At the end of each business day you will want to have AVImark prepare reports that summarize the day’s activity and income, as well as print your deposit slip. Furthermore, at the end of the month you will probably want summary reports of the month’s activity. AVImark provides a flexible method whereby you can have various reports prepared that list income, treatment, rabies vaccinations, controlled substances, and other data for any period of time.

In this chapter you will learn how to:

“Run the Reports” on page 1
“Choose a Report” on page 3
“See the Bottom Line” on page 4
“Period-to-Date Reports” on page 4
“KASPER” on page 7
“ASAP” on page 8
“CURES” on page 8

Run the Reports

Select the report period
With the exception of the Payment Summary Report, Open Invoice Report, and the Unposted Transaction Report, all reports can be printed for any time period you choose.

- On the CID, open the Work with menu. Click Reports to display the End of Period Reports window.
- Use the Period drop-down list to select the time period you wish the report to cover. By selecting a period, AVImark automatically specifies the dates for that period with today’s date as the ending date.
Chapter 20: Period to Date Reports

AVImark also allows you to print reports for a period beginning with the previous date and time of the day. This is kept by AVImark as the closing date and time, allowing you to print activity reports back to the time the reports were last closed.

- Open the Print by menu and click By closing to display the Select period to print window.

- If business has been conducted since the last closed report, the top entry will be open period.
- Select the reports which you wish to print and click Print.
- You will need to click Yes to confirm.

Start/End
If appropriate, you may choose the Start/End dates for the period.

- Using the Start/End drop-down calendar, select the date for the period you wish to print for.
Chapter 20: Period to Date Reports

Doctor
Allows you to organize the reports you are printing. You may choose for a selected doctor, for all
doctors as separate reports, or for a consolidated report which includes all doctors.

- Use the Doctor drop-down menu and select how you wish to organize the reports.
- In the Doctor field, right-click to see the shortcut menu. Select the Include and Sort by options that you wish. Options include:
  - Include Users
    This allows you to add all users in Users and Security to the drop-down menu.
  - Include Inactive
    This allows you to add all users in Users and Security who have the Inactive Box checked.
  - Sorting Options
    This allows you to sort the drop-down menu by selecting; By Name, By Sequence, or By Appointment Sequence.

Print to
- Use the Print to drop-down list to select the printer to use for the reports. By specifying the Excel option, you can print or save this report to the desired location.

Preview
As with any other print area of AVImark, you may preview, email or save reports.
- Select Preview and click Print to preview the report on screen.

Sort by
You may choose how to sort the report(s) you are printing. You may sort by Account number, Amount, Date, ID number, Name, Rabies Tag number, County, Species, and City.
- Use the Sort by drop-down menu to select how you wish to sort the report(s).

Report Code
You may print an activity log for patients receiving treatments and/or inventory items for which one or more, (up to three), Report Codes have been assigned.
- If appropriate, type the Report Code(s) you wish to print for.

Company
When adding clients to AVImark, each client is automatically assigned a Company number (typically 01). You may wish to divide your clients into groups for reporting and billing purposes, you may assign any client company number according to the group they belong to.
- If appropriate, enter the Company number you wish to print for.
- To print reports by company number as specified in Medical History, activate the Detailed reporting by company in Hospital Setup, Advanced Options.

Site
When charges are entered into Medical History, you may enter a Site number. In addition, over-the-counter sales entered into accounting may also have a Site number specified. AVImark lets you print most reports by Site number.
- If appropriate, use the Site drop-down menu and select the Site number you wish to print for.

Choose a Report
- Select the name of the report you wish to print from the Don’t Print These field.
- Use the Single Left Arrow (<) button to move the report over to the Print These field.
- Repeat this procedure to select other reports.
• Using the same technique, you may move any report back to the Don’t Print These field by using the Single Right Arrow (>).
• Move all reports within either field by using either the Double Left (<<) or Double Right Arrows (>>) appropriately.

To learn more about:
Save/E-mail Reports
Reports that can be printed by Client Code
Sort and Filter Reports
Export Reports to Excel®
Reconcile Reports

Search the Help for:
Running Reports

See the Bottom Line
In addition to running and printing reports, AVImark allows you to see instant production totals for any period. (Returned checks will be subtracted from the bottom line because the bottom line shows the current amount of money).
• Select the period of time you wish to view statistics for using the Period drop-down menu.
• Ensure the period of time shown in the Start and End fields reflects the period of time you wish to report.
• Click the Bottom Line button.

Period-to-Date Reports
The following is a list of the AVImark Period to Date Reports which are available for printing:

Account Summary
This report summarizes the accounting of each client that made a payment or incurred a charge during the period. It shows such information as beginning balance, charges, payments, and ending balance.

Audit Trail
This report tells you which employees performed certain functions, at what time and at which workstation the task was performed. These functions/tasks include removing accounting transactions, removing clients, etc. as shown in the Audit Table as part of the System Tables window. This report is designed to tell you which employees are doing certain tasks that you would like to monitor.

Controlled Substance
This report lists activity for controlled substances. In order for a treatment or item to appear on this report, it must meet one of the following criteria listed below:
  o The treatment/item must have a C Action Code at the time it was entered into Medical History and be posted to accounting.
  o Items linked to treatments must have a C Action Code when entered into Medical History and be posted to accounting.
  o Received items on Purchase Orders must have a C Action Code.

Deposit Slip
Included on the deposit slip is the date of each transaction, the type, check number, client name, and the amount of each entry.

Health Plan Report
This report will display a list of all patients currently on a Health Plan. Each Plan will be displayed with a heading on the report, with a list of all patients on this plan. Along with patient information, other pertinent information will be reported as well, such as the expiration date of the plan and which services have yet to be performed.
Held Check Report
The Held Check Report will display a list of all checks being held during the current time frame. This report is also printed automatically after the Deposit Slip Report.

Income by Provider Report
The Income by Provider Report will display an income analysis for all providers in your clinic. Income is defined by payments received. It may be broken down by doctor and is based on charges, such as treatments, items and diagnosis, showing the percent of your income. AVImark will know which doctor the income is specified for by looking at the charges for which the income was applied and which doctor implemented the charges. When this report is selected for printing, you will notice a tab on the right side of the screen will appear named Income options. These options are only relevant to this report, and give you the opportunity to print this report including Client detail, Transaction detail, and/or Include Inventory Sales. With none of these options checked, AVImark will print a report with Totals Only.

Income by Treatment Summary Report
This report shows your income for treatment, inventory and diagnosis, showing the percent of your income. This report may be printed for each doctor or a consolidated report which reports the activity of all doctors combined. Treatments, Items and Diagnosis given to patients that have income, are listed alphabetically under each category. For each treatment, item or diagnosis, income values are given with percentages of the total income along with quantities and percentages of the total quantity. Totals are given at the bottom of each column. It also summarizes your income by treatment type, showing the percent of your income that was derived from each treatment category. You also have the option to use the Average Cost or current Cost when calculating the Expense of Inventory items.

Inventory Used Report (Illinois)
The state of Illinois requires clinics to charge tax for items that are sold to clients as part of a service. For those clinics that do not choose to stop selling retail items they must start tracking all items that are administered to a patient as part of a service that is performed. The report lists patients who received items sold as inventory used verses being sold directly. The Total, Cost and Price amounts on the report will look directly at the inventory item at the time the report is processed. The exact cost and price amounts specified in the Inventory List at the time the item is dispensed is what AVImark will use to process the report figures.

Open Invoice Report
This report will display a list of all open invoices along with their totals and dates of service. This report is usually printed before statements so you can see which clients still have invoices open.

Patients by Treatment Report
This is a consolidated report for all doctors with treatments, items and diagnosis listed alphabetically for each category. For each treatment, item or diagnosis, the client(s) for whom the service was performed, are listed beneath. Several columns of information are available displaying the client number, the client name, residence phone, patient name, doctor performing the procedure, quantity, date, time, price, species, breed, age and sex values. This report provides a list of all patients that have received each treatment, item and diagnosis during that period. It is intended to serve as a reference source to determine quickly which patients were given which treatments, items or diagnosis.

Payment Summary Report
This report prints month-to-date totals for each payment type in the current month. Typically, this is a monthly report used to view payments in a summarized format Combined totals for Cash, Check, Master Card and Visa will print at the end of this report.

Period Totals
This Period Totals Report shows payments, production by provider, taxing amounts, late charge totals, account adjustments, etc.
Rabies Report
This report will include only those patients for which rabies vaccinations (treatments for which an Action Code of \texttt{R} have been assigned) were performed during the report period.

Rabies Report for Cary, North Carolina
A program was written for clinics in Wake County, North Carolina who need to send certain rabies information to the county. The utility program 	exttt{CaryRabies} creates an xls file for clinics to send the county either by email or on CD. For more information about the CaryRabies program, please call Technical Support.

Rabies Reports for Kane County, Illinois
A utility program was written for clinics in Kane County, Illinois who need to send certain rabies information to the county. The utility program 	exttt{KaneCountyRabiesReport} creates a txt file for clinics to send the county either by email or on CD. For more information about this please call Technical Support.

RabiesCSV Utility
AVImark has designed a utility program that will include required information for the following areas: El Paso, TX; Hamblen County, TN; Albuquerque, NM; and Charlotte County, FL. To access this utility from the CID select the menu option \texttt{Utilities, Utilities}. Type the name of the utility program, \texttt{RabiesCSV}. To print the appropriate report for your area select your location. The appropriate county must be assigned to the client for the information to be reported for Hamblen, TN or Charlotte, FL. Clients must have the appropriate city and state associated with their information and the rabies treatment must have the R action code in order for the proper information to print.

RabiesCSV Requirements for El Paso, TX
For clinics in El Paso, TX you are required to display on the Rabies report the Vaccine MFG and Serial number along with a column on the report showing the annual registration certificate due date and patient name due to renew the certificate. To report the renewal certificate date you must create a treatment with the exact description of \texttt{EP Registration Certificate}. This code must also have an annual reminder setup so the due date is reported and printed in the correct column on the report. The city of El Paso must be assigned to the client for the correct information to be reported.

Referral Report
This report is sorted by referral source. For each referral source, the invoice date is given along with the referred client’s name and phone number, patient’s name, charges, and payments made. The report only includes new clients who were added to the computer, did business with you during the report period and were referred to your hospital by an existing client. Referral thank-you letters may be automatically printed after the report, addressed to each of the referral sources.

Sales Summary
This report identifies production generated by the Admitting Doctor that is specified in the Enter Medical History Window. On the surface, this report is identical to the Transaction Summary report, however, this report is designed to be printed by the admitting doctor. The Sales Summary Report will show income for each treatment, item and diagnosis. The usage column shows quantity used and the expense column shows the associated inventory expense. You also have the option to use the Average Cost or current Cost when calculating the Expense of Inventory items.

Tax by Area
The Tax by Area report is used to assist clinics located in Ohio, Georgia, and Washington for compliance with state tax laws. This report is used in conjunction with the Zip field in the Enter Medical History window. This report displays the date of the transaction, the client’s name and account number, along with the total amount of non-taxable services for that client and date, amount of taxable services, tax paid, and total of the invoice. This information will be printed for each area that was used in the Zip field of the Enter Medical History window.
Chapter 20: Period to Date Reports

Transaction Journal
This report shows a very detailed list of all treatments, items or diagnosis performed during the time period. Because it is so detailed, you probably would NOT want to print one for any period other than a day at a time. The report is printed chronologically from top to bottom, listing every client and patient you treated, showing the treatments performed on each patient. Also shown are date of the transaction, type of transaction, descriptions, quantities, the expense of any inventory items included on the report, and the amount of each transaction.

Transaction Summary Report
This report shows totals of the categories of transactions for treatments, items and diagnosis. It is used as a guide for determining what percentage of income comes from each category - a profit center report. You also have the option to use the Average Cost or current Cost when calculating the Expense of Inventory items.

Treatment Control Log
This report allows you to produce a list of all patients that have received specific types of treatments or items, categorized by what is called a Report code. Up to 3 Report codes may be entered into the Report code field for any of your treatments listed in the Treatments or Inventory List. The report will list all selected patients in order of patient name. Patients having received a particular coded treatment or item will be listed under that heading. All treatments or items will be listed in alphabetic order by treatment code. If treatments or items from multiple categories are listed, the treatment or item category name will appear as a report section title. These treatment or item categories will also appear in alphabetic order.

Unposted Transactions
This report will show the total amount of services, items or diagnosis which have not yet been posted to any client’s account.

To learn more about:
Bottom Line
Typical Daily Reports
Typical End of Week Reports
Typical Monthly Reports
Quarterly, Yearly, Fiscal or Start/End Reports

Search the Help for:
Bottom Line
End of Period Reports

K.A.S.P.E.R. (Kentucky All Schedule Prescription Electronic Reporting)
This is a controlled substance log (primarily for Kentucky hospitals) that will include the hospital DEA identification with the provider’s identification for all designated items. The report will include the hospital’s DEA number, the client’s social security number or drivers license number, the patient’s birthday, the date of transaction, the controlled substance’s item code, the quantity of the item dispensed, the item’s NDC identification, the performing doctor’s DEA identification, the client’s name, the patient’s name, and the client’s address.

Setup
- Specify all doctors DEA identification in Users and Security.
- Specify the hospital’s DEA identification in the Demographics tab of Hospital Setup.
- Specify each controlled substance in the Inventory list with its own NDC code along with a C Action code.
Send the data

- On the CID, open the **Applications** menu and click **KASPER** to start the KASPER program.
- Using the **From date** field, specify the start date.
- Enter the number of days you wish the report to include.
- If using the **Export to** option, you will need to specify the drive you wish the data to be copied to.
- Insert a blank media disk in the correct drive and click **Run**.

**A.S.A.P. (American Society for Automation in Pharmacy)**

This is a controlled substance log that will include the hospital DEA identification with the provider’s identification for all designated items. The ASAP Report is applicable for Alabama, Arizona, Michigan, Mississippi, New York, Oklahoma and Tennessee.

**Setup:**

- Specify all doctors DEA identification in Users and Security.
- Specify the hospital’s DEA identification in the Demographics tab of Hospital Setup.
- Specify each controlled substance in the Inventory list with its own NDC code along with a C Action code.
- Create a unique RX number of each controlled drug. In order to get the unique number, use the Sequence numbers on drug labels in Hospital Setup, Document tab.
- To include the RX number on the ASAP report set the Hospital Advanced option, **Include Sequence Number** set to True.

Send the data:

- From the CID Utilities menu select **Utilities** and type **ASAP**.
- Using the **From date** field, specify the start date.
- Enter the number of days you wish the report to include.
- If using the **Export to** option, you will need to specify the drive you wish the data to be copied to. Insert your selected media in the correct drive.
- Select your location or state (i.e. MS, TN)
- Click **Run**.

The file will be in a .DAT format and will be named with your Hospital DEA number_date’.

**C.U.R.E.S. (Controlled Substance Utilization Review and Evaluation System)**

This is a controlled substance log (primarily used for California hospitals) that will include the hospital DEA identification with the provider’s identification for all designated items. This report will include the name of the file created, the DVM and Hospital Address, the performing Doctor’s DEA identification the hospital’s phone number, the date of the posted transaction (not the medical history date), the controlled substance name and amount used, the item’s NDC identification, the client’s name, the name and Birth date of the patient, the client’s address and the date the transaction was posted into Medical History.

**Setup**

- Specify all doctors DEA identification in Users and Security.
- Specify the hospital’s DEA identification in the Demographics tab of Hospital Setup.
- Specify each controlled substance in the Inventory list with its own NDC code along with a C Action code.

Send the data

- On the CID, open the **Applications** menu and click **CURES**.
- Using the **From date** field, specify the start date.
- Enter the number of days you wish the report to include.
• If using the Export to option, you will need to specify the drive you wish the data to be copied to.
• Insert a blank media disk in the correct drive and click Run.