How to Find Required Data for the Practice Owners Economic Survey Using Avimark

Active and New Clients

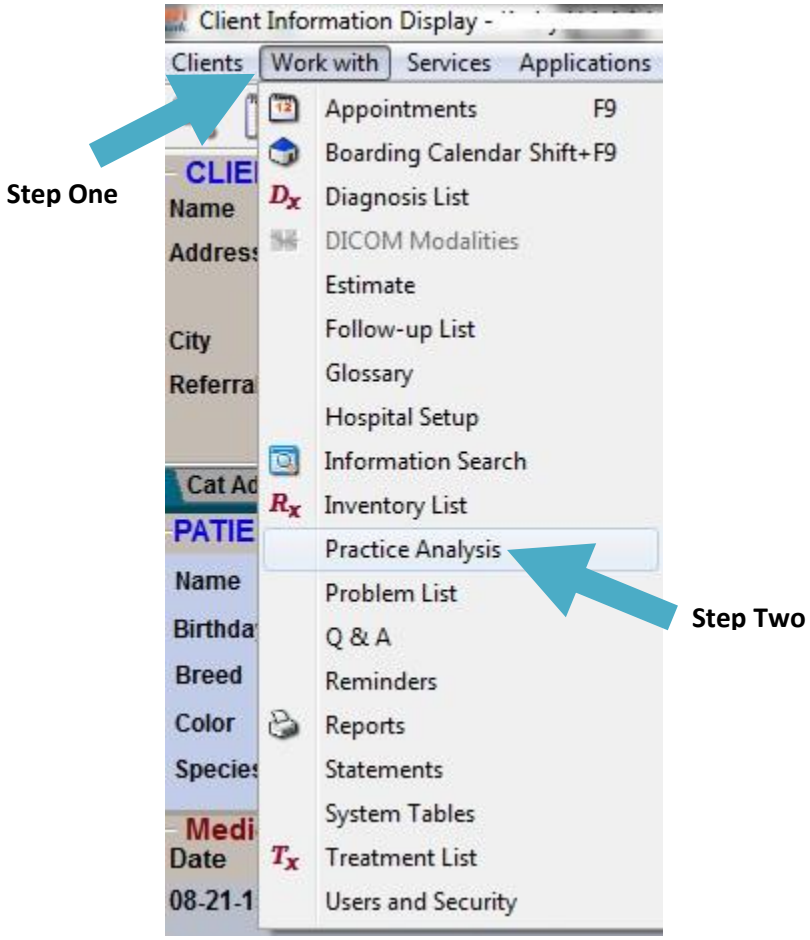
This section will walk you through how to find statistics on active and new clients in Avimark.

1. Select “Work with” from the toolbar
2. Pick “Practice Analysis” option
3. Click on “Reports” tab
4. Select “Client retention”
5. Set “Period” to Fiscal year (End date should be today’s date, start date should be one year ago)
6. Set “Invoices after” to just over one year ago (from today’s date; this will define active clients as one who has been seen within the past year. If Avimark gives an error message, set the date a few days further back)
7. Set “Years to compare” to one
8. Click “Run” to generate the report (can select "Preview" to pull up report on computer or can set "Print to" as Excel to create a spreadsheet of data)

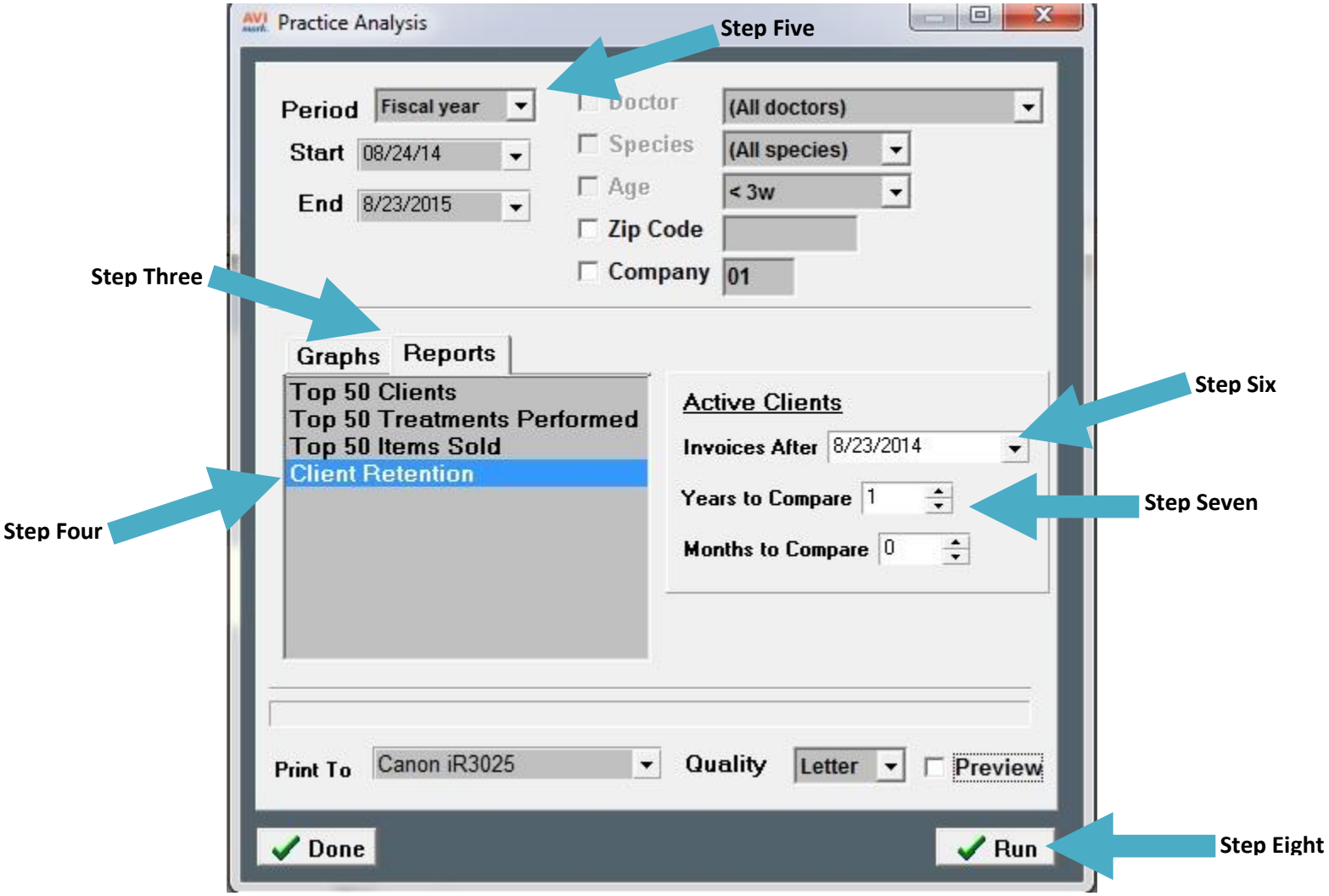
Report “Active clients at the end of the time frame” as Active clients within the Practice Owners Economic Survey

Report “New clients” as New clients within the Practice Owners Economic Survey

Active and New Clients – Steps One and Two



Active and New Clients – Steps Three through Eight



Active and New Clients – Figures to Record

Date of Report: 23/08/2015 **Loving Care Animal Hospital** **Page:** 1

CLIENT RETENTION STATISTICS

Start Date: 24/08/2014
End Date: 23/08/2015

	2015
Active clients at beginning of time frame	
Active clients at end of time frame	1,845
New Clients	208
Active and New Clients	
Clients Lost	
% Clients Lost	
% Clients Retained	

Record these

Invoices and Gross Revenue

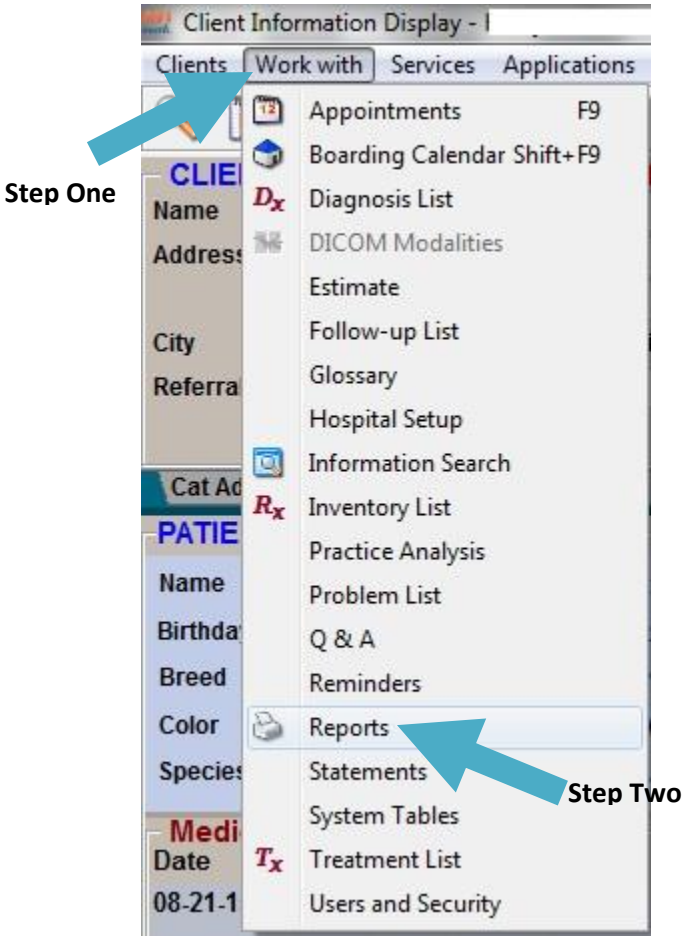
This section will walk you through how to find statistics on number of invoices and gross revenue in Avimark.

1. Select “Work with” from the toolbar
2. Pick “Reports” option
3. Set “Period” to Fiscal year (End date should be today’s date, start date should be one year ago)
4. Move “Period Totals” option into the “Print These” column
5. Move all other options into the “Don’t Print These” column
6. Click “Print” to generate the report (can select "Preview" to pull up report on computer or can set "Print to" as Excel to create a spreadsheet of data)

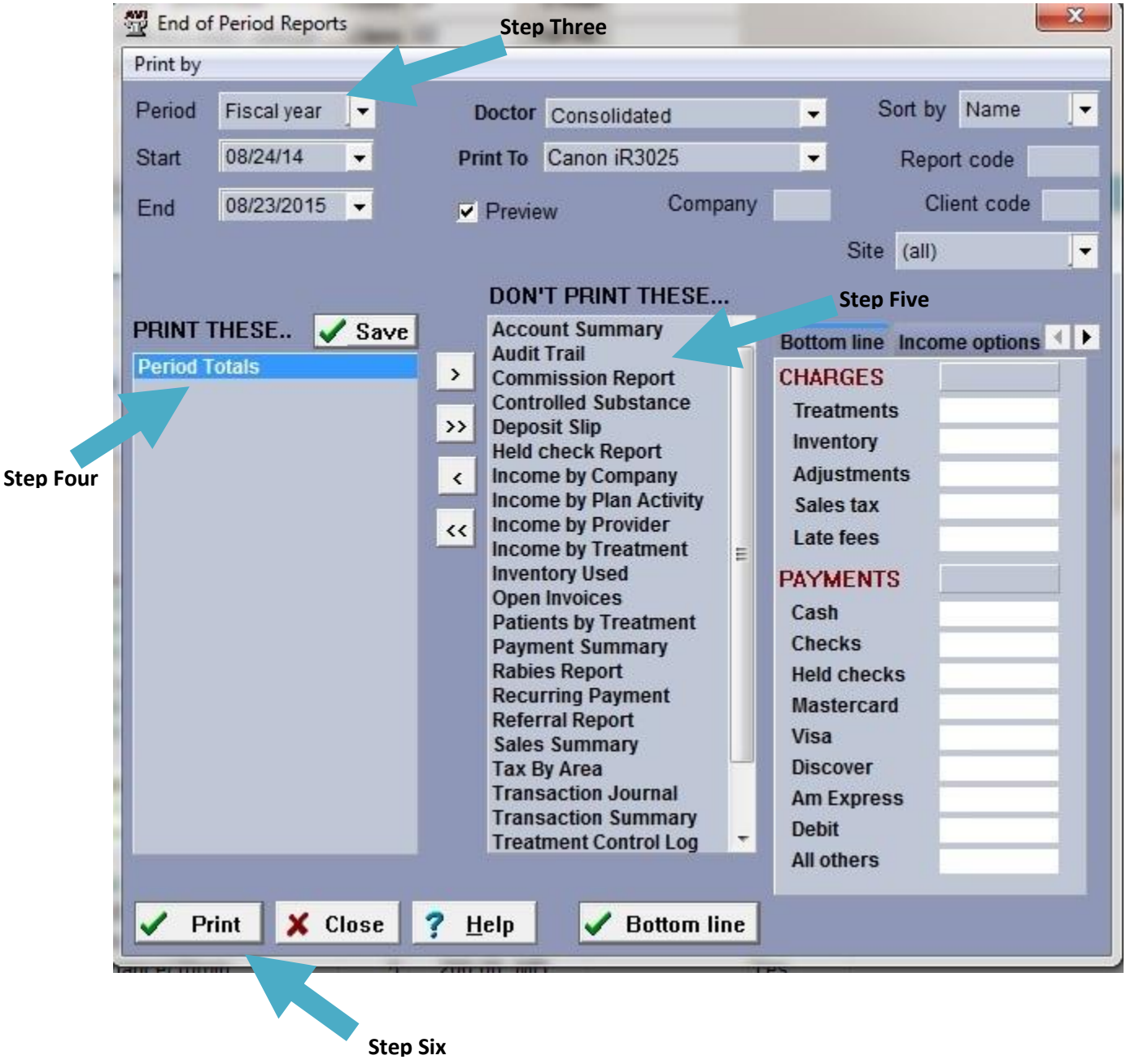
Report “Total Invoices Count” as Invoices within the Practice Owners Economic Survey

Report “Total Invoices Total” as Total veterinary revenue within the Practice Owners Economic Survey

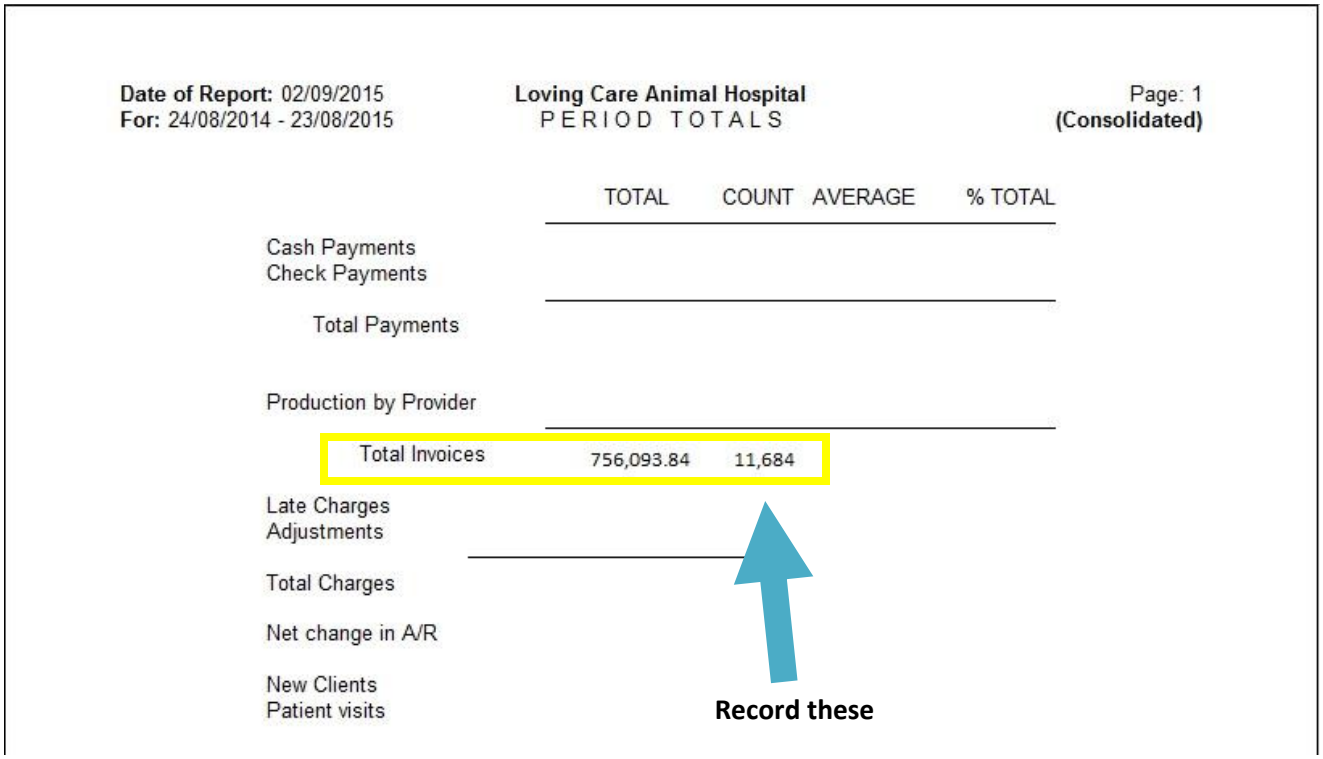
Invoices and Gross Revenue – Steps One and Two



Invoices and Gross Revenue – Steps Three through Six



Invoices and Gross Revenue – Figures to Record



Date of Report: 02/09/2015
For: 24/08/2014 - 23/08/2015

Loving Care Animal Hospital
PERIOD TOTALS

Page: 1
(Consolidated)

	TOTAL	COUNT	AVERAGE	% TOTAL
Cash Payments				
Check Payments				
Total Payments				
Production by Provider				
Total Invoices	756,093.84	11,684		
Late Charges				
Adjustments				
Total Charges				
Net change in A/R				
New Clients				
Patient visits				

Record these

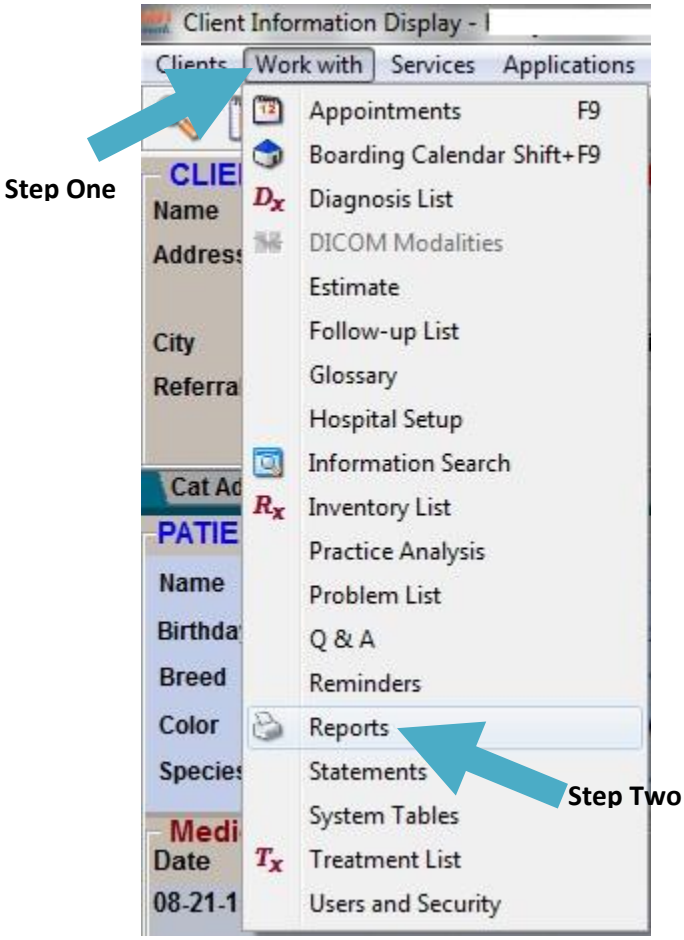
Sources of Revenue

This section will walk you through how to find the sources of gross revenue in Avimark.

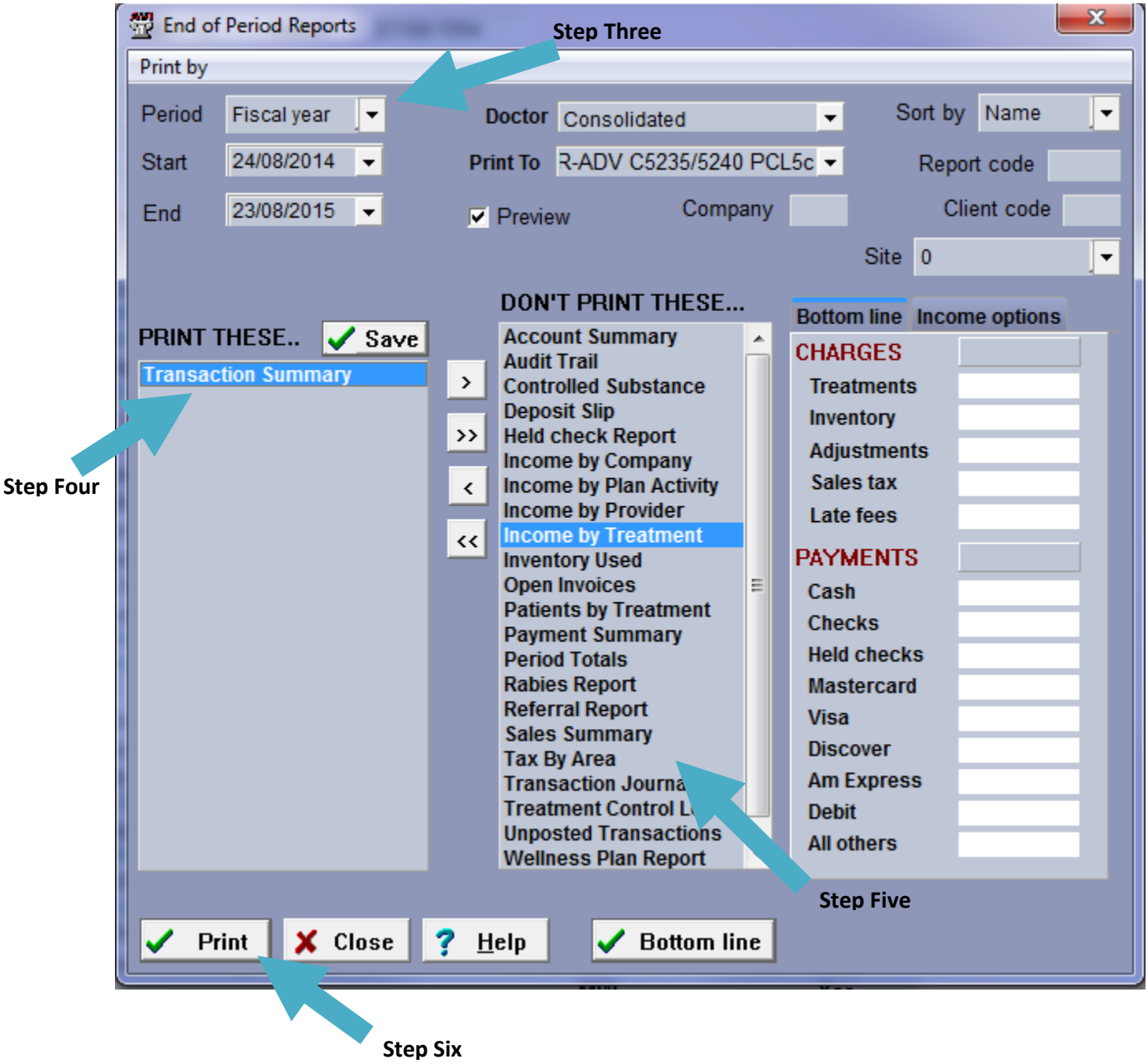
1. Select “Work with” from the toolbar
2. Pick “Reports” option
3. Set “Period” to Fiscal year (End date should be today’s date, start date should be one year ago)
4. Move “Transaction Summary” option into the “Print These” column (can also use “Income by Treatment” option for a more detailed report)
5. Move all other options into the “Don’t Print These” column
6. Click “Print” to generate the report (can select "Preview" to pull up report on computer or can set "Print to" as Excel to create a spreadsheet of data)

Revenue will be presented in a variety of categories, as outlined in your set up of Avimark. Group each category into one of the following: professional services, food sales, drug/medication sales, or other revenue (e.g. grooming, boarding). Add the income reported from all categories within a given source, and record within the Practice Owners Economic Survey (e.g. add up income from examinations, surgeries, dentistry, etc. and record as revenue from professional services).

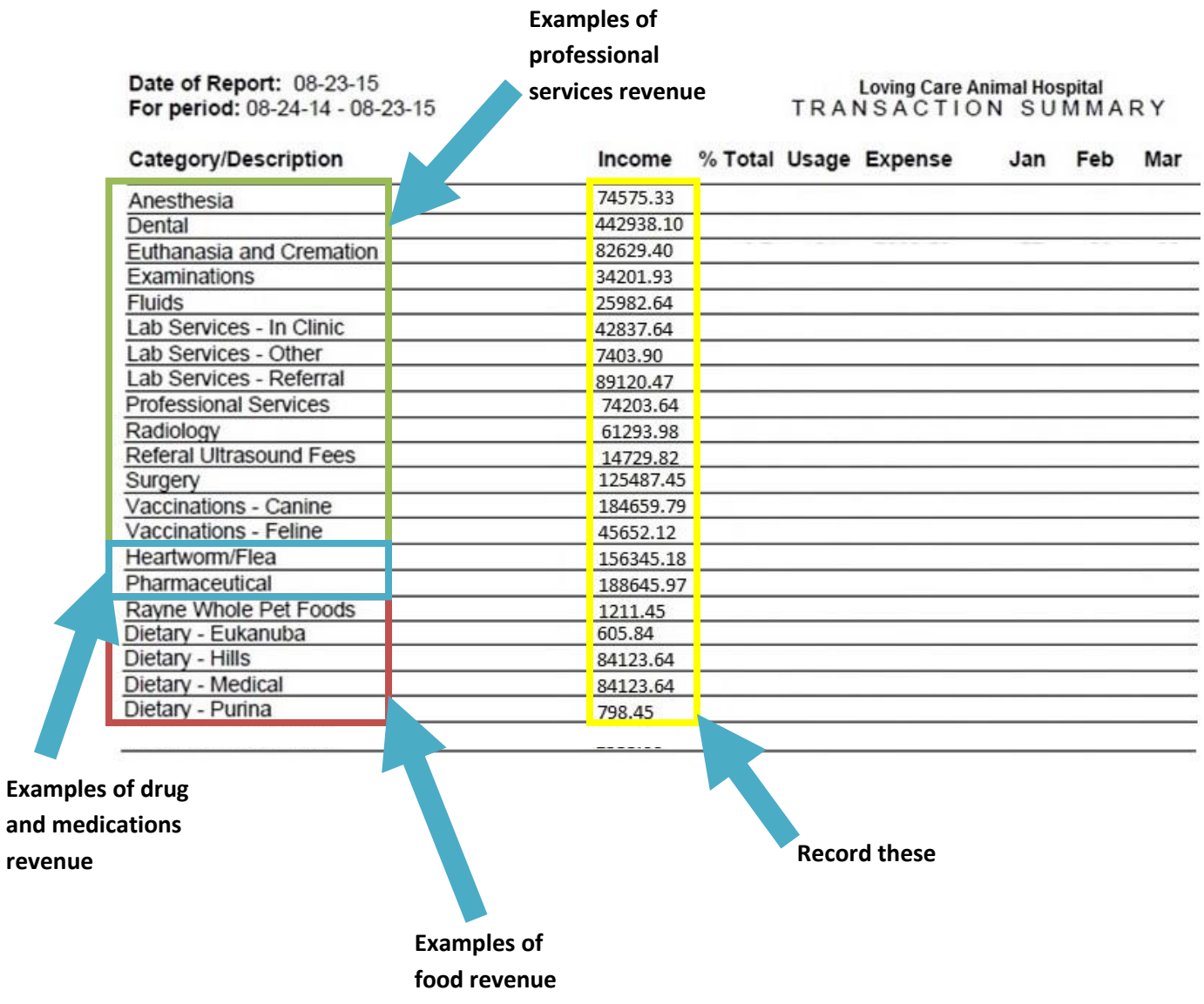
Sources of Revenue – Steps One and Two



Sources of Revenue – Steps Three through Six



Sources of Revenue – Figures to Record



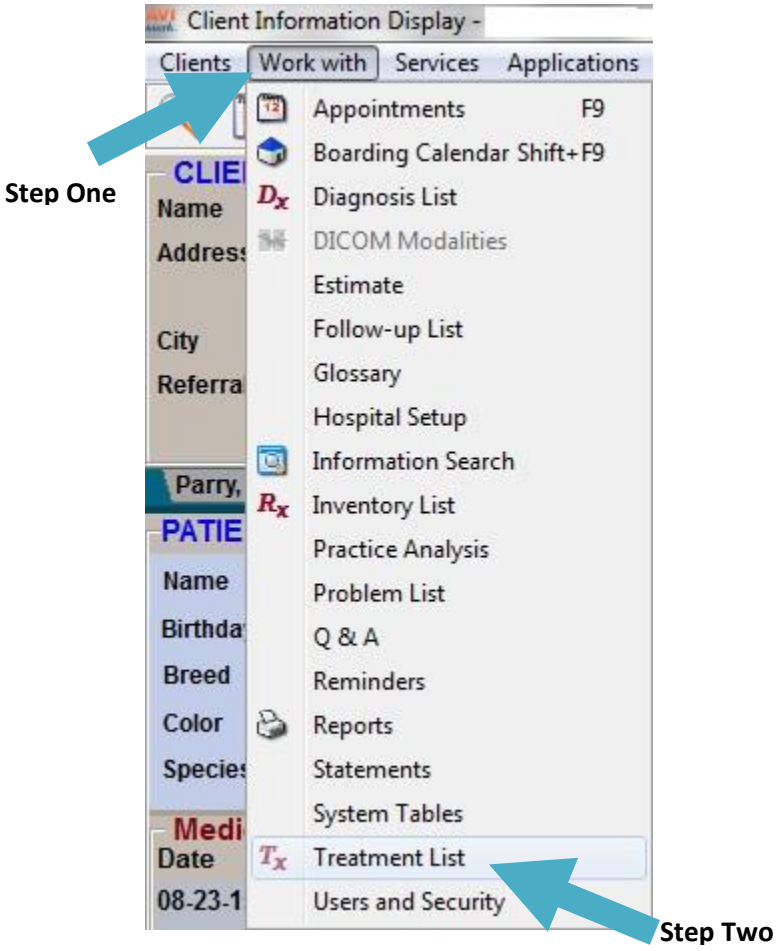
Fees

This section will walk you through how to find your fees in Avimark.

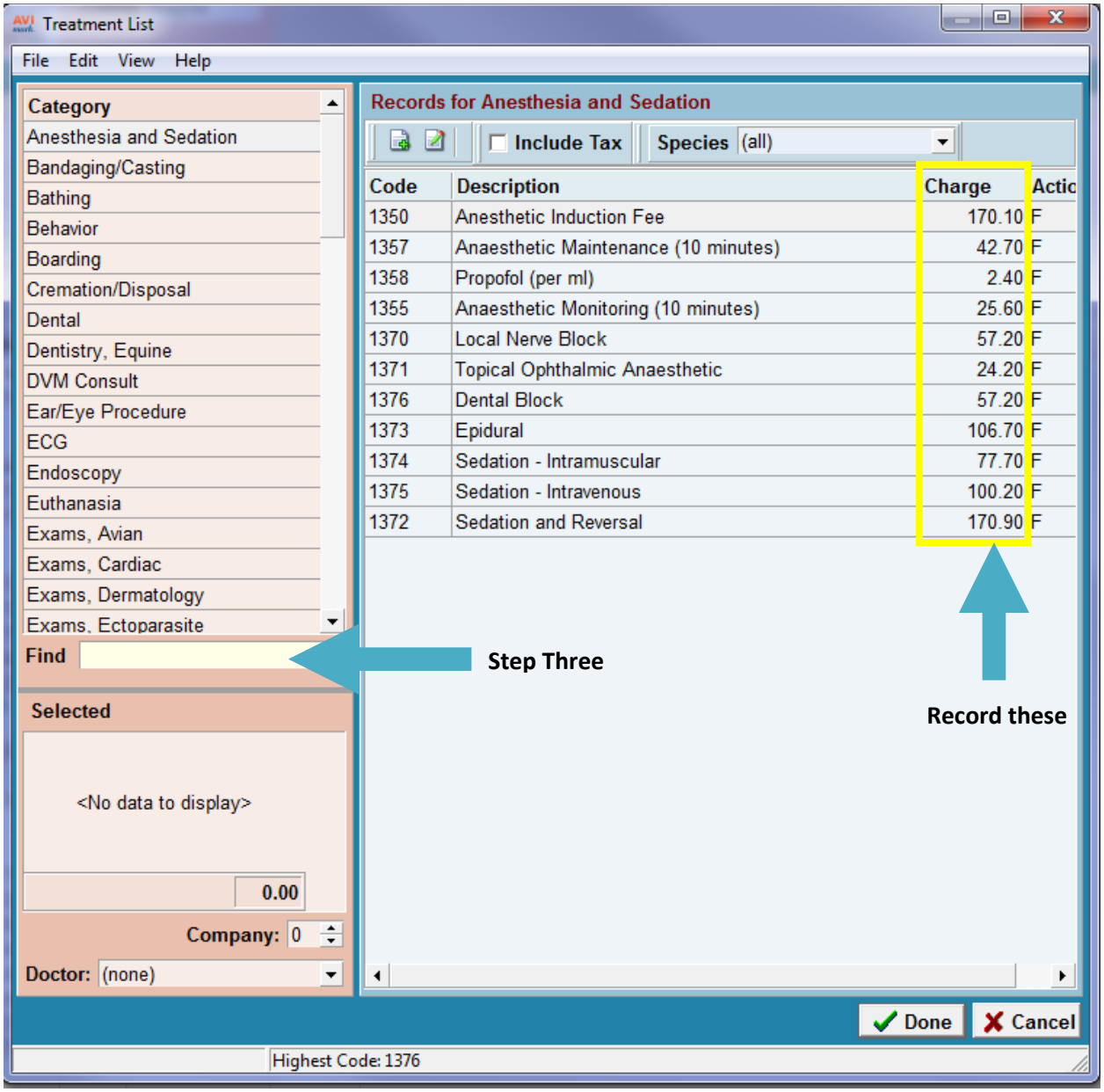
1. Select “Work with” from the toolbar
2. Pick “Treatment List” option
3. Use “Find” to search for various procedure fees, or browse through categories to find fees

Report the “Charge” for various procedures to the appropriate fee fields within the Practice Owners Economic Survey

Fees – Steps One and Two



Fees – Step Three



If you have any questions about finding data, please consult your software representative, or contact the OVMA office for instructions. Phone: 800.670.1702 or email: cdoherty@ovma.org