



BaseDPsy 10 (PsyTablet)

Main new features

These improvements follow a survey (October 4, 2020) made with several hundred users of version 9, who sent us about fifty suggestions; all the feasible ones have been integrated, that is to say nearly fifty improvements.

The new features described below are those added since version 9.81

1. Increase the speed of the most frequent actions

- **NAVIGATION.** A detachable list of clients that allows you to display any client in any of the sections, without having to reopen a list when you change clients (instructions = p. 17);
- **INVOICING.** You can, with one click, invoice the client and print the receipt when the default values have been saved in BaseDPsy (instructions for use = p. 187); (Simplified and quick sending of documents, invoices or receipts by e-mail is available to those who use our hosting service)
- **WAITING LIST.** Automatic registration of the external debtor when you create a file from the waiting list; Automatic sorting to place those on hold, at the top of the list, when the list is opened (instructions for use = p. 133);
- **Appointment Reminder.** You can set up automatic appointment reminders for your customers using an SMTP address that does not require double authentication like gmail. (An SMTP address meeting this criterion will be provided free of charge to those who use our hosting service) (instructions for use = p. 117-122);
- **FRAME.**
 - You can change your frameworks when you write a follow-up note without having to leave the writing interface;
 - You can add a framework from the follow-up note writing without leaving the interface (instructions for use = p. 104-105);
- **FOLDER.** You can print the whole file in one operation when you have to present the file to a third party (client, court, etc.) (instructions for use = p. 62);
- **SENDING documents by email:** a tool is added to the toolbar that accompanies the preview of a document in order to send the document by email; only functional if you have an efficient SMTP address like the one provided by our hosting service.

2. Addition of new functions

Waiting list (instructions for use = p. 133):

- Added a search tool by last name;
- Grayed out names when a removal date has been added;

Files :

- Roadmap: tool for creating a chronological record of all actions taken within a single record in accordance with the requirements of the College of Psychologists (instructions for use = p. 67);
- Addition of a field for a file closure note with the framework tool;
- Added the framework tool in Observations-Comprehension;

Notes : Added tool to read all session summaries one after the other, including personal notes, as desired;

Client Communications: Added tools for using frameworks;

Debtors :

- Added 3 invoice templates with editable headers and footers in the Options section (instructions = p. 217);
- Addition of an external template: the one from the Secrétariat du Conseil du Trésor du Québec (instructions for use = p. 225);
- The debtor's rate is now entered in the Debtor section as a default value that is automatically entered in a new EAP mandate (instructions for use = p. 215);

Financial Reports: Added an annual revenue report by referrer and client;

Invoicing: Invoices due: added the possibility to filter the list by year;

Taxes : Added an alternative tax (third tax -TVH that replaces the first tax - TPS) depending on the client; useful for those who work near borders (instructions for use = p. 176);

3. Improvements not described

About 20 minor improvements have also been made in version 10 of BaseDPsy, for example:

- The list of monthly birthdays is added to the Menu section;
- Redesign of the SMTP sending parameters;
- Addition of a financial report on revenues by referrer;

See also new features in previous version (in French)

Update of [version 8](#)

Alain Barbeau, 22 janvier 2021