You can in BaseDPsy even the one without calendar, see the list of interviews scheduled for a day's work.



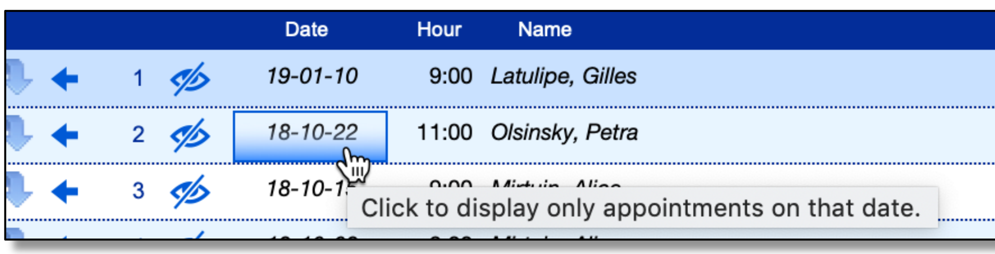
You will have the equivalent of a agenda.
To plan your work day, see the previous chapter.
However, you should create in advance your notes of meetings indicating the scheduled time of the session.

Go to the list "List & Recalling".

Two ways to display only the appointment on the same day:

1. Either you use the header button: Edit the displayed date;

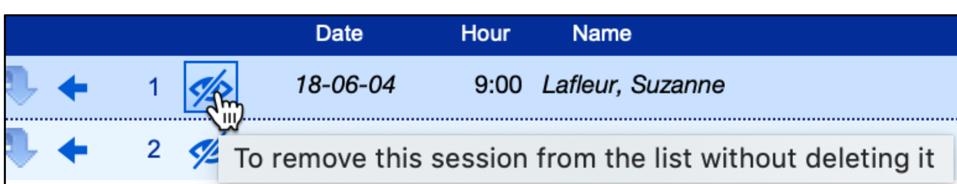
2. Either you display all dates and click on the one you want.



Then click on the column header "Hour" to order your schedule of the day.
Your scheduled sessions for the day is displayed and you can print the list.

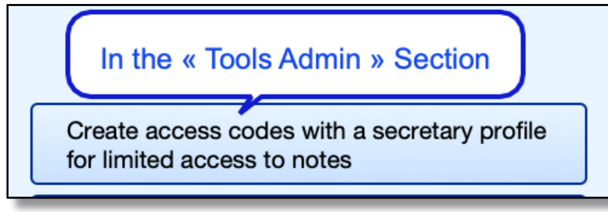
This interface also allows you to send an email to the clients from the list, as a reminder of the upcoming session; see section 7.3 for this purpose.

In this list, there is also a tool that allows you to remove (hide) a session from the list without needing to start the list again and without deletion effect on the session itself.



In the "Dashboard", you also have a list of appointments for the day of the current date. Just click on the name to display the session.

6.5 Secretary Access Privileges



When you create a personal account for another person (secretary, accounting assistant, etc.), if it opens BaseDPsy with its custom codes, it can no longer read the following contents: The application, the service agreement, Anamnesis, follow-up notes, personal notes and theoretical reflections, reports, messages.
Nor can she attempt to modify the content, which becomes a prerogative of the professional.

She then receives a notice saying "Access denied" or that hers access privileges do not allow it to do this procedure.

On the other hand, she can still create or delete folders and new sessions in order to be able to invoice the client, but without having access to the contents of the note.
She can also create messages and reports (empty).

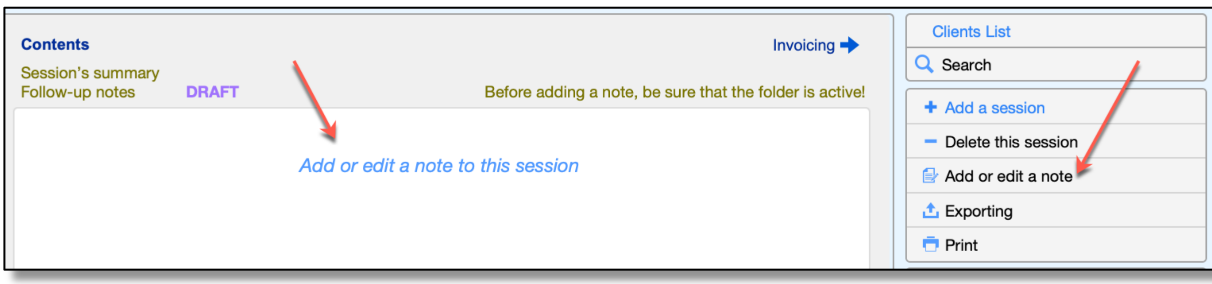
6.6 Writing notes in individual psychotherapy, marital and family therapy

The first time you view the "Notes" section after creating the file, the session is created, it is also identified as "Draft". There only remains that you to add content.

To add content, two tools are available :

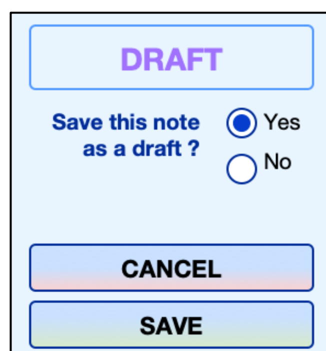
1. Click the white space (which changes color when overflying, and the cursor changes to a hand, indicating the presence of a hidden tool);
2. Use the tool « Add or de ».

Both tools are launching the same procedure.



Flying over any tools, you will find also a tooltip warns you that the file must be active, otherwise you can not add or edit notes. To be active, the file or the clinical step must have a registration date but must not have a closure date entered (Files Request section).

The procedure displays a new window for writing.



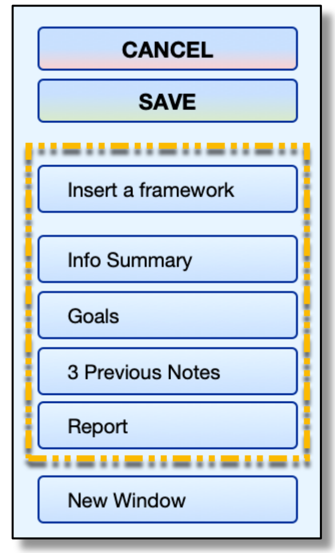
In this new window, you can insert text into white space and you can change the the text with the formatting tools on toolbar of the header.

It is important not to use only the « Save » or « Cancel » buttons displayed in the interface (and not those toolbars iPad or those at the header) so you can avoid mistakes.

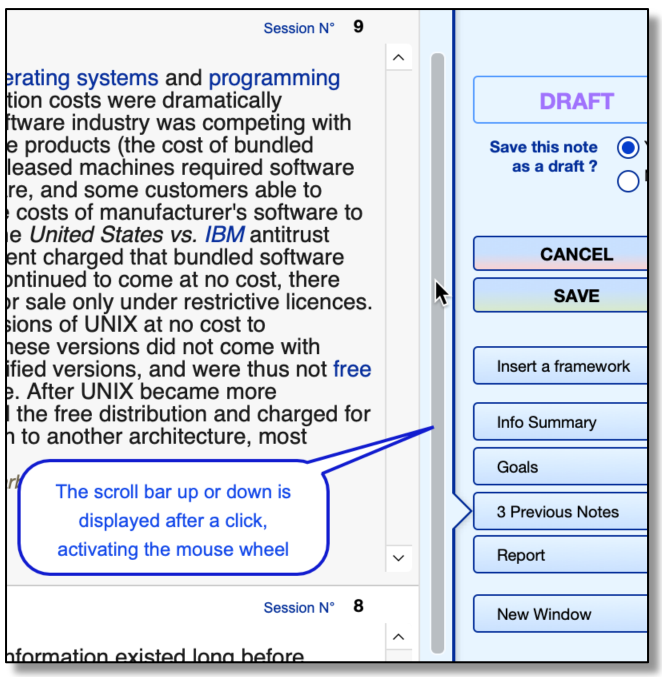
By default, Filemaker header is hidden, if you ever show in this window, do not use the buttons in the header Filemaker as their use will interrupt the procedure of registration of the note and cause to you potential problems.

6.6.1 Writing Support

When it comes time to write a follow-up note, we sometimes want to remember what we have written about the last sessions or in a report or to re-read the information about the client. To this end, we have added three buttons in the editing interface that allow you to read the agreed goals, the summary of the last three sessions or a report, without having to change the interface.



To display the 3 notes you will need to scroll either the contents of a note or the window to display the three pages. To scroll the content, click in the field. To go down to the third page, click in the window and use the mouse or the up and down arrows on the keyboard (this way may vary from computer to computer).



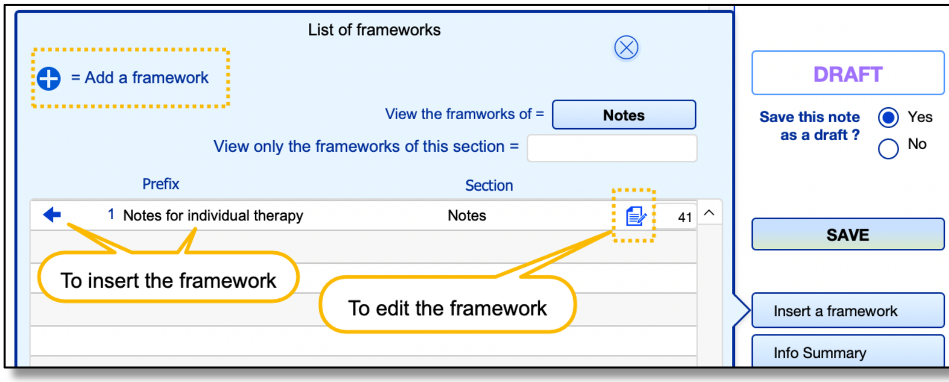
Inserting a framework in Notes

Before writing your notes, you can insert chapter titles or themes writing, short, a framework (basic structure).

With the purchase of BaseDPsy, default content of framework are present. However you can customize the framework.

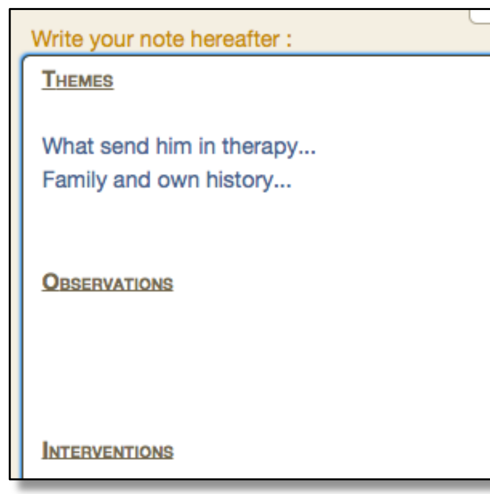
These options allow you to always have a choice suitable for treatment formula used (individual therapy, family therapy, art therapy, etc..) Or for the type of client (adult, child, family, etc.). , or for your approach (psychodynamic, cognitive-behavioral, psychosocial, etc.).

The frameworks can be created or edit either in the « Options » section under « Writing » tab. It is best to fit them to your practice before writing notes.



The insertion copy in the area of drafting the list of topics that are displayed by leaving a space between each writing.

The space expands automatically in accordance with the length of each writing between themes.



You can also change themes once inserted. You can also change the color and style.

While you are in the draft stage, you can also delete all the content and replace it with another.

You can also copy-paste. For example, if you want to import a draft text already made in a Word document, you can do it with the copy and paste functions.

The frameworks can also be used to insert pre-written text.

Insert a pre-written text (predefined content)

Some approaches use techniques that are similar from one client to another. BaseDPsy offers you the opportunity to save time in writing by inserting in your interview summaries, portions of text that are similar from one client to another.
This tool gives you the equivalent of a U.S. software which design the progress notes by inserting phrases already written.

Example :you can compose phrases that describe the mood of a patient, or type of reaction.
Another example : instead of rewriting each customer the summary of your explanation of the

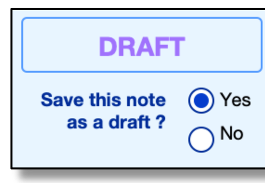
relaxation technique that you recommended them, you can write it once as a "typical activities", giving it a title of a framework, and insert in each summary session by one "click".

You can also insert a questionnaire into the frameworks. Remember that you can copy and paste from word to define the contents of a pattern

6.6.2 Draft or not, and automatic signature of the follow-up notes

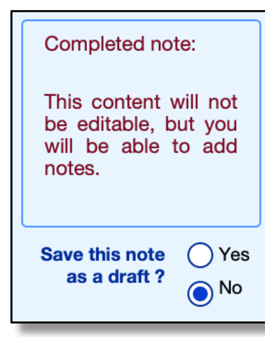
Whenever you save your summary of the meeting, a small text containing your name, initial of your occupation, date and time will be added.

6.6.3 Choose the status: Draft or Note completed



When saving your writing, then you must decide if you keep the status "Draft" to your interview summary or the status of completed note..

The difference between the draft status or the completed status the following:



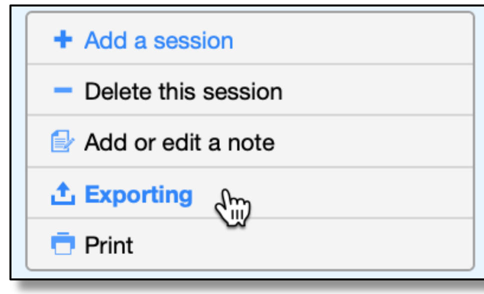
If you do not keep the draft status to the summary of your session, you cannot correct or modify the text already written, but you can still add text. By keeping the text as a draft, you can change it later. If you choose "No", you only can add text under the former wording.

However, each adding text will be followed by the equivalent of a signature, small print, including your name, initial of your profession, the date and time of writing followed by a dotted line. This has the effect to date any added text or any modification, as recommended by professional standards.

If you keep the draft status of the summary of the session, you can not only change the content, but you can also delete the signature and the date of the previous note.

6.6.4 Exporting the content of a session

If you choose to export the contents of a text session, it is good to remember the following when opening the exported file.



On MacOS, preferably open the text file with Text Edit or with Pages;

If you open with Microsoft Word (Office), you will need a file converter, then use "Unicode text" and "Unicode Little-Endian 6.3"

If you open with OpenOffice, use the text converter "Unicode" and the paragraph skipping "CR"

With Windows, preferably open with WordPad and paste in Microsoft Word if necessary

If you open with Microsoft Word (Office), you will need a file converter, then use "Unicode Text"

If you open with OpenOffice, use the text converter "Unicode" and the paragraph skipping "CR"

6.6.5 Pasting a text in the session content

You can use the copy and paste feature to import the text of another word processing, into the content of the session. This is useful if you used to make your notes on Word.

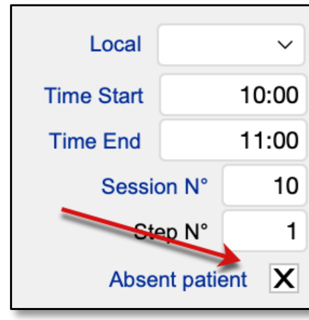
But it is possible that you encounter some limitations in your print options: it may be that the choice of characters (font) does not work, that is to say that the font will remain in the same format the original and will not be reduced to 9pt or 11pt according your choice in BaseDPsy print options.

This limit is more problable when exporting a text file.

6.7 Session Information

6.7.1 Missing Client

It is now possible to quickly identify the number of sessions that the client is absent.
A check box allows you to identify that the customer was absent, independently of billing.

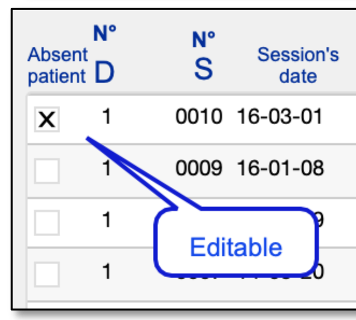


Just click in to box with an "X" the absence of the client.

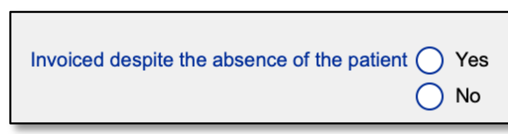
The total absences from the same client at its sessions is posted in the "Sessions List" pane.

It is an absolute total: it counts the number of "X". The calculation is independent of the duration of the session.

To allow you to quickly calculate absences previous sessions this new feature, we added an editable field in the history list. So you can check all the sessions where the client has been absent without needing to go through each « Sessions info » of the previous sessions.



Total absences were also added to the two statistical tables: the number of sessions per year and the number of sessions per client.



Note that this hook on the customer's absence does not affect the other hook in the billing section. If you want show on the bill and in the Ledger, the fact that the session was "invoiced despite the absence of the patient", you must also tick the option under the Invoicing tab.

6.7.2 Session Duration:

It is now possible to set a default session duration.

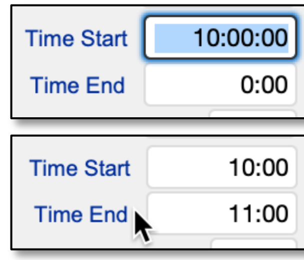
In the "Options" section, you have under the "General / Date and Duration" tab an option to save a default duration.

In the "Notes" section, if you have checked yes to the addition of a default duration, the duration will automatically be entered in the "Duration" field.

Once the time is entered, manually or automatically, when you enter the start time of the session, the time of the end of the session will be added automatically taking into account the duration entered.

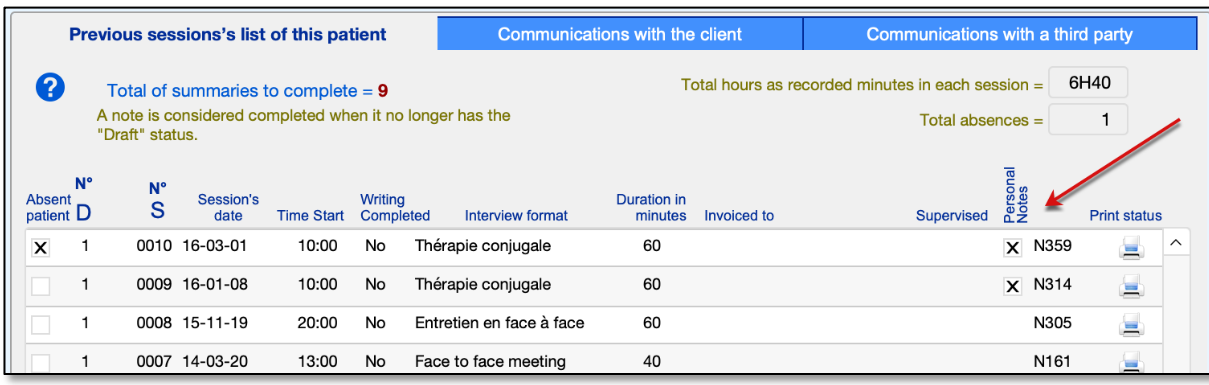
You add the duration and start time

As soon as you click next to the start time, the end time is self-entering.



6.7.3 Sessions List (History)

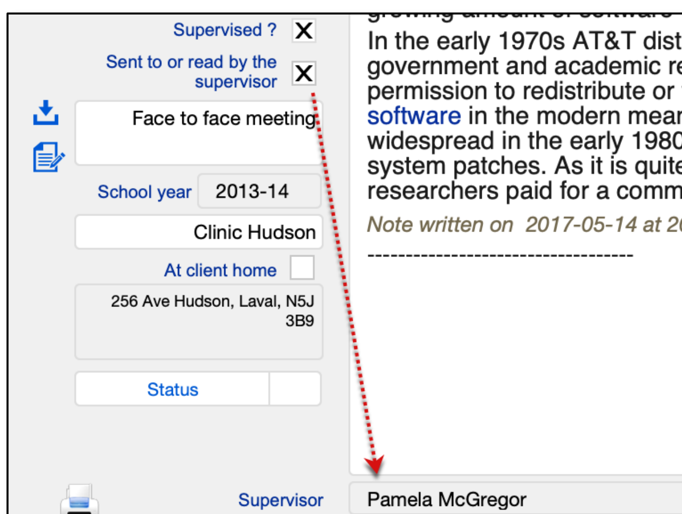
On the "Sessions List" tab, we added a tab and a list of communications with a third party. This is especially useful to those who have clients who are academic grade, or who are receiving services from other professionals.
In the history, there is an indicator of recorded personal notes.



6.7.4 Supervisor;

It is possible to indicate under the tab "Session Info" that a supervised session was read or sent to the supervisor, or that the session was supervised by the supervisor.

The name of the supervisor must be entered in the "Options" section to appear in the "Notes" section.
If this "Read by the supervisor" field is checked, the supervisor's name is added to the summary of the note, and the supervisor can add his signature to the printed note.

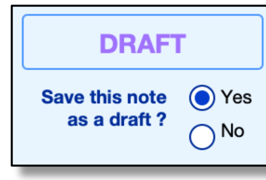


When the rubric "read by supervisor" is checked, the name of the supervisor is added to the bottom of the invoice as well.

6.7.5 Remembering if you have completed writing the follow-up note

First, we must remember that writing a follow-up note is called "completed" when at the time of saving the note, you choose not to keep it as "Draft". However, all new sessions are created with the draft status. Therefore, if you have not yet saved a summary of the session, it will automatically be listed as not completed.

If you are one of the therapists who have not taken the habit of writing progress notes immediately after the session, you may happen to ask yourself « What session summary is not yet completed? ».



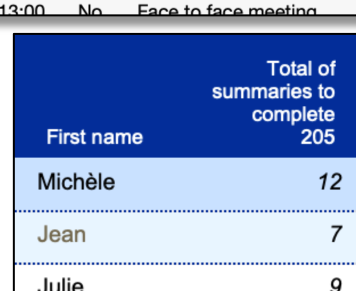
In this version of BaseDPsy, we introduced two markers that allow you to find what session summary is not completed and lacks of any client session summaries.
To remember if the summary of a session has been completed or not, several markers exist.

First in the interface of the follow-up notes under the "Sessions List" tab you will find a list that contains marker which notice if the writing is completed or not.

Under the same tab, mention is made of the number of uncompleted writings when it is greater than zero.

You can also display all notes not completed the same day by displaying the "List of meetings by date" interface, choosing the date of your choice and sorting the column markers rating not completed. By clicking on the title of "Writing completed" column, all the answers "No" will be placed at the top of the list.

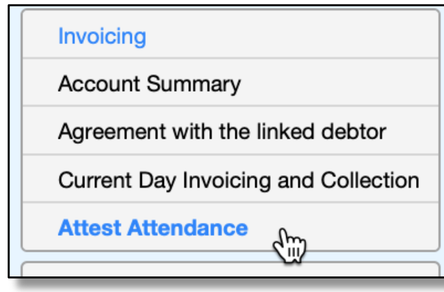
Finally, you will have an overview of the total drafting to complete, displaying the "Psychotherapy Patients's List" where the total writing to complete for each client is displayed.

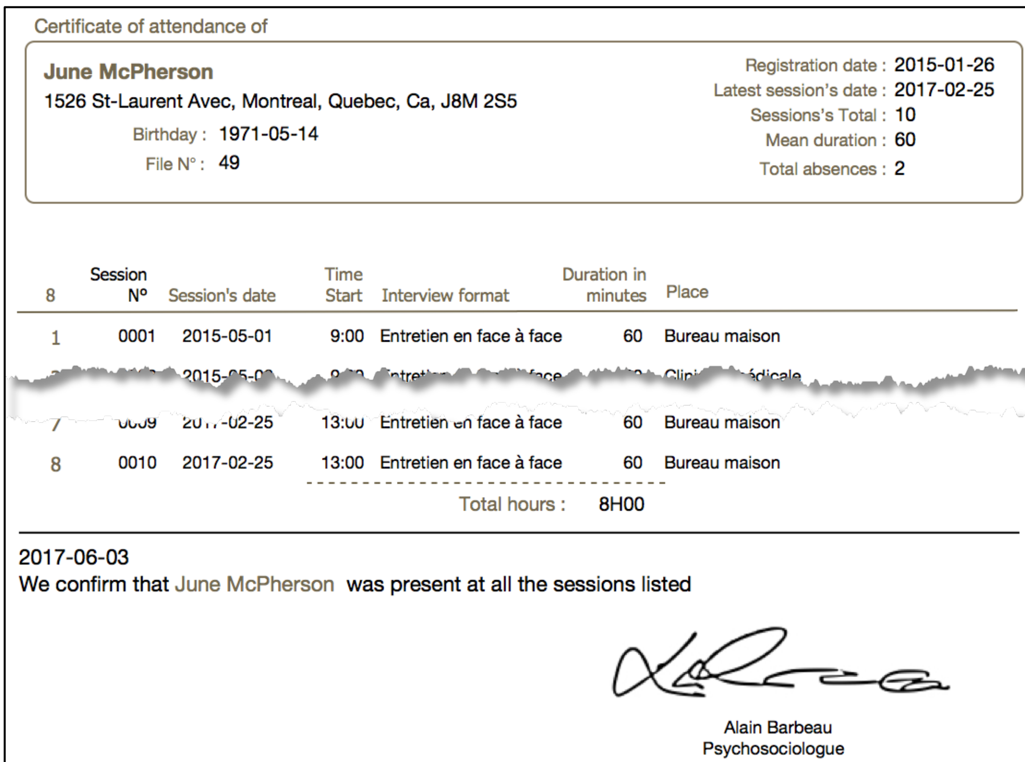


6.7.6 Attendance Certificate

Addition of a procedure of attestation of attendances to meetings with choice of dates.

The procedure allows you to choose between attesting to all sessions or sessions between dates. The certificate displays under the heading a summary table followed by a list of sessions and a signed confirmation of attendance at the meetings of the list.





Certificate of attendance of

June McPherson
1526 St-Laurent Avec, Montreal, Quebec, Ca, J8M 2S5
Birthday : 1971-05-14
File N° : 49

Registration date : 2015-01-26
Latest session's date : 2017-02-25
Sessions's Total : 10
Mean duration : 60
Total absences : 2

8	Session N°	Session's date	Time Start	Interview format	Duration in minutes	Place
1	0001	2015-05-01	9:00	Entretien en face à face	60	Bureau maison
7	0009	2017-02-25	13:00	Entretien en face à face	60	Bureau maison
8	0010	2017-02-25	13:00	Entretien en face à face	60	Bureau maison

Total hours : 8H00

2017-06-03
We confirm that June McPherson was present at all the sessions listed

Alain Barbeau
Psychosociologue

6.8 Notes on the activities and interventions mandated (Institutional Clients)

As writing standards on the description of an activity are different standards for the writing of a psychotherapy intervention, writing a summary of a activity within a mandate negotiated with an institutional client is much simpler.

First you have immediate access to space writing and you can change the content at any time.

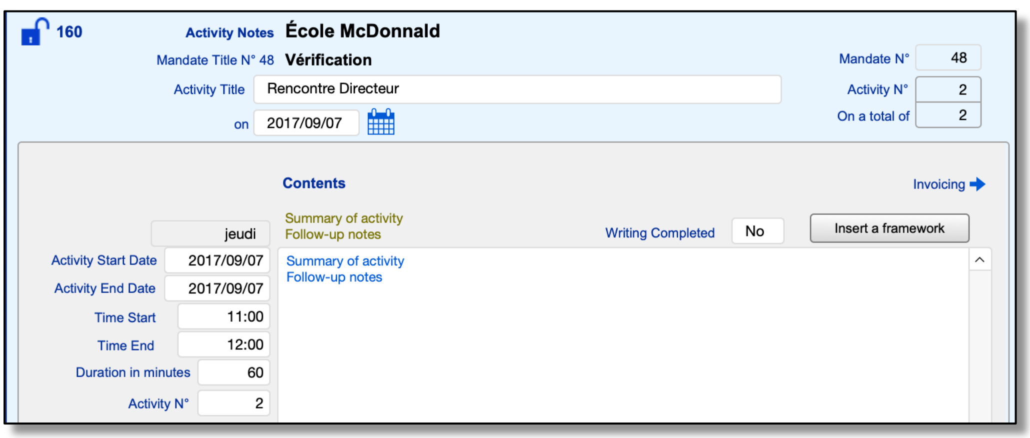
The signature is not inserted automatically, it is up to you to add.

And you choose to enter "yes" or "no" to indicate if the writing is completed.
This indication is included in the history and serves as a memory aid.

You can also insert a framework, such as writing a summary of a psychotherapeutic interview.

There is a field that allows you to note who were the members of the intervention team, if you were not the only professional.

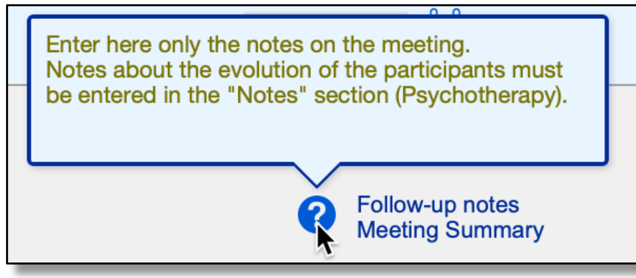
If, in the "Mandate" section, you change the title of mandate, just click, in the "Notes Activities" section, on "Mandate Title" to update it.



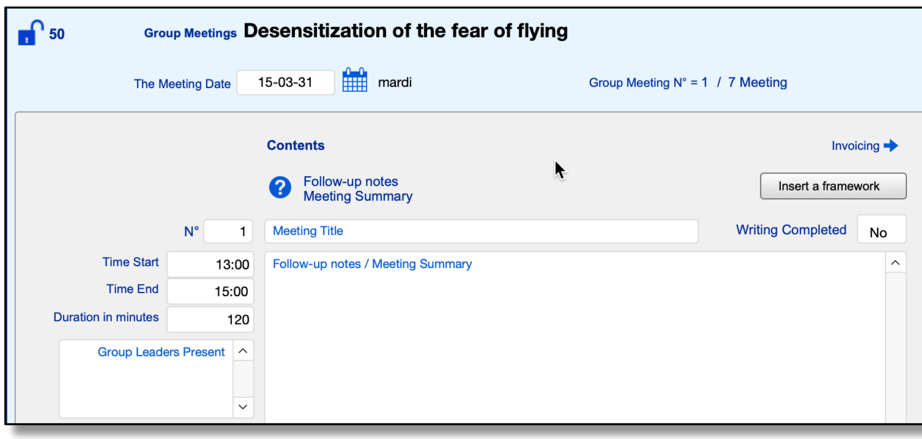
6.9 Notes on group meetings (Group Therapy)

The interface for writing notes on meetings closely resembles that on the notes on activities for institutional clients. Here also there is the possibility of inserting frameworks and of indicating whether the writing is completed or not.

However, a reminder at the head of the field you emphasize that the description of the evolution of the group as a whole is usually made separately from the description of the evolution of individual participants.

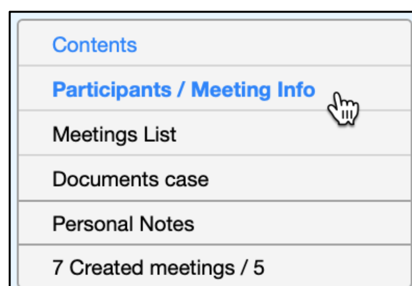


Obviously, you do not have to take this into account. But, BaseDPsy has still been programmed according to this practice.



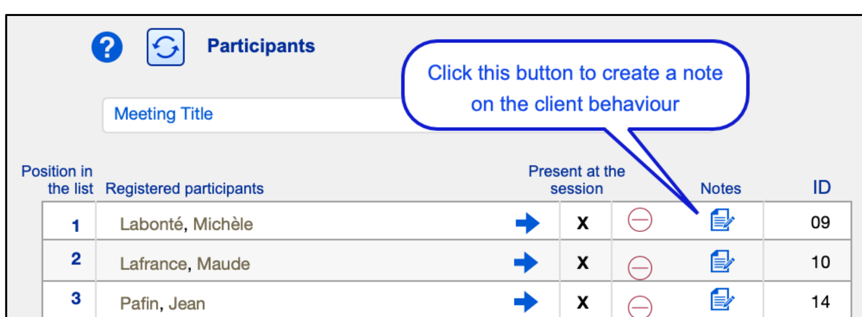
Consequently, to write notes on each of the participants, it is desirable to register each participant in BaseDPsy, that is to say of him create a personal folder, otherwise you will not have specific space to write notes on the evolution of each participant.

For participants who do not have a personal folder in BaseDPsy, you have the choice between not describing their personal evolution, or insert the description in the same space where you describe the evolution of the group.

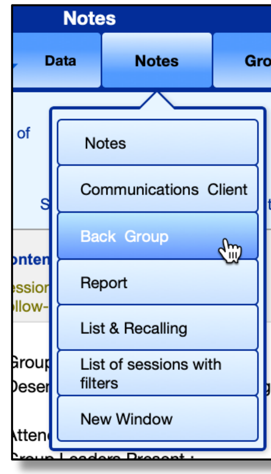


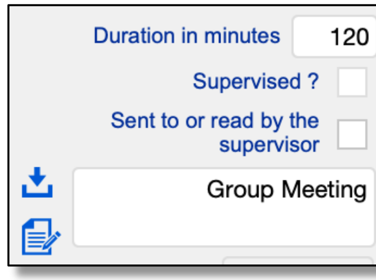
To write a personal progress note in the "Notes" section of the participant who has a personal folder BaseDPsy, go to the « Meeting Info / Participants »pane, and click the appropriate button to display the Notes section.

If you have already written a note on the client, then you must add a session for noting his progress in group therapy. Otherwise, you use the empty session



that was created along with the creation of the file and you write a note on its participation in group therapy. Check that "Group Meeting" has been added to the interview format.



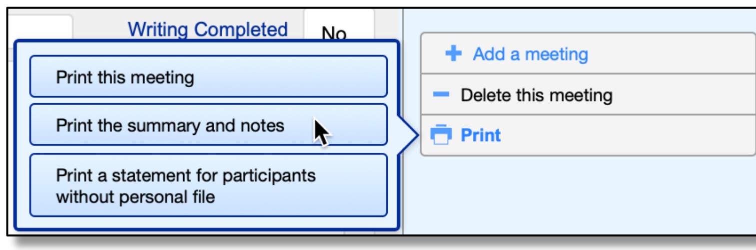


A button is available in the "Notes" section to return to the interface group meetings.

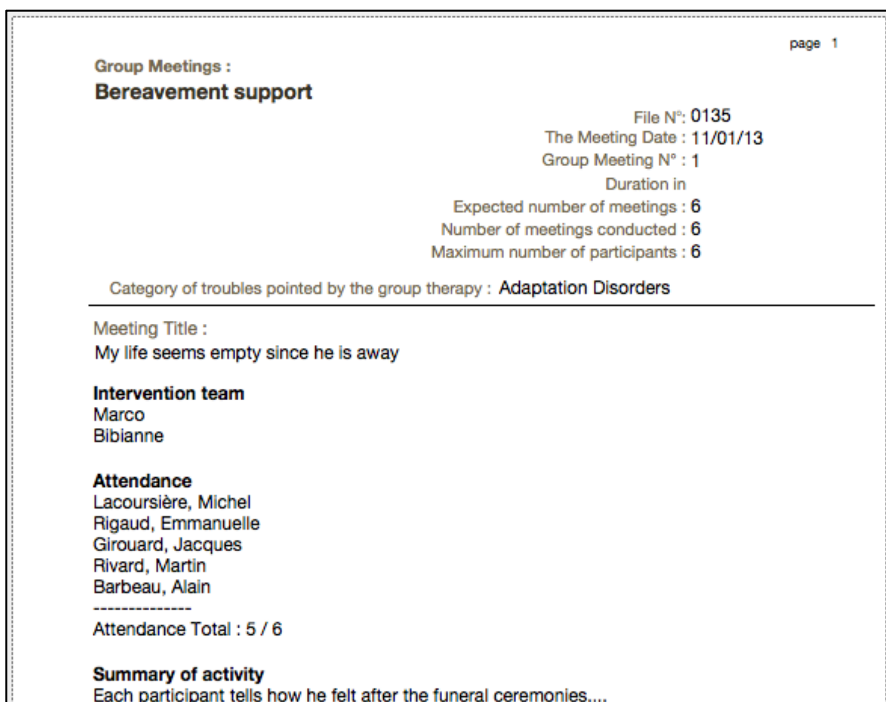
However, this return to the good meeting is effective only if you used the previous button in the table that include attendance at the meeting.

You will not have the same effect of accuracy for a return if you have displayed the "Notes" section with one of the other available buttons.

When you use the tools to launch printing all the details and parameters of the meeting under the tab "Meeting info" shall be inserted in the printed text, except for personal notes off file, which can also be printed, but using the button that specifies.



Here is an example of a print page of a group meeting.



page 1

Group Meetings :
Bereavement support

File N°: 0135
The Meeting Date : 11/01/13
Group Meeting N° : 1
Duration in
Expected number of meetings : 6
Number of meetings conducted : 6
Maximum number of participants : 6

Category of troubles pointed by the group therapy : Adaptation Disorders

Meeting Title :
My life seems empty since he is away

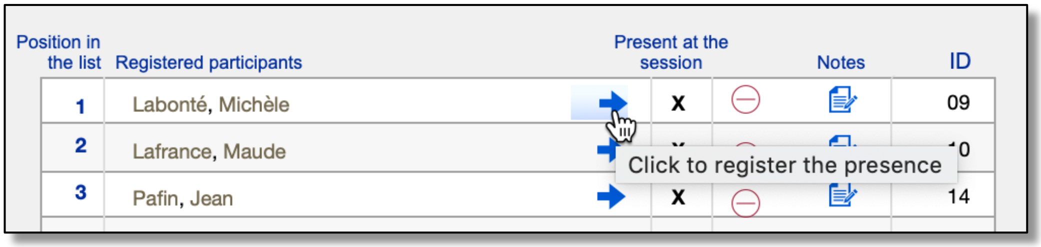
Intervention team
Marco
Bibianne

Attendance
Lacoursière, Michel
Rigaud, Emmanuelle
Girouard, Jacques
Rivard, Martin
Barbeau, Alain

Attendance Total : 5 / 6

Summary of activity
Each participant tells how he felt after the funeral ceremonies....

For the names of the participants are listed in the summary as shown above, it is essential to use the button-shaped blue arrow to enter an "X" in the column of the participants present. This action is also necessary if you want to invoice the participation to each participant.



7. Messages Exchange (Communication off therapy)

7.1 Sending a message with BaseDPsy

BaseDPsy does not receive messages directly as mail software, but can send them.

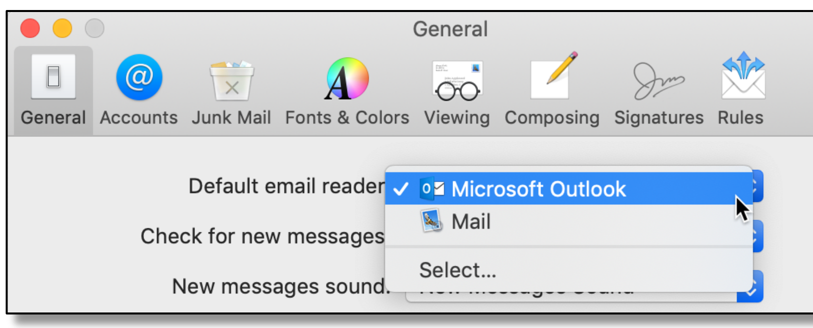
There are several tools inside BaseDPsy to send a message, and in different sections. There is, however, a special section to interact with clients recorded in BaseDPsy, this is the "Client Communications" section.

There are also two different methods for sending an email with BaseDPsy. The choice of the method is defined by the way you enter your information in the "Options" section.

Messaging through your local mail software

In the "Options" section, you can enter information about an SMTP address used by you. If you do not fill in the relevant sections, the sending of message will go through your default mail software installed in your computer. When you click on a tool to send a message: BaseDPsy will try to open your mail software (For example, Mail on Mac, Outlook on Windows, etc) and will open a message in draft format, which you will have to complete and send with your mail software.

With MacOS, the default mail application can be chosen by opening the "Mail" application, then the "Mail" preferences, general tab.



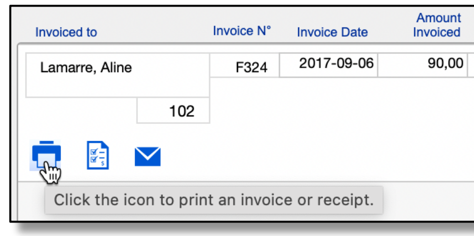
With Windows, you have to go to "Settings / Apps / Applications by default".

The information entered in the BaseDPsy topics about your message will be inserted into the draft created in your mail software. You can then, if you want to add a document to the message from your mail software.

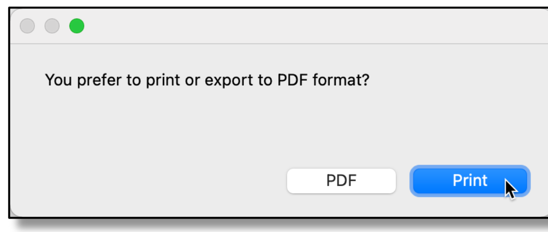
However, this method is dependent on the definition of your default mail software, and also the compatibility of your mail software with FileMaker, BaseDPsy being programmed from FileMaker. Finally, it also implies that you use mail software built into your computer and not a webmail service accessible by a browser (web browser).

If you are using MacOS and the mail program "Mail", there is a shortcut that allows you to send your documents and invoices by Mail without the need for SMTP settings.

Here is an example with the printing of the invoice

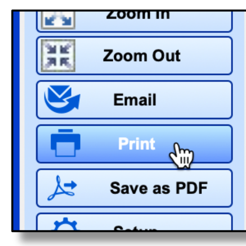


1. Click on the icon to print the document.

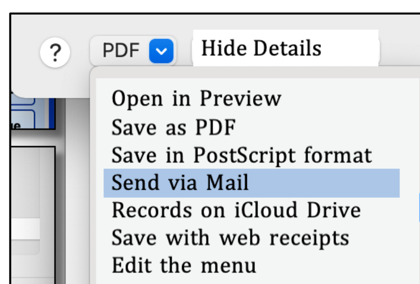


2. Select "Print".

3. Choose "Print" again in the tools that come with the document preview.



4. In the window to set up the printing parameters, click on "PDF".



5. Scroll down the menu to "Send via Mail" and click on it.

SMTP messaging

To send an email via SMTP, you must enter the SMTP server address in the "Options" section under the "Implication / Content / Address" tabs.

Using the SMTP address allows you to send emails without going through your mail software.

In the "Communications" section, you have fields to enter the subject of the response (or message) and the message content, so there is no additional window that opens.

Here's how to set the options to use sending email directly from BaseDPsy.

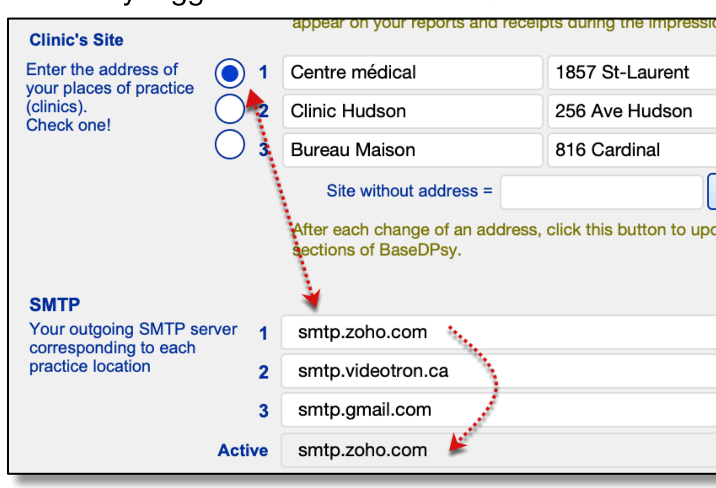
If you do not enter an SMTP address, the active SMTP remains empty. And when the active SMTP is empty, when you click on a tool to send an email, the procedure will automatically go through your email software.

Conversely, as soon as an SMTP server address is active, BaseDPsy will use the SMTP address first.

The choice of the "Clinic's Site" automatically triggers the choice of the SMTP address when you have more than one input.

Conversely, as soon as an SMTP server address is active, BaseDPsy will use the SMTP address first.

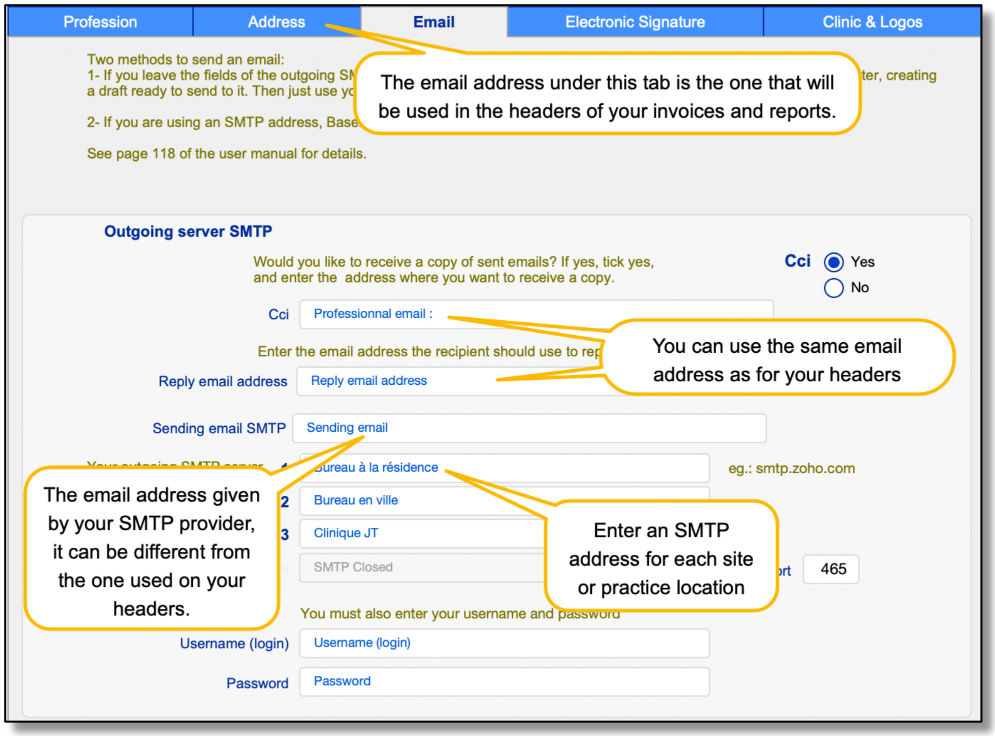
The choice of the practice location automatically triggers the choice of the SMTP address when you have more than one input.



The active SMTP is changed each time you change the check mark next to the Clinic's Site.

In the illustration, you can see that numbers next to the SMTP server addresses indicate where each SMTP address is located.

When using an SMTP connection, you must also enter the access codes (Account Name and Password) and the default port.



The default port used in BaseDPsy is 465 because we have programmed the use of the connection procedure with the SSL encryption protocol. As a result, you will also need to add your username (often corresponding to your email address) and your password.
However, check with your e-mail provider, which is the port number, as this may be different from 465.

Obstacle to the use of GMAIL for sending by SMTP

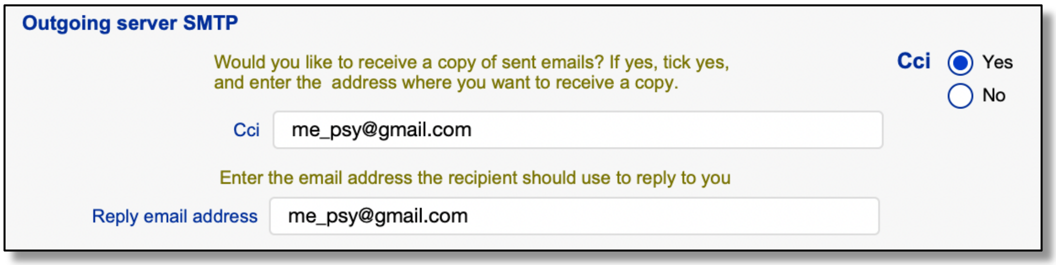
If you have an "@ gmail.com" address you will not be able to send e-mail with BaseDPsy, the reason is that Gmail has added restrictions (two-factor authentication) which means that third-party applications are blocked; with Gmail, you have to either use email sending software or use their website.

The solution is to have another email address that does not require dual authentication for sending via SMTP and to use your gmail address as a reply address only. This way you will be able to continue to use your usual gmail address with your customers.

Here's how to apply the solution of two email addresses, one to receive your mail through "gmail.com" and the other to send your emails through an SMTP address that does not require double authentication.

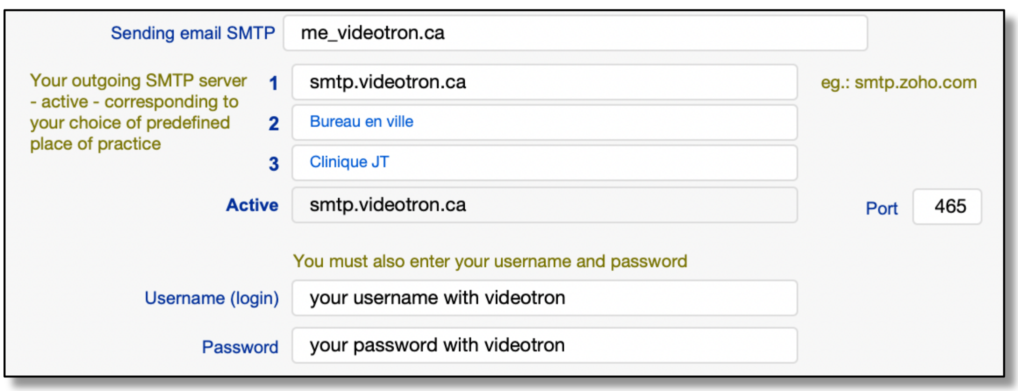
Let's assume that your email address known to customers is "me_psy@gmail.com".

You will therefore continue to use your gmail address with your customers as if nothing had changed: and in the "Options" section of BaseDPsy, you enter this address in the "Bcc" and "Reply email" sections. This email address is your mail reception address.



But in the other sections, you will use a different e-mail address obtained from a supplier that does not require double authentication, for example Videotron.
So, let's assume that your sending address is "me_videotron.ca".

With this method, your customer will not see the shipping address, he will only see your "reply" address, i.e., "me_spy@gmail.com".

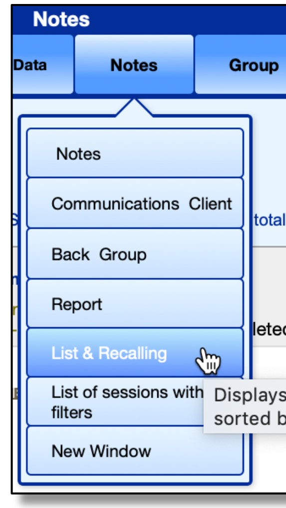


An SMTP sending address that does not require double authentication will be provided free of charge to those who use our hosting service, and we take care of defining your SMTP sending parameters ourselves.

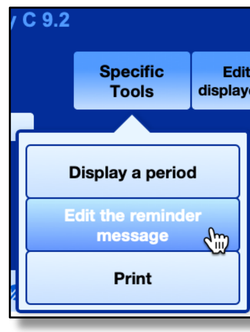
Thanks to the SMTP sending and the possibility to create " PDF " documents directly with BaseDPsy, offered by our hosting service, you will be able to email your invoices and receipts (with a single click).

7.2 Remind to the client the next appointment by email

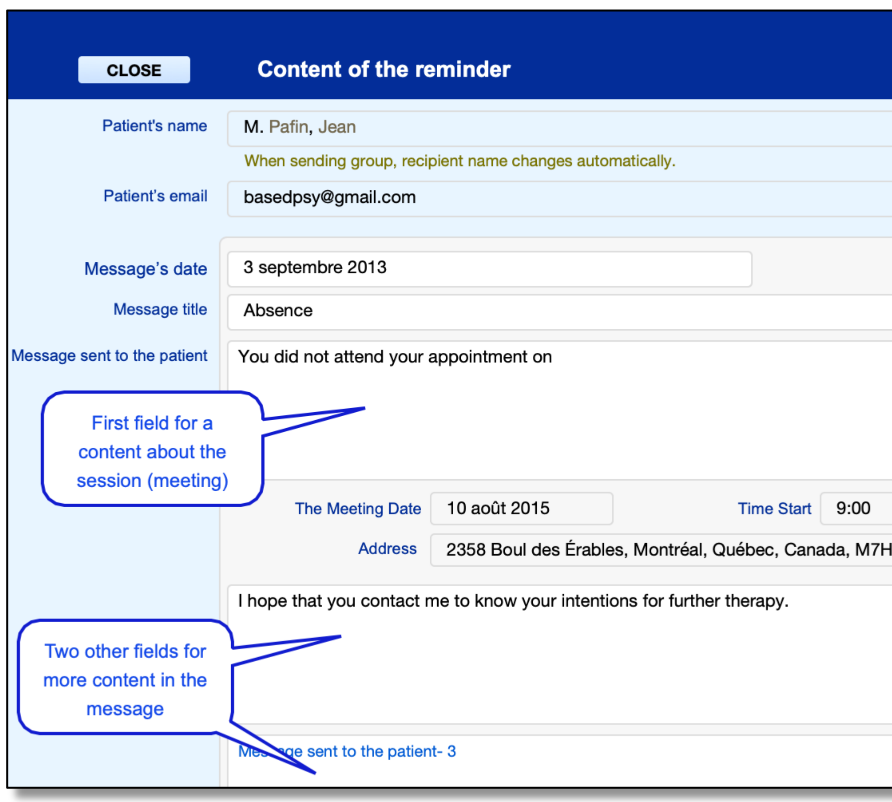
In BaseDPsy, we have provided a function to send your customer an email to remind him of the date of its next appointment with you.
View first interface of the "Sessions list by date" in which another button give you have access to another interface to write the content-type of the email you will send when recalling the appointment to your client.



You have access to this interface by clicking the "Edit the reminder message" button.

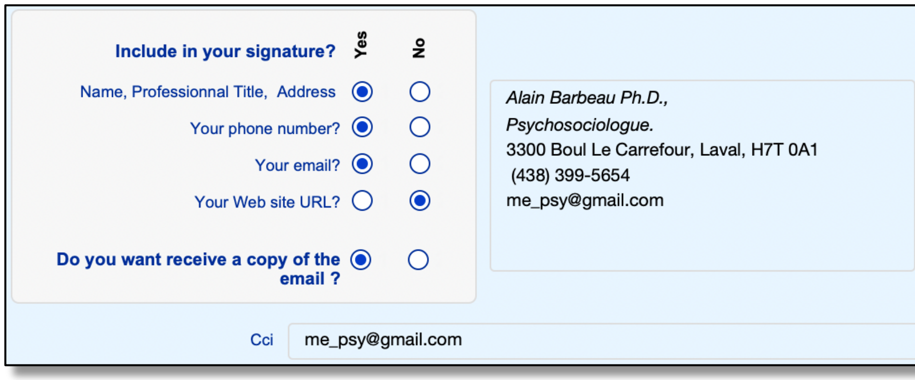


The interface to write the reminder offers several sections to compose the message. The white fields are modifiable. Non-editable fields in this interface are modifiable in other interfaces, so are these: the email address of the client must be entered in the "Data Client" section, your signature and address in the "Options" section, the date and time appointment in the "Notes" interface.



For the signature of the email, you have several choices

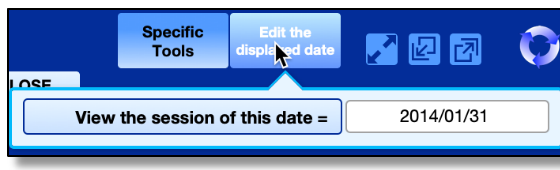
We recommend that you check YES to "Would you like to receive a copy? "to ensure that the client has received the email.

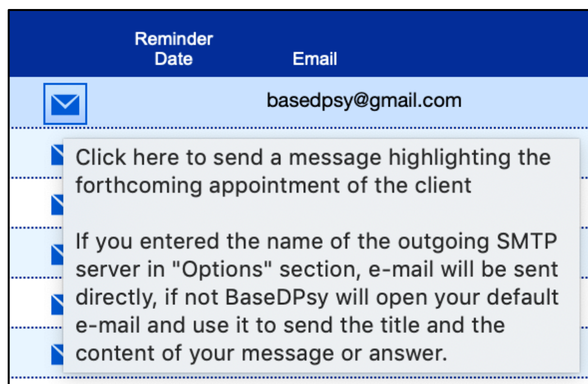


7.2.1 Send a reminder email manually

To send the reminder emails one by one, you first display the "List & Recalling".

You choose the date of appointment in the message by entering a date in the search field at the top of the list interface.





For an appointment to come, you must have been created in advance the appointment in the « Notes » section.

You send the message by clicking on the button showing an icon of envelope.

7.2.2 Semi-automatic sending of reminder emails

In order for the procedure to work properly and for the client to receive his reminder, there are several conditions that must be met before opening BaseDPsy:

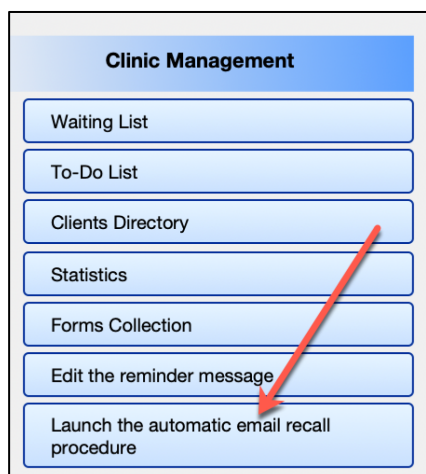
1. The procedure only works if you use an e-mail software (applications) (Mail, Outlook, etc.) on your computer or if you can define your SMTP settings in the Options section (See previous chapter). Please note that Gmail refuses SMTP mailings operated by applications other than e-mail software.

2. In the "Options/Identification/Content/Email" section, you must have activated the procedure and have set a number of days between the date the reminder is sent and the date of the appointment. We suggest a minimum of "2" days, but for appointments on Monday, it takes three (3) days, if your last opening of BaseDPsy is on Friday.

3. In the section "File/Registration", you must have checked the section "Wish to receive a reminder of the appointment by email".

4. Other regular conditions are also present:
   a) You have defined your reminder message.
   b) The customer's email address has been entered in the Data section.
   c) Your email sending information in the "Options" section has been entered; If you are not using SMTP sending, as many drafts as reminders will be created in your email program, which you will then have to launch manually.
   d) A reminder email has not been manually launched before from the "List & Reminder"; i.e., the automatic reminder does not repeat a reminder email that has already been sent.

Once all your settings have been defined: you can launch the procedure by using the button to this effect in the Menu section:



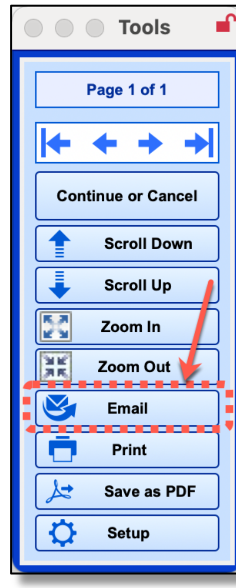
7.2.3 Sending automatic reminder emails

For those who use our hosting service, we have a procedure on the server that will automatically launch the reminder every morning. However, you have to ask us for this automatic procedure to be activated.

7.3 Sending a document by email

7.3.1 Send a document by email using the SMTP procedure.

See the previous chapter on "SMTP Messaging".



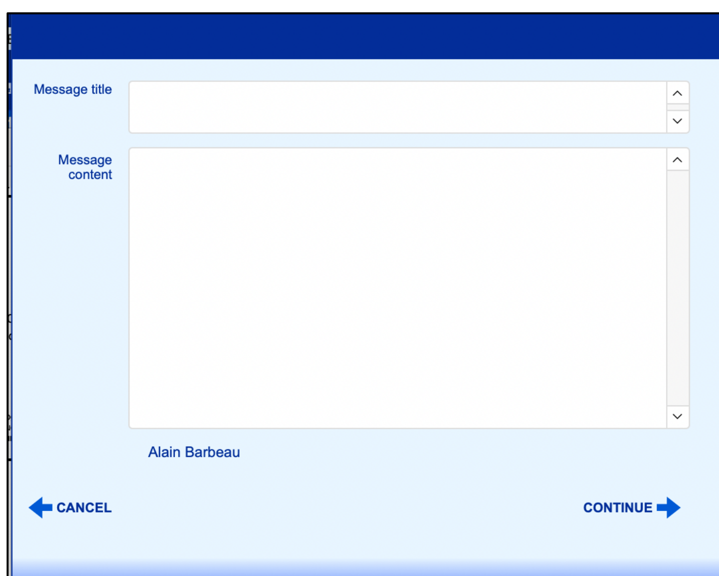
When you have a functional address for sending e-mail by SMTP, there is an additional tool in all folders concerning persons (Folders, Data, Notes, Communications, Report sections) when you request the printing of a document.

When the document is previewed, the toolbar that accompanies the preview contains a tool that allows you to send the document by e-mail.

When you use this tool to send the document by email included in the toolbar of the document preview, the procedure includes adding a message

If you click "No", the document is sent without a message.

If you click on "Yes", a window will appear to enter the content of your email:



We have also created specific tools for sending documents by email in addition to the general tool integrated in the preview toolbar.

7.3.2 Send an invoice, receipt or report by email without sending it via SMTP.

If you are using the message sending method that goes through your local mail program, all you need to do is attach your documents to the message.

All documents produced in BaseDPsy can be sent by e-mail. However, you must first save the document in PDF mode or as a stand-alone file by exporting it in Excel or Word format.

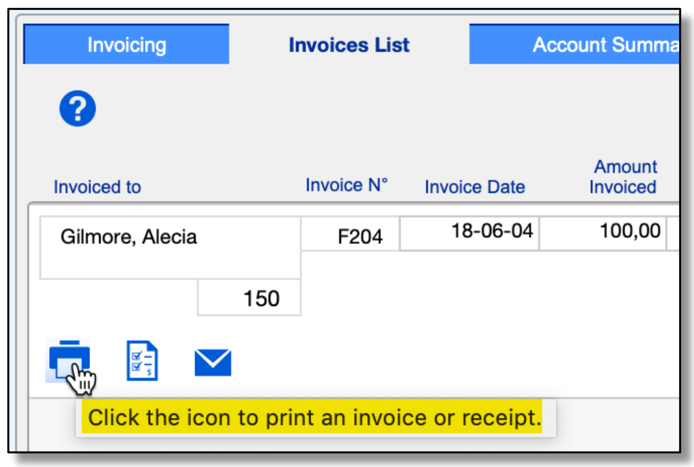
Therefore, to send your invoices and receipts by e-mail, you must transform them into PDF format.

The transformation to PDF format is included and automatic in the BaseDPsy emailing tools when you use Claris Filemaker or FileMaker Go to open BaseDPsy. Claris FileMaker is included in the hosting package offered by BaseDPsy.

First launch the printing procedure

And follow the procedure up to the moment of printing on paper

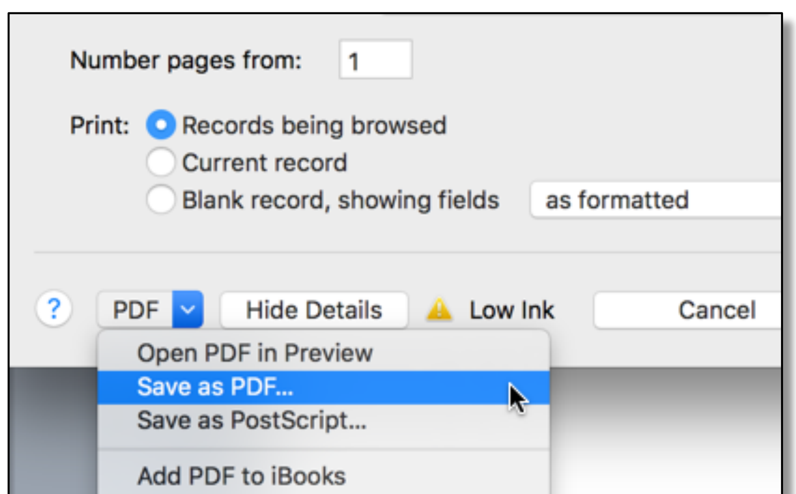
And when the dialog window for setting up the printer appears, choose either a virtual printer (PDF creator) on Windows or choose "Save as PDF" on the Mac, which is at the bottom left of the dialog window.



If you want to send a session summary it will be the same procedure.

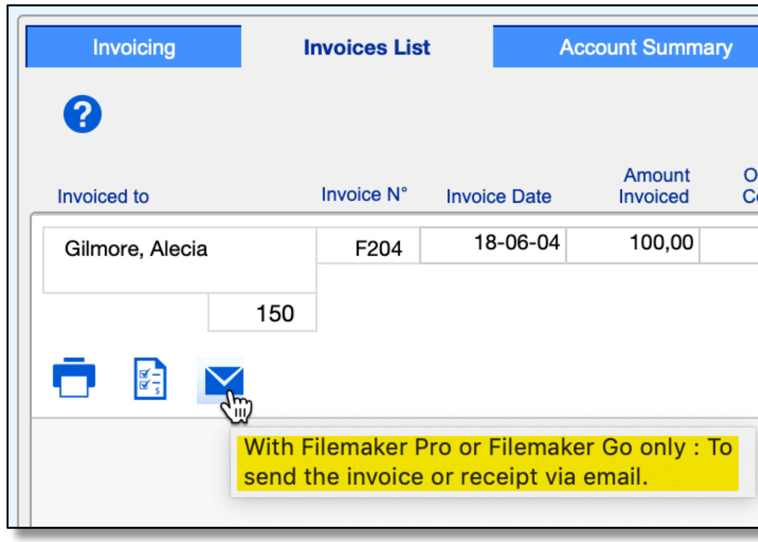
But you can also use the tools that allow you to export the content of a session in txt format, or those that allow you to export your financial or statistical reports in excel format.

If you open the "PsyTablet" data file with FileMaker Pro or Filemaker GO, an additional tool is available. It allows you to create the document in PDF format directly with BaseDPsy.



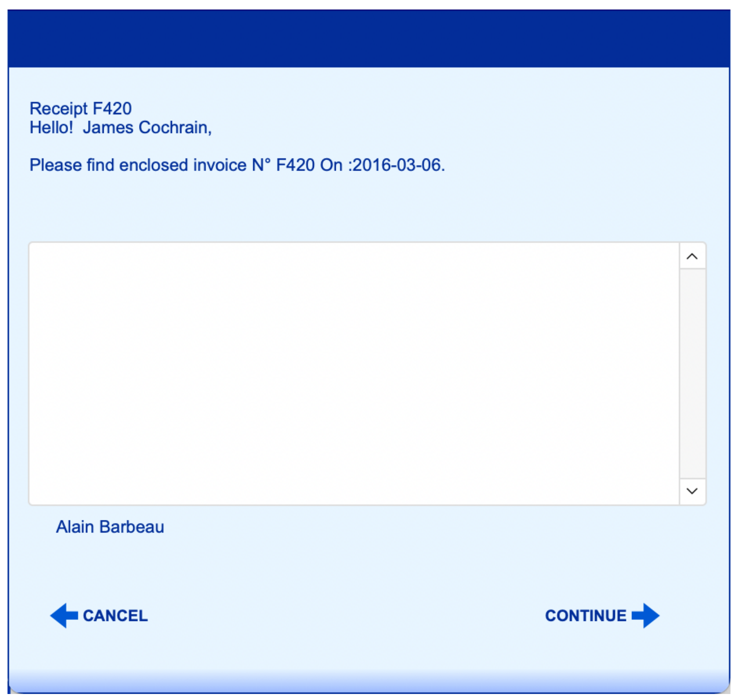
If you use the hosting offered by BaseDPsy, you will also find that this tool is available.

If you use an SMTP address to send the invoice or receipt and you use Filemaker Pro or Filemaker Go to open BaseDPsy, the procedure associated with the tool under the "Invoice List" tab includes an additional step to add a message



The dialog box displays the objects and the beginning of the message sent to the client and allows you to add a message.

The subject and the beginning of the message are not modifiable, but you can customize the rest of the message by writing inside the field.



7.3.3 Transforming documents in PDF format with BaseDPsy

If you want to send documents produced by BaseDPsy with your e-mail software installed on your computer or accessible via the web, you must transform the documents into pdf format.

If you use Filemaker pro or Filemaker Go (iPad) to open PsyTablet, tools are available to transform documents into PDF format, because these two applications have properties that the Filemaker Pro Runtime renamed "BaseDPsy" does not have. FileMaker Pro is included in the hosting package of your data by BaseDPsy.

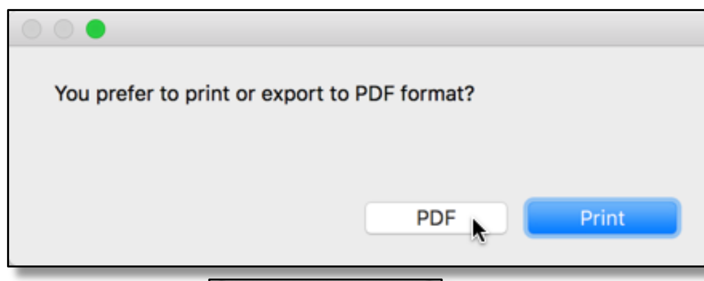
One of the properties included in these applications is to transform the documents themselves into PDF.

The additional tools are visible in different places of BaseDPsy, such as in the billing section of the sessions or in the invoice lists.

For example, under the "Invoice list" tab in the "Notes" section

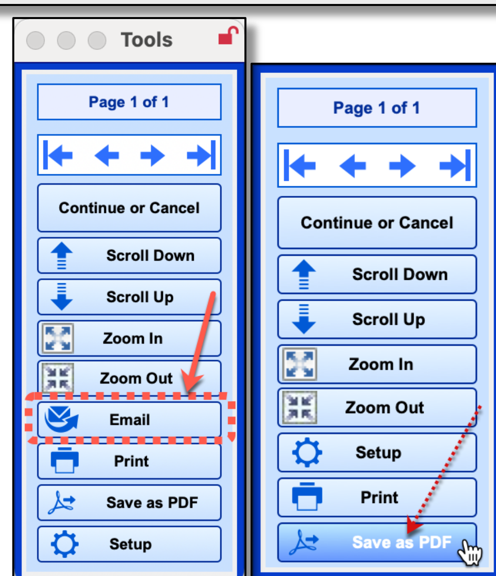
This tool transforms the Invoice or Receipt document into a PDF and associates it with the email that will be automatically sent to the customer's email address, provided of course that you have entered it in the Data section.

Furthermore, if you use the print tool, a first dialog box will ask you if you prefer to export it in PDF format or print it on paper.



Finally, on computer, when you ask for printing, an additional tool is also present in the list of tools when you set the preview mode.

With an SMTP sending address, an additional tool allows you to send a document in preview without having to convert it to pdf beforehand, because this will be done automatically by the procedure.



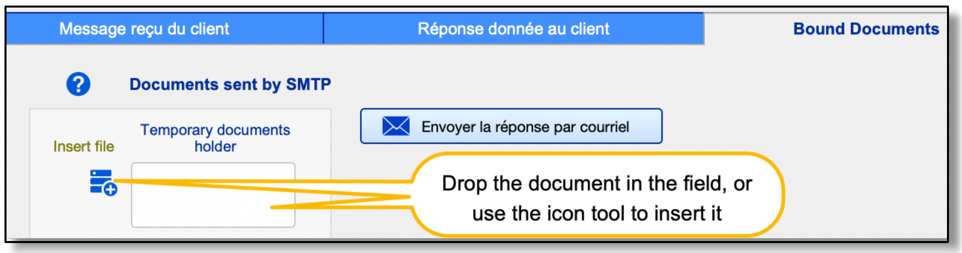
7.4 Using the « Communications » section

"Messages Client" section allows you to store messages received from a client and your answers, but BaseDPsy is not an email software.

The "Message" section is designed to be able to keep any type of message: a letter, a summary of a telephone call, a fax or email, etc..

The field named "Message format" allows you to specify the category of messages.

Spaces under "Bound Files" tab allows you to insert electronic files that can be either letters and messages written on paper you have digitized (scanned) or attached to an email file.



If you are using the SMTP sending procedure, to attach a document, you must display the "Customer Communications" section and show the "Associated Documents" tab.

Under this tab, you will see a section that allows you to attach a document to the message.

It is also important to note that the document inserted in this section will be deleted after the email is sent. This is a temporary document holder. If you want to keep it in BaseDPsy, you can insert it again in one of the five underlying document folders (Documents received) by adding an explanation in the "title of the associated document".

If you also mention the document in your message, you will keep a trace of the document sent, which, in principle, is still in your computer.

The question marks in the interface remind you of the main instructions for using the tools present.

Since communication with a professional is not always an alternative exchange of messages as with letter or e-mail, but sometimes it is a live or telephone discussion, we have added a tab that contains the necessary headings to summarize a discussion.

7.4.1 Two interfaces available to save your communications

Two different interfaces have been created to write or to keep exchanging messages with your clients. An interface is specialized for individual clients you entered in psychotherapy and another interface has been designed specifically for institutional clients.

The difference between the two interfaces based on the following findings:

Psychotherapy Clients:

- Your communications can be directly with the client.
- Your communications can be with another professional serving your client, eg the professor of your client of school age, the physician or psychiatrist of your client, etc. ..

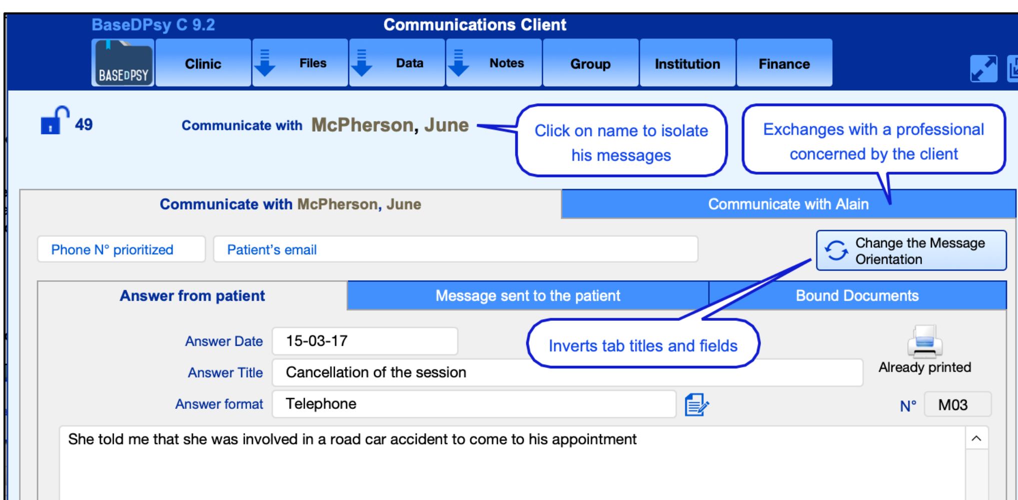
Institutional Clients:

- Your communications can be only with a professional representing the client..

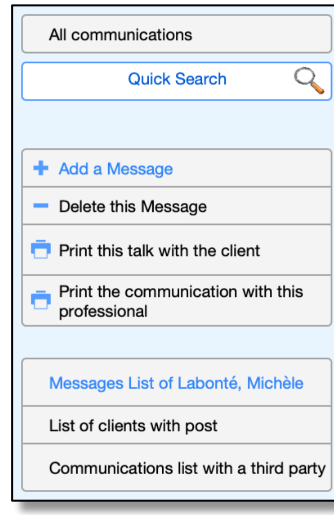
In « Messages Client » interface with registered clients in a psychotherapy, the number of tabs and sections is larger and offers more opportunity to withhold information.

Both interfaces are however not watertight, it is possible in either interface to view information belonging either to institutional customers or clients in psychotherapy.
However, when you click the tool button "Show All", the procedure displays only all clients specific to the interface in the foreground.

Here the appearance of the interface communicating with a client in psychotherapy.



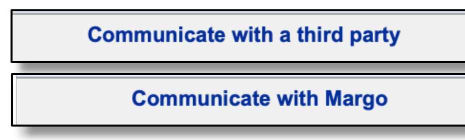
The message in the list named « All communications » also allows you to move from one interface to another by clicking on the message row, which will have the effect of displaying the message in its original interface.



The « List of clients with post », open in each interface, is specialized according to the kind of the clients. However, the lists show only the names of clients or representatives with whom you have registered a communication: The list of "Messages Client" interface displays only the names of customers with an active file in psychotherapy, while the list in the "Messages Institution» interface displays the names of the representatives and names of the client institution.

Clicking a name in the list will display only communications with this person in the same interface. If you click on "Institutional Clients" or "Data Client" buttons or the top of the interface, you can view the data on the same client.

To display the "Messages" section, you must unwind the "Notes" menu to the client in psychotherapy, and the "Institution" menu for communications with a representative of a corporate client.



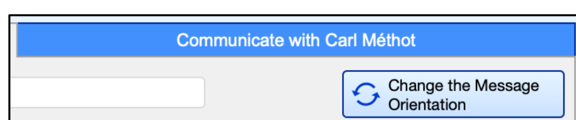
You will also notice that the title of the "professional" tab or “third party” change when the interlocutor or representative is identified in the relevant section.

The advantage is that the name of the professional related to your client is always displayed, even if it is not its tab is active.

7.4.2 Communication Direction (Message sent or received?)

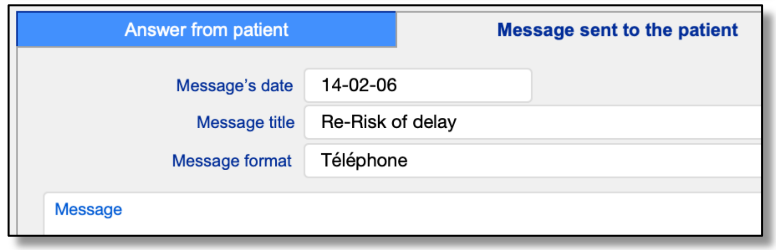
Taking account of who begins the discussion or exchange, communication can be a response from you sent to a previously received message. But it may also be that the message has initially been sent by you, waiting for an answer that you will later.

In order not to multiply the tabs and fields to reflect the direction of the initiation of the message, we have integrated in this interface a versatility of fields titles and tab titles.



So you can change the orientation of the initiative of the communication using a tool.

As an example, here is the display before the changing direction and the display after the changing direction :



7.4.3 Receiving a message

It is not possible to directly receive emails from a client in BaseDPsy. You can only copy emails received from your email software and paste them into the field for this purpose BaseDPsy.

7.4.4 Sending a message

However, you can send your response from BaseDPsy after having written it in BaseDPsy.

The shipping tool of emails is in the right tab. Its title may however change according to the direction of the communication.

BaseDPsy sends the email directly only if you have entered a valid SMTP address in the Options section.

Otherwise, it opens your e-mail software and inserts a new message with the address of the recipient, the content and the object you wrote in the BaseDPsy topics. The behavior is different depending on the platform of your computer and the mail software that you use.

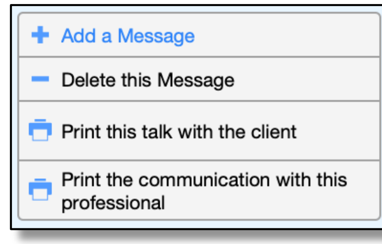
We observed, for example with Microsoft Outlook 14 on Mac OS 10.9 or Microsoft Outlook 15 on Windows 8: the message is created by Outlook in a new message window and it only remains to click "send" to that Outlook sends the message.

The same behavior is observed with the iPad: the "Mail" default iPad software opens a window with the content of your message and the recipient's email address and other settings: you still have to click "Send».

7.4.5 Recording a new communication

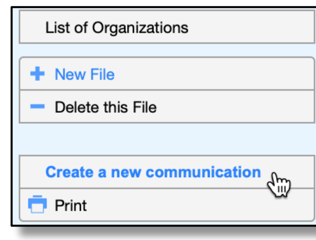
In the interface messages, there are two tools that allow you to add or delete messages.

When you use the "Add Message" button, the procedure asks you whether it is communication with the client or with the organizational representative who is in the foreground and then gives you the option to create a communication with the client displayed or with another. If you choose "Another", that choice adds a step in the procedure, which will lead you to choose an interface for the client.



There is a way to avoid this step if you have already registered a communication with him: is to put the client in the foreground before clicking the "Add Message" button.

There is a second way to avoid this step for institutional clients if you are in the "Institutional Clients" section: a button allows you to create a first message, so an exchange with a representative with whom you have not yet recorded communication.



You will also find that there is no tool that allows you to record communications with people who have no personal or institutional file in BaseDPsy.

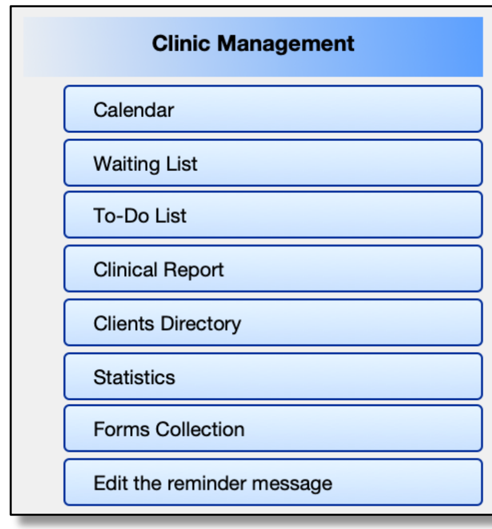
It is therefore a limit in BaseDPsy for participants in group therapy who do not have a personal file.

However, with regard to representatives of an organizational client, you are not limited by the fact that there is only one field to enter the name of the representative, because the messages are identified on behalf of the institution and in the section "Messages Institution" you can change the "Professional Name" and related fields by other content than one added automatically previously.

Clinic Management

This generic title includes some additional functions to create folder and note taking. If we also find there writing reports is that the function is for all types of clients, not just those in psychotherapy.

The calendar is available in the "C" version of BaseDPsy.

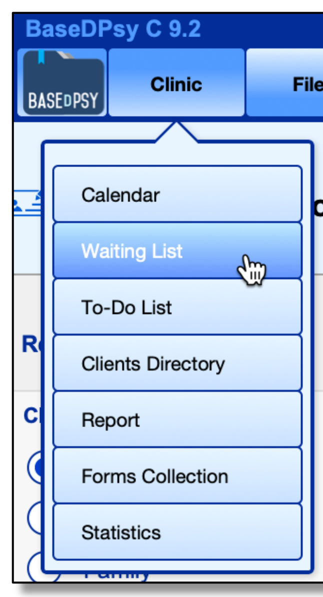


8. Waiting List

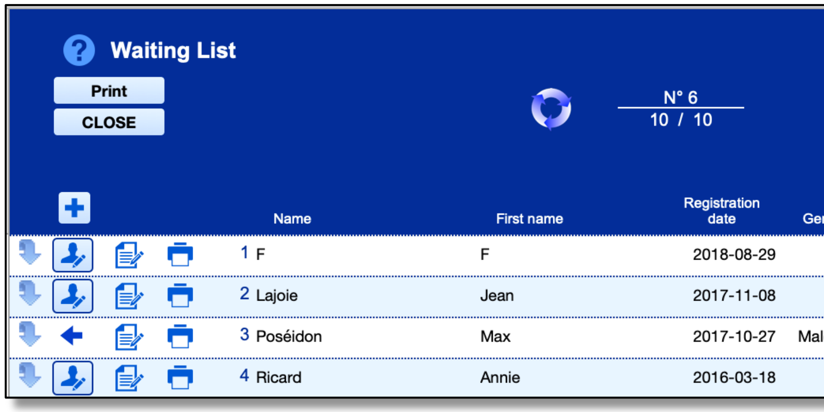
The waiting list allows you to manage those seeking services from you and they are willing to wait until you are available.

The interface is available from the Menu interface or from the header menu.

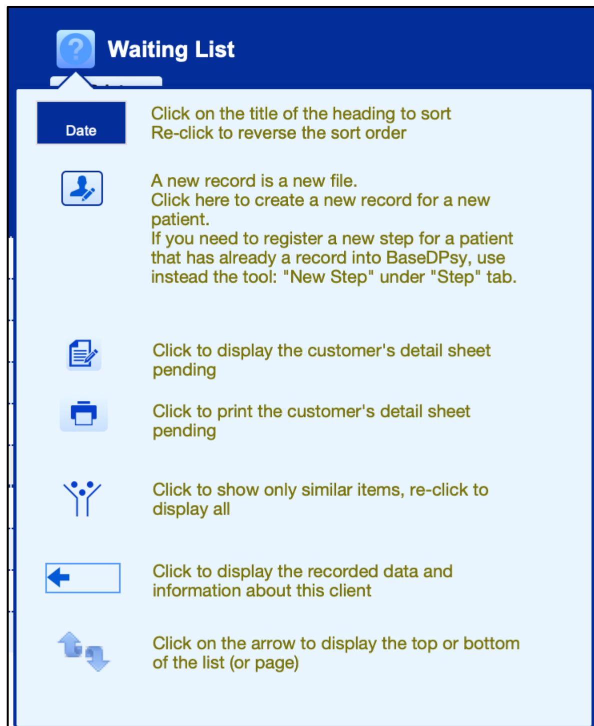
The list allows you to enter information about the candidate and his reference. The registration date is the date of the addition of item on the list. When you create a new record (new entry row), the procedure enter the date of the day automatically as the registration date and the words "Waiting" in the field "Status."



A preview of the list.

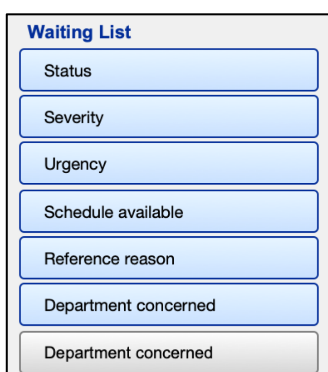


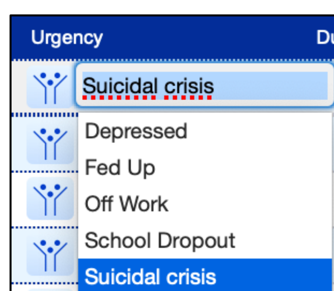
All the tools in the list are explained in the question mark.



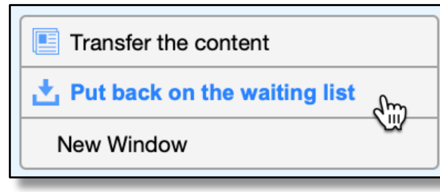
Thus, each column title is also used to sort the list according to the elements contained in the column, alternately in ascending order and in descending order

Many fields like « status, severity, urgency », have a drop down menu.

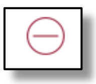




Field values with a list of values can be changed in the "Options" section, under tabs: “Data gathering/Waiting List”.

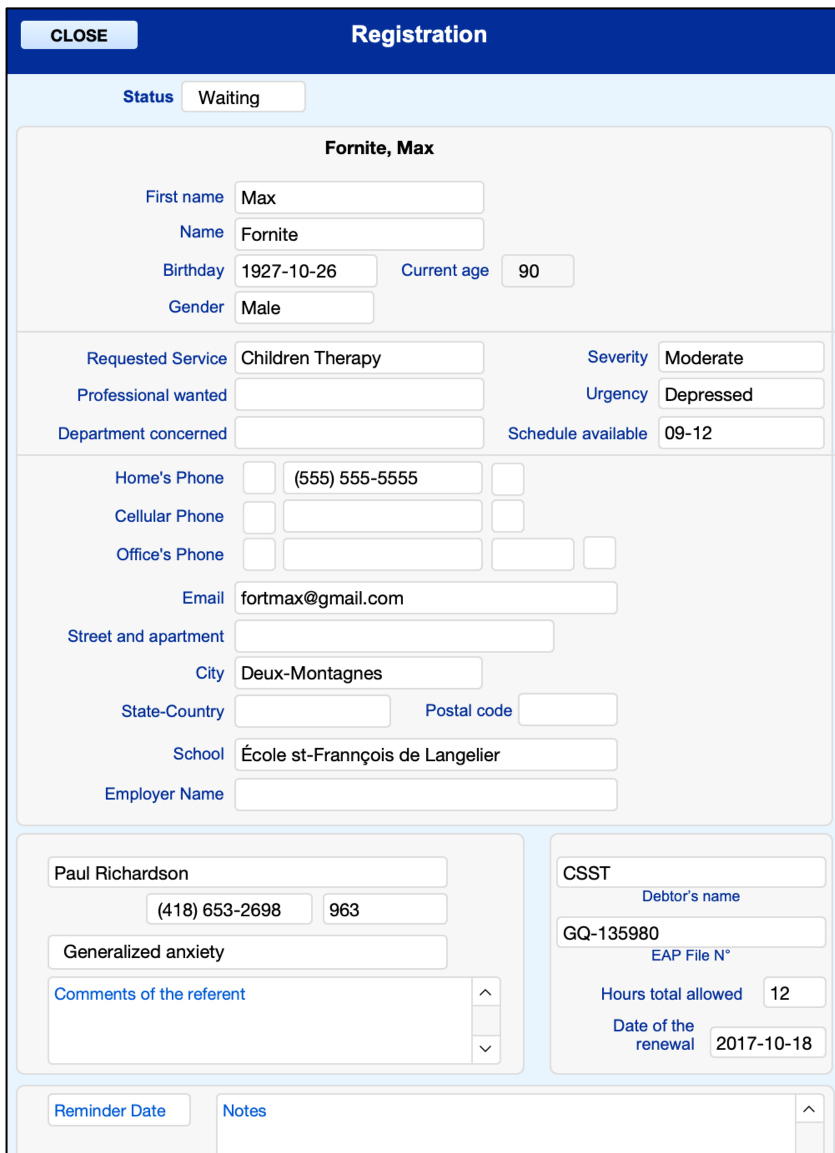


With specialized buttons (yellow), you can restrict the display in the list to those that have the same value in one or other of the headings "Status, Severity, Urgency."



The red button with the symbol "Minus" is used to delete a row. The deletion can not be undone.

This tool allows to redisplay the detailed sheet of the request, shown opposite.



When a new entry is created in the waiting list, a floating window is displayed to enter coordinates and reference information. There is more information than in the list, and this information is kept to be copied to the file (Data section), if a file is created later.

In addition, a termination date (day date) in the list is entered in the date of delisting.

A tool in the "Files & Requests" section and in the "Data" section to re-enroll a client whose step was closed and who is asking for your services again.

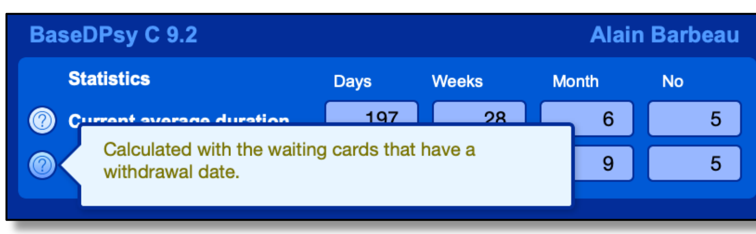
If his name is already on the waiting list, only the registration and withdrawal dates and status will be changed;
If his name has been removed from the waiting list, a new registration will be created in the waiting list with his name, first name, sex, age, date of registration and phone prioritized and the status of waiting; for the rest, you will need to enter manually.

Waiting statistics

The interface displays a statistical table that automatically adjusts to each addition or removal from the list.

The "Current average duration" is calculated with the number of persons still waiting, so from that ones whose the "Delisting Date" is empty. The "Average duration prior" is the average duration of the waiting time for those which are no longer waiting..

Click on the question mark to remind you of the meaning of the different durations

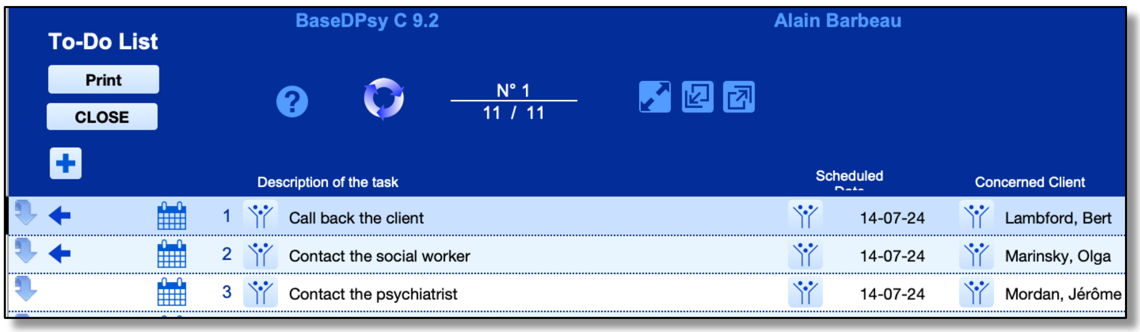


9. To-Do List

This list is a tool for planning your activities other than clinical therapy sessions.

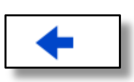
The task list is a good tool to remember the activities you have planned to do between therapy sessions.
You can use it to remember :

- which clients you must remember to call back or
- what reports waiting to be written,
- the professional should be contacted about any client, etc..



The field to define the task retains in a dropdown menu all your previous entries. In other words, the list of values available in the dropdown menu is built as you are using it. Double-click in the field to add a new value, when you do not want to use one of the values already included.

This funnel-shaped tool in the row is used to isolate tasks with the same value in the same topic.



The blue arrow allows to view the "Data Client" section of the concerned client in the task list. Note, however, that the link is correct insofar as the client's name is spelled the same way in both interfaces.

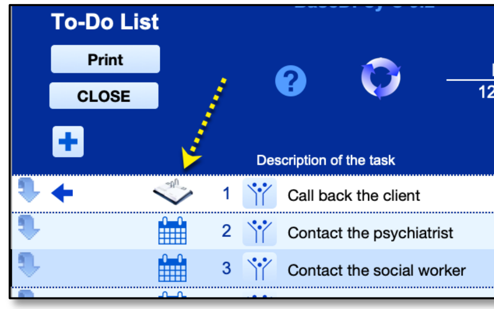
Each column heading is also used to sort the list according to the elements contained in the column.

Two tools are only visible in the calendar version.

 This tool copies the task into the calendar.

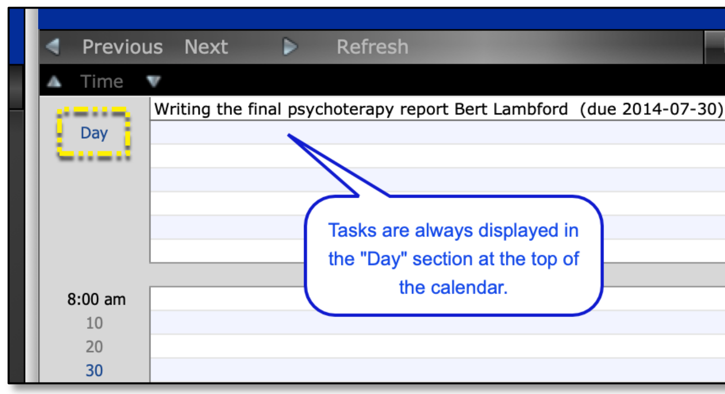
 This tool displays the task in the calendar.

9.1 Tasks and the calendar



In the version with the calendar (BaseDPsyC), there is an additional button to copy the task to the calendar as an daytime appointment.

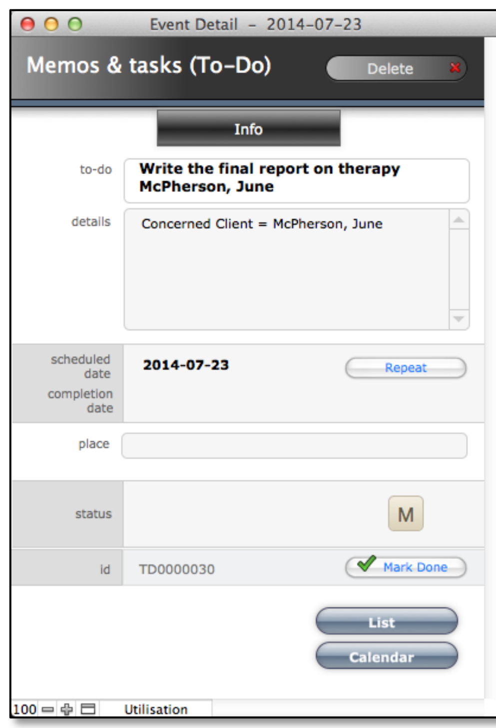
If the task has already been included in the calendar, the button displays the calendar on the date specified for the task.



asks are always displayed at the top of the calendar or in the section corresponding to the appointment throughout the day (without a start time and end time).

By clicking on the task in the calendar, a new interface is displayed.

The interface contains a few buttons whose utility is:



« Delete » = Clears the task in the calendar and the task list.

« Repeat » = Allows you to create multiple entries in the calendar with the same content. Note that if you ask three (3) repetitions, the procedure will add three times the task, so the task will be displayed four (4) times in the calendar.

If you "repeat" a task, we suggest that you manually enter in the "task list" the last date of repetition as " Scheduled date" and to include the word "Repeated" in the status field.

« Mark Done » = The procedure then sets the status as "completed", and adds the date in this interface as "completion date" and in the interface from the list of tasks as "date of delisting".

« List » = Close de window and display the To-Do List interface.

« Calendar » = Close de window and display the task date in the Calendar interface.

9.2 Add "Memo" or "To-Do" in the agenda

First Method:

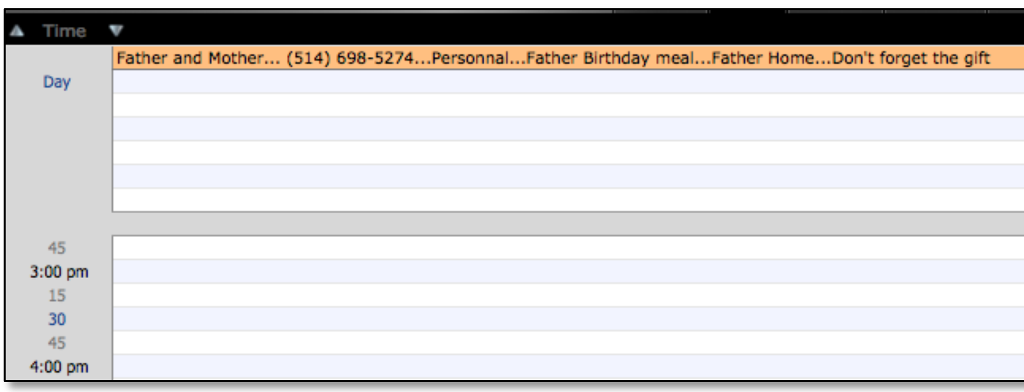
1. Got to the To-Do List section;
2. Add a task;
3. Clone it in the calendar.

Second Method :

Create an event by selecting "Other" tab without adding hours of the appointment.

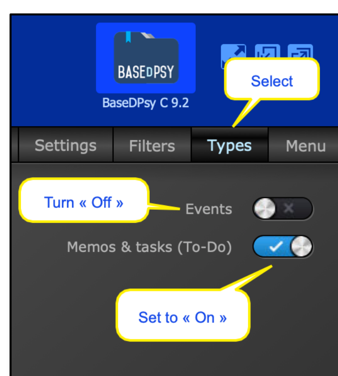
Whenever you add an event or appointment in the schedule without entering start time and end time, it displays the event in the top of the agenda, at the "Day" section, on the same location as the to-do.

Here is, as example, the event with Father and Mother of the previous page, but without start time and end time.



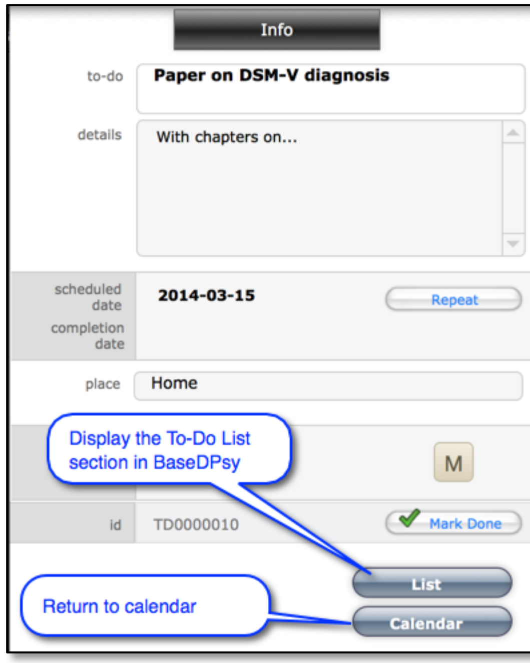
Third Method:

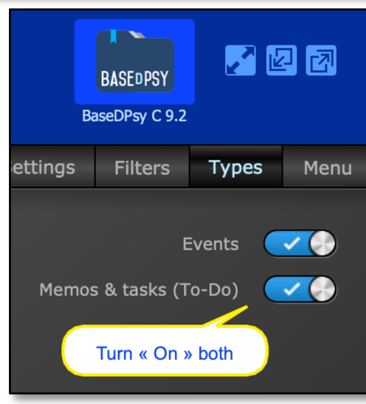
However, there is an interface specifically designed for memos. Here are the steps to create one:



1. Go to the calendar
2. See the "Types" tab in the left part of the agenda.
3. Turn off "Events" by clicking on the "Blue" section.

4. Go back to the right section of the calendar and click on the button « New ».
5. This displays a new window with the uncluttered interface of Memos and Tasks (To-Do).
6. Enter the content in the fields of your choice and click « Close and display the calendar ».
7. In the calendar, the task is displayed in the top section, if you let selected the « Types » : Memos & Tasks.
8. Go back to the « Types » tab, and turn on « Events» to see all your appointments.





10. A Clients Directory

The client directory provides a list of all your customers regardless of the nature of the service. In other words, the directory lists the psychotherapy the institutional clients and the participants in group therapy.

This is a tool that allows you to have in one place the complete list of persons registered in BaseDPsy.

When printing the directory you see more the specificity of the tools.


Belfroi, Richard **(450) 623-8596**
1485 Boul René Levesque, St-Eustache, Québec,
Conjoint(e) Bellefeuille, Jeanne (450) 623-8596
;

Bereavement support
Community Center
Participants
Lacoursière, Michel; (450) 623-5987
Rigaud, Emmanuelle; (514) 842-5632
Girouard, Jacques;
Rivard, Martin;
Barbeau, Alain;
John Placierati; (514) 895-2568
;

Carleone, Michel **(514) 695-2368**
1256 des érables, Montréal, Québec, Canada,
Conjoint(e)
;

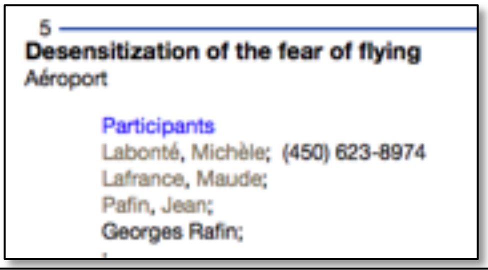
Commission scolaire de la vallée **(418) 659-2598**
1562 rue principale, Creuz, ,
Représentant - Contact Pierre Bellavance (418) 654-2313, ext: 12
;

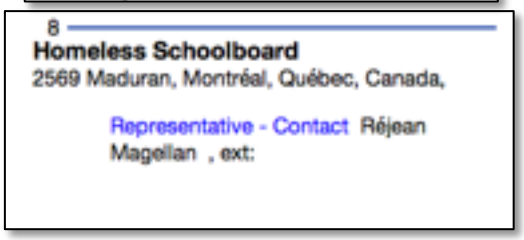
When printing, the procedure offers to select only the names of clients or to print the entire list. This option allows you to print only certain clients, as the last ones added. So you do not have to print the entire directory every time it is changed.

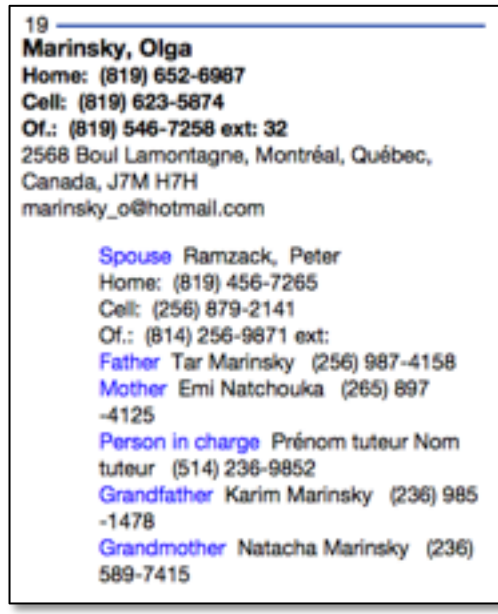
The phone numbers

For the client and his wife all the telephone numbers are present, but for other people, only the preferable number is displayed, so one in three for the father and the mother.

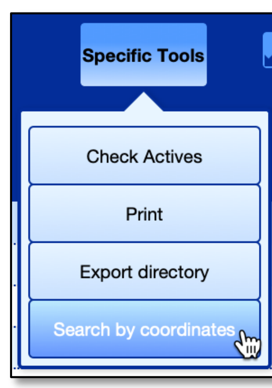
Here are three examples of display in the directory when asked printing.
For a group, an organisation, a client.







Searching by coordinates in the directory



The advantage of a directory is to quickly find a customer. A tool allows to launch a client search by its coordinates.

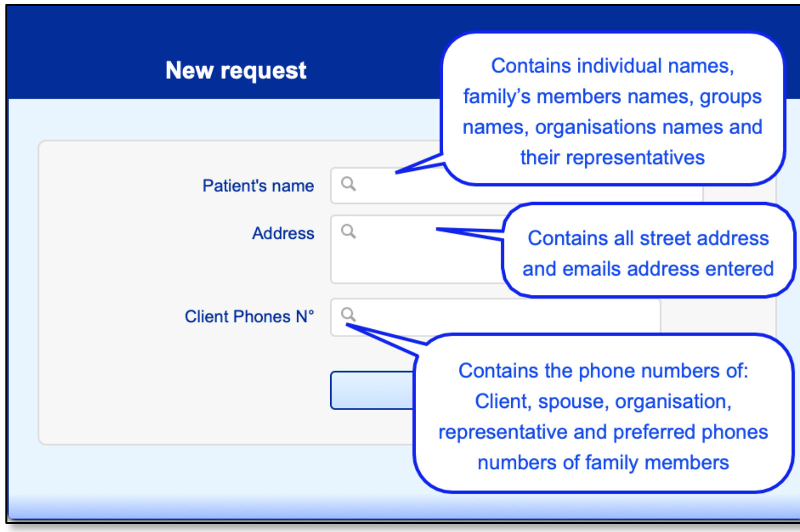
For example, suppose that someone called you and left you a message, but you cannot understand his name. However, the phone display shows its phone number. With this new tool, you'll know if displayed phone number corresponds to a client or someone in his entourage.

The email addresses are not always clear on the identity of the sender, again the tool enables you to find which person is associated with the email.

This search tool is available in two places: either in the "Data" section or the "Directory"; in this last section, it is located in the header menu named "Specific Tools".

However research in the "Directory" and in the "Data" section do not give the same results.

When the procedure in the directory is launched, it displays a window containing three sections.



Each of the sections contains all the information in the Directory, but only the information in the Directory.
The results are also displayed in the Directory.

If you want to cancel the search procedure, click on « Continue ».

Once the search is completed, the result is displayed in the directory, but displaying only the concerned client's record.

As the directory does not display all the phone numbers, you can then return to the Data section to browse through the various tabs and link the digits to the person sought.

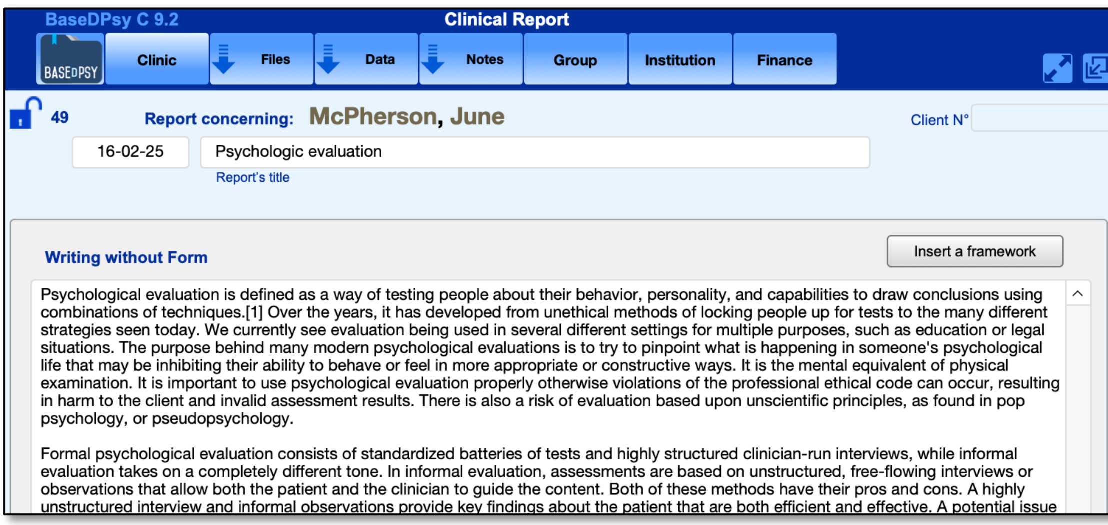
11. Writing clinical reports or intervention reports

The interface for writing reports is the same for any type of report, whether you write a report at the end of group therapy, psychological assessment report, a therapeutic result, or a report on a psychosocial intervention in an organization.

However, you have two methods available for your report: one by writing directly in the text section of your report, the other using a PDF form that you previously created or imported.

11.1 Writing without form

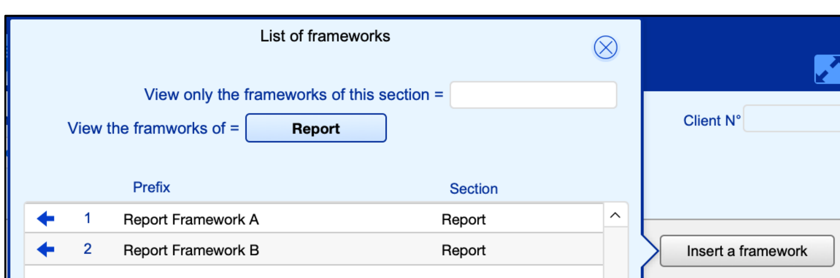
Under the tab "Info on Report", you can also note the identity of people to which you have distributed it and, if necessary, the password that you insert into the digitized format to send it by email.



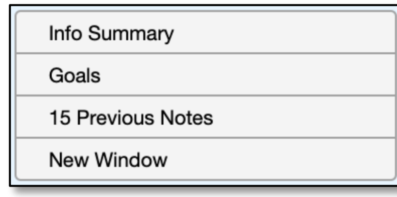
Tools of the report section are specialized according to the type of writing you choose. The tools to the right of the interface are for writing reports without a form.

For writing without form, it is also possible to insert an outline drafted. Two types of frameworks are available by default (in French).

They can be changed after displaying the "Options" section. You can also insert predefined contents specialized for reports and editable in the « Options » section.



We have added buttons to view client data without leaving this section. One opens a new window to display data from another section. The other allows to quickly display the goals and the intervention plan that were agreed at the start of the therapy.



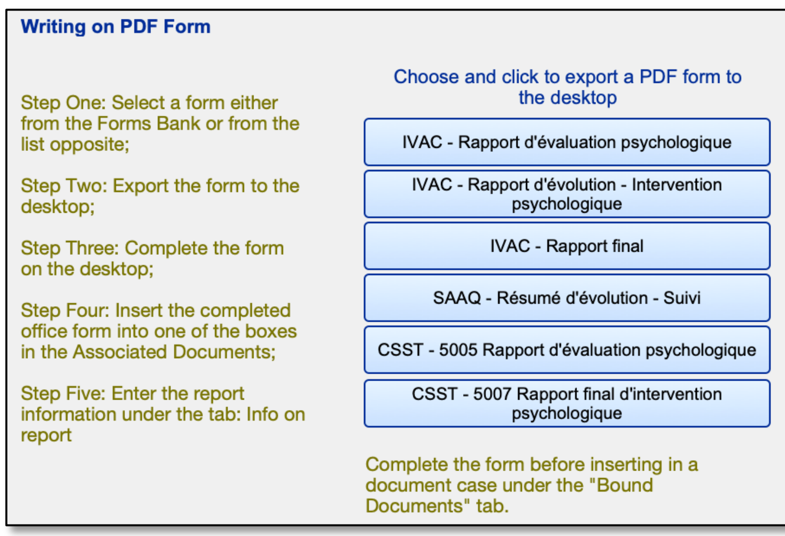
We also added a button that allows you to read the content of the last 15 sessions without having to leave the interface.

11.2 Writing on Form

The tools for writing on form are under the tab concerned.

The steps are also described under the same tab »

BaseDPsy offers you a form retention space in the "Forms Bank" section.
There are also forms required by certain Quebec debtors. The most frequently requested reporting forms are also present under this tab. By clicking on the title of a form, a copy of the form will be exported to the desktop.

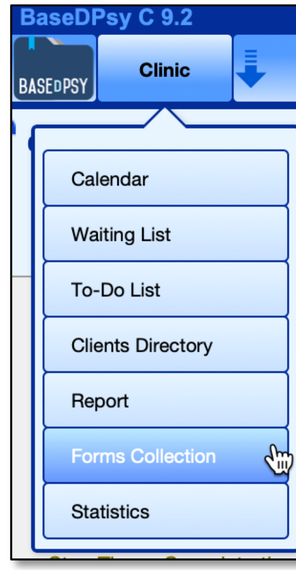


If you replace a form with the same title in the Forms Collection section, the title of the replacement form will be immediately displayed in the Report section.

Note: fill out the form before inserting it in BaseDPsy in order to keep the content written in the form.

12. Forms Collection

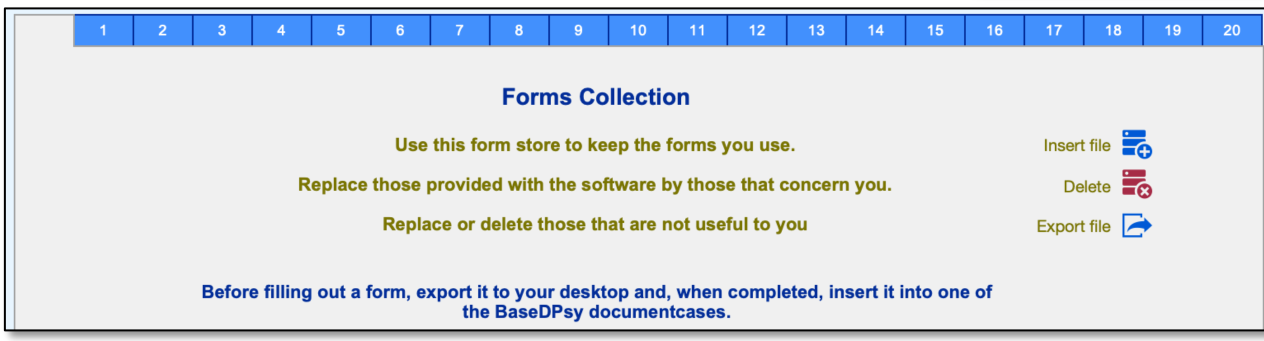
Files management may involve several documents provided by external services and forms other than BaseDPsy. In the administration section, you will find tools that can help you manage forms.



Forms collection is an interface that allows you to store forms in PDF format that you could use with your clients. This interface allows you to quickly access custom forms for data collection, standardized tests, questionnaires for assessment of mood, etc..

The forms library contains 20 spaces available. The first 17 spaces are occupied by francophones forms provided by debtors or downloaded from the internet. You can replace them with others of your choice.

There are several utilities in that forms collection or more ways to profit of it.

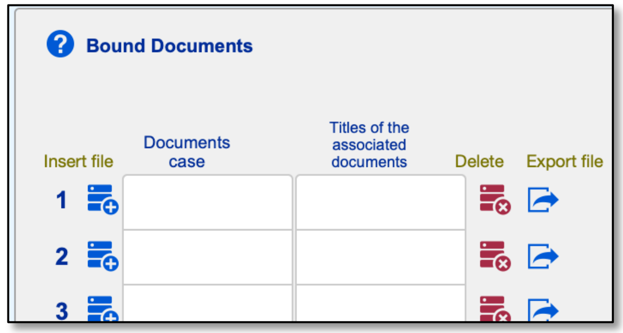


The first is to store forms that you can use in other sections there. For example, a data collection form designed by you or a colleague for child therapy or family therapy. You store it here and when you have a new client, you copy the blank form stored here, then you paste it in the "File Request" section in the PDF Admission Forms interface. Or you fill in it and you store it filled with the specific data of your client.

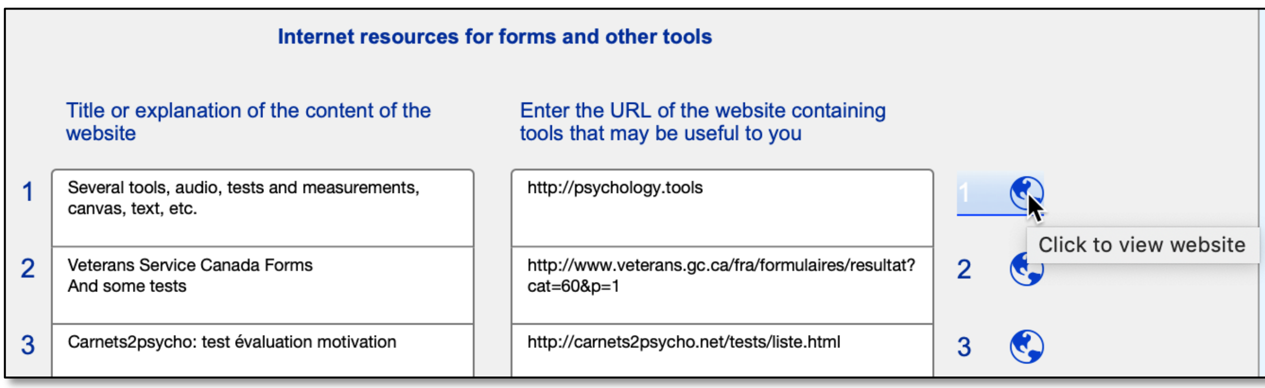
Another utility is to store in the Forms Collection an empty frameword that you will use later to make an evaluation report, and then paste in the report section.

The other use is related to the fact that you can export PDF form on your desktop, fill in the opening with a PDF editor like Adobe Acrobat Reader, and then import it into any section BaseDPsy in the a briefcase available as associated document (bound file).

Usage note: Generally, you retain the blank forms (empty) in the Forms Collection section, and when you want to use as an admission form or to use in the report section, you first must export on your desktop, you fill it, and then, you insert it into the admission or report section.



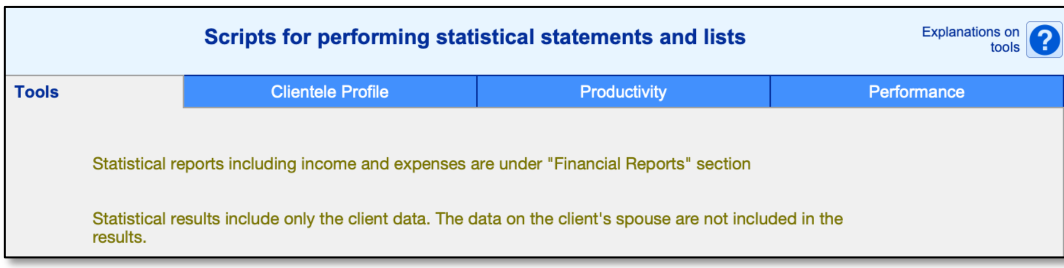
In addition to being able to keep PDF forms, the section allows you to keep web site addresses containing tools that can be useful to you in your professional work.



13. Generate statistical reports

BaseDPsy allows you to create statistical tables and customer lists based on certain search criteria.

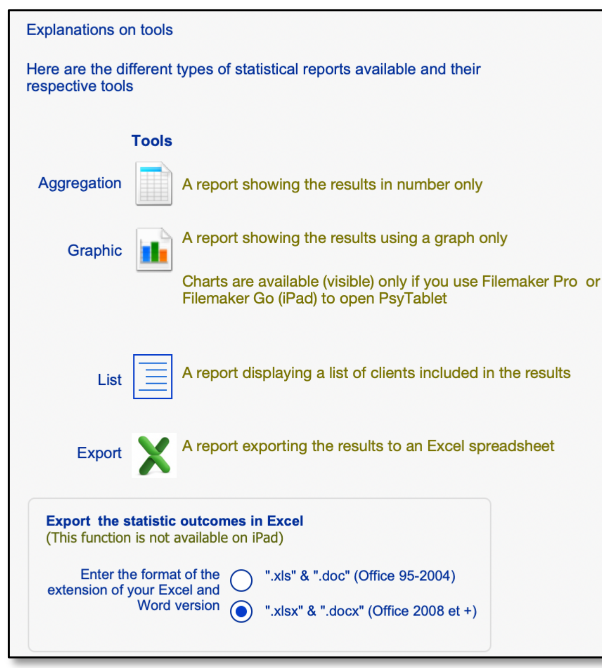
The reports or lists are presented under three themes: Clientele profile, productivity, and performance.



On the Tools tab and in the question mark button,, you will find an explanation for the type of product statistics report that can be:

- A report showing results in numbers only, sorted by category.
- A report showing the results in a graphical form; But this type of report is only available if you are using Filemaker Pro or Filemaker Go.
- A report showing a list of clients sorted by category.
- An "Excel" spreadsheet report;

If you choose to export the results to an Excel spreadsheet, you must first specify the version of your Microsoft Excel software.



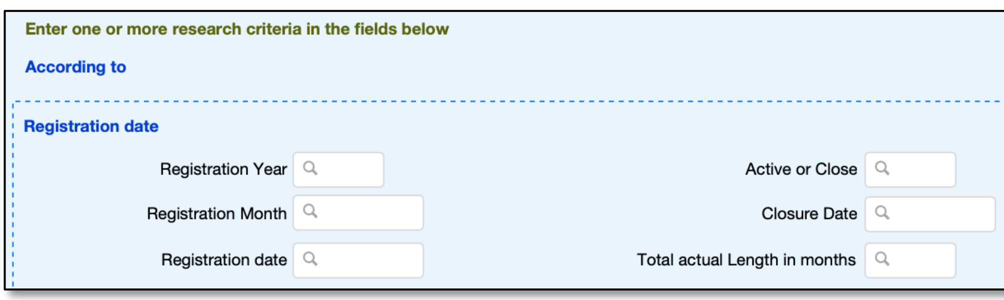
You can create a profile of your clientele by reporting according to certain characteristics or according to diagnoses.

There are only 10 pre-defined reporting features in addition to 12 predefined diagnostic reports. All these reports can be printed in a report format.

If you want to use other characteristics of the clienteles, or to obtain an overview combining several characteristics, like sex and age of the customer, then you must use another tool, also present, which is called "Customized search by criteria »

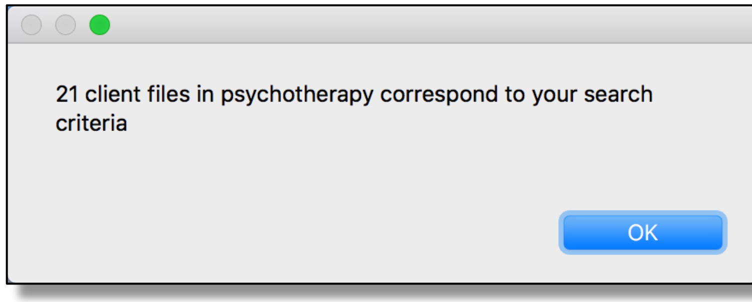
By clicking on the title or the icon, you have access to an interface presenting the different data entered on your clients.

The detailed search interface contains 48 different criteria.

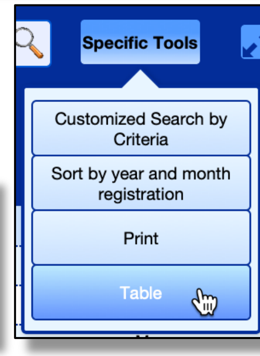


After choosing your criteria, after clicking on "Continue" a message will notify you of the total of files corresponding to the chosen criteria.

Then the list of clients is displayed.



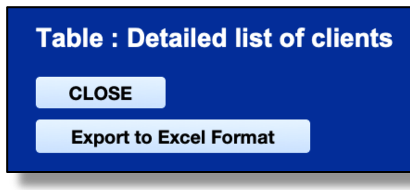
As mentioned, the results will not be presented as numerical aggregates (such as quantity for such criterion) as other reports, but in the form of a list of clients in the "Detailed list of patients in psychotherapy" interface.



However, you can transform the list into an Excel table by using the following tools:

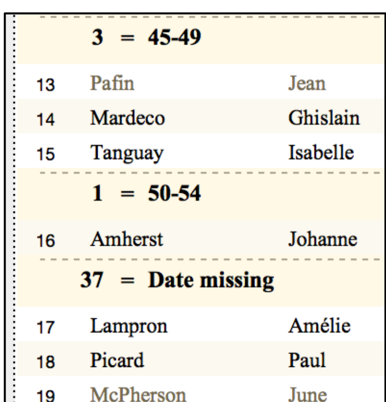
First, in the detailed client list interface, you use the "Table" tool, located in the "Specific Tools" drop-down menu.

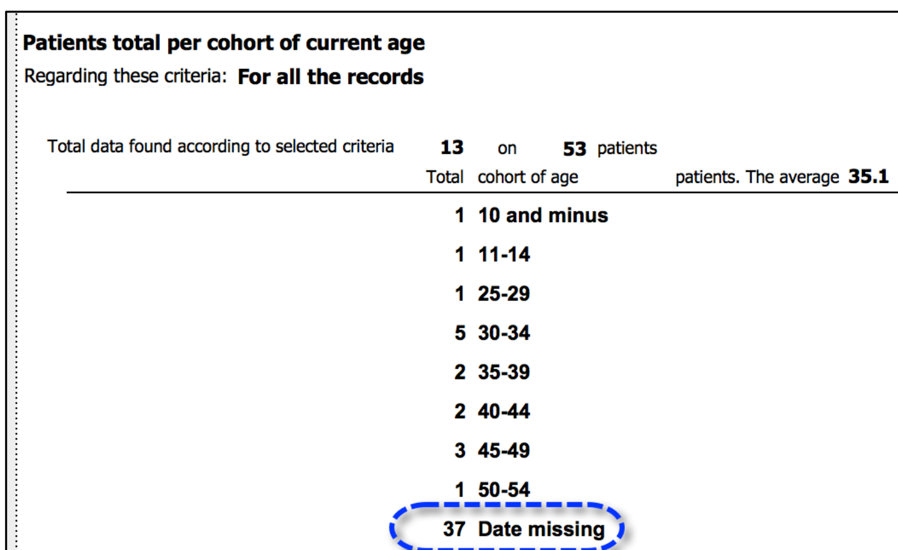
Once in the "Table" interface, use the "Export to Excel Format" tool.



Missing Data

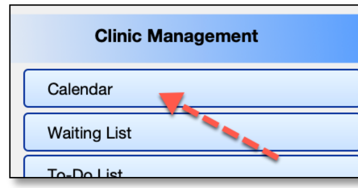
When you generate an aggregate or client list statistical report, if you did not enter the information you were looking for for each client, the number of records with the missing data will be displayed in some reports.





14. Using the Calendar

14.1 Launching



The calendar is displayed in a separate window from the main window, named "Calendar", which allows you to view two contents simultaneously.

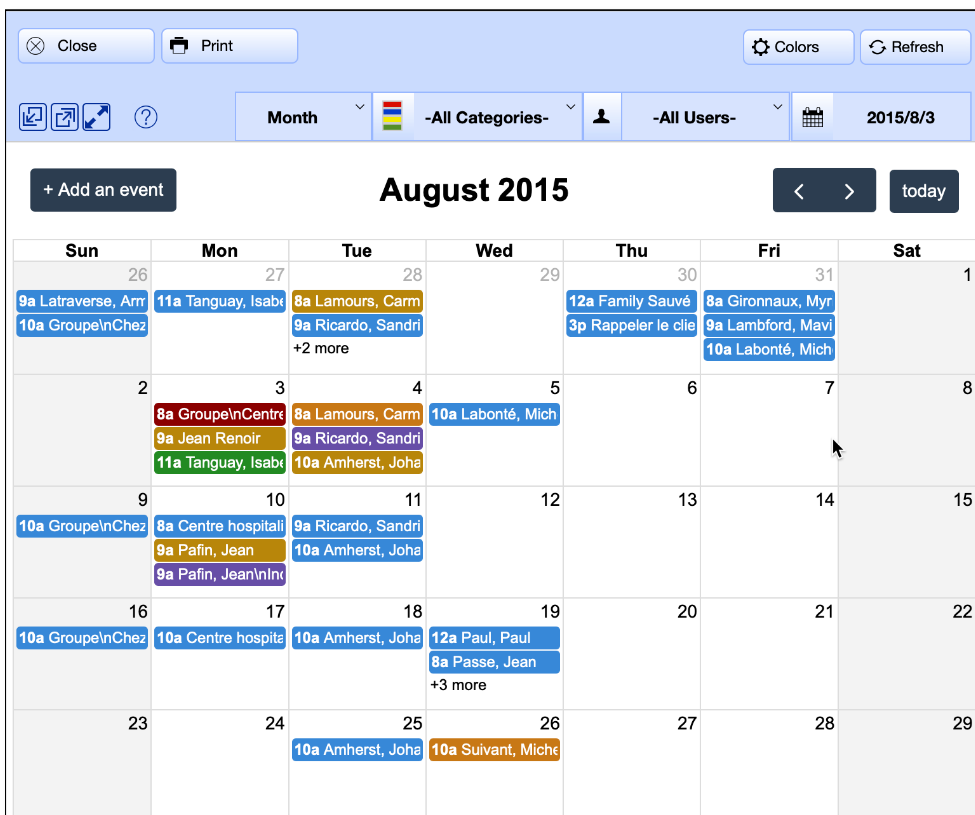
To display the agenda, there is a button in the Menu section :

And an icon in the other sections:

14.2 The display options

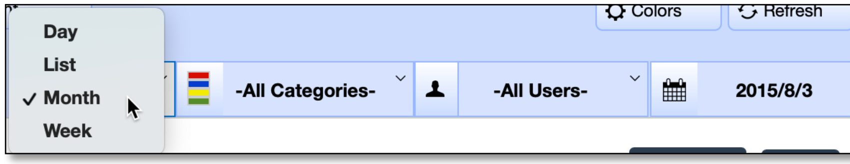
In the header of the agenda, there are four buttons allowing you to choose the display by period, by colors, by user, by date.

Here is how the display looks by month. The box corresponding to the current date is in "light yellow".

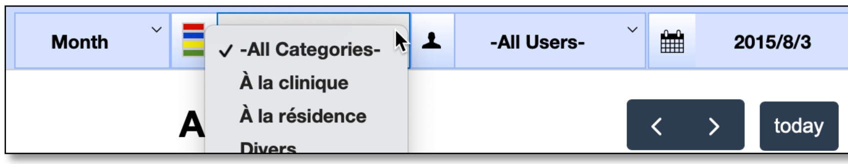


The buttons for a selective display

The first button allows you to display a period (month, week, day) or a list of all appointments

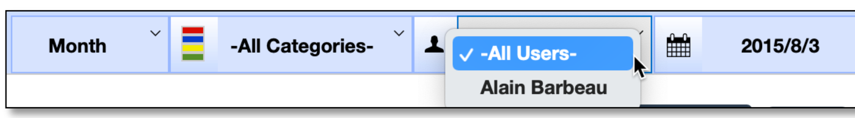


The second button allows you to display all the appointments or only those corresponding to a particular color. The colors are listed by the meaning that has been assigned to them.

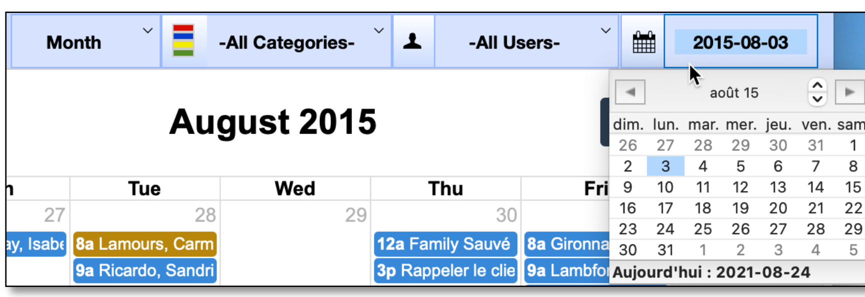


The third allows you to display all the appointments or only those corresponding to a specific user. If you use BaseDPsy in Solo this tool is absent. But if you use BaseDPsy with the option "Multi-users", all the users having an access to BaseDPsy will be present in the list. And by selecting a name, only the appointments of this user will be displayed.

Moreover, if your access is limited to your files, only your name will be present and only your appointments will be available for display in multi-user mode, thus respecting the confidentiality criteria.



The fourth button displays a specific date. Click on the date to display a drop-down calendar, then click on the date of your choice



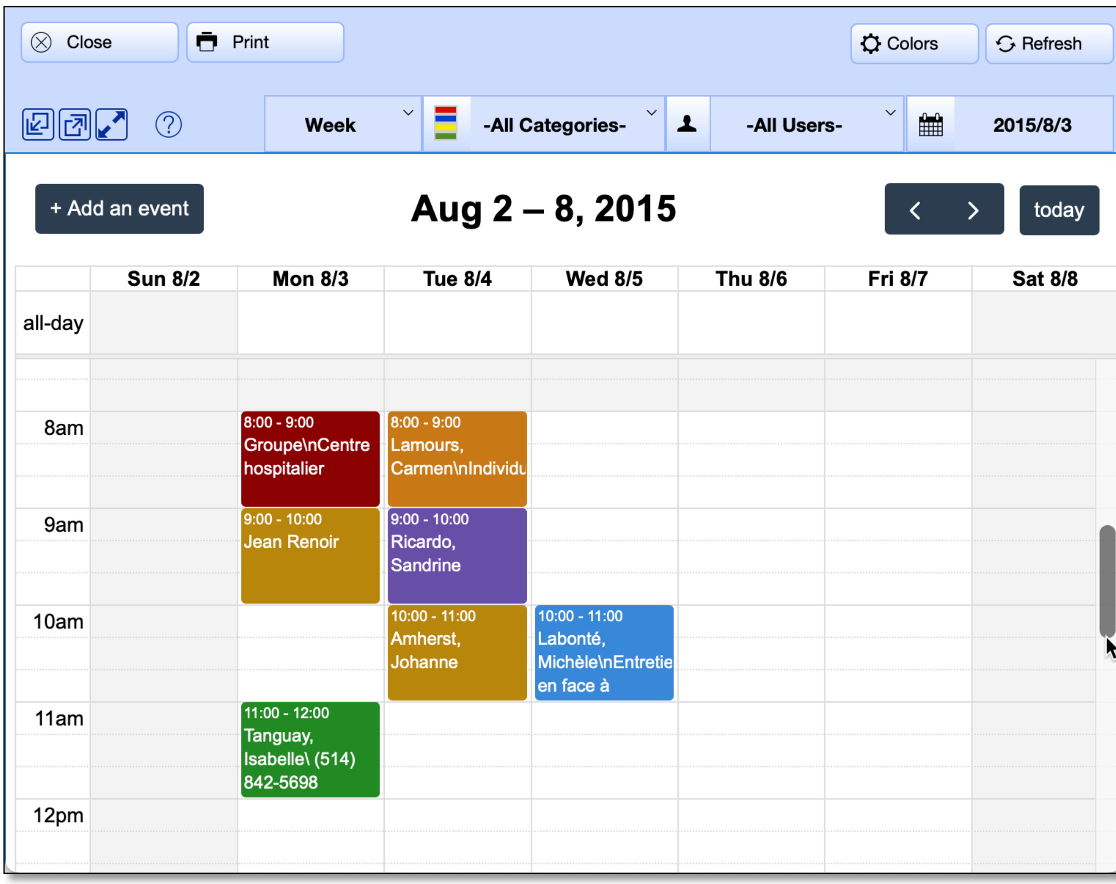
When you click the calendar display button from the Notes section, the date displayed in the calendar will automatically be changed to the session date displayed in the Notes section. You will have the same adjustment to the calendar date from the meeting date (Group section) or the activity date (Institution section).

Move between dates:

This tool allows you to display the previous or next date; or the previous or next month, as well as the week.

This tool allows you to display the current date. By clicking on the "Today" button, the day, week or month containing the current date will be displayed.

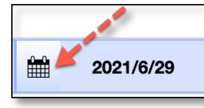
Display by week :

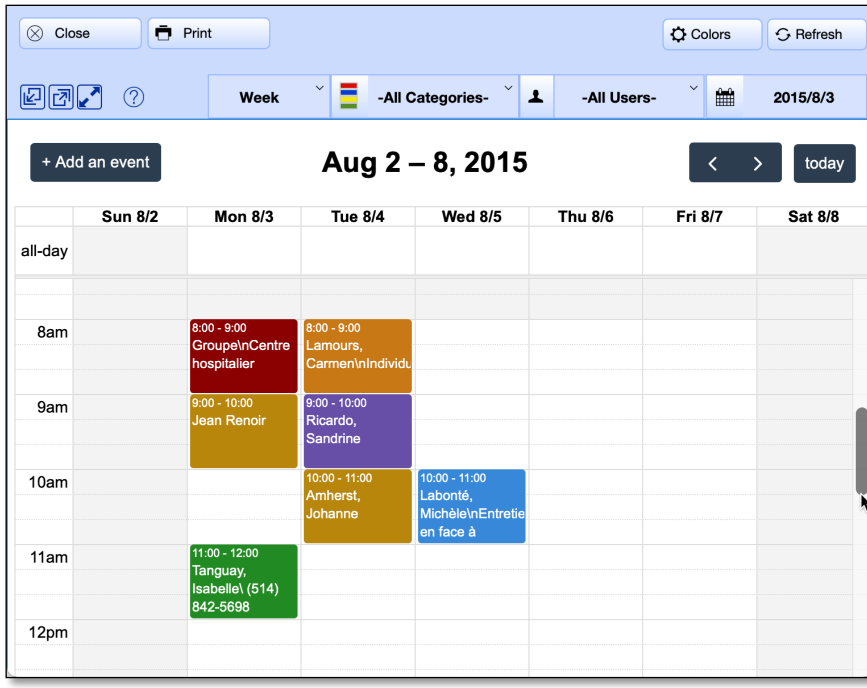


To view the hidden hours, click in the window to reveal the sliding bar. If your screen allows it, you can also enlarge the window to display more hours simultaneously.

Display one day at a time:

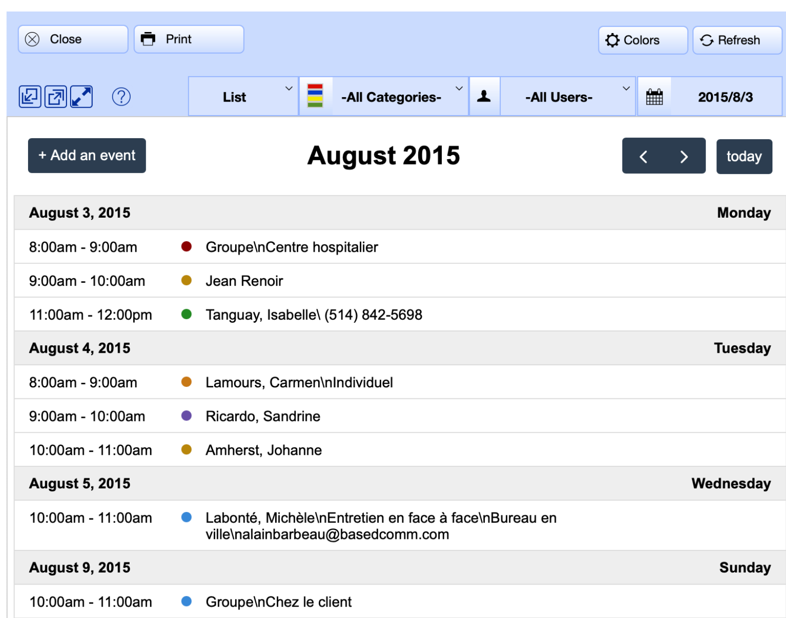
First choose the date in the button for that purpose, then display it by "Day". To display the hidden times, you can either use the sliding bar on the right of the window, or enlarge the window, if your screen allows it.





Display of the list of appointments :

All appointments are displayed sorted by date of the same month.



Default view

You can choose the default display in the "Options" section of BaseDPsy under the tabs: "General/Open".

14.3 Add an appointent

Automatic addition of appointments

BaseDPsy is a record keeping software and the main activity of its users is to write follow-up notes.

It is therefore desirable that when you create a follow-up note in BaseDPsy, you do not have to create an equivalent appointment in the agenda.

Consequently,
In the Notes section, each time you create a new session, an equivalent appointment will be added in the agenda.

In the Group section, each time you add a new meeting, an equivalent appointment will be added to the agenda.

In the Institution section, each time you add a new activity, an equivalent appointment will be added to the agenda.

Automatic adjustment of appointments in the calendar from other sections

In the Notes, Group Meetings, Activities sections, the appointment in the calendar will be updated (modified, adjusted) each time you modify any of the following items:

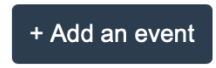
- Start date
- End date
- Start time
- The end time
- The choice of color

The automatic adjustment of appointments in the calendar does not apply (does not work) to all appointments imported from the old BaseDPsy calendar.

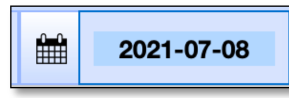
14.3.1 Adding an appointment directly in the calendar

Tools to create an appointment

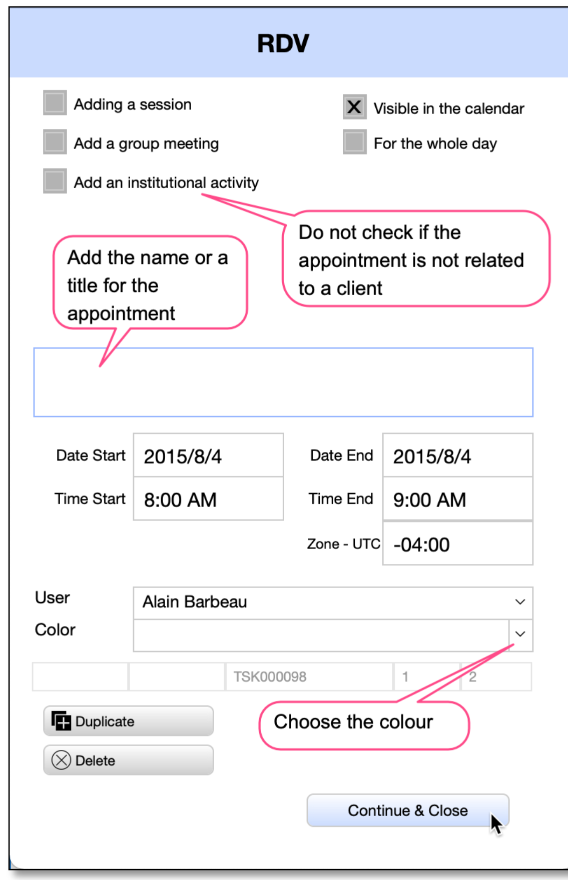
As soon as you click on the "Add an appointment" tool, the appointment is created, all that remains is to define its title and modify the dates and times of the appointment.



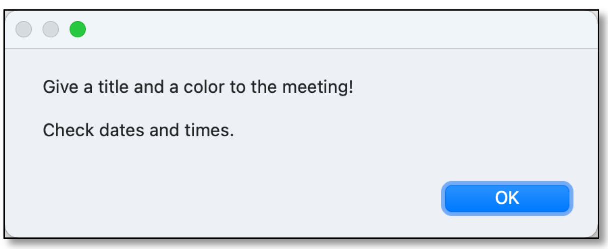
Each time you use the "Add an appointment" tool, the date defined in the default date tool window is automatically added. It is therefore preferable to define the default date before adding an appointment.



If after opening the RVD window, you don't want to add any more appointments, you have to use the "Delete" tool at the bottom of the window.



By clicking on the "Add an appointment" tool, a message reminding you of the specific elements of each appointment is displayed, followed by a temporary window to enter the content of the appointment.



Let's say you want to set up a dinner date with a friend in your calendar. All you have to do is write his name in the title space or even the name of the restaurant and adjust the dates and times of the appointment.

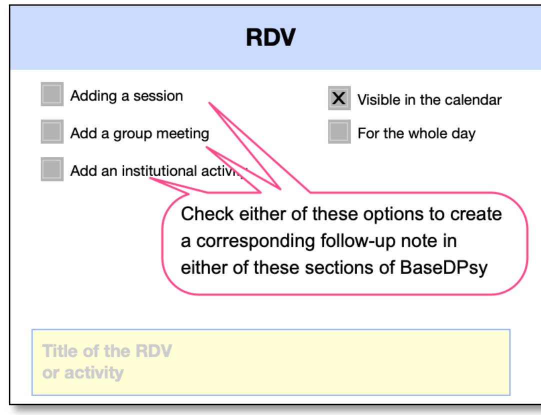
Then you click "Continue & Close".

Choosing the right time is easier with this new calendar, because you can move the appointment window to the side of the calendar window and continue to move around (change the calendar date) in the calendar window and find the best time for the new appointment.

Creating an appointment and a follow-up note at the same time

As said before, if you create a follow-up note in one of the other sections of BaseDPsy, the appointment is automatically created in the agenda.

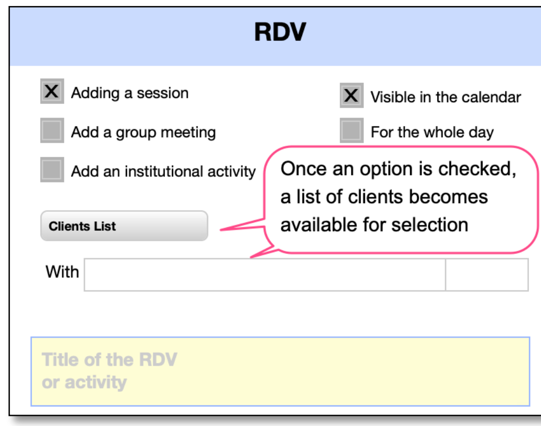
However, if when creating an appointment from the agenda, you want to add either a corresponding session in the Notes section, or a group meeting or institutional activity, we have added tools in the appointment interface to make this possible.



1. Check the appropriate section
   By checking one of these options, other steps and tools are added

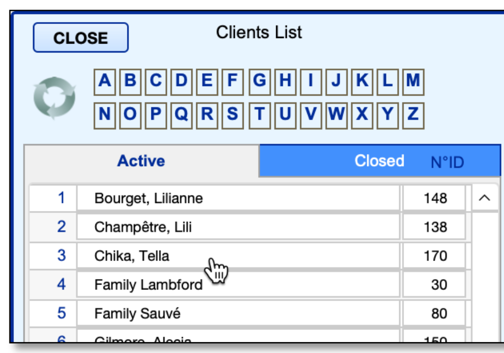
   First of all click the tool to choose the client:

   Regardless of the option chosen (session, meeting, activity) the client list tool appears and contains all clients.



2. Choose the client

   Click on the tool to display the list of clients.
   In the list, click on the name of the client, this will add his name in the two sections "With" and "Appointment title".



   In the "Appointment title" field containing the client's name, you can add details, in addition to the name or in replacement of the name.

3. Adjust the dates and times of the appointment
   Do not forget to define a color, otherwise the default color (blue) will be added.

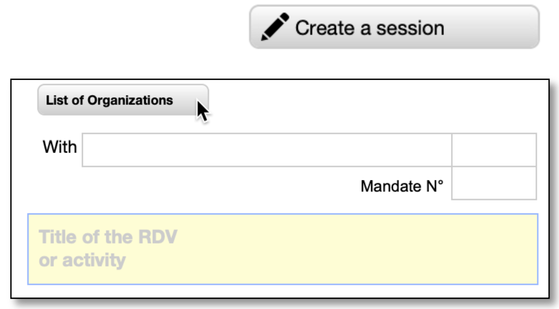
4. Click on the corresponding tool at the bottom of the window

   In case you have checked "Add a corresponding session", the tool will be named "Create a session".

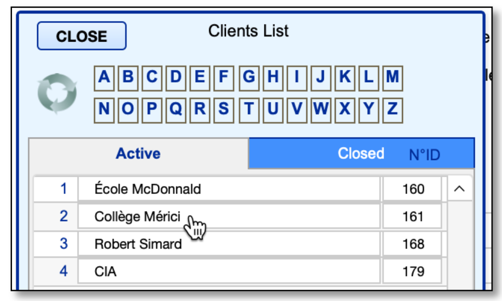
   By clicking on the tool, you will create a follow-up note and an appointment simultaneously, and the appointment window will close.

Special features for creating an institutional activity from the agenda

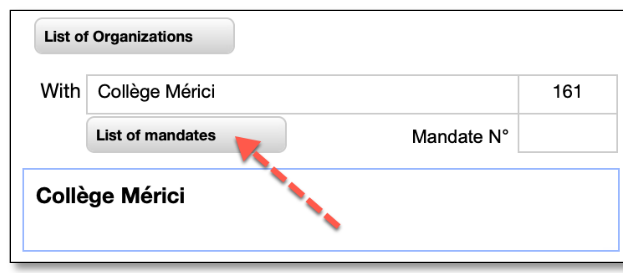
Check "Add an institutional activity" then click on "List of organizations" then choose the name of the organization and click on it.



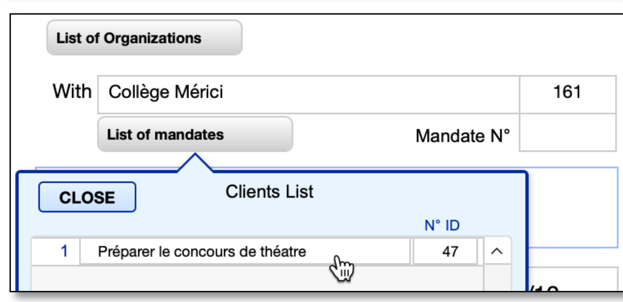
Since institutional activities are linked to both an organization name and a mandate number, the mandate number must be defined in the window for creating a new appointment



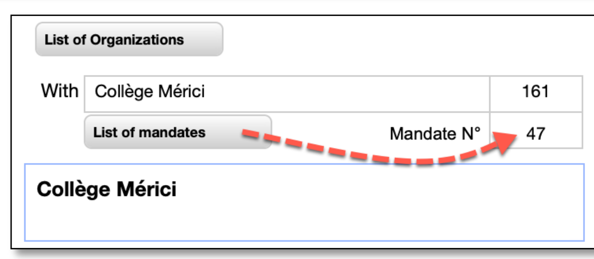
When the number of the organisation is added, a new tool is displayed.



You must click on "List of mandates" and then click on the title of the mandate concerned.

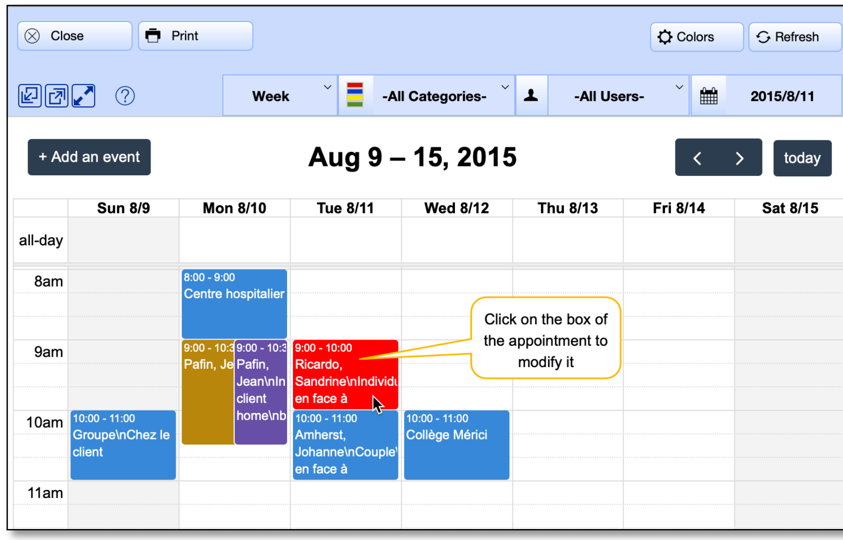


This action will define the mandate by its unique identification number (ID number) which is necessary in the definition of the activity.

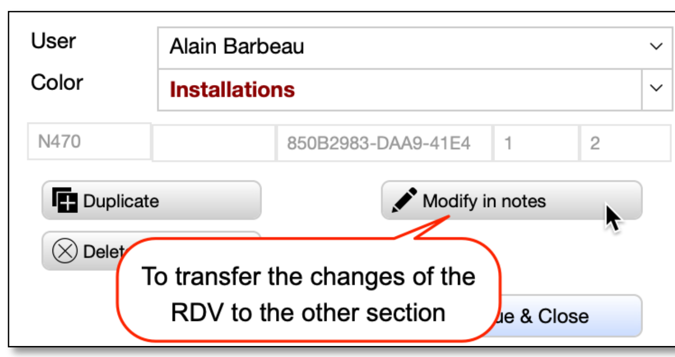


Modify an appointment from the calendar

From the calendar window, you can edit any appointment. Just click on the box of the appointment, which will display an additional window containing the details of the appointment.



If the appointment corresponds to a session (Notes section) or a group meeting or an institutional activity, another tool will be present. Once you have made your changes to the dates or times or color, you will need to click on the tool present to transfer these changes to the follow-up note.

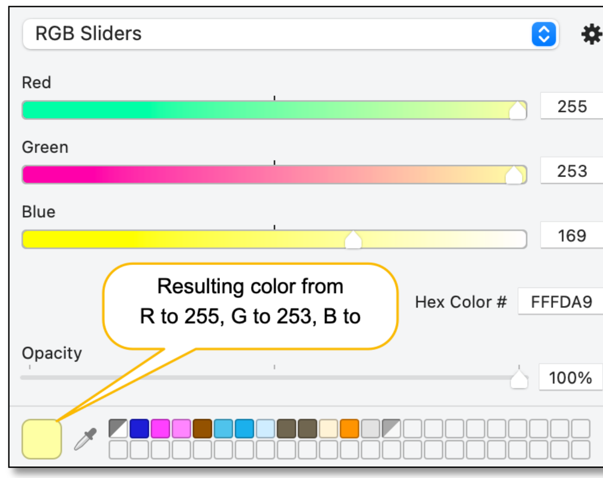


14.4 Edit the colors of the appointments

The colors in an agenda allow you to quickly see a category of appointments based on its color.

It is therefore necessary to give a particular meaning to each color. For example, different colors would allow you to quickly identify which meetings (appointments) will be made via videoconferencing and which will be made face to face.

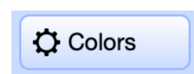
The intensity of each color is defined by a number between 0 and 255. The number 255 corresponds to the maximum of the color, while the 0 corresponds to its absence. And each color is a mixture or not of the following three colors: Red, Green, Blue; usually identified by the letters R.G.B.



The tool shown here is not available in the agenda, but it is available as a utility in MacOS computers under the name "Colors".

With Windows, you can open the "Paint" application and then display "Brushes" and click on the color to get a tool to define it by RGB.

These tools are present here for information purposes, you don't really need them to define a color.
In the agenda interface, click on "Colors" to display the list of available custom colors.



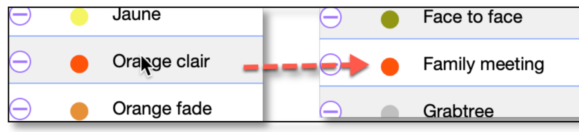
The tool available in the agenda contains a section to define the meaning given to the color and three sections to determine the intensity of each of the constituent colors.

Simply click on the "Add Color" tool to create a new color.

You can delete the ones you won't use.

You can use the existing default colors and you can change their names to give them the meaning you want. Click on the name to change it.

Here is an example of a modification.



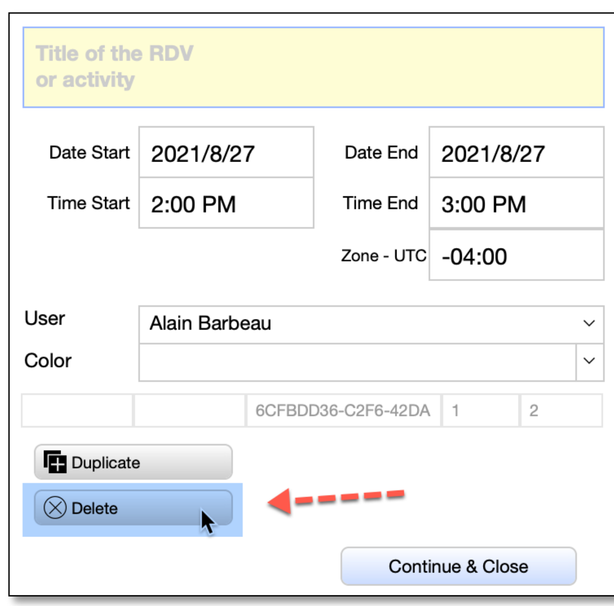
Click on the "X" at the top left of the window to close it.

14.5 Delete an appointment

Each time you use the tool: "Add an appointment" the appointment is automatically created and added to the calendar. But you may change your mind after clicking on the tool and this addition is no longer necessary.

To delete it, click on the tool at the bottom of the appointment definition window.

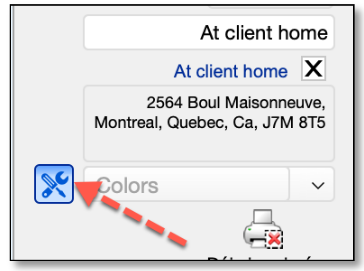
If you delete an appointment that matches a note in another section, only the appointment in the agenda is deleted. To delete both entries, the one in the agenda and the one in another section of BaseDPsy, for example in the "Notes (follow-up)" section. We suggest that you display the two windows side by side, display the same appointment in each section and then delete them.



Missing appointment

If you have deleted an appointment by mistake in the agenda corresponding to a session in the "Notes (follow-up)" section:

Display the affected note in the "Notes" section and click on the tool next to the item to set the color. This tool is only visible if there is no appointment in the Calendar corresponding to this note.



Moreover, when the appointment does not exist in the agenda, the color choice field is also empty.

On the other hand, this tool, which is normally hidden if an appointment has been created in the agenda, will be visible for all appointments imported from the old BaseDPsy calendar; therefore, it should not be used for these old appointments, otherwise you will create duplicates in the agenda.

The same tool is present in the Institutional Activities and Group Meetings sections.

Finance Management

15. Services Invoicing

15.1 General points on invoicing

It is important to remember that almost all financial reports, unless otherwise noted, are made based on the invoice date.

Accordingly, it is desirable that you enter a billing date identical to the service date;
That will ensure you

a) *for the annual balance, that all of your billing dates are in the same financial year as the date of service;*
b) *the billing date will be the same financial year that the billing date of service.*

Regardless of the service you offer in BaseDPsy, all billing will be done in first two simple steps.

The first is to enter invoice data, that is to say identify the billed service, billing date, the fees charged, invoiced and paid.

The second is to identify who is the person to invoice.

A third step is added if:

- Service payment is deferred, that is to say, it is not done at the same time as the billing. For example, you charge each session on the same day of the session is held, but you have an agreement with your client so that he pays monthly.
- You charge the service to an external debtor, the payment will be automatically deferred because sending an invoice to the debtor is in another stage, as well as receiving the payment from the debtor.
- The cost of service is shared between two or more payers, so you must make several bills for the same service. For example, the customer pays 50% of the session and an external debtor pays the other 50%.

However, some features are present in the billing charged by the service. Despite the constant presence of two or three steps, there are different features between the billing of service psychotherapy, the billing of group therapy, the billing of services to an organization, or billing a report.

Before seeing the billing service, we will briefly explain the ability to insert a signature in bills BaseDPsy.

To send an invoice or receipt by email, see "7.4 Sending a document by e-mail," p. 113.

15.2 Use an Electronic Signature

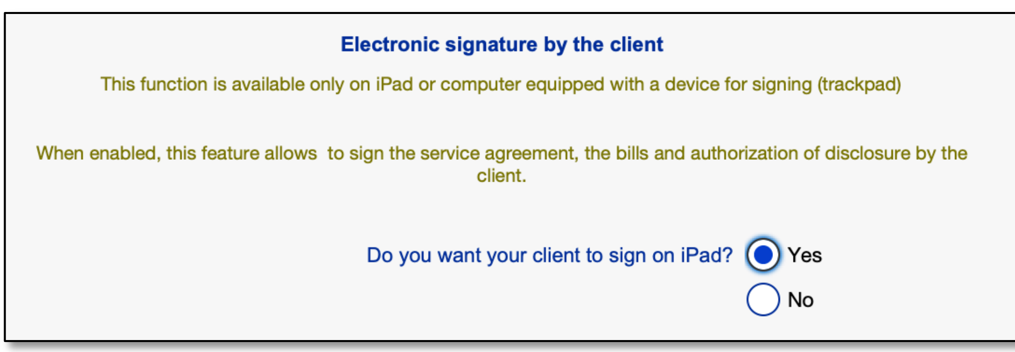
In BaseDPsy, it is possible to sign electronically all bills, statements and receipts you give or mail to the client. But it is also possible, if you use an iPad to let sign the invoice by the client, thereby confirming its agreement with the billed service.

15.2.1 Client Signature

If you use an iPad, as it allows a person to sign directly on the interface, you will be able to sign your patient at three different places in BaseDPsy:

1. The service agreement;
2. The disclosure authorization form;
3. The invoice for each service.

But to take advantage of this opportunity, you must activate it by answering "Yes" to the question "Do you want your client to sign on iPad". The question is in the "Options " section, click the "Printing / Contents / Electronic Signature" tab.



If you choose “No” the field space and the reference to the client's signature will be invisible.

If you choose yes, the place and the word will be shown on the invoice as follows: just above your signature, vis-à-vis the total charged.

There is also the service agreement you may have signed by the client on iPad, in the "Files Request" section under the "Agreement / Main objectives ...".

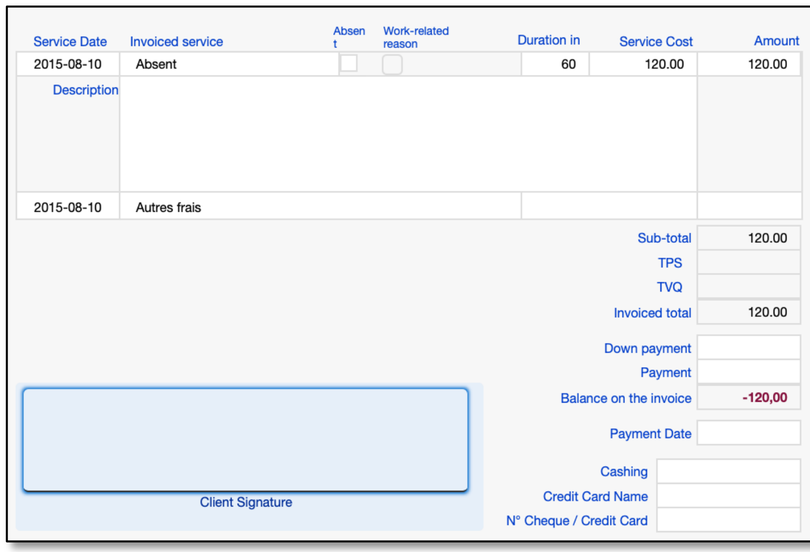
15.2.2 Inserting your own electronic signature

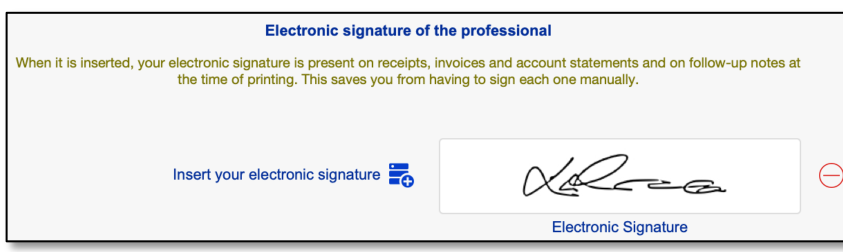
You must first create your electronic signature. If you are using an iPad, this is very simple, you just have to sign in the box for insertion.

Otherwise, you must create an image of your signature. If you use a Mac computer, you can use the "Preview" software. Display preferences, and use the "Signature" tab, instructions are there.

Or, write your signature on paper, and with a digitizing device (scanner), save your signature in a file in picture format (.jpg, .bmp, .png, etc.).

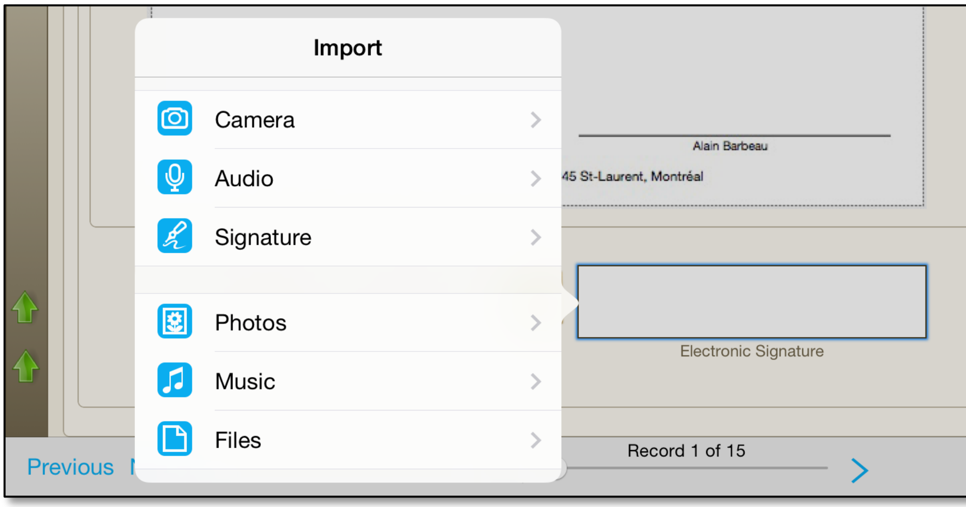
Once your signature available in picture format, you display the "Options" section, and under "Electronic Signature" tab is the field space to insert your signature.





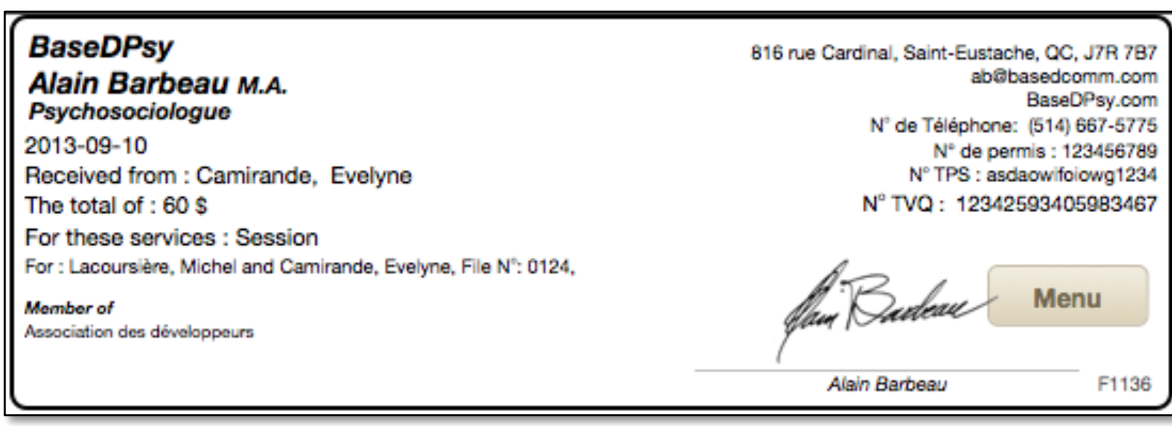
If your signature is a file, simply click on the title or the icon (button) to insert or click in the blank space with the right mouse button.

If you have an iPad, click in space or on the button to insert a signature. The iPad displays the choice to insert a file or to sign directly.



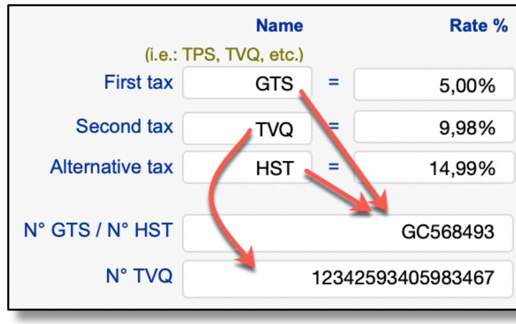
In the case of a sharing between a computer and an iPad, it should be noted, however, that the signature inserted from the computer will be stored only in the computer and that the singature inserted into the iPad will be saved only by the iPad. So, eventually, you will have two different electronic signatures on iPad and computer.

Your signature will then be displayed on your receipts, invoices and statement.



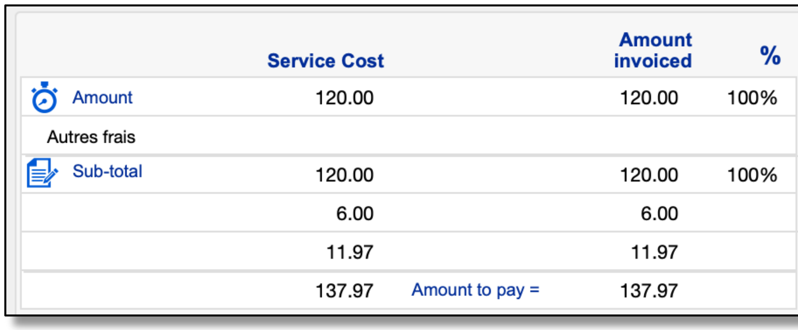
15.3 Service taxing

If you collect taxes for your services, you should indicate this by ticking a choice in the "Options" section under the "Finance" tab.
You must also enter the names of taxes and the percentage.

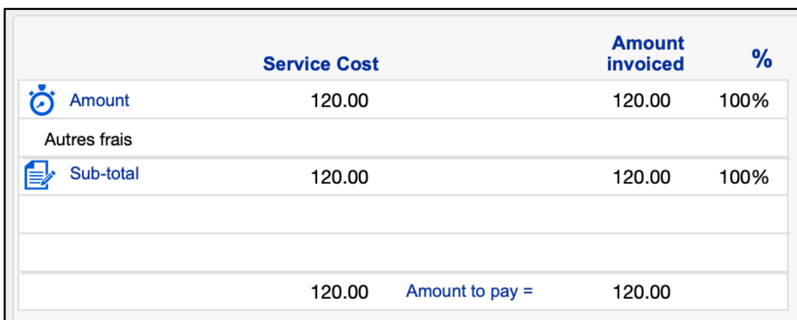


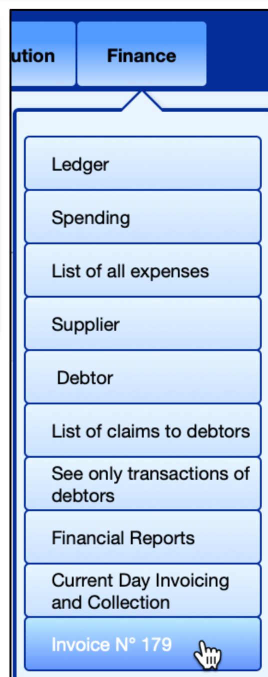
When you select "Yes" in this interface, the cost of taxes is automatically displayed under the "Invoicing" tab of your services.

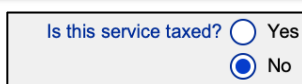
If after charging the fees for your services for a while, you stop taxing. Then, you check "No" and automatically the cost of the levy will cease to appear under the "Invoicing" tab of your services, even for services charged before changing the choice.



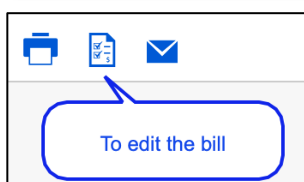
But the amount of taxes that you have taken before this change will continue to be present in the general ledger and accounting of your previous finances will not be affected by this change.







The choice is also available under the "Invoicing" tab so you can avoid going back and forth between the "Options" section and the "Notes" section,

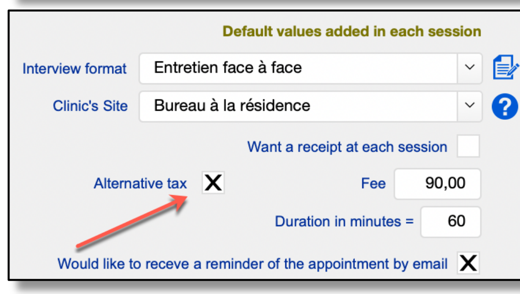


If you have forgotten to tax before saving in the General Ledger, then you must display the invoice and modify the information in the invoice window.
To display the invoice, you must go to the tab "List of invoices" and click on the icon displaying a magnifying glass. or you click on the "Finance" header menu whose last submenu contains the link to the invoice.

15.3.1 Alternative Tax

In version 10 of BaseDPsy, an alternative tax has been introduced to facilitate the work of professionals who receive clients subject to different tax systems, such as those from Quebec working near the borders of the Canadian provinces of New Brunswick and Ontario.

To be used, you must
- Enter the contents of the headings in the Options section (name and rate)
- Check your application in the "registration" section of the client file.



When used, the alternative tax replaces the No. 1 or first tax. For example, in Canada, it will be called HST and will be collected in place of the GST.

So, in your financial reports, it will be inserted and compiled in the first tax column.

In the Notes section, when it is used, the second tax is no longer calculated, and the alternative tax calculation replaces the first tax.

Taxation of a session with the first (5%) and second tax (9.975%):

	Service Cost		Amount invoiced	%
Amount	90.00		90.00	100%
Autres frais				
Sub-total	90.00		90.00	100%
GTS	4.50		4.50	
TVQ	8.98		8.98	
	103.48	Amount to pay =	103.48	

Taxation of a session with the alternative tax at the rate of 14.99%.

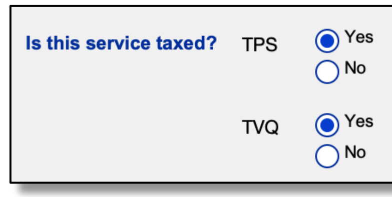
	Service Cost		Amount invoiced	%
Amount	90.00		90.00	100%
Autres frais				
Sub-total	90.00		90.00	100%
HST	13.49		13.49	
	103.49	Amount to pay =	103.49	

15.3.2 Invoicing of organisational activities

Since institutional or organizational activities can be very different from clinical activities and obeying a different regulation, we have added two options.

Taxes independent of each other in Institutional section.

You can in the billing of activities charge one or the other of the taxes.



It happens in Canada that certain activities are taxable at one level of government without being taxed in the other, or that activities are taxed in one province without being taxed in another

Non-taxable services

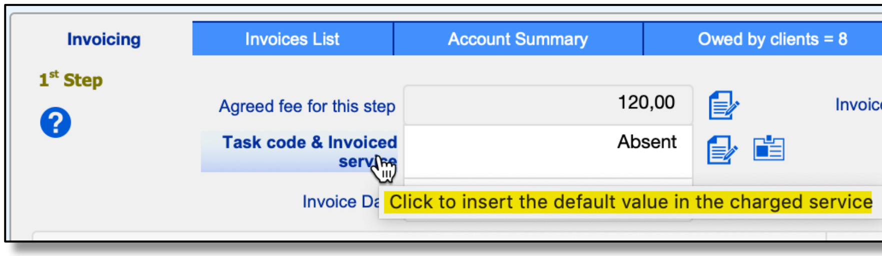
In instituional section, we have added a field that allows you to charge non-taxable services, such as travel expenses.
The non-taxable item is included under "Other Costs".

The amount added will therefore not be added to the amount on which the taxes apply. In your financial reports, it will also be added to "Other Costs".

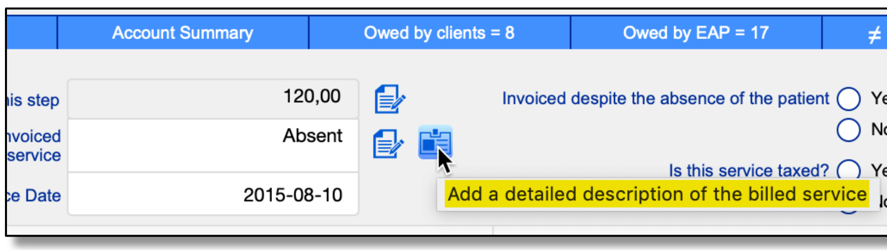
	Service Cost		Amount invoiced	%
Amount	100.00		100.00	
Autres frais				
Other not taxed	100.00		100.00	
Sub-total	200.00		200.00	100%
	5.00		5.00	
	9.98		9.98	
	214.98	Amount to pay =	214.98	

15.3.3 Detailed description of the billed service

When you bill a service, there is a brief description that is added to the invoice under the "Task Code and Invoiced Service" label. You can change the drop-down menu included in the field and you can also set a default value that will be inserted by clicking on the field label.

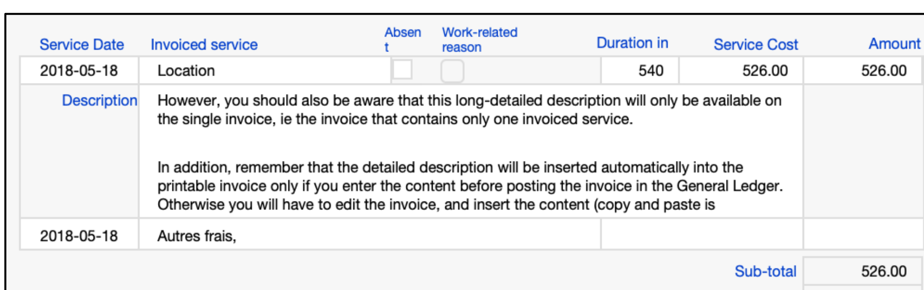


You can also insert a long-detailed description by clicking on a tool juxtaposed with the heading. This tool will be particularly useful in the section on notes on institutional activities. This is where you are most likely to need a description of the different elements of the bill.



However, you should also be aware that this long-detailed description will only be available on the single invoice, ie the invoice that contains only one invoiced service.

In addition, remember that the detailed description will be inserted automatically into the printable invoice only if you enter the content before posting the invoice in the General Ledger. Otherwise you will have to edit the invoice, and insert the content (copy and paste is accepted)



16. Psychotherapy's Invoicing

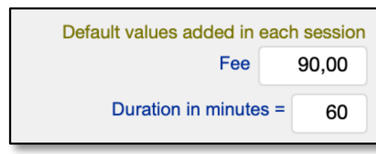
Invoicing method is similar for all types of customers:

- Psychotherapy;
- Group;
- Institutions.

Note that the explanations given below are valid for the following three interfaces on psychotherapies :

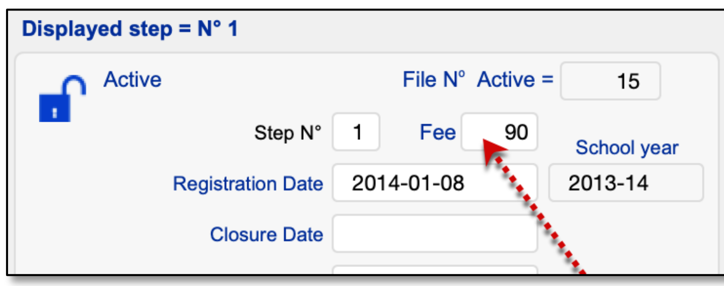
- Notes (Individual Therapy);
- Notes (Marital Therapy);
- Notes (Art-Therapy).

16.1 Set your professional default fees

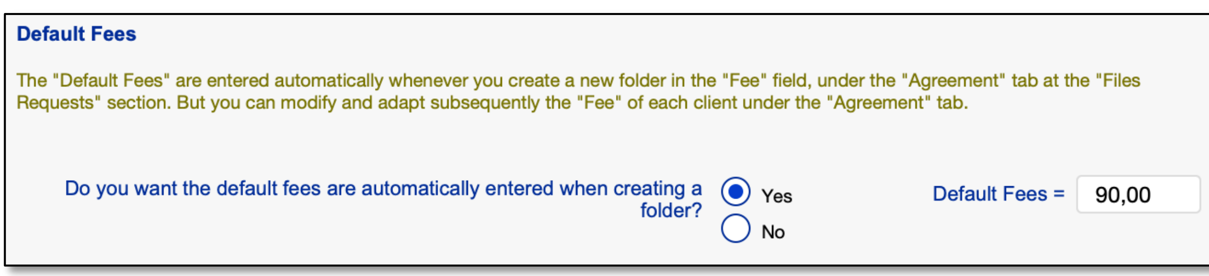


Whenever you create a file for psychotherapy, you have different options in the "Registrations" pane. One of these options is the fee agreed with the client for the current process (step). The field for the fee is also available under the "Steps" pane.

There is a great advantage to enter your fee in these fields: is that it will be introduced automatically under the "Invoicing" tab to each new session, what will save you time.



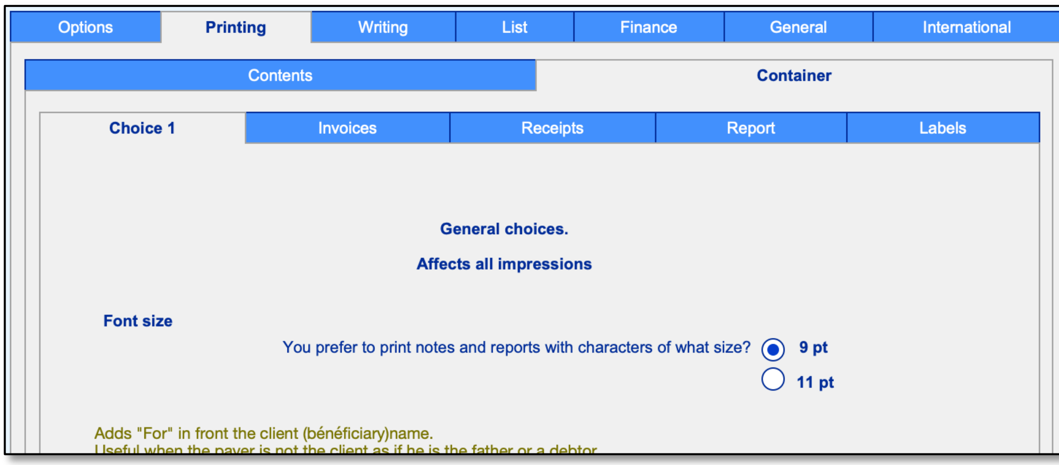
If your price is always the same from one client to another, you can also define a default fees in the "Options" section under the "Finance" tab, which will have the effect of automatically enter your rate at each new client file.



16.2 Customize your choice for invoice templates and receipts templates

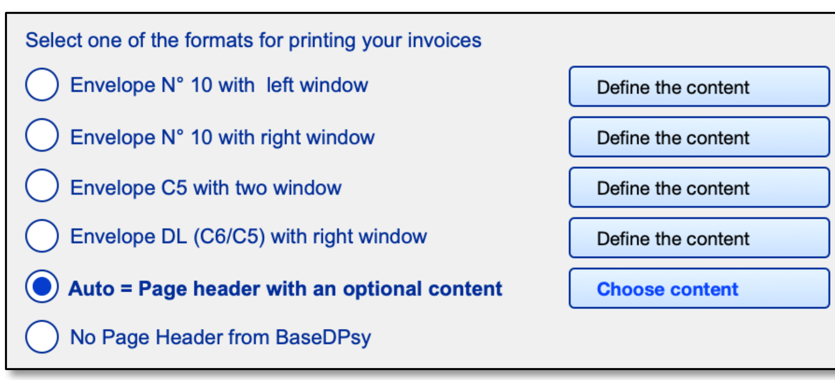
See the "Options" section.

The options under the tab "Print" were re-conceptualized and new options are now available. The new options for customizing invoices, receipts and reports.



16.2.1 Invoices Customizing

If you have your own pre-printed paper with your custom headers, you may not use the header formats available in BaseDPsy, using the "No Page Header from BaseDPsy" option. Otherwise, you have 5 invoice templates available.

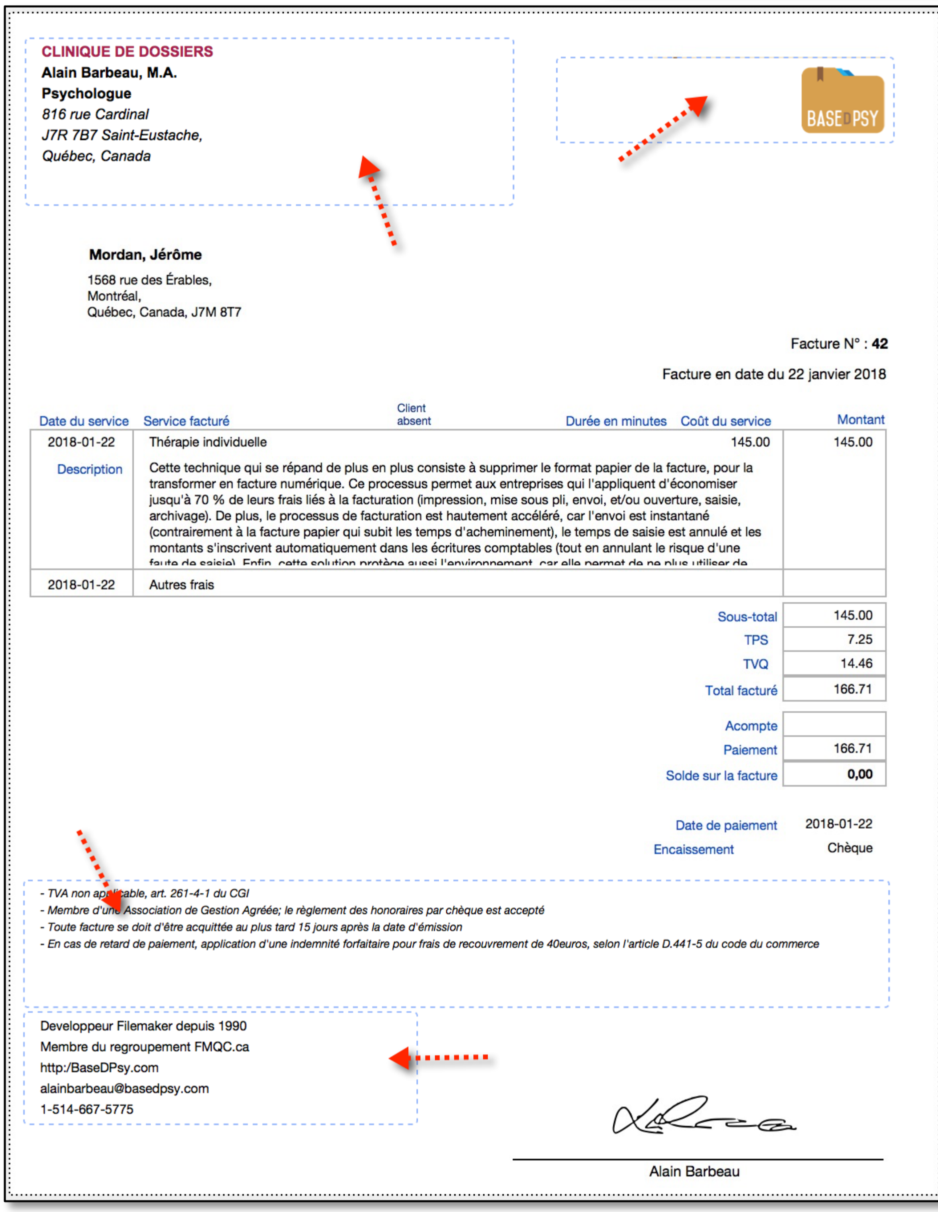


Two models use North American standards (US); or envelopes No. 10.

Two other models conform to European standards, ie a "C5" format envelope with a window for the sender and a window for the recipient; and another DL format envelope with a single window for the recipient.

The new design of headers allows you to do your own paper header in BaseDPsy because you can write what you want in the header and give it the desired style, change the size and font color.

Moreover the text of your header moves or has a larger space if you use a logo or not; it varies by model. Here is an example with the C5 model.



CLINIQUE DE DOSSIERS
Alain Barbeau, M.A.
Psychologue
816 rue Cardinal
J7R 7B7 Saint-Eustache,
Québec, Canada

Mordan, Jérôme
1568 rue des Érables,
Montréal,
Québec, Canada, J7M 8T7

Facture N° : **42**

Facture en date du 22 janvier 2018

Date du service	Service facturé	Client absent	Durée en minutes	Coût du service	Montant
2018-01-22	Thérapie individuelle			145.00	145.00
Description	Cette technique qui se répand de plus en plus consiste à supprimer le format papier de la facture, pour la transformer en facture numérique. Ce processus permet aux entreprises qui l'appliquent d'économiser jusqu'à 70 % de leurs frais liés à la facturation (impression, mise sous pli, envoi, et/ou ouverture, saisie, archivage). De plus, le processus de facturation est hautement accéléré, car l'envoi est instantané (contrairement à la facture papier qui subit les temps d'acheminement), le temps de saisie est annulé et les montants s'inscrivent automatiquement dans les écritures comptables (tout en annulant le risque d'une faute de saisie). Enfin, cette solution protège aussi l'environnement, car elle permet de ne plus utiliser de				
2018-01-22	Autres frais				

Sous-total	145.00
TPS	7.25
TVQ	14.46
Total facturé	166.71
Acompte	
Paiement	166.71
Solde sur la facture	**0,00**

Date de paiement 2018-01-22
Encaissement Chèque

- TVA non applicable, art. 261-4-1 du CGI
- Membre d'une Association de Gestion Agréée; le règlement des honoraires par chèque est accepté
- Toute facture se doit d'être acquittée au plus tard 15 jours après la date d'émission
- En cas de retard de paiement, application d'une indemnité forfaitaire pour frais de recouvrement de 40euros, selon l'article D.441-5 du code du commerce

Developpeur Filemaker depuis 1990
Membre du regroupement FMQC.ca
http:/BaseDPsy.com
alainbarbeau@basedpsy.com
1-514-667-5775

Alain Barbeau

This design also allows you to add text to the footer. The number of available spaces varies depending on the model. A footer allows you to write a generic text, valid for all invoices while a second space allows you to write a message on only the invoice or statement of account sent to the customer.

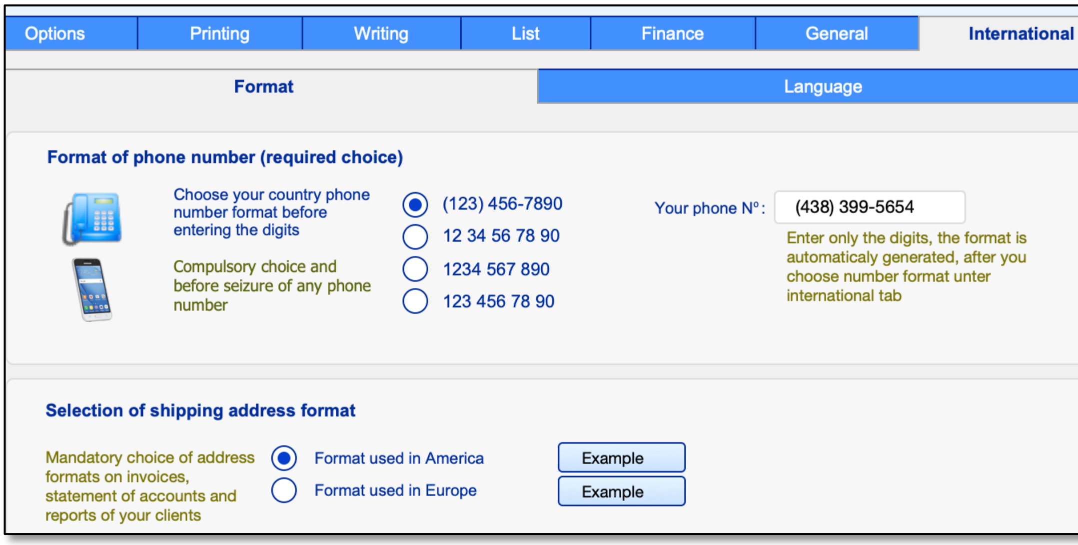
In each of the templates, the available spaces to enter the content of your choice is blue dotted.

The number and location of editable spaces changes depending on the invoice template you choose.

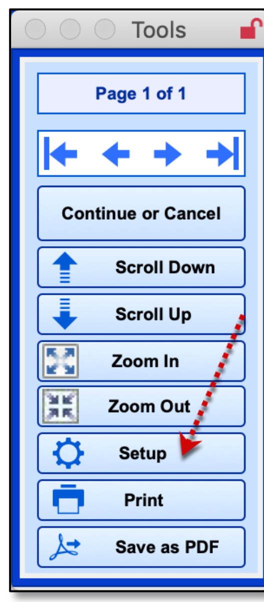
We suggest you try several models, print them, and see which one is best for you

The address of your customer or recipient can be adapted to North

American or European standards. Standards are available with examples into the "Example" button.



The paper size by defaults to "US Letter" for models "Auto" and No. 10, while default size is "A4" for models "C5" and "DL".



However, when you specify printing, you can change the paper size using the "Setup" tool in the tool window.

So you can use US Letter or A4 with all models of invoices or receipts.

The specific footer for an invoice can be changed by displaying the "Invoice" section from the list of bills the "Notes" section.

However, if you print an account statement or a monthly bill, it footer is displayed and editable when choosing services dates to include in the statement or in the monthly invoice.

16.2.2 Receipts Templates Customizing

Two modifiable received models have been added to the existing model, renamed itself "Third Auto".

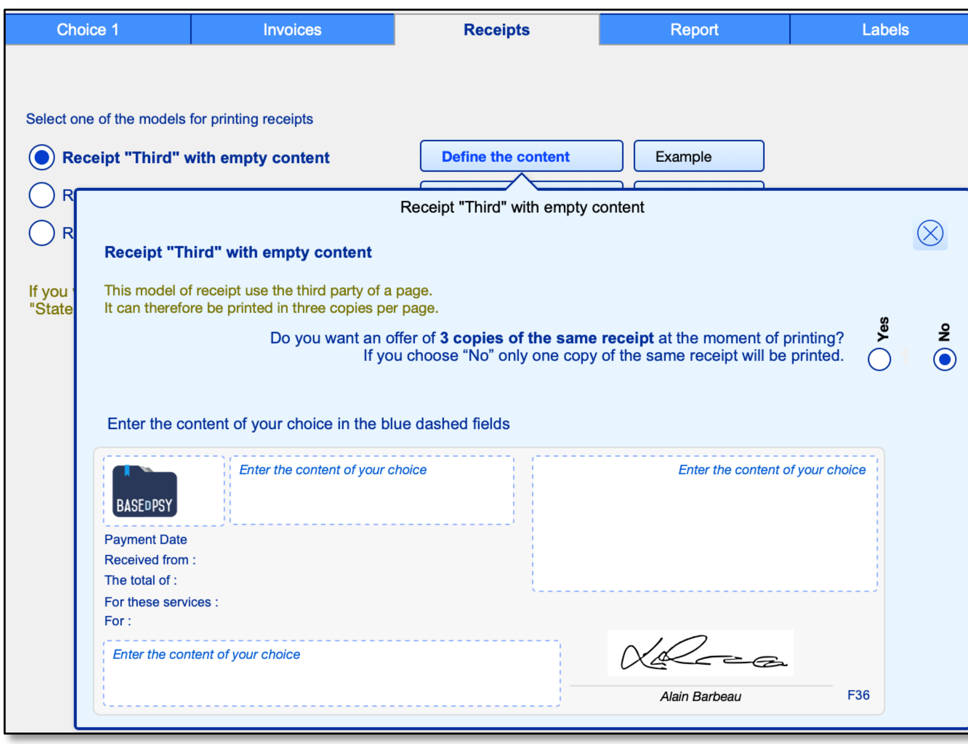
The model "Third Empty" takes its name from the fact that it takes the space of one third of a page and you can print three times the same receipt on the same sheet of paper.

The model "Half" also derives its name from the fact that it requires a half sheet of paper when printing. But you can print only one at a time.

The model "Third Empty" has text fields empty to insert the desired in the format of your choice.

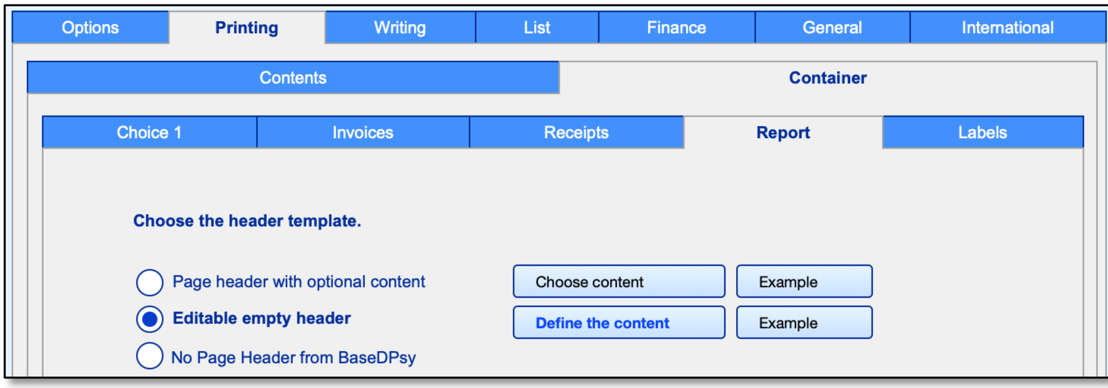
This is also the case of the model "Half". The same empty fields are present but more distant and larger.

An option allows you to display the service date and the location of the service on "Third » format of receipt, named: Third with optional content" (auto-fill) receipts.



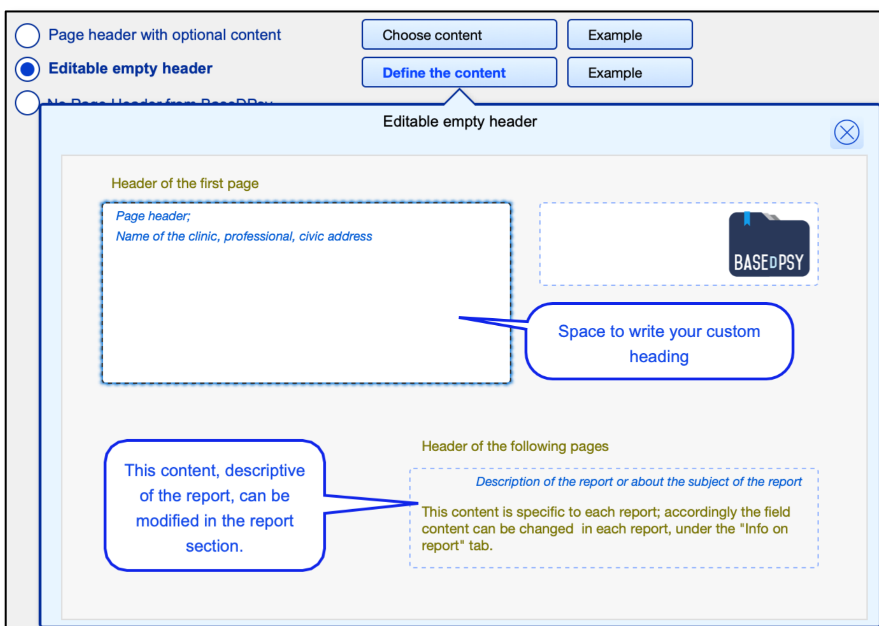
16.2.3 Reports Header Cusomizing

For the header of the reports on your services, there are three options: either a heading composed of information already entered in BaseDPsy, or an empty heading in which you compose the content; or empty space to use your own letterhead.



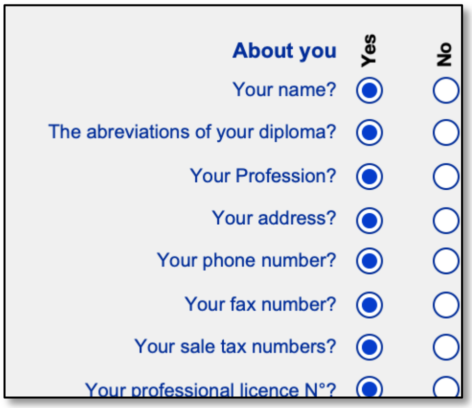
The Editable empty heading model follows the same principle as invoices and receipts: an empty section used for the header that identifies you, and another empty section used to describe the report itself and the client.

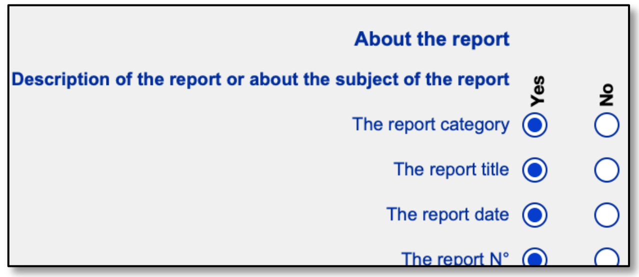
However, the field to identify the report is not available in the "Options" section, it is present in the "Info Report" tab and therefore its contents will be different for each report.

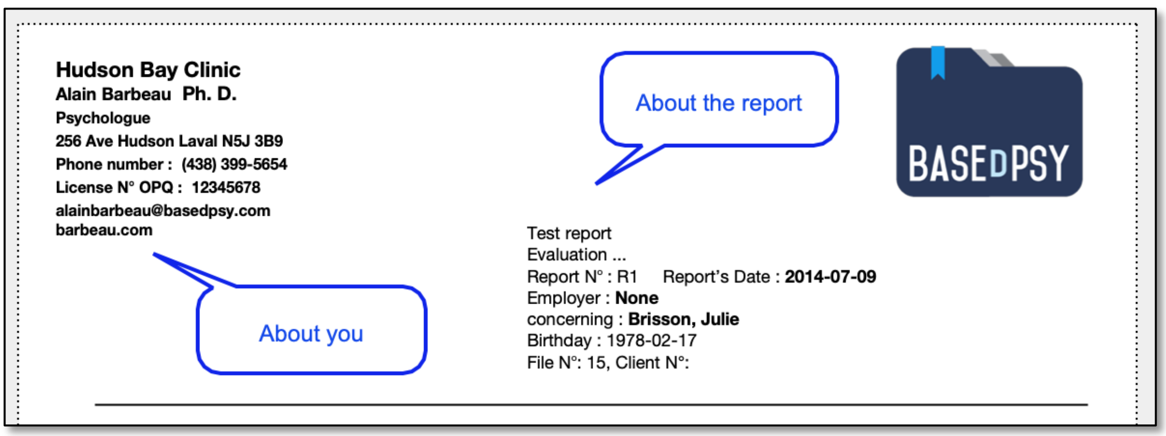


The content of the section describing your report is repeated on each page header, when your report has multiple pages.

The model "Auto" appears in each header, one for you and one for the report from your choices in optional content.



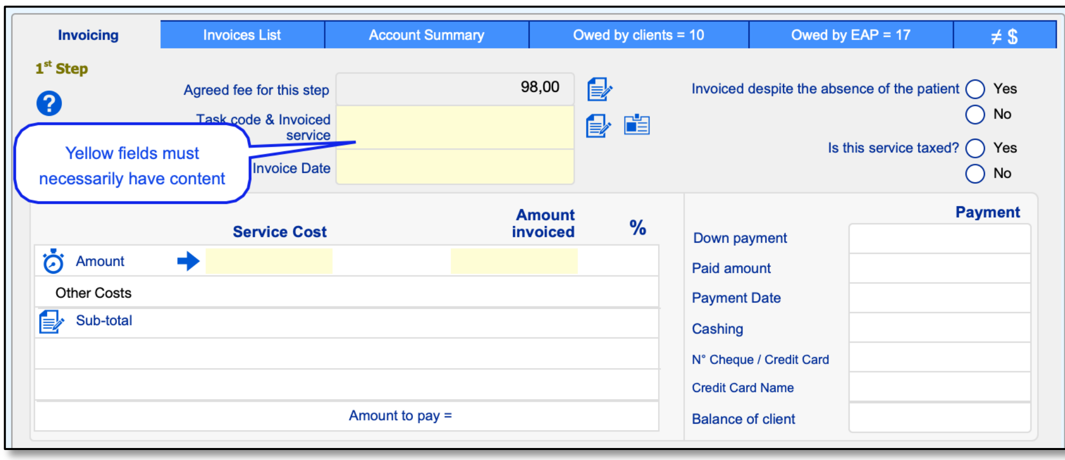




16.3 Making an Invoice / Bill the cost of the service

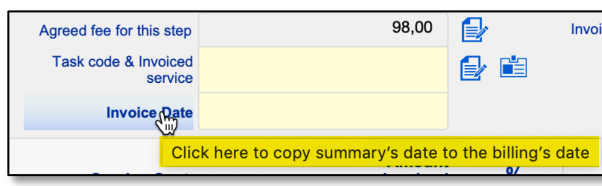
16.3.1 Billing the session manually

The creation of the invoice is done in the interface of note taking, whether for individual services, group meetings, or organizational activities.
Here is an overview of the "Notes" section, "Invoicing" section.



Fields in yellow must necessarily have content; the yellow disappears as soon as you have entered a content.

Several tools are present either in the form of buttons or hidden in the title of the field; these tools are designed to reduce the time required to complete billing.
For example, the titles "Invoice Date" and "Invoiced Service" hide tools for entering content with a single click.

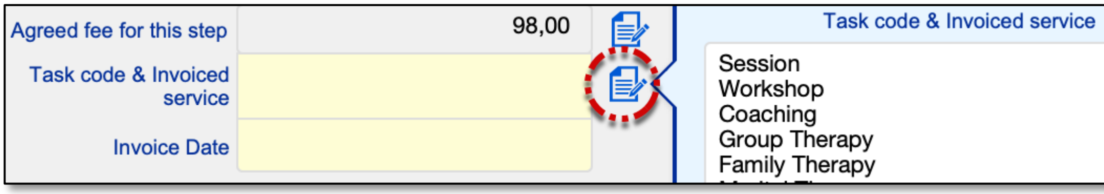


Click on the amount or the blue arrow to insert the agreed fee in the cost of the service; then in the invoiced amount ... until paid.

If you forget to enter the agreed fee when creating the file, a button to the right of the item allows you to set or modify without having to return to the "Files" section.

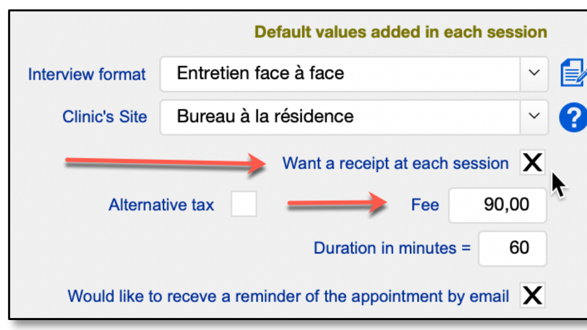
The invoiced service contains an editable list of values, but if you always use the same name for the billed service.

The icon text-shaped with a pencil next to field allows you to modify the list of values in the drop-down menu, without having to go to the "Options" section.



The date of the session will be also inserted into the invoice date or the date of payment by clicking on the title of the field.

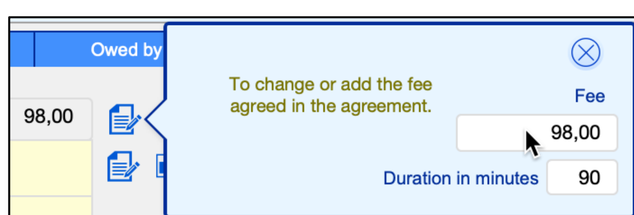
The field "Other costs" contains an editable list of values.



16.3.2 Billing the meeting automatically (one click)

If you have entered all the information in the default invoice, you can click on the progressive arrow button to enter all the invoice data with one click.
Another arrow also allows you to complete the payment with a single click.

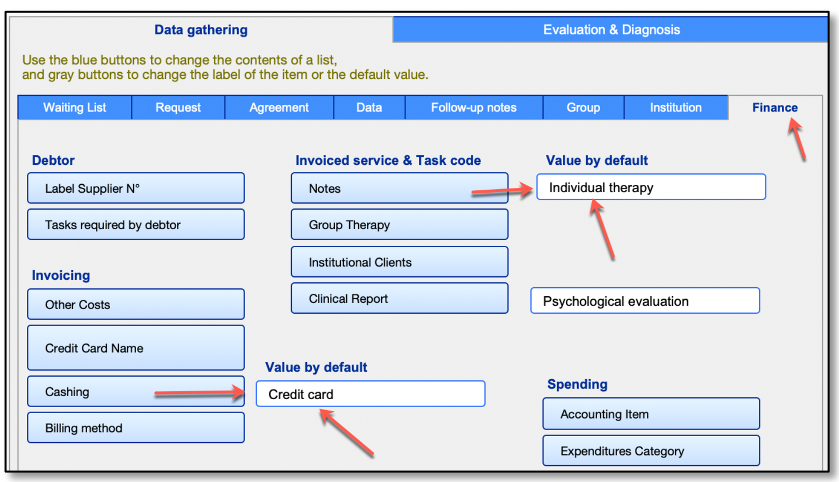
The default data to be entered are as follows:
In the " Folders " section: The fees
In the "Options/List/Datagathering/Finance" section: The Billed Service and the Method of Collection



In addition, for each of this information, in the Notes section a tool located next to the field allows you to enter the default value if you forgot to define it in the "Options" section.

A similar tool allows you to enter payment information with a single click.

If you want the automatic invoicing tool to include payment entry, then you must check the section "Wants a receipt at each session" in the Folders/Registration section.

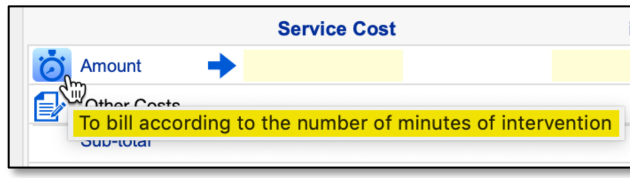


16.3.3 Bill according to the duration of the intervention

When you click on "Amount" this enters the fee provided in "the cost of the service". You can also enter an amount directly under "Cost of Service". In doing so, you charge a global cost for the service.

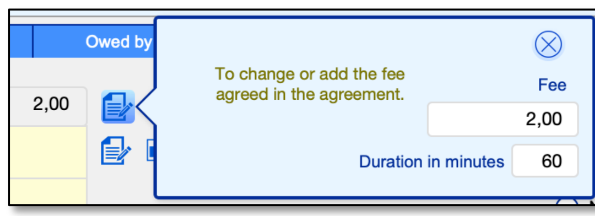
But if you prefer to charge according to the duration in minutes of your intervention, BaseDPsy has the necessary tool.

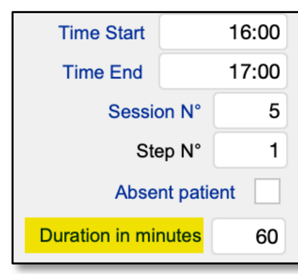
Just before the word "Amount" there is a stopwatch icon. By clicking on it, the cost of the service will be defined by the multiplication of the tariff and the number of minutes of your intervention (session).



If the amount inserted in Service Cost does not suit you, you can change the rate or duration by clicking the edit icon next to the fee.

In this example, at $ 2.00 per minute, your fee will be $ 120 an hour.
The duration displayed in this tool is the same duration as displayed in the content pane under the start and end times of the session. By changing the duration to one place, it is automatically changed to the other place.

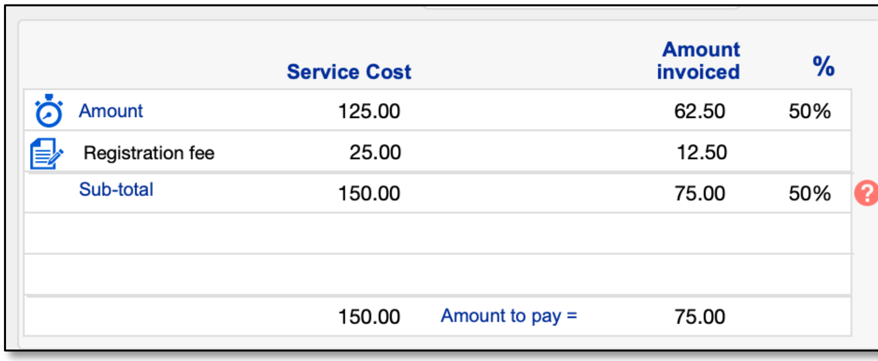


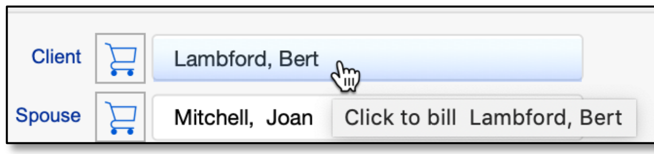


16.3.4 Cost-sharing in the first step

If you want to share the costs, you must make as many invoices as there are different people or organizations who share the cost of service.

Here is an example:
If the debtor does not pay the costs and want to share the costs with an external debtor:
For example, you want to charge <u>50% of the cost of the session</u> to an external debtor and 50% to the client itself.



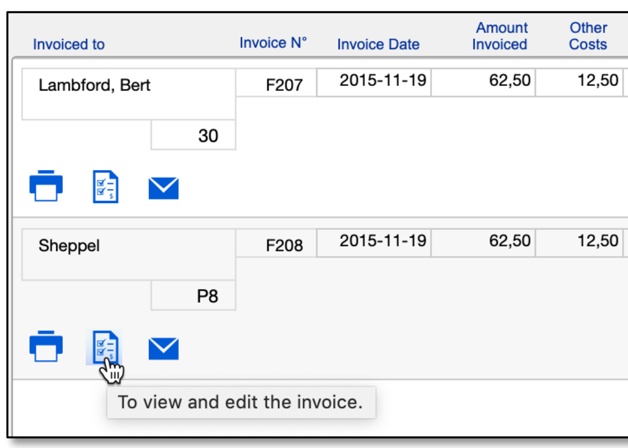


Make two bills: one to the debtor and one to the client that include the cost of session and other cost. To make two invoices, you must first enter the information on the invoiced amounts (first step); and then click on the name of the invoiced entity (second step)

After that, you will be able to see two bills under the "List of invoices for this session" tab is available after having complete the second step.

We see that two different invoices were created for the same session.

By clicking the icon with bill symbol, you can view one or the other of the two bills.



16.3.5 Second Step

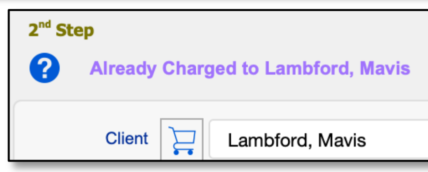
When you have entered all the financial data necessary for billing information, you go in the space of the second step and you click on the name of the person or the debtor on behalf of whom, the invoice will be recorded.
The names are displayed only if you have entered their name in the "Data" section.

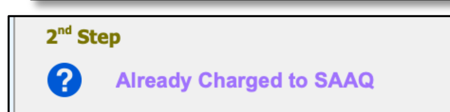
The tool with the shopping cart icon is used to record a subsequent payment on the billing date (deferred payment).

The field for "Other payer" is for a payer other than those identifiable in the "Data" section. If you need it, you enter a name in the field and an arrow is added, on which you click to save the invoice.

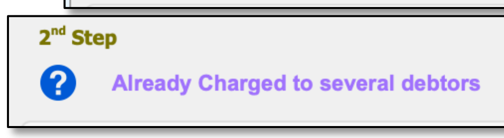
Once the invoice is recorded, a notice appears at the top of the second stage in order to prevent you from charging more times than necessary.

The notice shall contain the name of the person to whom you charged the cost of the service, if you have not created a single invoice for the session. If you have created several invoices for the costs of the same service, even if it is the same person, the notice will tell you charged several debtors.

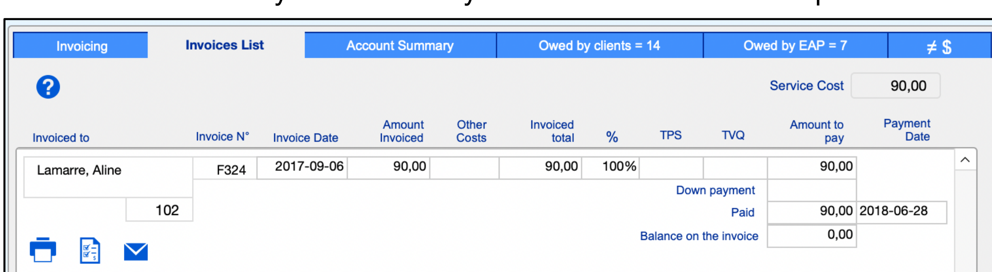




The question marks contain a reminder of the explanations of the tools available in the interface.

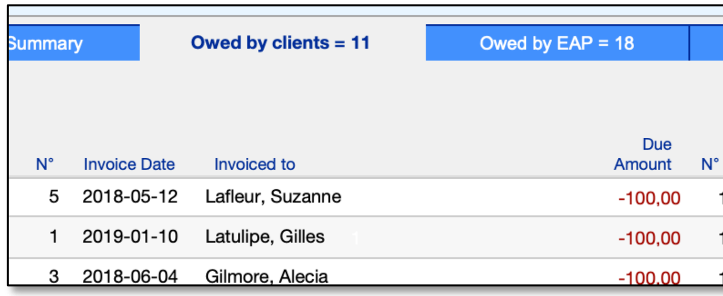


At any time, you can check under the "List of invoices", the total charged and the number of invoices created for the same session.
The envelope-shaped button is visible only on iPad or if you use FileMaker Pro to open PsyTablet.



Owed Sessions

Added two tabs in the Notes section to see all unpaid sessions with the name of the billed client or EAP.



There already existed in the General Book the tools to display the sessions due. But these tools require you to change section and change the criteria for displaying transactions in the General Ledger.

There is a tab for sessions due by the client and another tab for sessions due by Third-Party Payers.

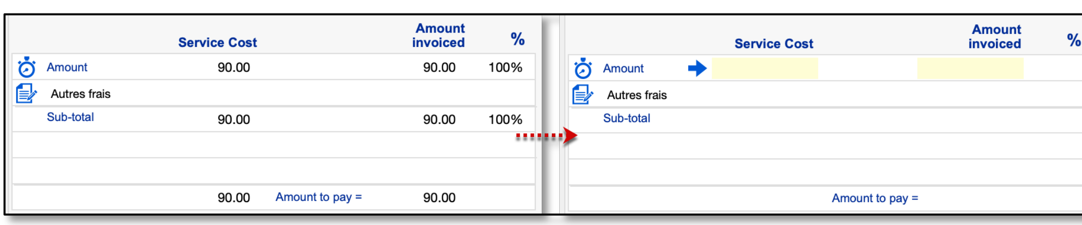
16.3.6 Adding a taxed service (or vice versa)

If your usual services are not taxed, but you need to add an invoice for a service or the sale of an item that is taxed, or otherwise, your services are generally taxed, but you want to add an invoice for a service that to which taxation does not apply, here's how.

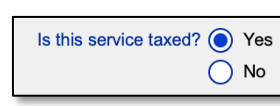
To simplify the explanation, we will take the example where your therapy services are not subject to taxation.

After recording the bill for an untaxed therapy session, redisplay the first step billing section.

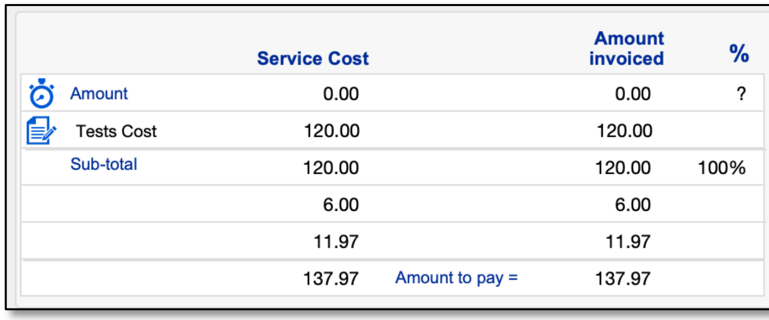
1. And delete the information that is there



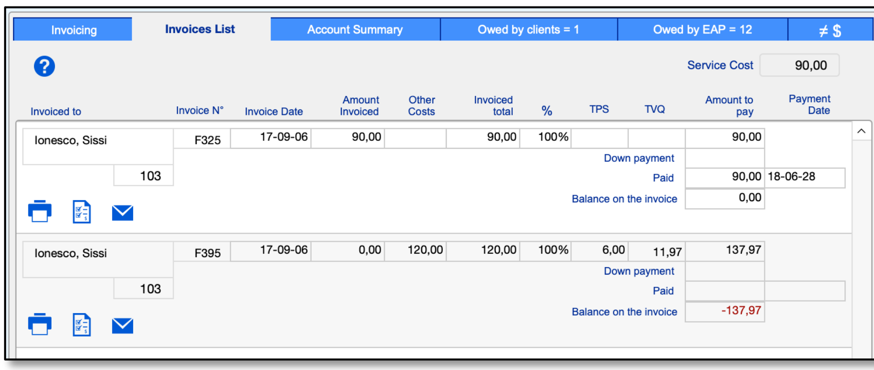
2. Then tick the option: Is this service taxed?



3. Enter the service information



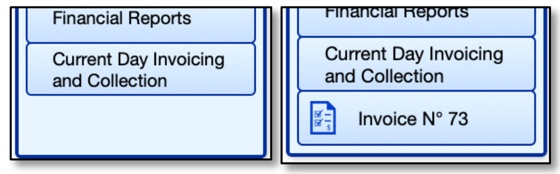
4. Go to the 2nd step billing section, and click on the payer's name to save the bill in the ledger.
You will have two invoices for the same session, one without tax and the other with tax



16.3.7 Editing an invoice afterwards

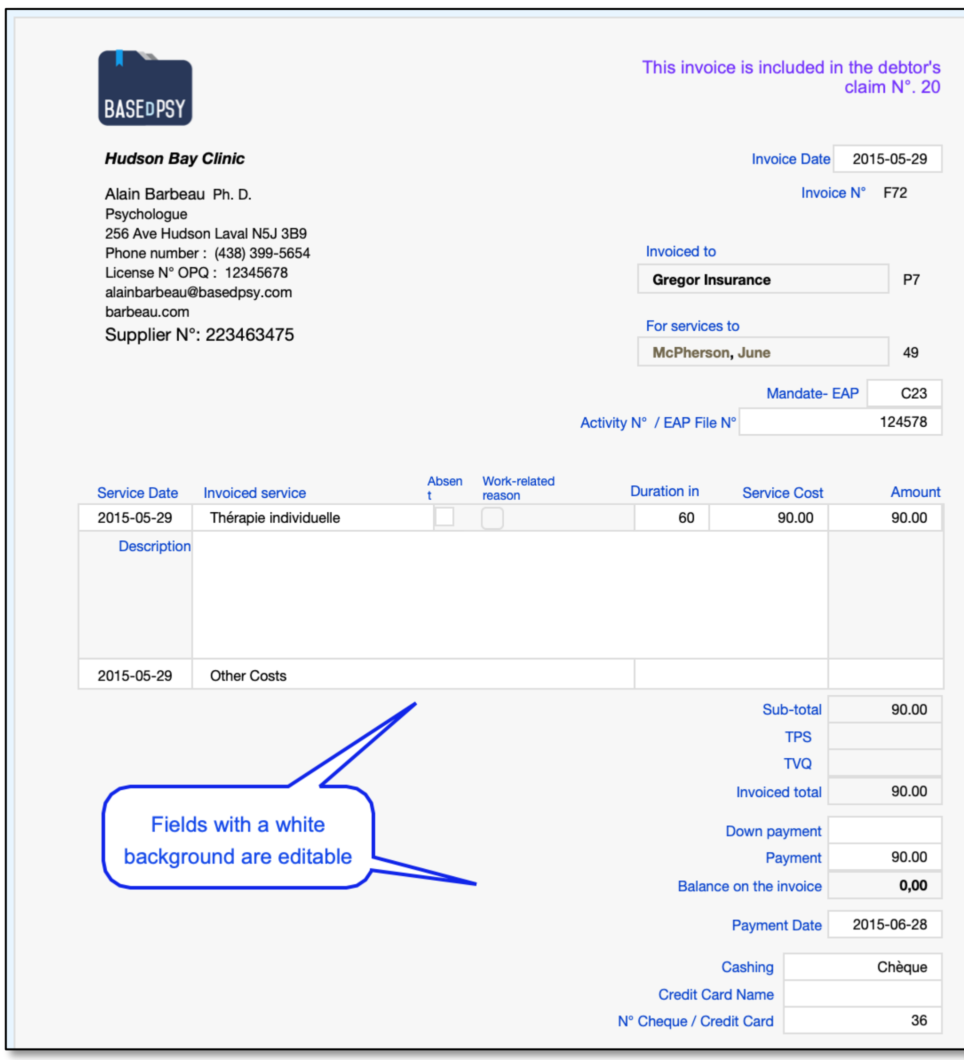
It is of course better not forget to enter financial information in any field and to enter all relevant data before recording an invoice. But all sorts of contingencies may result in the need to make changes to an invoice.

You can change the contents of a bill already registered by clicking on the icon for this purpose in the list of invoices for the same session or the button containing the invoice number at the bottom of the "Finance" drop-down menu. If the button is absent, it means that the service has not been billed.



However, in the editing interface of the invoice, only a few items are modifiable: those with a white background.

The utility of this interface is only to let you modify the financial data in fields that are not editable in the Ledger.
You can not delete the invoice when it was included in an already service payment claimed to an external debtor. A notice will appear at the top of the invoice to remind you.

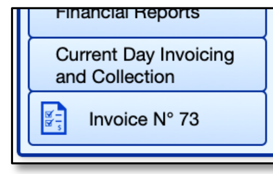


16.3.8 Correction and deletion of invoices

If you make a mistake in billing a client, it is possible to correct under certain conditions.

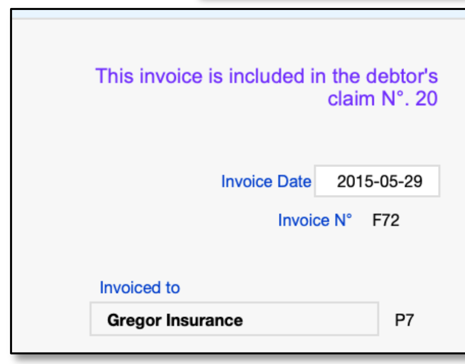
You cannot fix anything directly into the General Ledger. Instead you must edit the invoice.

To display an invoice and modify it, from the "Notes" section you first display the "Invoicing" pane, then the "Invoice List" tab; In the line of the invoice concerned, you click on the invoice icon, or on the button containing the invoice number at the bottom of the "Finance" drop-down menu.



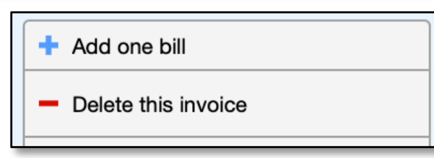
The button displays an interface where most of the items on the bill are modifiable.

But « **Take care** », if the invoice has already been included in a claim to a third party payer, nothing should change because you will then create errors in your accounts. Should not either delete the invoice.



If you stick to delete this invoice, you must first display the claim to the debtor in the debtor section to clear the links between these different accounting items and then repeat a claim to the debtor with other transactions. And then go back to delete this transaction.

The alternative is always the same in the accounting rules: create a new journal entry that will compensate for the error.

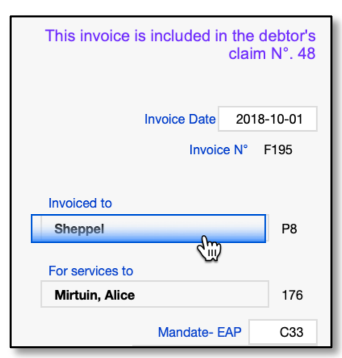


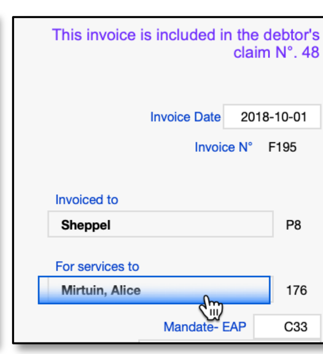
There is a tool to remove the bill, but the accounting rules say it is better to make a new journal entry to correct an inaccurate invoice.

Quick Search

The Quick Search function in the Invoice section allows you to search for a payer name and a customer name that has received services.

When you display the window containing the invoice so that you can modify it, sometimes you have to correct several invoices from the same customer or payer.



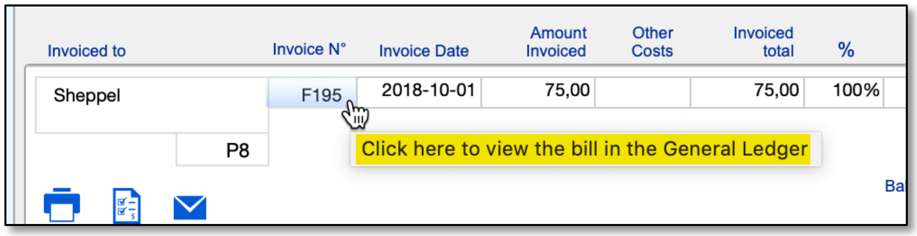


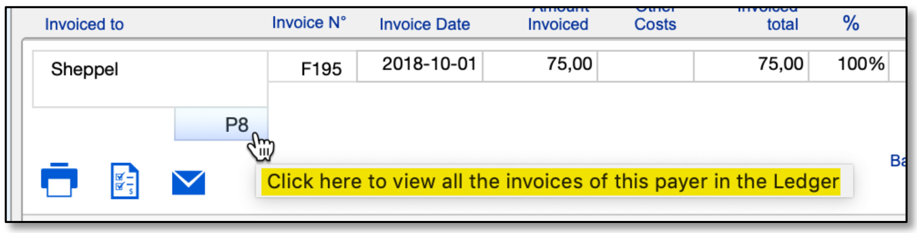
Two other tools are available:

1. Click on the debtor's name to display all the invoices with the same debtor.
2. Click the beneficiary name to view all invoices that have the same customer as the service recipient.

16.3.9 View invoice of a session in the Ledger

To view an invoice in the ledger without having to look for it, you first display the table under the tab "List of invoices ...". Two tools are present for this purpose: The invoice number and the ID number of the debtor.

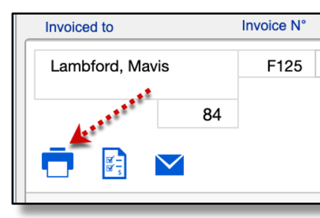




16.3.10 Print an invoice or receipt

You can also print the invoice or receipt with the same amounts by clicking on the relevant icon in the invoice list.

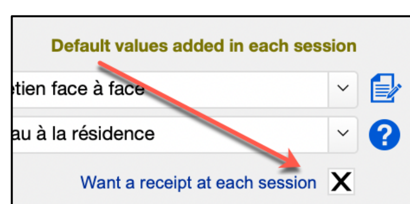
The procedure offers you the choice between printing an invoice or a receipt.
If you use FileMaker Pro, or use our hosting service to open PsyTablet, you will also have the choice between printing or exporting in PDF format.



To send an invoice, receipt or a document by e-mail, see chapter "7".

16.3.11 Automatically print an invoice or receipt

In the "Files" section, registration section, you will find a checkbox entitled: "Wants a receipt for each session". If you check this box, you will not need to go under the " Invoice List " tab. The printing of the receipt or invoice will be launched at the same time as you click on a name (client or parents) to save the invoice in the general ledger.



However, note the following specifications since the automation requires the least possible user intervention:

If the customer's balance due is negative (he owes you money), it will be an invoice that will be printed automatically; on the other hand, if the balance due is zero (he owes you nothing), it will be a receipt that will be printed.

16.3.12 Forgetting to bill sessions?

There is a list of non-billed sessions under the tab whose title is « ≠ $ »
This list allows you to find the sessions that you might have forgotten to invoice or that you have voluntarily failed to bill.

You can also filter the list with the month and year of your choice. The list of years is limited according to the dates of the sessions already recorded. For example, if the year 2016 is missing from the list, it is because you have not created any session whose date is in the year 2016.

16.3.13 Account Summary

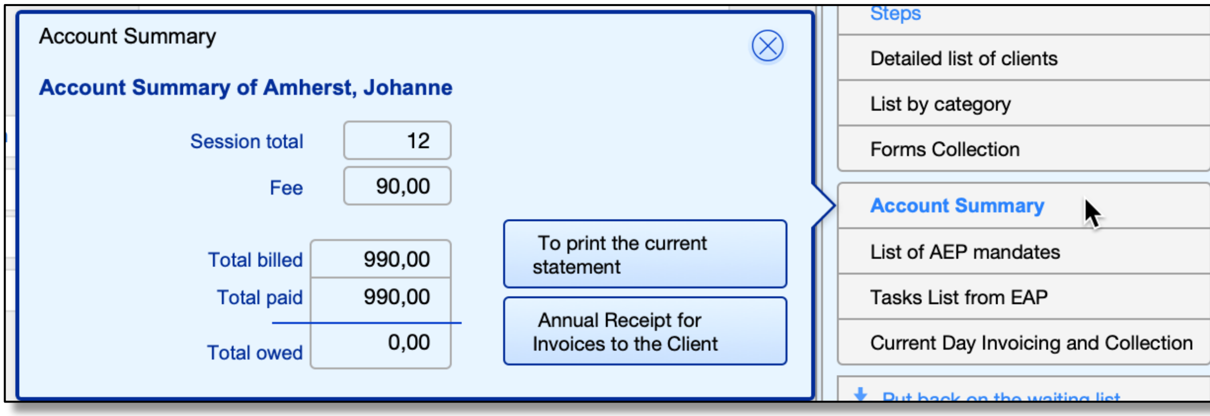
The account summary shows the difference between billed and paid services.

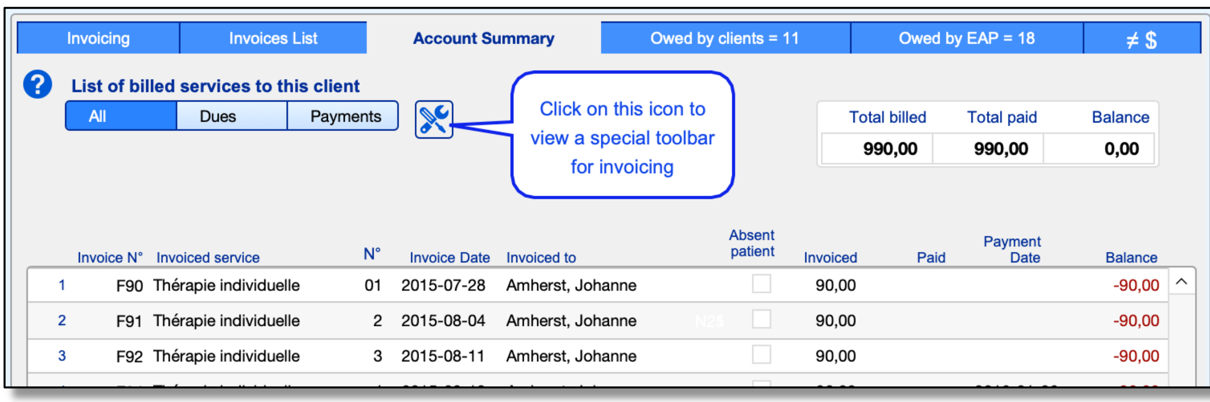
In the "Notes" section you will find a detailed summary under the "Account Summary" tab, itself in the "Invoicing" pane.
This table shows all the services billed to the client, not just the sessions.
Under each of the tabs in the detailed summary, there are buttons to display only "due" or "paid" invoices or all invoices from the same customer.

You can sort the table by clicking on one or the other column title.
The sorting is always in the "descending" direction in order to display at the top of the list the last transactions.

You'll also find a list of billing-specific tools to print or pay for one or a series of invoices. The series of invoices grouped according to a choice of dates defined by you. In addition, to all the tools present is attached an explanation of the tool.

In the other sections, you can also have a quick overview of your client's account balance by clicking on the "Account Summary" button. This action activates a pop-up window that displays the totals and account balance as well as two buttons to print the client's invoices as a statement or an annual report.





17. Statement of account, annual receipt and monthly invoice

17.1 Billing concepts

BaseDPsy allows to print for the customer different types of documents concerning the invoicing of your services. These documents may be named: Invoices, monthly invoice, annual invoice, statement of account.

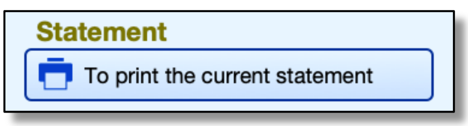
In order to navigate, here are some definitions as used in BaseDPsy:

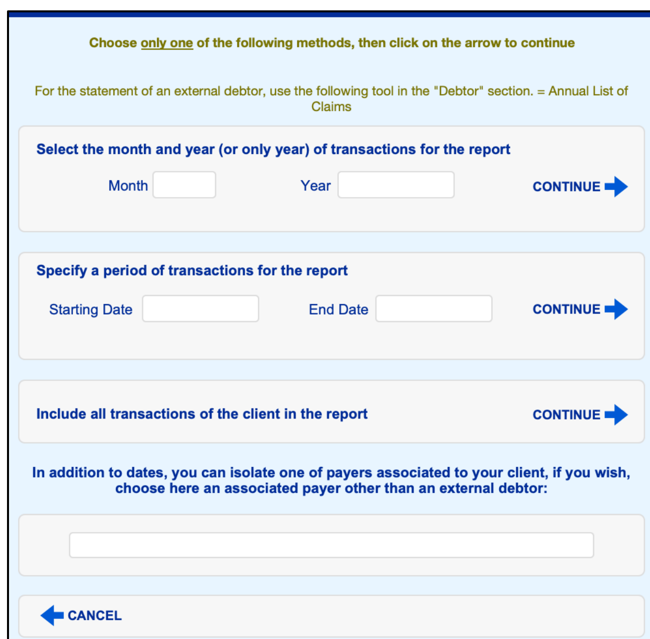
- A statement of account includes invoices due and payments (invoices paid) from the beginning of services until the date of printing;
- A monthly invoice includes only unpaid services between two dates chosen by you, even if the dates chosen do not correspond to the beginning and the end of the month.
- An annual receipt is a list of invoices and payments covering a fiscal year delivered to the client for tax receipt purposes.

The tools to print either of these objects can be found in the "Notes" section in the "Invoicing" pane under the "Account Summary" tab.

Click on the tool icons to display them.
See below their description.

17.2 Print a statement





Using this tool, the procedure first offers you to choose the dates of the statement of account, as well as the payer if you have had several payers for the same service.

If you had several payers for a client, for example, the father and mother paid alternatively for the child who was your client, you can print a statement of account for the father and one for the mother by inserting the parent's name in the bottom box.

But this procedure is not valid for an external debtor (EAP, insurer, etc.). In the latter case, you have to go to the "Debtor" section to print the statement.

In addition to dates, you can isolate one of payers associated to your client, if you wish, choose here an associated payer other than an external debtor:

Lambford, Bert

Depending on the options you have checked, you will also have the choice to export or not the result in an "Excel" table.

Do you want to export this table as "Excel"?

No Yes

The appearance of the statement of account is also dependent on the choice of invoice format you have made in the "Options" section. The example on the right uses the "Auto" invoice format.

Hudson Bay Clinic

Alain Barbeau Ph. D.
Psychologue
256 Ave Hudson Laval N5J 3B9
Phone number : (438) 399-5654
License N° OPQ : 12345678
alainbarbeau@basedpsy.com
barbeau.com

BASEDPSY

Statement : 136
2019-02-25

Lapointe, Lise
2135 S-Laurent Street,
Montreal,
Quebec, Ca, 8M9 Y8F

Service Date		Amount invoiced		Paid	Absent	Payment Date Cashing
2018-08-23	Lapointe, Lise		Amount to pay	100,00		
Invoiced service	Thérapie individuelle	100,00	Down payment			
Other Costs	Autres frais		Paid	100,00		2018-12-28
			Balance on the invoice	0,00		Chèque
2018-08-30	Lapointe, Lise		Amount to pay	100,00		
Invoiced service	Thérapie individuelle	100,00	Down payment			
Other Costs	Autres frais		Paid	100,00		2018-12-28
			Balance on the invoice	0,00		Chèque
2018-09-06	Lapointe, Lise		Amount to pay	100,00		
Invoiced service	Thérapie individuelle	100,00	Down payment			
Other Costs	Autres frais		Paid	100,00		2018-12-28
			Balance on the invoice	0,00		Chèque
2018-09-13	Lapointe, Lise		Amount to pay	100,00		
Invoiced service	Thérapie individuelle	100,00	Down payment			
Other Costs	Autres frais		Paid	100,00		2018-12-28
			Balance on the invoice	0,00		Chèque
2018-09-20	Lapointe, Lise		Amount to pay	100,00		
Invoiced service	Thérapie individuelle	100,00	Down payment			
Other Costs	Autres frais		Paid	100,00		2018-12-28
			Balance on the invoice	0,00		Chèque
		Totals	Invoiced	**500.00**		
			Down payment			
			Paid	**500,00**		
			Balance	**0.00**		

- TVA non applicable, art. 261-4-1 du CGI
- Membre d'une Association de Gestion Agréée; le règlement des honoraires par chèque est accepté
- Toute facture se doit d'être acquittée au plus tard 15 jours après la date d'émission
- En cas de retard de paiement, application d'une indemnité forfaitaire pour frais de recouvrement de 40euros, selon l'article D.441-5 du code du commerce

Alain Barbeau

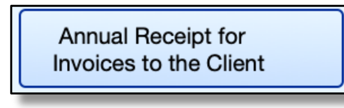
The tool for printing the statement is also available in the "Data" section inside the window that appears by clicking on "Account Summary".

To print the current statement

17.3 Print an annual receipt

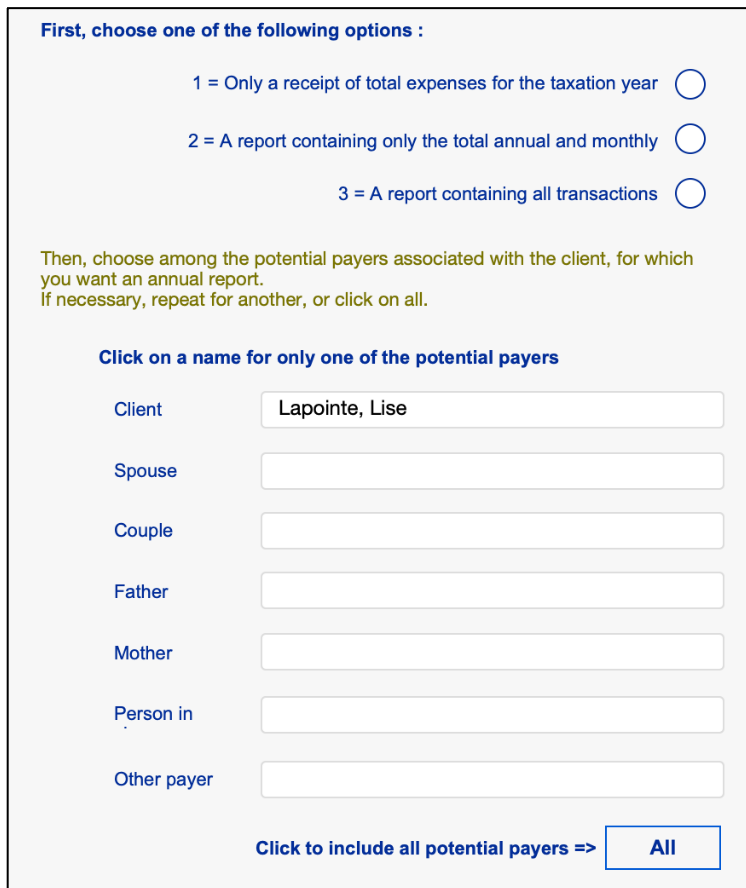
The tools for producing these client-specific financial reports (payer) are available in the following interfaces: Data, Notes, Institutional Clients by clicking on "Account Summary".

For participants in group therapy without a personal record, the tool is available in the "Group Dating Notes" section.



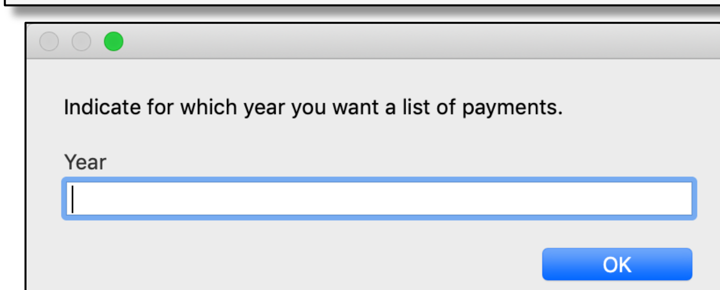
For external debtors, such as EAP, insurers, organizations, etc., use only the tools available in the "Debtor" section.

By launching the procedure, it offers you several choices on both the type of annual reports and the identity of the payer. A first choice is mandatory: either the type of report.



Once your choices are made, the procedure asks you for which calendar year you want the receipt.

If you leave the "Year" field empty, the receipt will include all services regardless of the year.



Here is an example.

There is only one template for printing the annual receipt, regardless of your choice of invoice template in the "Options" section.

Hudson Bay Clinic

Alain Barbeau Ph. D.
Psychologue
256 Ave Hudson Laval N5J 3B9
Phone number : (438) 399-5654
License N° OPQ : 12345678
alainbarbeau@basedpsy.com
barbeau.com

List of payments by Lapointe, Lise

For services to
= Lapointe, Lise
2135 S-Laurent Street,
Montreal,
Quebec, Ca, 8M9 Y8F

Service Date		Payment Date Invoice Date	Invoiced	TPS	TVQ	Invoiced total	Paid	Balance on the invoice
2018/08/23	Thérapie individuelle	2018/12/28	100.00			100.00	100.00	0.00
2018/08/30	Thérapie individuelle	2018/12/28	100.00			100.00	100.00	0.00
		août	200.00			200.00	200.00	0.00
2018/09/06	Thérapie individuelle	2018/12/28	100.00			100.00	100.00	0.00
2018/09/20	Thérapie individuelle	2018/12/28	100.00			100.00	100.00	0.00
2018/09/13	Thérapie individuelle	2018/12/28	100.00			100.00	100.00	0.00
		septembre	300.00			300.00	300.00	0.00
Cumulative amount at 2019/02/25			**500.00**			**500.00**	**500.00**	
							Balance	**0.00**

Alain Barbeau

page 1

Outcomes in date of 2019-02-25

17.4 Print a monthly or recurring invoice.

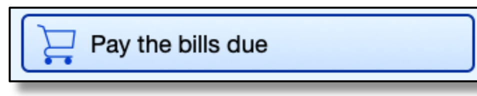
Many professionals prefer to issue a periodic or monthly bill to their patients.

Some will issue an invoice at the end of the month for all services offered during the month, while others use billing dates that may run for more than one month, for example, from March 15 to April 15.

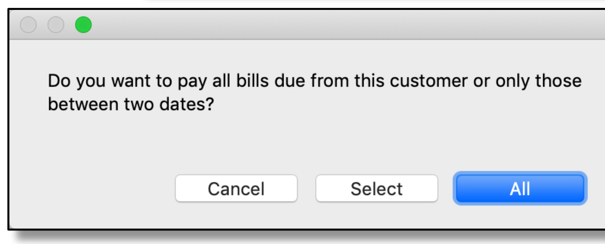
The periodic billing procedure allows you to choose the billing dates. Two tools are available: one will print only invoices due between two dates, while the other will print all invoices, due and paid, between two dates.

This tool prints all paid and due invoices between two dates and can be used as a receipt for a period of service.

This tool prints all invoices between two dates but only those that are due. The tool is therefore used to print a monthly or periodic invoice.

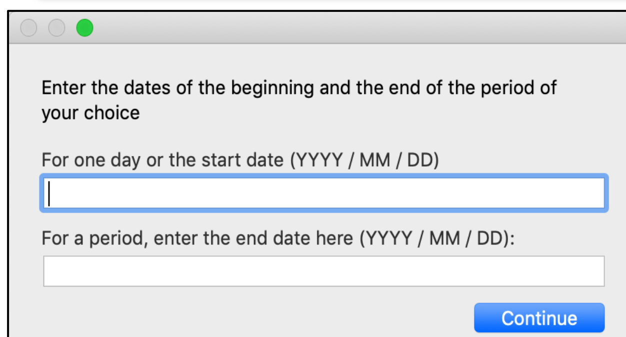


When you start the "Print due invoices" procedure, it offers you to choose the dates.



If you are used to making an invoice every month or periodically, then you know that the only invoices due are those of the period to be invoiced, so you can use "All" without having to choose dates.

If you click “Select”, another dialog box asks you to enter the dates.



If you do not enter dates, this is the same as having previously chosen "All".

The appearance of the periodic invoice is dependent on your choice of invoice format in the "Options" section.

17.4.1 Invoice numbering and reprinting of invoices

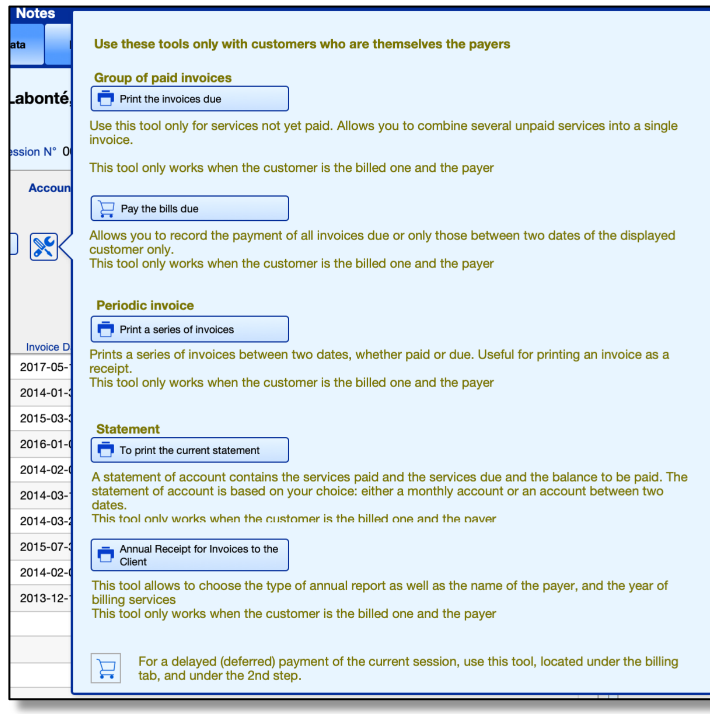
Each time you bill a service, you receive a message that the transaction has been recorded to the ledger.
At the same time, a "Number" has been assigned to this transaction in the General Ledger, and this number is the number of the individual bill.

This number is always preceded by the letter "F" for invoice, for example "F387".

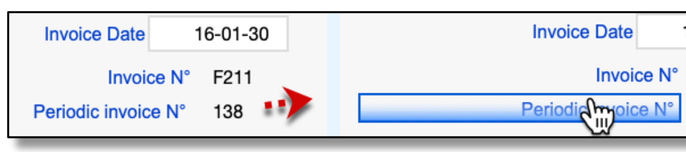
However, if you use the special tools found under the "Account Summary" pane

A special number will be generated to identify the grouping of transactions in a single invoice and a title will be added to the grouping of individual invoices.

For example, a statement will be named: "Statement of Account N° 138"
By displaying the section to edit the individual bill, both numbers are present, and two separate tools are present, either to print one or the other.



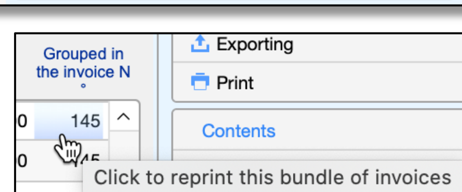
If the individual invoice is not part of an invoice bundle, the group number and the tool for printing the bundled invoice are not visible.



Note that a new number and new invoice grouping is created each time you use one of the following tools:
"Print the due invoices"
"Print a series of invoices"
"To print the current statement"

In the section to edit an invoice, you can isolate all individual invoices that are part of a consolidated invoice by clicking on the title.

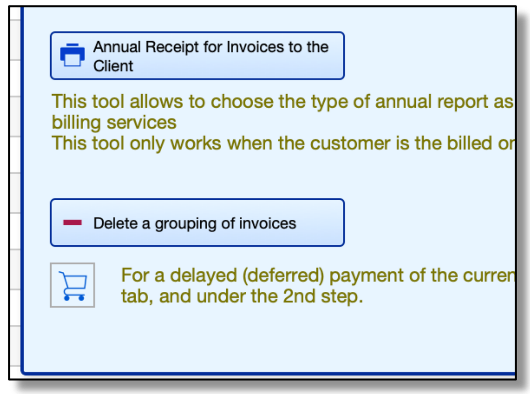
To reprint a recurring invoice or statement, you can use the button for this purpose in the section to edit the invoice



Or click on the Periodic Invoice Number (Invoice Bundle) in the Invoice List under the Account Summary tab in the Notes section.

We've also created a tool to remove a bundle of invoices, which can be useful if the bundle is misleading or incomplete.

The tool has been added to the special Account Summary toolbar in the Notes section.

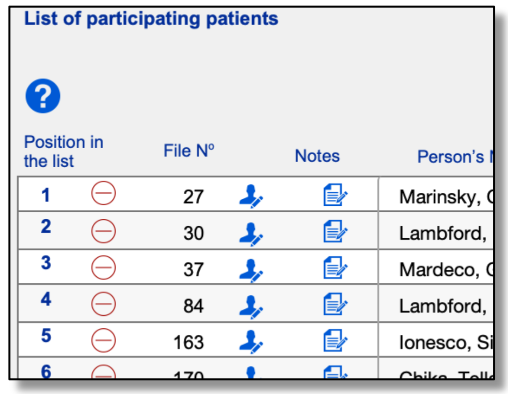


18. Invoicing the meetings of a group therapy

18.1 Steps prior to invoicing

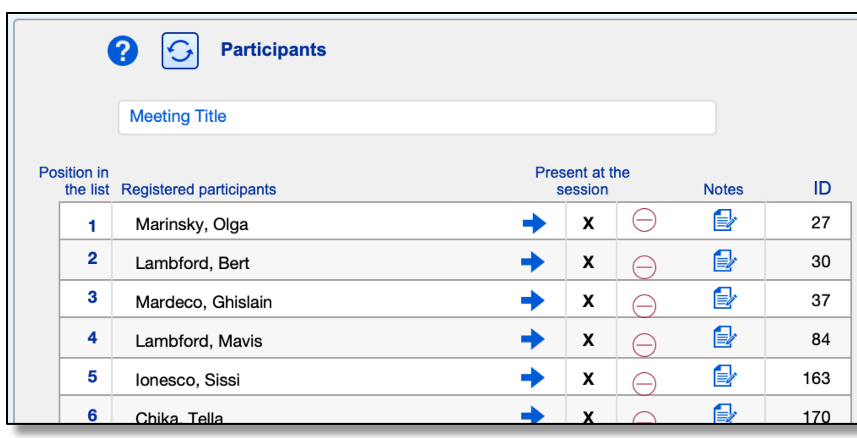
Ensure that the list of participants is complete

Display the "Group Therapy" section, then click the "Participants" tab to make sure that the list of registered participants is correct.



Ensure that all presences are registered

See the section "Group Meetings," click on the tab " Meeting Info" then look under the "Participants" tab if all registered and present participants have an "X" in the "Present at the session" column.

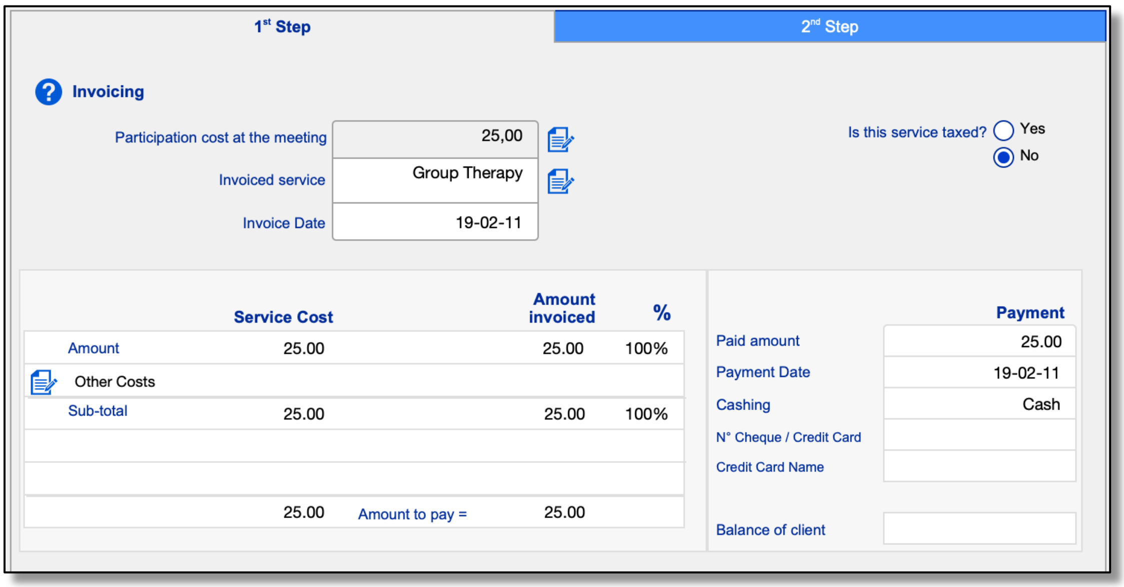


18.2 Invoicing each participant

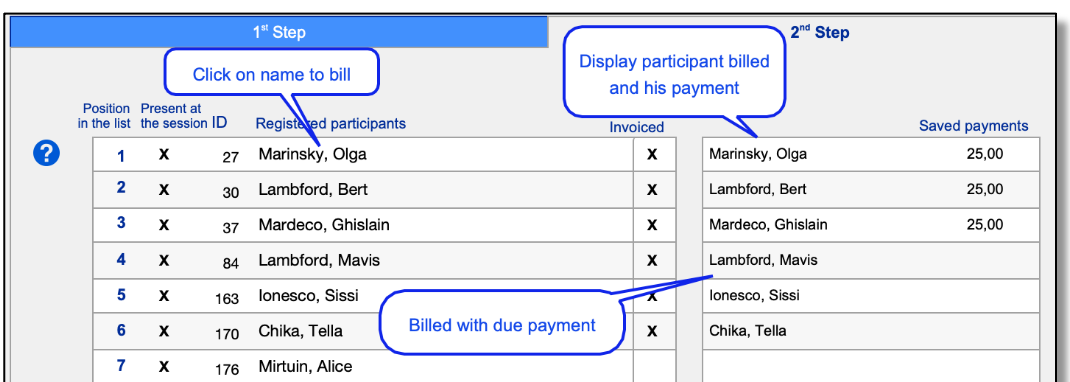
Step One: Enter financial information for billing.

In the "Group Meetings", click the "Invoicing" and its first sub-tab, also called "Invoicing", which still contains two tabs for the first and second step.

The interface has been designed to allow you to charge participants for each meeting.

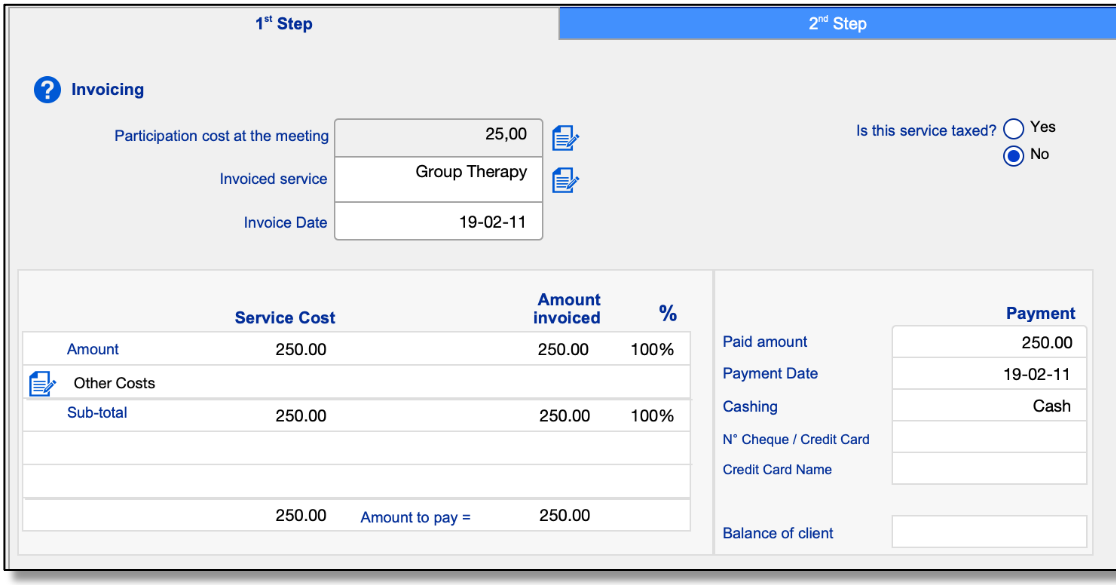


However, it is possible, if you wish, only charge once each participant with an overall price for the entire group therapy. You just have to choose at which meeting you make an invoice.



When you charge at each meeting and you probably charge the same amount to each participant, you will appreciate that the information you enter under the tab of the 1st step remains in place.

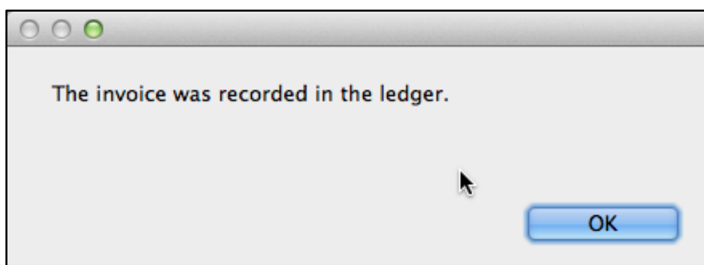
So, you will not have to repeat the input of financial information of the cost of each meeting for each participant.



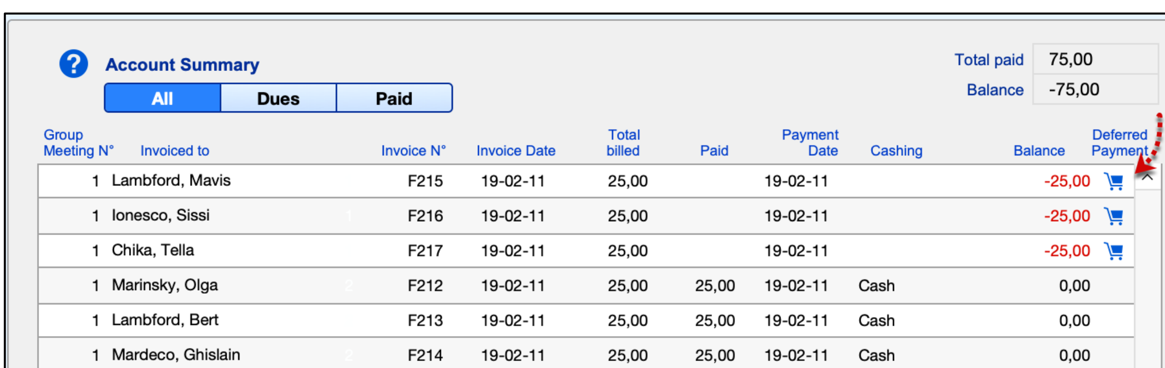
Second step: Register the invoice of each participant

Under the "2nd Step" tab, you can charge participants by clicking on the name of participants. If you specified the amount paid, payment will be recorded at the same time as the billing.

A notice informs you that the operation was successful.



To register a deferred payment (after the billing date), display the tab "Account Summary" and click on the cart icon.



19. Deferred payments.

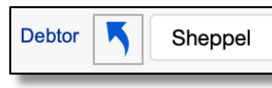
19.1.1 Paying a single due invoice

The procedure for deferred payment becomes necessary when a customer pays service late. The procedures explained if afterwards only concern services paid for by the customer himself.

<u>External debtors</u>

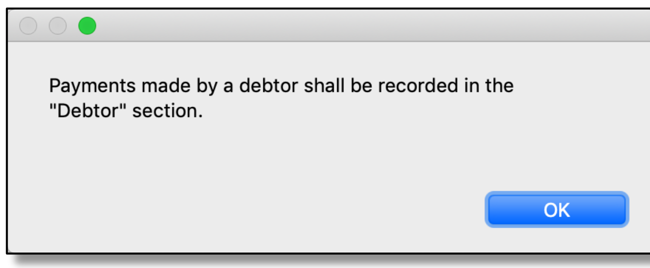
Under the "2nd step", the buttons for a deferred payment are only functional for the people connected to the posted client, except the external debtor.

Because in the case of external debtors, this is another procedure and it is located in the accounts receivable section.



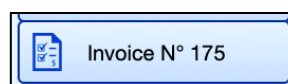
We have provided a reminder on this subject.

By clicking on the arrow next to the debtor's name, you will trigger the message and an automatic return in the "Debtor" section with the debtor's file in the foreground.

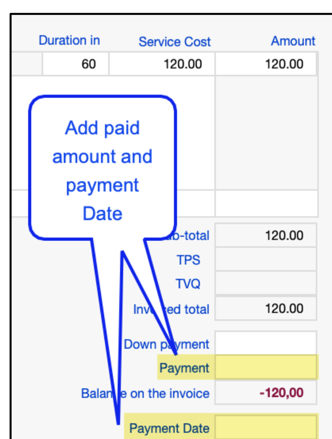


Three tools are available to pay a due invoice.

<u>Edit the invoice</u>



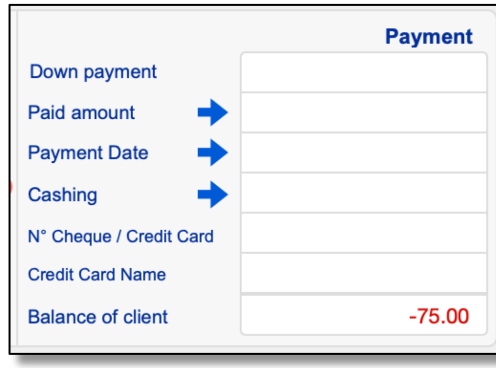
Display the invoice by clicking on the icon containing a magnifying glass under the "List of invoices" tab and then modify the contents of the payment items. It is as if you had corrected the original invoice by adding the payment.



Cart-shaped tools

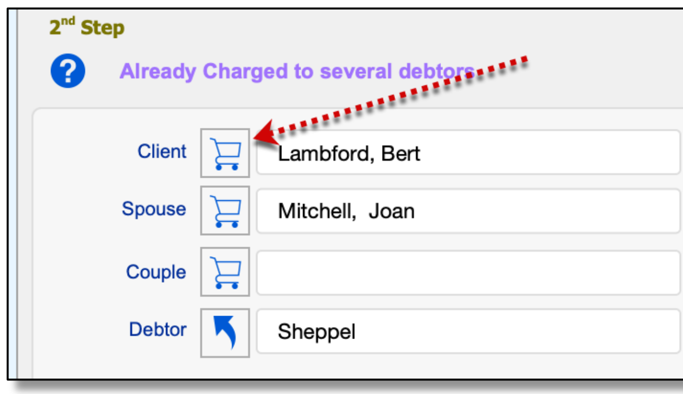
For a single invoice

First, you need to know if you are going to enter payment for one or more invoices because the procedure is different if you want to record the payment of multiple invoices.



If you want to record the payment of a single invoice, first display the relevant service and the "Invoicing" tab.

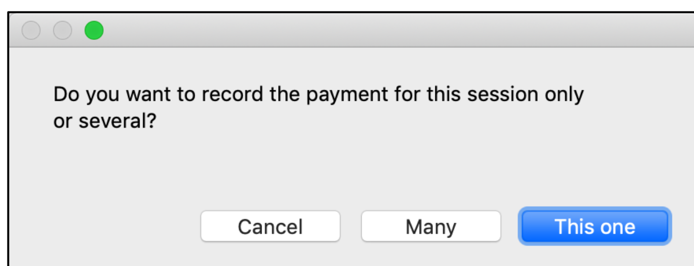
a) Then enter the payment information in the relevant area;
b) Once you have entered the information, click on the cart button.



Use the "cart" button next to a person's name, under "Step 2," to choose the payer.

This button allows you to choose the payer, if the payer is different from the displayed customer's person, such as spouse, father, etc.

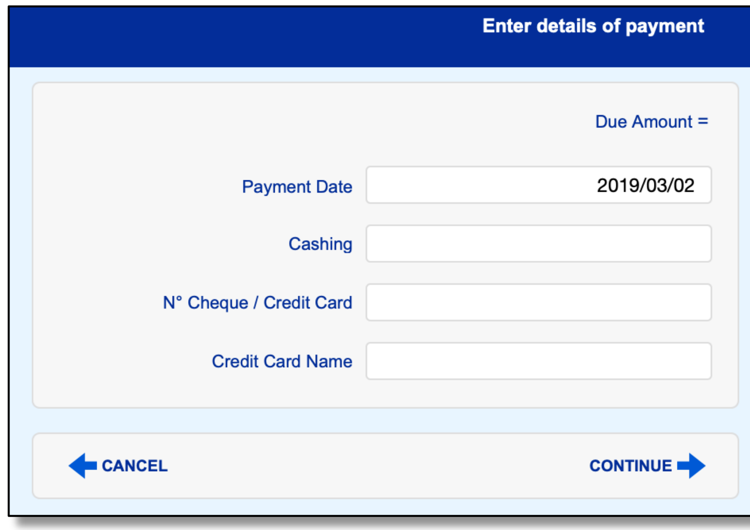
By clicking on this button, a dialog box asks you if you want to pay all the invoices or only one.



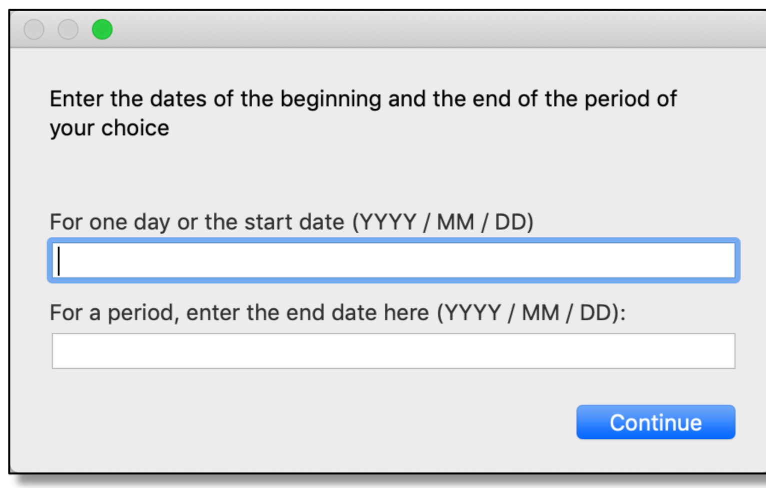
By clicking on "This one", you will pay the bill by designating the client or the close customer displayed as the payer, and the information entered in the "Payment" field will be added to the transaction in the General Ledger.

If you forgot to enter a mandatory payment information, the procedure will stop.

<u>For multiple bills</u>



If you choose "Many" a new dialog box will appear, asking you the information needed for payment.



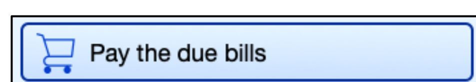
Then the procedure will ask you for which period.

If you do not enter a date, all displayed customer invoices will be automatically saved as paid.

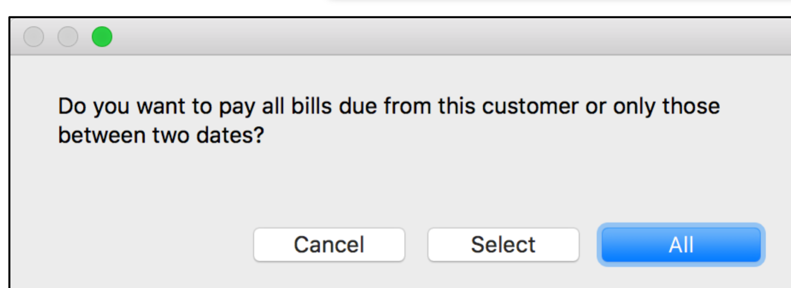
If you enter two dates, all invoices between the two dates will be saved as paid automatically.

General Tool

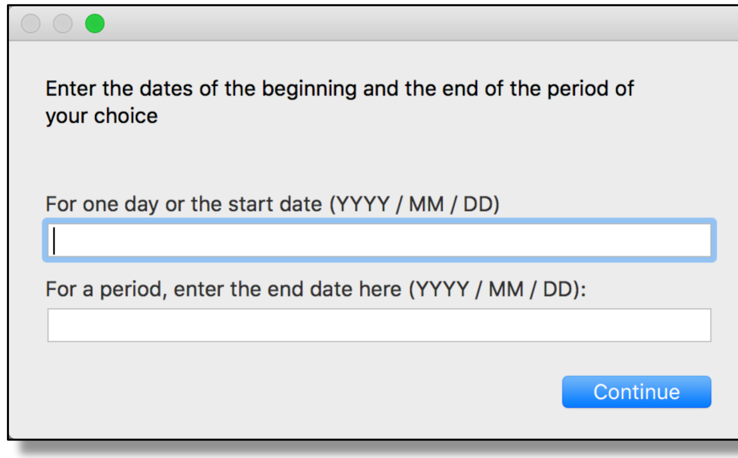
The « Pay the bills due » button under the "Account Summary" tab



By clicking on this tool, a dialog window asks you if you want to pay all the invoices or choose the dates of the invoices.

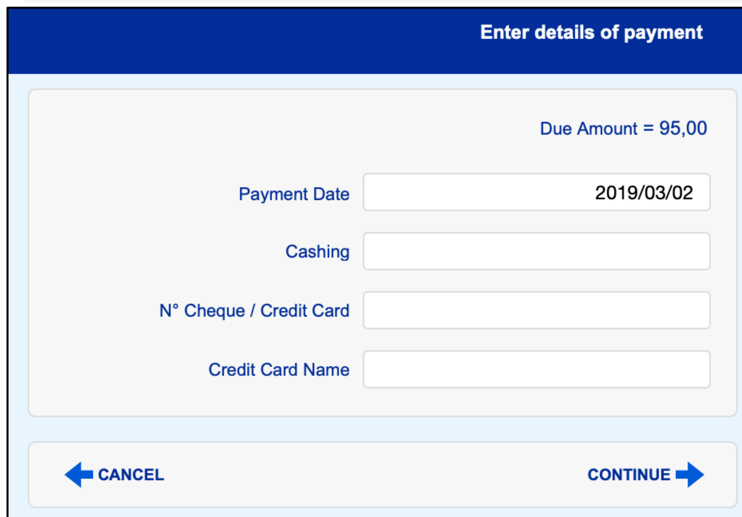


If you click on "Choose" a dialog box will ask you to define with two dates, the period covered by the payment ". Then another dialog box will ask you for additional information about the payment.

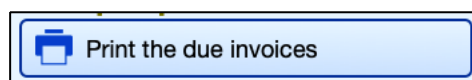


If you click "All", a new window appears asking for additional information.

Once the information is entered, by clicking on "Continue", the procedure will automatically record the payment of the invoices due (all or those between the two dates of the period).



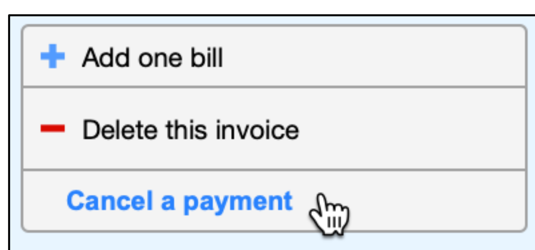
The "Print the due invoices" button is used to create an invoice for all the services due.



19.1.2 To Cancel a payment

View the section to edit the invoice, and use the designated tool.

For other billing procedures to work properly, it is recommended that you use this tool instead of manually deleting the contents of the payment related topics because the tool does more than simply erase the content. It activates other tools in the background.



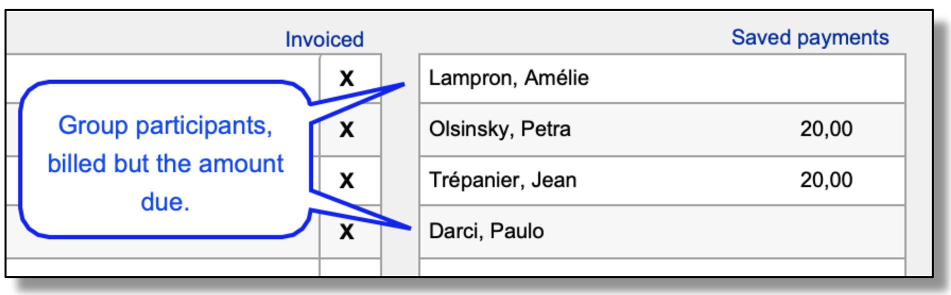
19.2 Deferred payment for participants in group therapy

In the first step of billing, if participants do not pay immediately at the meeting, leave the payment items blank.

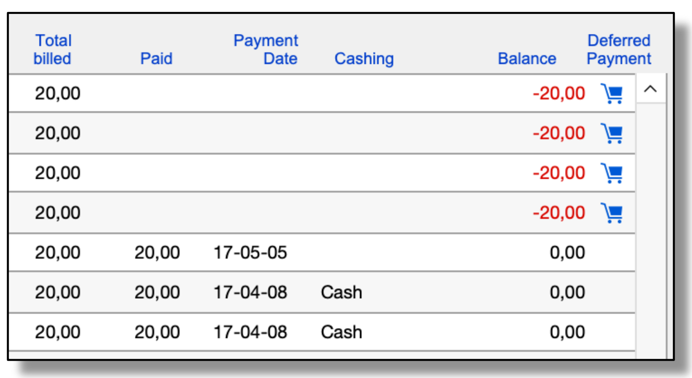
In the second step, you click on the name of the participant. This click will record the invoice amount in the ledger and add an "X" in the "Invoiced" column.

The billing action will add the customer name and billed amount in the right-hand column titled "Saved Payment".

<u>If you did not add the payment amount</u> in the first step, the name will be added without the amount.



This will also cause a symbol to appear in the list of invoices under the "Account Summary" tab. The "cart" icon will appear under the "Deferred Payment" column heading next to the amount due in red.



By clicking on this icon tool, you will register a payment amount equal to the invoiced amount to the same customer. And the amount paid, will appear in the extreme right column under the "2nd step" tab and the "Carriage" tool disappears from the list in the summary.

20. Debtors Invoicing (Third payers)

By external debtor, we hear a "third payer", ie an organization, an employer, an employment assistance program, insurer, etc. paying the services instead of the person receiving the service, the payment is complete or partial. This term does not include relatives of the clients, such as parents, spouse, etc.

Agreements management is done in 5 steps:

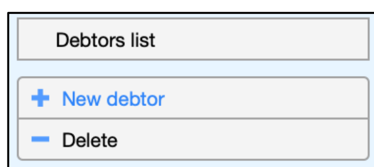
1. Create a folder debtor;
2. Associate a client to one of the debtors;
3. Create a mandate-EAP in the Client Data section;
4. Invoicing the hours of services to the associated debtor;
5. Claim the hours billed to the associated debtor.

20.1 Creating a debtor file.

20.1.1 Identify the debtor

BaseDPsy have a section specifically devoted to the creation of a debtor file, where you record the necessary information to identify the debtor. A button in the drop down menu "Finance" provides access to that section.

In the "Debtor" section, use the "New Debtor" button to create a folder.



Then you enter in the fields the information requested. We suggest to enter in particular the contact name and his phone number, as these data are visible in other sections of BaseDPsy, so you will avoid to note several times or having to return to this section to remember.

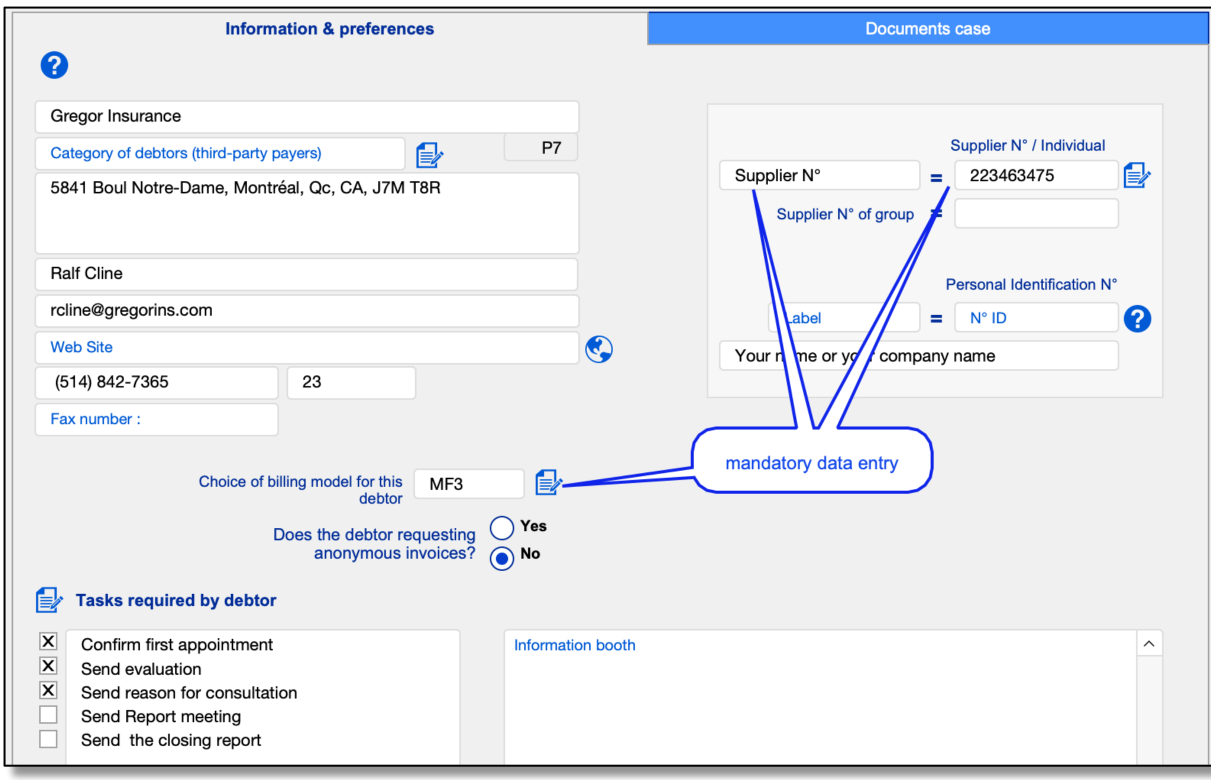
Under the "Bound Files" tab, you can insert documents provided by the debtor. If the debtor gives you "Forms" mandatory for its services, you can insert them in the "Bank Form" section, accessible from the dropdown menu of "Clinic". By inserting in the "Bank Form" you can copy them to use either in your client files or in your claims for payment to debtors.

However, before inserting them, make sure they are not already there by default.

20.1.2 Set Preferences debtor

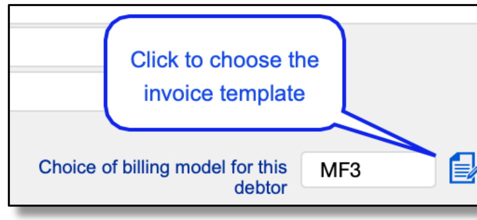
Under the tab "Information & preferences, it is important to also enter the information in the sections available.

These preferences remain valid for all future invoices. After saving choice, you will not need to do it again when printing other bills at the same debtor.



Choosing the invoice template

Choose the model that meets the requirements of the debtor. The difference between each model is based on the amount of information in the invoice.



Model 1 (MF1) contains all the financial information of a regular invoice.

Invoiced	Absent patient	Service Date	Payment Date	Invoiced	TPS	TVQ	Invoiced total	Paid	Balance
File opening									
Session		2014/01/07		45.00		50%	= % of Fees billed		
Amount to pay				45.00			45.00		-45.00 $
Cumulative amount at 2014/01/11				45.00			45.00		-45.00 $

Model 2 (MF2) contains no details of the charges (taxes) nor the "paid" column.

Invoiced	Absent patient	Service Date	Duration in minutes	% of Fees billed	Invoiced	Balance
File opening						
Session			90	50%	45.00	
Amount to pay		2014/01/07			45.00	-45.00 $
Cumulative amount at 2014/01/11					45.00	-45.00 $

Model 3 (MF3) contains the minimum financial information.

Invoiced service	Absent patient	Service Date	Invoiced	Balance
Session		14/01/07	45.00	-45.00 $
Cumulative amount at 2014/01/11			45.00	-45.00 $

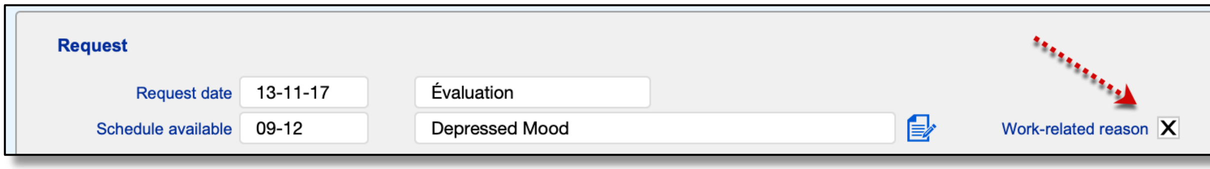
The model "Web" (MF8) was designed to be used when you enter information on a web portal of a debtor and you have a habit to charge multiple customers at the same time for a debtor.

Supplier N : 223463475

		Absent patient	Invoiced service	Work-related reason	Service Date	Invoiced	Balance
For services to	McPherson, June		Thérapie individuelle		15-05-15	90.00	0.00
Birthday	1971/05/14		Mandate N° C23				
For services to	McPherson, June		Thérapie individuelle		15-05-22	90.00	0.00
Birthday	1971/05/14		Mandate N° C23				
For services to	McPherson, June		Thérapie individuelle		15-05-29	90.00	0.00
Birthday	1971/05/14		Mandate N° C23				
For services to	McPherson, June		Thérapie individuelle		15-06-05	90.00	0.00
Birthday	1971/05/14		Mandate N° C23				
Cumulative amount at 19-03-02						360.00	0.00

It is the only model (Web) containing the mention "Work-related reason"

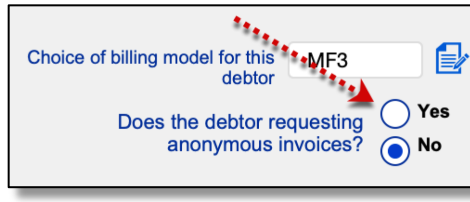
This entry is entered in the "Request" pane in the "Files" section.



Three invoice templates with modifiable header and footer in the Options section can now be used to invoice debtors: the two templates Envelope No. 10 and the "Auto" template.

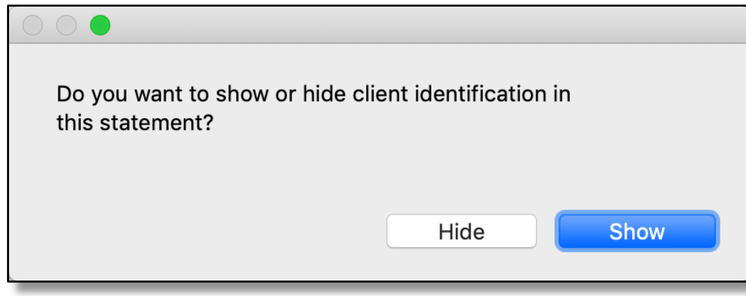
Anonymity

You then select whether or not the debtor wishes to have the client's identity information for which you charge it. This option applies to the first three models because the fourth model is always anonymous.

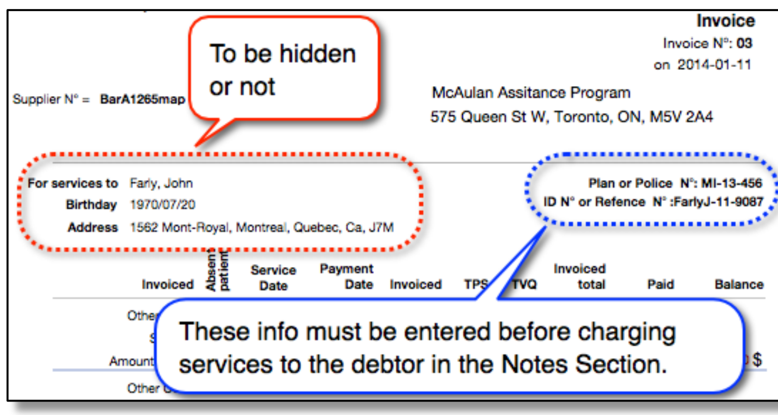


For the first three templates, if you do not check yes or no when printing the invoice, you will be asked each time if you want to hide the identity of your client.

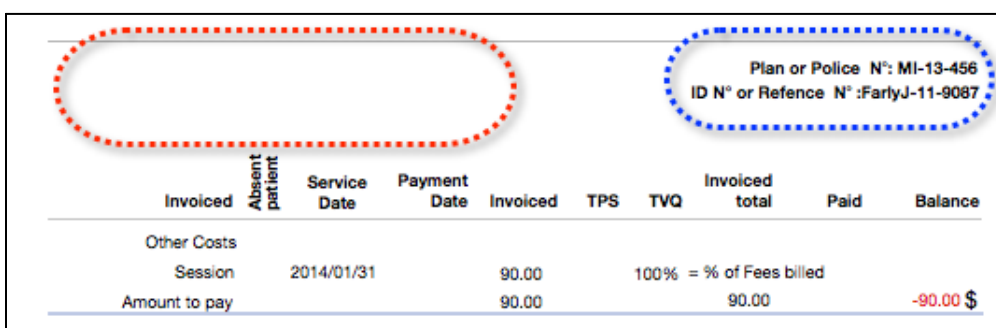
It is therefore preferable to avoid this by immediately checking the specific choice of the debtor.



By checking not, or choosing "No" at the time of printing, the client's identity is hidden as in the example below (red oval).



Only information references (circled here in blue) given by the debtor will be available.



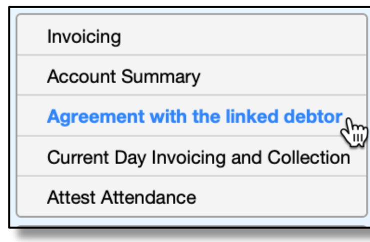
To do list

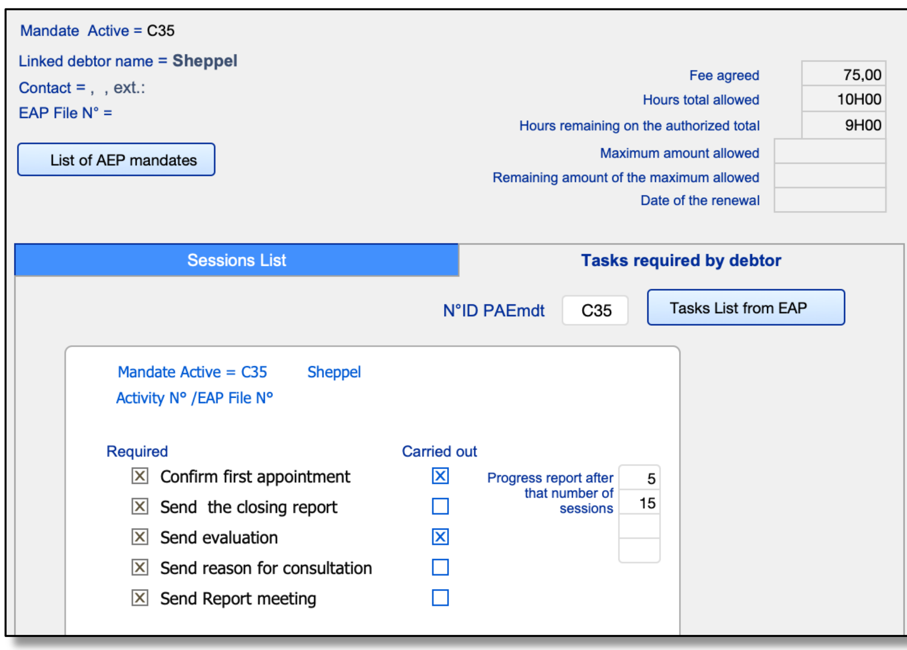
Addition of a list of tasks required by debtors, with selection and scoring of completed tasks;

Some debtors demand reports, reports, and when you have several clients with debtors, you must keep a list of what has been done or not. With BaseDPsy, you can now use EAP tracking to know what tasks are required and what tasks have been performed.

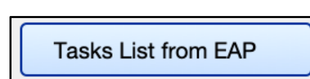
In the "Debtor" section, under the "Information & Preferences" tab, you select the tasks required by the debtor in the list. The list can be changed with the "M".

In the other sections, by displaying the tracking of the agreement with the debtor, a tab allows you to check and see what remains to be done for the debtor of the client.

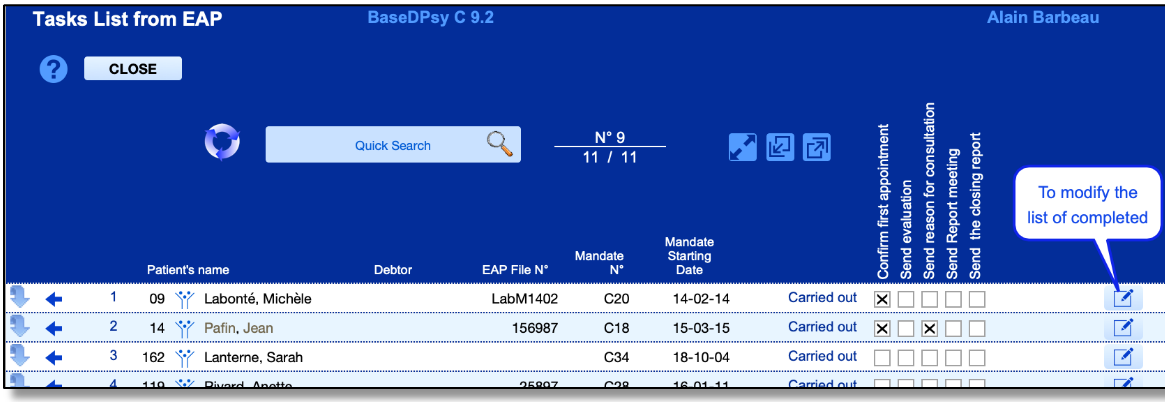




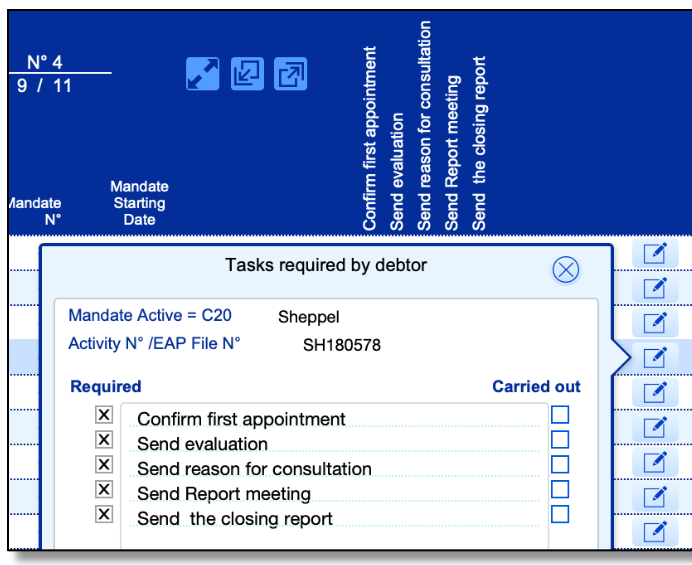
Another list is available in order to have an overview of the tasks of all the debtors you still have to accomplish.



When you click on the tool, a new floating window opens and gives you the desired information. Tasks are sorted by debtor name.



With this list you can quickly change the checkmark of tasks completed for multiple clients.



Templates from governmental EAP

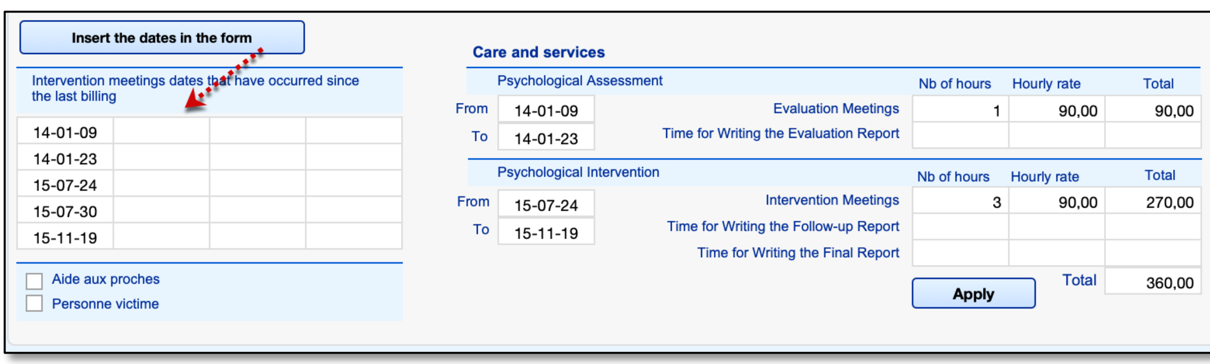
It is now possible to enter data in the billing forms of government assistance programs SAAQ, CSST, IVAC, directly with BaseDPsy.

We added three new models bills that are an almost identical copy of the forms provided by these agencies.
To comply, we also add the needed fields in the "Data" section

Under the "Coordinates" tab, we have added a field for the “Health Insurance N°”.

In “Data” section and the “Debtor linked” pane, under the tab "Mandate-EAP" we added the fields for: "Date of the original event," and "Date of recurrence, relapse or aggravation." This last field is visible only when there is an active mandate to the EAP client.

As the forms of CSST and IVAC are not like bills, but they are asking a summary of your billed services, a new model for editing the claim to these debtors was built, in which you have to fill some fields. Here is an example of the tables to be completed to complete the governmental forms:



But the other fields of the forms will be filled by BaseDPsy.

We also add a "History of billed services for the same client" so you can see in one place all the dates of the relevant services, not just those included in the claim to the debtor.

The CNESST billing form in BaseDPsy looks like this:

CNESST

COMPTE DE SOINS OU DE SERVICES DE PSYCHOLOGIE OU DE PSYCHOTHÉRAPIE
Santé et sécurité du travail

PC -

Identification du travailleur

Nom et prénom Lemming, Joan	*N° de dossier IVAC du client* 16-3987
Adresse	*Dates des rencontres d'intervention qui ont eu lieu*
Ville *Code postal*	*Date de naissance*
N° de téléphone *Ext*	*Date de l'évènement d'origine*
Sexe ☐ F ☐ M	*Date de récidive, rechute ou aggravation*

Renseignement sur l'identité du fournisseur

Nom et prénom Barbeau, Alain	
Adresse 816 Cardinal	*N° de permis* 11111
Ville Saint-Eustache, QC *Code postal* J7R 7B7	*N° de fournisseur*
N° de téléphone (514) 667-5775 *Ext*	*Individuel* 89745 *de groupe*

Identification du médecin qui a charge du travailleur (s'il y a lieu)

Ordonnance 3 ☐ Non ☐ Oui Si vous avez répondu oui, complétez.	N° de permis
Nom et prénom	Date de l'ordonnance

Évaluation psychologique

Soins ou services fournis 4		Description	Code	Nb d'heures 6	Taux horaire	TOTAL
Du		Rencontres d'évaluation 5	1301			
Au		Temps de rédaction du rapport d'évaluation	1311			

Intervention psychologique

Soins ou services fournis 4		Description	Code	Nb d'heures 6	Taux horaire	TOTAL
Du	2016-03-01	Rencontres d'intervention 5	1302	2	96,58	193,16
Au	2016-03-31	Temps de rédaction du rapport d'évolution	1312			
		Temps de rédaction du rapport final	1313			

		Sous-total	193,16
N° TPS	GC568493	Total TPS *	
N° TVQ	12342593405983467	Total TVQ *	
* si applicable (Code 1399)		TOTAL	193,16

Signature du psychologue

Je certifie avoir fourni les soins ou services indiqués ci-dessus

2018-06-18

BaseDPsy-R 9.0 **Facture N° : 36** Page 1

CNESST WEB 5008 (2017-02)

The IVAC billing form in BaseDPsy looks like this:

IVAC
Indemnisation des victimes d'actes criminels

Account of Services for Psychosocial Intervention

Information on the client's identity

Last Name, First Name: Brisson, Julie	IVAC File N° of the Client: 325498
Address	Intervention meetings dates that have occurred since the
City / Postal code	Birthday: 1978-02-17
Phone Number / Ext	Date of original event
Gender ☐ F ☐ M	Date of recurrence, relapse or aggravation

Information on the supplier's identity

Last Name, First Name: Barbeau, Alain		
Address: 816 cardinal, St-Eustache	License N°: 123456789	Professionnal Title: Psychologue
City / Postal code: J7R 7B7	Supplier N°	
Phone Number: (514) 667-5775 / Ext	Once a week	of group

Intervention meetings dates that have occurred since the last billing

2014-01-09			
2014-01-23			
2015-07-24			
2015-07-30			
2015-11-19			

Psychological Assessment

Care and services provided

From 2014-01-09
To 2014-01-23

	Nb of hours	Hourly rate	Total
Evaluation Meetings	1	90,00	90.00
Time for Writing the Evaluation Report			

Psychological Intervention

Care and services provided

From 2015-07-24
To 2015-11-19

	Nb of hours	Hourly rate	Total
Intervention Meetings	3	90,00	270.00
Time for Writing the Follow-up Report			
Time for Writing the Final Report			

Total free of GST and QST **360.00**

Provider Signature

I certify providing the care or services listed above

2015-12-01

BaseDPsy 7.3C Invoice N° : **23** 2015-12-01 Page 1

With a button in the editing area of the claim, you can transfer all dates of your service in the table named "intervention meetings dates that have occurred since the last billing". In this one too, you have only the lower tables manually fill inside BaseDPsy but having all the information in the same editing area of the claim.

The SAAQ billing form in BaseDPsy looks like this.

Société de l'assurance automobile Québec

Facture pour services professionnels - Programme d'aide au personnel

Nom **Barbeau** *Prénom* **Alain**

N° d'assurance sociale **123456789** *N° de permis* **12345678901** *N° d'entreprise du Québec*

Chèque libellé au nom de :

Adresse pour le remboursement
816 Cardinal, Saint-Eustache, QC, J7R 7B7

Téléphone **(514) 667-5775**
Courriel **alainbarbeau@basedcomm.com**

Description des services rendus

15-901	*N°ID* **02**	**2015/11/22**	**90,00 $**
Notre numéro de dossier	*Votre numéro de référence*	*Date*	*Honoraires par consultation*

Processus thérapeutique terminé ☐ *Maximum (1000$) atteint pour l'année* ☐

	Date du service	Heures facturées	Facturé	Total dû
	15/11/19	1H00	90.00	-90.00 $
	15/01/19	1H00	90.00	-90.00 $
	15/01/12	1H00	90.00	-90.00 $
Grand total en date du	**2015/11/23**	**3H00**	**270.00**	**-270.00** $

Facture N° : **29** 2015-11-23 1

The form from Secrétariat du Conseil du trésor (Québec)

HONORAIRES PROFESSIONNELS

Assurez-vous de fournir tous les renseignements demandés dans les cases appropriées en caractère d'imprimerie SVP - Merci.

PAYER À L'ORDRE DE (VEUILLEZ COCHER LA CASE CORRESPONDANTE):

**Faire le chèque au nom du Centre ou de la Clinique :*

☐ CENTRE / CLINIQUE :

\# NEQ : Numéro d'enregistrement d'entreprise

**Faire le chèque à mon nom personnel :*

☐ *NOM, PRÉNOM :

\# DE PERMIS : Membre de l'Ordre

*ADRESSE :

TÉLÉPHONE :

Ville

***N.A.S.**:

Code postal

DATE :

COURRIEL :

* Champs obligatoires

RENSEIGNEMENTS CONCERNANT LA PERSONNE AYANT REÇU LES SERVICES

NUMÉRO DE DOSSIER _ _ - _ _ - _ _ _ _

ENTREVUES DISPENSÉES

DATE	DURÉE	MONTANT PAYABLE PAR LE MINISTÈRE
	TOTAL DU MONTANT PAYABLE PAR LE MINISTÈRE	

*** PROCESSUS TERMINÉ** **Oui** ☐ **Non** ☐

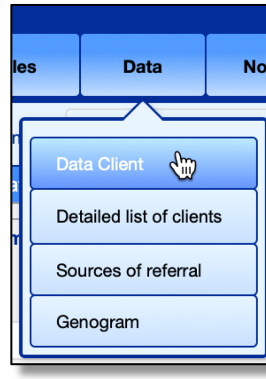
Transmettre votre facture à : **Madame Isabelle Garneau**

Par la poste : **Direction des services d'aide aux employés – PAE**
Secrétariat du Conseil du trésor
875, Grande Allée Est, 1er étage
Québec (Québec) G1R 5W5

Par courriel : **pae.sct@sct.gouv.qc.ca**

Par télécopieur : **418 643-0336**

20.2 Linking the debtor to the client, in "Files" section.

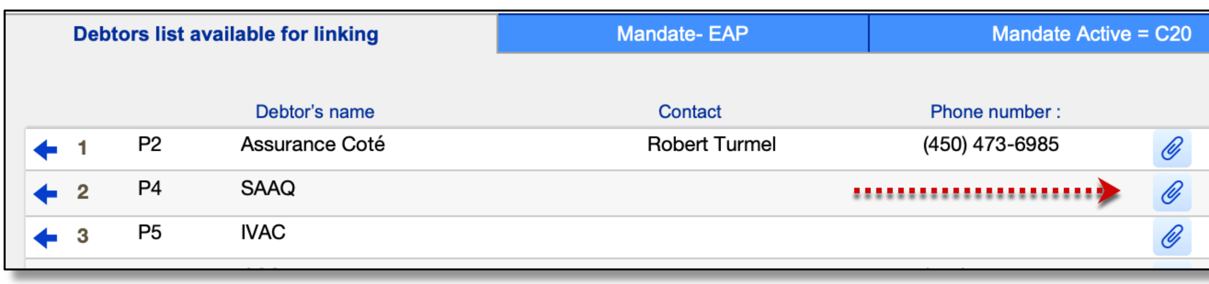


efore charging the services of a client to a particular debtor, the debtor must be linked to the client.

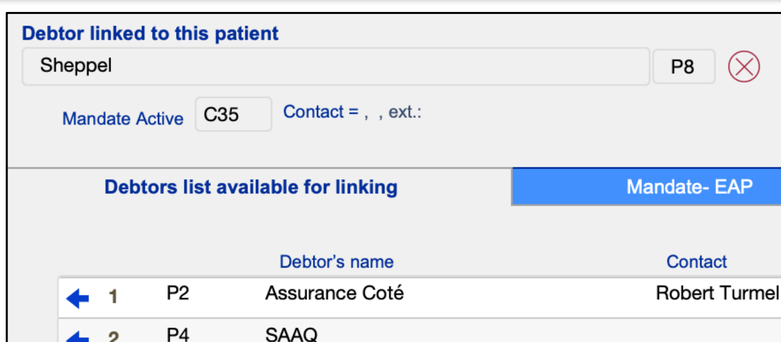
To establish the link between a debtor and a client, you must first have entered the information and preferences regarding the debtor in the "Debtor" section.

Once the debtor data is stored in the BaseDPsy, view the "Data Client" section and click to the "Debtor linked" pane.
In this pane, click again on the tab: "List of debtors available for linking".

Then, in the list, choose the name of the debtor which authorizes payment service your customer, and click the button in the form of "Paper Clip" to link the client and the debtor. This link is needed to enable all invoices that you will do for services to your customer (but paid by the debtor) are identified to the debtor



Clicking on the paper clip button, this gives this:

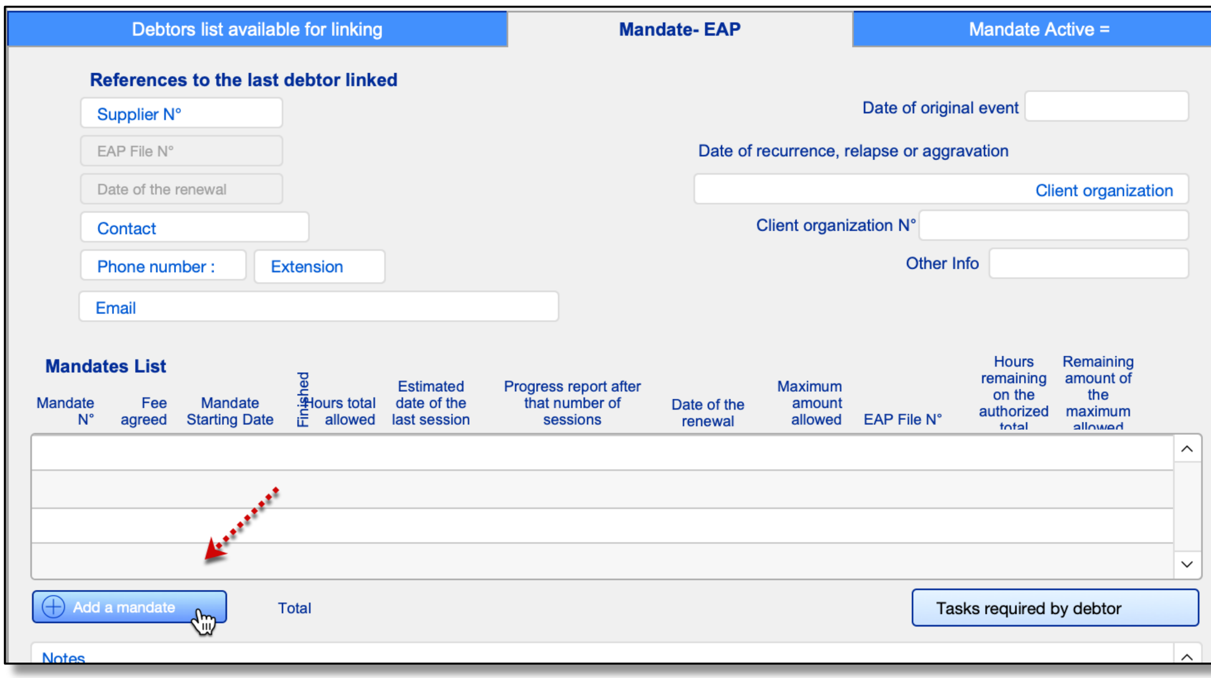


The next, very important and mandatory step is to register the mandate given to you by the external debtor.

20.3 Setting a Mandate-EAP in the Data-Client section

20.3.1 Setting the agreement with the debtor.

After creating the link between a debtor and your client, you must retain information of the agreement with the debtor. This services agreement paid by the debtor is named "Mandate" in BaseDPsy.



View the entries under the "Mandate-EAP" tab.

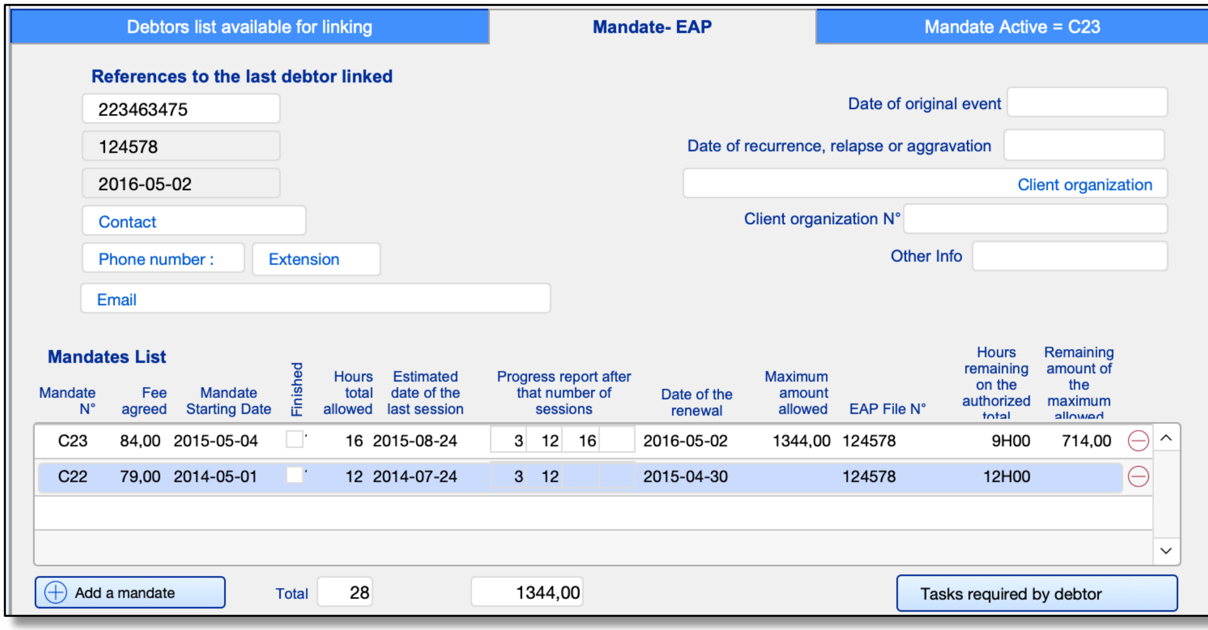
Then click "Add a mandate" to capture relevant information on the number of sessions paid, or the maximum amount of covered expenses and other data concerning the dates of the agreement, the Activity N° / EAP File N ° & Reference N°, the renewal date.

Attention: as the debtor's mandate number can be modified, always prefer the number inserted by the software. This number is always in the format "C00", if it is not in this format, contact us to repair it.

If necessary, you will also have to enter additional information on the client organization. Two other fields are available to supplement the information, if necessary: "Other info" and "Notes", the latter is situated in the list of offices.

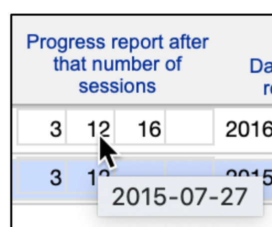
In the example below, we created two agreements in order to show that the last agreement created automatically becomes the "active Mandate" and that the previous order automatically becomes shaded in blue.

The list of appointments is sorted by the Mandate N° in descending order. So the last set, which is still active mandate, is always at the top of the list.



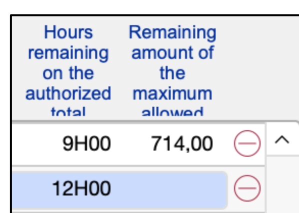
White fields are editable:
When creating a new mandate, the items are empty, so you must enter: the fee agreed with the debtor, the start date of the mandate, the number of hours allowed or the maximum amount allowed, or both, according to the agreement, the EAP file. The debtor's general fee (entered in the Debtors section) is added automatically when the mandate is created. However, it can be modified for each mandate.

You can also enter the pace of report on client evolution required by the debtor by inserting the N° session that serve as step cue to send a monitoring report.
Furthermore, after input a start date, leaving your cursor on the session N° under the label "Progress report after that number of sessions," you will see a tooltip displaying the corresponding date.



The date displayed is the number of weeks between the start date of the mandate and the date of the session N°, identified as a step to make a follow-up report.

The "Estimated date of the last session" also corresponds to the same number of weeks that the number of total hours allowed from the start date of the mandate, (a hour = a week). These dates will obviously be inaccurate if your pace is different of a session once a week.

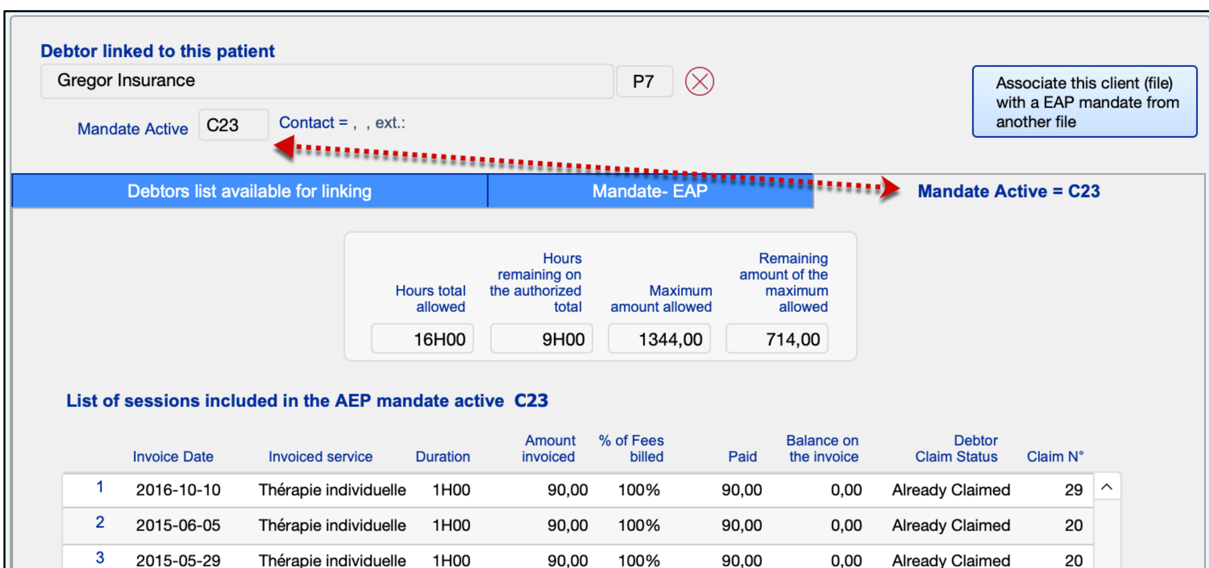


In the same list, you have two fields that indicate the progress of the agreement, the number of remaining hours and the remaining amount of the maximum allowed, as you entered or not the total allowed time and maximum allowed.
The red button with a "minus" is used to delete a "PAE Mandate". We suggest you use it only when you have created a mandate by mistake.

In the absence of the debtor linked to the client displayed, the content under the tab "Mandate-EAP" remains absolutely empty and blank. Once you linked a debtor client, the fields to be filled are displayed.

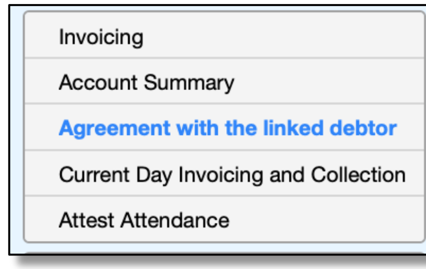
It is the same for the title of «Active Mandate =" tab. If you have not created any mandate, the title of the tab displays no number after the "=" and the tab displays empty sections.

This tab allows to follow the evolution of the mandate-EAP and how many sessions or what amount of money remains available under the agreement. It also displays information on whether or not you have already claimed these services from the debtor.



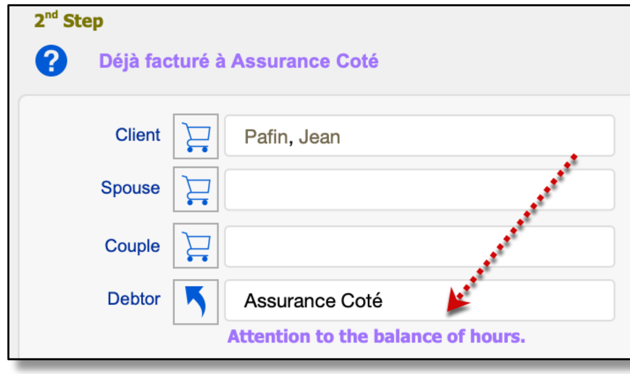
The (table) list of sessions included in the active Mandate-EAP is sorted in descending order of the date of invoice. The numbers before the billing date indicates the order and number of services, but do not indicate the session N°.

This evolutionary table of the agreement with external debtor is also present in the « Notes » and in the « Report » section. To view it, just click on the button « Agreement with the linked debtor ».

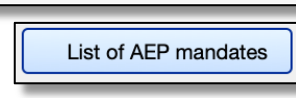


The display periods is now time format (HH-H-mm) and not in decimal format (0.00).

Also an alert is displayed when the number of remaining time is one (1) hour or less or when the balance of the total amount allowed is "150.00" or less.

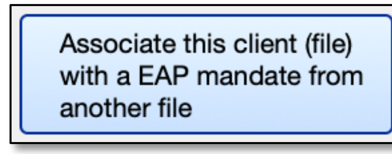


Fee agreed	84,00
Hours total allowed	16H00
Hours remaining on the authorized total	9H00
Maximum amount allowed	1344,00
Remaining amount of the maximum allowed	714,00
Date of the renewal	2016-05-02



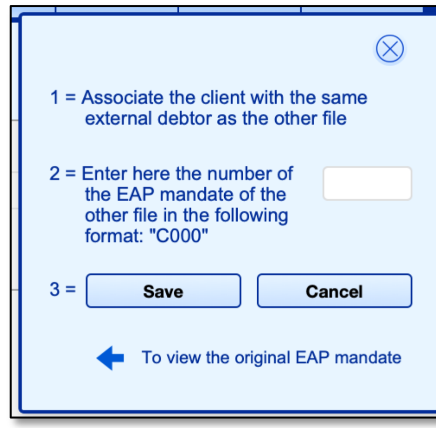
A button allows you to display all the mandates of all external debtors in a single list. It is available in the "Data" section on the toolbar and in the other sections inside the "Agreement with the linked debtor" pane.

20.3.2 Mandate of debtor associated with several files



When you create multiple linked files, such as a couple file and another file for each spouse, it may happen that the couple's sessions and the individual sessions with each spouse are paid by the same debtor.

We have therefore created tools to link several files to a single debtor mandate.



You must first associate the three files to the same debtor, but you create an EAP mandate for only one of the three files. You note and copy the created PAE number, then display the other two records, and save the same Mandate N°.

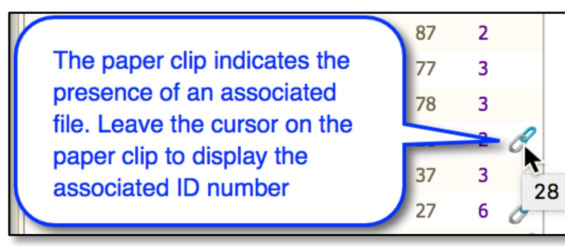
When entering a PAE number in the field for this purpose, make sure that the number is in the format "C00"; i.e. a capital "C" followed by two or more digits.

Subsequently, all sessions billed in either of these files will be assigned to the same mandate, and in the " Agreement with the linked debtor" window of either will have the same information.

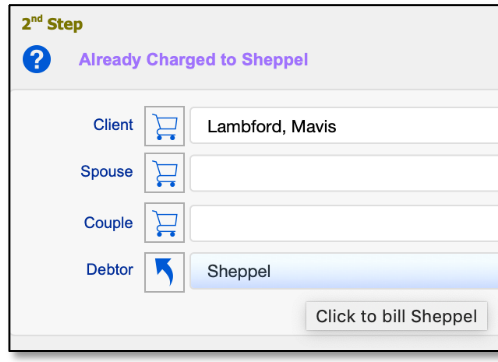
However, only the folder in which you created the PAE mandate will have information detailing the mandate. But, we have also created a tool to display this folder from other related folders.

If the main folder changes to an active PAE Mandate, you will then have to revisit each associated file, use the "Cancel" button, then add the new PAE (Active Mandate) number and click save.

Whenever you save a link between two folders for the same PAE mandate, the procedure also adds a linked file indicator in the clients list with the addition of the paper clip icon, and adds the Customer ID N°. in "Linked files" under the "Family" tab.

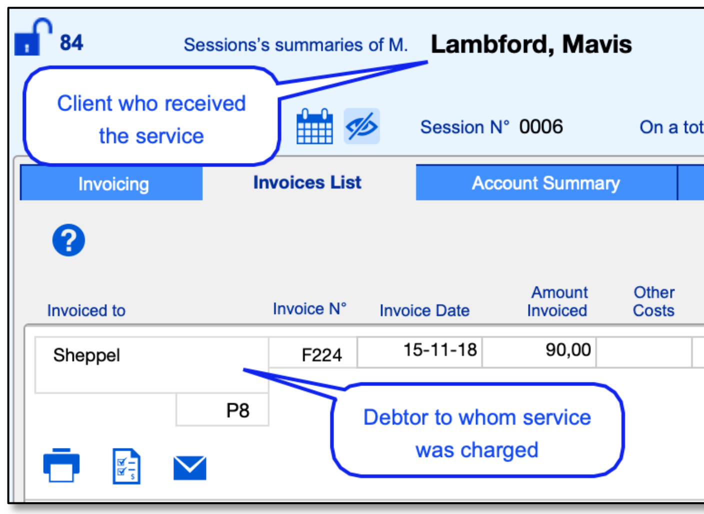


20.4 Record a transaction at the expense of the debtor

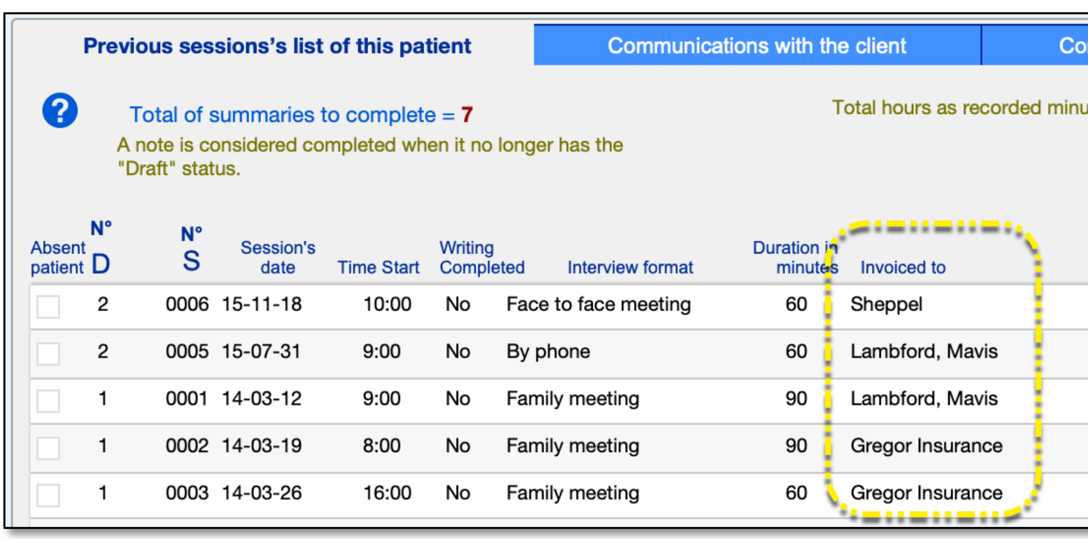


In the invoicing section of the Notes or Report, you save an invoice by clicking on the name of the debtor, as seen previously in this manual.

It is also possible to change the debtor during therapy. Just before charging the session to go to the " Data Client " section under the debtor tab and change the name of the linked debtor.

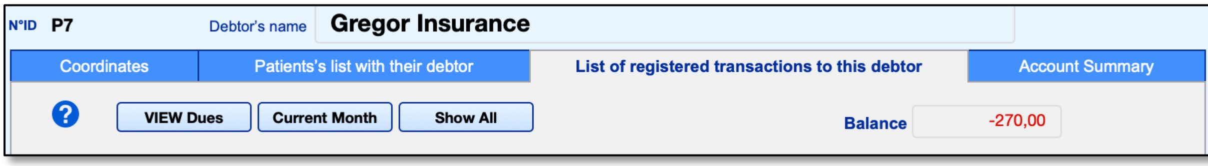


For example, a history that witnessed



20.5 Make an invoice to the debtor (print and mail a claim for payment).

1. At first, you can check the number of transactions that have not been claimed within

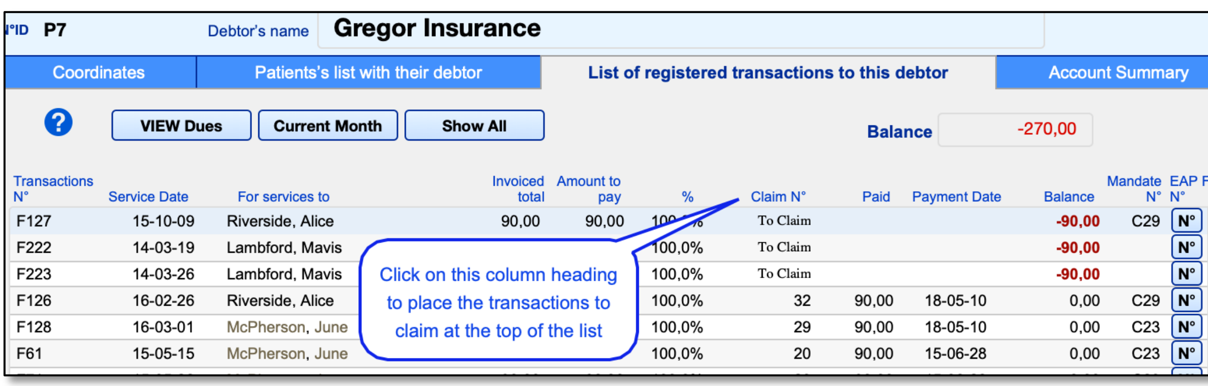


specific invoices to the debtor, displaying the table under the "List of registered transactions..." tab in the interface of the debtor.

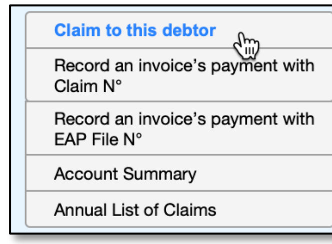
When you display the list of transactions or claims to the debtor under the tabs, in principle all transactions and claims will be displayed. Otherwise, use one of the filters at the top of the interface to choose the display criteria.

The balance of the transactions not yet billed is displayed in the list of transactions as well as in the account summary.

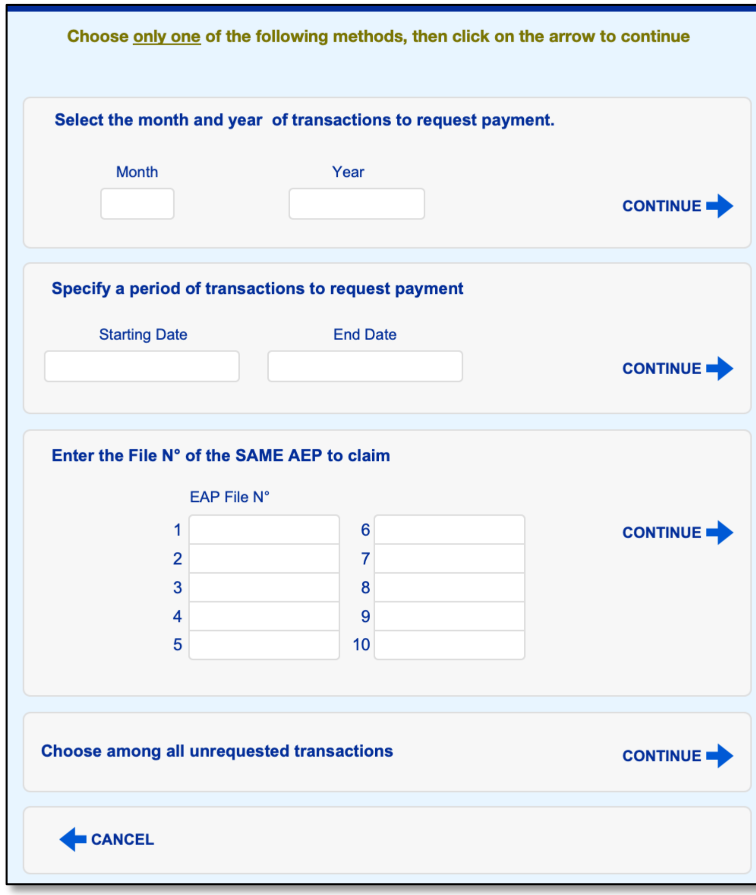
In the list of registered transactions, transactions not yet recorded in a claim to the debtor (or not yet billed to the debtor) are identified by the words "To claim"; those already claimed are identified by a claim number (or invoice number)



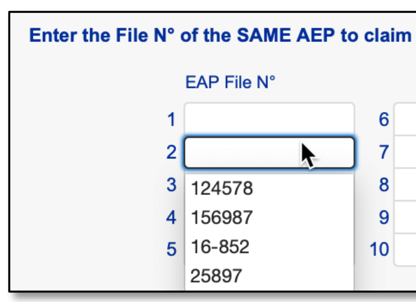
2. Then use the button « Claim to this debtor».



The procedure displays an interface to choose the dates of the transactions that you want to claim the debtor you.



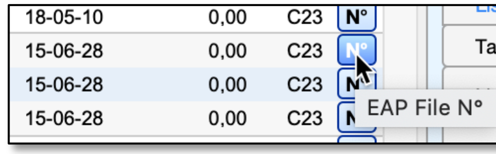
By clicking on one or the other blue arrows of different choices, the procedure displays in the ledger only transactions not yet claimed to the debtor that was displayed at the start of the procedure.

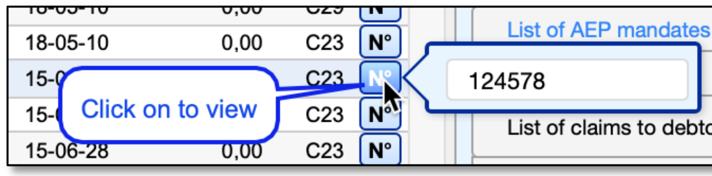


It is also possible to make a claim using the "PAE File Number" instead of the dates.

Clicking on the field displays a drop-down list.

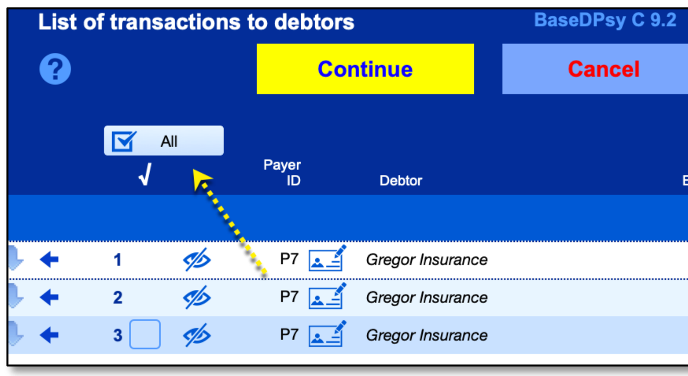
In order to remember the PAE file numbers to be used during the claim procedure, we added a tool in the transaction list.





3. In the next step, two method choices are available to you.

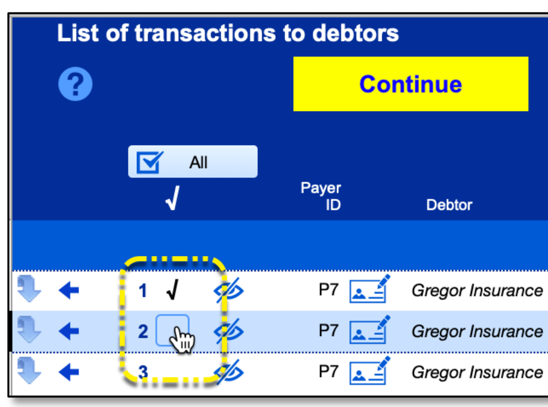
Examine the transactions displayed, and if all transactions have to be included in the bill (claim) to the debtor, then you can click the "All" button.



By clicking on the button "All" , the procedure will be automatically closed and you will be conducted rapidly in the debtor interface.

If certain displayed transactions should not be portion of the claim to the debtor that you are about to print, you need to choose the ones to be included in the claim to the debtor.

You choose the transaction to claim to the debtor by checking the corresponding box at the left of the row.



After checking one by one the concerned transactions, click the "Continue" button at the top of the interface.

You can also cancel the current billing procedure by clicking the "Cancel" button (not shown here).

In the next step of the procedure, the bill claimed to the debtor appear on the template you chose for this debtor. You still have to print and ship.

Space is provided at the bottom of the invoice to be signed by you. The display in the header of the invoice is dependent on your choices in the "Options" tab and under "Printing / Container / Invoices " tab.

Clinique Paix de l'Esprit

Alain Barbeau M.A.
Psychosociologue
1857 St-Laurent Montreal M7H 3M8
Phone number : (514) 667-5775
Fax number :
License N° :
N° TPS :
N° TVQ :
alainbarbeau@basedpsy.com

Supplier N°: 223463475

Claim
Invoice N° : **20**
on 2015-05-05

Gregor Insurance
5841 Boul Notre-Dame, Montréal, Qc, CA, J7M T8R

EAP File N° : **124578**

The therapeutic follow-up of that person continues.

Invoiced	Absent patient	Service Date	Duration in minutes	% of Fees billed	Invoiced	Balance
Autres frais						
Individual Therapy			1:00	100%	90.00	
Amount to pay		2015-05-15			90.00	0.00
Other Costs						
Session			1:00	100%	90.00	
Amount to pay		2015-05-22			90.00	0.00
Other Costs						
Session			1:00	100%	90.00	
Amount to pay		2015-05-29			90.00	0.00
Other Costs						
Session			1:00	100%	90.00	
Amount to pay		2015-06-05			90.00	0.00
Cumulative amount at 2017-06-06					**360.00**	**0.00**

Alain Barbeau

Check payable to : Your name or your company name

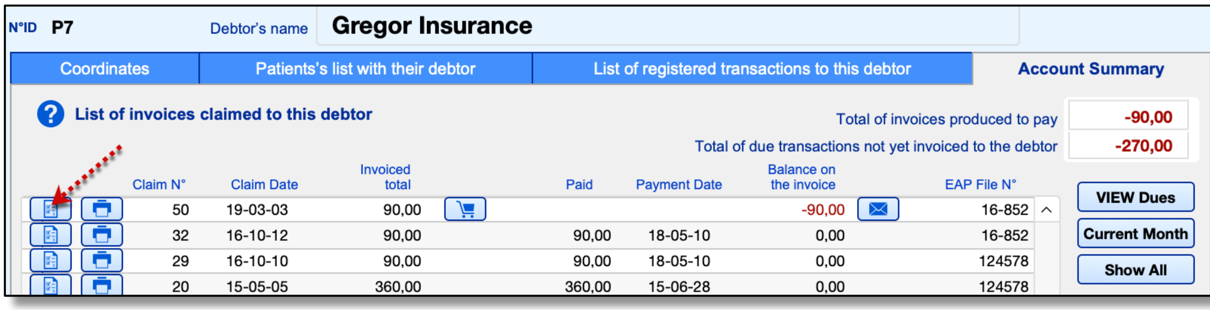
2017-06-06 1

20.6 Check the list of services claimed to the debtor.

If your printed claim to the debtor is not close to hand, you can always check which transactions were included in the claim for payment to the debtor.

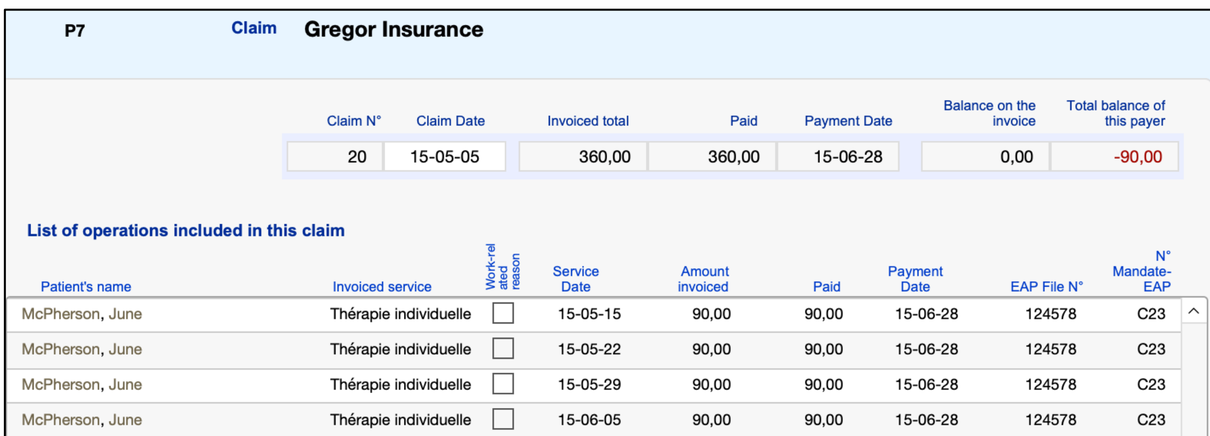
To do:

1- Go to the debtor section, see the table under the "Account Summary" tab.

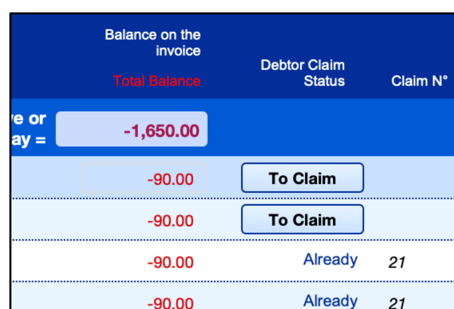


2- Click the invoice-shapped icon in the row.

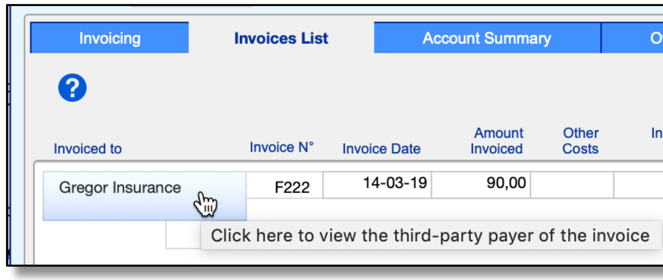
3- A new interface will appear with the list of claimed services and other details. You may also edit and reprint as needed.



Also included in the general ledger interface, a reminder of the billed to a client services whose was claimed or not claimed to a debtor in the column: Status of billing the debtor.



20.7 Record the receipt of a payment from an external debtor



Go to "Debtor" section

A hidden button allows you to view directly the debtor of a client from the "Notes" section by clicking on the name of the debtor. It is located in the table under the tab "List of invoices…".

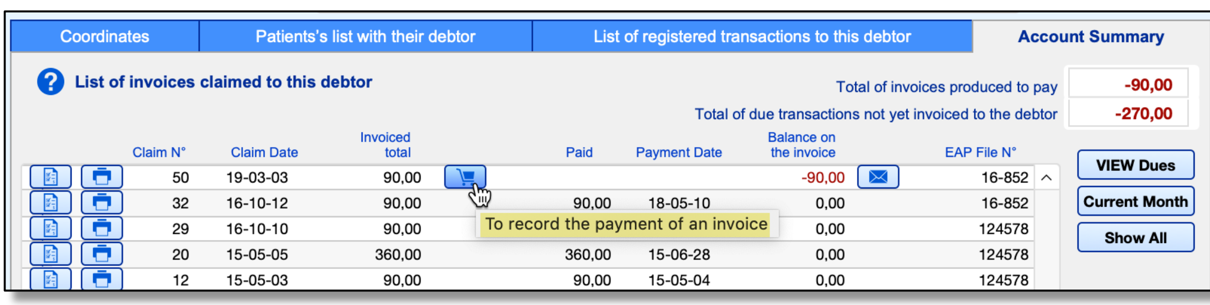
But you can also use the button back-shapped blue arrow.

Or use the tool in the drop-down menu of "Finance" at the top of interface.

Two methods are available.

Method by claim number

To record a payment from a debtor, you must display the summary account and click on the cart-shapped button in row with the relevant invoice.

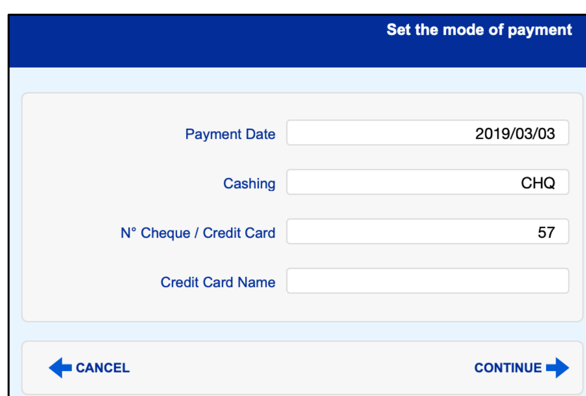


The "Record an invoice's payment with Claim N°" button is only a reminder of this method.

By launching the payment process on the part of a debtor, you are led into an interface designed to capture data on the mode of payment.

It is important to fill 3 or 4 fields of this interface.

But you can see that there is no field to contain the amount of the payment made by the debtor.

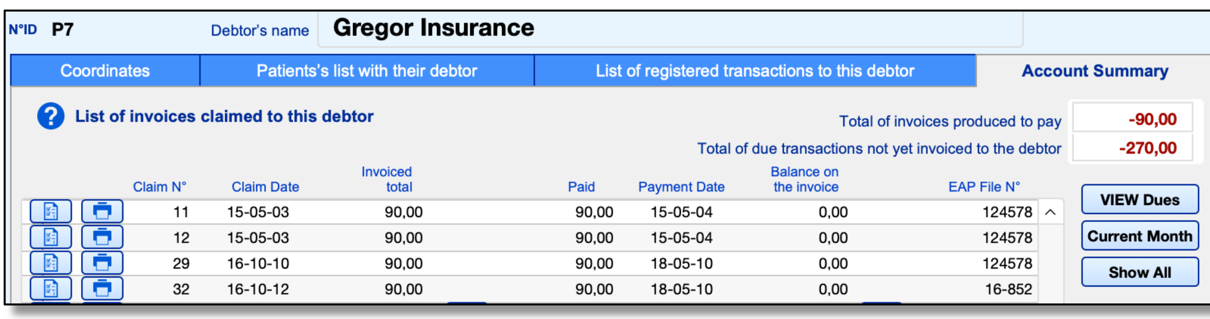


This is not necessary because the procedure will simply pay each of the client invoices that have been charged to the debtor.

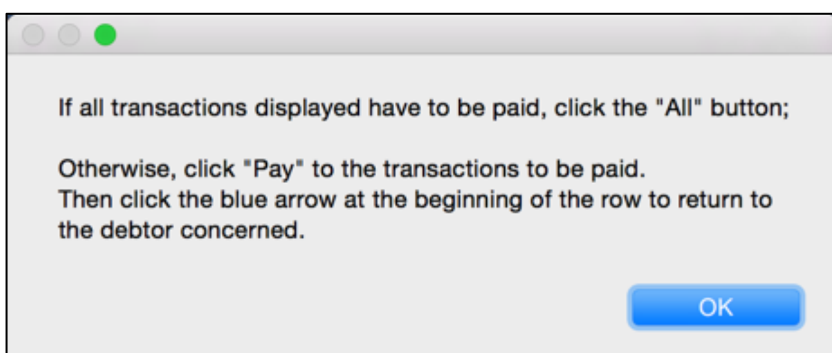
After entering the information on the payment method, you are led into the interface to record payments on customer services that were charged to the debtor.

Pay attention to the following message because the procedure will be different depending on the choice you make. The message asks if you prefer to choose transactions one by one to manually record them as paid or if you prefer that all transactions found be automatically saved as paid.

<u>If you click Automatic ",</u>
the procedure automatically records the payment of all transactions included in the claim and then redisplays the account summary.

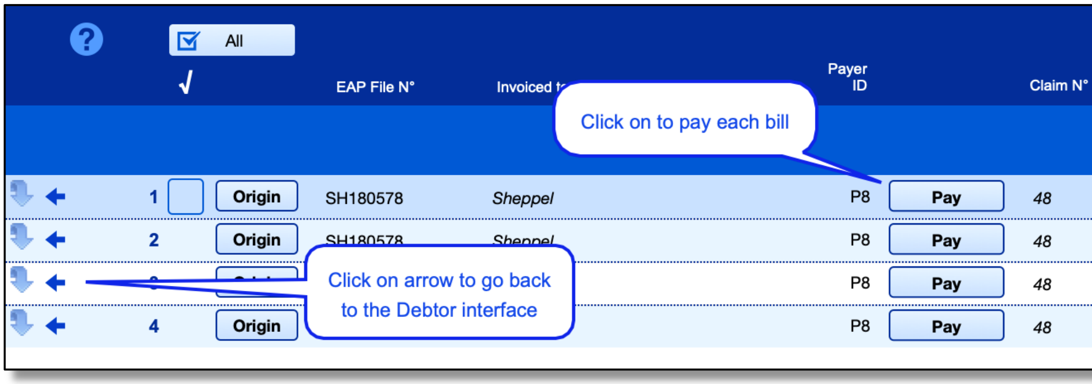


<u>If you choose "Select"</u>, the next step will show another message reminding you of what you will need to do later to record the transactions as paid.



Then the procedure isolates the transactions included in the claim number that you have previously identified, and you only have to choose which transactions you will use the "Pay" tool to record the payment.

When finished, click on the arrow to return to the relevant debtor section.



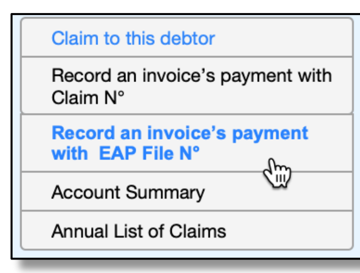
By clicking on "All", the payment procedure will write data in all payment transactions displayed, and return you to the debtor's interface.

If you click the button "Pay" for each of the displayed transactions, only transactions selected by you will be affected by the payment procedure.

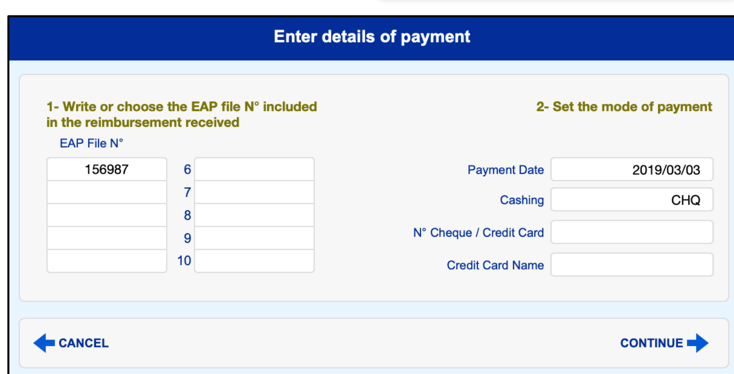
The procedure enters the date of payment, the cashing kind, the number of the check and the amount due in the amount paid.

If you entered payment transactions one by one, click on the blue arrow in the row to go to the debtor account summary, or click on the "Origin" button to return to the Notes section and view the notes of the client concerned, or a button on the header to go to the section of your choice.

Second method: By the EAP file number



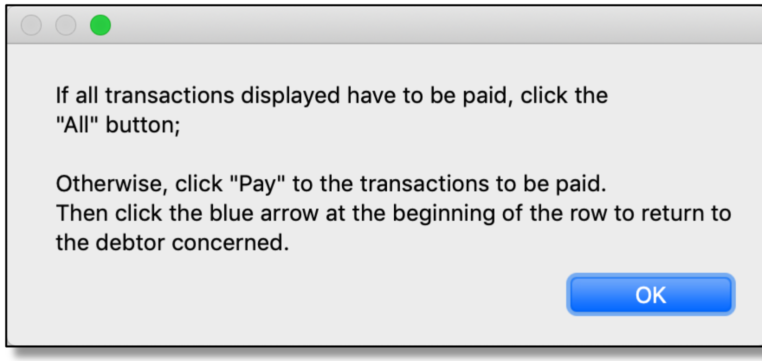
The second method does not use an automatic procedure because it displays all transactions with the same EAP file number, and so you will have to choose which transactions in the claim has been paid by the debtor.



A window is displayed in which you must enter the AEP File N° to search for and the payment method.

After entering the payment method information, you are taken to the interface to record the payments on the customer services that were billed to the debtor.

A message reminds you of the next step.

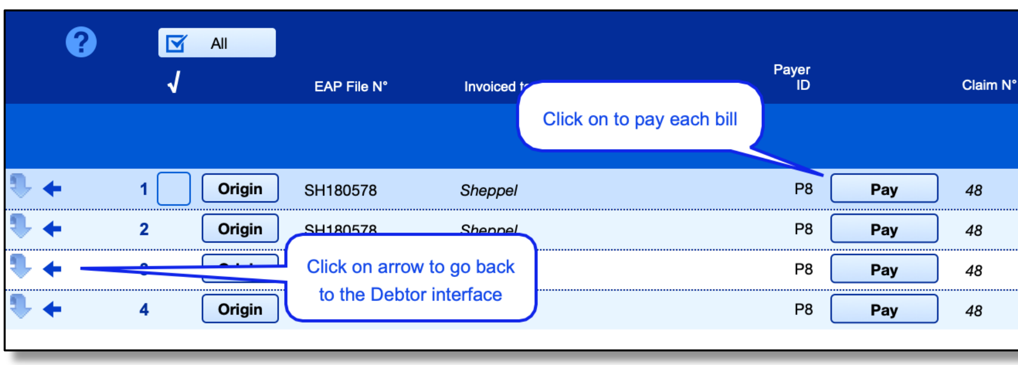


By clicking on "All", the payment procedure will enter payment data in all displayed transactions, and will take you back to the debtor interface.

If you click the "Pay" button for each of the transactions displayed, only the transactions chosen by you will be affected by the payment procedure.

The procedure enters the date of payment, the method of payment (cashing), the number of the check and enters the amount due in the amount paid.

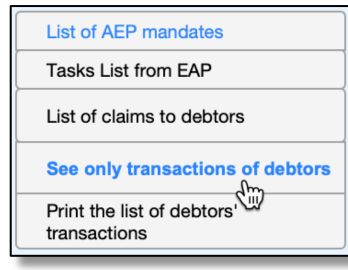
If you have entered the payment of the transactions one by one, you click on the blue arrow at the beginning of the line to return to the debtor's summary or click the "Origin" button to return to the Notes section and display the notes of the customer concerned or click on a header button to go to the section of your choice.



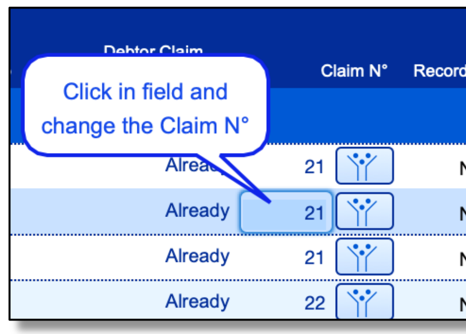
20.8 Correction's needs in claims (invoices) to debtors

20.8.1 Issue N° 1

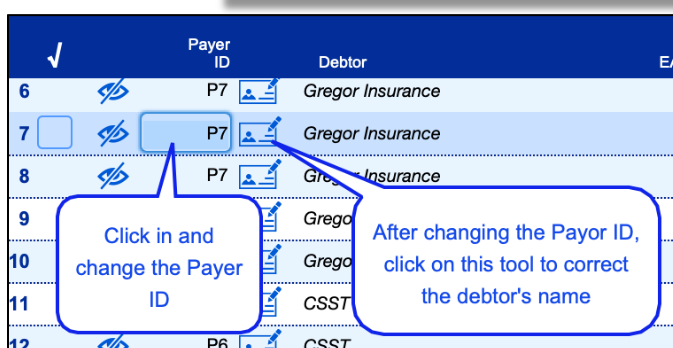
A transaction is included in a claim to the debtor, but it is not charged to the correct debtor, nor in the correct invoice number!



Solution:
Display the transaction in the Debtor Transaction List and:



1. Select the transaction row in the list of transactions linked to a debtor and: Edit the invoice number the debtor: click the Claim Number and change it;



2. Edit the Payer ID No.: click in the field of the payer ID, always keep the "P" in front of the number;

3. And then click the button to adjust the name of the debtor to the payer ID.

4. View the account summary of the debtor and the tab named "List of registered transactions to this debtor" to make sure that the change meets your expectations.

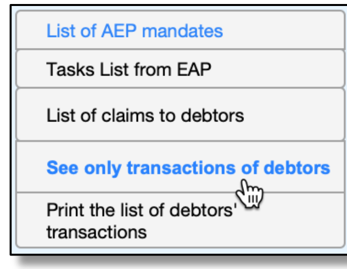
5. If this did not solve the problem, then you can try again the solution 1 or use the solution of the situation 2.

20.8.2 Issue N° 2

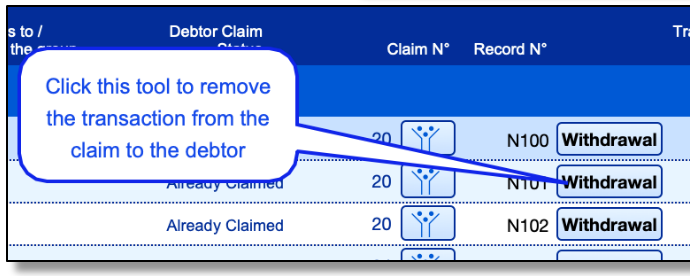
A transaction was charged to the bad debtor

Solution :

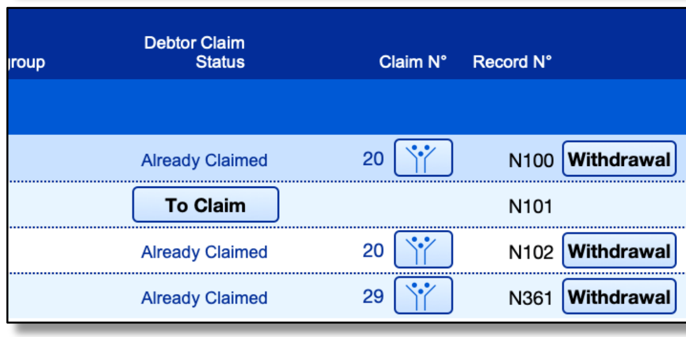
1. See list of transactions the debtor,



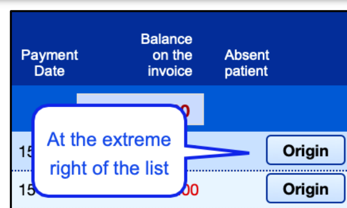
2. Select the row of the transaction in question, and click the "Withdrawal" button;



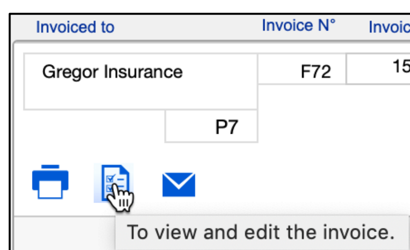
The status of the claim changes after clicking on the "Withdrawal" tool.

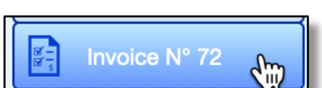


3. Then, click the button « Origin » to display the Notes section where you charged the debtor.

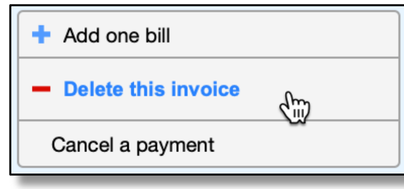


4. Under the « Invoicing tab, and under the tab named: List of invoices for this session », click the button to display the invoice of your patient; You can also use the "Finance" drop-down menu button to display the invoice.

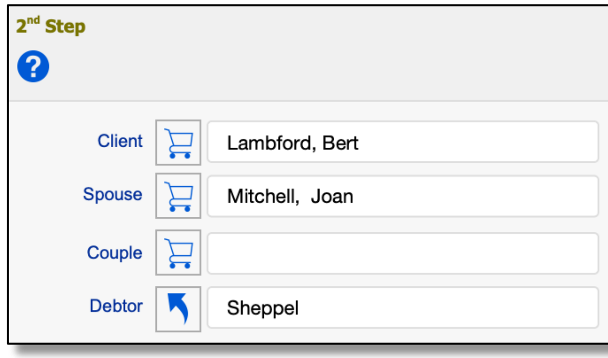




5. There, use the button to delete the invoice;

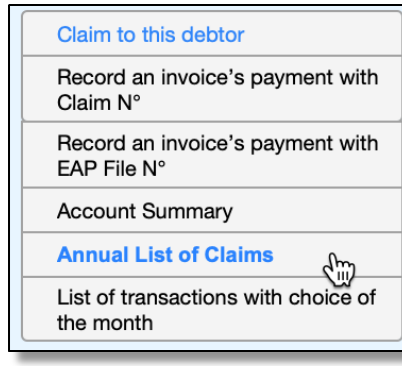


6. Come back to the Invoicing tab in the « Notes » section and make a new transaction charged to the correct debtor.

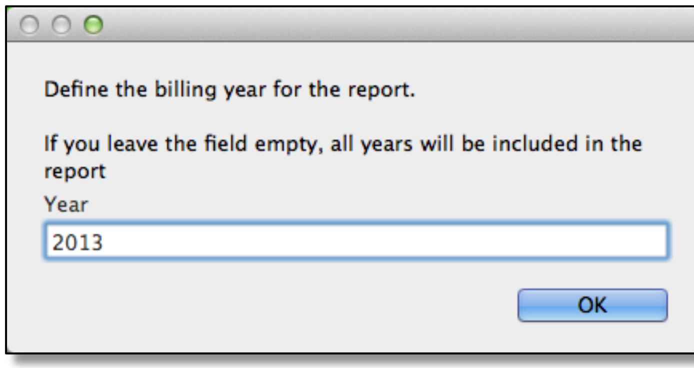


20.9 Annual statement for debtor or Annual list of claims.

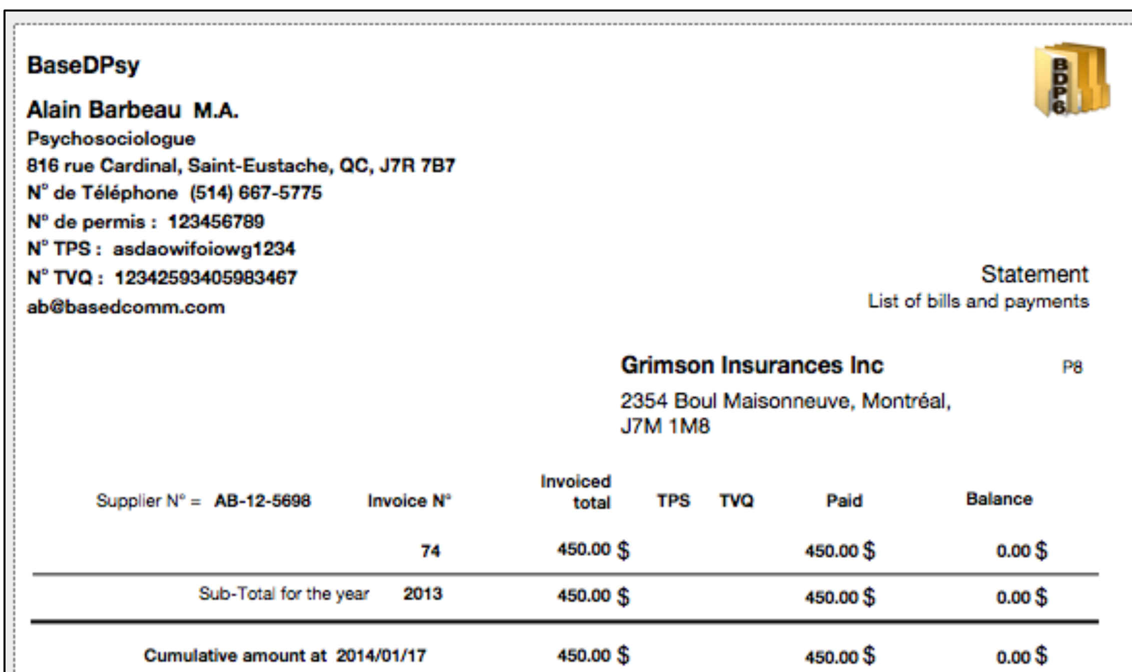
For debtors, only one model is available. The designation of the tool is also more specific.



The procedure asks you to choose only the reporting year.



And displays the result in preprint. The list contains only the data concerning the debtor in the foreground.



BaseDPsy

Alain Barbeau M.A.
Psychosociologue
816 rue Cardinal, Saint-Eustache, QC, J7R 7B7
N° de Téléphone (514) 667-5775
N° de permis : 123456789
N° TPS : asdaowifoiowg1234
N° TVQ : 12342593405983467
ab@basedcomm.com

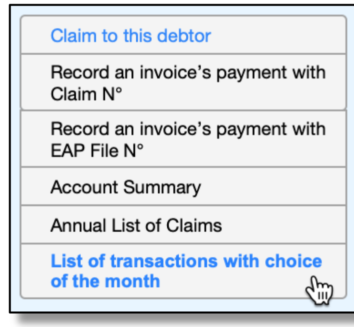
Statement
List of bills and payments

Grimson Insurances Inc P8
2354 Boul Maisonneuve, Montréal,
J7M 1M8

Supplier N° = **AB-12-5698**	Invoice N°	Invoiced total	TPS	TVQ	Paid	Balance
	74	450.00 $			450.00 $	0.00 $
Sub-Total for the year	2013	450.00 $			450.00 $	0.00 $
Cumulative amount at 2014/01/17		450.00 $			450.00 $	0.00 $

20.10 List of transactions billed to debtor with choice of the month

This list, unlike the previous one, contains the transactions of all debtors.

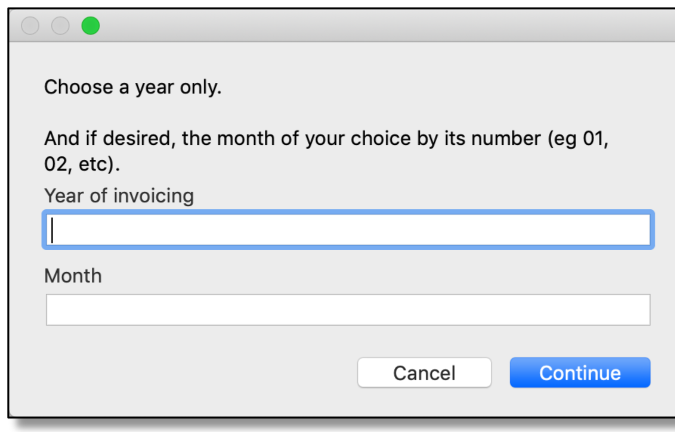


The procedure offers you to choose a year date and a month of this year. Thus you can see in a single list all transactions charged and paid to all your debtors in the same month of the year.

If you do not enter any date in the year or month, the list will contain all your transactions since you started using BaseDPsy. If you enter a year without the month number, you will have all the transactions of the year.

The list is sorted by year, month, and debtor name.

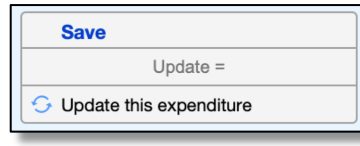
The procedure also allows you to export the list in Excel format.



Transactions list / Debtor

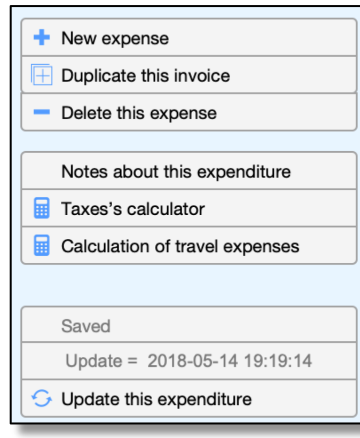
Debtor	For services to	Invoice N°	Invoice Date	Amount invoiced	TPS	TVQ	Amount to pay	Paid	Payment Date	Balance
			Totals	**3,665.00**	**4.50**	**8.98**	**3,678.48**	**1,603.48**		**-2,075.00**
2013										**-90.00**
décembre										**-90.00**
Assurance Coté										**-90.00**
P2 Assurance Coté	09 Labonté, Michèle	F190	13-12-10	90.00			90.00			-90.00
2014										**-600.00**
mars										**-180.00**
Gregor Insurance										**-180.00**
P7 Gregor Insurance	84 Lambford, Mavis	F222	14-03-19	90.00			90.00			-90.00
P7 Gregor Insurance	84 Lambford, Mavis	F223	14-03-26	90.00			90.00			-90.00

21. Registering your expenses



Saving expenditures is necessary if you want to generate your annual financial statements with BaseDPsy.

This is a relatively easy step. After creating a new expense using the button to do this, you enter the details of your invoice and you click the "Save" button.

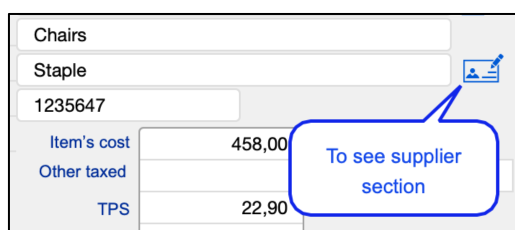


Once the expenditure recorded in the ledger, some changes on the displayed buttons and notices remind you that it has already been registered.

You will see by the presence of buttons to modify the list of values of four fields. You will definitely want to use them to customize budgetary and subcategories budget items.

The button, next to the item to enter the name of the supplier, the dealer of the item for which you made the expense, let you add names to the list.

You can add the name immediately in the popup window, and complete vendor information later. To display supplier in the supplier interface, click the Provider ID N° in the row (N° start with a "V").



We recommend that you always create a file for each of your suppliers. This allows to not make a mistake in the wording of their name and, therefore, to have compilations on spend per supplier that are not divided into several wording of the same supplier.

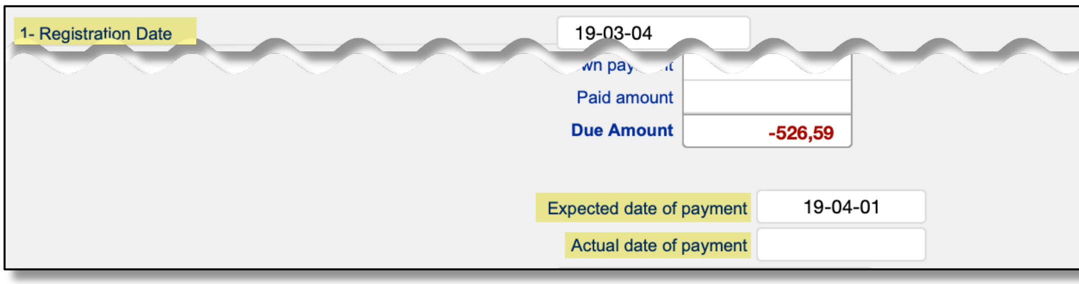
If you want later change the content of a paid invoice, for example, you made a mistake in the number of the check, you must use the tool "Update this expenditure" to copy the changes in spending recorded in the Ledger.

21.1 Register an account payable (Invoice due)

In the "Expenses" section, there are three dates that have different uses:

Registration date: this is the date on which you enter the expense information
Expected date of payment: this is the date of a future payment, later than the date on which you entered the expense information, this is also the heading in which the dates of future recurring expenses will be entered.

Actual date of payment: to use to enter the date of a payment that has taken place, because it may happen that you register in BaseDPsy an expense that is already paid at the time of registration.

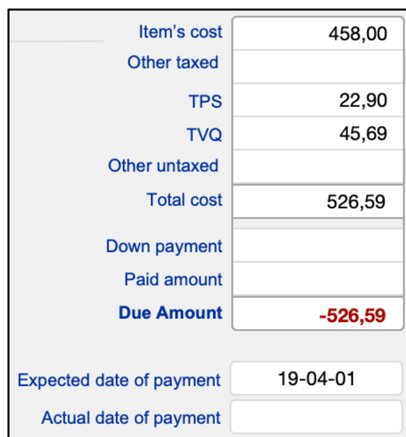


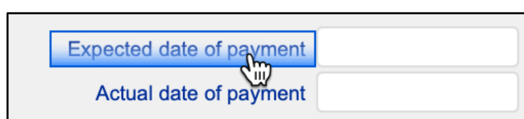
An account payable is a debt that you plan to clear at a later date and you want to have a reminder. This is an expense that requires action on your part to make the payment.

In BaseDPsy the reminder of accounts payable is in the form of a list that you will find in two places: either in the "Expenses" section under the "List" tab, in the "Dashboard".

For an expense to be identified as an account payable in BaseDPsy, you must not have entered an amount under the heading "Amount paid" and you must have entered a date in the "Expected date of payment".

By clicking on one of the field titles: "Expected date of payment" and "Actual date of payment" you will be able to enter in their respective field the registration date of the expense.





Payment provided by credit card

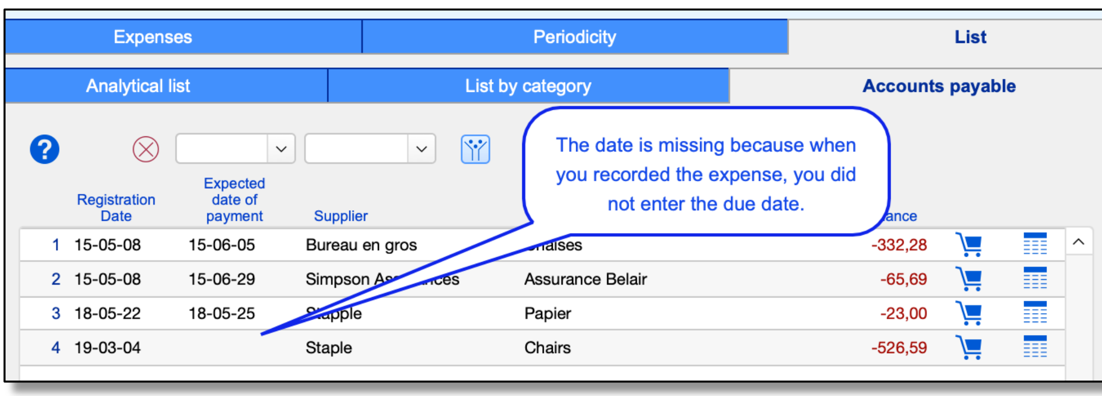
When you enter an expense that will be paid by credit card, you do not really need a reminder to make the payment. In this case, it is preferable to enter the amount paid and the actual date of payment, even if the payment date is later than the date the expense was entered. The expense will not be in the list of accounts payable.

That's why, in the regular expense planning tools, you have a question "Is the payment automatic? ". If you answer yes, the expense will not be included in the list of accounts payable.

List of accounts payable

The list of accounts payable only shows expenses for which the "Amount Paid" does not equal the "Amount Due". However, you can filter the list according to the "Scheduled Payment Date" by year and month.

It also contains tools to quickly save the payment or to view the ledger.



If an account does not display the due date, the date has not been posted to the ledger. Make sure the date has been entered in the "Expenses" section and then use the tool to update the expense.

In the Dashboard, you also have a list with two tabs: one to display the accounts payable for the current month and the other to display all accounts payable.

21.2 Periodic or recurring expenses

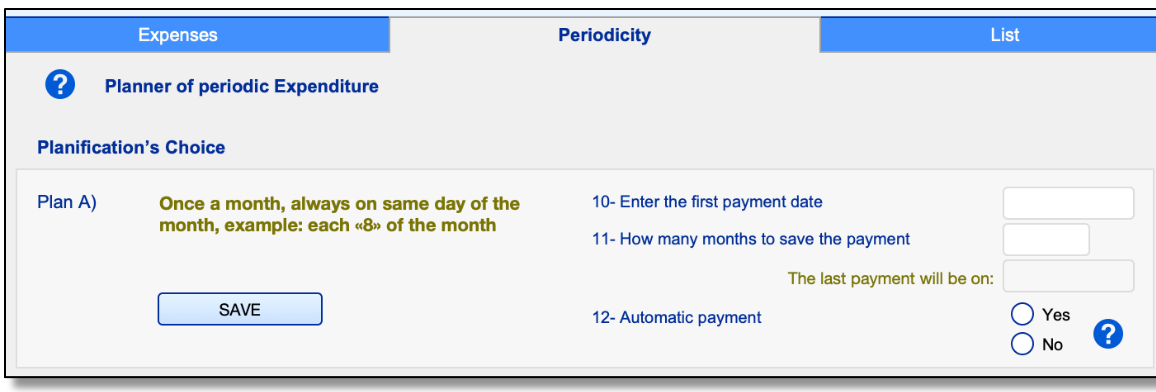
In the top of the interface, you observe the presence of 3 tabs. One called "Periodicity" allows you to record in advance the recurrent expenditures.

For example, you want to avoid entering the monthly rent check for your office, especially since you gave a series of dated checks to your landlord.

First you have to enter the details of the expenditure under the "Expenses" tab. This is why the number of steps in "Periodicity" begins with "10", following those under the previous step. Then you go under the "Periodicity" tab and choose one of the three available methods.

In the case of rent, you will probably choose the method "A" by registering for example, January 1 for the date of the first payment, then 12 in the number of months to repeat the first expenditure, if of course, you want to pay a full year ahead.

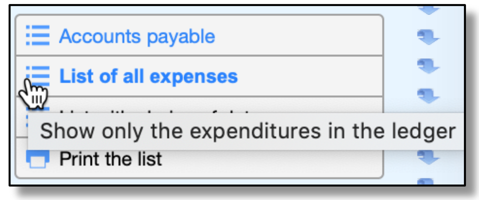
You can also click on the title of the step "10 - Enter the first payment date" to copy the date of payment that you previously recorded under the "Expenses" tab.
And verify that the date in "The last payment will be on:" corresponds to the date you planned.



Then you click the "Save" button under the planning choices "A". When displaying the list of expenses to the general ledger, you also find that 12 payments were added and the initial check number was incremented by 1 for each monthly payment.
There has therefore a condition to increment the check number : the term used to describe the method of payment must be one or other of the following wording: « CHQ », « Chèque », « Cheque », « Check ».

Each method has its own planning "Save" button, because each has a different loop procedure for creating the expenditures.

When you use the "Save" button in one of the planning formulas, you do not need to use the "Save" button under the "Expenses" tab.



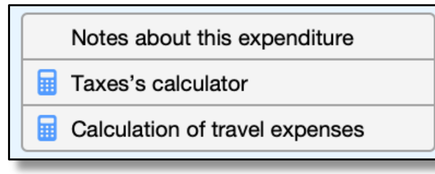
You can check the accuracy of the series of expenditures recorded by clicking on the button named "List of expenditures in the Ledger". The procedure will isolate all expenditure recorded in the general ledger

If you then click on the word corresponding to the item of your spending (purchased item), then, the 12 payments for renting that you just created will be isolated from all other expenditures.

This is the advantage of displaying in the Ledger: it allows to isolate a series of expenses.

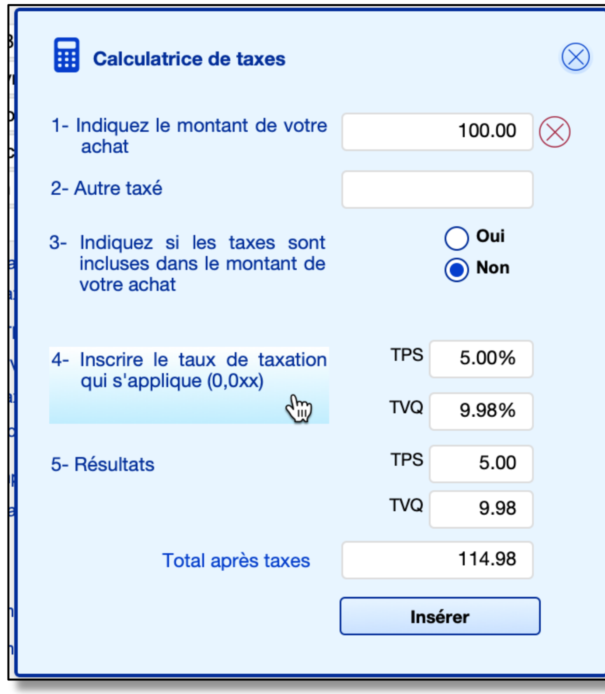
The list with date choice allows you to create a printable list that will contain only the expenses included between two dates of your choice
The list contains only the saved expenses.

21.3 Calculators



You will find two tools that accelerate the calculation of taxes or travel expenses.

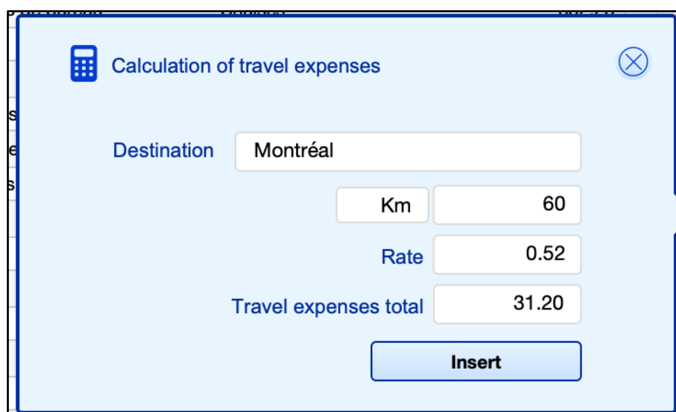
The tax calculator is automatically displayed when you attempt to enter the amount of the expense.



In one or the other calculators, the "Insert" button, copy the result of the calculation in the sections of matching costs under the "Expenses" tab.

Before using it, it is imperative that you have created a new expense, otherwise the click on inserting will have the effect of suppressing the details of a expenditure already registered.

About the Tax Calculator, it is good to know that you can insert the tax rates (entered in the "Options" section) that apply by clicking: either on the title of step 4, or on the name of one or the other of the taxes.



The insertion rate works only if you have first entered these rates in the relevant fields in the "Options" section, under "Finance" tab.

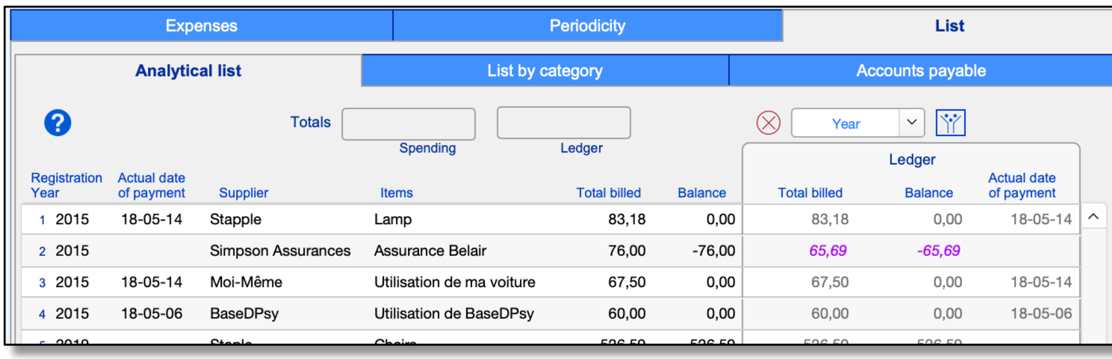
The particular usefulness of this calculator is to find the tax amount of a purchase when the bill does not explain the proportion of costs related to taxes.

For travel spending, the title of the "Km" can be changed to "Miles" by clicking. The rate must be entered in decimal. The "insert" button inserts only the total costs in the amount paid field.

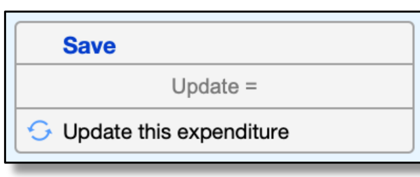
21.4 Expenses list under tabs

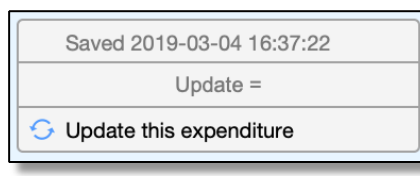
In the "Spending" section, displaying the "List" tab, you will find three sub tabs, respectively entitled "List by category", "Anlytical List" and “Accounts payable”.

The expenses shown in these lists are only those that you created in the "Spending" section. When you record an expense, the process copy the information contained under the "Expenses" tab in a new record in the "Ledger" section.



Therefore, you have two buttons for the recording of expenses: either "Save" and "Update this expenditure", plus another button to see the list of expenses recorded in the general ledger.





Under the list tab in the "Spending" section, so it's expenses created before registration in the ledger that you can view.

For each of these two lists, the content can be sorted by clicking on any of the column headings.

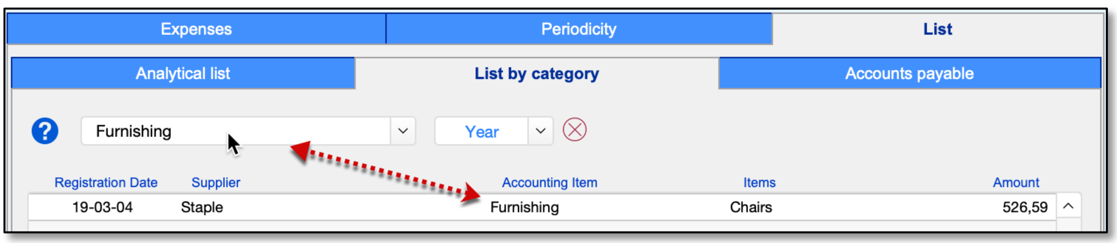
21.4.1 List by category (Budget headings)

Under the « List by category » tab, the list display only the expenditures according to the following two criteria: either the budget row and the year of the date of the expenditure.

The list of budget items can be edited directly in this section or by going to the "Options" section.

By clicking on one of the expenses in the list, the details of the corresponding expense will be displayed under the tab "Expenses" (Content).

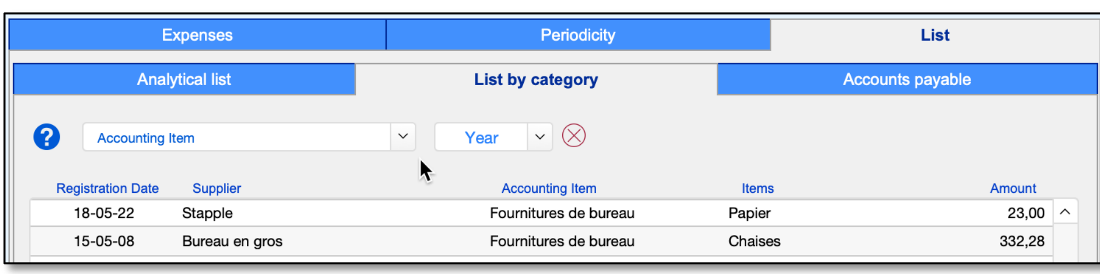
On the "List by Category" tab, a table displays the list of expenses corresponding to an identical term in the "Budget item" heading.



When the filter items (Budget Item, Year) are blank, all the expense forms created in the section are visible in the list.

If you enter content in one or both fields, the list will only show the expenses that match those criteria.

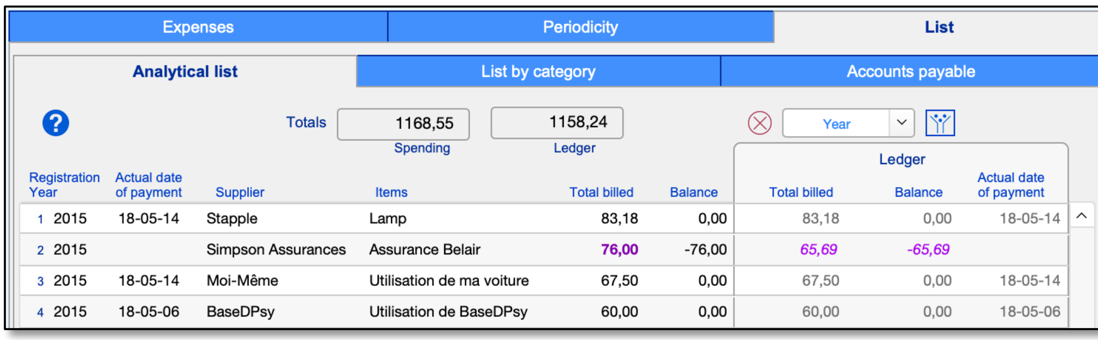
In addition, by clicking on a row of the table, you display the corresponding expense under the "Expenses" tab.



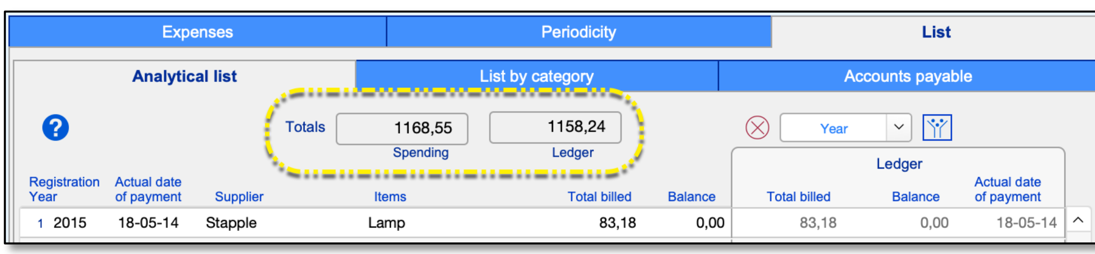
21.4.2 Analytical List

The analytical list can be very long, by clicking on "Payment Date", the latest expenses will be in top of the list.

The list displays two sections: the dark information on spending are from the "Expenses" section, and the other information displayed in gray color are from the "Ledger" section.
If there is a difference between the total ledger invoice and the Expenses total, the color of the different total will be fuchsia color. Same color, if the payment date differs



Another gap index between the two sections is a difference between the totals of billed expenses. If the Ledger total is greater than the total of "Expenses", this means that you have cleared an invoice in the expense section that is still present in the General Ledger section. It's the Big Book data that counts in your financial reports.



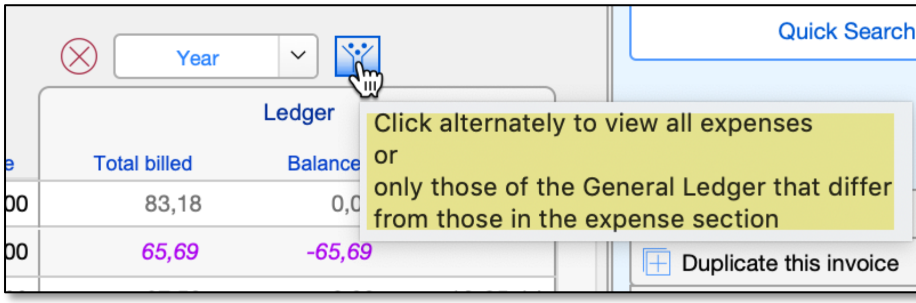
The presence of these two sections will allow you to check the consistency between recorded in the Ledger information and those created in the "Expenses" section.

For example, it may happen that we forget to record an expense, in which case the fields that reproduce the information recorded in the general ledger will remain empty here.

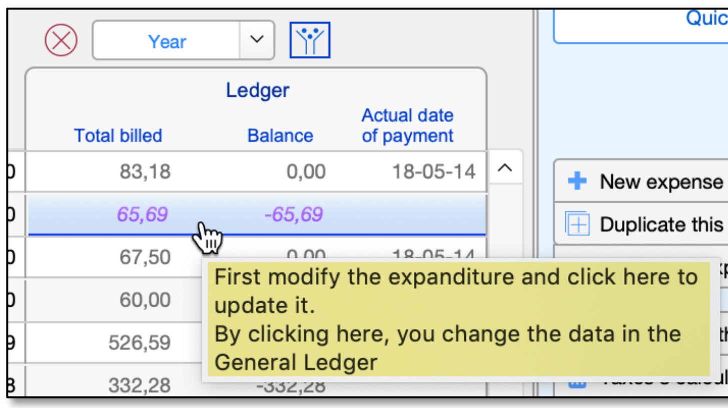
It may also happen that you change an expense after recording. In this case, if you forget to use the "Update this expenditure" button, there will be a discrepancy between the figures of the expenditure in this section and the figures of expenditure in the Ledger.

As your financial reports are produced with the information included in the Ledger, it is important that the consistency between the two sections are maintained.

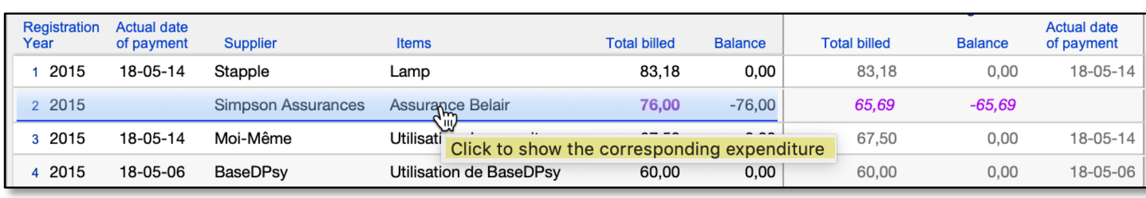
Since the list can display a large number of items over time, a tool saves you from looking for gaps, just click on the tool with a sort icon to display only items with a difference between the "Expenses" section and the General Ledger.



To save you time, you do not need to go under the "Expenses" tab to update, ie copy the changes of the expenditure section in the Ledger. Click on the amount field showing a gap to update the expenditure in the Ledger.



If you click on a field of the sections displaying the information in the spending section, the details of this expenditure will be shown in the foreground.



22. Financial Reports

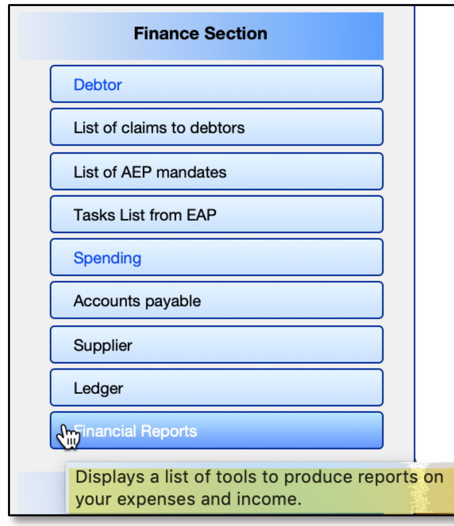
The financial report section allows you to generate statistics on revenues and expenses of your professional practice. Account statements and invoices to customers are not included in this section, since the tools to produce them are already present in other sections of BaseDPsy.

In the section of financial reporting, there are 25 different tools which allow you to produce tables on your finances, plus 8 other tools to visualize in graphical mode, if and only if you use FileMaker Pro or FileMaker Go to run BaseDPsy.

In this section you will find the tools to know:

- The total of your annual expenses by budget items or otherwise;
- The annual totals collected and paid taxes;
- The total of your income using different criteria (date, year, month, location, employer, etc.)
- Your annual results.

22.1 Annual Results



For the annual balance or the financial results of the year, two tools are available:

1- Start printing procedure of Annual Balance Sheet (N° 17) in the section of financial reports (Menu/ Financial Reports);

2- Show only transactions of the same year in the Ledger.

Annual Balance Sheet

Make sure your billing dates are in the same financial year as the dates of services.

The last three tools of the list offer you three ways to view your annual results.

One draws a statement showing a column for income and a column for expenses, ordered according to your budget items.

This table is displayed after you have chosen the year or period that interests you.

With BaseDPsy operating alone (that is to say with Runtime) on a computer, the picture appears in "Preview" mode; with FileMaker Go on iPad, the preview mode is not possible, the interface is displayed in "Browse" mode.

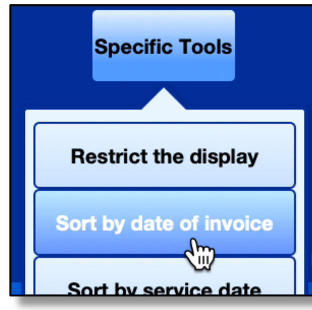
Annual Outcomes from Clinical Services on 2015

Taxes are not included in these totals

		Income	Expenses	Profit
	Individual Therapy	180.00		
	Report	150.00		
	Session	360.00		
Total	Income	690.00		
	Formation		60.00	
	Furniture		357.00	
	Rent payment		58.00	
	Travel Expenses		67.50	
Total	Spending		542.50	
	Totals	690.00	542.50	147.50

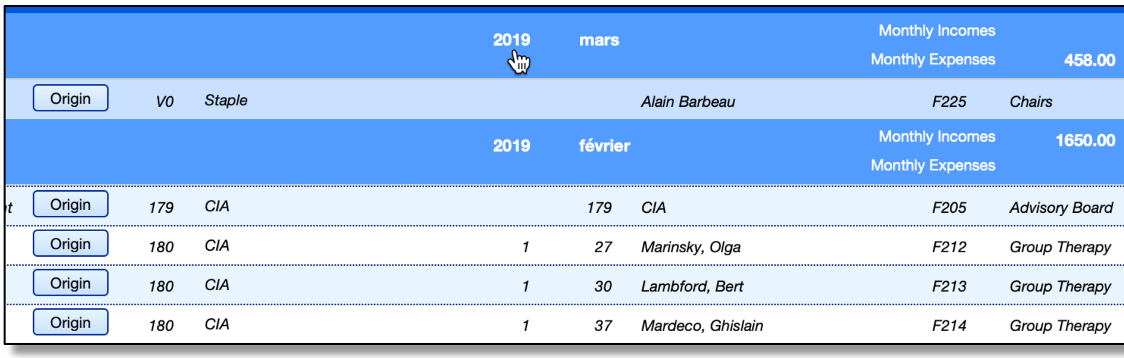
With the iPad, you must click "Continue" to see the next step, which is printing, and then return to the section "Financial Reports". If you cancel printing and the following of the procedure, a button allows you to return to "Menu" of BaseDPsy. The tool at footer of iPad allows you to choose the interface back.

Transactions sorted by year in the Ledger



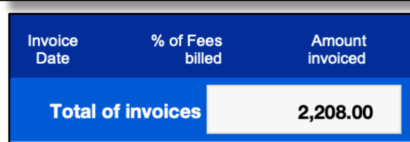
The other method is to use the ledger to see the annual balance.

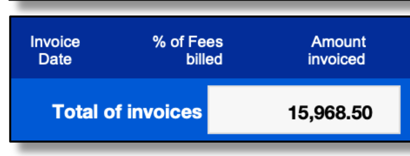
1- View ledger;
2- Click "Show all";
3- Click the tool in « Specific Tools » to sort by date of invoice;
4- Click on the year you are interested to isolate transactions of the selected year.



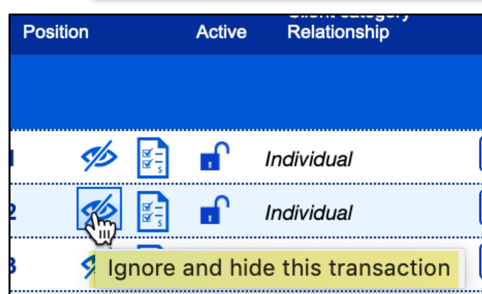
In the header of the ledger, two summaries are available :

- the balance of the fiscal year: total revenue minus total expenses, and this result will be referred to as gain or loss depending on the positive or negative sign of the balance.





- The difference between the invoiced amounts and the amounts collected. But do not forget that the amounts invoiced included expenses (which are also bills paid by you). This summary is not valid as the annual balance sheet. It is true that if you isolate a client's income; or if you hide (ignore) expenditure.



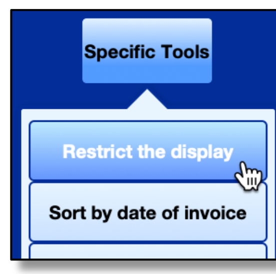
If you do not isolate the transactions of a particular year before consulting this balance, the result will always be indicated for all displayed transactions. Both balances still vary depending on the displayed transactions.

Selective Display

After several years of using BaseDPsy, the total of transactions recorded in the general ledger can easily reach several thousand transactions, making it more difficult to read.

In addition, you do not necessarily need to see all transactions at each opening of the General Ledger, which is why we have added an option that allows you to control the length of the transactions displayed. This option is found in the "Options" section under the "Finance" tab.

Four options are available: a) no choice means that all transactions will be displayed; (B) transactions during the last three months; C) those of the last 6 months, d) those of the current year.

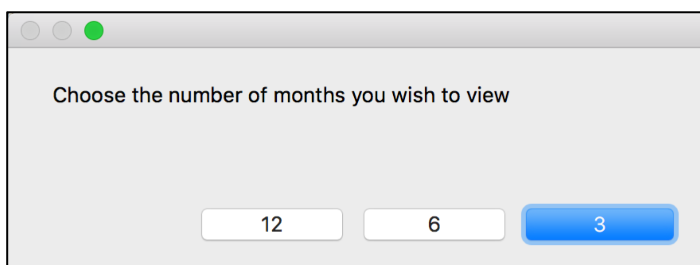


"Last months" means the most recent months.

The display of the General Ledger is now conditioned by one of these four options.

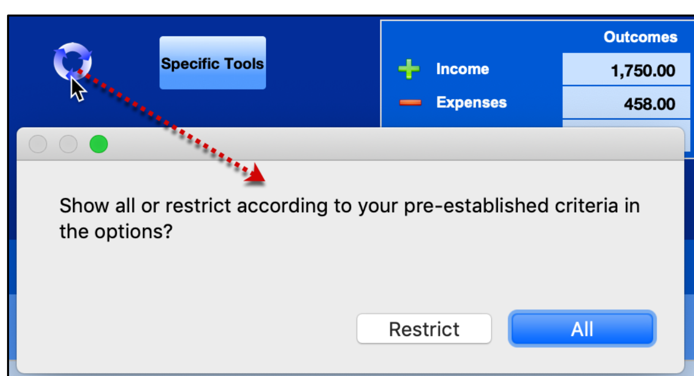
In addition, to avoid strolling between the General Ledger section and the "Options" section to change the criteria, we have added this option to the "Specific Tools" in the General Ledger.

The tool name is « Restrict the display».



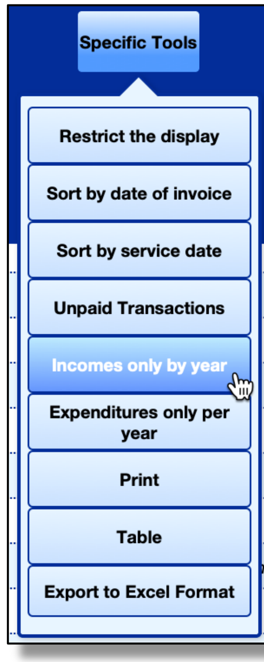
When you click on it, it displays a dialog box asking you how many months you want to display.

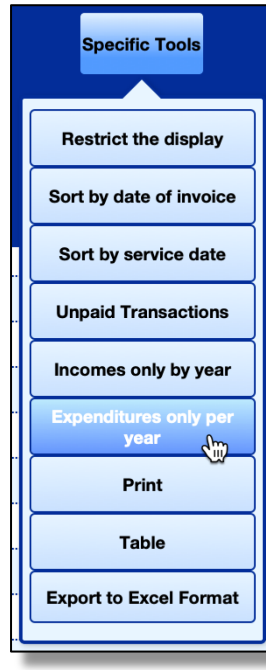
Clicking on the "Show All" tool opens a dialog box asking you whether you want to display everything or apply your usual criteria.



View revenues or expenses

Two new tools have been added in "Specific Tools", one for displaying only revenue and the other for expenses only. But each procedure allows you to display the year of your choice.





We also added information in the monthly totals line when you chose to sort transactions by billing date or service date.

You will now see the monthly sub-total of the amounts invoiced and of each tax.

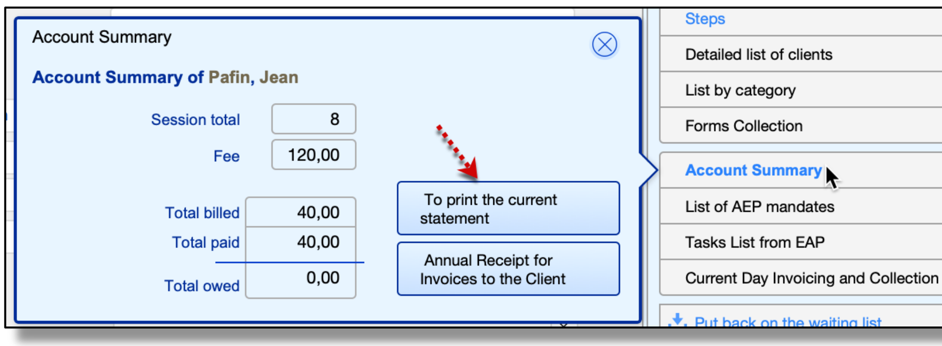
Service Date	Service Cost	Invoice Date	% of Fees billed	Amount invoiced	Other Costs
				octobre	2018
18-10-15	*75.00*	*18-10-15*	*100%*	75.00	*Autres frais*
18-10-08	*75.00*	*18-10-08*	*100%*	75.00	*Autres frais*
18-10-01	*75.00*	*18-10-01*	*100%*	75.00	*Autres frais*

22.2 Monthly statement

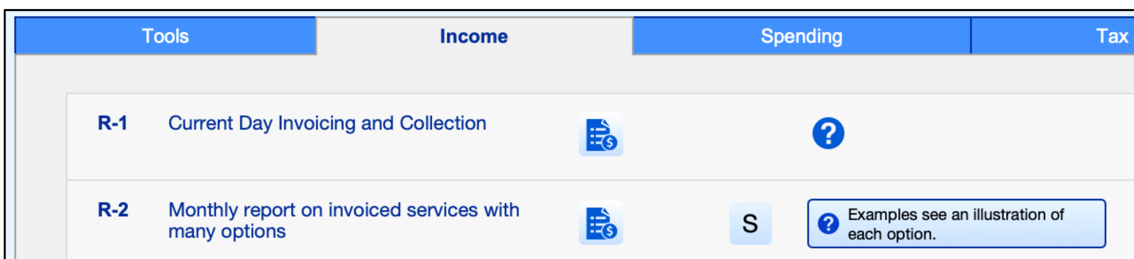
There are three methods to obtain monthly statistics about your income or transactions with your clients.

The first one is to use the button : « To print the current statement».

This tool is available in the « Account Summary » in "Notes" section and in the "Data Client" section. The result is fast when you first display the client concerned before use. The procedure will ask you for what month and year and other details, then will display all transactions charged to the client, identifying the person to whom the service was billed.



The second method allows you to further refine your search. Go to the "Financial Reports" section, then use the "Monthly report on invoiced services" button.



One of the buttons produces a report based on the invoice date, the other depending on the date of service invoiced.
To avoid different results, we recommend that you always write the date of service as invoicing date to the customer.
This tool allows you to view the transactions of the month with or without a filter.

If you click on the first "Continue" leaving empty additional choice of "Date" and "Year" button, the report will then show all transactions for services.

Otherwise, many filters are available: like by category of service, according to the service recipient, (or group therapy), or who paid the service, etc..

A tool is also available to let you know the meanings of the filters.

The third method is to use the "Ledger" and isolate the monthly transactions that interest you, then click on the "Print" button in the header of the Ledger. This option allows you the precision you could wish for. However, printed details are more numerous and require several pages, depending on your choices before printing.

Software setting

23. Contents of the BasePDsy folder

With Windows, the folder containing BaseDPsy is installed in the "Documents" directory, in order to prevent it from being transformed into an "unmodifiable" file by the operating system. With MacOS, the folder is installed in the "Application" directory.

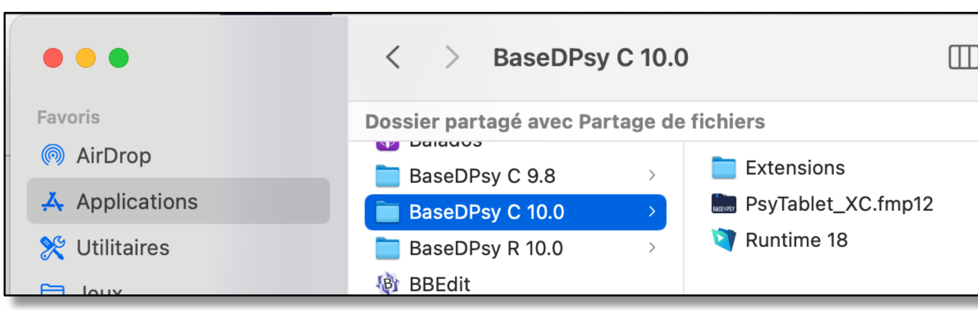
The folder contains: Runtime 18, PsyTablet and extensions; in a computer with MacOS the extensions are grouped in a folder, while on Windows the extensions are in the same folder as the application and end with ".dll".

The names of the different elements change according to the format: a letter is added: "R" for the format without agenda; "C" for the format with agenda.

The folder contains an "application" named "Runtime 18"; this application is provided by FileMaker, an application with reduced functions of the native FileMaker Pro application. FileMaker no longer updates the Runtime since version 18, i.e. since 2020.
You can therefore replace the Runtime by the parent application: Claris Filemaker 19

The folder also contains a file designed to hold your data and containing the specific programming of the functions used to manage your files and finances. It is called "PsyTablet".

The name of the file always starts with "PsyTablet" but ends differently depending on the version and format used.

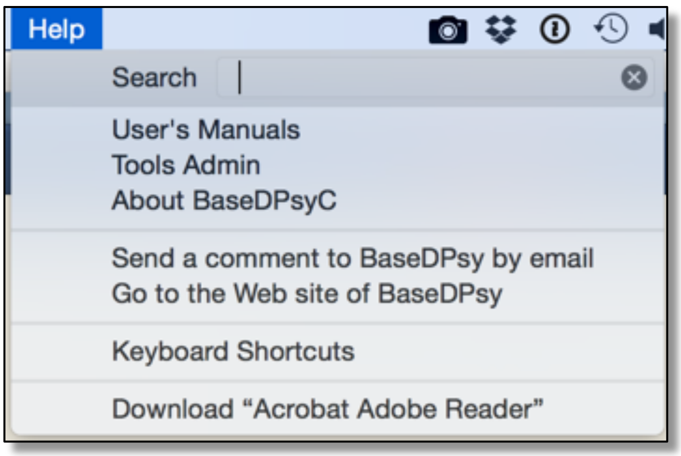


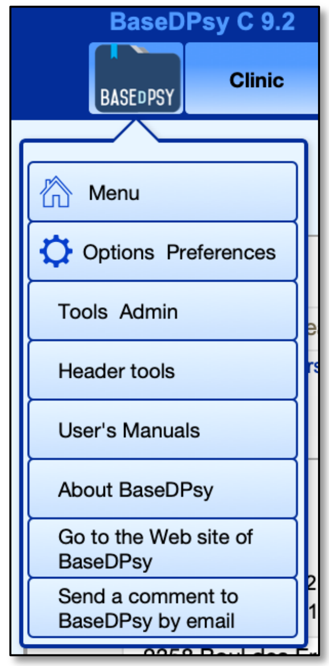
24. Tools to manage BaseDPsy

BaseDPsy offers a set of tools to manage or repair the software.

Some are in the drop down menu or in the header "Help" menu, such as links that allow you to go on the website or write to BaseDPsy.

Be assured also that we respond to all emails within a period of very fast time.

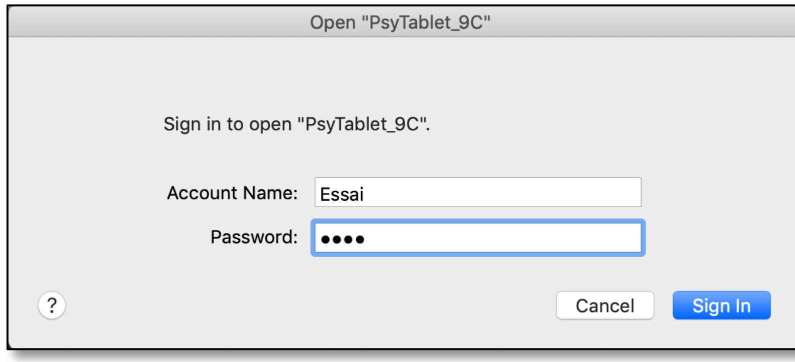




The user manual is on the website in PDF format. By clicking on the tool in BaseDPsy, it will open the web page containing the user manual. The user manual on the website is kept up to date. So all the improvements that require a description are there. As it is a PDF document you can also save it on your desktop from the website using the browser submenu: "Save as ..."

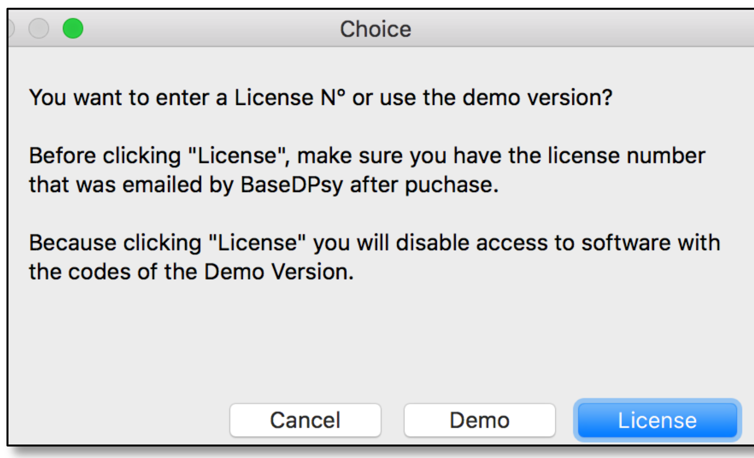
24.1 The Confidentiality of Your Data

When you open BaseDPsy for the first time, you are prompted to enter an account name and password.



But these access codes are the ones that anyone gets by default since they correspond to the access codes for a free trial for 15 days.

The opening is done with a dialog box that offers you the choice between the demo version or the licensed version.



When you purchase BaseDPsy, you then choose "License", but only after receiving the license number by separate email from the purchase.

The first consequence of this choice is to disable the Demo version. After clicking on "License", it is no longer possible to open BaseDPsy with the access codes of the demo version.

And the procedure is followed by the need for you to create custom access codes followed by a closing and reopening of BaseDPsy with these custom codes.

So you only know those access codes.

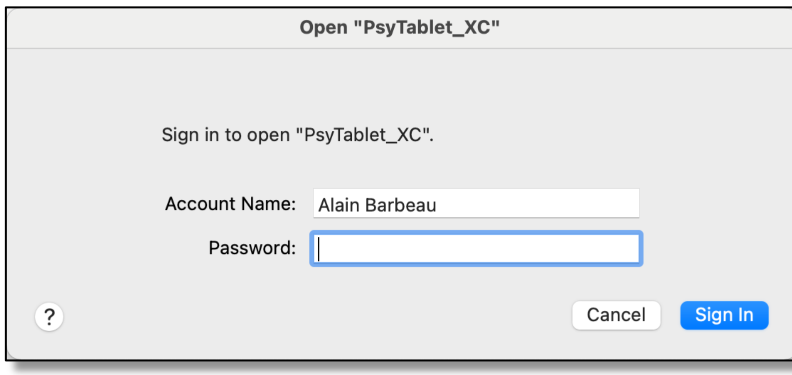
All you have to do is protect your computer and its access to completely secure the confidentiality of your data.

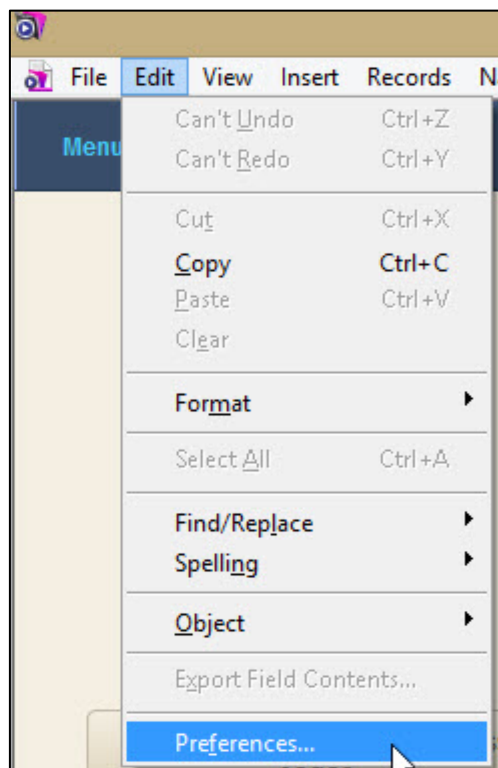
24.2 Customizing BaseDPsy

24.2.1 Customized access codes

Setting the account name when opening BaseDPsy

The first customization that you have to do is to set access codes: an account name and a password only known to you.



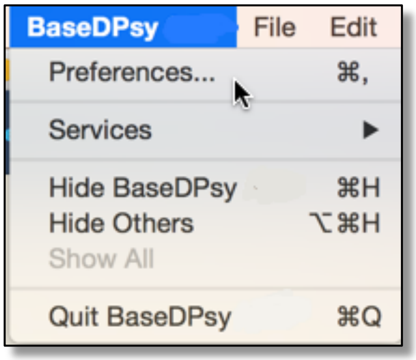


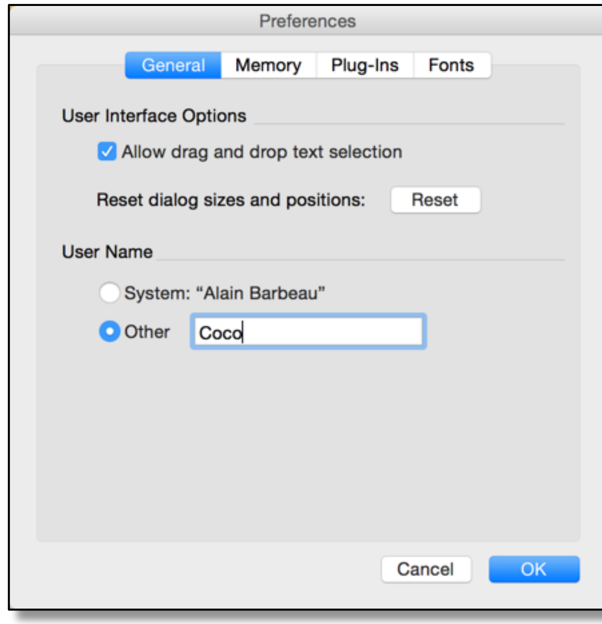
At the opening, BaseDPsy enter already in the "Account Name" the "User Name" that you set in your computer operating system.

If the account name you have chosen is different from the user name set in the settings of your computer, this might annoy you in the long run, to always have to rewrite the account name.

For example suppose you have written "Coco" as the account name when creating access codes. To avoid always having to replace "Alain Barbeau" (your username) by "Coco" each time you open BaseDPsy, you must display the dialog box "Preferences" from BaseDPsy.

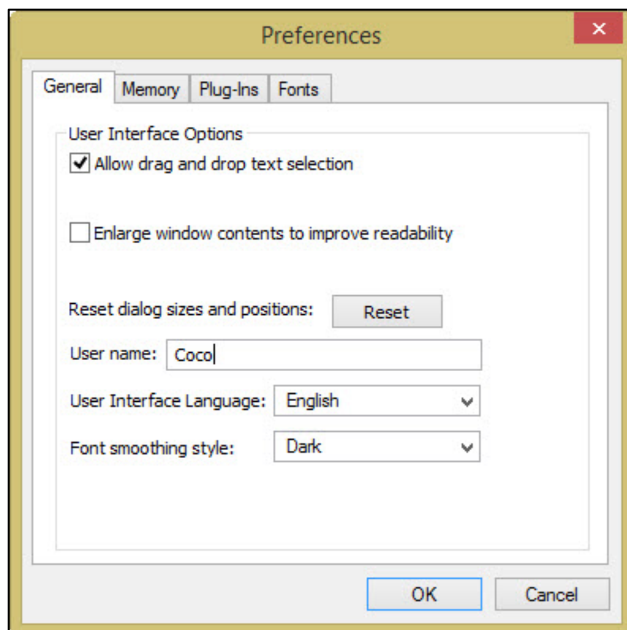
This dialog box is under the header "Edit" menu in Windows, and under the menu heading "BaseDPsy" with MacOS.





In the dialog box, on MacOS, you select « Other » instead of the « System » (Name) and you write in « Other » the account name that you have defined as personalized access code. For example, Coco.

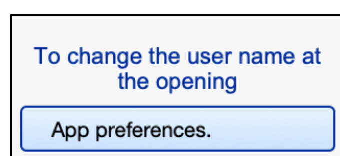
On Windows, you enter the customized account name in the field named « User name ».



So now, every time you open BaseDPsy, the account name will contain the name you chose when setting access codes.

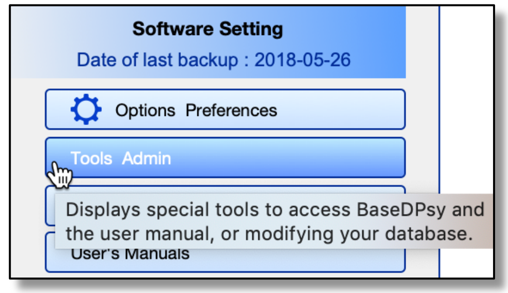
However, since the header menus are hidden by default on Windows, we added a tool to display them in the "Options" section under the "General" tab.

As it may happen that you forget where to find the dialog box to change the account name to the opening, we added a tool in the "Options" section under the "General" tab.



Change custom access codes

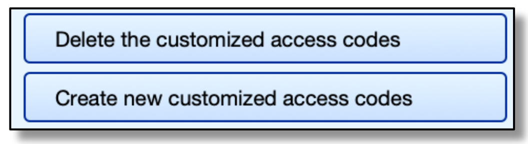
After having set custom access codes when listing your License number, you want to change them.



See the "Admin Tools"

And use the following tool:

1. Delete the customized access codes



After deleting your personal codes, you are prompted to immediately create personalized access codes.

Change the password only

Some users BaseDPsy realize after several days of work with BaseDPsy, that they created too complicated an access code or too simple, or for any other reason they want to change it.

Then, you have only to display the Tools Admin section and to use the button for this purpose.

Forgotten access codes

If you have forgotten your access codes, or if for some reason your access codes do not work, there is only one possible solution: that I connect to your computer remotely, and I open your BaseDPsy with my own codes, and allows you to restore your own.

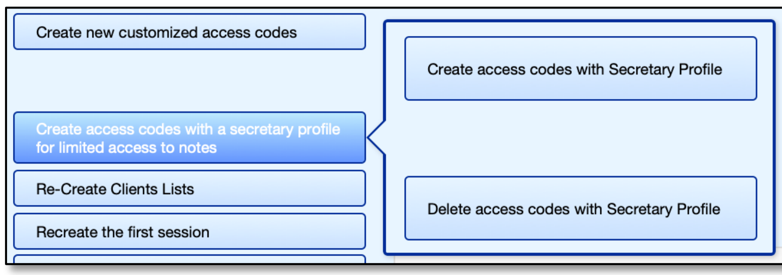
Costs may apply to my support remotely.

24.2.2 Customized access codes for secretary

Creation of access privileges with a secretary profile that maintains the confidentiality of the data, prohibiting the possibility of reading the follow-up notes;

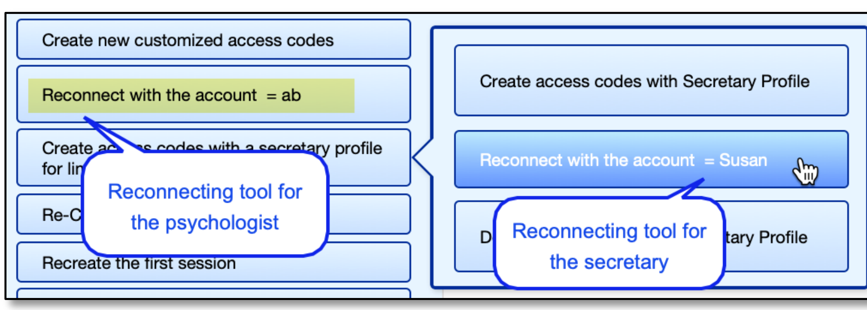
Go to the "Admin Tools" section; The tools are located under the tools to create custom codes for the holder of a BaseDPsy license.

When a secretary account is created, the person holding this position can open BaseDPsy with its own codes instead of using the codes of her boss, and she can create new sessions and invoices or receipts, but she cannot see the content of clinical writing.



Once created, a new tool is available, in order to re-open with the account of the secretary whose name is associated with the new codes. This avoids having to close BaseDPsy to reconnect.

We have also added another tool, which allows the licensed professional to reconnect with his own account and thus have access to his notes and clinical content.



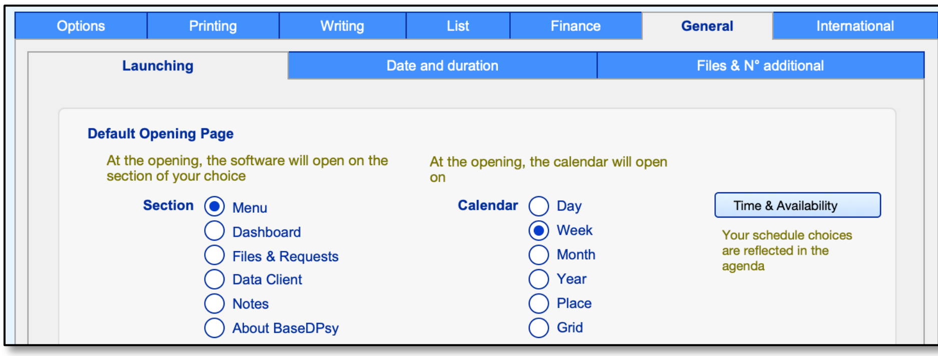
Access codes created with a "secretary" profile allow you to create or delete folders, follow-up notes, reports and messages;

But the secretary account holder cannot read or print the following content: The application, service agreement, anamnesis, follow-up notes, personal notes and theoretical reflections, reports.

24.2.3 Default opening page

Added an option to choose the section displayed when the software on launching;

Go to the "Options" section, "General" and "launching" tab.

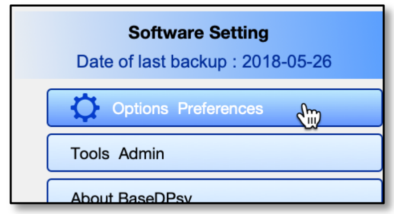


If you use the Calendar version, you can also set the work schedule displayed in the calendar.

24.2.4 Information about your profession and practice locations

Although BaseDPsy layout cannot be as flexible as you use a word processor, it is possible to choose the information you'll enter your letterheads, reports, account status and receipts.

Display the "Options Preferences" section and display the contents of the tab "Printing".



In this same tab, there is several sub tabs that will allow you to choose what content you want to print.

The only choice that BaseDPsy cannot offer you is the location and shape of the characters. But you can choose from a font of 9pt or 11pt for the text of writing notes and reports when printing.

Ordre des psychologues du Québec

Choice of profession displayed on invoices and Notes

Since the profession's recognition of "Psychotherapists" by Bill 21, many professionals, whose first diploma is not in psychology, exercises that work.

But even more, some professionals have several professional titles and offer varied services. So it was increasingly common for professionals asking me to choose the profession that would be displayed on receipts, bills or even the reports.

This is somewhat understandable that a social worker, for example, wants to identify differently professional title when invoice massage therapy. Similarly, for psychoeducator sometimes offering of services sexologist, sometimes psychotherapists services, and sometimes the education consultant services.

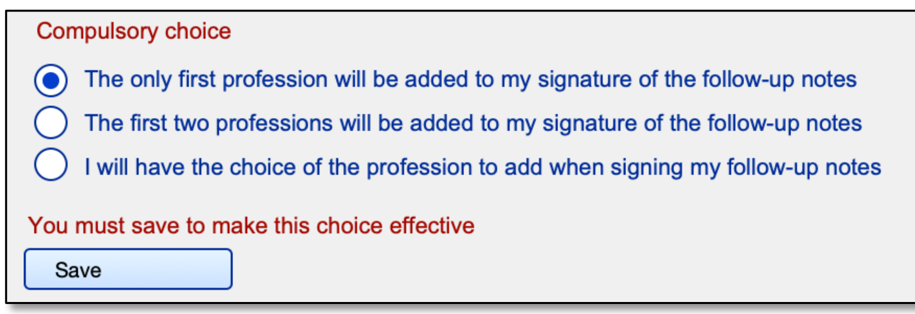
So, we added a first option to choose if you need this procedure to choose which profession you want to appear on the bill.

These choices are available in the "Options" section under the tab « Printing / Contents / Profession »

Three fields allow you to enter three different professions as well as the associations or professional orders concerned.

If you are registering a single profession, we recommend that you use the first line to enter it, in order to ensure the proper functioning of the underlying procedures.

Then you must choose one of three options that will determine the information that will be added to your follow-up notes when signing.

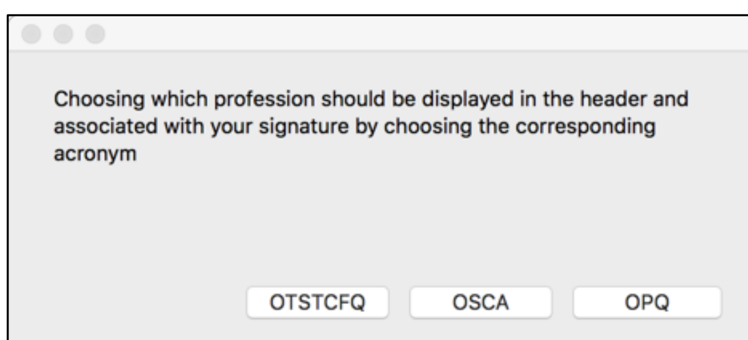


At each data modification of your professional identity, you must click "Save".

The acronym (s) are "Mandatory" because not only will they be used to identify your Practice Permit #, but they will also serve as a button for choosing the profession to display on your notes and invoices, if you have chosen the third option "I will have the choice of the profession ..."

This is the dialog box that appears when you print a follow-up note, if you chose the third option.

The name of the buttons corresponds to the names you have entered under the heading "Acronym".

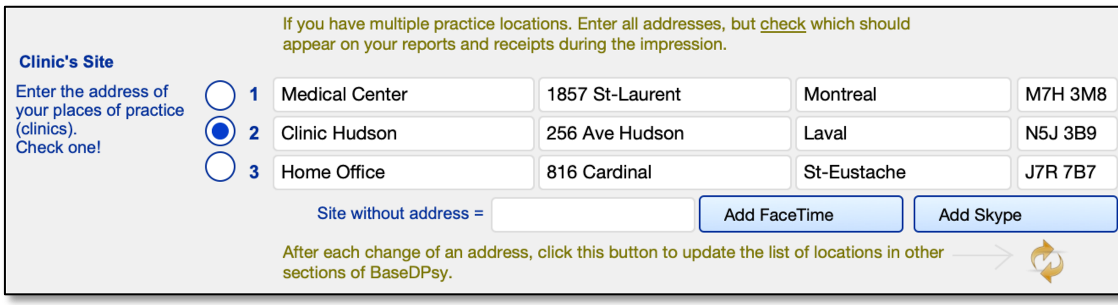


The procedure is activated for printing notes and for the signing the summaries of the session, so you will also have the choice to sign your intervention's abstracts differently.

However, note that the header is changed only if you print, and after ordering the printing, in order to minimize the slowdown of navigation in BaseDPsy. For thus, the procedure is not started as long as you do not start to print.

Place of Pratice (Workplace)

Under the next tab "Address", you are invited to enter your various professional workplaces. Again, three places with civic (physical) addresses are available as well as three virtual locations (Skype, FaceTime, other).



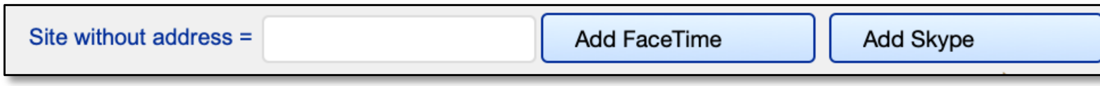
It is important to click on the list update tool whenever you change the content.

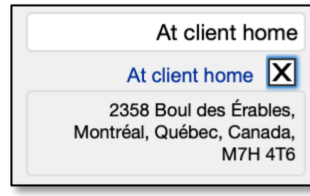
The information entered in these sections will be reused in several sections: in the "Files & Request" section under the "Agreement" tab, whenever you indicate the place of practice where you meet your client, the address will be automatically associated with the place of practice. The drop-down list of places of practice will also contain these three places, if you have more than one.

In the Notes section, this information is inserted automatically when the session is created, if the information was entered in the agreement at the time the file was created.

If they are not, you can enter them manually in the empty fields.
By clicking on the "Location of the meeting", you will see that it contains the list of places of practice that you have created in the "Options" section.
If you choose one of the practice locations from the list, the address will automatically be inserted in the adjacent field.

We also added a fourth field and buttons to add places or methods to the list.





<u>If it is at the client's home.</u>
Check the "At client home" box with an "X".
By checking the list of places of practice is automatically modified by adding : "At client home" and the address of the client is automatically inserted in the place of appointment

<u>Note: If you import your data from version 7 or less</u>
After importing a previous version, however, all the notes will have lost their place of appointment because the places of practice are no longer defined in the same way, and the places of appointment are now directly linked to the spelling of places of practice.

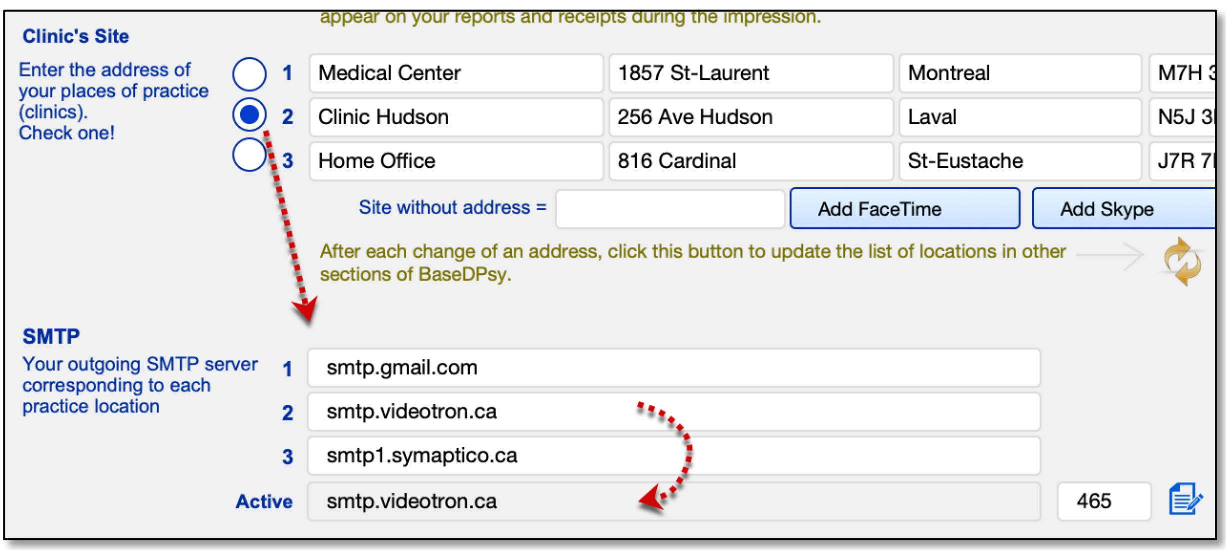
<u>However</u>, if the places of practice defined after the import have the same names as those recorded in Notes, the places of appointment will also be present.

Sending email by smtp

Unless you use a browser (eg Safari, Firefox) to receive and send e-mail, the Internet connection may vary depending on where you are physically located. So the connection to the email service goes through an "outgoing server" that can vary from one place to another. The outgoing server is an "SMTP" address.

It is advantageous to use the SMTP address: BaseDPsy directly sends the email instead of going through your email software, it is faster and the procedure is also programmed in general to send you a true copy.

As there is a possibility of 3 SMTP addresses, the one that is "active" will be used, and the one that will be active is determined by your choice of one of the three addresses of the places of practice. By ticking the practice area N ° 1, the SMTP address in the N ° 1 heading will become active.



If you do not enter any smtp addresses, the active smtp remains empty. And when the active field of SMTP is empty, when you click on a tool to send an email, the procedure will automatically go through your email software.

Conversely, as soon as an SMTP server address is active, BaseDPsy will first use smtp.

In the illustration above, you can see that numbers next to smtp server addresses indicate where each local address matches each smtp address.

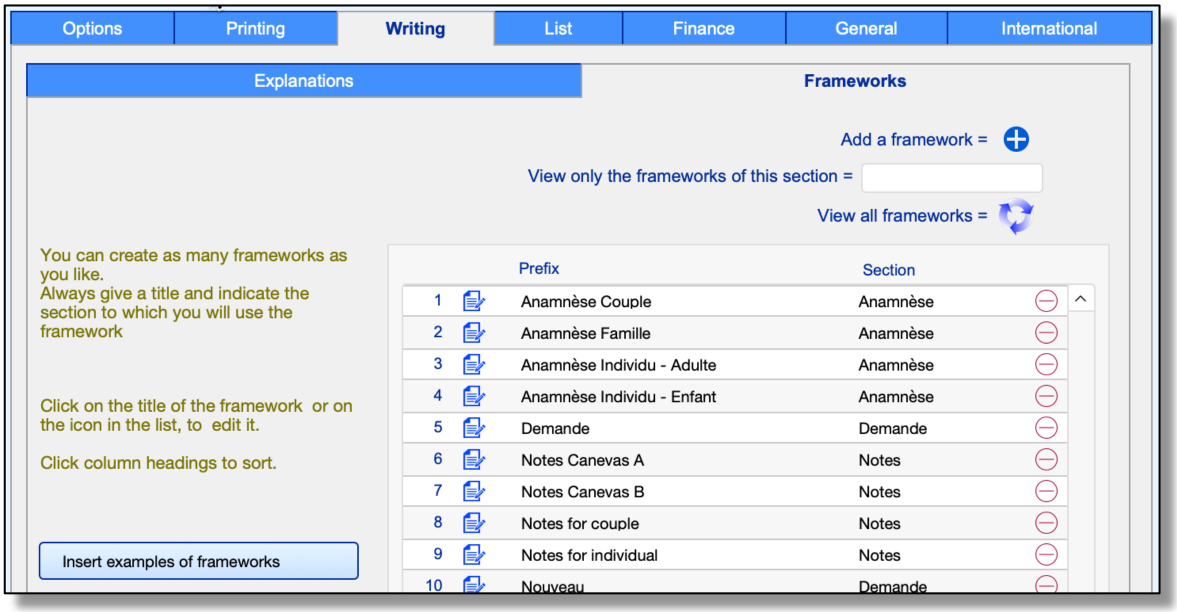
The active smtp is changed each time you change the check mark next to the place of practice.

See Chapter 7 on sending messages for SMTP server settings.

24.2.5 Frameworks : Adapting structures writing to your personal style

It is possible to insert in BaseDPsy the text structures you usually use to write your notes, evaluation reports, and your histories.

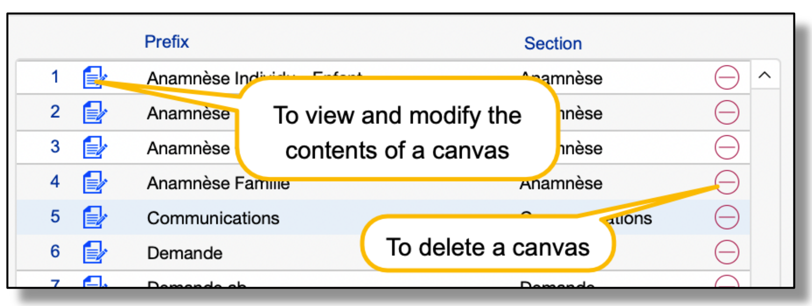
In the « Options Preferences » section under the "Writing" tab, you'll find tools that allow you to define many writing frameworks.



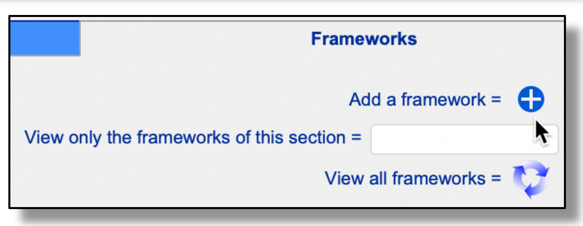
Frameworks insertion is available in all sections where you write. Since the frameworks are usually specialized according to the service rendered, each canvas is therefore associated with a particular section. So when you create a frameworks, you must also indicate to which section it is intended.

The "Insert examples of frameworks" tool allows you to add a dozen predefined templates that you can modify and customize.

Any framework can be edited or deleted

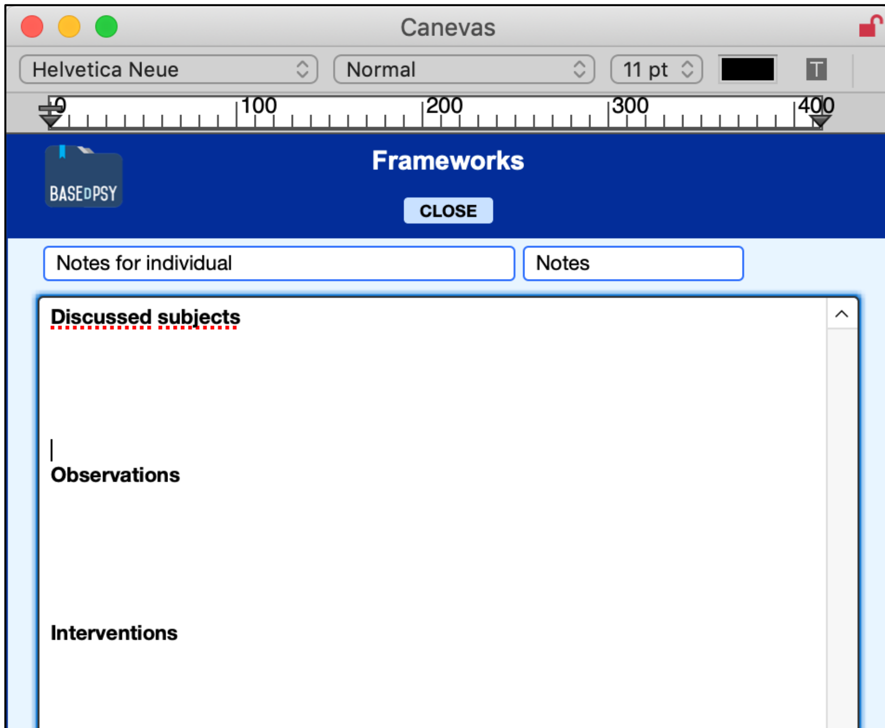


To add a new framework, click on the “+” tool.

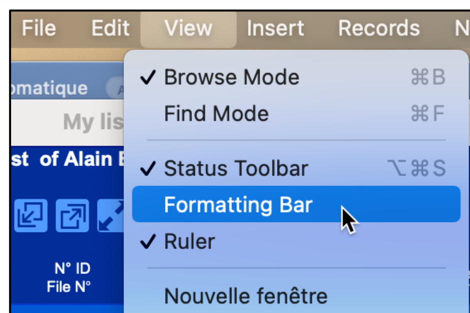


To define a framework, a floating window is displayed with the tools to modify the text. You can expand the floating window to view all text editing tools.

All content will be editable in form, color, font, size, tabs, and so on.

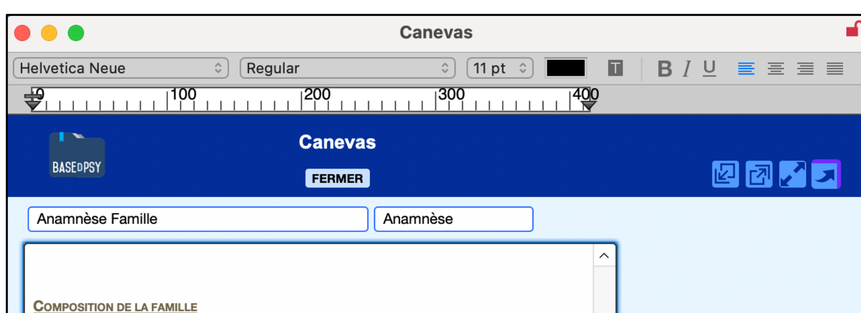


To display the text editing tools, you must scroll down the "View" header menu and choose "Formatting Bar".



Then you need to expand the floating window to show all the text editing tools.

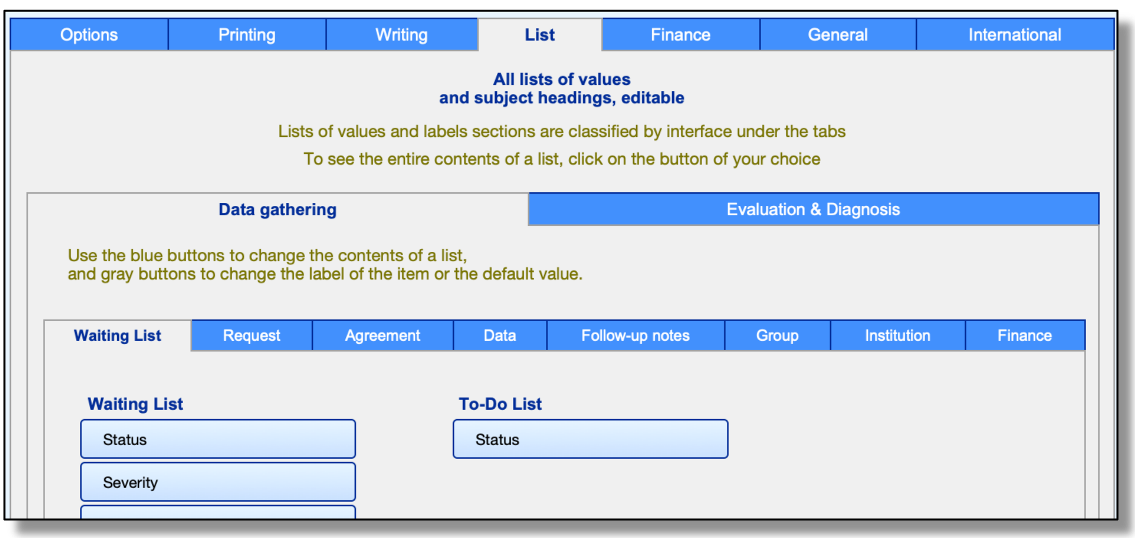
All the content will be editable in terms of shape, style, color, font, size, etc.



24.2.6 Customize the content of the dropdown lists

BaseDPsy has several fields containing a list of values that drops down by clicking in the field. These predefined value lists are designed to speed up your data entry. 57 of these value lists are editable.

To change the content of a list, you display the "List" tab in the " Options Preferences " section, or you click the icon next the field in the other interfaces



All the lists of values from the drop-down menus are grouped under the "List" tab in the "Options" section and organized into sections.

Default values

Choosing a default value allows you to speed up your data entry and thus generally speed up your use of BaseDPsy.

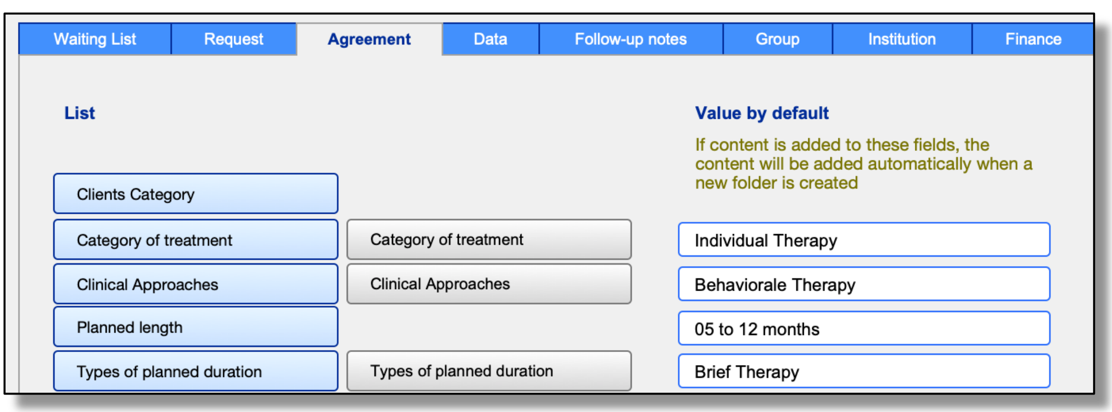
Because when a default value is saved, it is automatically inserted into the data entry. For example, if you have entered a default fee, the default fee will be inserted automatically when a new folder is created in the Agreement section, and it will be inserted automatically when creating a new follow-up note under Invoicing tab, which will save you several write actions.

Several default values can be saved.

We suggest you look under all the tabs in the "Preferences" section. The list of default values is as follows:

- The size of the characters in the print;
- The "For" display, ie the identification of the beneficiary of the service when a third-party payer is used;
- The presence of the File N° and the Client N° on the invoices and receipts;
- The display of transactions in the ledger (3, 6, 12 months);
- The default fee;
- The offer to export reports in Excel format;
- The calculation of taxes;
- The default opening page for BaseDPsy and Calendar;
- The frequency of the update of BaseDPsy;
- The default titles of the tools containing the word "psychotherapy";
- The addition or not of 7 days in the date of the next meeting;
- The duration in minutes of the session;
- The modification of two headings: Previous File N° and Client N°;
- The number of years for the calculation of the date of destruction of the file;
- The format of the phone number;
- Address format (US or European);
- The currency symbol;
- The display language in the BaseDPsy interfaces;

Here is an example.


Waiting List
Request
Agreement
Data
Follow-up notes
Group
Institution
Finance
List
Value by default
If content is added to these fields, the content will be added automatically when a new folder is created
Clients Category
Category of treatment
Category of treatment
Individual Therapy
Clinical Approaches
Clinical Approaches
Behaviorale Therapy
Planned length
05 to 12 months
Types of planned duration
Types of planned duration
Brief Therapy

24.3 Correct the mistakes of use

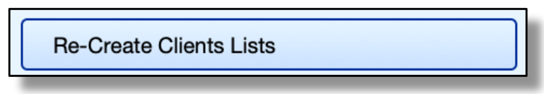
In the « Tools Admin » section, three buttons allow you to correct the most common errors in using BaseDPsy.

The button « Continue » is always displayed

During certain procedures, the "Continue" button appears after a pause in the process and is masked by clicking on it or at the end of the procedure.

If you stopped a procedure or missed a step in the progress of a procedure, sometimes the "Continue" signal remains visible. This persistence of the signal can be annoying and even cause confusion in the use of BaseDPsy.

To mask the « Continue » signal, you have just to click the button for this purpose.

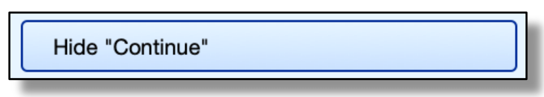


The name of a customer is not present in the drop down list of clients.

Sometimes, after an import, or after handling files or erase notes, a client name disappears from the dropdown list of customers, even if his record is still existing.

Although what causes such a disappearance is not always clear, there is a way to fix this list.

Go to the " Tools Admin" section and use the button for this purpose.



Unable to add a session to a client

Sometimes, when reaching the "Notes" section from another section, the customer does not appear as expected. Or when attempting to view the client in the "Notes" section from the list of clients, he is not present in the list. When this happens, is that the link between the client file and the notes was lost.

To restore, go to the « Tools Admin » section and use the button labeled "Recreate the first session".

24.4 Saving a backup copy.

24.4.1 Basic Concepts of Backup

The backup method in version 8 is different from the previous versions method. It is more automatic.

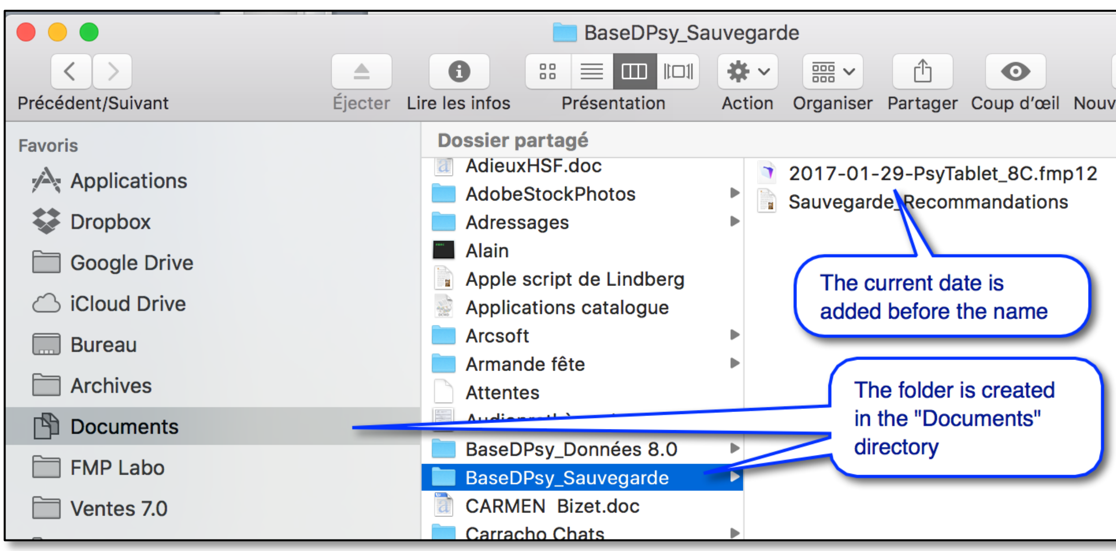
Before seeing the method, it is important to understand the following basic concepts:

In the folder BaseDPsy installed in your Documents directory, there are two files to distinguish: the one named "BaseDPsy" is the application (runtime of Filemaker pro); The file named "PsyTablet_8R" or "PsyTablet_8C" is the one that contains your data.

There is also another folder that contains the extensions. And on the Windows platform, there are a large number of system files ending with ".dll".

We strongly recommend that you never modify any of these files because that will make BaseDPsy out of order with the risk of not having access to your data.

Now when you install BaseDPsy on your computer, the installation creates a folder (directory) in the section (directory) named « Documents » of your computer.



So when BaseDPsy makes a backup, it makes a copy of your data file and places it in the "BaseDPsy_Sauvegarde" folder that was created in your "Documents" directory. In addition to making a copy, it modifies the name by adding the date of the day of the backup.

If you make multiple automatic backups in the same day, as the title will be the same, previous files with the same name will be overwritten by the newer ones.

You should also know that a lot of backup takes up a lot of space because each data file weighs a little over a gigabyte.

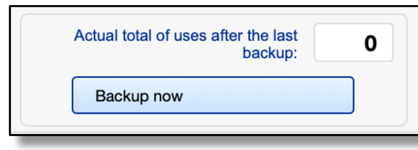
Hence we suggest you keep no more than 5 to 6 copies of the data file.

Manual backup is not available on iPad, rather it is provided by iTunes and its synchronization procedure.

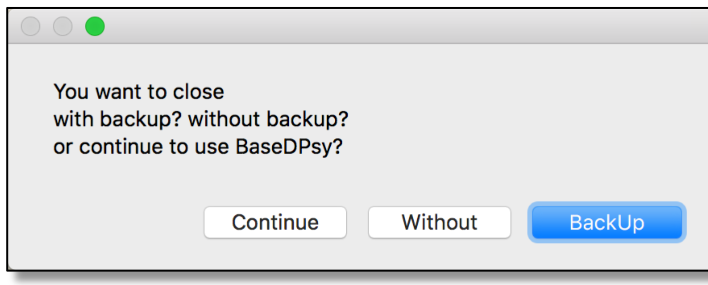
24.4.2 The backup procedure

The procedure is automatically started whenever you close BaseDPsy.

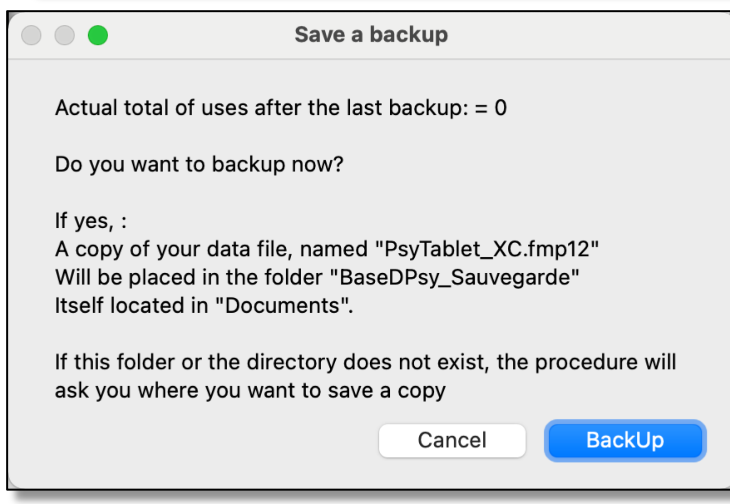
You can also launch it manually by displaying the "Admin Tools" section.



When you close BaseDPsy the backup procedure is started, several dialog boxes tell you the steps. The first prompts you to confirm that you want to make a backup.

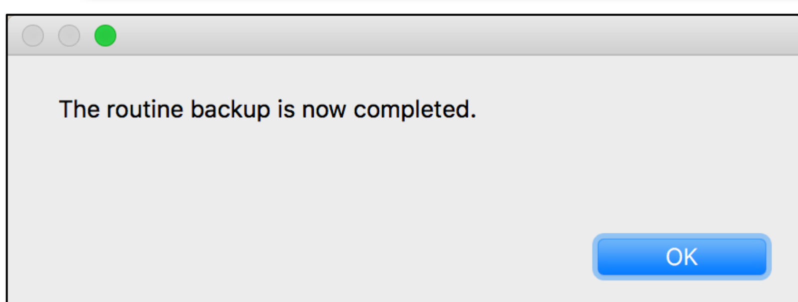


If you click "Backup" the procedure will create a second window instead of closing the software. If you click "Without", the procedure will close the software without making a backup.



If you click "Backup", a second window appears asking you to confirm, but also to explain where the copy will be placed. You must then click "Backup" again to continue the procedure.

A final window warns you that the procedure is complete, just before closing the software.



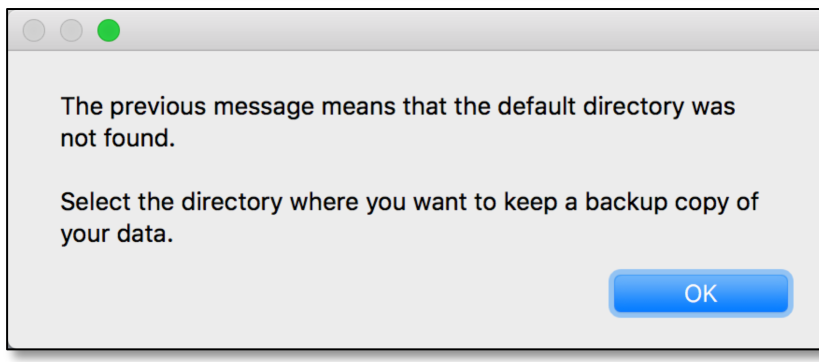
The backup copy was placed in the folder “BaseDPsy_Sauvegarde" in the "Documents" directory.

24.4.3 Error message during backup

The backup procedure has been designed to considering that during installation, a folder (directory) named "BaseDPsy_Sauvegarde" is created in the "Documents" folder of your computer.

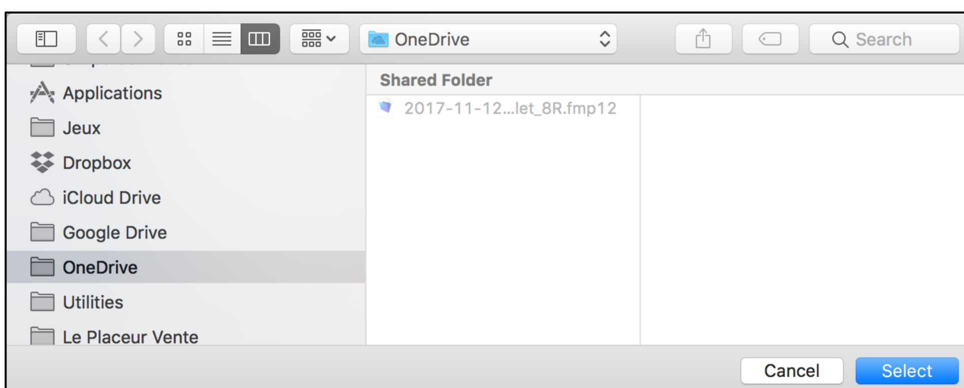
If for some reason you have not created this default backup folder, or if you have installed BaseDPsy somewhere other than the recommended directory, it is possible that during the backup you would receive an error message similar to this :

In this case, this message will be immediately followed by another explanatory message:



Which message is followed by opening a window on your computer, asking you to identify the folder (directory) in which you want to save a backup copy.

The window that opens allows you to guide the procedure to the folder or directory of your choice: it can be an external hard drive, a cloud service such as iCloud or OneDrive, or another folder on your computer.



In the following example, we chose "OneDrive".

If you click "Cancel" instead of "Select", BaseDPsy will close without backup.

24.4.4 Double the security of your data.

The "PsyTablet_9…" main data file found in the "BaseDPsy C 9 folder ..." may be damaged during use, either because of a problem in the computer, unexpected shutdown, electrical trouble, or any other Electronic hazard.

The security copy is made in the directory "Documents / BaseDPsy_Sauvegarde" of your computer. This copy protects you from breaking the main file in the main folder.

But it does not protect you from a break from your hard drive, or from the computer.
To protect yourself from these breakages, make a copy of the directory "BaseDPsy_Sauvegarde" in an external hard disk, a cloud service or in a USB key.

Make a regular copy of the directory at least once a week.

In this other copy, you can also keep only those of the last week.

Note that this procedure is not available when BaseDPsy is used as a Multi-user, as it is performed daily by the server itself.

24.4.5 Recovering data from a backup

This is rare, but your data file may be damaged by a system error, power outage, or computer crash. It may even happen that a breakdown of the hard drive or operating system make you access impossible to your data.

In this case you will be very relieved to know that you have a backup of your data file in an external hard disk or on a USB key.

And here are the steps to recover the backup.

1. Prerequisite: If your computer does not display the extensions, at least temporarily modify the display settings to display the extensions, otherwise you will not see if the file "PsyTablet ..." ends with ".fmp12 ". It is important that the extension is written correctly so that the BaseDPsy (Filemaker runtime) application finds the data file;

2. Download BaseDPsy and install it in your new computer. No need to register the license;

3. Once installed, locate the "PsyTablet ..." file in the new installation folder, and delete it;

4. Insert the USB key or the external hard drive, and then open the folder (directory) containing the backup files;

5. Identify the most recent backup file, and copy it to your computer's desktop;

6. Change the name of the backup file to « PsyTablet_XR.fmp12 » or « PsyTablet_XC.fmp12 »;

7. Take the renamed file on your desktop, and drag it into the BaseDPsy R 9 or BaseDPsy C 9 folder that you just installed in « Documents » directory;

8. Open BaseDPsy, it's over

24.5 Update and importing data

24.5.1 Preliminary explanations

Whenever an update is available, you will receive an email notifying you, and if you have checked the option, BaseDPsy will notify you when you open the software if you are connected to the Internet.

BaseDPsy publishes updates whenever it corrects one or more disfunctions reported by users or adds new features.

Updates are free. Not to be confused with the upgrades that are a new version of the software. The upgrade is distinguished by the fact that the number designating the version increases by one. Like switching from version 7 to version 8. When it is a decimal change, it is an update, as from 7.7 to 7.8.

BaseDPsy updates is a bit more complex than an update of software that does not include a database, because in this type of software the file containing the data also contains much of the programming.

In order to update or upgrade, the data included in the previous version must be imported into the new version.

24.5.2 Importing Data Procedure

The first step is to prepare your old version for import. As this is to transfer the data from this version to another version the preparation procedure is called "Export"

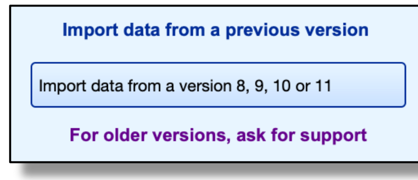
Open the old version, view the " Tools Admin" section, and then click the pale green color tool under the term "Export." This will launch an automatic procedure that ends with the closing of this version of BaseDPsy.

The second step implies that you have already installed the new version and that you have registered your license number, otherwise do it.

Important note: in the new version: enter the same custom codes as in the old version: therefore, the same account name written in the same way and the same password. This will prevent the procedure asking you about twenty times what your access codes are from the old version.

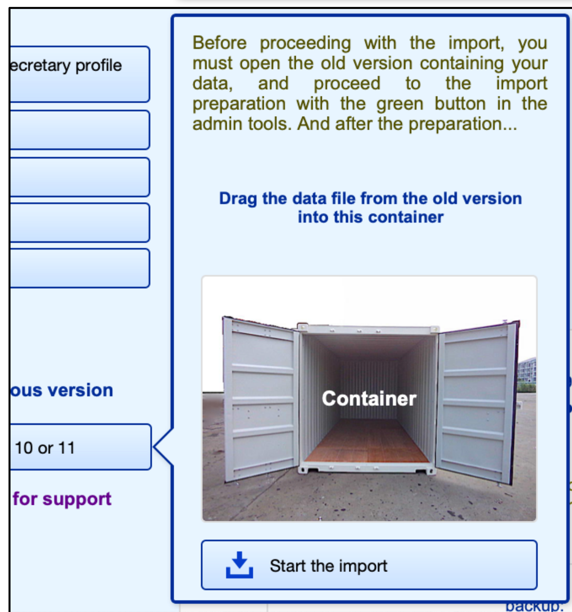
Once the new version of BaseDPsy is open, go to the Admin Tools section.

If you have a version 7 or less and you want to import the data into version 11, you must contact us, as the procedure is more complex and has limitations; it must be done by us.



If you have a version with a number higher than "7", click on the tool "Import data from a version 8, 9, 10 or 11".

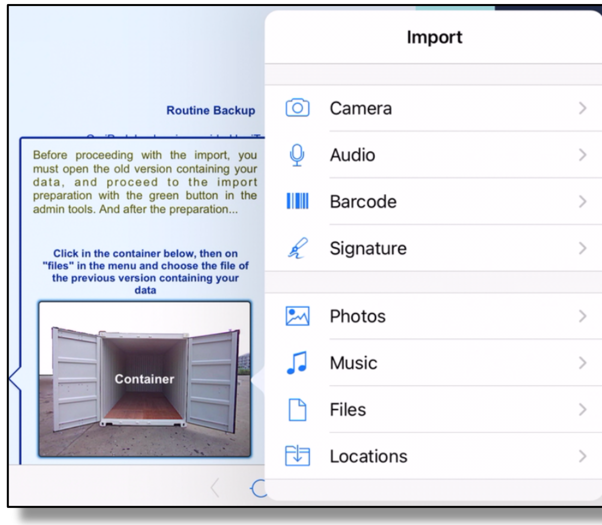
This will open a small window with a "Container".



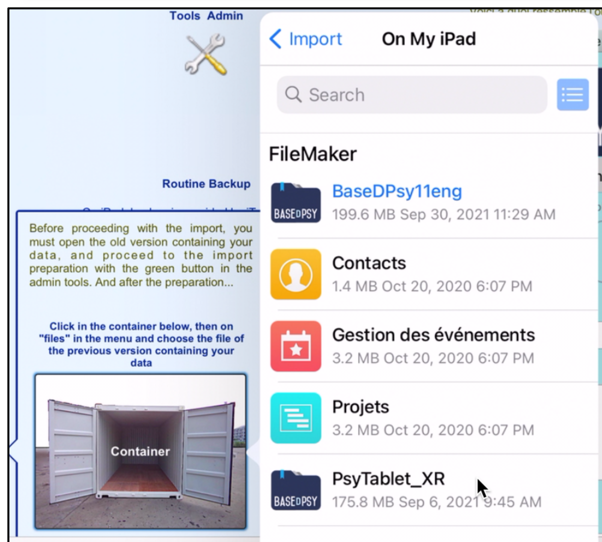
Drag the file from the old version into the container. For example, here we have dragged the data file of version 9 which is called "PsyTablet_9C".

Special features on iPad

To insert a file on iPad in the container, you have to tap inside the container with your finger. This will bring up the import tool.



In the available choices, you tap "Files". This displays the list of files available in FileMaker GO.

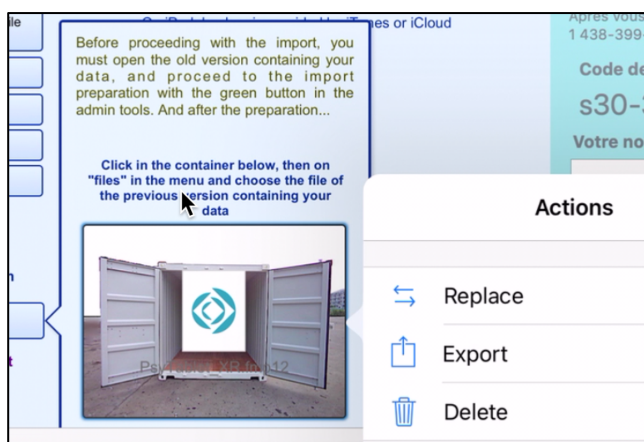


You choose the file corresponding to the one containing the data from your old version. In the example opposite, we will choose "PsyTablet_XR".

This will insert the file into the container.

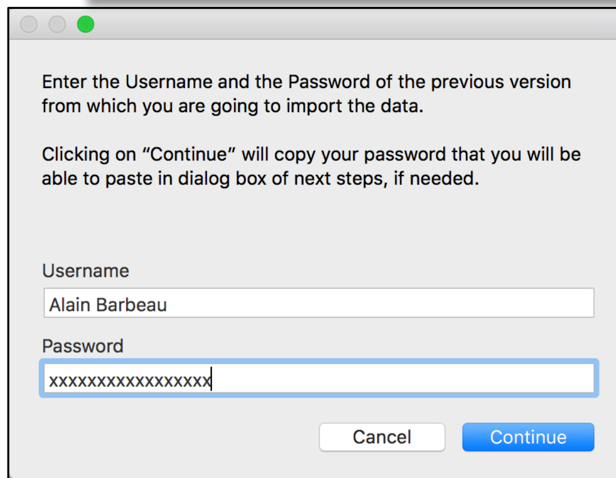
Since other tools appear after the file is inserted into the container, tap next to the list of actions to cancel their use and so close the list and the container.

Reopen the container by tapping on the tool: "Import data from a version 8, 9, 10 or 11" and go to the next step.



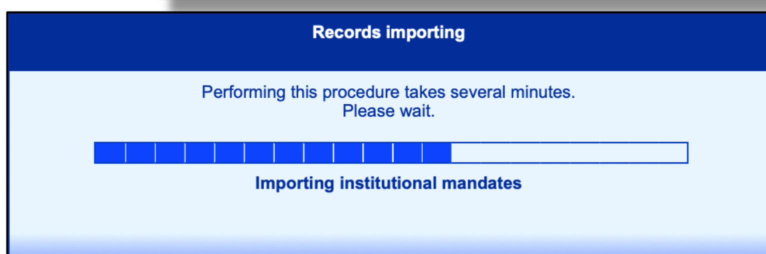
Then click on the "Start the Import" tool

A first dialog box opens to ask you for the access codes of the previous version.

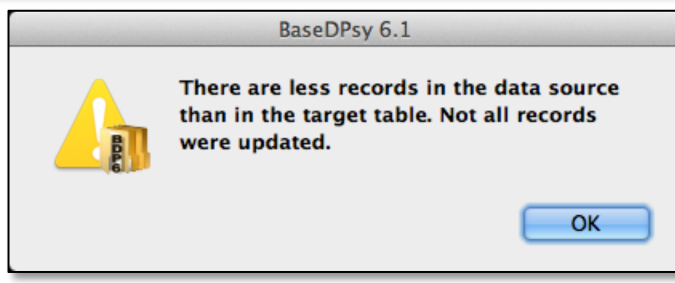


If you have made a mistake, or if the access codes for the previous version and the new version are different, this window will appear a very large number of times and will test your patience.

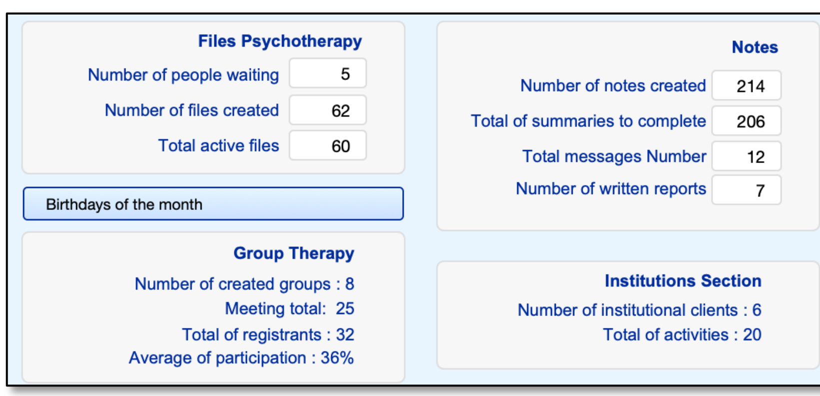
Once launched, the update process displays a window showing the progress of the import.



It is possible you receive a message telling:
« The data source contains fewer records than the target table. Not all records have been updated. »
Do not worry about it, just click « OK » or « Continue ».



If you are concerned about importing everything after importing, there is a quick checking method: compare the two dashboards (old and new); Do you have the same number of files, notes, transactions, and so on?



25. Distinctive features of BaseDPsy when use in Multi-users format

25.1 Confidentiality categories

Some functions have different procedures depending on the privacy category chosen by the organization that uses BaseDPsy. This is the case in particular with the procedure for modifying the holder of a file.

BaseDPsy Multi is programmed to be used in two specific categories of privacy.

In general, no one can connect to BaseDPsy and access the information contained in BaseDPsy without having a customized account name and password.
However, when logged in, access to folders may vary depending on the type of privacy you choose.

Each record is associated with the team member who creates the record, and this link is identified by the record holder's name; The holder name may be amended after the fact. Each follow-up note written in a file is signed automatically by the person who writes the note.

Team Confidentiality

In this privacy category, all team members with a BaseDPsy access account have the ability to read all information about all the client file included in BaseDPsy. Even if a file is created by one of the team members, all other members of the team can read the data and notes entered on each client, even if they are not the file holder.

Individual Confidentiality

In this category, confidentiality is tied to each member of the team individually. When a team member logs on to BaseDPsy, he can read only the data included in the files he has created itself; He alone can write notes or add data to "his" records. Other members of the team can not read the contents of their files.

On the other hand, every professional with access to BaseDPsy and having files belonging to him (her) can give access to a colleague to a file or files of his choice. It is also possible to transfer a file to another professional on the team. He may also withdraw this sharing of information from a colleague later.

25.1.1 Access in an organizational context

The use of BaseDPsy Multi is usually done by an organization that wants to offer its professionals access to a central network of clinical record keeping.

In the user team, there may be professionals bound to professional secrecy according to criteria set by a professional order and others whose practice involves sharing information. This is why, even when an organization chooses an individual type of confidentiality, it is possible to make an exception for certain files and to share access with colleagues, but it is the professional who decides.

On the other hand, in an organization, there are team members who have different roles of clinicians and may need access to the records. That's why we have two other categories of access that coexist with individual privacy.

Professional access

This access allows its holder to create client files, follow-up notes, reports to which only he will have access. Each file, note or report created will be linked to its identifier and will be referred to as the "holder" in BaseDPsy. On the other hand, he will be able to share access with another professional who also has a "Professional" access. It can also delete the file sharing or transfer the file to another professional. During file transfer, he loses access to the file he has created.

Supervisor access

This access allows "View" folders, notes and reports created by another professional after the "supervised" professional has shared the client's file with his supervisor, but the supervisor cannot create or modify the content. It also allows the supervisor to add "supervisor notes" in the follow-up notes of the professional.

Director access

This access allows a person to have access to all the files. On the other hand, even having access to all the files, he cannot read the contents of the follow-up notes or the contents of the reports. He cannot create folders or notes either. On the other hand, this last limit can be canceled, if it is requested by the organization. This could be the case, for example, of a clinical director whose task is to evaluate the quality of the interventions.

This access to all the files is necessary also so that the director can launch the statistical procedures including all the data of the base. Because, if the professional can also use the statistical procedures, the results will be limited to the files of which it is the holder.

Team leader access

Team leader access is similar to that of the manager but is limited to the files of professionals sharing the same service department. So he can read the contents of the folders of all professionals in the same department, but he cannot create folders.

Secretary access

This type of access can be attributed to a person who is not really a secretary but who has a role in the team requiring access to the files. For example an administrative agent who bills customers or receives payments, a secretary who makes appointments ... etc.

This access allows the holder to create folders and grades without access to the contents of notes and reports. She can create folders but then assign them to the relevant professional. She can also manage the waiting list, but it is best if she assigns the wait to a professional before creating the folder from the waiting list. As appointments in the calendar are created at the same time as the scorecards, it also allows him to manage the calendar.

Supervisor access

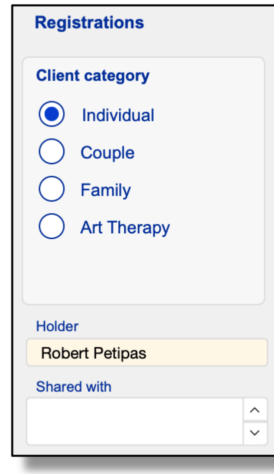
When a professional is supervised by another professional, he may indicate his name in the Options section so that the supervisor's name is added in the tracking notes.

In the Multi format, supervisor access is open to the relevant professional.
However, the supervisee must use the tool to share his patient file with the supervisor so that the supervisor can read the content of the supervisee's follow-up notes.

This access and sharing allows the supervisor to read the supervisee's data and notes about his or her interventions, but does not allow the supervisor to modify the contents of the shared folder.

On the other hand, a special section allows the supervisor to add his comments and another to indicate that he has read the notes.

25.2 Holder of the file

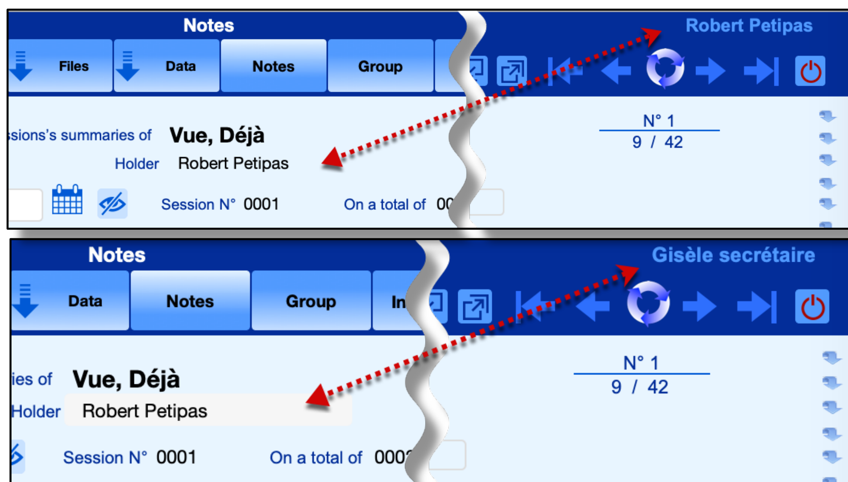


To create a file, you must display the "Files & Request" section in BaseDPsy Multi.

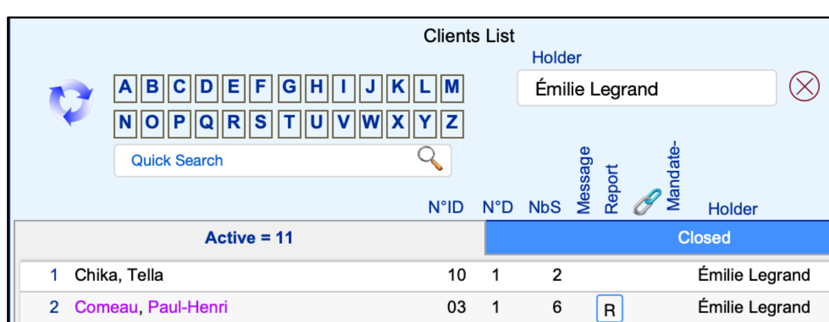
And when a team member creates a file, his name is automatically inserted in the field that defines the holder. Subsequently, in all BaseDPsy Multi sections for a client, the name of the holder is displayed.

The name of the file holder can be modified after the fact according to two different procedures, which are linked to the privacy category chosen by the organization.

The name of the holder is also present under the client's name in the other sections.
If the user with access to the folder and the notes is different from the holder, the holder's name is then surrounded by the pink color.



In the "Notes" section, when the organization has chosen the team confidentiality category, it is also possible to search by holder to display only the notes written by a particular holder. Moreover, when an organization requests that all the files be shared between all the professionals, in the list of the customers in “Files section”, a filter makes it possible to display only those of the one or the other holder. This filter is also present for someone with secretary access, even in the individual privacy format.



25.2.1 Who changed the data?

When sharing records with one or more colleagues, the information in the file may be changed by a colleague. Out of respect for the collegiality and authority of the notes inserted in a file, BaseDPsy makes it possible to know who modified the information in two ways.

For individual follow-up notes, the signature of the professional who writes a note is added automatically; For notes on institutional activities or group meetings, each professional can manually add his or her name.

Regarding the information about the individual in the "Data" section, or the group or institutional mandate in their respective section, we have added, in the footer, information about the dates of creation and modification of the data associated with the name of the professional.

25.2.2 The relevance of the file transfer or the change of file holder

File transfer is relatively common in an organization that offers different services to its clientele, or who use people from different professions.

It also happens that a customer, for different reasons, asks to change intervener.

The goal of file transfer is to avoid creating multiple folders for the same client.

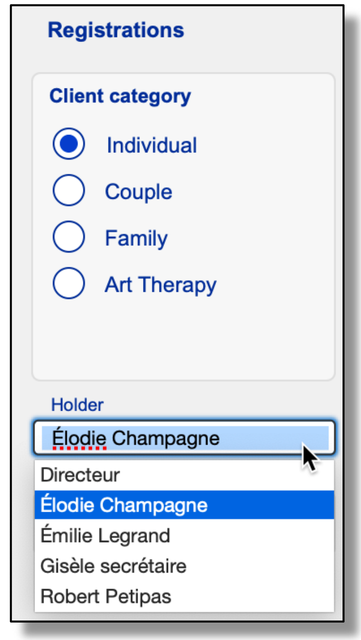
If it is simple to transfer a paper folder contained in a filing cabinet, it is otherwise in a software.

For this reason, in the Quebec health system, the notion of "pivotal worker" was created, which corresponds to the main intervener in charge of planning client interventions within 'a team.

In BaseDPsy Multi, the pivot player is named "Holder".

25.2.3 Change file holder in a team confidentiality context

When you use BaseDPsy Multi in a context where all users have access to all folders and notes saved in BaseDPsy, changing the name of the file holder is relatively straightforward. Simply click on the name of the holder and select the name of the holder from the list of users.



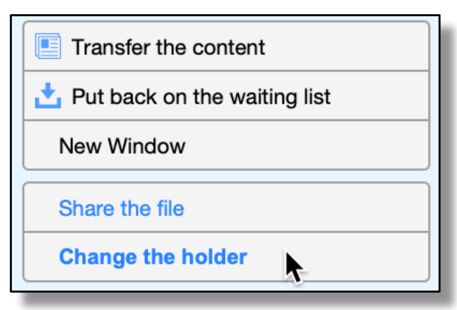
For individual files, the change of holder must be made in the "Files" section under the "Steps" tab; The change is reflected in the notes and messages attached to this file.

For group files, the change of incumbent is done in the "Group Therapy" section, and this automatically leads to the change of holder in the notes concerning the meetings of this group.

For institutional clients, the change of holder is made in the "Mandate" section under the "Content" tab. The change is reflected in the activities related to this mandate.

25.2.4 Change holder in a context of individual confidentiality

Remember that in BaseDPsy Multi, the confidentiality of the data is ensured by the fact that any file is linked to a particular team member. Each employee with a professional type access inside BaseDPsy Multi can create folders, but whenever it creates a folder, it becomes the exclusive owner of the folder.



All actions that it performs in the client's file will be linked to its name and to its professional ID number within the software.

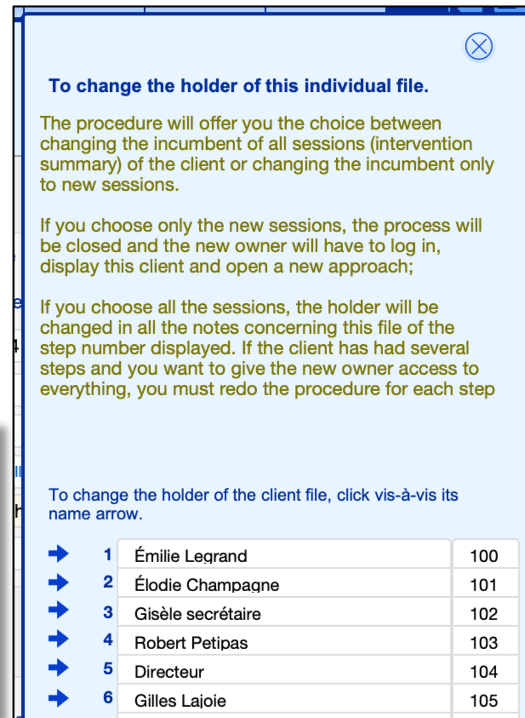
The logic of changing holder of an individual record takes into account the fact that the customer has already received services or not from the first holder assigned to him.

For example, if the file is created by an officer at the reception or by a secretary, the file will be assigned initially to this person, but it will not have made any intervention. So she will transfer the file to a therapist, and therefore "Change the holder" by giving access to "all" sessions.

In the same vein, if a client has started a follow-up with a psychologist who has completed his intervention but referred it to a social worker on the team: you can then use the "Change Holder" tool by giving him access only to new sessions.

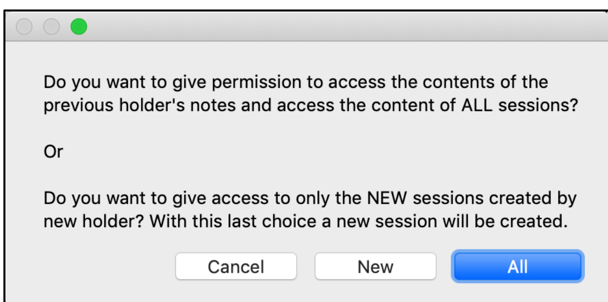
On the other hand, if it is an employee who leaves his position and is replaced by a new employee, the procedure is different, see below.

Keep access or not to the former therapist



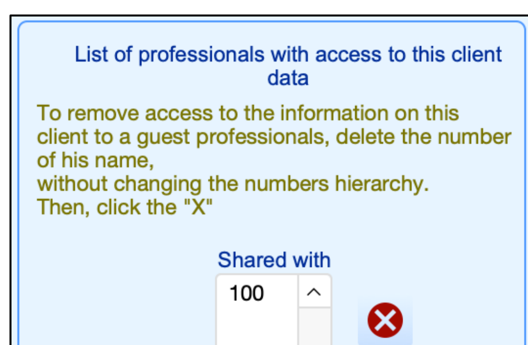
Click on the tool: « Change the holder », then
Click on the arrow next to the name of the professional you wish to assign to him or her as the holder or principal intervener in the list of registered professionals.

Before starting the procedure, it is important to read the explanation at the top of the window in order to remember the options and steps.



When you start the procedure to change the holder, a message asks you a question. For answering the question, you must ask yourself if the new file holder should have access to the former holder's notes.

If the answer is yes, you click on "All";



By clicking on "News". The process will be closed, and the new owner will have to log in, open a new approach in the client's file, and he will only have access to the sessions of the new approach.

In the example opposite, the "N ° 100" ID number corresponding to "Émilie Legrand" has been added in the shared access heading. And the process was closed.

So when Émilie Legrand connects, she will have to look in the list of "closed files" and open a new approach.

But Robert Petipas who was the previous holder will still have access but only to the notes of which he was the previous holder.

On the contrary, if you click on "All", all the contents of the file will be transferred to the holder level and the former owner will no longer have access to it.

When the secretary creates a file for a therapist, she must choose "All".

On the other hand, in the case of secretary-style access, she will still have limited access to the file she has assigned to another therapist.

Replacement of an employee

When a professional employee who has created records quits, we recommend that the manager ask him to close all his files in BaseDPsy before leaving.

If the departing employee has not closed their files, the manager will have to do so or ask us to do so, which may involve costs at the support rate.

When an employee leaves their job and is replaced by another person. The manager have to create an access in BaseDPsy.

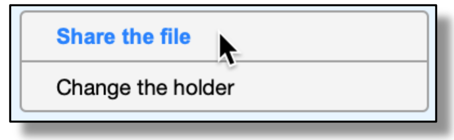
He must communicate with us to create this access.

In addition, the service manager must tell us if he wants the new employee to have access to the files and notes of the person who left.

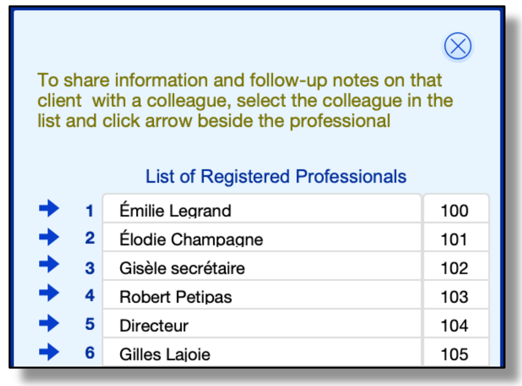
If the answer is no, we will give a new ID for BaseDPsy to the new employee and he will only have access to the new folders he will create.

If the answer is "yes", we will give him the ID of the employee who left, and so he will have access to everything the former employee had created. On the other hand, to provide services to the same clients, the new therapist will have to create a new approach within the same file.

25.2.5 Sharing a file



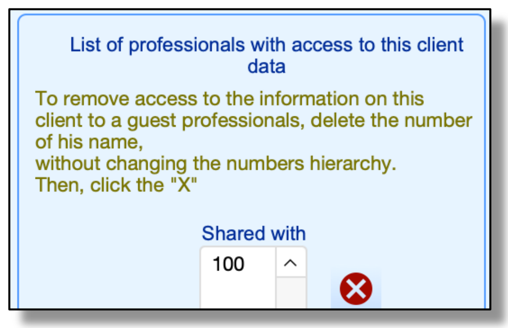
In a team, it is possible to intervene with more than one professional with the same client, especially when the professions are complementary. It is therefore desirable that professionals working with the same client can share information on their actions and their understanding of the needs and difficulties of the client.



That's why we have added a function to BaseDPsy Multi to share the file with one or more team members.

In order to share a patient file you must, again, display the "Files" section.
Then you locate the tool button named "Share the file"

Clicking the button displays a window. It contains the information you need to share the file. We even took care to write there the procedure.



In the window that appears, you will recognize the list of all professionals in your organization who have access to BaseDPsy. You find the professional with whom you want to share the folder, and you click the yellow arrow opposite its name. Then you close the window.

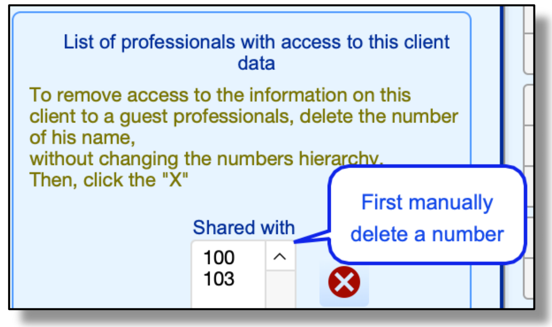
From now on, this professional will have access to the data on the client of which you are the owner, which includes the fact that this professional, when he will access BaseDPsy Multi, will also be able to see the name of the shared file in his list of clients.

The ID number (in BaseDPsy) of the professional will be added in the heading at the bottom of the tool window.

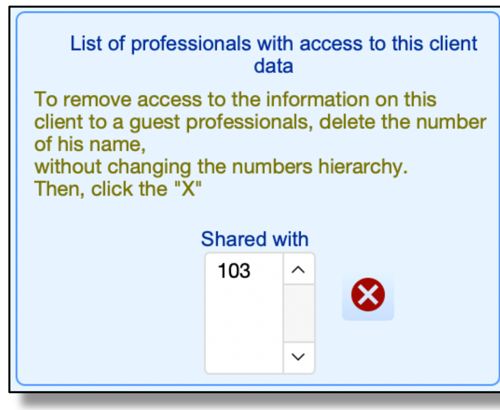
When a folder is shared, the specific signature of each professional included in the share is added when it adds a note to a shared folder.

25.2.6 Stop sharing a folder (cancel sharing of information)

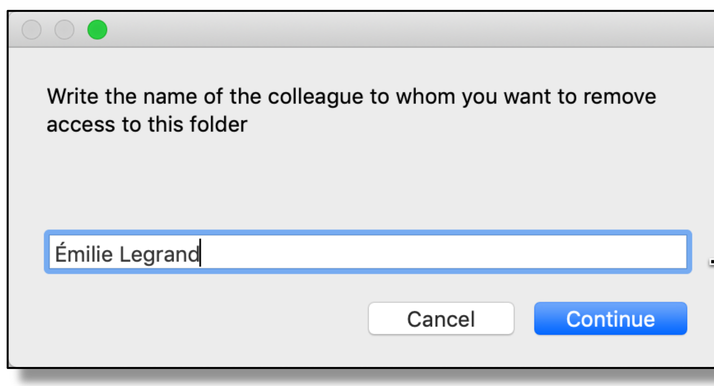
If after some time, or immediately after, for some reason, you want to cancel sharing a folder, you click the same button as to share it, and you focus your attention on the bottom of the window that s' displayed.



Another list displays the numbers corresponding to each of the professionals with whom you share the file. Delete the number of the professional with whom you want to cancel the folder sharing, then click the button with an "**X**" in its center. Then close the window.



After clicking on the "X", the procedure displays a window asking you to write the name of the professional with whom the file will no longer be shared. Click then on “Continue” and that's all.



25.3 Exporting a document from Documents case

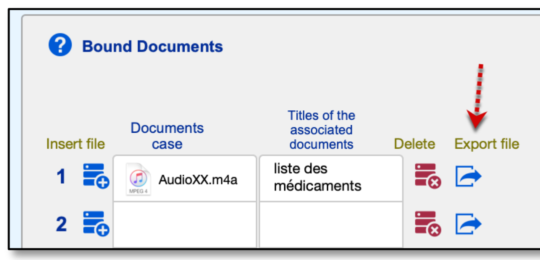
Because BaseDPsy Multi is installed on a remote computer to which you are connecting via the Internet from a local computer, you will occasionally have to navigate between the two computers to transfer documents produced or inserted into BaseDPsy.

But the Microsoft Remote App does not have the settings for direct export to the desktop of the local computer.

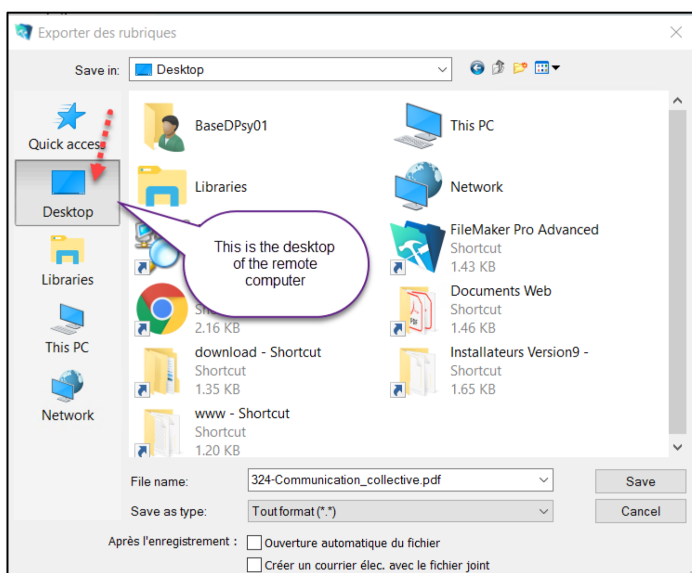
So when you export an associated document from the "Data" section, it will ask you by displaying a window where you want to export the document. You will then have to guide it to your local or remote computer according to your choice.

Here is the 8-step procedure:

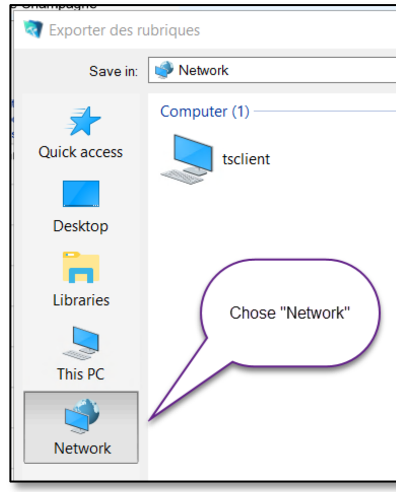
1. Use the tool to export the document



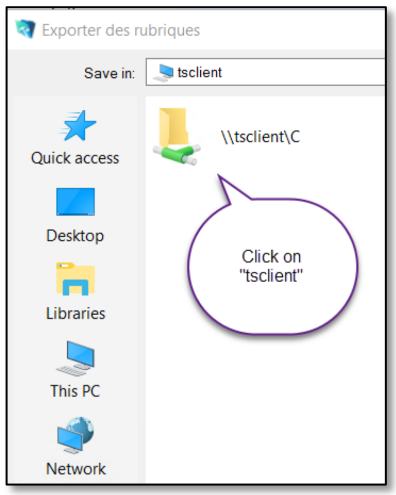
2. It may display the desktop of the remote computer by default. But you can also tell BaseDPsy the path to the desktop of your local computer. So, click on "Network" instead.



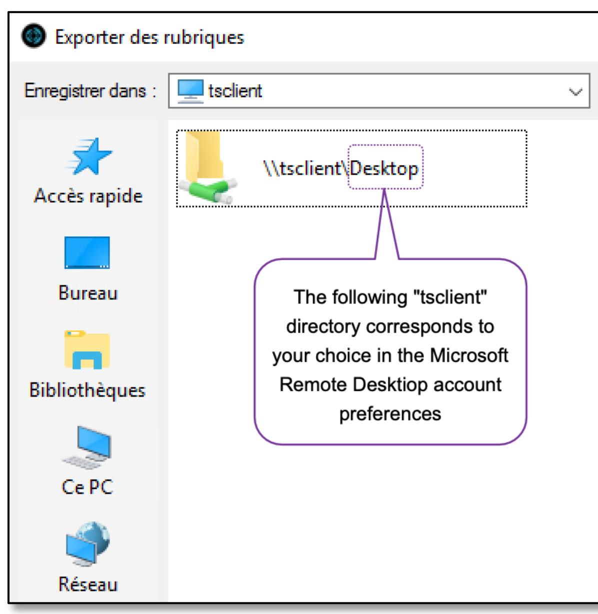
3. Choose "Network"



4. Then click on "tsclients"



5. The link will then be established with the directory you chose when setting up Microsoft Remote Desktop; here we chose the desktop but it could have been "Documents", etc.

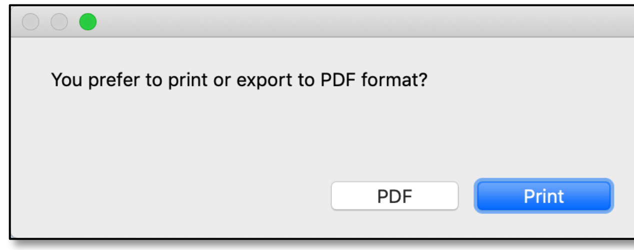


6. Click on the link (here: \\tsclient\Desktop) and the contents of your directory on your local computer will be displayed.

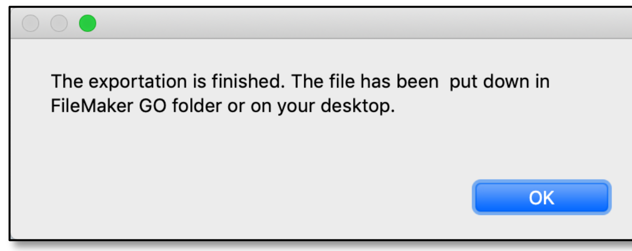
As a general rule, BaseDPsy will retain the information, and probably the next time you try to export or import, it will automatically display your local directory.

25.4 Save a document from a BaseDPsy procedure

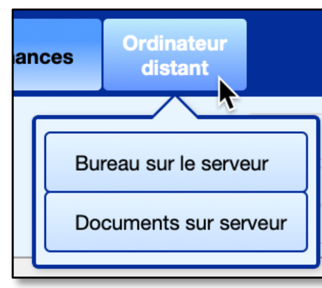
For example, if you request the printing of an invoice, the procedure will ask you if you prefer to print or export the invoice in PDF format.



If you choose "PDF", the document will be exported. The message says that it is exported to the desktop, but it will be the desktop of the remote computer (server).

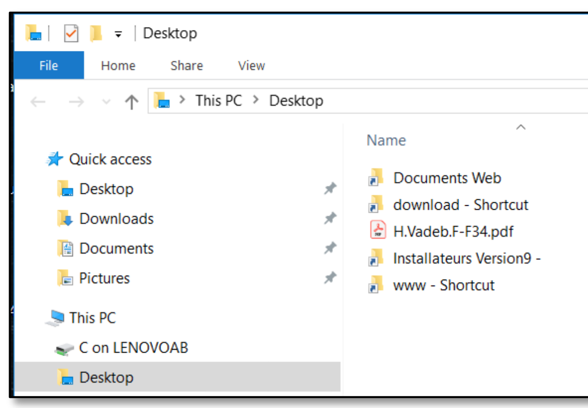


So you will need to recover the document on the desktop of the remote computer. This is where the tools included in the BaseDPsy header will be useful:

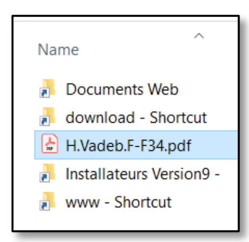


1. Click "Remote Computer" and then "Desktop on Server".

What will open a window. In the example, the invoice exported in PDF format is named "H.Vadeb.F-F34.pdf".



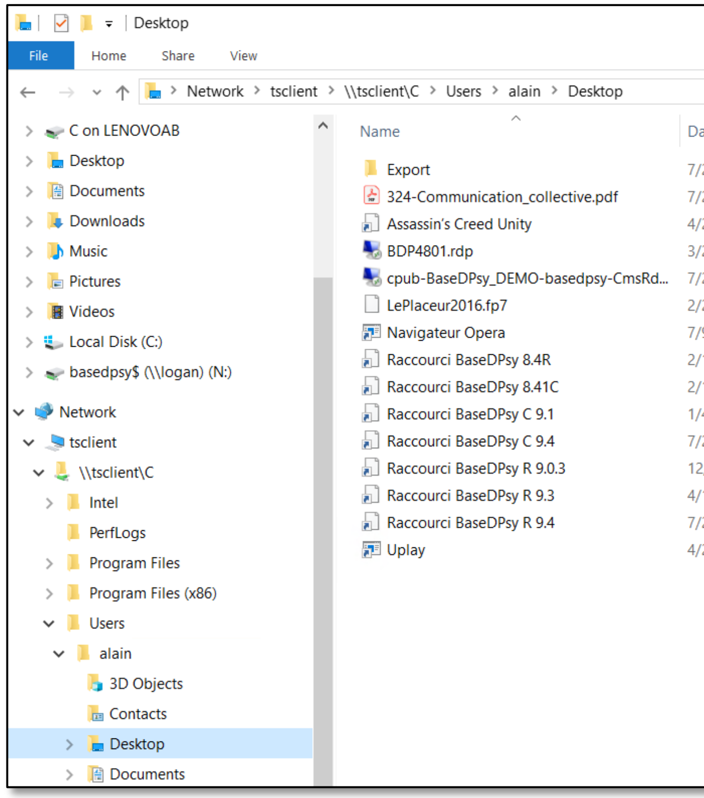
2. Select the document, then right-click on the tool to "Cut" the document (which is equivalent to copying it before deleting it).



3. Then you have to go "Paste" the document to your local office.

4. Click successively on the following choices to display the local desktop:
    - Network
    - tsclient
    - \\tsclient \ your repertory

5. Then with the right mouse button, paste the document to your local repertory.



Note:
It is important not to leave your documents on the remote desktop and always transfer them to your local computer, to make sure they will not be destroyed by the server routines.

To recover a folder or document left on the server, you use the same method as in the previous step (25.4.).

26. To get remote support

In addition to this manual, you will find on our website several tutorials (videos) explaining the main functions of BaseDPsy.

You may at any time, if the manual does not sufficiently answer your questions, send an email to Alain Barbeau to obtain assistance in using BaseDPsy. Assistance by email is free.

You usually get a response within 24 hours, except during holidays.

If the response by email is not satisfactory, you can then negotiate a assistance by phoneline or by using remote connection.

Remote connection allows Alain Barbeau to understand your difficulty, to make an assessment of the problem and tell you how to use BaseDPsy to prevent reoccurrence.

If your database has been damaged, it can also be repaired by Alain Barbeau, or to explain how to replace it by one of your backups uncorrupted.

Remote support, however, is be accompanied by financial costs. The rule is that the help is free if the problem is related to a programming error in BaseDPsy (a bug), but is not free if the problem is related to the use of BaseDPsy, or is the result of a malfunction the computer on which is installed BaseDPsy.

For remote assistance, you must install a program that allows a connection between two computers. This software is free for you. It is called "Teamviewer". It works on Mac and PC.

Here is the website address for download:

http://get.teamviewer.com/basedpsy_support

27. Using BaseDPsy on iPad

To determine the specificity of the use of the iPad, we suggest you search the internet or contact Apple support or FileMaker.
Our intention in this manual is limited to explaining the use of BaseDPsy.

However, here are some links to additional manuals for the iPad:
https://help.claris.com/en/go-help/

Here are some comments about BaseDPsy on iPad.

BaseDPsy was programmed to be used comfortably on iPad. All ergonomics elements of BaseDPsy have been designed, configured so as to be easily readable and usable on BaseDPsy.

Almost all interfaces allow easy use with the thumb, but in some, the amount of information to be displayed is so great that we had to reduce the size of the buttons (tools) or the space between them. For example, the space available for registration or billing of participants in the group therapy section. In these sections, it is preferable to use a stylus, though it is still possible to use only his fingers to navigate.

We also suggest you use the horizontal position when you change interface to expand it to a comfortable level. When you need to use BaseDPsy on an iPad in a vertical position, the previously viewing obtained persist with the horizontal expansion.

You can download " PsyTablet_XR " or " PsyTablet_XC " from BaseDPsy directly into the iPad from the website. You can also update BaseDPsy in the iPad.

However, to use BaseDPsy (PsyTablet) on iPad, you must install "Filemaker Go" before downloading PsyTablet. You can get Filemaker Go on the Apple Store.

"FileMaker Go" is required to "read" the data file of BaseDPsy, named « PsyTablet_XR» or « PsyTablet_XC ». Filemaker Go replaces the "Runtime" software that comes free when you buy BaseDPsy. See the chapter below that explains how to download PsyTablet directly to the iPad.

If you use another method that the directly download in your iPad from the Web site, you must know that in the folder of BaseDPsy, after installation, there different files : one contains the data (« PsyTablet_8 » or « PsyTablet_8C »), the other is the running software "Runtime", others are documents (. pdf) or link files (. dll) with Windows, or extensions.

Only one file should be transferred to the iPad, the file named « PsyTablet_XR » or « PsyTablet_XC ».

However, there are differences in behaviour BaseDPsy when used with FileMaker Go, FileMaker Pro or Runtime (BaseDPsy). We have summarized these differences in a table that you can read below.

27.1 Limitations or differences between using BaseDPsy on computer and on iPad.

BaseDPsy includes a "Database" called "PsyTablet.fmp12" whose programming is independent of the application to uses it, or to open it and to enter data.

There are three different applications that allow you to use the database "PsyTablet.fmp12 1" included when purchasing the BaseDPsy software. However, these three applications offer functions, features and different performance.
Two applications run on computer with Windows or Mac OS and the third is only available on iPad.

1. When you buy BaseDPsy, the application "runtime" (renamed "BaseDPsy") comes free with the purchase of the database "PsyTablet" data.
2. The "FileMaker Go" application is free and can be downloaded from iTunes or Apple Store.
3. The "FileMaker Pro" application is the most powerful of the three and offers the most options, however, you have to buy it regardless of BaseDPsy.
   https://www.claris.com/filemaker/

Table of behavioral differences:

Fonctions	Computer		iPad
	With the application « Runtime »	**With the application « FileMaker Pro »**	**With the application « FileMaker Go »**
PsyTablet sharing on network (immediate synchronization)	No	Yes, With PsyTablet installed in a hosting service	Yes, With PsyTablet installed in a hosting service
Printing summary statistics	Yes	Yes	No
Print summary statistics in PDF format	Yes (depending on whether the choice is offered to you by your	Yes	No (part: Only total and graphics are printed in PDF format)

Fonctions	**Computer**		**iPad**
	With the application « Runtime »	**With the application « FileMaker Pro »**	**With the application « FileMaker Go »**
	printer software or operating system)		
Preview mode pre print	Yes	Yes	No, but PDF display mode before printing is available
Conversion of PDF documents in preview mode	No	Yes	No
Printing PDF documents	Yes (depending on whether the choice is offered to you by your printer software or operating system)	Yes	Yes
Graphics display statistics or financial reports	No	Yes	Yes
Export or Save in Excel format	Yes	Yes	No
Visibility of tooltips (spontaneous support when overflying the topic title or the button tool)	Yes	Yes	No
Integration of electronic files (documents)	Yes	Yes	Yes, but in the case of files: limited to files that work with (open with) FileMaker Go
Inserting electronic files (Audio, Photos, Music, Videos, Signature)	Yes	Yes	Yes
Signature capture	Insert Image only	Insert Image only	Yes
Import records from another file or earlier version	Yes	Yes	No
Backup copy	Yes, with choice of destination folder for copying PsyTablet	Yes, with choice of destination folder for copying PsyTablet	Only when synchronizing your iPad with a desktop computer or with iCloud
Recovery (repair file)	Yes	Yes	No
Voice recording directly in a field	No, but you can insert an audio file recorded by third party software	No, but you can insert an audio file recorded with a third-party software	Yes

27.2 Window Display on iPad

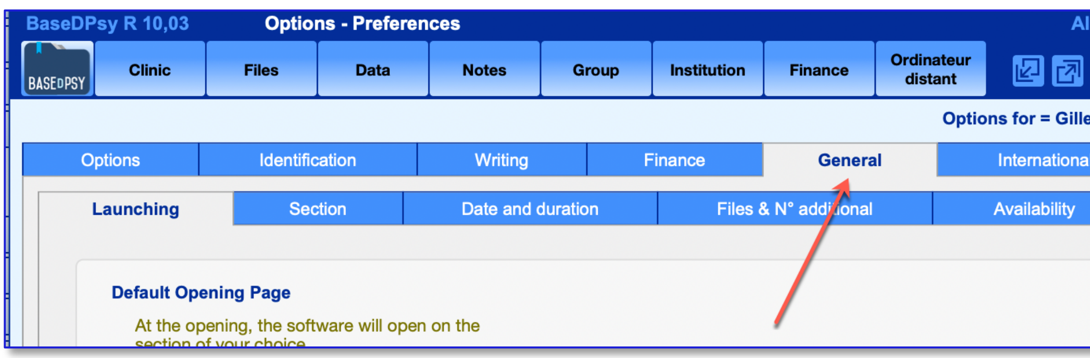
With the latest version of Claris FileMaker Go, it is now possible to display several BaseDPsy windows in the iPad.

This is particularly useful if you use the version of BaseDPsy with Agenda. It is also necessary to display the last new feature of version 10, the detachable list.

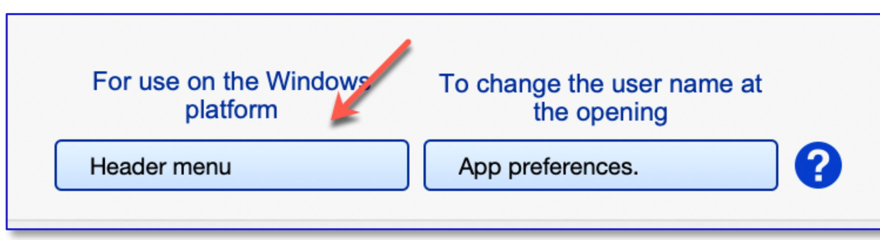
Here's how to proceed:

1. Display the "Options" section

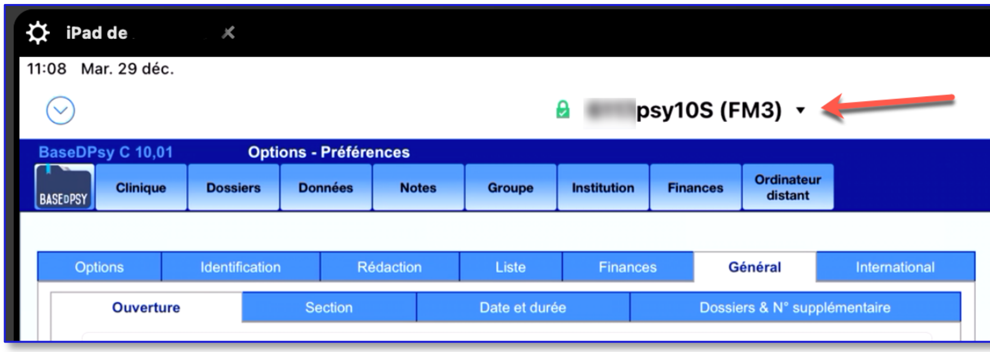
2. Display the contents of the General tab



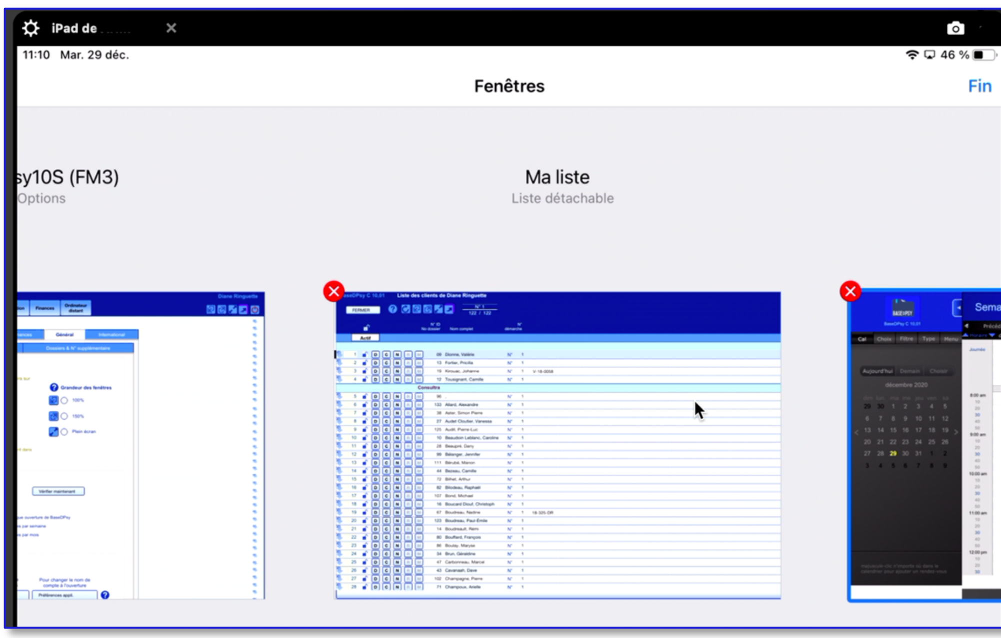
3. At the bottom of the window, tap on the "Header Menu" tool.



4. This will cause the window title to be displayed at the top of the blue BaseDPsy header, with an arrow pointing downwards.
   In this screenshot, the window title has been truncated by us.



5. Click on the title or the arrowhead to display the available windows. In the attached example, we have three windows open: The main file, the calendar and the detachable list.



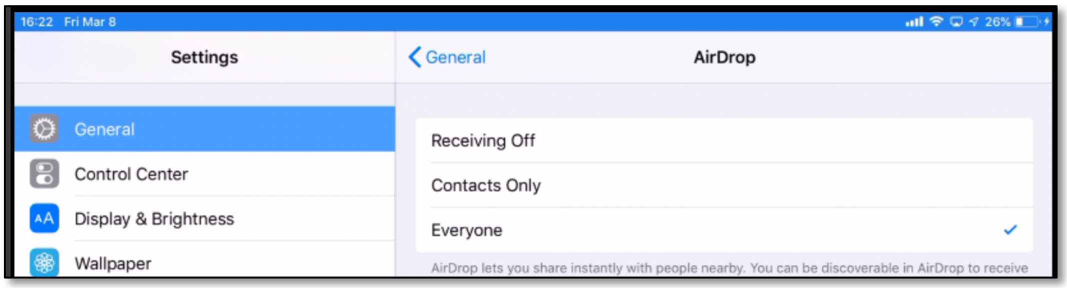
Then simply tap on one of the windows to bring it to the foreground.
Tapping on the red "X" closes the window.

Just tap on the window title again to display another window.

27.3 Transfer BaseDPsy to an iPad with Airdrop

This feature is available on Apple computers only and requires that you have previously downloaded BaseDPsy on your computer.

1. Open your iPad,
2. Display Settings,
3. Select General,
4. Select "AirDrop" and choose "Everyone" or "Contacts Only" depending on whether you are in the contact list in both devices.



5. Go back to your computer and click on the "AirDrop" menu to display the link with your iPad

6. Drag your "PsyTablet" file onto the icon representing your iPad.

7. Once the transfer is complete, the iPad will ask you what to open it: choose "FileMaker Go"

27.4 Downloading BaseDPsy on iPad with Safari

The following explanations apply equally to PsyTablet for ProScolR

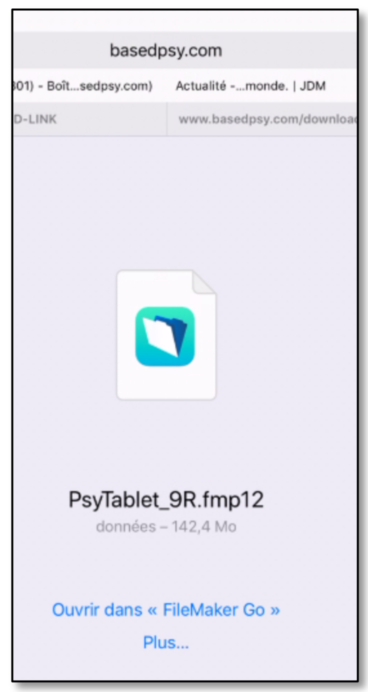
Before downloading BaseDPsy, download and install Filemaker Go 17 into your iPad.

The download on iPad is very long and often interrupted without notice.
The aternative is to download it to your computer and then transfer it to your iPad with "iTunes" (next chapter).

Here is the method:

On your iPad, open Safari (or other web browser) and go to the download page for BaseDPsy.

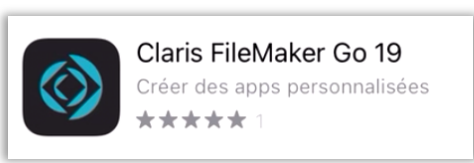
Then choose the download of the iPad format.



Once you touch the file, Safari launches download. The download takes several minutes. Eventually, there is no clue that your download is active.

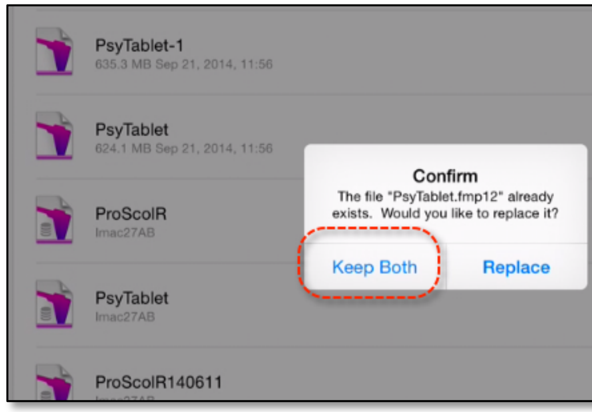
Once the download is complete, Safari asks you which application you want use to open PsyTablet_XR.fmp12 or PsyTablet_XC.fmp12. Click "Open in ..."

The IOS will offer you several choices of possible applications. Touch the icon of Claris FileMaker Go 19, (or Filemaker Go 18 if your iPad is too old).



If you have already downloaded PsyTablet, the IOS will ask you if you want to overwrite the previous one with the new or keep both.

When it comes to an update of BaseDPsy, hit "Keep both".



By default, Filemaker Go offers to open the last PsyTablet downloaded, even if you have more than one on the iPad.

When opening a new file, use the standard access codes: "Essai" as the account name, and "Demo" as the password.

27.5 Transfer BaseDPsy to iPad from a cloud service

1. Download BaseDPsy for iPad in the folder of your cloud service. The downloaded file is named " PsyTablet_XR.fmp12 " or PsyTablet_XC.fmp12 ".

2. Install the "Total files" application on your iPad from the App Store (Apple), where you will be able to access all your cloud services, such as DropBox, OneDrive, iCloud, etc., from your iPad.

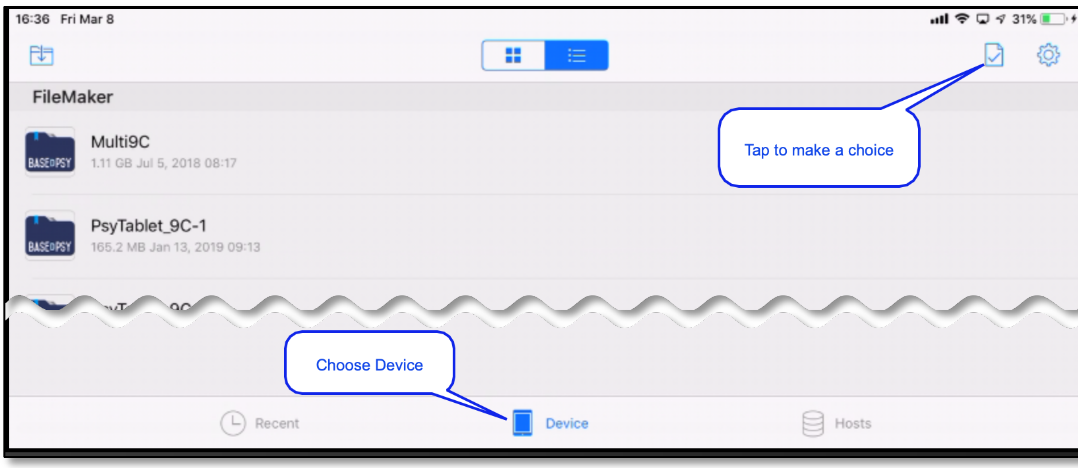
3. And so, you will be able to transfer the file PsyTablet_XR.fmp12 or PsyTablet_XC.fmp12 to the iPad.

4. Once in the iPad, open it with Claris FileMaker Go 19 (or Filemaker Go 18 if your iPad is too old)

27.6 How to delete a file on iPad with Filemaker Go

FileMaker Go provides you to view files that you have already opened recently, those present in the iPad and those available on a host server.

Click "Device" to display those present in the iPad, and click on the icon "Check" in the header menu to select the files to delete.



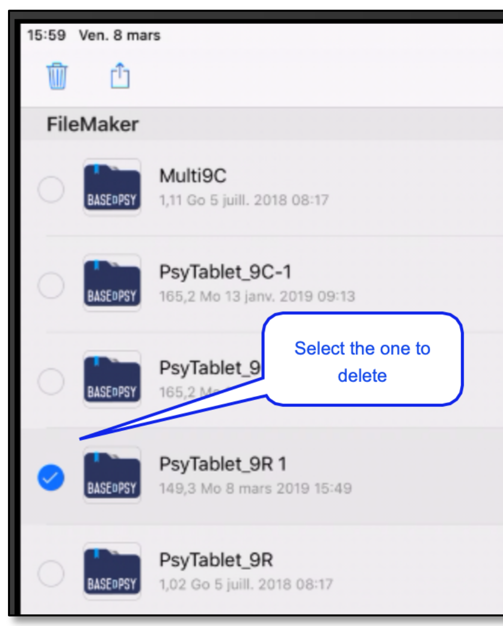
Also note that having downloaded several times PsyTablet, IOS has renamed to distinguish and keep them by adding a digit (« 1 » or « 2 ») after the name of the PsyTablet_7 downloaded.

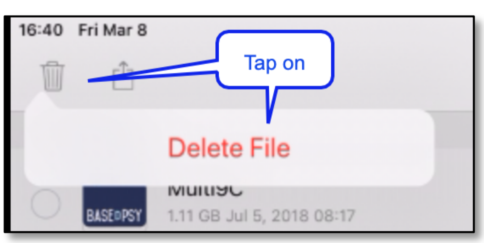
To delete files on the iPad with FileMaker Go, first click on the icon of editing files right at the top of the window

This has the effect of displaying the selection tools to the left of each file.

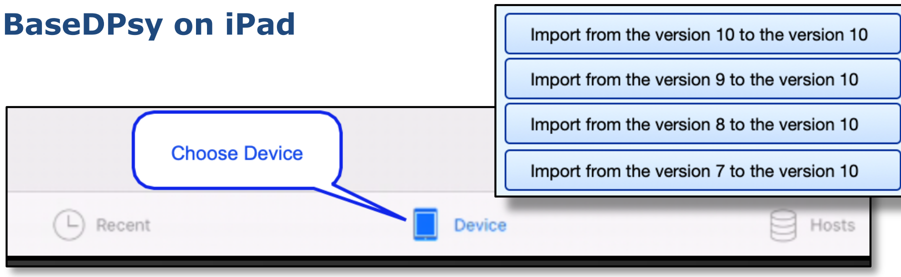
Select the ones you want to delete.

Then tap the trash icon.



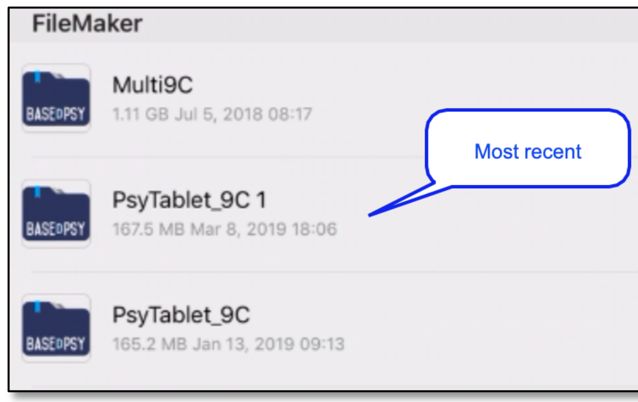


27.7 Updating BaseDPsy on iPad



You must have downloaded or transferred PsyTablet to your iPad before beginning these procedures.

Open FileMaker Go, and tap the "Device" button to view the files available on your iPad.

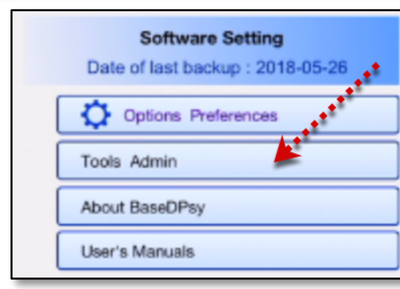


1. If you have multiple files with the same name, the iOS will have added a "1" to the most recent file.

2. Open the most recently used file containing the data you want to transfer.

3. Touch the title to open. And enter your personalized access codes.

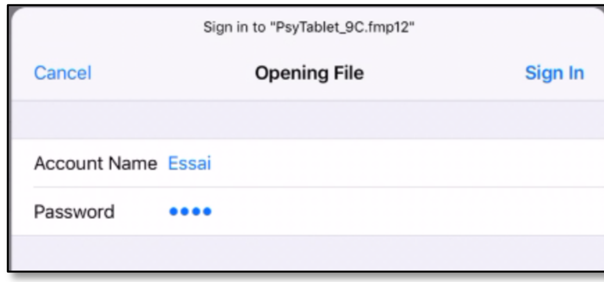
4. Once the file is open, go to the "Admin Tools" section



5. Tap the tool: "Prepare this database for transferring folders to a newer version"

6. Touch "OK" on the message that appears and explains the usefulness of the tool. PsyTablet closes after the completion of the preparation procedure.

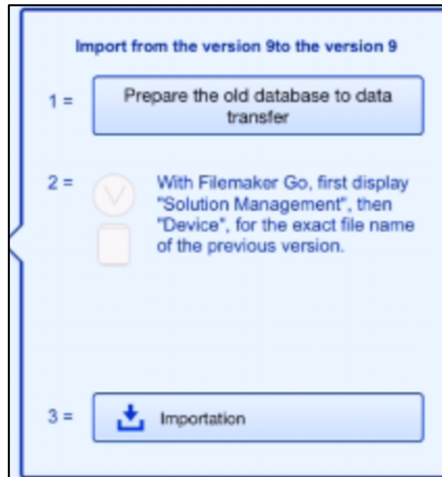
7. Touch the Filemaker GO tool labeled "Device" again. Then open the empty file, the newly downloaded file; in the example, it is called "PsyTablet_9C".



8. Since this file is empty, you will then have to follow the procedure for registering the license after having opened it with the "Trial" and "Demo" access codes. The registration process ends with the creation of your custom credentials, and then PsyTablet closes.

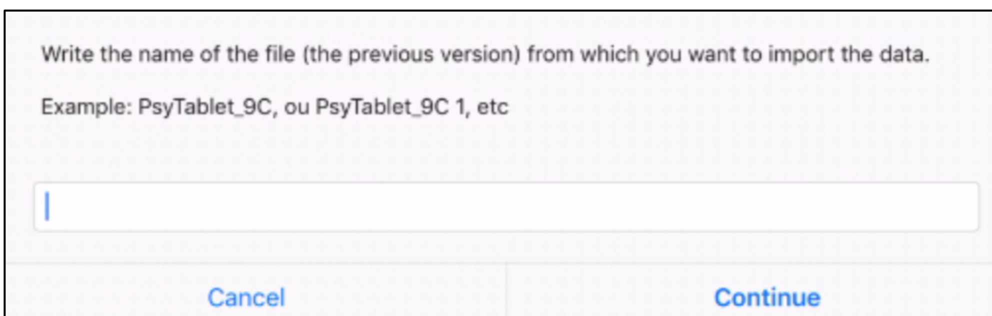
9. Re-open the PsyTablet you just registered with your custom access codes, and go to the "Admin Tools" section.

10. Touch the "3 = Importation" button.



11. Enter your personalized access codes.

12. This step is the most important to avoid problems in the import. The procedure asks you to identify the file from which you want to import data. Make sure you write the file name. In version 9, the file is named "PsyTablet_9" or "PsyTablet_9C".



13. If you make a mistake in the name and FileMaker Go does not find the file, it will ask you to identify it by displaying the list of files available on your iPad. If you do not make a mistake, the import starts.

14. An end-of-import message appears, touch "OK" and PsyTablet closes; FileMaker Go redisplays the recent files page.

15. Reopen it to start using it.

28. Using BaseDPsy on multiple remote computers without network

As BaseDPsy is registered in the name of the user, the license allows you to install it on as many computers as you want, but you must use the same license number and the same professional name for using it.

Some therapists work in many places such as: at home office, at town office and at community center.

If this is your case, you might want to always use the same data, the same BaseDPsy, from one place to another.

The simplest method is obviously installing BaseDPsy on a laptop and to bring the laptop in each separate offices.

But it also happens that some therapists have a different computer in each office they use. In this case, when wanting to use the same BaseDPsy, a few different methods are available.

28.1.1 Use BaseDPsy hosted on an internet server

BaseDPsy, in partnership with Somi-t, offers an exclusive professional hosting service for your solution and the uncompromising protection of your clinical data.

This service offers several advantages:

1. Access any time, no matter where you are as long as you have access to the Internet. No need for special software installed on the device;
2. Access from all types of devices: desktop or laptop Windows or Mac, tablets using iOS (iPad) or Windows;
3. Several daily backups protect you against the loss or unintentional deletion of data. It is a more complete protection and avoids the pitfalls of human error. You are thus protected against the breakage of your computer, against the loss or theft of the device, the USB key or the external hard drive that serves as backup;
4. Use of BaseDPsy in hosting mode also provides access to features not available with BaseDPsy Solo, namely: displaying graphics, automatic PDF export of documents (invoices, reports, etc.) without the need to switch by the virtual printer;
5. The monthly subscription to the professional hosting service saves you all the hassle of a local server including costs related to the maintenance and protection of equipment, subscription to the various licenses required such as Microsoft Windows Server and Terminal Services, FileMaker® Pro and FileMaker® Server, antivirus software, etc .;
6. Allows our staff to intervene quickly and directly in your copy of BaseDPsy to correct a problematic situation or simply be useful.

28.1.2 Installing BaseDPsy on an external medium

The easiest method is to install BaseDPsy on USB key. The major drawback is the slowness of some USB keys compared to the speed of a hard disk. Second drawback, a USB key gets lost easily, so always make sure you have a backup copy elsewhere on the USB key.

The same result is obtained with an external hard drive, which can be connected to different computers. Again, make sure you make regular backups.

If you must use BaseDPsy on several computers of different platforms, some additional operations will be needed.

For example, suppose that your computer to the clinic is running on Windows 10 and your home computer works with Mac OS.

You will need to install BaseDPsy twice, once for each platform.

1. Plug your USB drive (or external hard drive) on the Windows computer ;
2. Install BaseDPsy for Windows on USB key;
3. Add the letters " Win " at the end of the folder name BaseDPsy . This will give : BaseDPsy7Win
4. Carry your USB key on the computer using Mac OS;
5. Reinstall BaseDPsy for Mac on USB key;
6. Add the letters " Mac " at the end of the folder name BaseDPsy .
7. In each folder that you just installed , there is a file named " PsyTablet.fmp12 ." The extension ". Fmp12 " might not be visible on any computer with the settings saved on each computer .
8. In one BaseDPsy files , delete the " PsyTablet_7 " file
9. When you use Windows BaseDPsy , place the " PsyTablet_7 " file in the " BaseDPsy7Win " folder.
10. When you use BaseDPsy on the computer running Mac OS 10.11, drag the " PsyTablet_7" file in the " BaseDPsyMac " folder.
11. Before each use , make a backup copy of PsyTablet.fmp12 on your computer (apart from the USB key) .