



IntraVet

Veterinary Information Management Systems
User-friendly software for animals, and people.

Quick Reference

4140 Tuller Road

Dublin, OH 43017

Support: 800-422-8875

Sales & Supplies: 877-422-8838

Fax: 614-792-8777

Email: name@intravet.com



OPENING PROGRAM

1. Double click on your IntraVet icon
2. Check for correct date and time, if not correct check on the workstation AND the server

ADDING NEW CLIENTS

1. Open Client Acct Management
2. Click on *NEW CLIENT* and Start adding Information
3. Include any reference information under Setup or General Tabs
4. Once information is saved, to edit client information, click on *EDIT CLIENT*

You will NOT be able to change the acct number after being saved through *EDIT CLIENT* but you are able to change any of the client's personal information. Acct number changes are done through *Utilities*.

ADDING NEW PATIENTS

1. After adding client click on *NEW PATIENT* button
2. Add Pet Information; the least you can add is Pet Name and Species.
3. Pet's Name will be in all Uppercase automatically.
4. Continue until all pets are entered.
5. Once saved, to edit pet information, select the correct pet in Client Action and click on *EDIT PATIENT*

You CANNOT change the Pet's Name in *EDIT PATIENT*; this must be done through *Utilities*.

EDITING HISTORY

1. Select Correct Pet Name at the top of the Client Action screen and click on *PATIENT HISTORY*
2. Right click with your mouse to open the history menu & left click on *EDIT HISTORY*.
3. Once inside of *EDIT HISTORY*, you can delete or add codes as needed. Be aware that changes made will change the patient's history.
4. Click on *SAVE* to save the information you have changed. You will be prompted that saving will overwrite any information; if you have the correct information entered left click *YES* to overwrite.
5. If you do not want to save, click on *CLOSE* to close out the *EDIT HISTORY* window

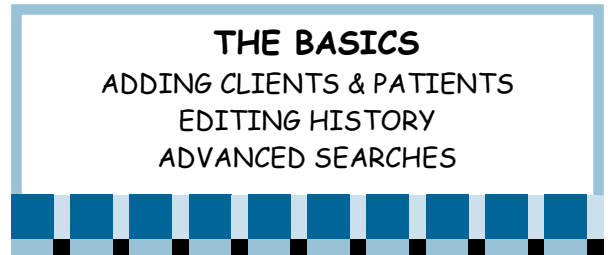
LOOKING UP CLIENTS

1. Open Client Acct Management Window and type in either Acct # or Last Name of client you want to access
2. Tab over and type in the First Name if the client you want did not come up first alphabetically OR press the F3 button on the keyboard for a visual list including address and patient information.
3. Click on Action or press ENTER on the keyboard to go to the selected client's acct.

To select clients under the *Last Ten Clients*, double left click on the client you want to view.

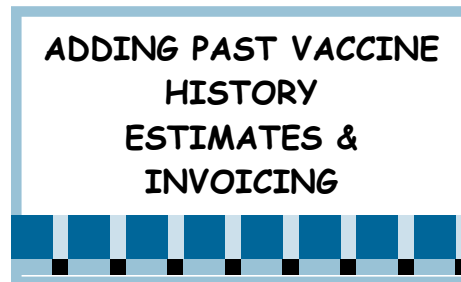
ADVANCED SEARCHES

1. Open the Client Acct Management Window and click on *ADVANCED SEARCH*
2. Click on the button you want to search: *PATIENT NAME/TAG ID/PATIENT ID/PHONE NUMBER/ALT LAST-FIRST NAME/INVOICE*
3. Type in appropriate information and click on *SEARCH*
4. Scroll up and down using arrow keys or scroll bar to the left, to find the correct selection.
5. To go to that acct, make sure the one you want is highlighted and click on *SELECT*.



ADDING PAST VACCINE HISTORY

1. Select Correct Pet Name at the top of the Client Action screen and click on *PATIENT HISTORY*
2. Right click to bring up menu and left click on *Reminders*
3. Add vaccine code and select *Enter*. Select a Dr (leave empty if vaccine was given elsewhere) and type in a due date for vaccine.
4. Select *Enter* to move the information up and continue entering until completed.
5. Once all vaccine information is entered, select *Save* to save your information and close the window.



ESTIMATES

1. Open client's acct through Client Acct Management and Select the correct Pet at the top
2. Click on *ESTIMATE* and enter the codes for your estimate
3. You have the option of creating a range for the dollar amount based on what you put in for the *MINIMUM* and *MAXIMUM* Amounts.
4. This will show a range for the estimate services that the client can expect
5. Estimate templates can be created and saved for your commonly used estimates by choosing *Save as a Template*. Once a template is saved, it can be loaded into any client's acct.

ENTERING INVOICES

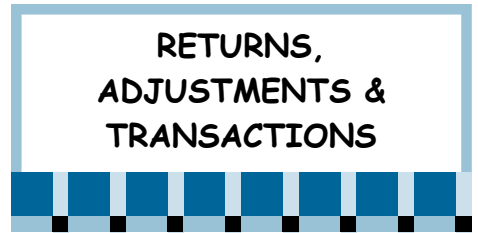
1. Go to Client's Action screen.
2. If there is only 1 pet on the acct click on *INVOICE*. For multiple pets, you have the choice of selecting the correct pet at the top now *OR* clicking on *INVOICE* and then selecting the correct pet. If the pet is selected during invoicing you must press *ENTER* to get to the next screen
4. Enter the Doctor and Weight (weight is optional) and press *Enter* or Click *OK* **If invoice needs to be backdated, select the date you want at this time. It will always default to *TODAY'S* date. You cannot add a weight on a Backdated invoice.**
5. Put in the first code and press *ENTER* or click on the small *N* at the end of the line with the mouse
6. The above step locks the code and allows you to edit any information (*DR/Date/Quantity/Prices/Amount*)
7. Once you have the information in, click on *ENTER* to load the code to the top
8. Continue doing the above listed steps until all codes are entered
9. When you finish entering codes and are ready to take a payment, click on *PAYMENT*
10. Enter payment information including any check numbers/type of credit card or *CONFIRM CHANGE BUTTON* to give change back. Then press *ENTER* or click *OK*
11. The next step is to click *SAVE* to save the invoice.
12. 5 options on how to save the invoice:
 - ***SAVE PERM AND PRINT*** - to conclude the transaction and give the client a receipt.
 - ***SAVE PERM AND NO PRINT*** - to conclude transaction with *NO* receipt.
 - ***SAVE TEMP AND PRINT*** - to give the client a receipt of the running total of charges so far but not to take a payment. Invoice can still be added to as needed until saved permanently.
 - ***SAVE TEMP AND NO PRINT*** - to enter charges in that are not ready to be concluded at this time or that will be added to at a later time.
 - ***GO BACK*** - Go back to Invoice to modify any information
13. If you click on ***SAVE PERMANENTLY AND PRINT*** then you will be asked for an *INVOICE MESSAGE* > select appropriate message and then click *OK/SAVE* or click on *NO MESSAGE*
14. Enter Operator ID and then press *ENTER* or click on *OK*



IMPORTANT POINTS IN INVOICING

- If you do not press ENTER to load a code to the top of the invoice, the code will not be saved with the invoice.
- For multiple pet invoices, Click on the *CHANGE PATIENT* button to select another pet and add charges to the invoices. When the invoice is printed, each pet will get one invoice. The last invoice printed will show a zero balance if the balance was paid in full.
- Invoices saved temporarily are located in the *Work In Progress* button on The Client Acct Management Window. They can be loaded by going into the Client's Action screen and clicking on the *INVOICE* button. On multiple pet invoices, if saved Temporarily, each pet's invoice must be loaded by selecting each pet, pressing ENTER and bringing the codes through. In the bottom left corner the text will tell you who has open invoices. Invoices will load automatically on single pet invoices.
- Only "ACTIVE" pets are available for invoicing.
- Certain codes will have additional prompts. You have the option to PRINT NOW- which will print the item now or to SAVE TO PRINT -which will print the item when SAVE PERMANENTLY and PRINT is selected. If you select SAVE TO PRINT, then save the invoice PERMANENTLY and NO PRINT, you will NOT print the document.
- Prescription Labels will pop up for codes tied to labels. After entering the instructions for the medication, you have the option to PRINT NOW or SAVE TO PRINT (If you choose SAVE TO PRINT, a label will print when saved PERMANENTLY and PRINT is selected)
- Codes set up for Callbacks will pop up with a prompt telling you what date the callback is scheduled for and also how many days it will stay on the list. You can change the dates if needed.
- If setup, a Rabies code will pop up with 2 prompts, the 1st one is to enter the tag number and the 2nd one is for editing the Rabies Producer and serial number for the certificate. You have the option to *PRINT NOW* or *SAVE TO PRINT*. Changes to the Producer or serial number can be done on the 2nd prompt. These changes will only be saved on this code. Additional rabies codes will need this information changed on them also.
- In most clinics, Euthanasia/Cremation codes are set up to change the patient status to Euthanized.
- For Held Checks, the payment must be processed before or after the invoice is saved Permanently. Click on the *PAYMENT* Button on the Client Action Screen. Enter the check information and change the date to the date you will deposit the check. Type in the description field "HELD CHECK". *SAVE* or *SAVE and PRINT RECEIPT*. The check will show up on the End of Day Transaction Report for the date you selected to post it.





RETURNS

1. Click on *TRANSACTIONS* in Client Action Screen
2. Right click and expand the invoice that you want to do the return on.
3. Right click on the item to be returned & choose *Return*
4. Adjust quantity and select *Continue*.
5. You have the option to put in a descriptive reason for the return and based on the return item, the option to include the dispensing fee in the return. Fill in any information in the *Medical History Log*, if you would like information about this return posted to the medical history.
6. If you are giving money back, select which method you will use to return the money (Cash/Check/Credit Card)
7. If you are giving them a credit on the account, zero out or delete the amount listed under Refund Amount. Click on *SAVE* or *SAVE and PRINT RECEIPT*.
8. If a client is getting a credit on the account, and will be exchanging or purchasing other items, process the Return prior to the purchase to show a credit balance. They may then purchase items and pay the difference.

REFUNDS

1. Click on *TRANSACTIONS* in Client Action Screen
2. Right click and select *Refund*
3. Select the method of payment and the amount you want to refund.
4. If needed, change the description and date of the refund.
5. Click on *SAVE* or *SAVE and PRINT RECEIPT*.

TRANSACTIONS

The transaction button will allow you to see prior invoices that were processed. This is client specific NOT patient specific. Each pet's invoice is stored as a separate invoice. Payments, returns, refunds and credit and debit adjustments are also stored separately from the invoices.

Viewing Transactions:

1. Click on the *TRANSACTION* button in the client action window
2. Right click on the transactions you wish to view and select *EXPAND*. This view will let you see the specifics of the transaction.
5. Right clicking in this window and left clicking on *OPTIONS* will allow you to select what you see in the transaction window. If you always like to view Payment and Invoice line items, check those boxes and click on *SAVE PARAMETERS* to save your option choices globally. Clicking on *OK* will only change settings for the current view

Reprinting Items in Transaction:

1. To print an invoice->Right click on the invoice you want to reprint and Left click on REPRINT INVOICE.
 2. To print a payment-> Right click on the payment you want to reprint and Left click on PRINT RECEIPT.
- Note that printing an Invoice only shows what is on an invoice and printing a payment will only show a payment

Printing more than 1 transaction at a Time (ie. An invoice and a payment):

1. Right click in a text area->then Left click on PRINT TRANSACTIONS.
2. Click on the *OPTIONS* button to select what options you want for printing transactions.
3. Select type of transactions to print and choose a date range you wish to print or leave blank for all dates.
4. Check the *SHOW PAYMENT* and *SHOW INVOICE* Line items to show complete details of the transactions.
*Clicking on the *SAVE PARAMETERS* button will globally save your choice of options
5. Click on the *OK* button when finished with options

You now have the option to Display what you have selected or Print your choices. You can always Display first and then print from the Display.



Credits and Debits

Credit and Debit adjustments allow you to create a credit or charge on an account for an amount of money either by a particular category or by free forming a reason.

CREDIT & DEBIT ADJUSTMENTS

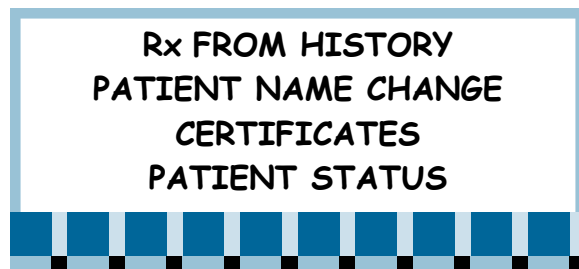
1. Click on *TRANSACTIONS* and right click to display menu. Left click on *FINANCIAL ADJUSTMENT*.
2. Check either the *Credit or Debit Adjustment* box.
3. Select a transaction type category. If needed, change the description to reflect information about the adjustment (the description does not determine the category, the selection in the grid determines which category the adjustment will fall under). No Transaction type can be used as a general area for adjustment types that do not fit into your other categories and may only be used occasionally.
4. Enter in the amount of the adjustment (The adjustment date automatically defaults to today's date but you can backdate if needed)
3. Click on *SAVE* then *REFRESH* to view your adjustment



RX FROM HISTORY

Rx's can be printed from history. This will allow you to reprint previous Rx's that were printed, keeping the doctor's original instructions, or you can create new ones if they are not selected in code setup to print from the invoice:

1. Select the correct patient on the client's main menu.
2. Click the *PATIENT HISTORY* button.
3. Right click on the Rx you want to Reprint or right click in the text to print a brand new label.
4. Any information can be changed at this point. Once the Rx is complete, you have 3 options: Click *PRINT ONLY* to print (or reprint) the label, click on *PRINT and SEND to INVOICE* to create an open invoice, or click on *CLOSE* to close out the label completely.



Any Rx printed and sent to the invoice is stored in the Visit Services Area. It will NOT show up in Work in Progress unless the invoice has been saved temporarily at least once. If you need to delete a Rx, right click in the patient's history and left click on *VISIT SERVICES*. Delete the item inside of Visit Services, making sure to choose *SAVE* to keep your deletions. If an item was sent to an invoice through a patient's history, it will continue to show up on the invoice unless it is deleted through Visit Services.

To view any items listed in Visit Services go to **REPORTS > PATIENT REPORTS > VISIT SERVICE LIST**. This list will show you every Client/Patient who currently has something in Visit Services.

PATIENT NAME CHANGE

1. Close all the windows inside of IntraVet
2. Go to *TOOLS* at the top > *UTILITIES* > *PATIENT UTILITIES* > *PATIENT NAME CHANGE*
3. Find the Acct you want to change the Pet's Name on and then select the correct pet
4. Go to *NEW NAME* and Type in the correct/new name for the pet and click on *START*

PATIENT FORMS OR CLIENT HANDOUTS

Patient forms and Client Handouts are used to replace preprinted forms such as consent forms, or euthanasia release or as a client education tool.

1. Click on the *CLIENT* menu choice at the top and click on *PATIENT FORMS* or *PATIENT CLIENT FORMS*
2. Bring up the client's acct, the correct patient and select a form and doctor and then click on *PRINT*

CURRENT VACCINATION / SPAY & NEUTER / HEALTH AND RABIES CERTIFICATES

This feature is used to print current certificates for the patient (It will not list those vaccinations that are past due or print rabies certificates if they were not printed in IntraVet at least once.)

1. Click on the *CLIENT* menu choice and select the appropriate Certificate
2. Bring up the client acct and patient and click on *PRINT*

A rabies certificate can be re-printed only if it was printed at the time of vaccination. If you need a copy of a certificate that never printed through IntraVet, the Current Vaccination Certificate will list the Rabies Vaccination if it is current. For data that was converted, if the vaccination(s) was given prior to the conversion, you will not be able to print a current vaccination sheet. You can however, print their history showing reminders only.

PATIENT STATUS

Patient status allows you to toggle a pet back and forth based on current status. Status selections are: **ACTIVE-DECEASED-EUTHANIZED-GIVEN-INACTIVE-MISSING**. Once a pet's status has been changed to something other than active that pet will not be available for invoicing, viewing history, etc through the Client Action screen. The name will show up in Red and display the status when using F3. To view the pet's history whose status is NOT active you must go to Patient Status under the Client menu choice at the top of the window.

1. Select the Client acct and patient. Click Display to view (and print if desired) or Print to print history.
2. If you want to invoice this pet, you must active them by changing status back to **ACTIVE**.



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.

TYPICAL REPORTS



DAILY REPORTS

End of Day Report

Most often used to balance the receipts at the close of the day. Even though IntraVet does not force you to "close" the day, it is recommended that you run and file the end of day report each day. There are several options for running this report. The End-of-Day Transactions Report can be run for any date range and at any time of the day. This report calculates the financial totals at the end of a business day, but can also be a periodic check during business hours (use the Display button with the Totals Page).

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

End of Day Services

The End-of-Day Services Report lists the services for each invoice that was permanently saved during the date range specified. For each invoice, you will see the individual line entries including the code, doctor, quantity, and price. Sales tax, percentage discounts, and payments are not included on this report. Run this report by individual doctor to review the charge assignments.

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

MONTHLY REPORTS

Transactions Totals

The Transaction Totals Report is generally run monthly or quarterly. This report includes a totals page similar to the End-of-Day Transactions Report totals page. When you enable daily totals, one line prints for each day with activity. The information in the line includes services, tax charged, percentage discounts, returns, and activities in Debit & Credit adjustments.

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

Transaction Analysis

The Transaction Analysis Report shows all clients who have charges, payments, and/or adjustments during a specified period. With this report you can look at the opening balance of client, charges, payments and adjustments to see how accounts receivable has changed. The "Services" column on this report includes only invoices. Billing fees, monthly interest, debit and credit adjustments are reported in the payment column (as negative or positive)

- Date range searchable
- Shows opening balance of client, charges, payments & adjustments to see how AR has changed
- Most often used to control AR - shows clients with services not paid
- Totals DO include sales tax and discounts





Accounts Receivable (may also want to run Past Due Accounts)
Clients who have an outstanding balance appear on the Accounts Receivable Report.

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

Management Control

Use the Management Control 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.

- Comes from Invoice Transactions and shows services comparing this period to last year's sameperiod & this YTD comparing last year's YTD
- Calculates, reviews & tracks activity of Accts Receivable w/in a date range
- Can calculate number and average of visits and invoice

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

Doctor Productivity and/or Doctor Productivity Analysis

The *Doctor's Productivity Report* separates each doctor's production by calculating departmental totals or detailed itemized departmental totals based on the amount invoiced during the specified date range. This report can be run for all departments or set to report on only one department. Productivity (sales) shows only the amount invoiced and does not reflect money collected. Services do not include tax or subtract percentage discount.

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.

- Dr. Prod report shows: Value of work done per doctor
- 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.
- Productivity analysis can also show how much revenue was generated (not collected) per doctor.

Client Visit Report

Shows how many clients have come to your office in a given period, including a count of repeat visitors. This report also shows the total number of clients and patients currently in your database. Included in the printout are the number of new clients and patients added to the database during the given period.

- Number of client visits including repeats
- # of new clients and pets

Controlled Items

Prints list of Controlled Drugs dispensed during specific period

- Shows client/pet/amount/invoice number/date/drug

Sales Tax

Lists total sales, exempt sales, net taxable sales & the tax collected for date range specified

