



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

### Active and New Clients

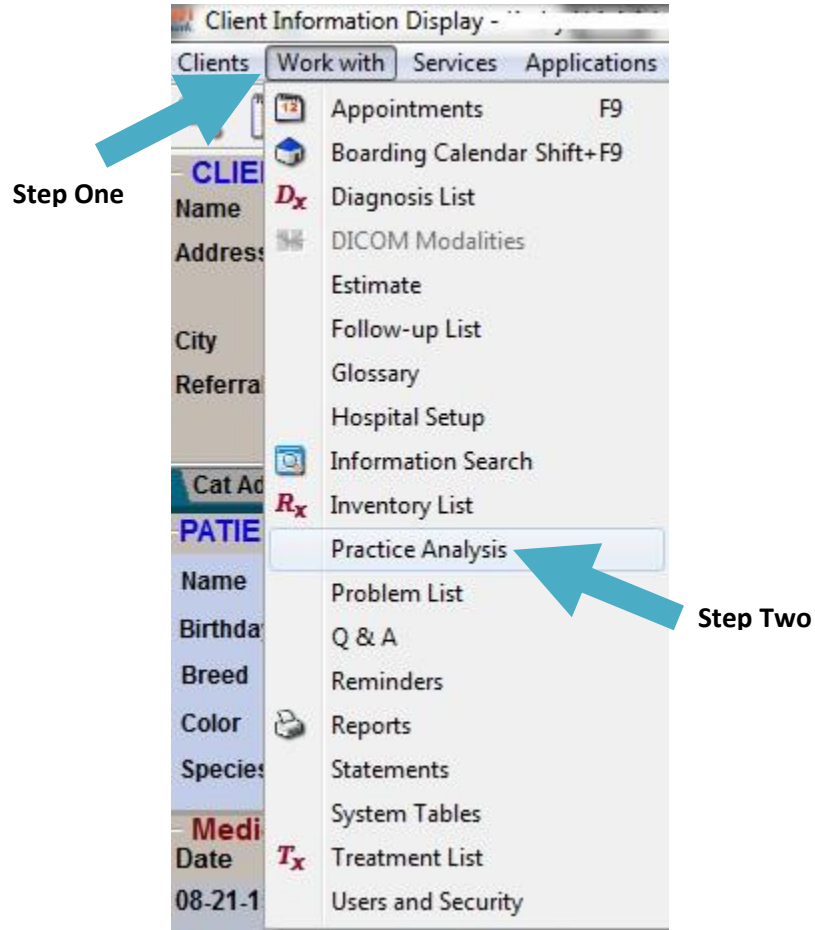
This section will walk you through how to find statistics on active and new clients in Avimark.

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

The screenshot shows the 'Practice Analysis' window with the following configuration:

- Step Three:** Period: Fiscal year; Start: 08/24/14; End: 8/23/2015
- Step Four:** Client Retention (selected under Reports)
- Step Five:** Doctor: (All doctors); Species: (All species); Age: < 3w; Zip Code: ; Company: 01
- Step Six:** Invoices After: 8/23/2014
- Step Seven:** Years to Compare: 1; Months to Compare: 0
- Step Eight:** Run button

Additional interface elements include: Print To: Canon iR3025; Quality: Letter; Preview checkbox; Done button; and a 'Step Five' label at the top right of the window.

## Active and New Clients – Figures to Record

Date of Report: 23/08/2015

Loving Care Animal Hospital  
CLIENT RETENTION STATISTICS

Page: 1

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

2015

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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

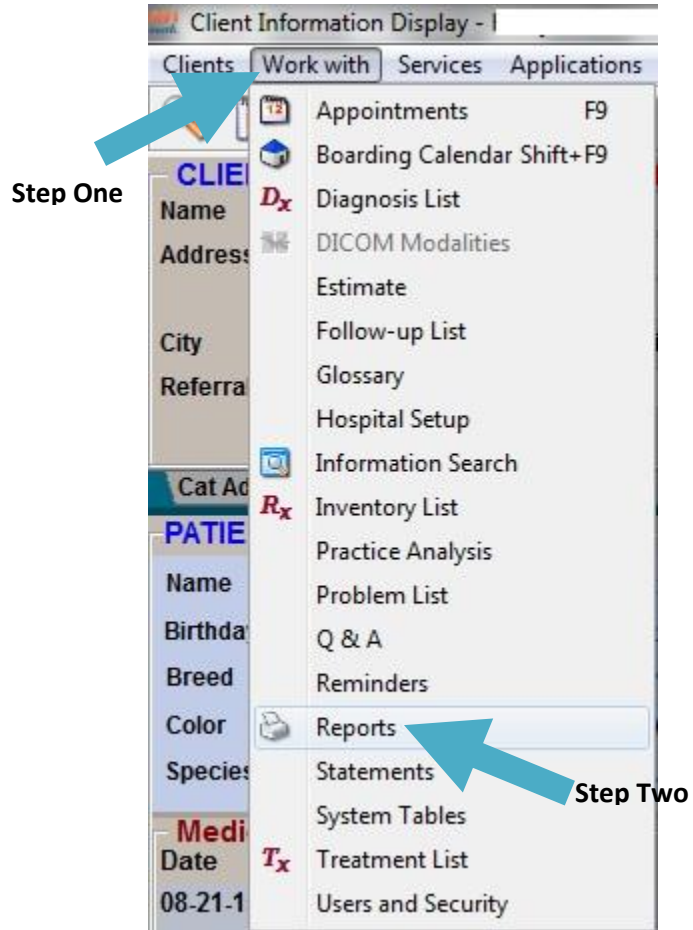
This section will walk you through how to find statistics on number of invoices and gross revenue in Avimark.

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

**End of Period Reports** **Step Three**

Print by

Period: Fiscal year    Doctor: Consolidated    Sort by: Name

Start: 08/24/14    Print To: Canon iR3025    Report code:

End: 08/23/2015     Preview    Company:     Client code:

Site: (all)

**PRINT THESE..**  Save

**Period Totals**

**DON'T PRINT THESE...**

- Account Summary
- Audit Trail
- Commission Report
- Controlled Substance
- Deposit Slip
- Held check Report
- Income by Company
- Income by Plan Activity
- Income by Provider
- Income by Treatment
- Inventory Used
- Open Invoices
- Patients by Treatment
- Payment Summary
- Rabies Report
- Recurring Payment
- Referral Report
- Sales Summary
- Tax By Area
- Transaction Journal
- Transaction Summary
- Treatment Control Log

**Step Five**

Bottom line    Income options

**CHARGES**

Treatments	
Inventory	
Adjustments	
Sales tax	
Late fees	

**PAYMENTS**

Cash	
Checks	
Held checks	
Mastercard	
Visa	
Discover	
Am Express	
Debit	
All others	

Print     Close     Help     Bottom line

Step Four

Step 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	<hr/>			
Check Payments	<hr/>			
Total Payments	<hr/>			
Production by Provider	<hr/>			
Total Invoices	756,093.84	11,684		
Late Charges	<hr/>			
Adjustments	<hr/>			
Total Charges	<hr/>			
Net change in A/R	<hr/>			
New Clients	<hr/>			
Patient visits	<hr/>			

  
**Record these**





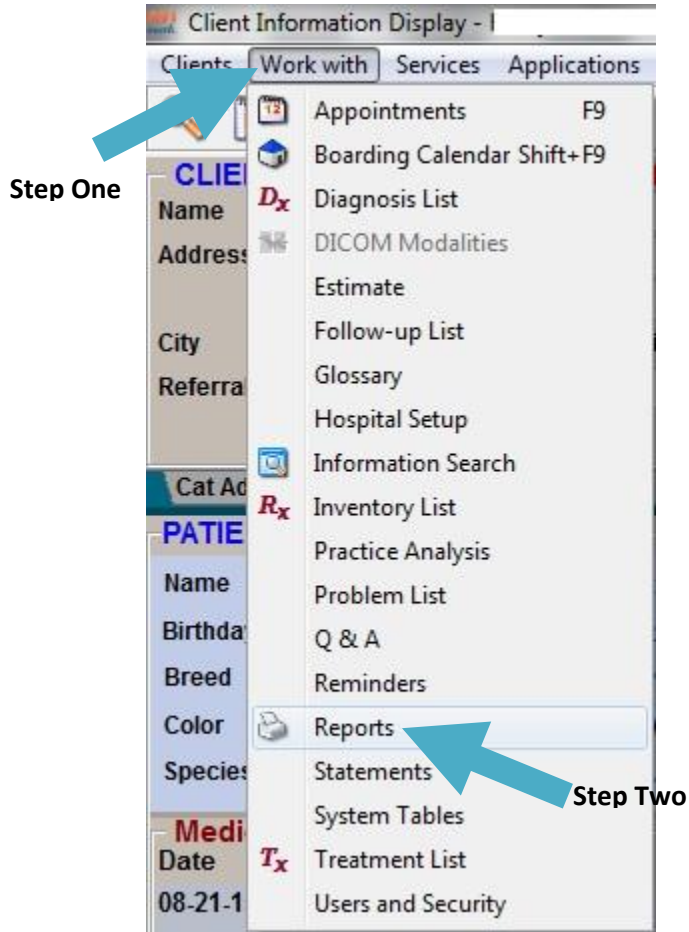
## Sources of Revenue

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

**End of Period Reports** Step Three

Print by

Period: Fiscal year  Doctor: Consolidated  Sort by: Name

Start: 24/08/2014  Print To: R-ADV C5235/5240 PCL5c  Report code:

End: 23/08/2015   Preview Company:  Client code:

Site: 0

**PRINT THESE..**  Save

Transaction Summary

**DON'T PRINT THESE...**

- Account Summary
- Audit Trail
- Controlled Substance
- Deposit Slip
- Held check Report
- Income by Company
- Income by Plan Activity
- Income by Provider
- Income by Treatment
- Inventory Used
- Open Invoices
- Patients by Treatment
- Payment Summary
- Period Totals
- Rabies Report
- Referral Report
- Sales Summary
- Tax By Area
- Transaction Journal
- Treatment Control L
- Unposted Transactions
- Wellness Plan Report

**Bottom line** **Income options**

**CHARGES**

Treatments	<input type="text"/>
Inventory	<input type="text"/>
Adjustments	<input type="text"/>
Sales tax	<input type="text"/>
Late fees	<input type="text"/>

**PAYMENTS**

Cash	<input type="text"/>
Checks	<input type="text"/>
Held checks	<input type="text"/>
Mastercard	<input type="text"/>
Visa	<input type="text"/>
Discover	<input type="text"/>
Am Express	<input type="text"/>
Debit	<input type="text"/>
All others	<input type="text"/>

Print  Close  Help  Bottom line

Step Four

Step Five

Step Six

## Sources of Revenue - Figures to Record

Date of Report: 08-23-15  
 For period: 08-24-14 - 08-23-15

**Examples of  
 professional  
 services revenue**

Loving Care Animal Hospital  
 TRANSACTION SUMMARY

Category/Description	Income	% Total Usage	Expense	Jan	Feb	Mar
Anesthesia	74575.33					
Dental	442938.10					
Euthanasia and Cremation	82629.40					
Examinations	34201.93					
Fluids	25982.64					
Lab Services - In Clinic	42837.64					
Lab Services - Other	7403.90					
Lab Services - Referral	89120.47					
Professional Services	74203.64					
Radiology	61293.98					
Referral Ultrasound Fees	14729.82					
Surgery	125487.45					
Vaccinations - Canine	184659.79					
Vaccinations - Feline	45652.12					
Heartworm/Flea	156345.18					
Pharmaceutical	188645.97					
Rayne Whole Pet Foods	1211.45					
Dietary - Eukanuba	605.84					
Dietary - Hills	84123.64					
Dietary - Medical	84123.64					
Dietary - Purina	798.45					

**Examples of drug  
 and medications  
 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

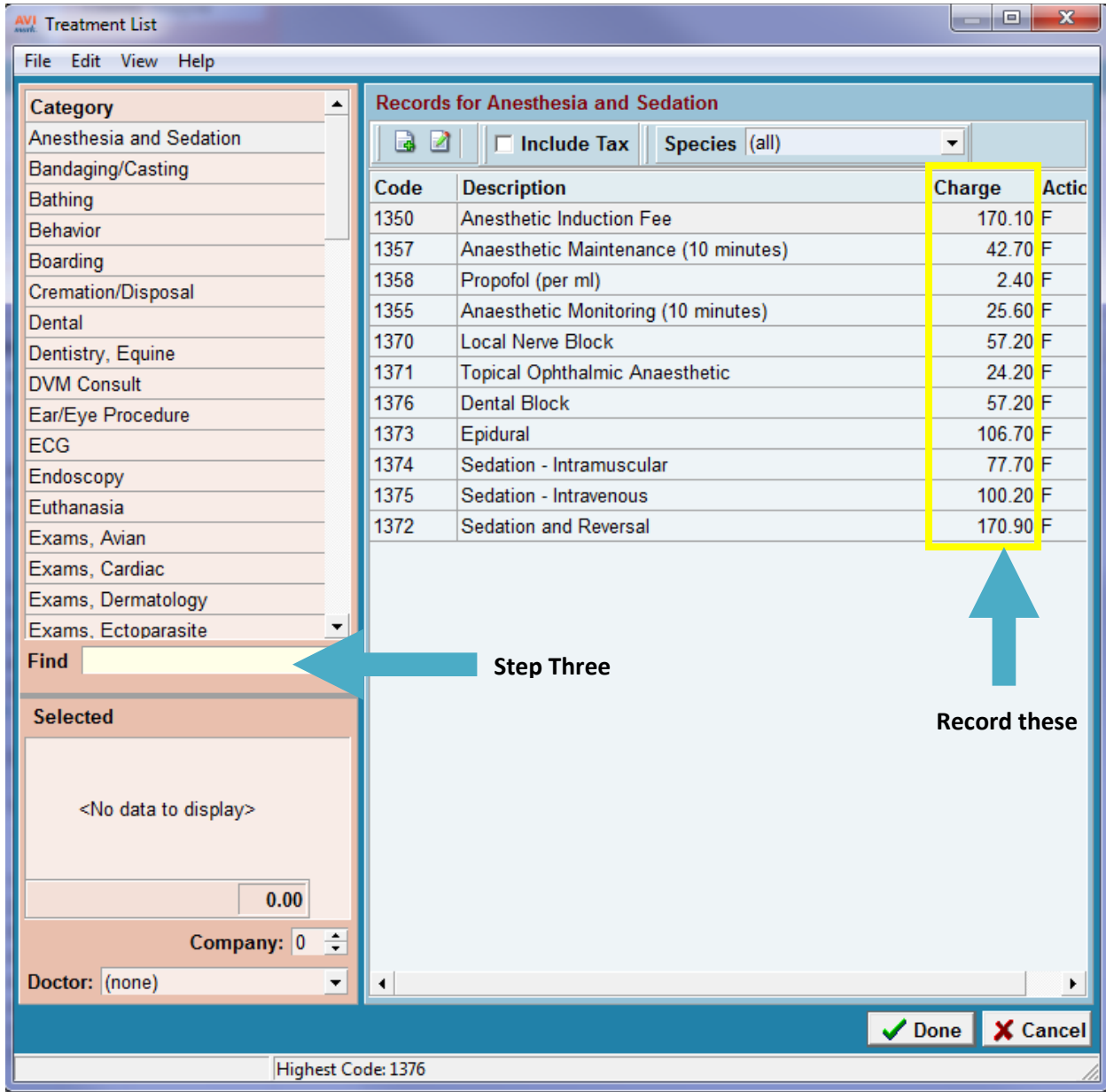
Report the “Charge” for various procedures to the appropriate fee fields within the Practice Owners Economic Survey

## Fees - Steps One and Two

The screenshot shows the 'Client Information Display' window with the 'Work with' menu open. The 'Clients' tab is selected, and the 'Treatment List' option is highlighted. Two blue arrows indicate the steps: 'Step One' points to the 'Clients' tab, and 'Step Two' points to the 'Treatment List' option.

Client Information	Work with	Services	Applications
CLIE	Appointments F9		
Name	Boarding Calendar Shift+F9		
Address	<b>D<sub>x</sub></b> Diagnosis List		
City	DICOM Modalities		
Referra	Estimate		
	Follow-up List		
	Glossary		
	Hospital Setup		
Parry,	Information Search		
PATIE	<b>R<sub>x</sub></b> Inventory List		
Name	Practice Analysis		
Birthda	Problem List		
Breed	Q & A		
Color	Reminders		
Species	Reports		
Medi	Statements		
Date	System Tables		
08-23-1	<b>T<sub>x</sub></b> Treatment List		
	Users and Security		

## Fees - Step Three



AVI Treatment List

File Edit View Help

**Category**

- Anesthesia and Sedation
- Bandaging/Casting
- Bathing
- Behavior
- Boarding
- Cremation/Disposal
- Dental
- Dentistry, Equine
- DVM Consult
- Ear/Eye Procedure
- ECG
- Endoscopy
- Euthanasia
- Exams, Avian
- Exams, Cardiac
- Exams, Dermatology
- Exams, Ectoparasite

**Records for Anesthesia and Sedation**

Include Tax    Species (all)

Code	Description	Charge	Actic
1350	Anesthetic Induction Fee	170.10	F
1357	Anaesthetic Maintenance (10 minutes)	42.70	F
1358	Propofol (per ml)	2.40	F
1355	Anaesthetic Monitoring (10 minutes)	25.60	F
1370	Local Nerve Block	57.20	F
1371	Topical Ophthalmic Anaesthetic	24.20	F
1376	Dental Block	57.20	F
1373	Epidural	106.70	F
1374	Sedation - Intramuscular	77.70	F
1375	Sedation - Intravenous	100.20	F
1372	Sedation and Reversal	170.90	F

Find

**Step Three**

**Record these**

Selected

<No data to display>

0.00

Company: 0

Doctor: (none)

Done     Cancel

Highest Code: 1376

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: [cdoherly@ovma.org](mailto:cdoherly@ovma.org)