How to Find Required Data for the Practice Owners Economic Survey Using Impromed's Infinity

New Clients, Invoices, Gross Revenue, and Sources of Revenue

This section will walk you through how to find statistics on new clients, invoices, gross revenue, and sources of revenue in Impromed's Infinity.

1. Select "Modules" from the toolbar
2. Pick "Reports" option
3. Expand the category "Financial Reports"
4. Select the "Summary Report" option
5. Click "Print"
6. This will generate a dialogue box called "Report Date Ranges" in which you set the date range to run the report on; set this date range to start a year prior and end on today's date (or whichever 12 month period you wish to report on)
7. Click "OK"
8. This will generate a dialogue box called "Summary Report"; you may either print the report by clicking "OK" or may view the report on your computer screen by clicking on "Preview"

Report "Total Products Invoiced" under the "Invoices/Products" heading as Total veterinary revenue on the Practice Owners Economic Survey

Report "Invoices" under the "Statistics" heading as Invoices on the Practice Owners Economic Survey

Report "New Clients" under the "Statistics" heading as New clients on the Practice Owners Economic Survey

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

Note: It is not recommended to use the figure for "Clients" from the Summary Report for Active clients, as the number generated is not reliably accurate

New Clients, Invoices, Gross Revenue, and Sources of Revenue – Steps One and Two

Step One →

Step Two →

Modules | Invoice | Database | Setup | Tools

- Accounts Receivable
- Certificates
- Database
- EasyTime Appointment Scheduler
- Image Viewer
- Inventory
- Lab Results Import
- Labels
- Medical Records
- Patient Processing
- Reports
- Take Home Instructions
- General Ledger Link
- Message Center
- Documents
- Time Management
- InfoCenter
- Travel Sheets
- Clinic Census
- Setup Screens
- Transaction Corrections

New Clients, Invoices, Gross Revenue, and Sources of Revenue – Steps Three through Five

New Clients, Invoices, Gross Revenue, and Sources of Revenue – Steps Six through Eight
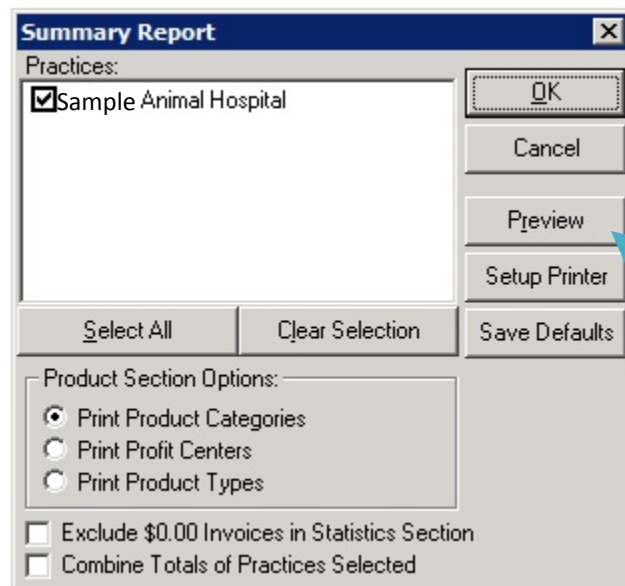
Step Six

Step Seven

Step Eight

New Clients, Invoices, Gross Revenue, and Sources of Revenue – Figures to Record

Sample Animal Hospital   Summary Report   Thursday, October 29, 2015
10/29/2014 - 10/29/2015

INVOICES / PRODUCTS

Non-Taxable Products Invoiced: Total Non-Taxable Products Invoiced: $
  SubTotal: $ Total Taxable Products Invoiced:
  Adjustments: $ **Total Products Invoiced: $ 1,293,402.00**
  Product Discounts: $ Tax Collected: $
  Invoice Discounts: $ Total Invoices: $
Total Non-Taxable Products Invoiced: $ Interest Charged: $
       NSF Fees Charged: $
Taxable Products Invoiced: Billing Fees Charged: $
SubTotal: Total Revenue: $
  Adjustments: $
  Product Discounts: $ Total A/R Written Off: $
  Invoice Discounts: $
Total Taxable Products Invoiced: $

ACCOUNTS RECEIVABLE

DESCRIPTION	TOTALS	0 - 30 DAYS	31 - 60 DAYS	61 - 90 DAYS	OVER 90 DAYS
Beginning Balance:	$	$	$	$	$
+ New Charges:	$				
- Payments On Account:	$				
- Credit Balance Adjustments:	$				
- Adjustments to A/R:	$				
+ NSF Expense:	$				
Ending Balance:	$	$	$	$	$
Difference:	$	$	$	$	$
Down Payments:	$				

STATISTICS

DESCRIPTION	QUANTITY	TOTAL	AVERAGE		COUNT
Client Only Invoices:		$	$	New Clients:	377
Patient Invoices:		$	$	Clients:	
Invoices:	9,520	$	$	New Patients:	
Patient Visits = Yes:		$	$	Patients:	
Patient Visits = No:		$	$		
Patients Invoiced:		$	$		

PAYMENT METHODS

DESCRIPTION	AMOUNT	DESCRIPTION	AMOUNT
Cash:	$	Check:	$
Check - NSF:	$	Gift Certificate:	$
Interac (Direct Pay):	$	Master Card:	$
Visa:	$	Visa - NSF:	$
Payments Made:	$		
Change Dispensed:	$		
Total Payments Received:	$		

Examples of drug and medications revenue

TAXES

DESCRIPTION	TAX RATE	BASE AMOUNT	COLLECTED	CALCULATED	DIFFERENCE
G.S.T - S:	5.0000 %	$	$	$	$
H.S.T (13%) - HST:	13.0000 %	$	$	$	$
Tax Totals:		$	$	$	$

PRODUCT CATEGORIES

NAME	AMOUNT	NAME	AMOUNT
Examinations and Consults	$ 68,401.86	Heartworm/Flea/Tick Medication	$ 26,481.33
Surgical Procedures	$ 30,114.90	Dispensed Pharmaceuticals	$ 16,720.11
Hospitalization and Fluid Therapy	$ 84,102.41	Pet Food and Dietary	$ 11,009.80

Page 1   Time: 11:07:32 AM

Examples of professional services revenue

Examples of food revenue

Active Clients

This section will walk you through how to find statistics on active clients in Impromed's Infinity.

If you have already set up an appropriate search definition, please skip to step nine. If you do not have a search definition set up for active clients, steps one through eight will outline how to do this.

1. Select "Setup" from the toolbar
2. Under "Communications", pick "Search Details" option
3. Within the "Mode" box, select "Create" to initiate the creation of a new search definition
4. Name your Search Definition as "12 Month Active Clients" (or similar)
5. Set up criteria according to the table below; this will define active clients as those that have had their latest visit to within one year

(	Table	Field	Operator	Table or '(Value)'	Field or value	)	And/Or
	Client	Active	=	(Value)	Yes		And
	Client	Latest Visit Date	>	(Value)	*Type in date of 12 months prior*		

6. Click the "Output Items" tab
7. Select "Client"
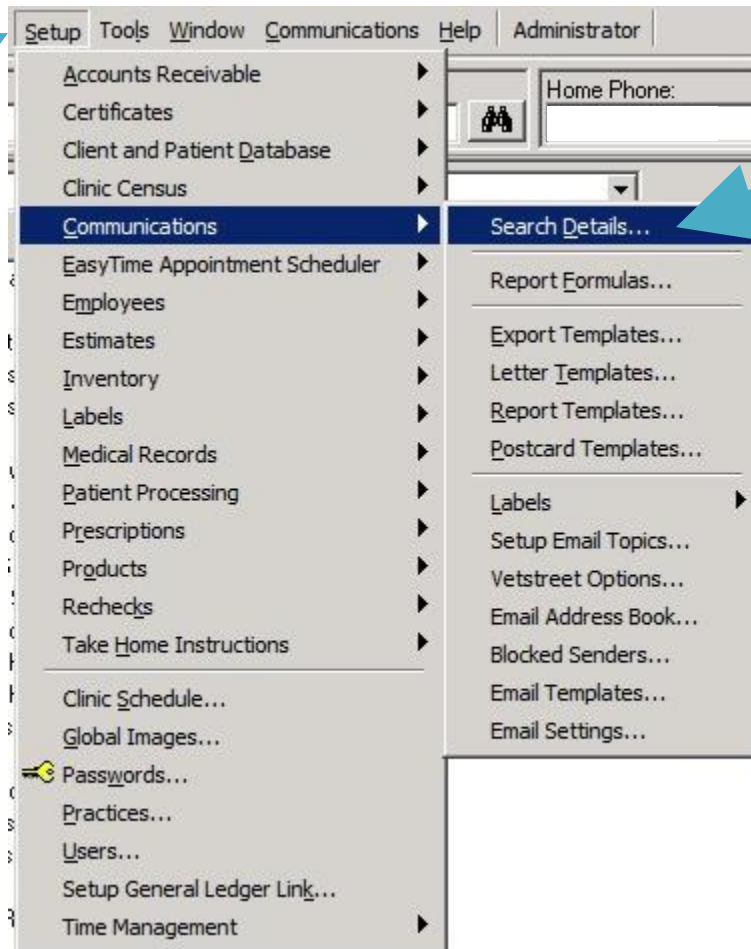8. Click "OK" to save this search definition

You have now set up a search definition. The steps below outline how to run this search now that it is set up.

9. Select "Communications" from the toolbar
10. Pick "Perform Search" option
11. Find your "Search Definition" title and highlight
12. Click "Perform Search"
13. This will generate a dialogue box title "Values for Search", where you may adjust the date range to define an active client; if it is not already, set the "Field or value" of the "Latest Visit Date" to 12 months prior, thereby defining an active client as one who has had their latest visit within one year
14. Click "OK" to perform the search

Report the number of records returned as Active clients on the Practice Owners Economic Survey

Active Clients – Steps One and Two

Step One

Step Two

Setup   Tools   Window   Communications   Help   Administrator

Home Phone:

Accounts Receivable
Certificates
Client and Patient Database
Clinic Census
Communications   Search Details...
EasyTime Appointment Scheduler   Report Formulas...
Employees
Estimates   Export Templates...
Inventory   Letter Templates...
Labels   Report Templates...
Medical Records   Postcard Templates...
Patient Processing
Prescriptions   Labels
Products   Setup Email Topics...
Rechecks   Vetstreet Options...
Take Home Instructions   Email Address Book...
                                        Blocked Senders...
Clinic Schedule...   Email Templates...
Global Images...   Email Settings...
Passwords...
Practices...
Users...
Setup General Ledger Link...
Time Management

Active Clients – Steps Three through Six

Step Four

Step Six

Step Five

Step Three

Active Clients – Steps Seven and Eight

Step Eight

Step Seven

Setup Search Definitions (Create)

Search Definition: ✓
Test Active Clients

Description:
Active Clients Test

OK
Cancel
Apply

Criteria | **Output Items** | Sort Order

Items to include in output: ✓
☑ Client
☐ Patient
☐ Reminder

Mode:
○ View
○ Edit
● Create

Copy
Delete

☑ Allow user to change values when searches using this definition are performed
☐ Allow user to update reminder counts for search results performed using this definition
☐ Prompt for compliance log information when printing or exporting a search result performed using this definition
☑ Show required information

Active Clients – Steps Nine and Ten
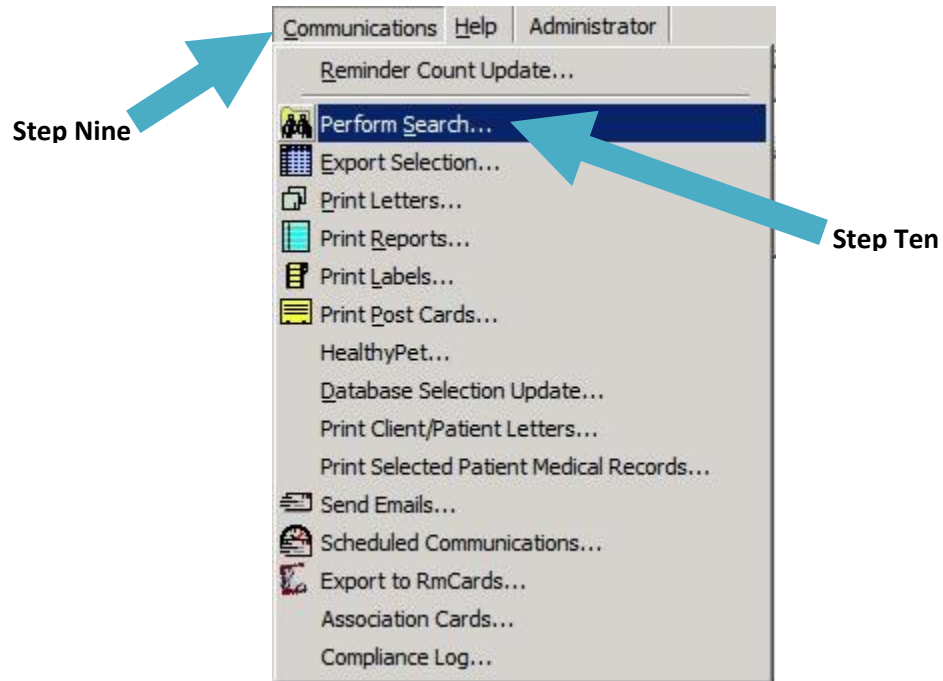
Active Clients – Steps Eleven and Twelve

Step Eleven

Step Twelve

Active Clients – Steps Thirteen and Fourteen

Active Clients – Figures to Record

Record this figure

Fees

This section will walk you through how to find your fees in Impromed's Infinity.
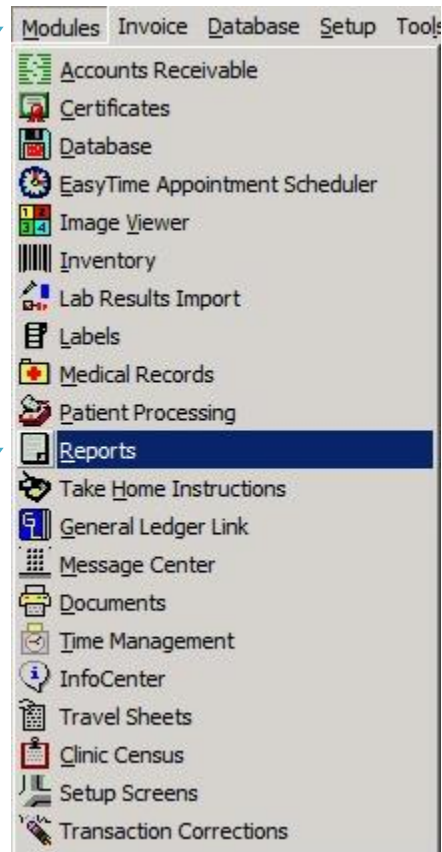
1. Select "Modules" from the toolbar
2. Pick "Reports" option
3. Expand the category "Setup Reports"
4. Expand the subcategory "Setup Products Reports"
5. Select the "Price Listing" option
6. Click "Print"
7. This will generate a dialogue box called "Price Listing" in which you select how to display the prices; under the "Print by" box, select "Categories, Product Code" to sort items by category
8. You may either print the report by clicking "OK" or may view the report on your computer screen by clicking "Preview"

Report the "Def. Price" for various procedures to the appropriate fee fields within the Practice Owners Economic Survey

Fees – Steps One and Two

Step One

Step Two

Modules Invoice Database Setup Tools

- Accounts Receivable
- Certificates
- Database
- EasyTime Appointment Scheduler
- Image Viewer
- Inventory
- Lab Results Import
- Labels
- Medical Records
- Patient Processing
- Reports
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- Setup Screens
- Transaction Corrections

Fees – Steps Three through Six

Report List Name: <None>

Print
Cancel

Setup Lists
Setup Printers
Security

Step Six

- ☐ Accounts Receivable Reports
- ☐ Census Reports
- ☐ Client/Patient Database Reports
- ☐ EasyTime Reports
- ☐ Employee Reports
- ☐ Financial Reports
- ☐ Inventory Reports
- ☐ Log Reports
- ☐ Medical Record Reports
- ☐ Product Reports
- ☐ Recheck Reports
- ☑ Setup Reports
  - ☐ Setup Census Reports
  - ☐ Setup Database Reports
  - ☐ Setup EasyTime Reports
  - ☐ Setup Employees Reports
  - ☐ Setup Inventory Reports
  - ☐ Setup Labels Reports
  - ☐ Setup Medical Records Reports
  - ☐ Setup Patient Processing Reports
  - ☐ Setup Prescriptions Reports
  - ☑ Setup Products Reports
    - ☐ Canned Estimates
    - ☐ Health Plans
    - ☑ Price Listing
    - ☐ Product and Inventory Links
    - ☐ Product Attachments By Attachment Type
    - ☐ Product Attachments By Product
    - ☐ Product Categories
    - ☐ Product Components
    - ☐ Product Details
    - ☐ Product Links
    - ☐ Product Listing
    - ☐ Product Profit Centers
    - ☐ Product Restrictions
    - ☐ Product Timers
    - ☐ Product Types
  - ☐ Setup Rechecks Reports
  - ☐ Setup Take Home Instructions Reports
  - ☐ Setup Time Management Reports
  - ☐ Users
- ☐ Time Management Reports

Step Three

Step Four

Step Five

Fees – Steps Seven and Eight

Step Eight

Step Seven

Fees – Figures to Record

PRODUCT ID	PRODUCT DESCRIPTION	DEF. PRICE (Qty = 1)	PRODUCT ID	PRODUCT DESCRIPTION	DEF. PRICE (Qty = 1)
			264	Feline Leukemia: add on (1-Year)	$ 0.00
			1615	NRHD Rabies Vaccine (Coupon)	$ 28.00

Category Name: Surgical Services (Cont.)

1652	Remove Dewclaws - Puppy	$ 34.55
1660	Dewclaw Removal - Canine (2 Limbs	$ 90.10
* 1660	Dewclaw Removal - Canine (2 Limbs	$ 239.90
1661	Dewclaw Removal - Canine (All Limbs)	$ 135.10
* 1661	Dewclaw Removal - Canine (All Limbs)	$ 284.90
1662	Abscess Drain / Flush / Suture	$ 120.45
1664	Feline Castration & Declaw	$ 166.85
1666	Surgical Pack Fee	$ 28.50
1667	Laparoscopic Ovariectomy C-Medium	$ 0.00
* 1667	Laparoscopic Ovariectomy C-Medium	$ 452.10
1668	Laparoscopic Ovariectomy C-Small (0 20)	$ 0.00
* 1668	Laparoscopic Ovariectomy C-Small (0 20)	$ 440.40
1670	Laparoscopic Ovariectomy Feline	$ 0.00
* 1670	Laparoscopic Ovariectomy Feline	$ 360.80
1700	General Surgery per 10 minutes	$ 110.70
1701	Whelping / Puppy Revitalization Fee	$ 63.80
1722	Laparoscopic Ovariectomy Feline + Declaw	$ 0.00
* 1722	Laparoscopic Ovariectomy Feline + Declaw	$ 463.65
1828	Debarking	$ 210.25
16669	Laparoscopic Ovariectomy C-Giant (> 90)	$ 0.00
* 16669	Laparoscopic Ovariectomy C-Giant (> 90)	$ 528.80

Category Name: Vaccinations-Immunizations

202	Vaccination & Physical Exam (Canine	$ 103.80
203	Vaccination & Physical Exam (Feline)	$ 103.80
204	DHP: add on (1-Month)	$ 0.00
205	DHP: add on (1-Year)	$ 0.00
206	DHP: add on (3-Year)	$ 0.00
207	Parvovirus: add on (1-Month)	$ 0.00
208	Parvovirus: add on (1-Year)	$ 0.00
209	Parvovirus: add on (2-Year)	$ 0.00
210	Parvovirus: add on (3-Year)	$ 0.00
211	Rabies (Feline): add on (1-Year)Purevax	$ 0.00
212	Rabies (Canine): add on (1-Year)	$ 0.00
213	Rabies (Canine): add on (3-Year)	$ 0.00
214	Kennel Cough (Bordetella) &Physical Exam	$ 88.25
215	Kennel Cough (Bordetella) add on	$ 41.55
216	DHP add on (2 Year)	$ 0.00
217	Lyme Vaccine & Physical Exam	$ 88.25
219	Lyme Vaccine - Add on	$ 40.20
220	Leptosporosis: add on(1-Month)	$ 0.00
222	Leptosporosis: add on (1-Year)	$ 0.00
224	Leptosporosis Booster (1-Year)	$ 40.20
260	FVRCP: add on (1-Month)	$ 0.00
261	FVRCP: add on (1-Year)	$ 0.00
262	FVRCP: add on (3-Year)	$ 0.00
263	Feline Leukemia: add on (1-Month)	$ 0.00

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