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

Step One

Step Two
Active and New Clients – Steps Three through Eight

Step Three:
- Step Four:
- Step Five:
- Step Six:
- Step Seven:
- Step Eight:
### Loving Care Animal Hospital

#### CLIENT RETENTION STATISTICS

<table>
<thead>
<tr>
<th>Date of Report: 23/08/2015</th>
<th>Loving Care Animal Hospital</th>
<th>Page: 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date: 24/08/2014</td>
<td>CLIENT RETENTION STATISTICS</td>
<td></td>
</tr>
<tr>
<td>End Date: 23/08/2015</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active clients at beginning of time frame</td>
<td></td>
</tr>
<tr>
<td>Active clients at end of time frame</td>
<td>1,945</td>
</tr>
<tr>
<td>New Clients</td>
<td>208</td>
</tr>
<tr>
<td>Active and New Clients</td>
<td></td>
</tr>
<tr>
<td>Clients Lost</td>
<td></td>
</tr>
<tr>
<td>% Clients Lost</td>
<td></td>
</tr>
<tr>
<td>% Clients Retained</td>
<td></td>
</tr>
</tbody>
</table>

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

Step Four

Step Five

Step Six
### Invoices and Gross Revenue – Figures to Record

<table>
<thead>
<tr>
<th>Description</th>
<th>TOTAL</th>
<th>COUNT</th>
<th>AVERAGE</th>
<th>% TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash Payments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Payments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Payments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production by Provider</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Invoices</strong></td>
<td>756,093.84</td>
<td>11,684</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Late Charges</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adjustments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Charges</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net change in A/R</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Clients</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient visits</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*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

Step Three

- Period: Fiscal year
- Start: 24/08/2014
- End: 23/08/2015
- Doctor: Consolidated
- Print To: R-ADV C5235/5240 PCL6c
- Preview

Step Four

- Print these...
  - Transaction Summary

Step Five

- Don’t print these...
  - Income by Treatment

Step Six

- Print
- Close
- Help
- Bottom line
## Sources of Revenue – Figures to Record

**Loving Care Animal Hospital**

**TRANSACTION SUMMARY**

<table>
<thead>
<tr>
<th>Category/Description</th>
<th>Income</th>
<th>% Total Usage</th>
<th>Expense</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anesthesia</td>
<td>74575.33</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dental</td>
<td>442938.10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Euthanasia and Cremation</td>
<td>82629.40</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Examinations</td>
<td>34201.93</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fluids</td>
<td>25382.54</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lab Services - In Clinic</td>
<td>42837.64</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lab Services - Other</td>
<td>7403.90</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lab Services - Referral</td>
<td>89120.47</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional Services</td>
<td>74203.64</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Radiology</td>
<td>61293.98</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Referral Ultrasound Fees</td>
<td>14729.82</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surgery</td>
<td>125487.45</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vaccinations - Canine</td>
<td>164659.79</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vaccinations - Feline</td>
<td>45652.12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Heartworm/Flea</strong></td>
<td>156345.18</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Pharmaceutical</strong></td>
<td>168845.97</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rayne Whole Pet Foods</td>
<td>1211.45</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dietary - Eukanuba</td>
<td>605.84</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dietary - Hills</td>
<td>84123.54</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dietary - Medical</td>
<td>84123.54</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dietary - Purina</td>
<td>796.45</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Examples of professional services revenue
- Anesthesia
- Dental
- Euthanasia and Cremation
- Examinations
- Fluids
- Lab Services - In Clinic
- Lab Services - Other
- Lab Services - Referral
- Professional Services
- Radiology
- Referral Ultrasound Fees
- Surgery
- Vaccinations - Canine
- Vaccinations - Feline
- Heartworm/Flea
- Pharmaceutical
- Rayne Whole Pet Foods
- Dietary - Eukanuba
- Dietary - Hills
- Dietary - Medical
- Dietary - Purina

### Examples of drug and medications revenue
- Examples of drug and medications revenue

### Examples of food revenue
- Examples of food revenue

Record these
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

**Step One**

- Appointments
- Boarding Calendar
- Diagnosis List
- DICOM Modalities
- Estimate
- Follow-up List
- Glossary
- Hospital Setup
- Information Search
- Inventory List
- Practice Analysis
- Problem List
- Q & A
- Reminders
- Reports
- Statements
- System Tables
- Treatment List
- Users and Security

**Step Two**
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