

CSNTrac

Financial Management software for
Christian Science Nurses

Tutorial

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CSNTrac Tutorial

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

Videos are at: <http://rayoflightsoftware.com/videos.html>

Overview

Goal of the app

CSNTrac is an easy to use mobile app that provides comprehensive financial management for private practice Christian Science Nurses

The following is a conceptual overview of the app

Christian Science nurses perform four activities related to financial management



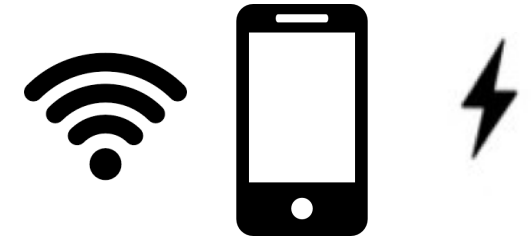
Care



Patient Expenses



Patient Payments



Business Expenses

Each one of these four activities is entered as daily transactions in the app

If you enter these four types of data, then

1. Invoices
2. Patient Statements
3. Financial Reports

will be generated for you

Data entry and these three outputs give you all the tools
you need to simplify your entire practice's financial
management

Care and Patient Expenses = Invoices



Care Patient Expenses



Invoice		
<div>Mary Thompson, Christian Science Nurse Remit to: Mary Thompson, 1435 Main St, Apt 2B, South Hampton NJ 28822</div> <div>552-342-5999 mathenydale@gmail.com, rayoflightsoftware.com</div>		
<div>Ann Smith 234 Smith Dr, Lansing, MI 55343 asmith@gmail.com</div>		<div>Invoice No: 2 December 3, 2022</div>
For Christian Science Nursing		
Services		
Service, 12 hours @ \$50.00/hour		\$600.00
Dec 1 2022, 9.0 hours 7:38 AM-4:38 PM		\$450.00
Dec 2 2022, 3.0 hours 3:00 PM-5:55 PM		\$150.00
Expenses		
Supplies		\$48.66
Dec 1 2022, Bandages		\$24.33
Dec 2 2022		\$24.33
Travel Expenses		
Tolls		\$7.00
Dec 1 2022		\$3.50
Dec 2 2022		\$3.50
Mileage, 68 Miles @ \$0.625/Mile		\$42.50
Dec 1 2022, 34.0 Miles		\$21.25
Dec 2 2022, 34.0 Miles		\$21.25
Total Travel Expenses		\$49.50
Total Invoice		\$698.16
Prior Balance Due		-\$120.00
Balance Due		\$578.16
"for he careth for you." (1 Peter 5:7)		

Invoices & Payments create Patient Statements

Patients

Select Another Patient

DashboardStatement

Mary Thompson, Christian Science Nurse
1435 Main St, Apt 28, South Hampton NJ 08822
552-342-5999
matherydale@gmail.com

Dec 2, 2022

Statement for Jeff Richardson
Jeff Richardson
1 Main St., Northchester, New York 15511
jsoutherland@gmail.com

Date	Description	Amount	Net Due
Nov 1, 2022	Invoice #1 for Nov 1-Nov 30	\$639.38	\$639.38
Nov 27, 2022	Payment Check from Patient	-\$100.00	\$539.38
Dec 1, 2022	Payment Check from Patient	-\$100.00	\$439.38
Total left to pay			\$439.38

Date	Description	Amount	Net Due
Nov 27, 2022	Payment Check from Patient	-\$100.00	-\$100.00
Nov 28, 2022	Invoice #1 for Nov 1-Nov 30	\$639.38	\$539.38
Dec 1, 2022	Payment Check from Patient	-\$100.00	\$439.38
Total left to pay			\$439.38

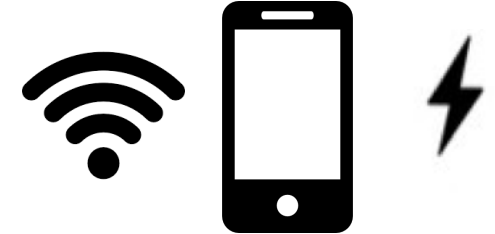
Financial Reports

Mary Thompson, Christian Science Nurse
1435 Main St, Apt 2B, South Hampton NJ 28822

552-342-5999
mt@gmail.com

Income Statement for Jan 1, 2022 to Dec 31, 2022

Income	
<i>Payment</i>	\$1,144.97
<i>Travel reimbursement</i>	\$412.50
Total Income	\$1,557.47
Expenses	
Insurance	\$234.00
<i>General liability insurance</i>	\$234.00
Advertising	\$350.00
<i>Journal listing</i>	\$350.00
Utilities	\$50.00
<i>WiFi</i>	\$50.00
Commissions and Fees	\$0.00
<i>Payment transaction fee</i>	\$0.00
Total Expenses	\$634.00
Net Income	\$923.47



Patient Payments - Practice
Expenses
= Net Income

Getting the App

1. iPhone & iPad at: tinyurl.com/57zm2whv

OR

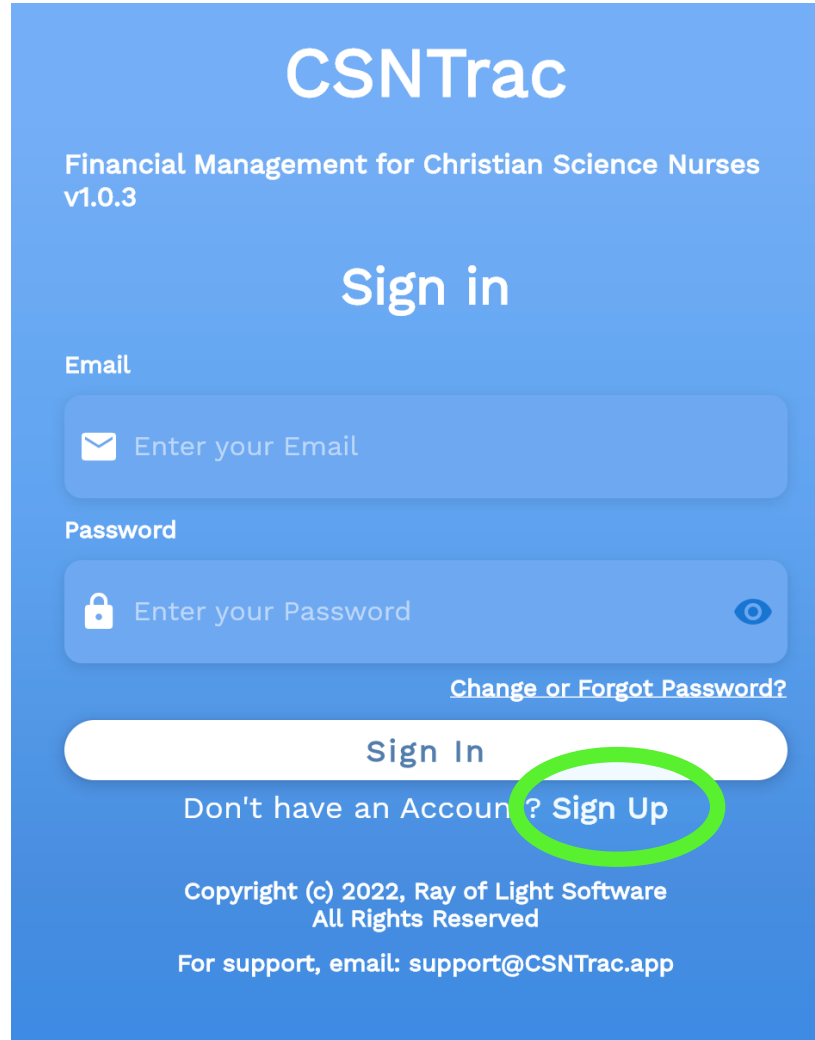
2. Android devices: search *CSNTrac* on Google Play Store

OR

3. WEB at: csntrac.app

Signing up*

**The app will be free until July 2023 and then a \$45/year subscription will be charged.*

The image shows the CSNTrac login and sign-up interface. At the top, it says "CSNTrac" in large white letters, followed by "Financial Management for Christian Science Nurses v1.0.3" in smaller white text. Below this is a "Sign in" section with two input fields: "Email" with a placeholder "Enter your Email" and an envelope icon, and "Password" with a placeholder "Enter your Password" and a lock icon. To the right of the password field is an eye icon for toggling visibility. Below the password field is a link that says "Change or Forgot Password?". At the bottom of the sign-in section is a white button with the text "Sign In". Below the button is a link that says "Don't have an Account ? Sign Up", where "Sign Up" is circled in green. At the very bottom, there is copyright information: "Copyright (c) 2022, Ray of Light Software All Rights Reserved" and a support email: "For support, email: support@CSNTrac.app".

CSNTrac

Financial Management for Christian Science Nurses
v1.0.3

Sign in

Email

Enter your Email

Password

Enter your Password

[Change or Forgot Password?](#)

Sign In

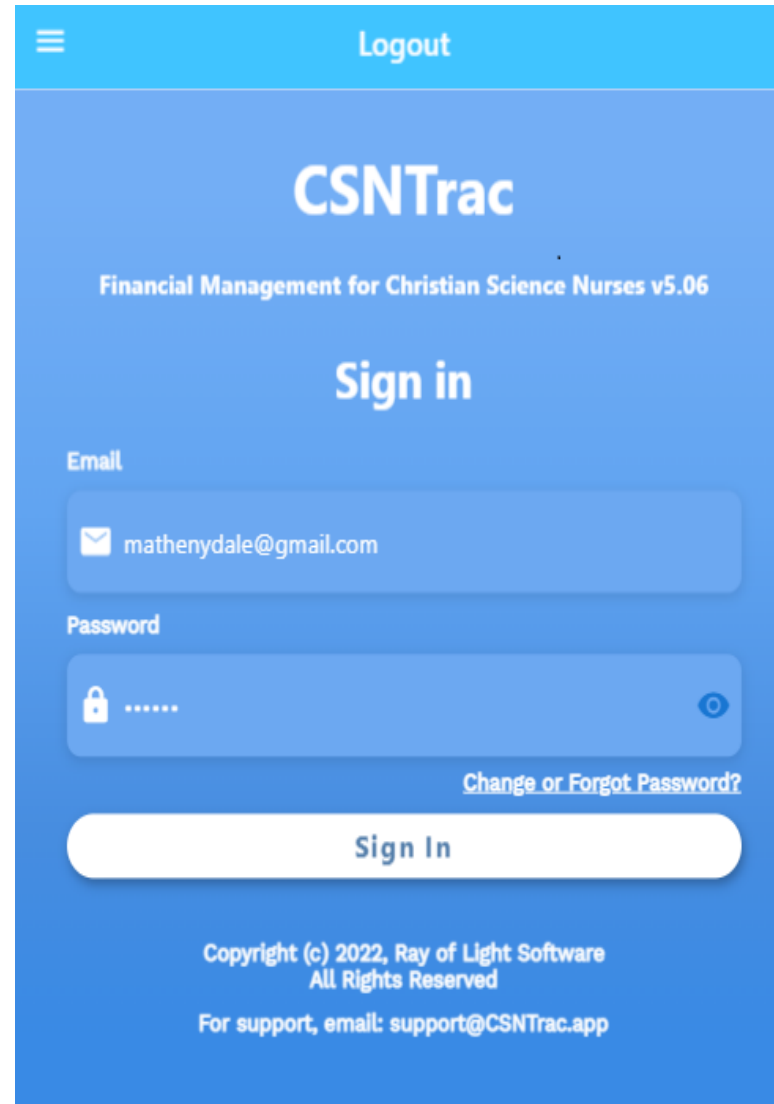
Don't have an Account ? [Sign Up](#)

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All Rights Reserved

For support, email: support@CSNTrac.app

1. Go to web browser and type: csntrac.app
2. Click the **Sign Up** button and fill in the form to create an account.
1. An authorization email will be sent to you (check spam folder if needed).
1. Click the link in the email and then you can sign into the app.

Signing in



The image shows the login screen of the CSNTrac app. At the top, there is a blue header with a hamburger menu icon on the left and the word "Logout" in the center. Below the header, the app's name "CSNTrac" is displayed in large white letters, followed by the subtitle "Financial Management for Christian Science Nurses v5.06" in smaller white text. The main heading "Sign in" is centered below the subtitle. There are two input fields: "Email" with a light blue background and a white envelope icon, containing the text "mathenydale@gmail.com"; and "Password" with a light blue background, a white lock icon, and a white eye icon for toggling visibility. Below the password field is a link that says "Change or Forgot Password?". A large white "Sign In" button is centered below the input fields. At the bottom, there is copyright information: "Copyright (c) 2022, Ray of Light Software All Rights Reserved" and a support email: "For support, email: support@CSNTrac.app".


Logout

CSNTrac



Financial Management for Christian Science Nurses v5.06

Sign in

Email

 mathenydale@gmail.com

Password

[Change or Forgot Password?](#)

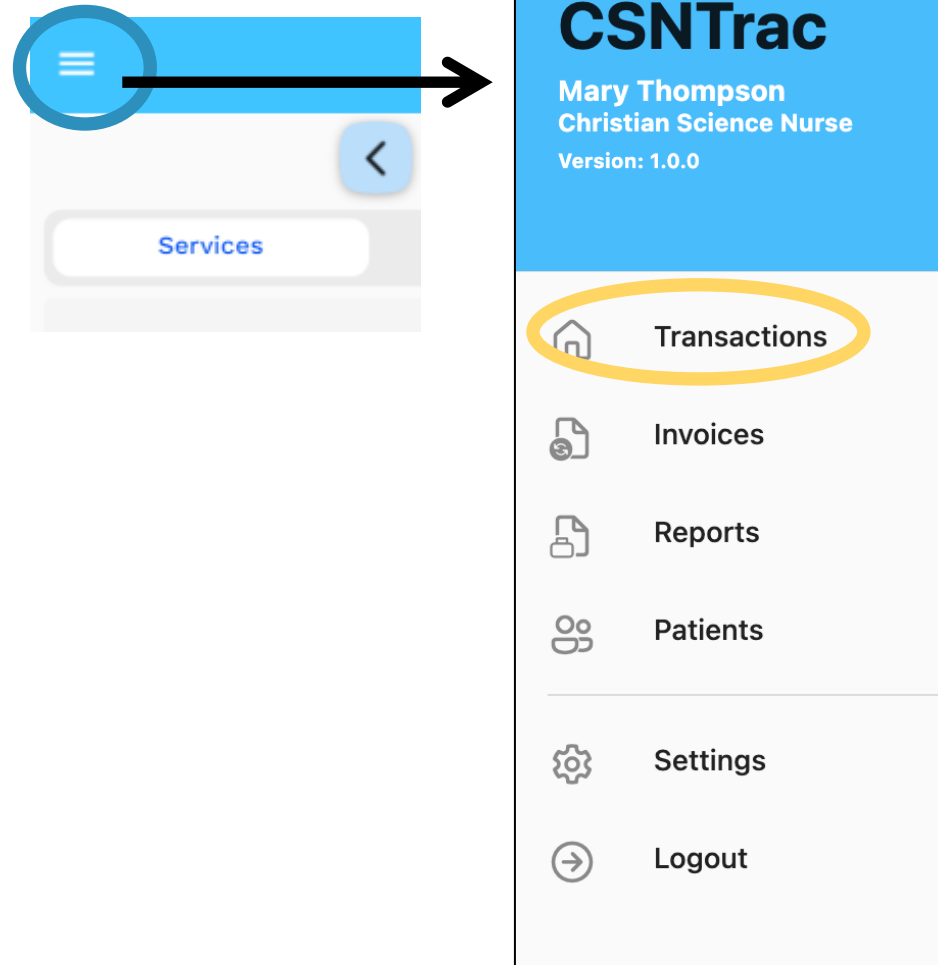
Sign In

Copyright (c) 2022, Ray of Light Software
All Rights Reserved

For support, email: support@CSNTrac.app

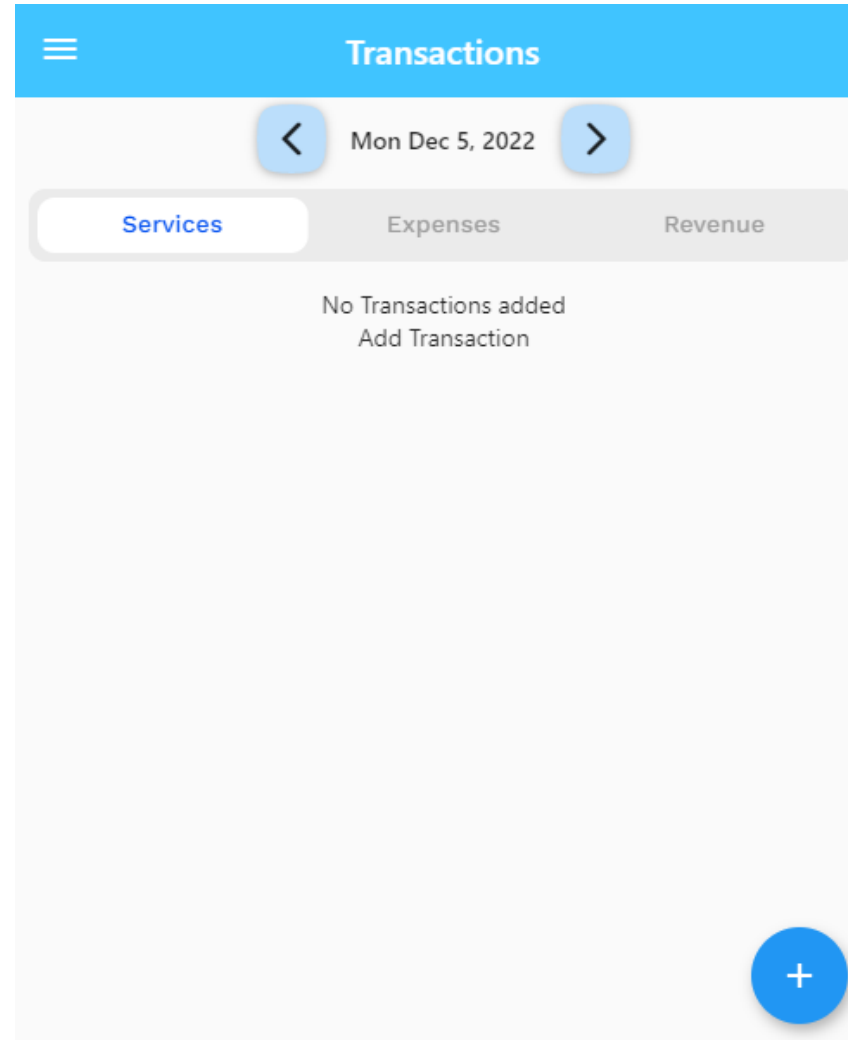
Open the app and type your email and the your password. Press "Sign In" button.

Navigating CSNTrac



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

Transactions screen



The Transactions screen is where all data entry occurs.

The app uses a calendar for data entry. A single day is shown at a time.

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

Setup: User Profile Settings Screen

The screenshot shows a mobile application's 'Settings' screen with a blue header. Below the header is a tab bar with four options: 'Profile' (selected), 'Events', 'Billing', and 'Invoice'. The 'Profile' tab contains a form with the following fields and values:

- Name: Ann Holiday
- Title: Christian Science Nurse
- Email: annholiday@gmail.com
- Phone: 234-552-5234
- Address: 1453 Roadway, Apt 2b, South Hampton, NJ 34452
- Website: annholidaycsn.com
- Bio: God is Love

A blue 'Save' button is located at the bottom center of the screen, highlighted with a yellow circle.

Navigate to the Settings Screen

Enter contact information on Profile tab and press Save button

Setup: Checking rates

The screenshot shows a mobile application interface for 'Settings'. At the top, there is a blue header bar with a hamburger menu icon on the left and the word 'Settings' in the center. Below the header, there are four tabs: 'Profile', 'Events' (which is selected and highlighted in blue), 'Billing', and 'Invoice'. Under the 'Events' tab, the section is titled 'Services' with a blue plus icon to its right. There are three service entries listed:

Name	Category	Input	Rate	Per
Care Review/Assesment	Service	Timeframe	25	Hour
Travel time	Service	Timeframe	25	Hour
Daily Rate	Service	Fixed	600	

Each service entry has a blue pencil icon to its right, indicating it can be edited.

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

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

- Modify service rates
- Modify expense mileage rate
- Enter new custom expense or service types

Default Patient care service types and rates

Service Type	Default Rate (Change in Settings/Events tab)
Service	\$50/hour must set start and end times
Care/Review Assessment	\$25/hour; set start/end times
Daily Rate	\$600
Overnight	\$350
Interrupted Rest	\$75/hour; set start/end times
Travel Time	30/Hour; set start/end times

Modifying a rate for a service or expense

Edit Services Type

Name
Travel time

Category
Service

Input type
Timeframe

Rate
25

Per
Hour

Cancel Save

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

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

CSNTrac Tutorial

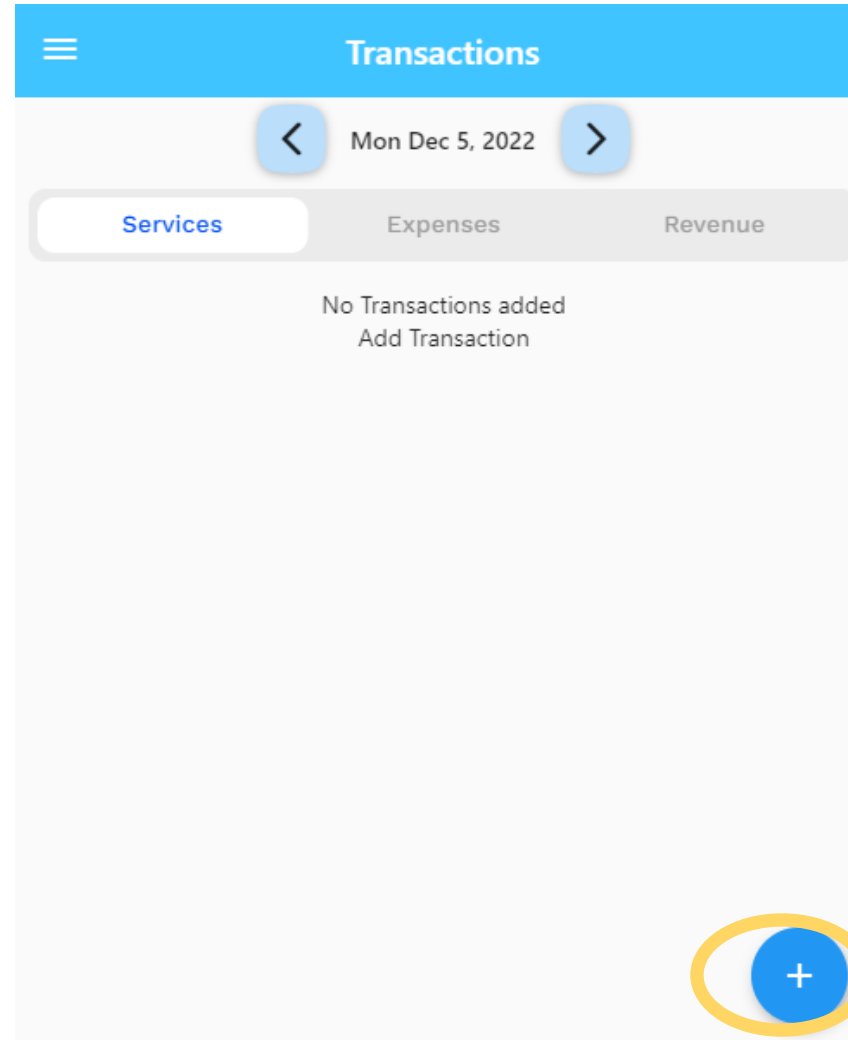
1. Getting Started
2. **Patient Services and Expenses**
3. Invoicing
4. Payments and Patient Statement
5. Financial Management

THE SCENARIO: YOU VISITED PATIENTS
OVER THE LAST TWO DAYS AND HAVE
TRAVEL EXPENSES.

LET'S UPDATE CSNTRAC WITH YOUR
WORK

Videos are at: <http://rayoflightsoftware.com/videos.html>

The Transactions screen



- 95% of time spent in app is on this screen. Once data is entered in this screen generation of invoices and repots is automatic.
- Organized by day and three types of transactions: Services, Expenses, Revenue.

Actions

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

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

1. From *Services* tab, tap on blue + icon to add an entry.

Add a patient service

The screenshot shows the 'Add Service' form within the 'Transactions' app. The form has three tabs: 'Services', 'Expenses', and 'Revenue'. The 'Services' tab is selected. The form contains the following fields:

- Patient:** A dropdown menu with 'Ann Smith' selected. A blue arrow points to this field.
- Services Type:** A dropdown menu with 'Service' selected. A blue arrow points to this field.
- Service Timeframe:** Two green buttons for 'Start' and 'End'. The 'Start' button shows '7:38 AM' and the 'End' button shows '4:38 PM'. A blue arrow points to the 'End' button.
- Buttons:** At the bottom are 'Cancel' and 'Save' buttons. The 'Save' button is circled in yellow, and a blue arrow points to it.

A blue plus icon is visible in the bottom right corner of the app interface.

1. Select patient (see next slide on adding a patient if you haven't added them into the app yet).

1. Select service type.

2. Set start and end times of service

3. Save

This inset screenshot shows a 'Time Picker' dialog box titled 'Enter End Time'. It features a digital clock interface with the time set to 4:38. The 'Hour' is 4, the 'Minute' is 38, and 'PM' is selected. There are 'CANCEL' and 'OK' buttons at the bottom.

Add a new patient

Transactions

Thu Dec 1, 2022

Services Expenses Revenue

Add Service

Patient: Ann Smith [New](#)

Services Type: Service

Service Timeframe
Start: 7:38 AM End: 4:38 PM

Cancel Save

Add Patient

Ann Smith

asmith@gmail.com

244-234-11344

234 Smith Dr, Lansing, MI 55343

Cancel Save

- Click *From Contacts* on mobile app to select existing contact and add to the application as a patient.
- On the WEB, click *New* to add name, email, contact, address for a new patient in the dialog as shown above (right).
- Press *Save*.

View service entry

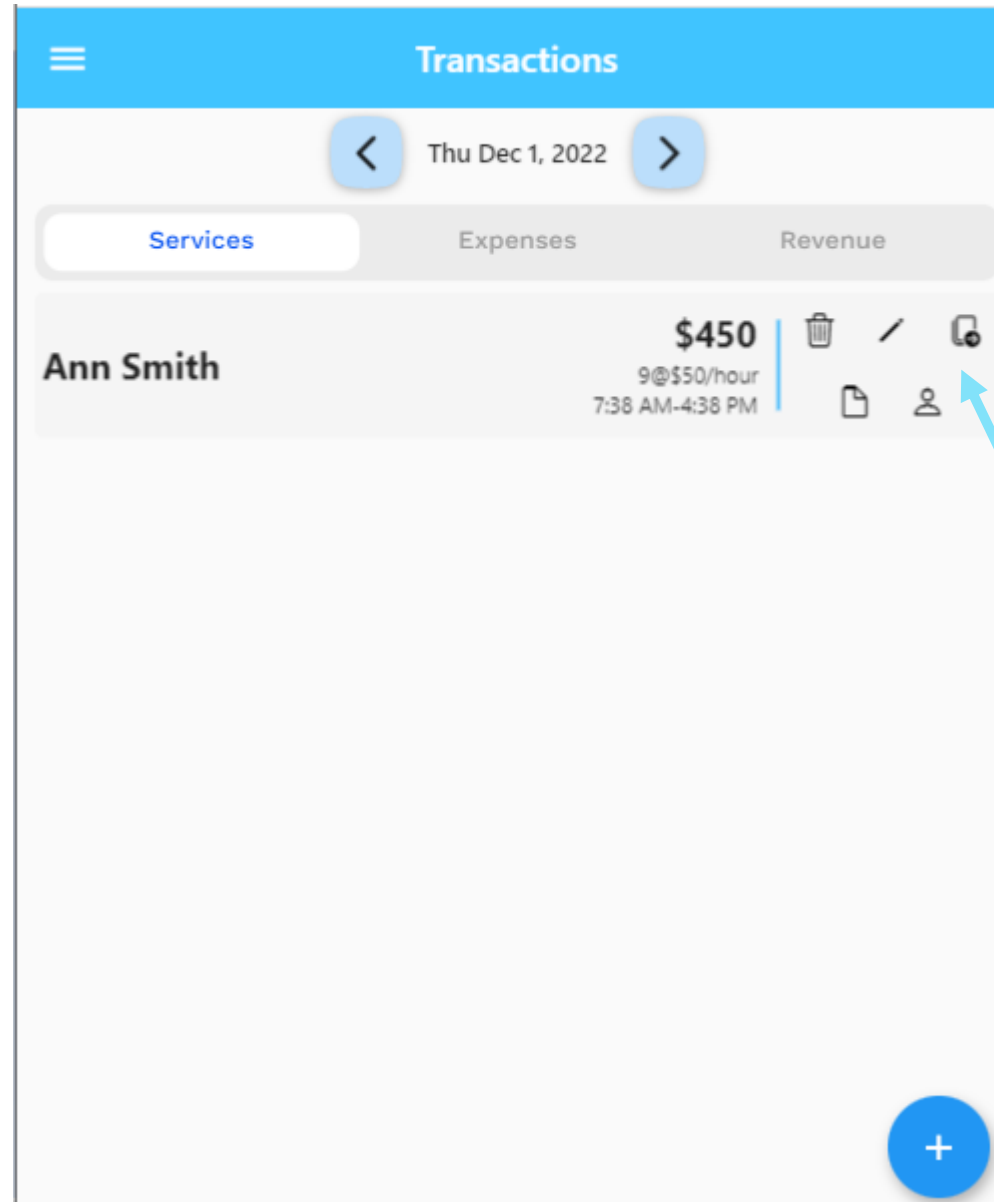
Transactions		
<div><div><</div><div>Thu Dec 1, 2022</div><div>></div></div>		
Services	Expenses	Revenue
Ann Smith	\$450 9@\$50/hour 7:38 AM-4:38 PM	

Patient name

Amount Charged
Charge details

One row displayed in a list for each transaction entered for that day.

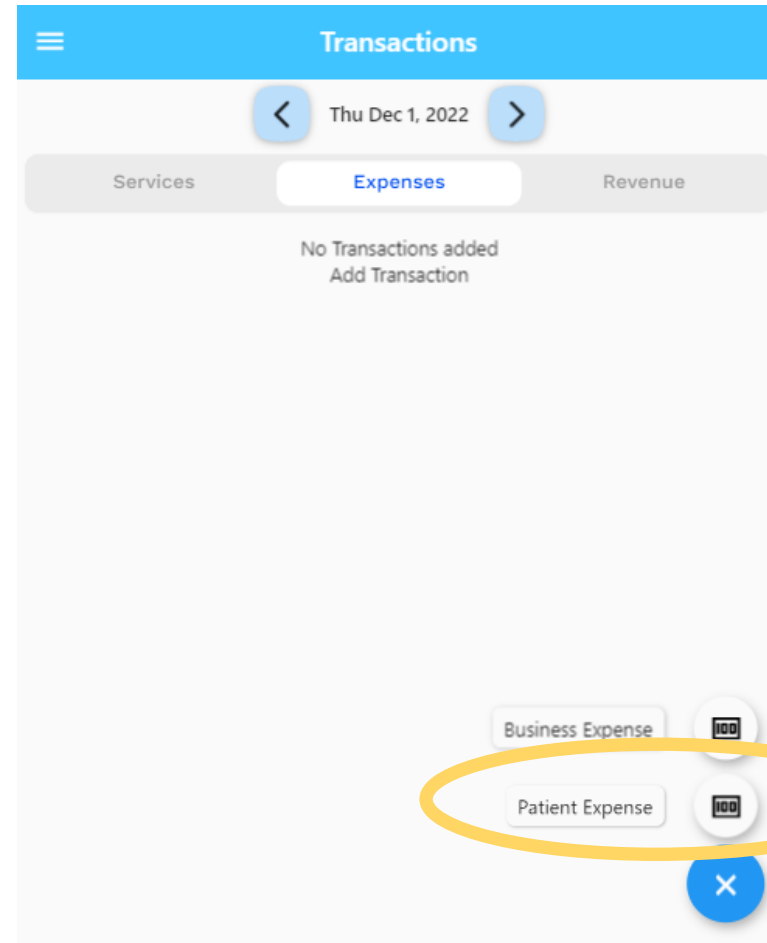
Icon Actions



Icon actions: Delete, Edit, Copy to next day, Note, Go to related patient information

Click on the *Copy to Next Day* icon. Then press the > arrow next to the date to advance to Dec 2. You should see Ann Smith on Dec 2.

Adding Patient Expenses



1. Make sure you are on Dec 1
2. Tap on the *Expenses* tab
3. Press the blue + button on bottom right
4. Tap *Patient Expense*

Add Supplies Patient Expense

Transactions

< Thu Dec 1, 2022 >

Add Patient Expense

Patient: [New](#)

Ann Smith

Expense Type

Supplies

Amount

24.33

Invoice Note

Bandages



















Cancel Save

1. Select patient
2. Select expense type
3. Enter \$ amount or # of expense type, ie, 50 miles
4. Enter note if applicable
5. Save

Reference Info: Patient Expense Types

Patient Expense Type	Input Type
Supplies	Enter amount
Mileage	.625/mile; enter # of miles and total is calculated
Flight	Enter amount
Rental Car	Enter amount
Taxi	Enter amount
Tolls	Enter amount
Public Transport	Enter amount

Viewing Patient Expense Entries

Transactions		
<div><div><</div><div>Thu Dec 1, 2022</div><div>></div></div>		
Services	Expenses	Revenue
Ann Smith Mileage	\$21.25 34@ \$0.625/Mile	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Ann Smith Supplies	\$24.33	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Ann Smith Tolls	\$3.50	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>

Action Icons:

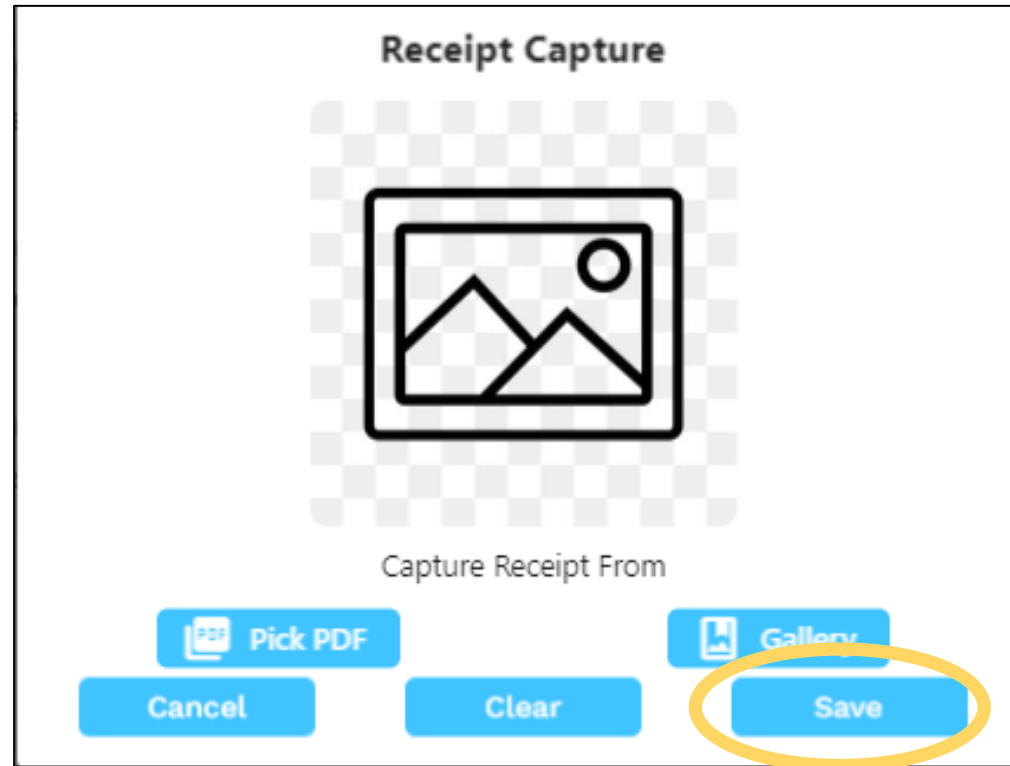
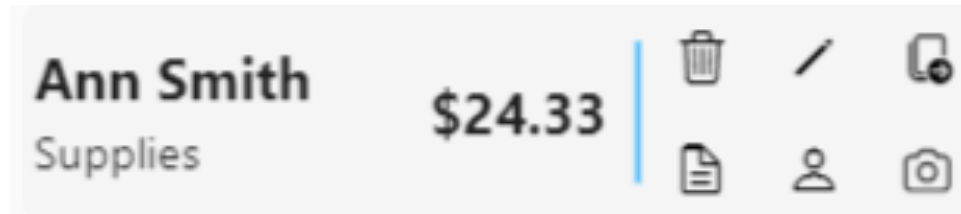
- Delete
- Edit expense
- Copy to Next Day
- Edit Note
- Go to Patient info
- Camera (receipts)

Easy copy of an
expense to next
day

Transactions		
<div><div><</div><div>Thu Dec 1, 2022</div><div>></div></div>		
Services	Expenses	Revenue
Ann Smith Mileage	\$21.25 34@ \$0.625/Mile	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Ann Smith Supplies	\$24.33	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Ann Smith Tolls	\$3.50	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>

Press the *Copy to Next Day* icon for each of the expenses. Review that they are all copied to the next day (Dec 2 in this example)

Adding invoice receipts



From any patient expense row on the transactions/Expenses screen you can

1. Select the camera icon
2. Go to a patient expense on Transactions screen
3. Click on camera icon
4. Click on *Gallery* or *Pick PDF* and select receipt for your expense
5. Press *Save*

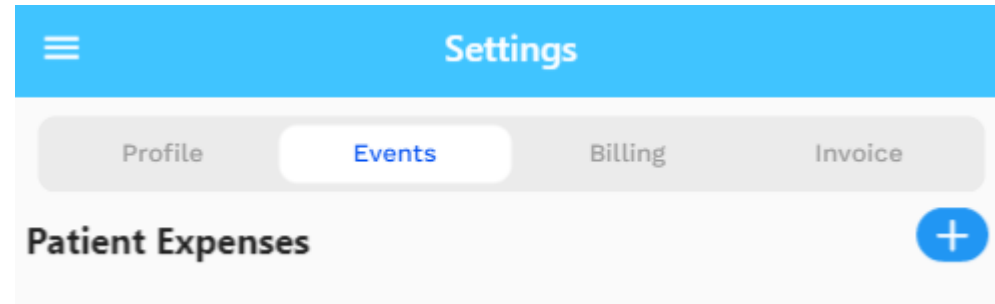
Now when you generate your invoice, the receipt will show up at the bottom of the invoice

CSNTrac

Adding service or expense types

SCENARIO: YOU
NEED TO CHANGE
A SERVICE OR
EXPENSE RATE OR
ADD A NEW
SERVICE OR
EXPENSE TYPE

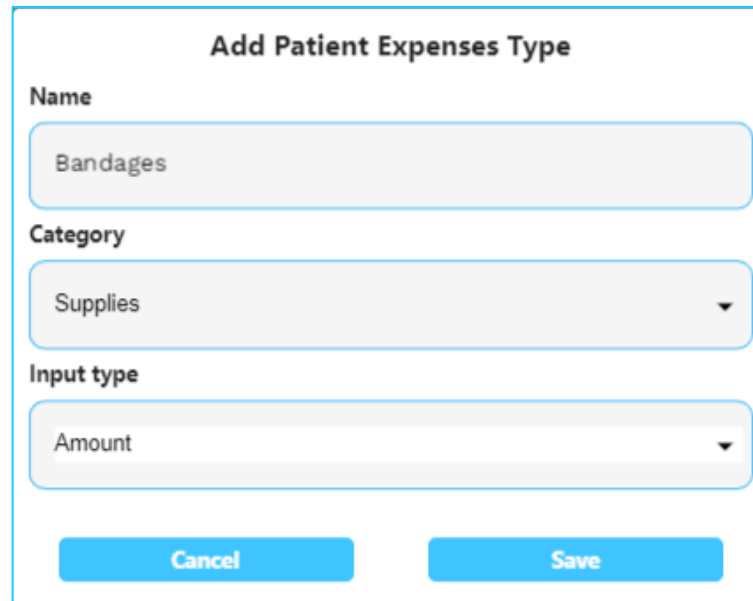
Creating an Event



The screenshot shows the 'Settings' screen with a blue header. Below the header is a tab bar with four options: 'Profile', 'Events' (which is selected and highlighted in white), 'Billing', and 'Invoice'. Under the 'Events' tab, there is a section titled 'Patient Expenses' with a blue circular button containing a white plus sign to its right.

Go to Settings screen, Events Tab

1. Press the blue + button on the right of the event category you wish to add an event. Categories are: *Services, Revenue, Patient Expenses, and Business Expenses*



The screenshot shows a dialog box titled 'Add Patient Expenses Type'. It contains three input fields: 'Name' with the text 'Bandages', 'Category' with a dropdown menu showing 'Supplies', and 'Input type' with a dropdown menu showing 'Amount'. At the bottom of the dialog are two buttons: 'Cancel' and 'Save'.

2. Enter information in the dialog. Input type is discussed on next slide.

3. Press *Save*

Creating an Event

Input types

Input types

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

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

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

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

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

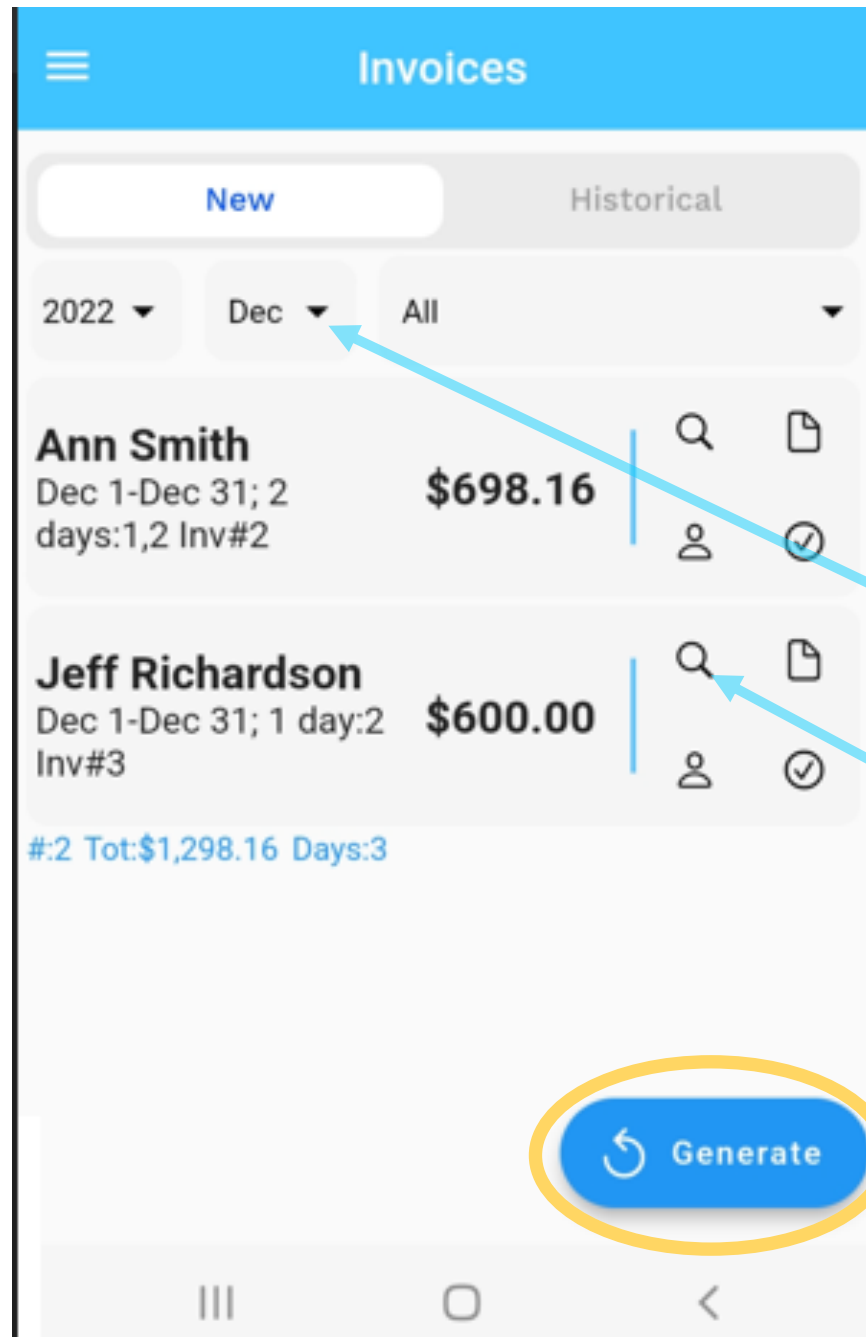
CSNTrac Tutorial

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THE SCENARIO: IT'S THE END OF THE WEEK AND WE NEED TO SEND INVOICES TO OUR PATIENTS

Videos are at: <http://rayoflightsoftware.com/videos.html>

Invoices Screen



1. Navigate to Invoices screen
2. Press *Generate* to create new invoices
3. Select month *Dec* in the filter
4. View invoice by pressing the magnifying glass icon.

View Invoice

←

Invoice



Mary Thompson, Christian Science Nurse
Remit to: Mary Thompson, 1435 Main St, Apt 2B, South Hampton NJ 28822

552-342-5999
mathenydale@gmail.com, rayofflightsoftware.com

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

Invoice No: 2
December 3, 2022

For Christian Science Nursing

Services

Service, 12 hours @ \$50.00/hour
Dec 1 2022, 9.0 hours 7:38 AM-4:38 PM
Dec 2 2022, 3.0 hours 3:00 PM-5:55 PM

\$600.00
\$450.00
\$150.00

Expenses

Supplies
Dec 1 2022, Bandages
Dec 2 2022

\$48.66
\$24.33
\$24.33

Travel Expenses

Tolls
Dec 1 2022
Dec 2 2022
Mileage, 68 Miles @ \$0.625/Mile
Dec 1 2022, 34.0 Miles
Dec 2 2022, 34.0 Miles

\$7.00
\$3.50
\$3.50
\$42.50
\$21.25
\$21.25

Total Travel Expenses

\$49.50

Total Invoice

\$698.16

Prior Balance Due

-\$120.00

Balance Due

\$578.16

"for he careth for you." (1 Peter 5:7)

System automatically creates an invoice for billing period with all patient services, expenses and travel included. Format approved by NFCSN

1. Email Ann's invoice to yourself by pressing the envelope icon. Or, on the web, press the *Close* icon on the *invoice* screen.

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

View Invoice

Mary Thompson, Christian Science Nurse
Remit to: Mary Thompson, 1435 Main St, Apt
2B, South Hampton NJ 28822

552-342-5999
mathenydale@gmail.com, rayofflightsoftware.com

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

Invoice No: 2
December 3, 2022

For Christian Science Nursing

Services

Service, 12 hours @ \$50.00/hour		\$600.00
Dec 1 2022, 9.0 hours 7:38 AM-4:38 PM	\$450.00	
Dec 2 2022, 3.0 hours 3:00 PM-5:55 PM	\$150.00	

Expenses

Supplies		\$48.66
Dec 1 2022, Bandages	\$24.33	
Dec 2 2022	\$24.33	

Travel Expenses

Tolls		\$7.00
Dec 1 2022	\$3.50	
Dec 2 2022	\$3.50	
Mileage, 68 Miles @ \$0.625/Mile		\$42.50
Dec 1 2022, 34.0 Miles	\$21.25	
Dec 2 2022, 34.0 Miles	\$21.25	

Total Travel Expenses		\$49.50
------------------------------	--	----------------

Total Invoice		\$698.16
----------------------	--	-----------------

Prior Balance Due		-\$120.00
--------------------------	--	------------------

Balance Due		\$578.16
--------------------	--	-----------------

"for he careth for you." (1 Peter 5:7)

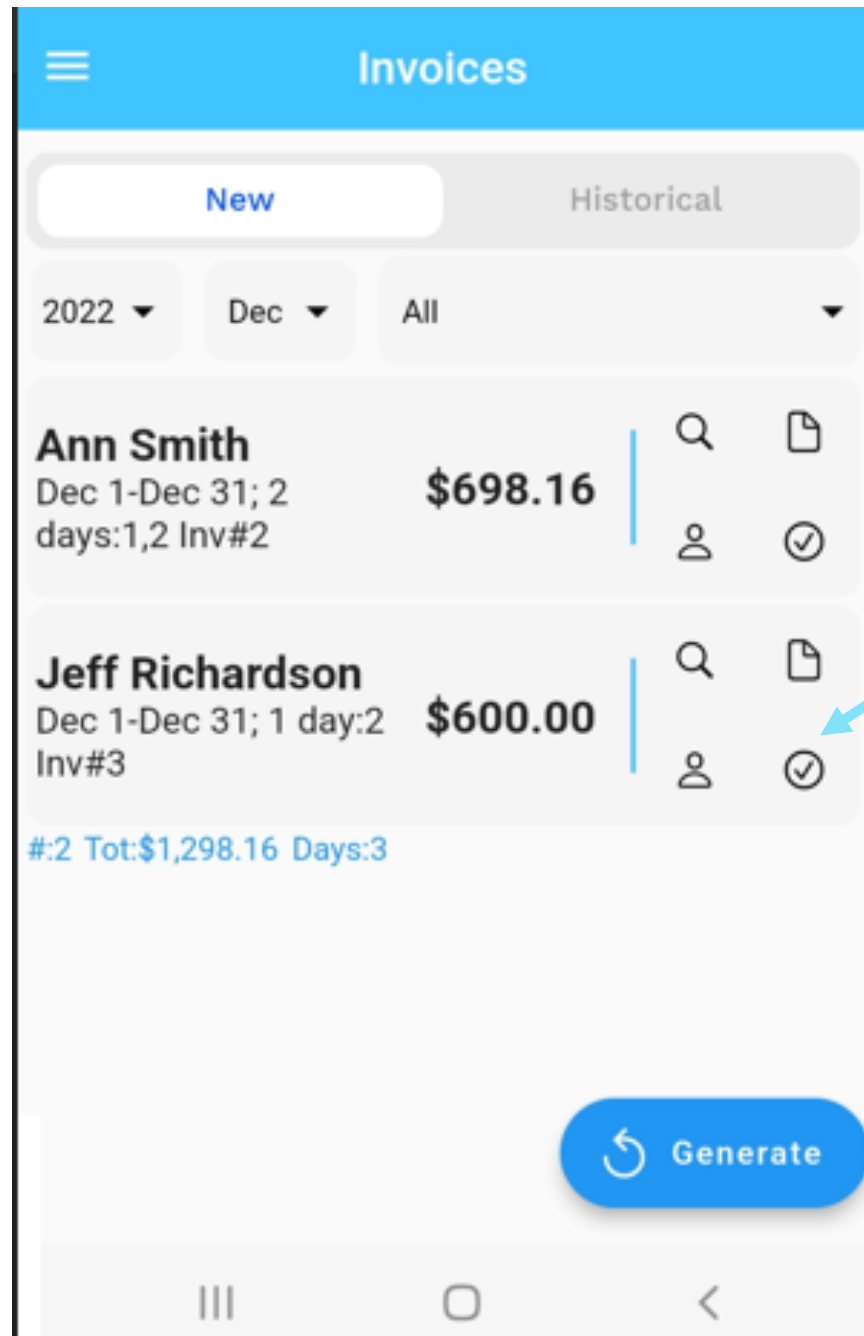
Services, Expenses,
Travel Expenses
categories

} Prior balance and
totals

Invoice Note

Invoices

Screen: Close invoice



Now, use the *Close* icon (check box within circle) to close Jeff Richardson's invoice.

You can view it first to review it but be sure it's closed and not on the *New* invoice tab when you're finished

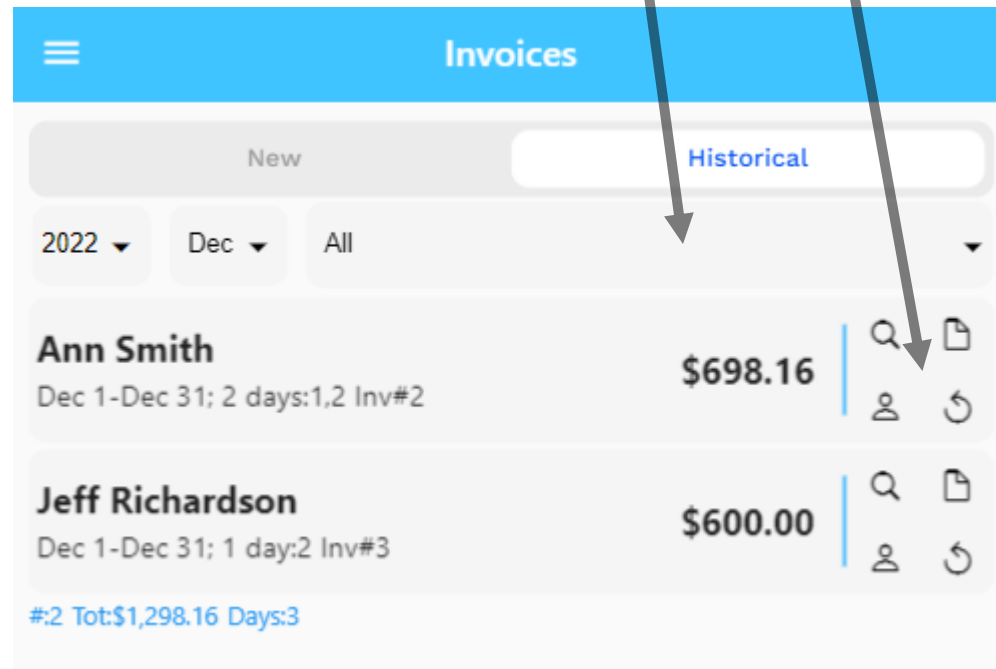
Historical Invoice

Press the *Historical* tab

- Historical invoices are the ones you have emailed or closed with the close icon. Filters are on historical to view past invoices by month or patient

Actions

- Tap on Historical filter by date or patient
- Icon actions: View invoice, Note, Patient information, Re-open invoice



CSNTrac

Advanced Invoicing

- changing invoice format
- changing billing frequency
- adding notes
- adding a benevolence amount

SCENARIO: YOU WANT TO ADD NOTES TO YOUR INVOICE AND REDUCE ONE 5%; YOU ALSO NEED TO ADD A RECEIPT FOR THE EXPENSES

Modifying invoice format

Settings

Profile Events Billing Invoice

Include attachments ☒

Include Prior Balance Due ☒

Letterhead format: Centered

Round time entry to (minutes), Minimum minutes for a single charge

15, 30

Invoice Message

"for he careth for you." (I Peter 5:7)

Email Message

If you have been approved for financial assistance, you should forv

Benevolence Message

Benevolence Message

Navigate to Settings Screen,
Invoice Tab

1. Set letterhead format to *Centered*
2. Set time entry rounding: 15 minutes with 30 minute minimum for a day
3. Set invoice message (shown on all invoices)
4. Set email message (shown on all invoice emails)
5. Press *Save*

Setting billing information

Settings

Profile Events **Billing**

Invoice Billing Period:

- None
- Weekly**
- Bi-weekly
- Monthly

Payment Source

Source #1
S.California

Source #2
Sunnyside

Payment Methods

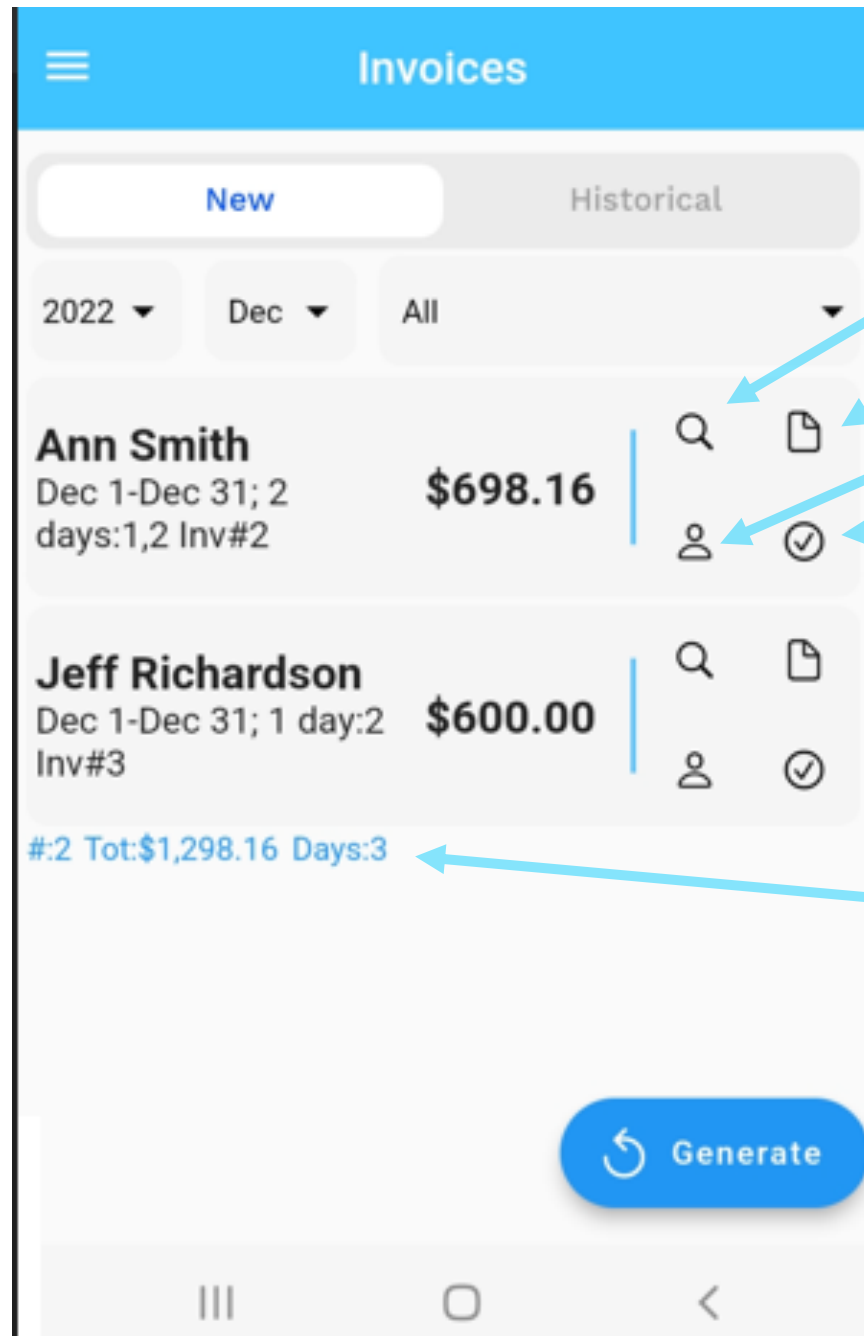
Payment Method	Fixed Fee	Variable Fee %
PayPal	0	0
Venmo	0	0

- Select billing period (Weekly, Bi-weekly, or Monthly)
- Enter or edit payment sources and methods. Fees may be added for sources such as PayPal.

On start up, user should select a billing period that works for their practice

Invoices

Screen: Icons on each invoice



Icon Actions

View invoice

Add Note or benevolence

Go to related patient information

Close Invoice

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

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

Ann Smith
Dec 1-Dec 31; 2 days:1,2 Inv#2

\$698.16

🔍 📄
👤 ✓

Edit Note

Private note

Invoice note

Note to appear for patient on this invoice only

Reduction % ☒

10

Invoice date

Dec 3, 2022

Cancel Save

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

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

CSNTrac Tutorial

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

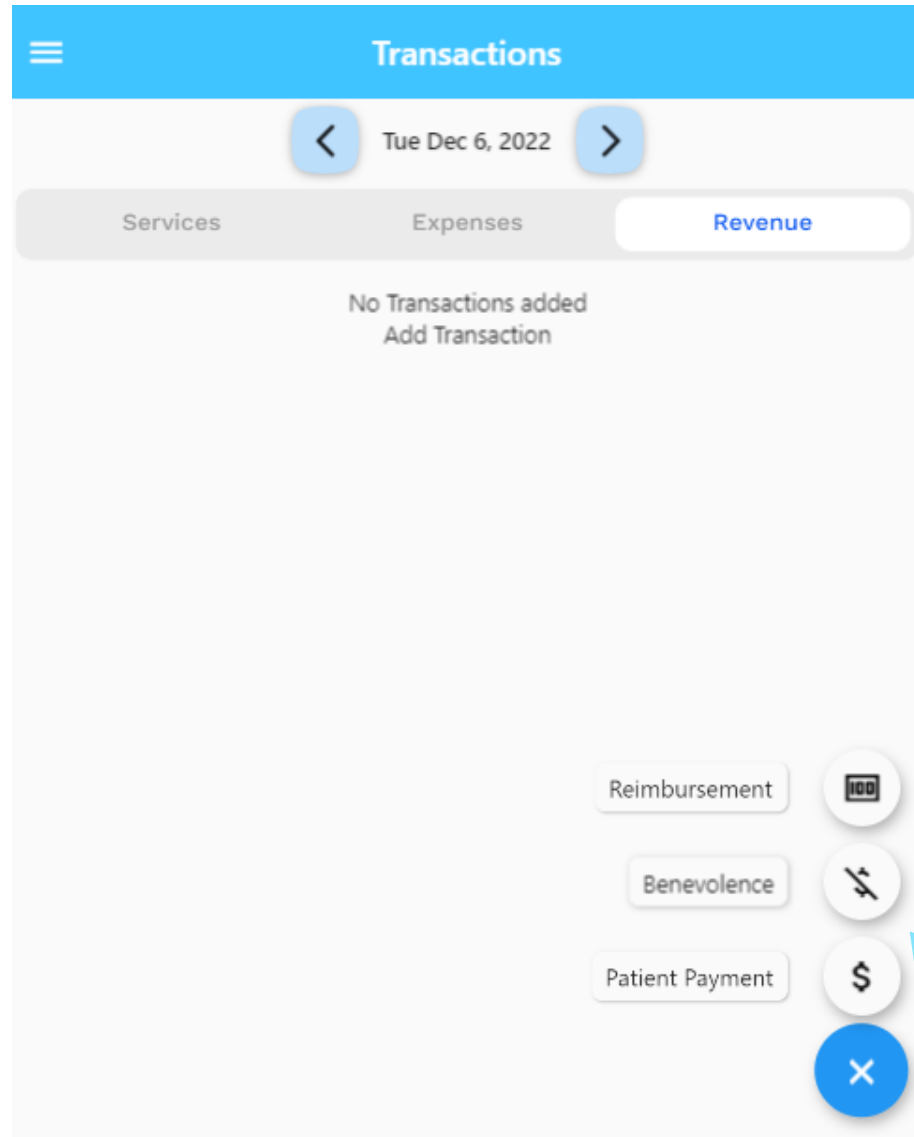
SCENARIO: YOU RECEIVE PAYMENTS FROM PATIENTS AND NFCSN

Videos are at: <http://rayoflightsoftware.com/videos.html>

CSNTrac

4. Payments and Patient Statement

Revenue Entry



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

Patient Payment Entry

The screenshot shows a mobile application form titled "Add Patient Payment". It contains several input fields and a "Save" button. Numbered arrows point to each field in sequence: 1. Points to the "Patient" dropdown menu. 2. Points to the "Amount" text input field. 3. Points to the "Payment Method" dropdown menu. 4. Points to the "Payment Source" dropdown menu. 5. Points to the "Invoice number" text input field. 6. Points to the "Save" button, which is highlighted with a yellow circle.

Add Patient Payment

Patient: [New](#)
Jeff Richardson

Amount
600

Payment Method
Check

Payment Source
Patient

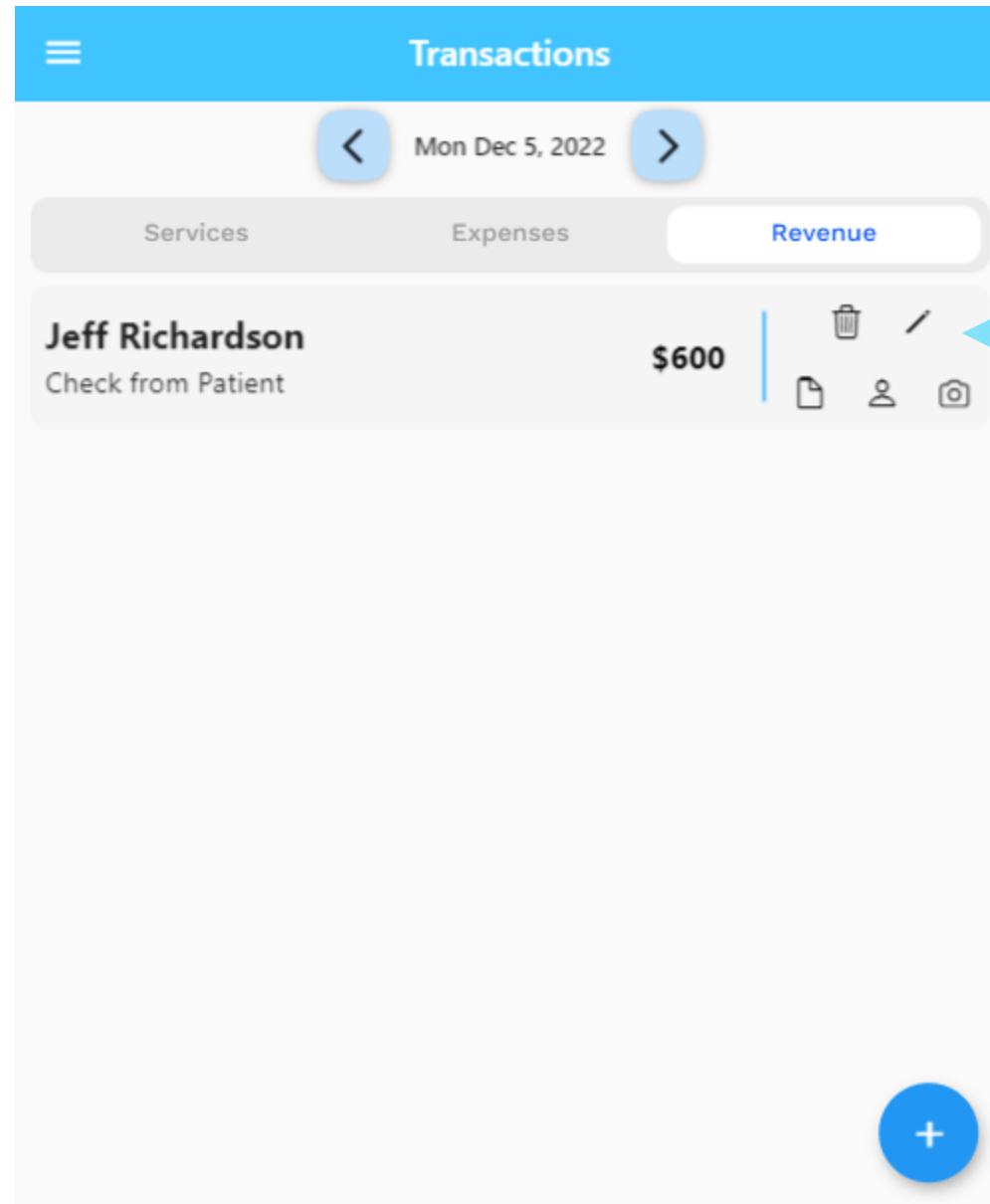
Invoice number
Invoice Number

Cancel Save

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

View Patient Payment Entry

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



Actions

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

NFCSN Payment Entry

Add Patient Payment

Patient: [New](#)

Ann Smith

Amount

500

Payment Method

Direct Deposit

Payment Source

NFCSN

Invoice number

2

Cancel Save

1. Select patient
2. Enter payment amount
3. Enter method *Direct Deposit*
4. Enter source: *NFCSN*
5. Enter invoice number 2 (or whatever was generated in your app for Ann Dec invoice)
6. Tap *Save*

NFCSN Payment Entry

Invoices

New Historical

2022 All All

Jeff Richardson Nov 1-Nov 30; 4 days:23,25,27,28 Inv#4	\$639.38 Paid: \$100.00	🔍 📄 👤 ↺
Ann Smith Dec 1-Dec 31; 2 days:1,2 Inv#2	\$698.16 Paid: \$620.00	🔍 📄 👤 ↺
Jeff Richardson Dec 1-Dec 31; 1 day:2 Inv#3	\$600.00 Paid: \$600.00	🔍 📄 👤 ↺

#:3 Tot:\$1,937.53 Days:7 Paid:\$1,320.00

↺ Generate

When a payment is made the systems allocates the payment to:

- Specified invoice # and then
- past invoices starting with the oldest unpaid invoice and working forward in time.

Historical invoices will show the amount paid as in the picture to the left.

When allocated patient expenses are paid first, then service revenue, then travel time.

CSNTrac

Patient Contacts and Information

SCENARIO: YOU
NEED TO
RECORD
INFORMATION
AND CONTACTS
FOR A PATIENT

Patient Information Screen

The screenshot displays the 'Patients' section of a mobile application. At the top, there is a dark blue header with a hamburger menu icon on the left and the title 'Patients' in the center. Below the header, a button labeled 'Select Another Patient' is visible. The main content area has two tabs: 'Dashboard' (active) and 'Statement'. A white modal dialog titled 'Select Patient' is overlaid on the screen. It contains three selectable patient entries: 'Ann Smith' with phone number '244-234-11344', 'Dale2', and 'Jeff Richardson' with phone number '623-523-5552'. A blue 'Cancel' button is at the bottom of the modal. In the background, partially obscured by the modal, are fields for 'Default Service Type' and 'Service', and a blue 'Save' button at the bottom of the screen.

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

Patient Information

Patients

Select Another Patient

Dashboard Statement

Authorized Contacts

Jeff Richardson, Patient
1 Main St., Northchester, New York 15511
Email jsoutherland@gmail.com
Cell 623-523-5552

Patient Information: Jeff Richardson

Default Service Type

Service

Save

Add authorized contact (see next slide)

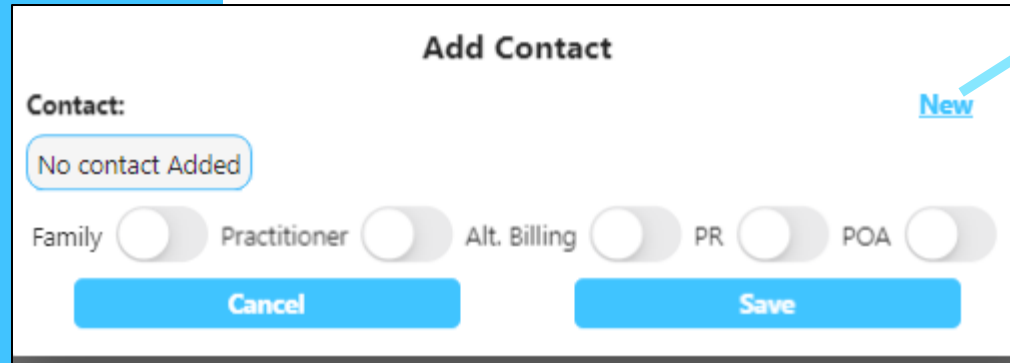
Patient information displayed

Type in information needed about patient

Optionally select default service type

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

Add Patient Contact



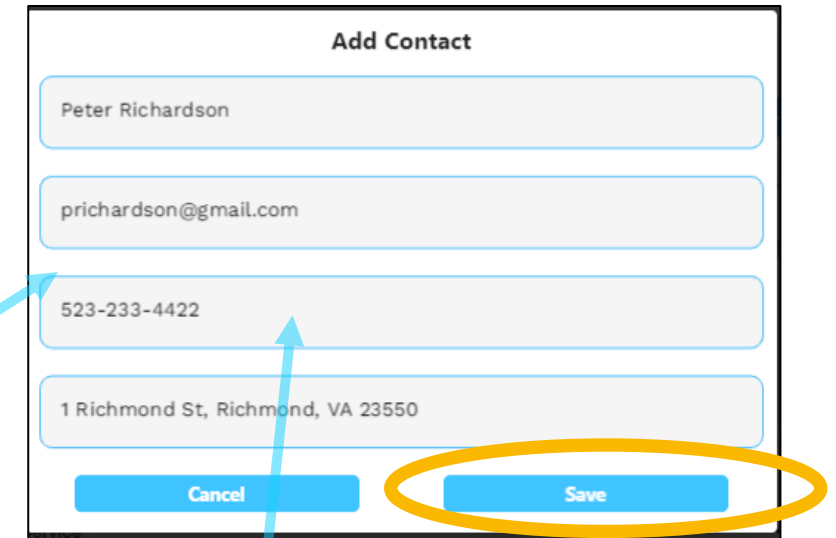
Add Contact

Contact:
No contact Added

Family ☐ Practitioner ☐ Alt. Billing ☐ PR ☐ POA ☐

Cancel **Save**

A blue arrow points from the 'New' link in the top right of this screen to the 'Add Contact' screen on the right.



Add Contact

Peter Richardson

prichardson@gmail.com

523-233-4422

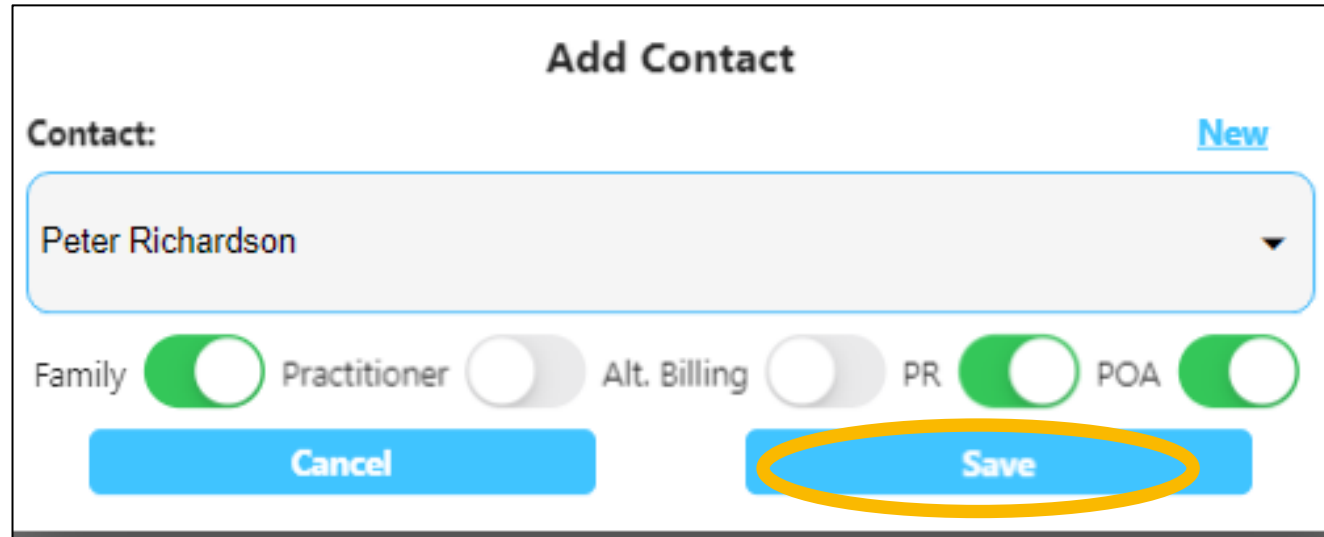
1 Richmond St, Richmond, VA 23550

Cancel **Save**

The 'Save' button is circled in yellow. A blue arrow points from the 'Save' button back to the 'Add Contact' screen on the left.

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

Add Patient Contact



The image shows a software dialog box titled "Add Contact". At the top right is a blue link labeled "New". Below the title is a label "Contact:" followed by a selection box containing the text "Peter Richardson" and a downward arrow. Underneath the selection box are five toggle switches: "Family" (green, turned on), "Practitioner" (grey, turned off), "Alt. Billing" (grey, turned off), "PR" (green, turned on), and "POA" (green, turned on). At the bottom are two blue buttons: "Cancel" on the left and "Save" on the right. The "Save" button is circled with a yellow oval.

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

Patient with
new contact
added

The screenshot shows a mobile application interface for managing patients. At the top, there is a blue header with a menu icon and the title "Patients". Below the header, there is a button labeled "Select Another Patient". A tab bar below the button shows "Dashboard" (active) and "Statement". The main content area is divided into sections. The "Authorized Contacts" section is circled in blue and contains two entries: "Peter Richardson, PR, POA, Family" and "Jeff Richardson, Patient". Each entry displays contact information (address, email, cell phone) and has edit and delete icons. Below the contacts, there is a section for "Patient Information: Jeff Richardson" with a text input field. At the bottom, there is a "Default Service Type" section with a dropdown menu currently showing "Service".

Patients

Select Another Patient

Dashboard Statement

Authorized Contacts

Peter Richardson, PR, POA, Family
1 Richmond St, Richmond, VA 23550
Email prichardson@gmail.com
Cell 523-233-4422

Jeff Richardson, Patient
1 Main St., Northchester, New York 15511
Email jsoutherland@gmail.com
Cell 623-523-5552

Patient Information: Jeff Richardson

Default Service Type

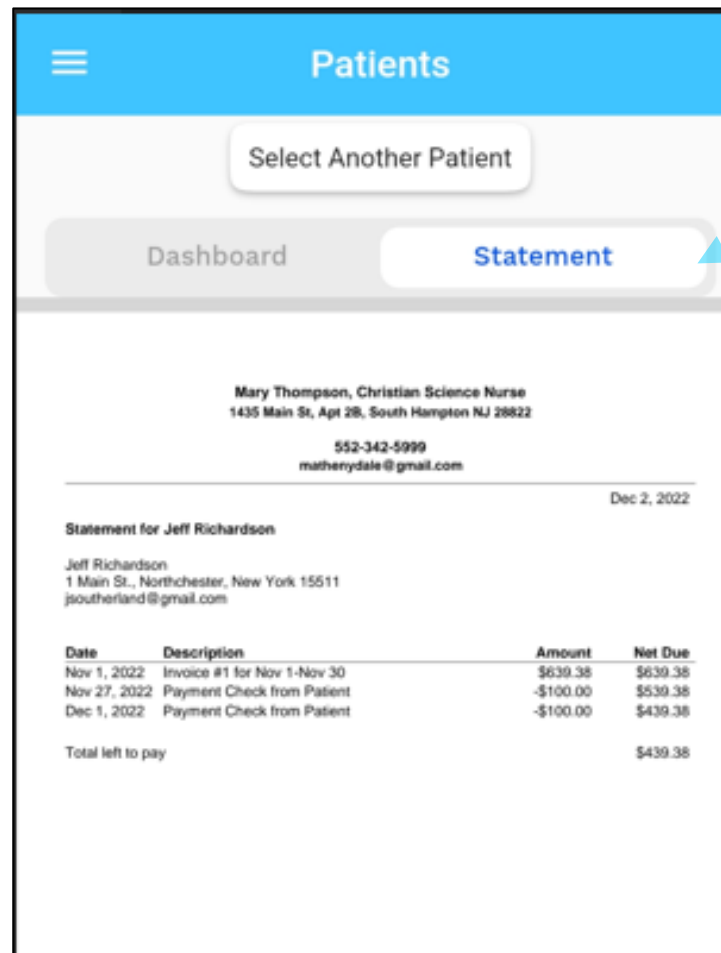
Service

CSNTrac

Patient Statement

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

Patient Statement



The screenshot shows a mobile app interface for 'Patients'. At the top is a blue header with a menu icon and the title 'Patients'. Below the header is a white bar with a button 'Select Another Patient'. Underneath is a navigation bar with two tabs: 'Dashboard' and 'Statement', with 'Statement' being the active tab. The main content area displays patient information for Mary Thompson, Christian Science Nurse, followed by a statement for Jeff Richardson dated Dec 2, 2022. The statement includes a table of transactions and a total amount due.

Date	Description	Amount	Net Due
Nov 1, 2022	Invoice #1 for Nov 1-Nov 30	\$639.38	\$639.38
Nov 27, 2022	Payment Check from Patient	-\$100.00	\$539.38
Dec 1, 2022	Payment Check from Patient	-\$100.00	\$439.38
Total left to pay			\$439.38

1. Tap on *Statement* tab at top. Statement should appear on mobile app or download for Web version. Open statement PDF file for Jeff.

Excellent tool to see all patient invoice and payment activity in one report.

Shows all Invoices and Payments related to patient over time
Includes any current amount due.
Report may be emailed to user or patient

Date	Description	Amount	Net Due
Nov 27, 2022	Payment Check from Patient	-\$100.00	-\$100.00
Nov 28, 2022	Invoice #1 for Nov 1-Nov 30	\$639.38	\$539.38
Dec 1, 2022	Payment Check from Patient	-\$100.00	\$439.38
Total left to pay			\$439.38

CSNTrac Tutorial

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

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

Videos are at: <http://rayoflightsoftware.com/videos.html>

CSNTrac

Business Expenses and Reimbursements

SCENARIO: YOU HAVE UTILITY AND *JOURNAL* EXPENSES AS WELL AS REIMBURSEMENTS FOR TRAVEL TO A CONFERENCE.

LET'S RECORD THOSE TRANSACTIONS SO OUR FINANCIAL STATE CAN BE ACCURATELY RECORDED

Financial Management

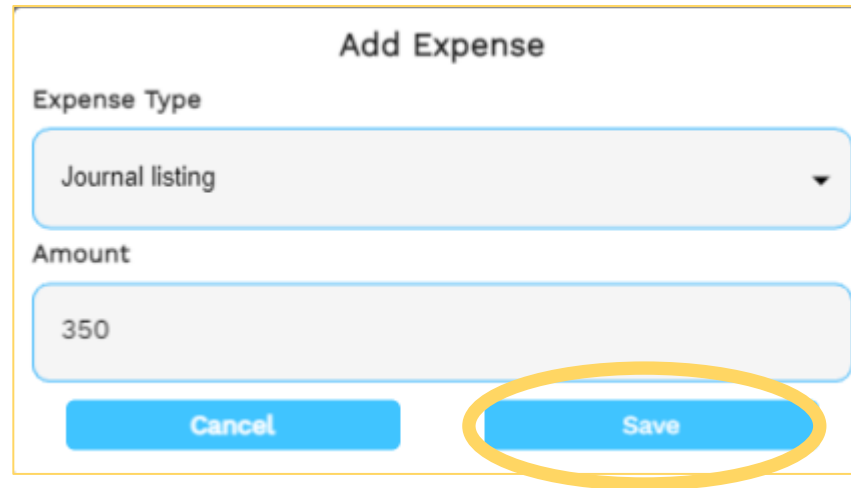


Financial Management involves recording all of your business expenses and then running a financial report at both monthly and year-to-date timeframes looking for:

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

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

Business Expense Entry

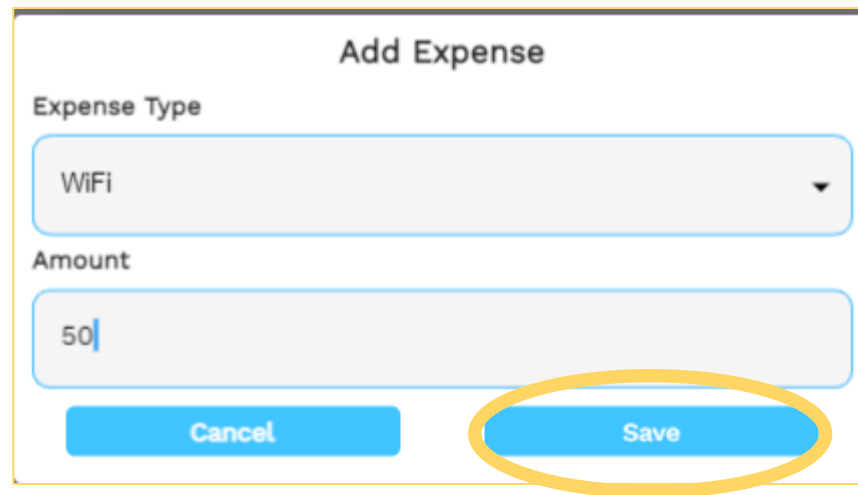


Add Expense

Expense Type
Journal listing ▼

Amount
350

Cancel Save



Add Expense

Expense Type
WiFi ▼

Amount
50

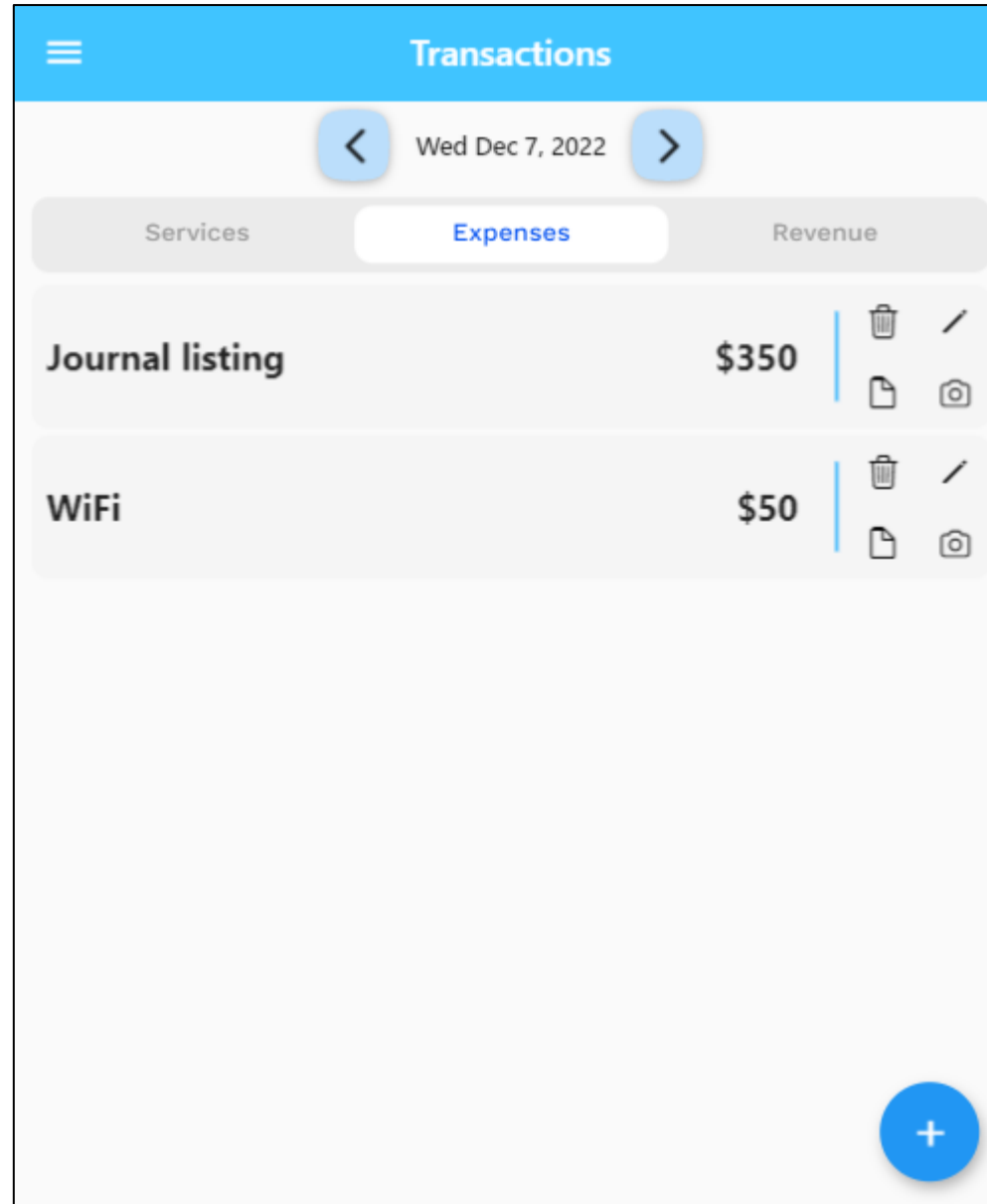
Cancel Save









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

Reference: Business Expense Types

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

Business Expense Entry



Transactions		
Wed Dec 7, 2022		
Services	Expenses	Revenue
Journal listing	\$350	   
WiFi	\$50	   

Final appearance
after entry of
two business
expenses

Reimbursements Entry

The screenshot shows a mobile application interface for adding a reimbursement. The form is titled "Add Reimbursement" and contains four input fields, each with a label above it: "Type", "Amount", "Payment Method", and "Payment Source". The "Type" field is a dropdown menu with "Travel reimbursement" selected. The "Amount" field is a text input with "412.50" entered. The "Payment Method" field is a dropdown menu with "Direct Deposit" selected. The "Payment Source" field is a dropdown menu with "NFCSN" selected. At the bottom of the form are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a yellow oval. Six numbered steps with arrows point to specific elements: 1. points to the top right corner of the screen, 2. points to the "+" icon in the top right corner, 3. points to the "Type" dropdown menu, 4. points to the "Amount" text input, 5. points to the "Payment Method" dropdown menu, and 6. points to the "Payment Source" dropdown menu.

Add Reimbursement

Type
Travel reimbursement

Amount
412.50

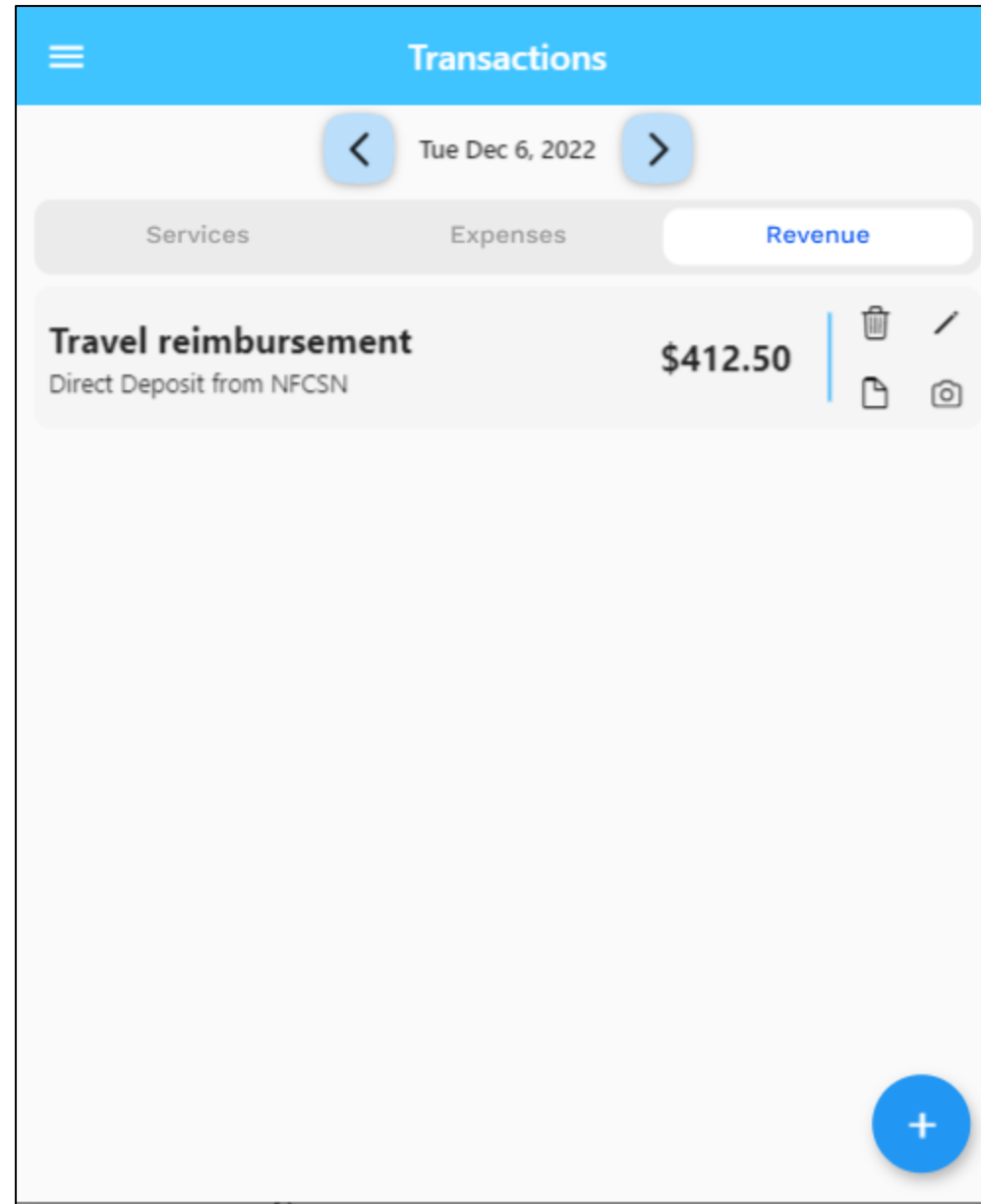
Payment Method
Direct Deposit

Payment Source
NFCSN

Cancel Save

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

View reimbursement



Final appearance
after entry of
reimbursement

Reimbursement Types (revenue)

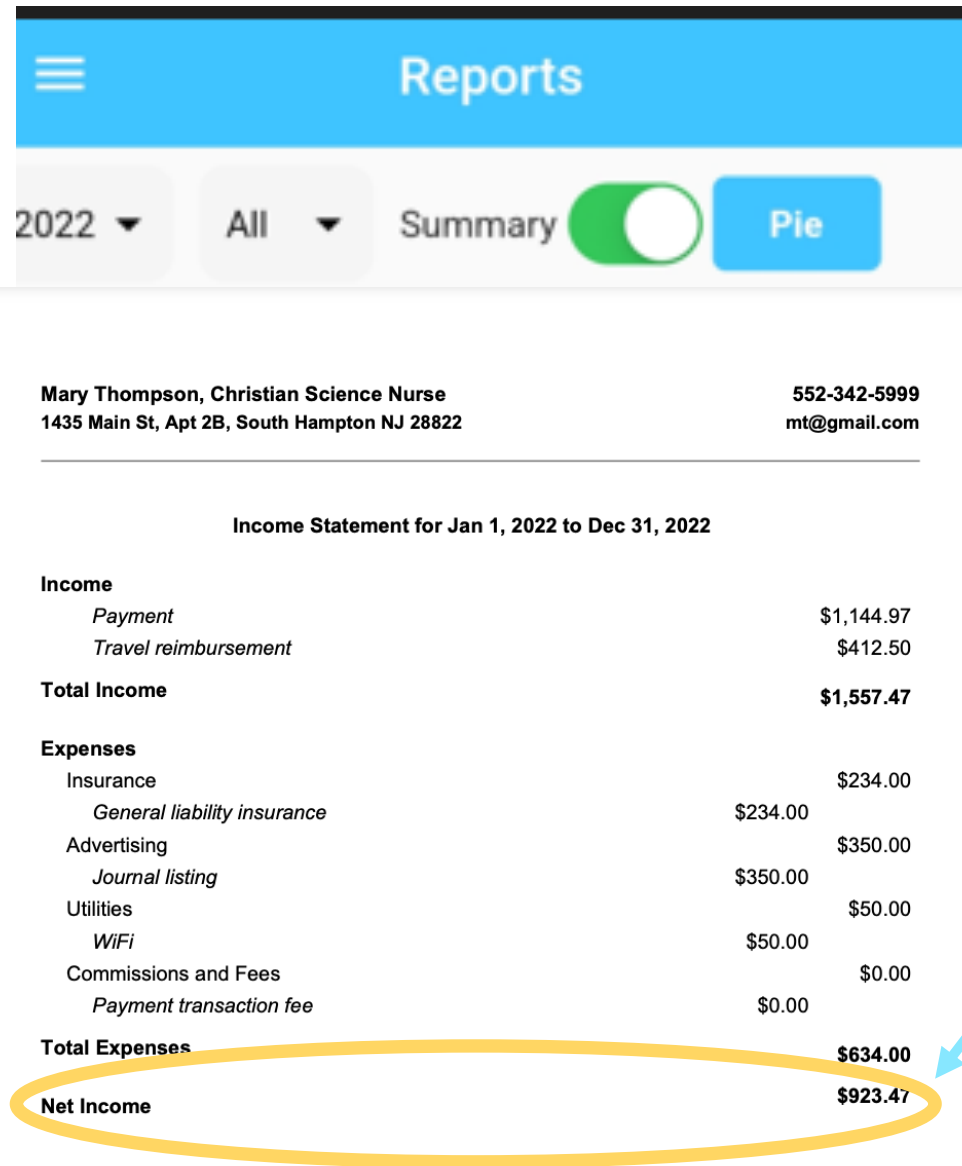
Revenue Type	Input type
Travel Reimbursement	Enter amount
Matching retirement contribution	Enter amount
Training grants	Enter amount
Supplies reimbursement	Enter amount

CSNTrac

Financial Report

SCENARIO: YOU WISH TO SEE YOUR YEAR-TO-DATE INCOME AND EXPENSES TO GET YOUR NET INCOME (PROFITABILITY) SO FAR IN THE YEAR

Reports Screen



- All income is from payments and reimbursements.
- Business expenses are grouped by Tax Categories for Schedule C form.
- Net Income = income - expenses

Detailed Financial Report

☰

Reports

2022 ▾

All ▾

Summary ☐

Pie

Mary Thompson, Christian Science Nurse

1435 Main St, Apt 2B, South Hampton NJ 28822

552-342-5999

mt@gmail.com

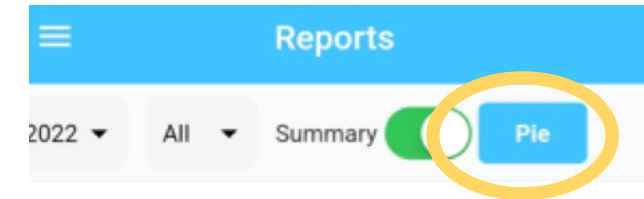
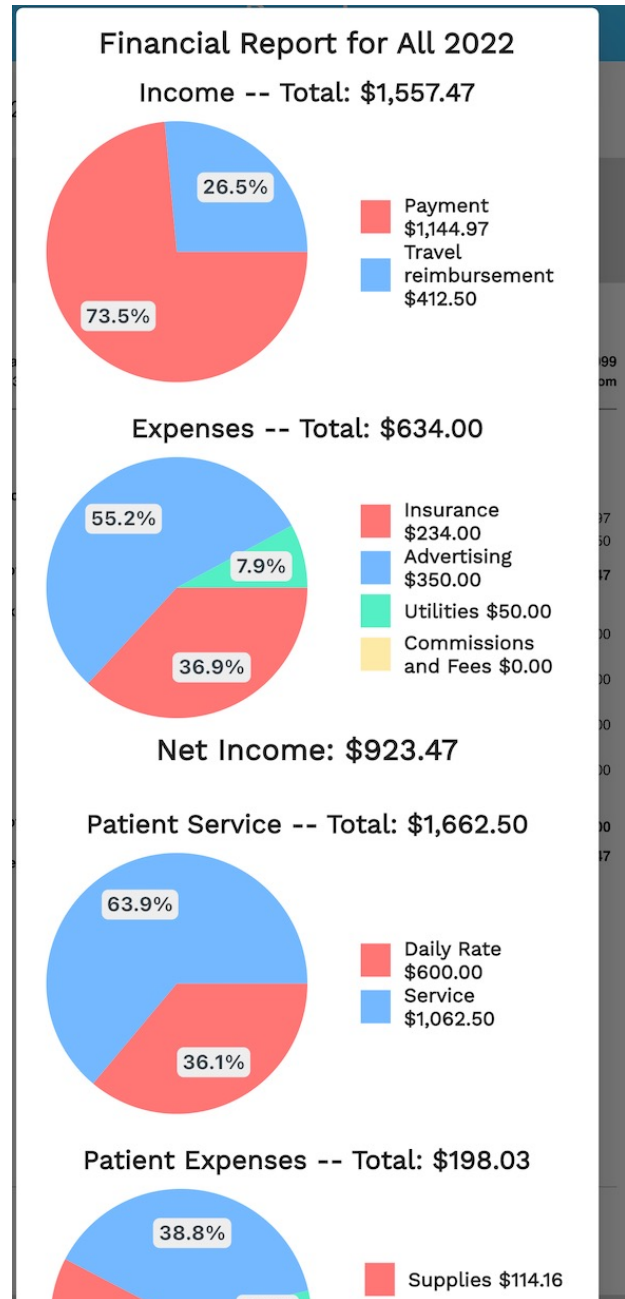
Income Statement for Jan 1, 2022 to Dec 31, 2022

Income		
Payment		\$1,144.97
Nov 27, 2022 JR Patient Check \$100.00 E/S/T:\$77 \$23 \$0	\$23.13	
Dec 2, 2022 AS Patient Check \$120.00 E/S/T:\$0 \$120 \$0	\$120.00	
Dec 7, 2022 JR Patient Check \$600.00 E/S/T:\$0 \$600 \$0	\$600.00	
Dec 7, 2022 AS NFCSN Direct Deposit \$500.00 E/S/T:\$98 \$402 \$0	\$401.84	
Travel reimbursement		\$412.50
Dec 6, 2022 NFCSN Direct Deposit	\$412.50	
Total Income		\$1,557.47
Expenses		
Insurance		\$234.00
General liability insurance	\$234.00	
Nov 27, 2022	\$234.00	
Advertising		\$350.00
Journal listing	\$350.00	
Dec 7, 2022	\$350.00	
Utilities		\$50.00
WiFi	\$50.00	
Dec 7, 2022	\$50.00	
Commissions and Fees		\$0.00
Payment transaction fee	\$0.00	
Total Expenses		\$634.00
Net Income		\$923.47

- Use the yearly and monthly filters to set a timeframe for the report. Month of *All* gives year-to-date totals.
- Tap *Summary* slider OFF to get detailed report.
- Detailed report shows revenue breakdowns by payment type: E/S/T/G which are Patient Expenses, Services, Travel time, Gift).

Pie Chart Financial Report

12/7/2022



Pie chart available to show % \$ by category of:

- Business revenue
- Business expenses
- Patient services
- Patient expenses