



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

### **Active Clients, New Clients, Invoices and Gross Revenue**

This section will walk you through how to find statistics on active clients, new clients, invoices, and gross Revenue in Cornerstone.

1. Select “Reports” from the toolbar
2. Pick “Performance Tracker” option
3. In the “Tracking Period” box, highlight the past 12 full months. This is done by clicking first on the most recent full month, then scrolling up 12 months prior, and, while holding the “Shift” key, clicking on the appropriate month, thereby highlighting a full 12 month period
4. Leave the “Comparison Period” box as is; this section is not relevant to the statistics we are seeking
5. Click the “Retrieve” button. Cornerstone may generate an error message regarding overlapping data, simply click the “Yes” button to proceed

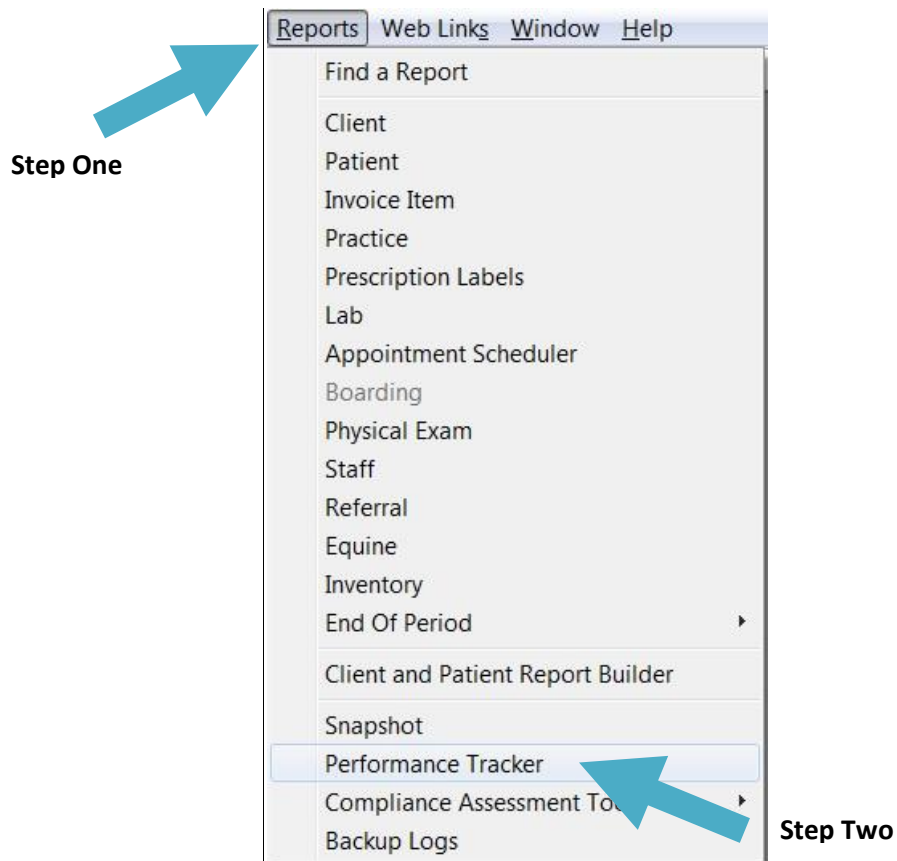
Report “Gross Sales” under the “Tracking Period” heading as Total veterinary revenue on the Practice Owners Economic Survey

Report “Total Number of Invoices” under the “Tracking Period” heading as Invoices on the Practice Owners Economic Survey

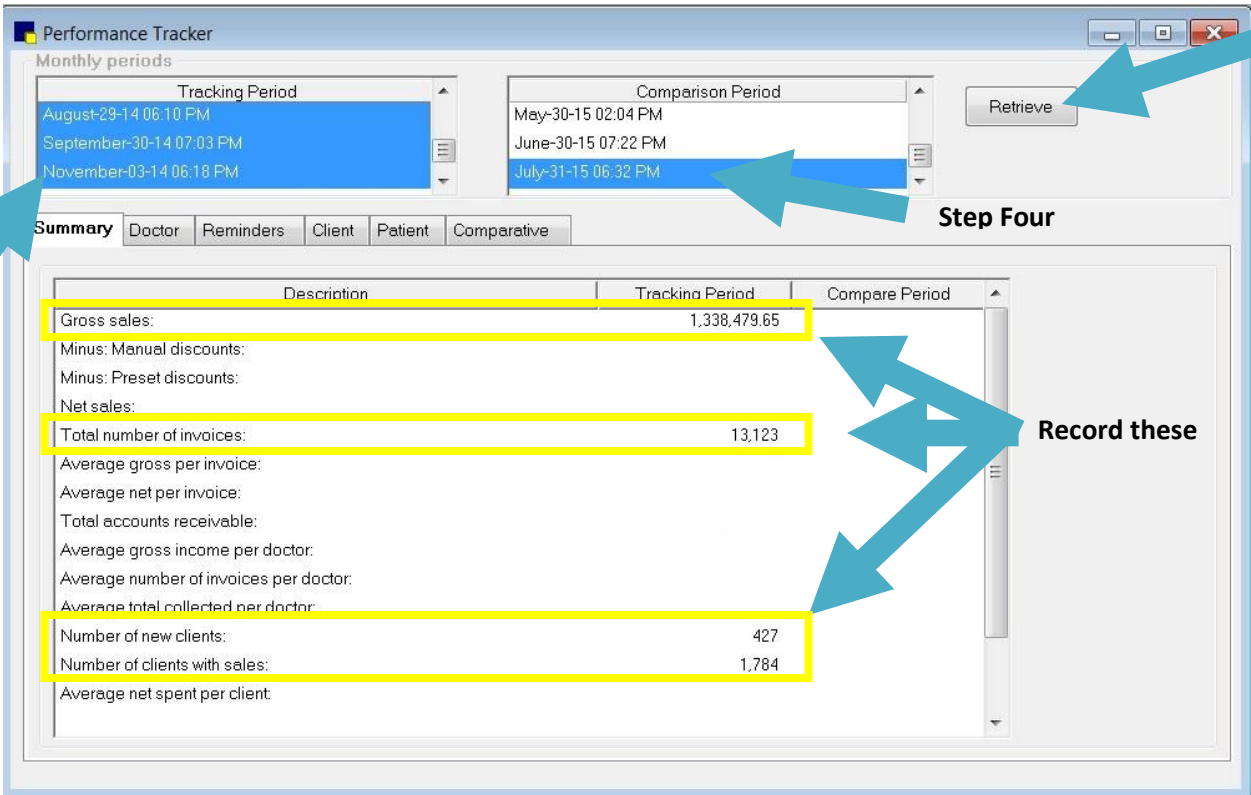
Report “Number of new clients” under the “Tracking Period” heading as New clients on the Practice Owners Economic Survey

Report “Number of clients with sales” under the “Tracking Period” heading as Active clients on the Practice Owners Economic Survey

## Active Clients, New Clients, Invoices and Gross Revenue – Steps One and Two



## Active Clients, New Clients, Invoices and Gross Revenue – Steps Three through Five



The screenshot shows the 'Performance Tracker' application window. It features two dropdown menus for selecting 'Tracking Period' and 'Comparison Period', a 'Retrieve' button, and a 'Summary' tab. The 'Summary' tab displays a table of performance metrics. Annotations with arrows point to specific elements: 'Step Three' points to the 'Tracking Period' dropdown, 'Step Four' points to the 'Comparison Period' dropdown, and 'Step Five' points to the 'Retrieve' button. A large blue arrow labeled 'Record these' points to the data table.

**Step Three**

**Step Four**

**Step Five**

**Record these**

Description	Tracking Period	Compare Period
Gross sales:	1,338,479.65	
Minus: Manual discounts:		
Minus: Preset discounts:		
Net sales:		
Total number of invoices:	13,123	
Average gross per invoice:		
Average net per invoice:		
Total accounts receivable:		
Average gross income per doctor:		
Average number of invoices per doctor:		
Average total collected per doctor:		
Number of new clients:	427	
Number of clients with sales:	1,784	
Average net spent per client:		

## Overview of Sources of Revenue

This section will walk you through how to find an overview of sources of revenue in Cornerstone.

1. Select “Reports” from the toolbar
2. Pick “End of Period” option
3. From this menu, pick “End of Month”
4. Within the “Report list” box, select the title “Inventory Sales Report – Closed Invoices – By Class By Desc.”
5. Within the “Monthly periods” box, select the past 12 full months. This is done by clicking first on the most recent full month, then scrolling up 12 months prior, and, while holding the “Shift” key, clicking on the appropriate month, thereby highlighting a full 12 month period
6. Click the “Preview” button
7. This will generate a pop-up titled “End of Period Filters”; simply leave this pop-up as is, and click the “OK” button
8. (Optional) To facilitate addition of categories for reporting, click on “Save” button and then set “Save as type” to “Excel format”. This will allow the report to be opened in Excel, and thus figures to be added together in a more simple manner

Revenue will be presented in a variety of class descriptions, as outlined in your set up of Cornerstone. Group each class description 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 class descriptions 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).

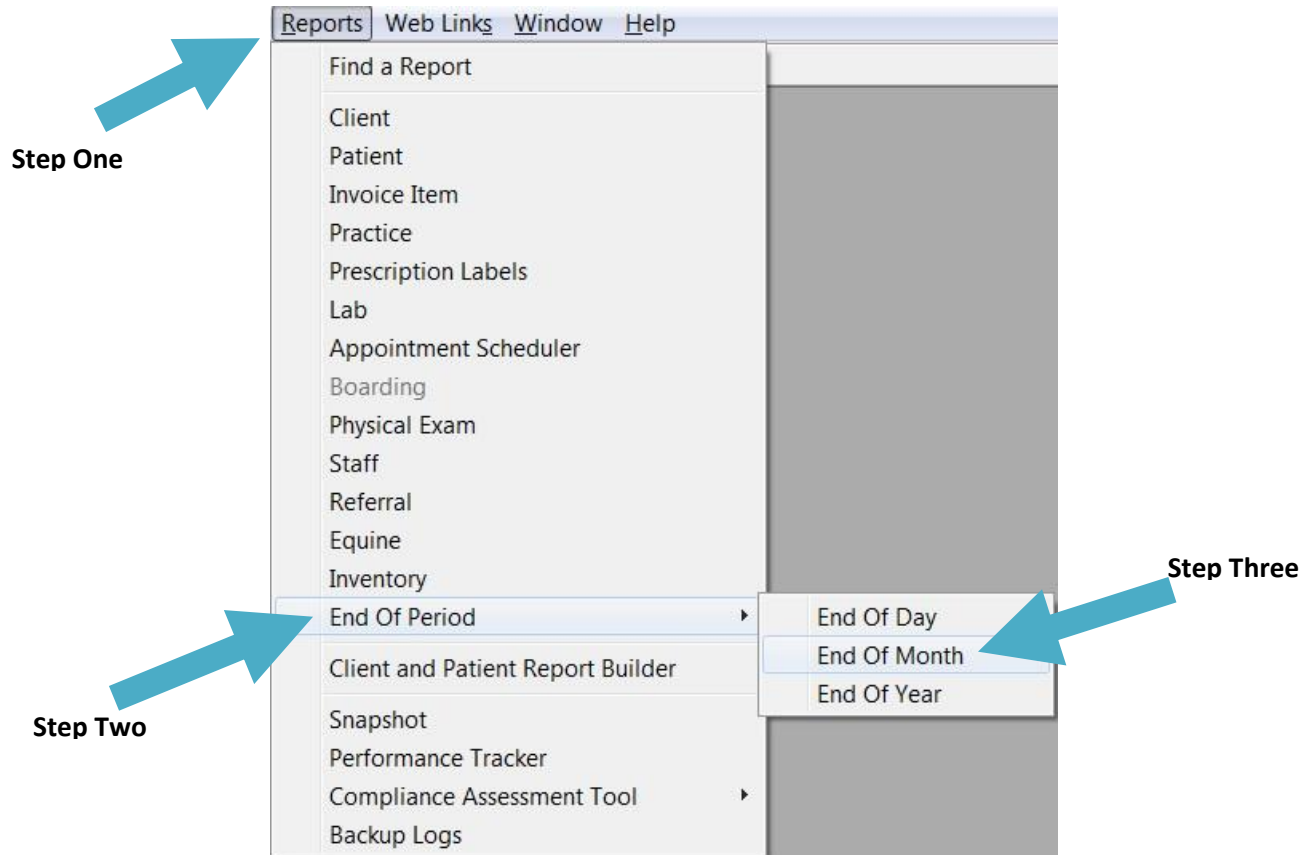
Report revenues generated from the sales of drugs and medications within the appropriate area on the Practice Owners Economic Survey

Report revenues generated from food sales within the appropriate area on the Practice Owners Economic Survey

Report revenues generated from professional services within the appropriate area on the Practice Owners Economic Survey

To generate detailed breakdowns of revenue sources, refer to final two sections of this document.

## Overview of Sources of Revenue – Steps One through Three



## Overview of Sources of Revenue – Steps Four through Seven

The screenshot displays two software windows. The top window, titled 'Monthly Reports', contains a 'Monthly periods' table and a 'Report list'. The bottom window, titled 'End of Period Filters', contains a 'Range' table and 'OK'/'Cancel' buttons. Teal arrows point to specific elements, labeled 'Step Four' through 'Step Seven'.

**Monthly Reports Window**

**Monthly periods**

Closing	Processed
7/31/14	July-31-14 07:24 PM
8/29/14	August-29-14 06:10 PM
9/30/14	September-30-14 07:03 PM
11/03/14	November-03-14 06:18 PM

**Report list**

- Referral Summary by Revenue Center - Doctor by Hospital
- Referral Summary by Revenue Center- Hospital by Doctor
- Returned Check Summary
- Sales Tax Summary - By Revenue Center
- Sales Tax Summary/Income Reconciliation - Closed Invoices
- Serv. and Inv. Sales - Closed Inv. - By Class Desc.**
- Serv. and Inv. Sales - Closed Inv. - By Class ID
- Serv. and Inv. Sales - Closed Inv. - By Staff ID
- Serv. and Inv. Sales - Closed Inv. - By Staff Last Name
- Serv. And Inv. Sales by Revenue Center - Class Desc
- Serv. And Inv. Sales by Revenue Center - Class ID
- Serv. And Inv. Sales by Revenue Center - Staff ID
- Serv. And Inv. Sales by Revenue Center - Staff Last Name
- Serv. Sales Report - Closed Invoices - By Class By Desc.
- Serv. Sales Report - Closed Invoices - By Class By ID

**End of Period Filters Window**

**Range**

Description	Starting value	Ending value	And/Or
Class ID			

**Annotations:**

- Step Four:** Points to 'Serv. and Inv. Sales - Closed Inv. - By Class Desc.' in the Report list.
- Step Five:** Points to the 'Monthly periods' table.
- Step Six:** Points to the 'Preview' button.
- Step Seven:** Points to the 'OK' button.

## Overview of Sources of Revenue – Figures to Record

**Examples of drug and medications revenue**

	A	B	C	D	E	F	G
1	item_type	class_id	class_desc	subclass_id	subclass_desc	tvl_qty_sold	tvl_sales
2	I	DRG LOG	Inv, Controlled Drugs			9611.1132	3814.824
3	I	HW/FLEA	Inv, Heartworm, Flea & Tick			6107.075	131392.95
4	I	OTC	Inv, Over the Counter			1042.3404	16401.474
5	I	PKGS	Inv, Packaged Drugs			2685.4675	60531.792
6	I	PILLS	Inv, Pills&Dispensed Liquids			94843.749	102373.36
7	S	6	DRUGS	CAN	Canine	4.68	209.6172
8	I	FOODKEN	Inv, Hills Food - Kennel Packs			7.8	421.83
9	I	FOODTRE	Inv, Hills Food - Treats			8	72.784
10	I	FOODCAN	Inv, Hill's Food- Cans			5747.84	15609.026
11	I	FOODCAN	Inv, Hill's Food- Cans	CANINE	Canine	26.73	50.2425
12	I	FOODCAN	Inv, Hill's Food- Cans	FELINE	Feline	849.99	1845.5745
13	I	FOODLG	Inv, Hill's Food- Large Bags			336.96	35166.917
14	I	FOODSM	Inv, Hill's Food -Sm/Md Bags			1325.61	40731.793
15	I	FOODSM	Inv, Hill's Food -Sm/Md Bags	FELINE	Feline	17.6	560.307
16	I	MCRCCAN	Inv, MCRC Food - Cans			8913.84	22188.582
17	I	MCRCKEN	Inv, MCRC Food - Kennel Packs			50.7	448.968
18	I	MCRCLRG	Inv, MCRC Food - Large Bags			541.2	45879.642
19	I	MCRCS/M	Inv, MCRC Food - Sm/Med Bags			5592	179465.7
20	I	MCRCTRT	Inv, MCRC Treats			622.72	5769.4
21	I	FOODOTH	Inv, Other Food			1100.88	14304.975
22	I	FOODTRT	Inv, Other Treats			823.89	8867.9013
23	S	3	HOSPITAL			30.55	1646.775
24	S	3	HOSPITAL	CAN	Canine	652.23	25923.51
25	S	3	HOSPITAL	FEL	Feline	622.32	17303.84
26	S	7	LABORATORY			7.84	604.576
27	S	7	LABORATORY	CAN	Canine	1496.88	106663.49
28	S	7	LABORATORY	FEL	Feline	343.65	27391.454
29	S	1	OFFICE PROC.			286.2	16671.582
30	S	1	OFFICE PROC.	CAN	Canine	2215.53	106150.82
31	S	1	OFFICE PROC.	FEL	Feline	1010.075	53045.19
32	S	5	RADIOLOGY	CAN	Canine	164.775	16838.991
33	S	5	RADIOLOGY	FEL	Feline	130	16567.59
34	S	4	SURGERY			142.8	-3.702
35	S	4	SURGERY	CAN	Canine	1270.64	167797.73
36	S	4	SURGERY	FEL	Feline	427.56	40565.459
37	S	2	VACCINES	CAN	Canine	3806.55	130254.3
38	S	2	VACCINES	FEL	Feline	1498.575	49471.454

**Examples of food revenue**

**Examples of professional services revenue**

**Record these**



## Fees

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

1. Select “Lists” from the toolbar
2. Pick “Invoice Item” option
3. Use “Description” field to search for procedures, or browse through the list below
4. Procedures that are billed as a group will have a price of \$0.00. In order to determine the price, highlight the procedure and click the “Update” button. This will open the “Invoice Item Information” box
5. Within the “Invoice Item Information” box, click on the “Group Items” tab. This will show a list of the grouped items and their individual prices, as well as the total price

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



## Fees – Steps One and Two

**Step One** →

**Lists** Controls Inventory Tools Reports W

- Client
- Patient
- Census F3
- Species
- Diagnostic Codes
- Vital Signs/Weight
- Referrals ▶
- Physical Exam ▶
- Electronic Whiteboard ▶
- Practice
- Staff
- Cashier ID
- Room
- Patient Hospital Status
- Ward/Loc
- Postal Codes
- Revenue Centers
- Partnerships
- Call Back Notes
- Invoice Item** → **Step Two**
- Invoice Item Class
- Travel Sheets
- Departing Instructions
- Prescription Instructions
- Staff Commission
- Staff Classification Commission
- Documents ▶

## Fees – Steps Three and Four

**Invoice Item List**

Invoice item classification  
 Classification:

Search by  
☒ Description  
☐ Item ID

Invoice item information  
 Description:   
 Item ID:  ☒ Search for word

Include  
☒ Group items  
☐ Inventory items  
☒ Service items  
☒ Pick items  
☒ Dispensing item  
☐ Inactive items

Buttons: New, **Update**, Delete, Select, Close

Description	Classification	Price	ID	Type		
K9 - Spay - >40 kg	SURGERY	\$0.00	365	G		\$
K9 - Spay 10-20 kg	SURGERY	\$0.00	55	G		\$
<b>K9 - Spay 20-40 kg</b>	<b>SURGERY</b>	<b>\$0.00</b>	<b>56</b>	<b>G</b>		<b>\$</b>
K9 - Spay <10 kg	SURGERY	\$0.00	54	G		\$
K9 - Spay-Mature	SURGERY	\$0.00	57	G		\$
K9 - TPLO Cruciate Repair Surgery	SURGERY	\$0.00	620	G		\$
K9 4Dx & Wellness, FT4 (4DXWT)*	LABORATORY	\$186.90	1006	S		\$
K9 4Dx Plus & Wellness 1 Profile (4DXW)*	LABORATORY	\$132.90	SC0130	S		\$
K9 4Dx Plus Heartworm Test (4DX)*	LABORATORY	\$55.00	SC0136	S		\$
K9 4Dx, Wellness 1 Profile, T4 (4DXWCT)*	LABORATORY	\$174.90	SC0132	S		\$

**Step Three**

**Step Four**

**Record these**

## Fees – Step Five

Invoice Item Information for K9 - Spay 10-20 kg

ID: 55 K9 - Spay 10-20 kg ☐ Inventory ☐ Service ☒ Group ☐ Pick ☐ Dispensing

Info **Group Items** Travel

Copy from  
Copy line items from group ID:

**Step Five**

Group items

	Item ID	Description	Quantity	Amount	Smart?
1	SC0077	K9 Ovariohysterectomy 10-20kg	1.0	\$310.70	Yes
2	SC0053	K9 IV - Catheter/Fluids with Surgery	1.0	\$85.20	No
3	SC0095	K9 Injection - pain management	1.0	\$27.50	No
4	SC0051	K9 Medication - Oral per day	0.0	\$0.00	No
5	760	SURGERY - Post-Surgical Laser Treatment	1.0	\$0.00	No
6	SC0010	K9 Complimentary nail trim	1.0	\$0.00	No
7	869	Puppy Program Discount		\$0.00	Yes
8					
9					
10					
11					
12					
13					

Printing option:

Total: \$423.40

Record these

OK  
Cancel  
Print



## Detailed Breakdown of Inventory Revenue Sources

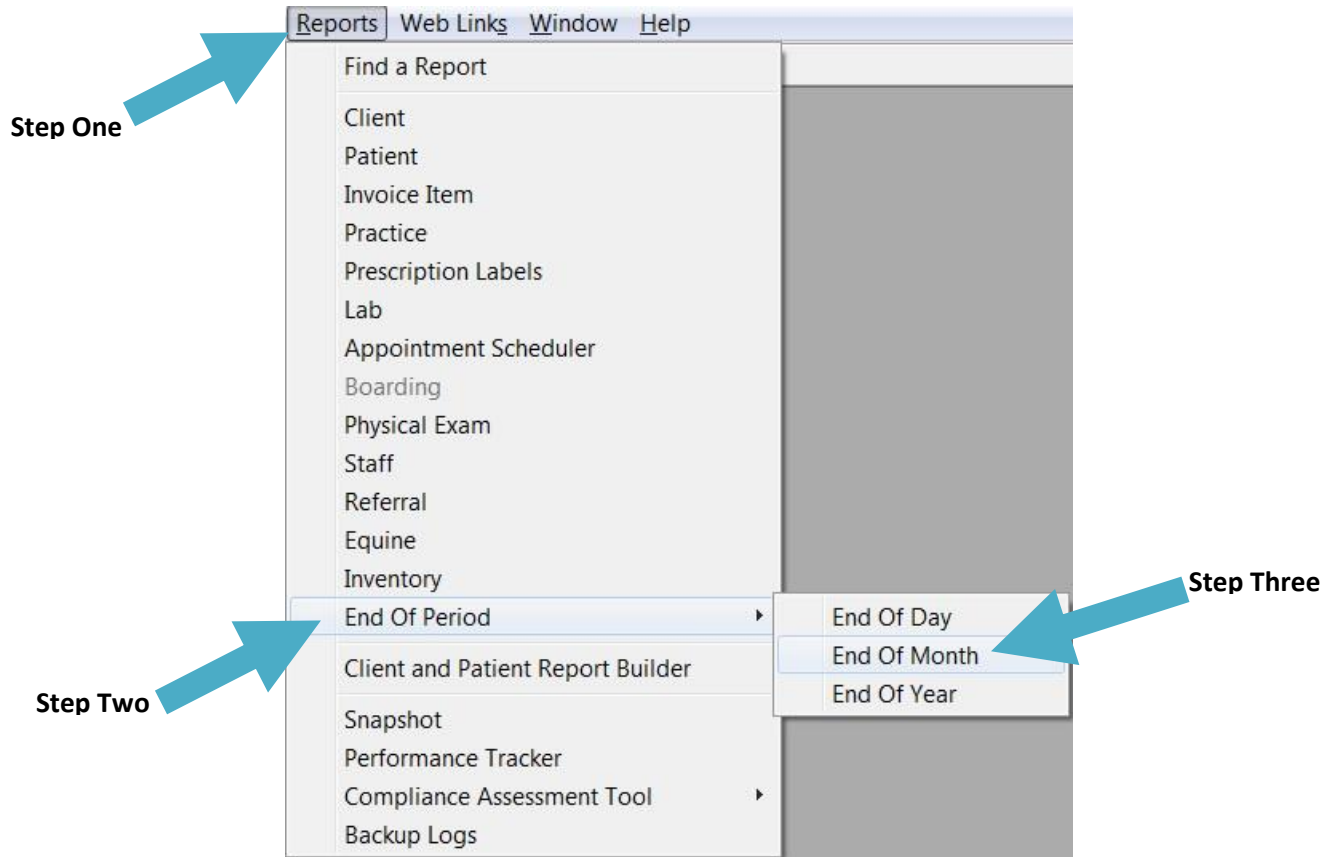
This section will walk you through how to find a detailed breakdown of inventory sales for sources of revenue in Cornerstone

1. Select “Reports” from the toolbar
2. Pick “End of Period” option
3. From this menu, pick “End of Month”
4. Within the “Report list” box, select the title “Inventory Sales Report – Closed Invoices – By Class By Desc.”
5. Within the “Monthly periods” box, select the past 12 full months. This is done by clicking first on the most recent full month, then scrolling up 12 months prior, and, while holding the “Shift” key, clicking on the appropriate month, thereby highlighting a full 12 month period
6. Click the “Preview” button
7. This will generate a pop-up titled “End of Period Filters”; simply leave this pop-up as is, and click the “OK” button
8. (Optional) To facilitate addition of categories for reporting, click on “Save” button and then set “Save as type” to “Excel format”. This will allow the report to be opened in Excel, and thus figures to be added together in a more simple manner

Report revenues generated from the sales of drugs and medications within the appropriate area on the Practice Owners Economic Survey

Report revenues generated from food sales within the appropriate area on the Practice Owners Economic Survey

## Detailed Breakdown of Inventory Revenue Sources – Steps One through Three



## Detailed Breakdown of Inventory Revenue Sources – Steps Four through Seven

The screenshot displays two overlapping software windows. The top window, titled 'Monthly Reports', contains a 'Monthly periods' table and a 'Report list'. The bottom window, titled 'End of Period Filters', contains a 'Range' table and 'OK'/'Cancel' buttons. Teal arrows point from text labels to specific elements in both windows.

**Step Five** points to the 'Monthly periods' table in the 'Monthly Reports' window.

Closing	Processed
5/30/15	May-30-15 02:04 PM
6/30/15	June-30-15 07:22 PM
7/31/15	July-31-15 06:32 PM
8/25/15	Current

**Step Four** points to the 'Inventory Sales Report - Closed Invoices - By Class By Desc.' entry in the 'Report list' of the 'Monthly Reports' window.

**Step Six** points to the 'Preview' button in the 'Monthly Reports' window.

**Step Seven** points to the 'OK' button in the 'End of Period Filters' window.

The 'End of Period Filters' window shows the following 'Range' table:

Description	Starting value	Ending value	And/Or
Class ID			



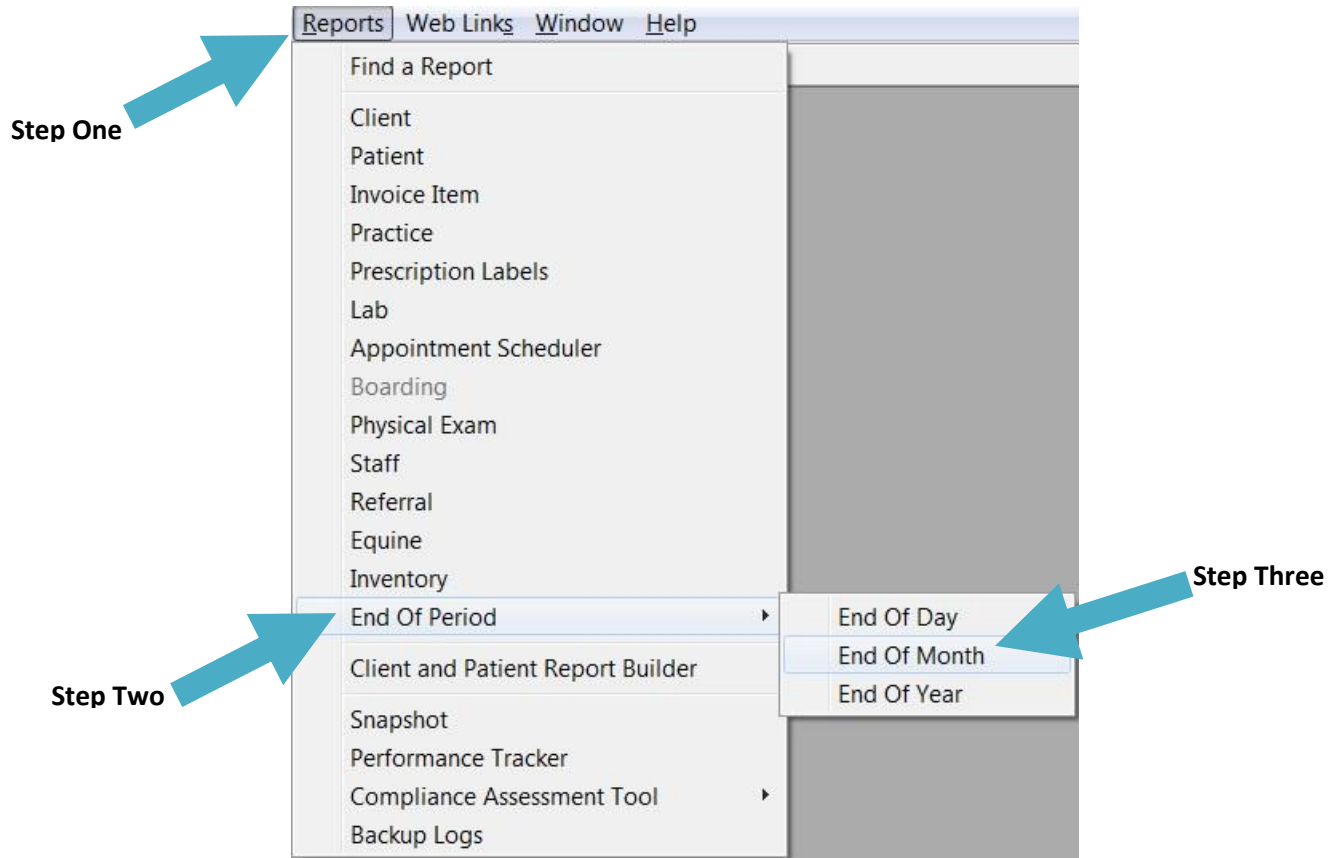
## Detailed Breakdown of Veterinary Services Revenue Sources

This section will walk you through how to find a detailed breakdown of inventory sales for sources of revenue in Cornerstone

1. Select “Reports” from the toolbar
2. Pick “End of Period” option
3. From this menu, pick “End of Month”
4. Within the “Report list” box, select the title “Serv. Sales Report – Closed Invoices – By Class By Desc.”
5. Within the “Monthly periods” box, select the past 12 full months. This is done by clicking first on the most recent full month, then scrolling up 12 months prior, and, while holding the “Shift” key, clicking on the appropriate month, thereby highlighting a full 12 month period
6. Click the “Preview” button
7. This will generate a pop-up titled “End of Period Filters”; simply leave this pop-up as is, and click the “OK” button
8. (Optional) To facilitate addition of categories for reporting, click on “Save” button and then set “Save as type” to “Excel format”. This will allow the report to be opened in Excel, and thus figures to be added together in a more simple manner

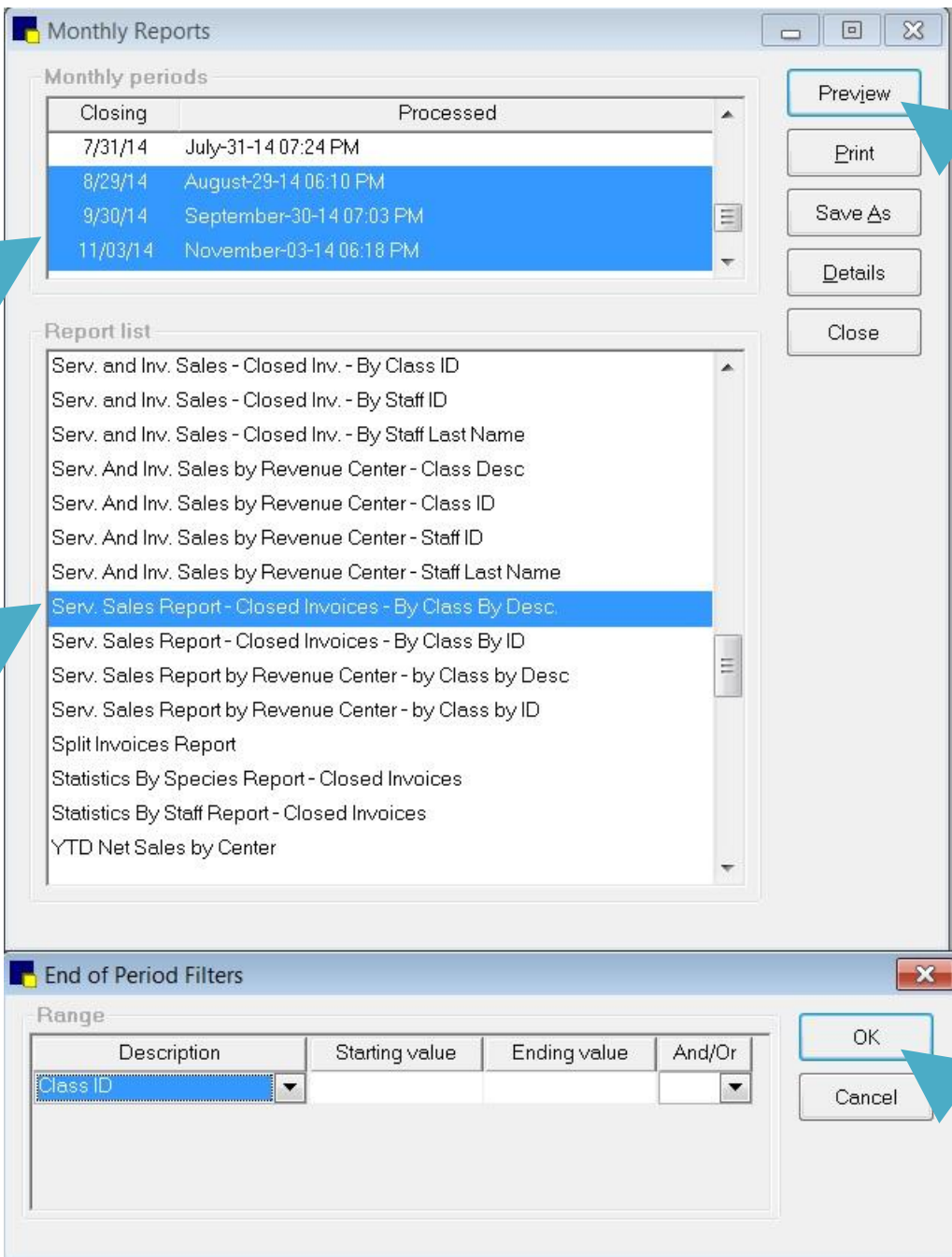
Report revenues generated from professional services within the appropriate area on the Practice Owners Economic Survey

## Detailed Breakdown of Veterinary Services Revenue Sources – Steps One through Three





## Detailed Breakdown of Veterinary Services Revenue Sources – Steps Four through Seven



The screenshot shows two overlapping windows from a veterinary software application. The top window is titled 'Monthly Reports' and contains a 'Monthly periods' table and a 'Report list'. The bottom window is titled 'End of Period Filters' and contains a 'Range' table. Arrows point to specific elements in each window, labeled 'Step Four' through 'Step Seven'.

**Step Five:** Points to the 'Monthly periods' table in the 'Monthly Reports' window.

Closing	Processed
7/31/14	July-31-14 07:24 PM
8/29/14	August-29-14 06:10 PM
9/30/14	September-30-14 07:03 PM
11/03/14	November-03-14 06:18 PM

**Step Four:** Points to the 'Report list' in the 'Monthly Reports' window.

- Serv. and Inv. Sales - Closed Inv. - By Class ID
- Serv. and Inv. Sales - Closed Inv. - By Staff ID
- Serv. and Inv. Sales - Closed Inv. - By Staff Last Name
- Serv. And Inv. Sales by Revenue Center - Class Desc
- Serv. And Inv. Sales by Revenue Center - Class ID
- Serv. And Inv. Sales by Revenue Center - Staff ID
- Serv. And Inv. Sales by Revenue Center - Staff Last Name
- Serv. Sales Report - Closed Invoices - By Class By Desc.**
- Serv. Sales Report - Closed Invoices - By Class By ID
- Serv. Sales Report by Revenue Center - by Class by Desc
- Serv. Sales Report by Revenue Center - by Class by ID
- Split Invoices Report
- Statistics By Species Report - Closed Invoices
- Statistics By Staff Report - Closed Invoices
- YTD Net Sales by Center

**Step Six:** Points to the 'Preview' button in the 'Monthly Reports' window.

**Step Seven:** Points to the 'OK' button in the 'End of Period Filters' window.

Description	Starting value	Ending value	And/Or
Class ID			

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](mailto:cdoherty@ovma.org)