Creating Your IntraVet Practice Profile

Create your own practice profile with the information you want to review by using IntraVet's extensive reporting system. You can then use this information as a tool in the management of your practice. If you create a profile every year, you'll be able to compare apples to apples and oranges to oranges.

Fill in a few numbers, print a few reports – gather them all together in a nicely organized binder, and you've got yourself a practice profile.

We've created a comprehensive fill in the blank document with instructions on where to pull the information. This document combined with some printed reports and graphs from IntraVet can give you an overall view of your practice.

Notes:

- To gather meaningful data it is advised to run all the reports for the **exact** same time period. A larger date range (ie. a year period vs a month) will also give more meaningful numbers. With that said, there may be reports that you want to print and review monthly.
- Multiple data entries may be pulled from the same report and therefore that report will only need to be printed once.
- Reports may be displayed rather than printed to pull specific numbers (ie. Number of Clients)
- Your clinic may not using boarding or referral reports or may not be concerned with specific report numbers. You can decide which reports are relevant to your clinic and print only those specific reports.

Client Productivity

Fill in the Following Numbers:

<u>Number of Clients:</u>
To determine the number of clients in the system: Reports > Productivity Reports > Client & Patient Statistics > Display or Print Or Reports > Client Reports > Client Visits Reports > Display or Print

<u>Number of New Clients:</u>
To find Number of New Clients: Reports > Client Reports > Client Visits Reports > Display or Print. This report is usually ran from the beginning of the year to the end of the year (or to the present date)

<u>Total Client Visits:</u>
To find Total Client Visits: Reports > Client Reports > Client Visits Reports > Display or Print. This report is usually run from the beginning of the year to the end of the year (or through the present date).

<u>Clients with at least 1 Visit:</u>
To find Client with at least 1 Visit: Reports > Client Reports > Client Visits Reports > Display or Print. This report is usually run from the beginning of the year to the end of the year (or through the present date).

Average Number of Client Visits:
Utilize the Client Visit report: Reports > Client Reports > Client Visit Report > Display or Print. Use the following Formula to determine the average number of client visits: (Client Visits per year / Active Clients= Average number of Client Visits)

Average Invoice Per Client:
To locate the Avg Invoice $ per Client: Reports > Accounting Reports > Management Control Report > Check the box to calculate Avg Invoice & Visit > The *Avg Visit[$]* amount is your Avg invoice/per client. This report is usually run for a period of a year (or through the present date).

Print the Following Reports:

Client Retention by Doctor **:**
Located under Reports > Productivity Reports > Client Retention by Doctor
This report shows the number of repeat visits a specific doctor has received for a given time period. In addition, you have the option to calculate the retention rate of the clinic as a whole. There are two date ranges used in the report. The first is to determine the time range when the "initial" visit would have been performed. This initial visit may not necessarily be the first visit for this client with this doctor. The report is looking to see if a client, whether old or new, has had at least one visit for that specific doctor within the initial visit date range. If that client has had at least one visit, they will be counted once as seen by that doctor. The second date is necessary to allow you the ability to determine a suitable "time frame" in which to consider a client retained. Each clinic can and *will* have its own idea of how long after an "initial" visit the client should return for another visit with that doctor before being counted as a retained client.

Number of Initial Visits = Number of clients with a visit in the initial visit date range. The client may be an existing or new client.

Number of Repeat Visits = Number of clients that returned for a visit with a specific doctor within the repeat visit date range.

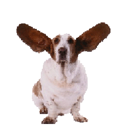
Retention Percentage = the percentage of retention

NOTE: There is a major difference between the doctor's retention calculations and the clinic retention calculations. For the doctors, a client can be counted once *per each doctor*. For the clinic/branch the client can only be counted once… period.

Determining a visit is as simple as checking to see if that doctor has shown up on an invoice for that client. It doesn't matter if they are the original invoice doctor or if they were recorded only on one line of the invoice, it counts as a visit. It is entirely possible for a client to be counted against more than one doctor for the date ranges selected. If a client sees two doctors on one invoice, both doctors will get credit for that client as a visit. This is important since the numbers for each doctor can not be totaled or averaged to make a "clinic retention" percentage.

You will want to adjust the date ranges based on what type of information you are looking for. For instance, if you want to calculate how many people returned from one year to the next you can run the report for 2 sequential years (ie. the initial visit date range for 2004 vs the repeat visit date range of 2005. This will give you numbers and percentages of how many clients returned for 2005). Alternatively, you may want to see how many clients returned for a second visit within a year. For this report you will want to run the same date range for the initial visit and for the return visit. You have the option to calculate the retention rate of the clinic as a whole and the choice to print each doctor on a separate page.

New Clients and Patients by Doctor:
Located under Reports > Productivity Reports > Client Retention by Doctor
This report calculates the total number of new clients and the total number of new patients by Doctor. A client is considered a new client if their entry date in IntraVet is between the dates selected for the report,



and if they have been invoiced by a doctor within the same date range. The same rules apply for new patients. Check the box if a separate page for each doctor is desired.

Zip Code Analysis:
Located under Reports > Productivity Reports > Zip Code Analysis.
This report will show you which zip codes are your top producers. Each zip code shows the number of clients and patients and the total services provided to that zip code area during the date range specified. Productivity is calculated on the invoiced amounts and does not reflect money collected. Percentages of the totals are also shown for each zip/postal code. Although most clinics like to examine their top 10 zip codes, you can enter in the desired amount that you would like to review.

List of Clients By Revenue:
Located under Reports > Client Reports > Clients by Revenue.
This report ranks your clients by the amount of money they have spent at your facility. You can choose to print the top # of clients up to 9999. Most clinics like to examine the top 50 to 100 clients. Productivity shows the amount invoiced and does not include money collected, sales tax or percentage discounts.

Client Referral Reports:
Reports > Client Reports > Client Referral Report.
The Client Referral Report compiles the business generated by each referral source. The referral information must be in the client setup at the time of the invoice for it to be included in the services amount. You will see a subtotal for each referral code. Use this report to assess advertising expenditures and marketing focus.

Patient Productivity

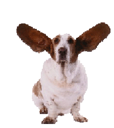
Fill in the Following Numbers:

Number of Patients:
To determine the number of patients in the system: Reports > Productivity Reports > Client & Patient Statistics > Display or Print

Number of New Patients:
To find Number of New Patients: Reports > Client Reports > Client Visits Reports > Display or Print. This report is usually ran from the beginning of the year to the end of the year (or to the present date)

Total Patient Visits:
To find Total Patient Visits: Reports > Accounting Reports > Management Control Report > Check the box to calculate Avg Invoice & Visit > The Number of Invoices are = to the number of patient visits. This report is usually run from the beginning of the year to the end of the year (or through the present date).

Average Invoice per Patient:
To find Total Patient Visits: Reports > Accounting Reports > Management Control Report > Check the box to calculate Avg Invoice & Visit > The *Average Invoice [$]* is the Avg invoice per patient. This report is usually run from the beginning of the year to the end of the year (or through the present date).



Print the Following Reports:

Client and Patient Statistics:
To get a clearer picture of the types of patients seen go to Reports > Productivity Reports > Client and Patient Statistics > Print. If you are interested in the specific breed types, check the box to select individual breeds. This will lengthen the report but will not change the contents of the associated graph.

Monthly Productivity [Species Selective]:
Located at Reports > Productivity Reports > Monthly Productivity [Species Selective] > Print. Choose the desired year for a monthly evaluation as to how many patients were seen and how many dollars of services were provided at that time. Included are monthly percentages of those totals for the whole year. Services do not include tax and discounts. Visit and service dollar amount graphs will print out.

Reminder Compliance Report:
Located under Reports > Compliance Reports > Reminder Compliance Report. This report will show how many reminders were due for a specific date range, how many were satisfied and the overall percentage of satisfaction. It will include inactive (as they may have complied or not complied during that date range) pets and those set up not to receive reminders.

Reminder Compliance by Recall Report:
Located under Reports > Compliance Reports > Reminder Compliance by Recall Report. This report looks at reminders as a whole to measure our overall reminder efficiency. The breakdown lists compliance vs. non-compliance and presents information about why the reminders may or may not have been satisfied.

There are specific factors that can affect the numbers reported on this report. If a patient shows up on the list after running a "Real" reminder search, IntraVet marks that a reminder was sent in the patient record. If you choose to exclude or include only specific codes in your search or limit the search by recall number, reminders for that search period will not be pulled into the search and will be listed as a "no reminder sent". Other factors that could affect the numbers are excluding clients with future appointments or deleting clients off the reminder search list. Because they appeared in the original search list, IntraVet would mark the patient record as being sent but in reality a card would not have been printed for delivery.

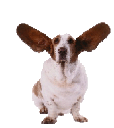
NOTE: Recently converted data may show inflated numbers for manually cleared reminders. This is due to how reminders are converted.

Reminder Productivity Report
Located under Reports > Compliance Reports > Reminder Productivity Report. This report will show productivity of reminders including revenue generated from complied reminders versus overall total revenue. The report presents these numbers either in summary, listing a total by department or more detailed by itemizing each code under the department. Only those codes and/or departments that have reminders will be displayed.

What the numbers mean:

- Comp # - The number of reminders that the code satisfied.
- Comp Revenue - The revenue generated from the reminders created off of that code.
- Total # -The number of times that code was given during the selected time period. It is the same as looking at the productivity for that specific code.
- Total Revenue - The overall total amount generated from the code during the time period, regardless of whether there were reminders.
- Compliance % - The overall percentage that had reminders on the code.

Boarding Productivity Report:
Reports > Boarding Reports > Boarding Productivity Report. The Boarding Productivity Report provides an overall analysis of boarding revenues and usage. This report is organized by Location, then Group, then Cage type. For each cage type it shows:



- Cage Description: Indicates the type of cages you have in your facility. For example, Large Run.
- Qty/Capacity: Total quantity of each cage type and cage capacity (number of pets per cage).
- Reserve: 1st column: Total number of days reserved for the selected time period. For example, if there are 10 reservations, each one made for 5 days, then your total number of reserved days is 50 (5 days x 10 reservations). 2nd column: number of actual reservations booked. Using the example given, the actual reservation number quantity would be 10. 3rd column: Reserve %: Percent of cages reserved for that time period.
- Occupancy: 1st column: Total number of days occupied for the selected time period. Using the previous example, if 3 of the 10 reservations check-in, the Occupancy number is 15 (5 days x 3 reservations). 2nd column: number of reservations fulfilled. Using the previous example, the total for reservations fulfilled is 3 reservations. 3rd column: Occupancy %: Percent of cages occupied for that time period.
- No Show: 1st column: number of days that clients did not show up for reservations. Using the previous example, if 2 reservations (of 5 days each) are unfulfilled, then your number of No Shows is 10 days (5 days x 2 No Show Reservations). 2nd column: number of reservations that clients did not show up for. Using the above example, there were 2 reservations that were unfulfilled. 3rd column: No Show %: Percent of reservations unfulfilled for that time period.

Reviewing the Numbers

Now that you have printed your client productivity reports, review them! What are the numbers telling you? Do you find that you have had large increases in new clients or patients but a low retention rate? Or do you have long time clients with little growth? What are the types of animals that make up your practice? Mostly Dogs and Cats? Have you noticed an increase in exotics over the last few years? What about your reminding efforts? Are clients responding to your reminders? How well is your boarding serving you? Are you continually booked, is it seasonal, or do people rarely use you for boarding?

Increase Productivity

Market Yourself to New Clients:

- New home developments or rental properties.
- Get involved in community projects to meet potential clients.
- *Ask the Vet* column.
- *S*egment on a talk radio show
- Get your name out there!

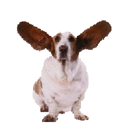
Strengthen Existing relationships

- Involve clients in your community projects
- Great service

Yearly newsletters, expanded hours, extra services, creating a web page…all these things are going to attract and keep clients.

Types of Animals served:

- Changes in types of animals served
- Address changes: Education, services, market to specific clientele
- Utilize pet stores & clubs
- Scale back animals that are decreasing
- Think about why changes are occurring



Reminders:

- Are clients complying with your requests to return?
- Make your reminders stand out by sending out funny or cute postcards or adjusting the text so it doesn't seem so much like a form letter.
- Start calling clients instead of sending out that 3rd postcard.
- Emailing reminders or using a service to post them online?
- Increase the type of reminders you send.
- Post signage outside your clinic

A simple phone call to remind someone about regular blood work for their pet or a snippet in a newsletter about services that you offer all work to remind someone to come in.

Boarding:
Always booked, rarely booked, busy on weekends?

- Offer boarding specials for the weekdays
- Doggie Daycare through the week at a reasonable price
- Once a week "classes" that clients can bring their dogs in to board for the day and your staff works with the pet or just offers fun things to do in the day so the pets aren't bored at home everyday while their owner is at work.
- Think about adding additional space for boarding or offering upgrades.
- Update your facility

Staff Involvement:

- Make staff a part of your success
- Ask them what you can do better or what clients want
- Suggestion box
- Reward efforts
- Remind them increased profits and services eventually trickles down to their pockets

Doctor Productivity

Fill in the Following Numbers:

(Note: These reports can be printed, but it makes it more difficult to do an overall comparison between doctors)

Payment Distribution Report by Doctors:
Located under Reports > Accounting Reports > Payment Distribution by Doctor. This report shows the doctors' individual payments within the selected date range. The report shows only money collected within the selected period, and applies the figures to the invoices that they pay (whether these invoices were before or after the period of the report). If an invoice has more than one doctor involved, the payment will be split according to the percentage of the invoice for each doctor.

Doctor Productivity Report:
Located under Reports > Productivity Reports > Doctor Productivity Report. Ideally you will want to leave the department field blank so that you can pull numbers from all the departments. You must also specify a doctor when running this report and therefore will have to run this report for each doctor. If you check the box to itemize, each department will list the individual codes associated with that department. This report calculates departmental totals or detailed itemized departmental totals based on the amount invoiced during the specified date range (usually one year or year to date). Productivity (sales) shows only the amount invoiced and does not reflect money collected. Services do not include tax or show percentage discounts.

Doctor Productivity by Referral:
Located under Reports > Productivity Reports > Doctor Productivity by Referral. This report will give you the doctor's productivity based on referrals. The report will sort with each doctor but let you make additional choice on how to sort within each doctor section. Select all your doctors or specific ones for viewing.

Returns by Doctor:
Located under Reports > Productivity Reports > Returns by Doctor. You must also specify a doctor when running this report and therefore will have to run this report for each doctor. If you check the box to itemize, each department will list the individual codes associated with that department. This report will show from which departments and what percentages of the returns are associated with each doctor.

Fee Exception sorted by Doctor:
Located under Reports > Productivity Reports > Doctor's Fee Exception. The Doctor's Fee Exception Report will list information regarding charges that were more than or less than the default price at the time of service. You must specify a doctor when running this report and therefore will have to run this report for each doctor. If you check the box to itemize, each department will list the individual codes associated with that department.

Doctor's Productivity Analysis:
Located under Reports > Productivity Reports > Doctor's Productivity Analysis. The Doctor's Productivity Analysis Report shows the number of patients seen by each doctor in the chosen period and the percentage of the total seen, the revenue generated by the invoices and the percentage of the revenue, and the average revenue per invoice. Productivity (revenue generated) is only the amount charged and does not indicate money collected. Services do not consider tax and percentage discounts.

Print the Following Reports:

Accounts Receivable by Doctor:
Located under Reports > Accounting Reports > Accounts Receivable by Doctor. You can choose which date to calculate the report as and decide whether to create a summary report showing doctor totals only or list actual client balances by client name or doctor. This aged Accounts Receivable report breaks down the outstanding balances by doctor

Service Payments Comparison for Doctors
Located under Reports > Accounting Reports > Service Payments Comparison for Doctors. This is a *Real Time* Report and can only be generated as of the current date. The report shows services provided & Payments collected by each Doctor but does NOT include sales tax or discounts

Financial Productivity

Print the Following Reports:

Transaction Totals:
Located under Reports > Accounting Reports > Transaction Totals. This report will give you a totals page similar to the one on End of Day transactions. In addition to the summary page, you can select to review transaction information regarding each day. If daily totals is selected each page will print approx. 50 days. If a period of a year is selected, the report could reach up to 8 pages. If you want more detailed information for your totals page, run the End of Day Transaction Report the same period selecting ONLY the *Totals page*.

Clinic Summary Report:
Located under Reports > Productivity Reports > Clinic Summary Report. This report will make comparisons for periods based on date selections. Review net and average invoice amounts in addition

to credits, debits, returns and refunds. View number of invoices and clients seen, plus how many new clients and patients were entered.

Management Control:
Located under Reports > Accounting Reports > Management Control Report. Use this report to calculate, review, and track activity of the Accounts Receivable within a date range and compare it to year-to-date totals. This report compares current year and previous year for that date range and year-to-date totals. The report is calculated for four different periods, the current period (the date range you have specified), current year-to-date (calendar year), last year same period, and last year year-to-date.

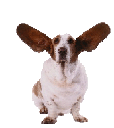
- *Beginning Balances*: This indicates the balances added from a former system.
- *Services/Payments*: Services/Payments indicates the outstanding net balances on the beginning date of the report.
- *Beginning A/R*: This is the amount of money outstanding as of the first date of the report. It is a total of the Beginning Balances and Services/Payments for each period.
- *Services*: The services are the total of invoices, debit, and credit adjustments for the period selected.
- *Services (Total)*: This row has a calculated number comprised of beginning balance adjustments during the period added to the services for the same period.
- *Payments*: The payment row is subtracted from the previous lines to give a total ending Accounts Receivable. Payments are the money collected as Cash, Check, or Credit Card.
- *Ending A/R*: The amounts reflected in this row are the total of the beginning A/R, added to the Services, with the payments subtracted, giving a total A/R for each of the 4 periods.

You have the option to calculate average invoice & visit.

- Number of Visits: Each client's visit is counted as one visit per day regardless of the number of invoices that have been generated for that client during the day.
- Average Visit: Each client's charges per day are averaged to give you an average client visit for the specified period. This is a dollar amount.
- Number of Invoices: Each invoice saved permanently counts as an invoice.
- Average Invoice: If you usually do only one invoice per patient per day, this can be an average patient visit. If an animal has more than one invoice in a given day, the average will be per invoice not per patient.

Accounts Receivable:
Located under Reports > Accounting Reports > Accounts Receivable Report. This report shows past due balances and can be printed in summary format, showing only the dollar amount due or with more detail, giving an actually list of clients with their aged balances.

Sales Tax:
Located under Reports > Account Reports > Sales Tax Report. The Sales Tax Report lists the total sales, exempt sales, net taxable sales and the tax collected for a selected date range.



Products and Services

Print the Following Reports:

Departmental Productivity
Located under Reports > Productivity Reports > Departmental Productivity. The Departmental Productivity Report shows productivity fore each department. This report shows quantity sold, amount charged, and % of total sales for the selected date or range of dates. It does NOT show any information about money collected. This report can be run to show department totals only or itemized to show the productivity of each code.

Returns:
Located under Reports > Productivity Reports > Returns by Department. This report will generate a list of departments and what percentages of the returns are associated with that department. If you check the box to itemize, each department will list the individual codes within each department.

Fee Exceptions:
Located under Reports > Productivity Reports > Departmental Fee Exception. This report will list information regarding charges that were more than or less than the default price at the time of service. You can choose to show only the totals by department or itemize and list the details of each code.

Referrals:
Located under Reports > Productivity Reports > Referrals by Clinic and/or Referrals by Doctor. These two reports show the number of patients referred by other clinics and the amount of revenue generated by those visits. Productivity shows only the amount invoiced and does not reflect money collected. Information is gathered from the referral doctor (and their associated clinic) listed in the patient setup.

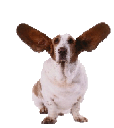
Inventory:
There are 2 key reports regarding inventory, the YTD Inventory totals and the Inventory Details Report.

YTD Totals - Located under reports > Inventory > YTD Inventory Totals Report. This report contains the total purchases for last year and current year to date, along with the total value of current inventory on hand.

Inventory Details – Located under reports > Inventory > Inventory Details Report. This report shows a more complete picture of your inventory including: $ Amount/Quantity of purchases, Qty sold, $ Amount/ Quantity on hand, Cost, Markup % and Selling Price, Total Purchase amount and total on-hand amount.

Estimates:
Located under Reports > Utility Reports > Estimate Template List. This report outlines your saved estimate templates with the option to view details about each estimate or a summary report showing only the minimum and maximum values of each estimate.

Hot Items:
Located under Reports > Productivity Reports > Hot Items Report. This report generates a list of your most frequently sold products. Select specific date ranges and other options.



Profile Overview

Summarize your numbers:

# of Clients Avg/per client	# of Patients Avg/per patient
Total Net Services	Total Net Payments
Outstanding A/R	Inventory $ On Hand
Procedure Sales	Inventory Sales

Goals

Create Goals for the year.

- Goals
- Things you do well
- Areas to improve
- Outline a plan on how to achieve your goals
- Be realistic and celebrate milestones!

Additional Sources

Small Business Association: http://ww.sba.gov/library/pubs/mp-6.doc

Good to Great: Why some companies make the leap and others don't – Jim Collins

Who moved my Cheese? – Spencer Johnson

Fish! www.charthouse.com

Give em' the Pickle http://www.customerserviceuniversity.com/pickle.html