



# IntraVet Reports



## Accounting: focus on money charged & collected

### ⇒ End of Day Report

- Balance receipts at end of day - date & time range option
- Transactions show in order saved
- Invoices option shows client & patient w/ invoice amount
- Totals page list net services vs net payments
- Subtotals show breakdown including debit/credit
- Lists Cash, Check & Credit payments and refund
- Running reports will not close period
- Option to list those that were charged tax or received % discounts

### ⇒ End of Day Services

- List services for each invoice -option to print per doctor and select only specific doctors
- Sales Tax - % discounts - Payments are not listed on this report
- Date range searchable
- Good for re-entering lost data or use as permanent copy of invoices day by day
- Also helpful for reviewing what was charged out to doctors

### ⇒ Credit/Debit Adjustment

- Shows credit or debit adjustments for date period selected
- Option to pick all types or just specific ones

### ⇒ Transaction Analysis Report

- Shows clients who have charges/payments/adjustments during specified period
- Most often used to control AR
- Totals DO include sales tax and % discounts

### ⇒ Transaction Totals Report

- Often used as month end/quarterly report
- Good comparison to show changes to daily reports after the report is run & filed
- Daily totals enabled - 1 line prints for each day w/ activity. Separates day totals out by invoices, % discount, tax, returns, debit/credit adjustments, services, cash, checks, credit card, refunds and payments

### ⇒ Accounts Receivable Report

- Clients w/ outstanding balances
- Totals page reflects total aged accounts receivable for clients chosen
- O Print one line for each client to break down each person's balance
- Option to include/exclude specific classifications to better reflect balances to be paid

### ⇒ Past Due Accounts

- Show's Accts Receivable w/ no payments since specified date
- Breakdown of what clients owe based on 30, 60 or 90 days past due, with no payment since the specified date.
- Options to include/exclude clients by classification, the totals page only represents those clients who qualify and not necessarily all who owe money.



# IntraVet Reports

- ⇒ List of Clients w/ Credit Balances
  - Shows clients & amount of credit on account
  - Usually returns/deposits/overpayments
- ⇒ Accounts Receivable by Doctors
  - Valuable tool if you are paying Doctors based on the monies they collect or have some Doctors w/ Accts Receivable issues
  - Undistributed shows totals not associated w/ invoice saved through IntraVet ie. credits/debits/billing fees/interest/conversion data from old billing
- ⇒ Service Payments Comparison for Doctors
  - Real Time Report can only be generated as of the current date, therefore it is a difficult report to use to pay Doctors
  - Shows services provided & Payments collected by each Doctor
  - Does NOT include sales tax or discounts
- ⇒ Payment Distribution Report by Doctors
  - Most frequently used to pay Doctors based on the money they have collected
  - Ran by payment date by doctor & can be run in detail or as summary w/ totals only
  - Only shows payments from an invoice, tax is included & discounts taken away
- ⇒ Management Control Report
  - Comes from Invoice Transaction file and tells about services comparing this period to last year's same period & this YTD comparing last year's YTD
  - Calculates, reviews & tracks activity of Accts Receivable w/in a date range
- ⇒ Sales Tax Report
  - Lists total sales, exempt sales, net taxable sales & the tax collected for date range specified
- ⇒ Merchant Service Audit Report
  - List of clients & credit transactions
  - Totals based by credit card
- ⇒ Discount Report
  - % Discounts given for clients or on codes within a selected period

## Statements: For billing

- ⇒ Statements
  - Print statements for clients w/ balances, calculates billing & monthly interest %'s and apply charges

## Productivity: looks at services rendered & goods sold, does not reflect money collected

- ⇒ Client Patient Statistics
  - View number of clients & patients in system at present time w/ breakdown of number and % of species



# IntraVet Reports

- ⇒ Productivity by Client
  - Shows a list of clients who have been invoiced for selected codes within a selected date range
- ⇒ Monthly Productivity/Species Selective
  - Shows productivity of all or specific species
  - Shows how many seen & dollar amount of services including monthly % for whole year
- ⇒ Monthly Productivity Comparison Last 3 Years
  - Real Time report shows production compared to the previous 3 years w/ increases and decreases noted month to month
  - Provides up-to-the-minute monthly totals for the current year and gives a comparison to the previous 2 years.
- ⇒ Departmental Productivity
  - Run monthly to monitor services & products sold during the period
  - Can be used for business forecasting of future sales and ordering
  - Often run monthly to monitor services & products sold during the period
- ⇒ Doctors Productivity
  - Separates Doctor's Productivity by department totals
  - Option to run itemized or totaled by department
  - Must be run per each Doctor
- ⇒ Doctors Productivity by Referral
  - Details referral business & revenue generated by referring doctor/clinic
- ⇒ Returns by Department
  - All product returns by Doctor Code within the specified date range,
  - Results for a single department or for all departments, depending upon which option is chosen.
- ⇒ Departmental & Doctor's Fee Exception Reports
  - Shows items sold charges w/ exceptions (prices overwritten during invoicing)
- ⇒ Doctor's Productivity Analysis
  - % of business and Patients seen
  - May inflate total patients seen because of 2 Dr's on same invoice
  - Does not indicate money collected
- ⇒ Referring Clinics/Doctor Reports
  - Details referral business & revenue generated by referring doctor/clinic
- ⇒ Zip/Postal Code Analysis Report
  - Lists top zip codes ranking them by # of clients
- ⇒ Client Retention by Doctor
  - Show the number of repeat visits a specific doctor has received for a given time period
  - Clients that doctor had initially seen within a different time period or possibly the same time period
  - Option to calculate the Clinic retention rate as whole



# IntraVet Reports

- ⇒ New Clients and Patients by Doctor
  - Calculates the total number of new clients and the total number of new patients by Doctor
- ⇒ Clinic Summary
  - Provides an overview of key productivity statistics for a given period on a single report
  - Easily compare clinic productivity for a selected time period to a previous period, alongside the current one.
- ⇒ Hot Items
  - Shows a list of your "hot" items based on the frequency the code is invoiced
  - Does not take into consideration any return transactions, percentage discounts or sales tax.
  - Does include dispensing fees and minimum pricing in the results.

## Inventory: reports for tracking inventory

- ⇒ YTD Inventory Totals Report
  - Shows Total purchases last year & total inventory amount (qty on hand X current item cost)
- ⇒ Inventory Detailed Report
  - Analyze Inventory - date range searchable
  - Lists Purchases: Dollar amount & Quantity (to date), Sales: Quantity (to date), On Hand: Amount & Quantity, Cost per item, Mark up %, Price per item
- ⇒ Inventory Reorder Report
  - Shows inventory below reorder level and/or all items regardless of stock level
  - Option to run by Vendor and/or Department
- ⇒ Inventory On Hand
  - Overview of inventory items, each displayed with setup details once found in Code Setup
- ⇒ Controlled Items Report
  - Prints list of Controlled Drugs dispensed during specific period
  - Shows client/pet/amount/invoice number
- ⇒ Purchase Order Report
  - Shows pending portion of orders w/in date ranges
- ⇒ Purchase Order History
  - View past purchase orders
  - Choose a single purchase order or select a range of purchase orders by #
- ⇒ Purchase History (Browse by Item/Vendor) Reports
  - Purchase history by item or vendor w/ search feature
- ⇒ Inventory Transfer Report
  - Shows items that were transferred out
  - List total quantity and cost
  - Date range searchable with option to select a specific item



- ⇒ Inventory Lot Expiration
  - List items set to expire based on date range searched
  - Option to select by department
  
- ⇒ Inventory Audit Report
  - Audit a selected inventory item starting from a specific date to present day
  - Option to show details
  - Lists - Items invoiced, returned, received, adjusted, depleted, used in house, transferred, items on open invoices, and items sold as linked items
  - Beginning on hand qty based on date selected and current on hand quantity are both listed
  
- ⇒ Inventory by Open Invoice
  - List inventory items outstanding on temporary saved invoices
  
- ⇒ Inventory In House Usage
  - Shows items depleted through In House Use option
  - Date range searchable with options to group by department
  - Can be run for all departments or a selected department

**Client Reports:** organize, calculate & track information about clients & their activities.

- ⇒ Client Referral Reports
  - Business generated by client referral
  
- ⇒ Client Visit Report
  - How many clients have come to the office including repeat
  
- ⇒ Clients by Revenue Report
  - Allows you to print out a list of your top clients (up to 9999)
  - This is not a mailing list, to get a list of clients for mailing, use the client's YTD service total as the cutoff figure in the Recall Generator search
  
- ⇒ Clients w/ No Activity Since
  - Displays inactive clients since a specified date
  
- ⇒ Clients w/ Missing Data
  - Maintenance report helps to find client files that are missing data  
ie. name, address, zip code, etc
  
- ⇒ Client Lists
  - Prints list of clients in alpha or account order
  - Allows you to select phone list only or name, address, phone & account number
  - Can be filed away as a reference



# IntraVet Reports

**Patient Reports:** organize, calculate & track information about patients & their activities

⇒ Vaccinations List

- Vaccinations & Rabies Vaccinations can be printed on this report
- Information includes: client name, address, phone number, patient name, species, breed, sex, color, age, vaccination done, date of vaccination, & tag ID if applicable
- Choose the order of print: Tag ID - Client Last Name - Account Number

⇒ Rabies Vaccination List

- Specific Report for codes marked as Rabies Vaccination in code setup
- Information includes: client name, address, phone number, patient name, species, breed, sex, color, age, vaccination done, date of vaccination, and applicable tag ID number, serum manufacturer and lot number

⇒ Batch Print Rabies Certificates

- Allows you to print all of the rabies certificates for a specified date range
- Only vaccinations that were originally invoiced & PRINTED through IntraVet will be eligible for this feature

⇒ Tag ID List

- This is a listing of all ID tags assigned to the patients in your system
- List shows last ID tag issued to pet
- Patient information setup shows tag ID

⇒ Visit Service List

- Lists all the items still outstanding in Visit Services
- Report lists type of Visit Service in addition to client/patient/doctor & date

⇒ Estimate List

- List clients and patients with estimates on file
- Does not give details of the estimate

⇒ Patients w/ No Activity Since

- Lists patients that have had no invoices entered since a particular date
- Includes client name, account number, & last date of visit

⇒ Patients w/ No Reminders

- List patients who have no reminders based on a selected entry date
- Gives total patients on file vs total active patients

⇒ Patients w/ Missing Data

- Finds patient files that have missing data ie. species, sex, breed, etc

⇒ View Referral Letter

- View a list of referral letters saved
- Option to view specific letters
- Choose how to sort list -By client/patient, referring doctor or by description of letter



# IntraVet Reports

## ⇒ Diagnosis Report

- Gather a list of diagnosed patients based on a date range
- Include all diagnosis or only specific ones
- Option to add in those entered through assessment in SOAP

**Appointment Reports:** Review numbers regarding appointments scheduled -should be run each month

## ⇒ Last Month's Activities

- Option to print by a specific appointment calendar group or to print all groups.
- Top 10 busiest hours shown bold

## ⇒ Last Month's Appointment Totals

- Statistics of appointments per day by doctor from the first day of last month to the last day.
- Totals per doctor listed below & includes a graphical view

## ⇒ Appointment Type Report

- Statistics based on type selected for appointment
- Options include all doctor or specific doctor, all groups or specific group and all appointment types or selected appointment types
- Only searches past 30 days

**Boarding Reports:** Useful in managing your kennel & reporting productivity

## ⇒ Boarding Arrivals Reports

- Report details pets due to check in during a specified date range
- Includes acct number, client name, check in & check out date and time, pet, species, breed, reservation number and cage type
- Can be used as checklist or to project number of pets coming in on specified date

## ⇒ Boarding Patients

- Lists the checked in (not yet checked out) pets as of a given date
- Reports the occupancy % rate and details appear in alphabetical order

## ⇒ Departures

- Lists who is checking out within a specified date range
- Reservation must be checked in, appears in alphabetical order

## ⇒ No Shows

- Lists the clients who did not check in for their scheduled reservation
- Can be run for any date or date range

## ⇒ Scheduled Activities

- Creates a "to do" list of scheduled activities in account order

## ⇒ Boarding Productivity

- Provides an overall analysis of boarding revenues & usage
- Includes: cage description, qty/capacity, reserve, occupancy, no show, reserve %, occupancy %, and no show %





# IntraVet Reports

## ⇒ Boarding List

- A list of boarding pets for a specific day -includes those checking in/out and current boarders

## Split Invoicing Reports: Used for setting & examining partnerships (\*Mainly Equine practices)

### ⇒ Partnership Setup by Patient

- List the partners/owners for selected patients in a caretaker account & the percentage that each owns

### ⇒ Partnership Setup by Partner

- List the patients for selected partner, acct number, and name of caregiver for each animal & the percentage owned

### ⇒ Invoice Splitting Details (by Date)

- Selectable by date and branch, lists details for all split invoices in specified date range.
- Caregiver listed w/ patient, date, invoice number w/ amount, amount of partner responsibility & percentage

## Utility Reports: deletions list

### ⇒ Deletions List

- List of all deleted clients, patients, invoices, transactions & aborted invoices
- Lets you see when and what was deleted and operator ID
- Date range is for date deleted, not date entered
- Aborted invoices are invoices that have been started but then canceled

### ⇒ Archived Patients Report

- Give you access to deleted patients that have been saved to the inactive file.
- The history can be printed individually and includes patient name, account number, information describing the animal & history lines as they were at the time of the deletion
- This information is for reporting only & CANNOT be reactivated or edited
- Codes for deletion must be marked to put patient in inactive file or when deleting clients you must place a check mark in "keep data in the inactive file" box, otherwise patient will be deleted

### ⇒ Estimate Templates List

- A list of estimate templates
- Option to show details that make up each template

## Print Batch Reports: designed to save time by setting up report printing for later time

Select the option to Print Later after setting report parameters. When your ready to print, choose the print batch report. You have an option to delete reports if desired

## Typical Reports

Every clinic looks at different information to determine if they are reaching their practice management goals. The following is a list of typical reports a clinic might run. Many of these reports can be run with different dates so that you can compare apples to apples in the same format but for different time periods. You should select the reports based on what pertains to your clinic.

### Daily Reports

#### 1. End of Day Report

- a. Date Range searchable
- b. List of payments and invoices
- c. Totals page showing breakdown of service vs payments ( including debit/credit, transaction types and number of client)
- d. Individual payment details
- e. Tax and percentage discounts considered

#### 2. End of Day Services

- a. Date range searchable (option to sort by dr)
- b. Sales Tax -% discount - payments not listed on this report
- c. A audit trail listing details of each invoice for the day

### Monthly Reports

#### 1. Transactions Totals

- a. Date range searchable
- b. Often used as month end/quarterly report
- c. Daily totals enabled - 1 line prints for each day w/ activity
- d. Good comparison to show changes to daily reports after the report is run & filed

#### 2. Transaction Analysis

- a. Date range searchable
- b. Shows opening balance of client, charges, payments and adjustments to see how account receivables have changed
- c. Most often used to control AR - shows clients with services not paid
- d. Totals DO include sales tax and discounts

#### 3. Accounts Receivable (may want to run Past Due Accounts)

- a. Clients w/ outstanding balances
- b. Totals page reflects total aged accounts receivable for clients chosen
- c. O Print one line for each client to break down each person's balance
- d. Exclude collections/bankruptcy to better reflect balances to be paid

#### 4. Management Control

- a. Comes from Invoice Transaction file and tells about services comparing this period to last year's same period & this YTD comparing last year's YTD
- b. Calculates, reviews & tracks activity of Accts Receivable w/in a date range
- c. Can calculate number and average of visits and invoice

#### 5. YTD Inventory Detailed Report

- a. Lists Purchases: Dollar amount & Quantity (to date), Sales: Quantity (to date), On Hand: Amount & Quantity, Cost per item, Mark up %, Price per item

6. Departmental Productivity
  - a. Often run monthly to monitor services & products sold during the period
  - b. Can be run by dept or more indepth showing details
7. Doctor Productivity and/or Doctor Productivity Analysis
  - a. Dr. Prod report shows: Value of work done per doctor
  - b. Dr. Prod Analysis determines what the average \$ amount per patient seen by a doctor would be. Some practices will base compensation or bonuses from the numbers generated from this report.
  - c. Productivity analysis can also show how much revenue was generated (not collected) per doctor.
8. Client Visit Report
  - a. Number of client visits including repeats
  - b. # of new clients and pets
9. Boarding Productivity (if applicable)
  - a. An overall analysis of boarding revenues and usage.
  - b. Includes: cage description, qty/capacity, reserve, occupancy, no show, reserve %, occupancy %, and no show %
10. Controlled Items
  - a. Prints list of Controlled Drugs dispensed during specific period
  - b. Shows client/pet/amount/invoice number/date/drug
11. Sales Tax
  - a. Lists total sales, exempt sales, net taxable sales & the tax collected for date range specified

## Quarterly/Yearly Reports- (also use monthly reports selections with larger date range)

1. Inventory Detailed Report
  - a. Lists Purchases: Dollar amount & Quantity (to date), Sales: Quantity (to date), On Hand: Amount & Quantity, Cost per item, Mark up %, Price per item
2. YTD Inventory Totals Report
  - a. Shows Total purchases last year & total inventory amount (qty on hand X current item cost)
3. Monthly Productivity -Last 3 year comparison
  - a. Reflect up-to-the-minute monthly totals for the current year and give a comparison to the previous 2 years.
4. Clinic Summary Report
  - a. Provides an overview of key productivity statistics for a given period on a single report
  - b. Easily compare clinic productivity for a selected time period to a previous period, alongside the current one.
5. Client Retention by Doctor
  - a. Show the number of repeat visits a specific doctor has received for a given time period
  - b. Clients that doctor had initially seen within a different time period or possibly the same time period
  - c. Option to calculate the Clinic retention rate as whole