



# **Current Members: VMG Quarterly Reporting Guide**

## **version 6.0 and higher**



**IMPROMED®**

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## Updating Product Types for VMG Chart of Accounts

Categorizing your revenue accurately to the VMG Chart of Accounts (COA) enables efficient and accurate benchmarking of practice revenues by standard GL definitions between practices. This document is meant to assist existing VMG users of the Improved or Improved Equine software (formally known as Infinity and Triple Crown) to update their product types to correspond with the new AAHA/VMG Chart of Accounts.

This guide provides step-by-step instructions to edit, delete, and create the Product Types needed to generate the data for entry into Companion Revenue. Going forward, the software will track revenue by the new Product Types.

The table below is the updated Product Types for VMG Companion Revenue Definitions. These new Product Types will be used to categorize your revenue to the VMG Chart of Accounts.

Product Types or Categories for AAHA/VMG Companion Revenue Definitions	
5001 Vaccine	5302 Outside (Reference) Lab
5010 Exam	5403 X-Ray
5020 Hosp & Treatment	5404 Dental X-Ray
5025 Fluid Therapy	5405 CT Services
5030 Diagnostic Services	5410 Ultrasound Services
5040 Rehabilitation	5415 MRI Services
5045 Laser Therapy	5420 Specialist (Imag) Consult
5050 Mortuary	5510 Non-Specialist Surgery
5060 Behavior Service	5520 Specialist Surgery
5070 Alt. & Comp Medicine	5600 Anes. /Sed./Tranq.
5080 Specialist	5700 Dentistry
5095 Medical Waste	5801 OTC Prod, Shamp & Nutri
5099 Lg Animal Svcs/Prods	5802 Pet Supplies Retail
5105 FDA Rx Med/Pill/Liq/Etc	5803 NON-FDA Flea/Tick Control
5110 Injection	5804 Internet Ancillary Prod
5115 FDA Rx Flea/Tick NON HW	5825 Boarding
5120 FDA Rx Combo HW/Parasite	5850 Grooming
5130 Internet Pharmacy	5880 Wellness Prepaid Plan Revenue
5201 Therapeutic Diet	5885 Wellness Prepaid Plan Adjustments
5202 Retail Diet	5905 Fee Discounts
5301 In-House Lab	5910 Returns and Allowances



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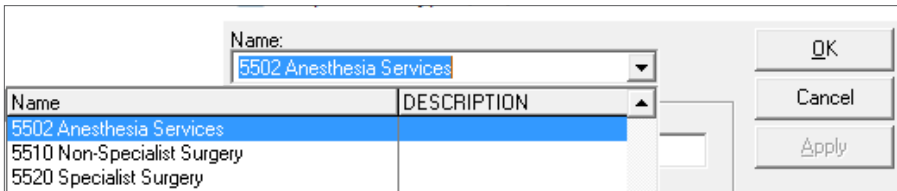


Impromed version 23.10.0 was used for this guide. Therefore, the button to access menus, modules, and setup screens may differ if you have an older version.

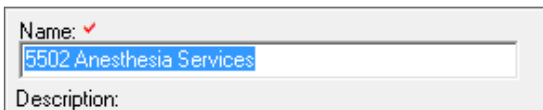
## Edit Account Number and Name

From the Desktop:

1. Click  or  **Setup > Products > Product Types**. The Setup Product Types dialog box opens.
2. Click **Edit** for **Mode**.
3. From the **Name** drop-down list, select the **Old Account** to be modified.



4. Click and drag the mouse over the current **Account Number** and **Name** to select it.



5. Type the **New Account Number** and **Name**.



6. Click **Apply**.

Using the chart below, make the changes to your existing Product Types. The old account is listed on the left and what the new account should be is listed on the right.

AAHA/VMG Account Number and Name Change			
Old Account		New Account	
5502	Anesthesia Services Revenue	5600	Anesthesia
5515	Dentistry Services	5700	Dentistry

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AAHA/VMG Account Number and Name Change			
Old Account		New Account	
5805	Boarding Services Revenue	5825	Boarding
5810	Grooming Services Revenue	5850	Grooming
5815	Pet Supplies	5802	Pet Supplies Retail
5890	Fee Discounts and Returns	5905	Fee Discounts
5896	Returns and Allowances	5910	Returns and Allowances
5900	Lg Animal Spec Svcs/Prods	5099	Lg Animal Svcs/Prods

## Edit the Name Only

The table below shows the chart of accounts which require a change to the Name only. On the left side is the Old Account and on the right is the name of the New Account.

To make the changes, follow the steps as outlined under “Edit Account Number and Name” on page 5. You need to select only the Name for editing purposes.

 **Double-clicking on a word selects (highlights) just the word. With the word selected, delete it, type over it to replace it, or format it.**

AAHA/VMG ACCOUNT Name Change Only			
Old Account		New Account	
5010	Examination	5010	Exam
5020	Hosp & Treat	5020	Hosp & Treatment
5030	Diagnostic Income	5030	Diagnostic Services
5050	Animal Disp/Mortuary	5050	Mortuary
5060	Behavior	5060	Behavior Service
5070	Alt. Medicine	5070	Alt & Comp Medicine
5095	Med Waste Disposal	5095	Medical Waste
5120	FDA Rx Combo HW	5120	FDA Rx Combo HW/Parasite
5130	Internet Pharm	5130	Internet Pharmacy
5201	Prescription Diets	5201	Therapeutic Diet
5202	Non-Prescription Diet	5202	Retail Diet



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AAHA/VMG ACCOUNT Name Change Only			
Old Account		New Account	
5302	Outside Ref Lab	5302	Outside (Reference) Lab
5403	X-Ray (Non-Dental)	5403	X-Ray
5404	X-Ray (Dental)	5404	Dental X-Ray
5405	Cat Scan	5405	CT Services
5410	Ultrasound	5410	Ultrasound Services
5415	MRI of Sales	5415	MRI Services
5803	NON FDA Flea and Tick	5803	NON-FDA Flea/Tick Control
5804	Internet Ancillary Sales	5804	Internet Ancillary Prod

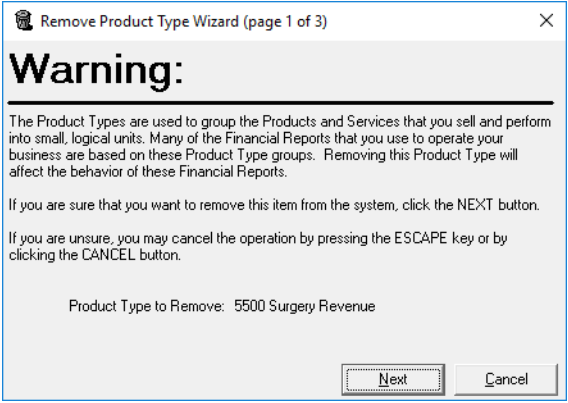
## Delete a Product Type

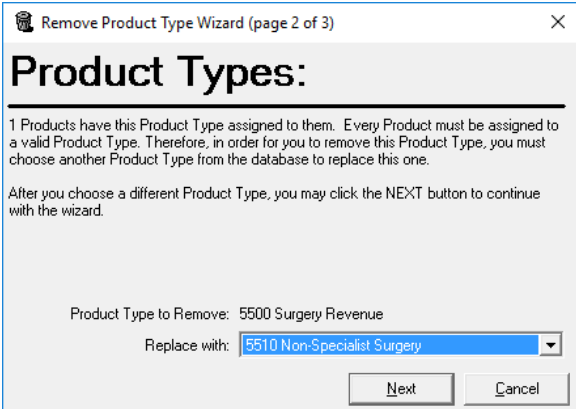
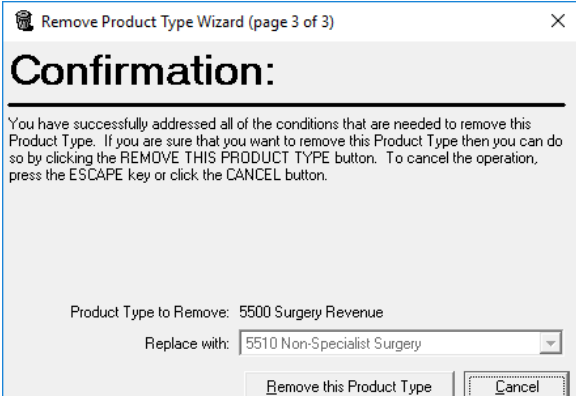
The steps below take you through deleting (inactivating) an account. When deleting a Product Type, a warning will appear confirming the deletion.

From the Desktop:

1. Click  or  > **Setup > Products > Product Types**. The Setup Product Types dialog box opens.
2. Click **Edit for Mode**.
3. From the **Name** drop-down list, select the **Account** to be deleted (inactivated).
4. Click **Delete**.

When deleting a Product Type, a Warning appears. If Services were assigned this Product Type, the option to select a replacement is provided.

<p>The warning is to make sure deleting the Product Type is what you want to do. Click <b>Next</b> to continue.</p>	
---	--

<p>If Services were assigned to the Product Type being deleted, an option is provided to replace the Product Type with another. Select the appropriate Product Type to replace the one being deleted. Click <b>Next</b>.</p> <p>If a Service was NOT assigned the Product Type being deleted, this screen does not appear.</p>	
<p>The final message is confirmation that you want to remove this Product Type. To proceed with removing the Product Type, click the button labeled <b>Remove this Product Type</b>.</p>	

Use the table below as a reference of what Product Types to delete.

Inactivate Accounts	
5100	Pharmacy
5500	Surgery Services
5800	Ancillary Products/Services

## Create a Product Type

Follow the steps below to create new Product Types. The table on the following page provides new account numbers and names.

From the Desktop:

1. Click  or  > **Setup > Products > Product Types**. The Setup Product Types dialog box opens.



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2. Click **Create** for **Mode**.
3. Type the new account number and name for the Product Type in the required field.

VMG recommends using the code and the naming convention within the name.

**Example:** 5001 Vaccine

4. (optional) Enter a description for the Product Type.
5. Click **Apply** to save the new Product Type and keep the dialog box open.
6. Repeat the steps to create additional Product Types.
7. When all Product Types are created, click **OK** to close the dialog box.

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Use the table below to create new Product Types to match the VMG Companion Revenue that will be entered into the VMG DATAlink benchmarking system.

AAHA/VMG New Accounts	
5080	Specialist
5105	FDA Rx Med/Pill/Liq/Etc
5420	Specialist (Imag) Consult
5510	Non-Specialist Surgery
5520	Specialist Surgery

## Final Product Types

As a final check, match your Product Types list in your Improved software against the table of “Product Types or Categories for AAHA/VMG Companion Revenue Definitions” on page 4. Make any changes to the Product Types in your list, as needed, so your list is the same as the VMG Companion Revenue Definitions.

## Assign New Product Types to Services (Products)

After creating the new accounts (Product Types), the new Product Types need to be assigned to Services. Within the setup of each Service are the options to assign Services to Categories, Profit Centers, and Product Types. This allows operators to view a breakdown of revenue or activity of Services by these groups. For the purpose of VMG reporting, you will be running reports by Product Type.



**At this time VMG recommends including the VMG DATAlink Field Definition codes and titles as your Product Types. If this requires changes to your existing Product Types, Improved does not recommend doing this until the end of a month, quarter, or year to help aid in the reporting functions when looking at your Product Types.**

There are two ways to assign or change Product Types for Services.



1. Individually through the **Setup Products** dialog box. Best when creating a new Service or editing one or two Services.
2. The **Product Spreadsheet**. This option is ideal when changing multiple Services at one time.

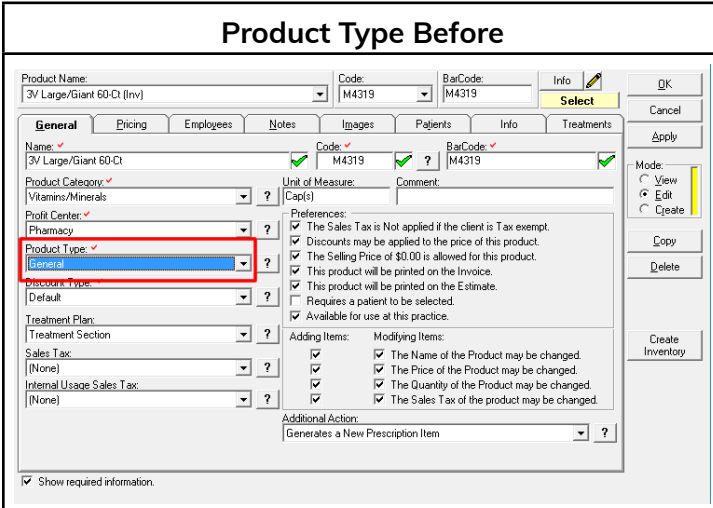
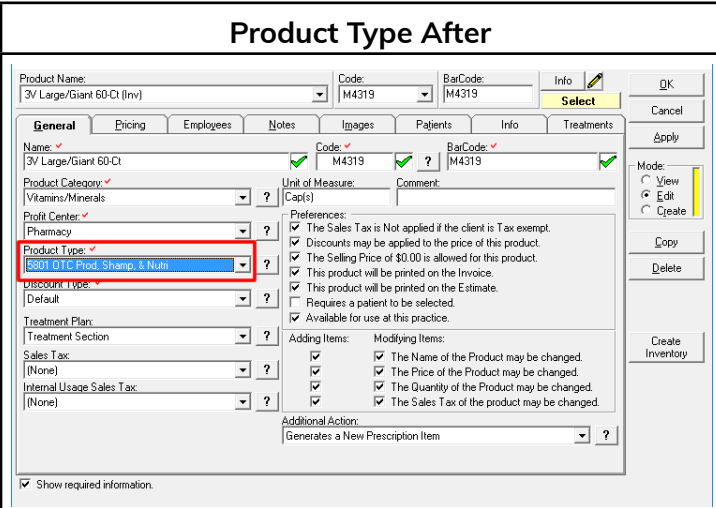
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## Using Setup Products

The steps that follow are the instructions to assign the VMG Product Types to Services using the Setup Products dialog box. This option is generally used when creating a new Service or editing only a few Services.

From the Desktop:

1. Go to  or  > **Setup > Products > Product Items**. The Setup Products dialog box opens.
2. Click **Edit** for **Mode**.
3. Select the Service to edit.
4. From the **Product Type** drop-down list, select the appropriate Product Type for the selected Service.

Product Type Before	Product Type After
	

5. Click **Apply** to save the changes and keep the dialog box open to continue assigning the VMG Product Types to Services.
6. When finished, click **OK** to close the dialog box.

## Assign Product Types Using the Product Spreadsheet



The steps that follow are the instructions to assign the VMG Product Types to Services, en masse, using the Product Spreadsheet. Before changing several Services at once you must first highlight the Services to change, then select the Services that are highlighted.

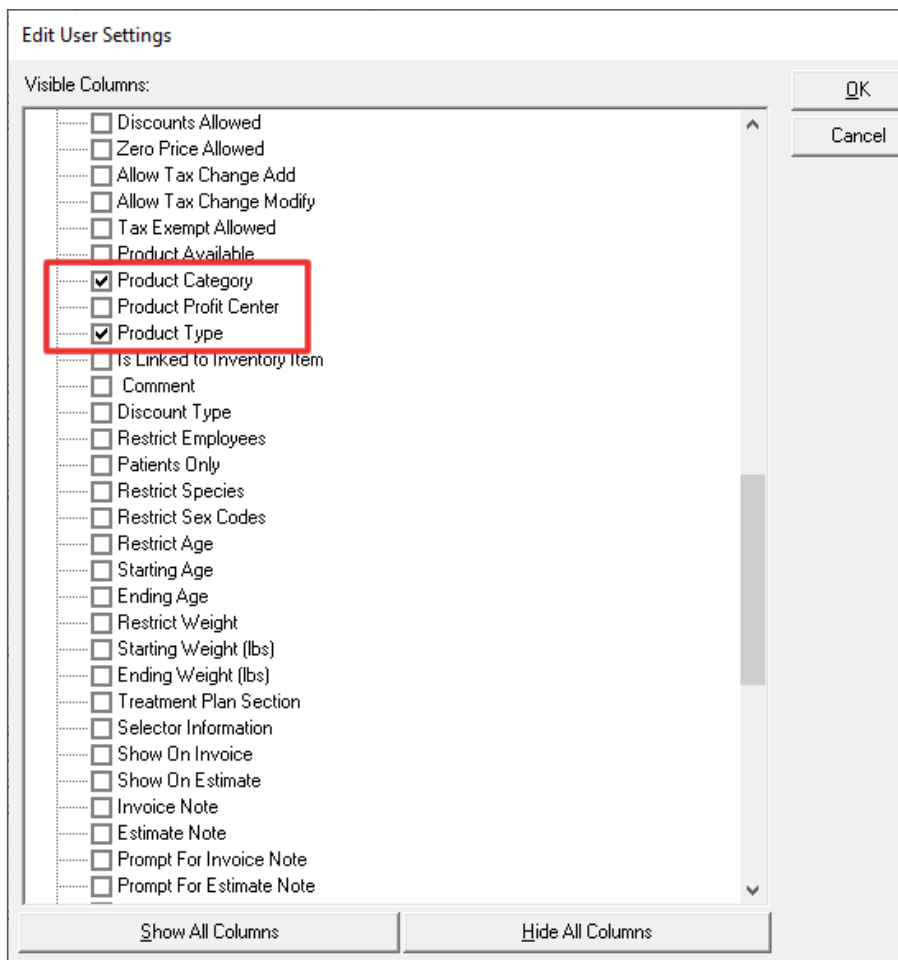


**Caution! Before proceeding with the following steps, it is strongly recommended you backup your database first. If you need assistance with performing a backup, contact Impromed Customer Support at (800) 925-7171.**

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From the Desktop:

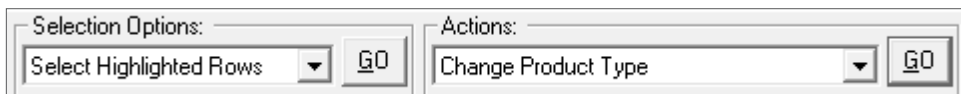
1. Go to  or  > **Setup** > **Products** > **Product Spreadsheet**. The Product Spreadsheet opens.
2. Click on the pencil in the upper right hand corner. The Edit User Settings dialog box opens.
3. At the bottom, click **Hide All Columns**.
4. Select the **Product Category** and the **Product Type** columns to be visible (they are approximately half way down the list of available columns). Showing the Product Category with the Product Type, and hiding all other columns, will make it easier to work in the spreadsheet and make changes.



5. Click **OK** to return to the Product Spreadsheet.
6. Click on the heading labeled **Category** at the top to sort Services by Category.

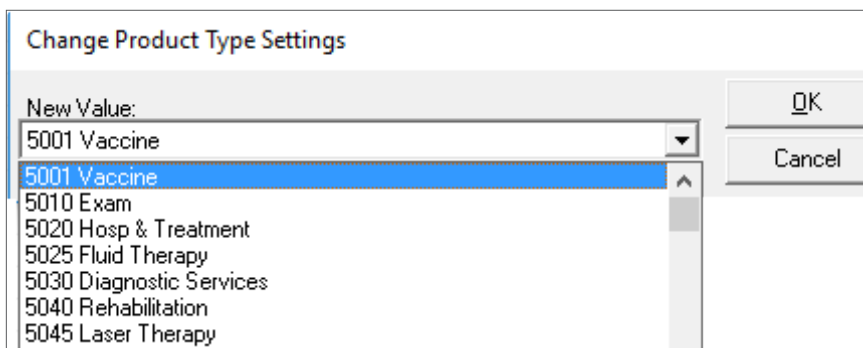
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- Next, you need to highlight Services that will be assigned the same Product Type. To highlight Services, simply click and drag the mouse to select a contiguous range of Services. You can also click on the first Service in the range then hold the shift key down as you click the last Service in the range.
- Once all Services, that will be the same Product Type, have been highlighted, they need to be selected. From the **Selection Options** list in the upper left hand corner, choose **Select Highlighted Rows** and then click **Go**. *This will place a checkmark next to the highlighted rows.*
- From the **Actions** drop-down, choose **Change Product Type**, then click **Go**.



The image shows two adjacent menu boxes. The first is labeled "Selection Options:" and contains a dropdown menu with "Select Highlighted Rows" selected and a "GO" button. The second is labeled "Actions:" and contains a dropdown menu with "Change Product Type" selected and a "GO" button.

- In the dialog box, choose the appropriate Product Type from the drop-down list then click **OK**.



The image shows a dialog box titled "Change Product Type Settings". It has a "New Value:" label above a dropdown menu. The dropdown menu is open, showing a list of product types: "5001 Vaccine", "5010 Exam", "5020 Hosp & Treatment", "5025 Fluid Therapy", "5030 Diagnostic Services", "5040 Rehabilitation", and "5045 Laser Therapy". The "5001 Vaccine" option is highlighted in blue. To the right of the dropdown are "OK" and "Cancel" buttons.

- Verify the changes are correct. If the changes are NOT correct, you have two options to revert the Services back to their original Product Type:
  - From the **Actions** drop-down list, choose **Reload Data without Saving the Changes** then click **Go**.
  - Or, click the **Cancel** button in the upper right corner. This will close the Product Spreadsheet without saving changes. You will need to re-open the Product Spreadsheet and re-select Services to reassign the Product Type.
- Repeat the steps to highlight, select, and change the remaining Product Types from the VMG Revenue Definitions to the remaining products to be reassigned.
- When all Services have been reassigned, in the upper right hand corner of the screen, uncheck **Update Price of 1 when Saving** then click **Apply**.
- When changes are complete, click **OK** to exit the Spreadsheet.



Rather than wait until ALL products have had the Product Type changed, click OK to save changes as you go along. Then simply repeat the steps to open the Product Spreadsheet and continue changing Product Types.



**Please be aware! Changes to the Product Type will not affect past transactions. These changes will only be reflected moving forward with new invoices.**

## Product Categories for VMG Chart of Accounts

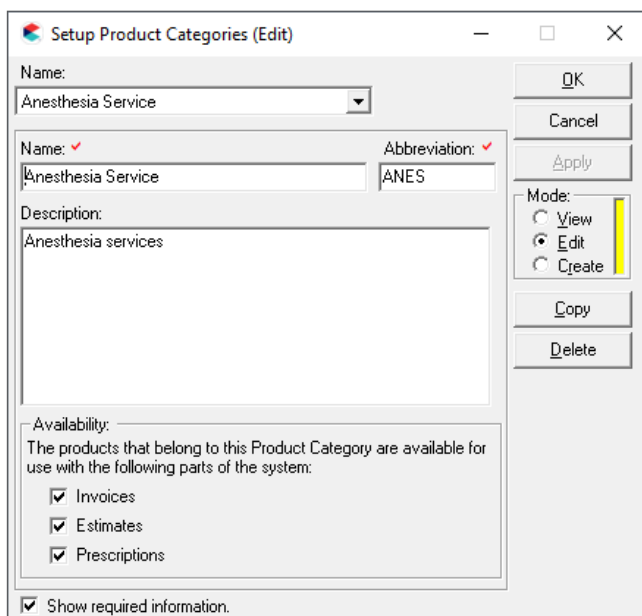
Members who use/or plan to use the VMG/ALLYDVM DATALINK Transfer Service, should set up their Impromed [Infinity] systems with the VMG code/descriptions at the Product Category level; otherwise, the transfer service will not work. Some practices opt to setup the Product Type and Product Category to both match the VMG Code/Description.

Refer to the table on page 4 for codes and descriptions.

### Creating or Editing a Product Category

From the Desktop:

1. Click  or  > Setup > Products > Product Categories.



Setup Product Categories (Edit)

Name: Anesthesia Service

Name: Anesthesia Service Abbreviation: ANES

Description: Anesthesia services

Mode:  
 View  
 Edit  
 Create

Copy  
Delete

Availability:  
The products that belong to this Product Category are available for use with the following parts of the system:  
 Invoices  
 Estimates  
 Prescriptions

Show required information.

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2. For **Mode**, choose **Edit** to modify existing product category names. Choose **Create** to create new categories.
3. Click **Apply** to save changes and continue editing or creating product categories. Click **OK** to save changes and close the dialog box.



## Assigning Product Categories to Services (Products)

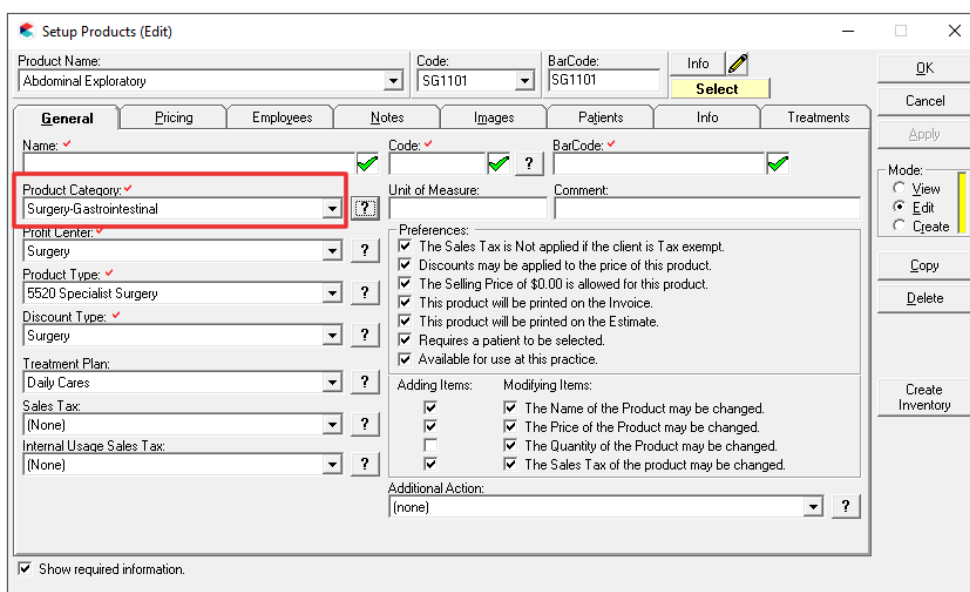
Like Product Types, Product Categories can be assigned from the Product Items dialog box or from the Product Spreadsheet.

### Using Setup Products

The steps that follow are the instructions to assign the VMG Product Types to Services using the Setup Products dialog box. This option is generally used when creating a new Service or editing only a few Services.

From the Desktop:

1. Go to  or  > **Setup > Products > Product Items**. The Setup Products dialog box opens.
2. Click **Edit** for **Mode**.
3. Select the Service to edit.
4. From the **Product Category** drop-down list, select the appropriate Product Category for the selected Service.



The screenshot shows the 'Setup Products (Edit)' dialog box. The 'Product Name' is 'Abdominal Exploratory', 'Code' is 'SG1101', and 'BarCode' is 'SG1101'. The 'Product Category' dropdown is highlighted with a red box and shows 'Surgery-Gastrointestinal'. The 'Mode' dropdown is set to 'Edit'. The 'Preferences' section includes checkboxes for 'The Sales Tax is Not applied if the client is Tax exempt', 'Discounts may be applied to the price of this product', 'The Selling Price of \$0.00 is allowed for this product', 'This product will be printed on the Invoice', 'This product will be printed on the Estimate', 'Requires a patient to be selected', and 'Available for use at this practice'. The 'Additional Action' dropdown is set to '(none)'. The 'Show required information' checkbox is checked.

## Using the Product Spreadsheet

Refer to the steps beginning on page 11 to use the Product Spreadsheet for assigning Product Categories to Services. Where the steps refer to Types replace with Categories.



## Patient Visits

Please use the VMG Patient Visit definition described below for both patient visit count and total patient visit dollar revenue:

A patient visit should be counted only when a patient is physically present in the practice and seen by a veterinarian for a medical or surgical service or for a professional service ordered by a veterinarian during the quarterly reporting time period. If a patient received a medication refill or other item was ordered by the veterinarian but the patient was not physically present during the purchase, then that purchase should not count as a patient visit or patient visit revenue for this calculation.

To enable the prompt for patient visits at the time the invoice is concluded:

From the Desktop:

1. Click  or  > **Setup** > **Invoices** > **Invoice Options**.
2. In the Setup Invoice Options screen, click on the **Settings** tab.
3. In the **Conclude Settings** area, enable the option, **Display Patient Visits screen before concluding the Invoice**.

When an invoice is concluded, and the prompt enabled, the Patient Visits screen opens. Operators have the option to change the Visit option.

**Example:** In the following image, the owner purchased a prescription for Moxie while at the clinic with Rogan. However, Moxie was not seen by any staff member; therefore, **Visit** is unchecked.



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Patient Visits X

Practice	Patient Name	Split Billed	Visit	Conclude	
Veterinary Hospital	Moxie	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	OK
Veterinary Hospital	Rogan	No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Cancel

- **Visit:** indicates if the patient was seen by staff at the time the products or Services were added to the invoice.
- **Conclude:** indicates if the invoice can be concluded for the selected patient(s).



The Visit/Conclude options can also be changed on the Conclude screen in newer versions of your Improved software.

## Appendix A: Generating Reports

### Summary Report

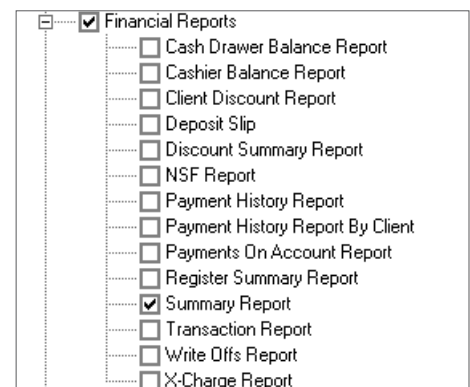
No report in Impromed or Impromed Equine provides more information about your business than the Summary Report. This report will provide statistics for the number of invoices per client and patient, the number of patients seen during the time range of the report, and the number of new clients and new patients. The Summary Report will also give a breakdown of revenue by Product Types.

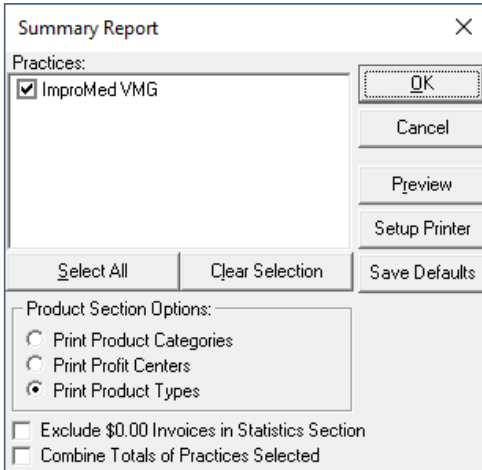
The report options are:

- **Practices** - Operators are able to select which practice the report is for in a multi-business environment.
- **Product Section Options** - For your reporting purposes for VMG, the option will be **Print Product Types**.
- **Exclude \$0.00 Invoices in Statistics Section** - VMG DATAlink reporting would like to see all invoices be included, even if the invoice has zero dollar values. Therefore, this option should be unchecked.
- **Combine Totals of Practices Selected** - If multiple businesses are available, VMG wants members to report each practice as a separate business entity when possible. Therefore, print the report multiple times selecting a different practice each time.

To Preview the Summary Report:

1. Go to **Modules > Reports**.
2. Expand the **Financial Reports** group and select **Summary Report**.
3. Verify the **Print with Defaults** is NOT checked. Then click **Print**.
4. From the **Report Date Ranges** dialog box, select the date range for the report.
5. Click **OK**.
6. In the **Summary Report** options, select the practice.
7. Select the option to **Print Product Types**.
8. Verify the option to **Exclude \$0.00 Invoices in Statistics Section** is NOT checked.





9. Click **Preview**. See the **Summary Report** on page 20.



You can click **Save Defaults** to save these settings for future printings of the **Summary Report**.

## Printing the Summary Report

1. From the Preview window, click the **Print** button.
2. From the **Print What?** dialog box, select the print options then click **OK**.

The report will print to the default printer or the Financial Reports Printer defined in Workstation Preferences.



**Please be aware! The Summary Report shown in this document is run from Impromed version 23.10.0. If you would like to update to the newest Impromed version, contact the Impromed Update Team at [Impromedupdates@covetrus.com](mailto:Impromedupdates@covetrus.com).**



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■ - The source for **Total Number of Patient Invoices and Patient Revenue** for the DATAlink requested Companion Animal Revenue DATAlink input form for DATAlink.

## Page 2 of the Summary Report

Veterinary Hospital		Summary Report		Monday, April 24, 2023	
		01/01/2022 - 12/31/2022			
Payments Made:	\$	4,552.28			
Subtotal of Payments Made:	\$	4,552.28			
Wellness Plan Product Payments:	\$	538.07			
Total Payments Received:	\$	<u>5,090.33</u>			
<b>TAXES</b>					
<u>DESCRIPTION</u>	<u>TAX RATE</u>	<u>BASE AMOUNT</u>	<u>CHARGED</u>		
(Taxes were not used.)					
<b>PRODUCT TYPES</b>					
<u>NAME</u>	<u>AMOUNT</u>	<u>NAME</u>	<u>AMOUNT</u>		
5001 Vaccines:	\$ 742.00	5070 Alt & Comp Medicine:	\$ 207.13		
5115 FDA Rx: Flea/Tick NON HW:	\$ 150.71	5202 Retail Diet:	\$ 138.40		
5301 In-House Lab:	\$ 687.99	5520 Specialist Surgery:	\$ 959.40		
5700 Dentistry:	\$ 88.00	5802 Pet Supplies Retail:	\$ 340.89		

The image above is page 2 of the Summary report. This is how the categories print when grouped by Product Type.

## Invoices/Products

Breaks all items invoiced into two categories, Non-Taxable and Taxable. The subtotal minus adjustments minus product discounts minus invoice discounts gives you the total for each of these sections. After each category total is calculated, taxes, write offs, interest, and NSF fees are all added/subtracted to give the total revenue for the business.

- Products Invoiced (Non-Taxable or Taxable) is the total of all products invoiced and concluded.
- Adjustments (Non-Taxable or Taxable) are any changes to the default price of products, whether during invoicing or from product attachments. Adjustments will also include corrections for all products that had an adjustment done on a previous day but were corrected on the current day. When this happens, the Summary Report will have different numbers than the Fee Exception Report.
- Product Discounts equals the total dollar amount of discounts applied to (non-taxable/taxable) products.
- Invoice Discounts equals the dollar amount discount applied (non-taxable/taxable products), from the Invoice Discount Button on the Conclude Invoice Screen.
- Total Non-Taxable Products Invoiced equals the total dollar amount of non-taxable products invoiced including Adjustments, Product, and Invoiced Discounts.

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- Total Taxable Products Invoiced equals the total dollar amount of taxable products invoiced including Adjustments, Product and Invoiced Discounts.
- Total Products Invoiced equals the total dollar amount of both Non-Taxable and Taxable Products.
- Tax Charged is the total of tax charged for all taxable products.
- Interest Charged includes any interest charged on accounts over 30 days.
- NSF Fees Charged includes charges generated from returned checks.
- Billing Fees Charged includes charges generated under Account Receivable to apply billing fees.
- Wellness Plans Revenue is the value of wellness plans cancelled or expired with any left over deferred revenue.
- Total Revenue equals Total Products sold minus Write Off, plus Interest Charged and NSF Fee Charged.

## Accounts Receivable

This section is broken into each of the aging categories (0-30, 31-60, 61-90, and over 90 days, as well as the sum of all of the aging categories). All new charges are added to a beginning balance. Any payments on account, credit balance adjustments, and adjustments to A/R are then subtracted to give an ending balance. The difference in each aging category indicates whether clients have paid off their old balances or not.

## Deferred Revenue

This section of the Summary Report shows revenue for Wellness Plans but the revenue is not accounted for until the products or services on the Wellness Plan are actually invoiced.

DEFERRED REVENUE	
DESCRIPTION	TOTALS
Deferred Revenue Beginning Balance:	\$ 3,946.40
+ Wellness Plans Invoiced:	\$ 8,786.74
- Wellness Plan Products Invoiced:	\$ 774.11
+ Wellness Plan Product Removals:	\$ 0.00
- Wellness Plans Completed:	\$ 0.00
- Wellness Plans Cancelled:	\$ 3,161.84
Deferred Revenue Ending Balance:	<u>\$ 8,797.19</u>

- Deferred Revenue Beginning Balance is how much is outstanding in Wellness Plans.
- Wellness Plans Invoiced is the dollar amount of Wellness Plans saved and activated for the date range of the report.

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- Wellness Plan Products Invoiced is the value of products/services invoiced from Wellness Plans.
- Wellness Plan Product Removals equals the dollar value of products/services returned back to active Wellness Plans.
- Wellness Plans Completed is the value of completed Wellness Plans past the expiration date of a plan.
- Wellness Plans Cancelled is the amount of deferred revenue in a cancelled wellness plan.
- Deferred Revenue Ending Balance is the difference between the Beginning Balance and the addition/subtraction of Wellness Plans Invoiced, Removed, Completed, and Cancelled.

## Statistics

The total number of invoices completed is split into three sections:

- Total invoices
- Client only invoices (a client purchases items but the Services are not assigned to a patient)
- Patient invoices (a patient has been assigned Services on the invoice).

Each of these invoice sections has a quantity, total gross, and average gross total to reflect each scenario. Impromed/Impromed Equine also keeps track of whether a patient visit took place or not. The statistics section gives counts on patient invoices that have been marked as patient visit = yes and patient visit = no, along with the totals and averages for each. Another statistic is new clients and patients added during the time frame the report was printed as well as the total number of clients and patients in the business.

DESCRIPTION	STATISTICS			COUNT
	QUANTITY	TOTAL	AVERAGE	
Client Only Invoices:	5	\$ 0.00	\$ 0.00	New Clients: 0
Patient Invoices:	1	\$ 114.20	\$ 114.20	Clients: 34
Invoices:	6	\$ 114.20	\$ 19.03	New Patients: 0
Patient Visits = Yes:	1	\$ 114.20	\$ 114.20	Patients: 53
Patient Visits = No:	0	\$ 0.00	\$ 0.00	
Patients Invoiced:	1	\$ 114.20	\$ 114.20	

- Client Only Invoices represents all the invoices that were concluded during the period listed on the Summary Report where the Client Only Selected was chosen for the invoice. This means the invoiced Services were to the client instead of a specific patient.
- Patient Invoices represents all the invoices that were concluded during the period list on the Summary Report where the patient or patients were entered. For example, you declawed all four paws of the client's two kittens; you would have both kittens' name listed on the invoice.

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- Invoices is the specific value DATAlink needs for the Total Number of Client Invoices from the Impromed Summary Report. Invoices represents all the invoices concluded during the selected date range for the report.
- Patient Visit = YES is the specific value DATAlink needs for the Total Number of Patient Invoices and Revenue from the Impromed Summary Report. It represents all the invoices that were concluded during the period listed on the Summary Report where the cashier concluding the invoice did not uncheck Patient Visit on the Conclude Invoice Screen. For example, the client brought their pet in for vaccines.
- Patient Visit = NO represents all the invoices that were concluded during the period listed on the Summary Report where the cashier concluding the invoice did uncheck Patient Visit on the Conclude Invoice Screen. For example, the client purchased prescription diet food but the pet was not seen by anyone.
- Patients Invoiced represents all patients invoiced, including multiple patients on the same invoice. For example, you have two kittens listed on the invoice.
- New Clients equals the total number of new clients added to the Client Database File. \*
- Clients equals the total number of client records in the Client Database File.
- New Patients equals the total number of news pets added to the Patient Database File from both new clients and existing clients.
- Patients equals the total number of patient records in the Patient Database File.

## Section Option: Product Types

The Summary Report will display the revenue based upon the Section Option selected in the Report Options. For VMG reporting, this report shows the break down by Product Types. The names of every Product Type sold are listed along with the amount of money collected for each.

PRODUCT TYPES			
NAME	AMOUNT	NAME	AMOUNT
5001 Vaccines:	\$ 581.90	5020 Hosp & Treatment:	\$ 99.00
5070 Alt & Comp Medicine:	\$ 104.16	5301 In-House Lab:	\$ 855.80
5802 Pet Supplies Retail:	\$ 200.00	5815 Pet Supplies:	\$ 58.19
Products Subtotal:	\$ 1,899.05		
- Billing Fees Charged:	\$ 0.00		
Products Total:	\$ 1,899.05		







If an invoice was concluded with a Service that had the Product Type “Vaccinations” but on the same day the Product Type, Vaccinations, was deleted and replaced with “5001 Vaccines”, both the old and new Product Types show up on the Summary Report the same day.

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## Printing a Report

If you need to print other reports, the following steps have been provided to help you through the process.

From the Desktop:

1. Click  or  > **Modules > Reports.**
2. To print:
  - a. A pre-selected list of reports, select the appropriate report list using the **Report List Name** drop-down.
  - b. Individual reports, expand the report group(s) then click the check box next to the report(s) to print.
3. Click **Print.** A dialog box containing print defaults for the selected report opens.
4. Enter the desired date range, if prompted, and click **OK** to continue.
5. When all defaults have been set, click **OK.** If multiple reports are selected, the next default dialog box will open. Continue setting report defaults, as necessary.
6. The report(s) print to the designated printer.



You may view reports on-screen prior to printing by clicking the **Preview** button.

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## Exporting a Report

To export a report you will need to follow similar steps as if you were printing, but there are a few differences which have been detailed below.

With the Reports module open on the Desktop:

1. Select the report(s).
2. When all defaults have been set, click **Preview.**
3. Click **Export.** The *Export Report To File* dialog box opens.
4. Navigate to the location to save the file.
5. Enter a **File Name.**

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6. Select the **Save as Type** as either a PDF or CSV (Comma Separated Value).<sup>1</sup>
7. Click **Save**.

## E-mailing a Report

To e-mail a report, follow similar steps as if you were exporting, but there are a few differences which have been detailed below.



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**Your Impromed Practice Management Software must be configured to send emails for this option to work.**

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With the Reports module open on the Desktop:

1. Follow steps **1 - 2** from **Exporting a Report**.
2. Click **E-mail**. The report is attached as a PDF file.
3. Select the **E-mail Template**, if desired.
4. Enter a **To** e-mail address.
5. Enter a **Subject**.
6. Enter any message in the Body area of the e-mail.
7. When ready, click **Send**.

## Database Statistics

Various Database Statistics can be displayed within the Patient Processing module of Impromed or Impromed Equine programs. These statistics may also be of value when entering data into the VMG DATAlink Companion Revenue. View client and patient statistics including totals based on client and patient types, patient age, number of visits, total sales, and average sales.

- General - Client/Patient Info - Viewing the client and patient information displays the database record and averages in a grid view.
- Species - Clients Owning - Views the number of clients that own the species in either grid or chart views. If they own one dog and one cat, the client is included within both totals.
- Species - Patient Counts - Displays the patient totals per species and also breaks them into the appropriate age bracket in either the grid or chart views.



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<sup>1</sup> Impromed recommends using one of these two formats to maintain the views of the data.

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- Species - Vaccine Counts - Displays the vaccine information per species and within time frames in the grid view. For example, Due, Up-to-date, and Overdue.
- Species - Sales - Displays the Total Visits, Sales, and Average Sales Per Visit for the selected date range in either a grid or chart view.
- Sex Codes - Patient Counts - Displays the total count of patients for each sex within each species. The totals are also broken out into age brackets and can be displayed within the grid or chart views.

To view the Database Statistics:

1. Click  or  > **Modules > Patient Processing.**
2. Click **Clinic Information** (or Clinic Info).
3. Click **View DB Statistics.**

Item	Client's	Patient's
Total Records	54	125
Total Marked Inactive	2	8
Total Marked Active	52	117
Records Added		
Today	0	0
Yesterday	0	0
This Week	0	0
Last Week	0	0
This Month	0	0
Last Month	0	0
This Year	0	0
Last Year	1	2
Average Number of Invoices This Year	1.00	0.67
Average Number of Invoices	15.61	6.32
Average Product Sold This Year	\$ 39.87	\$ 39.87
Average Product Sold	\$ 49.39	\$ 55.85
Average Invoice Total This Year	\$ 119.62	\$ 119.62
Average Invoice Total	\$ 127.23	\$ 162.59
Average Client Revenue This Year	\$ 119.62	\$ 79.75
Average Client Revenue	\$ 1,777.86	\$ 1,026.87

## Statistical Items

From the Statistical Items drop-down list, view database statistics for the following:

- General - Client/Patient Info
- Species - Clients Owning
- Species - Patient Counts
- Species - Vaccine Counts
- Species - Sales
- Sex Codes - Patient Counts

## Print Database Statistics

With the information being viewed, right-click and click Preview. This provides an on-screen view of the information. From the Preview screen, print, export, or e-mail the information.



## Search and Sorts

Running a search may serve as another method to obtain more specific information about your database statistics. For example, performing a search for the number of active patients by species for the past two years.

If you do not have a search for this function already, follow the steps below to create one.

## Creating a Search

From the Desktop:



1. Click  or  > **Setup** > **Communications** > **Search Details**. The Setup Search Definitions dialog box opens.
2. Choose **Create** for **Mode**.
3. Enter a name for the definition.
4. Enter a description for the definition.
5. Define the **Criteria**:





9. Click **OK** to save the search definition and close the dialog box.

## Copying a Search



To save steps, operators have the option to copy an existing search and pre-select the species, if desired. Below are the steps to copy a search definition.

1. Click  or  > **Setup > Communications > Search Details**. The Setup Search Definitions dialog box opens.
2. Select the search to copy and click **Copy**.
3. Enter a name for the new search.
4. Click **Edit** mode to make any necessary modifications to your search.
5. Click **Apply** to save the changes.
6. Repeat these steps for all searches you want to create off the first one.

## Performing Your Search

1. Click  or  > **Communications > Perform Search**. The Perform Search dialog box opens displaying a list of all search definitions that have been set up.
2. Click the search definition to run.
3. Click **Perform Search**. If the selected search definition does not contain any fields with variables the search status bar will display when your search has completed. If the selected search definition does contain fields with variables, the **Values for Search** dialog box opens with those fields highlighted.
4. Enter the appropriate values for each highlighted field. Clicking in some fields displays a drop-down arrow with selections to choose from. Other cells may require that you double-click the cell and type the required information.
5. Click **OK**. The Perform Search dialog box returns indicating the status of the search.
6. Click **Close**.

To review the results:

1. Click  or  > **Communications > Print Reports**.
2. Select the **Master Client/Patient** Report template. This report template will return the number of active clients selected and patients matching the selected species.

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Template Name:	Starting Report Item:	Ending Report Item:				
Master Client-Patient Report	1	33				
<input checked="" type="checkbox"/>	Name	User Name	Selection Date	Records Selected	Clients	Patients
	VMG - Active Pets	Owner/DM	Apr 21, 2023	33	26	33

To view/print a report for each species, rerun the search again using another species.

For all active clients, you can run the search labeled C-All Active Clients and enter the date to begin the search.



For more examples of searches, refer to the [“Appendix B: Additional Searches”](#) on page 34.

## Inventory Category Totals Report

DATALink also only needs business' total inventory value at the quarter end for DATALink submissions. The Inventory Category Totals Report reflects the inventory value a business has on hand the moment the report is run. The report prints the inventory category, category abbreviation, current quantity on hand, current cost of inventory, period selected, quantity sold, and cost of goods sold.

For Covetrus ordering, look at [www.intelligentinventory.com](http://www.intelligentinventory.com); Intelligent Inventory can help keep your On Hand and Cost Values accurate. Using Intelligent Inventory with your Improved Software does allow you to maintain your List Price and Discounted Acquisition Price to be maintained together.

The report options are:

- **Practices** - Allows operators to select a single practice/business or multiple practices/businesses.
- **Starting / Ending Category** - Prints selected or all inventory categories.
- **Print Totals For** - Selects the year(s) to print the report for. If the end of year is being run, operators will want to run this report for the current year prior to advancing the date.
- **Cost Method used during report** - An inventory lot is created when a Receipt of Items is completed. The costs on this report are based on the cost associated with the lot the inventory item was pulled from. Each method below uses the receipt date from the Receipt of Items to determine which lot to pull from. Every time an inventory item is invoiced out, it pulls from inventory using all of the following methods. The report will then use the selected method to total the records for the selected time. On the next page there are examples with explanations for each method available; LIFO, FIFO, SPID, and Weighted Average.

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- **Print Monthly Totals** - Breaks down each month for each category with the totals for that month based on the cost method used.

## Inventory Category Totals Report - FIFO

First In First Out (FIFO) - Cost is calculated from the first receipts entered in the system because they are the first lots to be pulled from.

NAME	ABBREV.	CURRENT QTY ON HAND	CURRENT COST OF INVENTORY	PERIOD	QTY SOLD	COST OF GOODS SOLD
Anti-Inflam/Histamine Meds	ANTI-INFL	9133.7000	\$ -11301.3179	Total For 2023	0.0000	\$ 0.0000
Antibiotic/Antibacterial Meds	ANTIB	9045.0000	\$ 4435.9874	Total For 2023	0.0000	\$ 0.0000
Antidotes/Therapies for Toxins	TOXINS	0.0000	\$ 0.0000			
Antifungal Agents	ANTIF	-14.0000	\$ -3.0632			
Antiparasitics/Antiprotozoals	ANTIP	778.7000	\$ 5261.8172			
Behavior Modifiers	BEHAVE	-13.6600	\$ -1.1710			
Blood/Blood-Forming Units	BLOOD	0.0000	\$ 0.0000			

## Inventory Category Totals Report - LIFO

Last In First Out (LIFO) - Cost is calculated from the last receipts entered in the system because they are the first lots to be pulled from.

NAME	ABBREV.	CURRENT QTY ON HAND	CURRENT COST OF INVENTORY	PERIOD	QTY SOLD	COST OF GOODS SOLD
Anti-Inflam/Histamine Meds	ANTI-INFL	9133.7000	\$ -11318.2069	Total For 2023	0.0000	\$ 0.0000
Antibiotic/Antibacterial Meds	ANTIB	9045.0000	\$ 4435.9874	Total For 2023	0.0000	\$ 0.0000
Antidotes/Therapies for Toxins	TOXINS	0.0000	\$ 0.0000			
Antifungal Agents	ANTIF	-14.0000	\$ -3.0632			
Antiparasitics/Antiprotozoals	ANTIP	778.7000	\$ 5258.3231			
Behavior Modifiers	BEHAVE	-13.6600	\$ -1.1710			
Blood/Blood-Forming Units	BLOOD	0.0000	\$ 0.0000			



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## [Inventory Category Totals Report - Specific ID](#)

Specific ID (SPID) - Calculates cost based on the lots inventory was actually pulled from according to the Inventory Usage method selected for the practice/business.

NAME	ABBREV.	CURRENT QTY ON HAND	CURRENT COST OF INVENTORY	PERIOD	QTY SOLD	COST OF GOODS SOLD
Anti-Inflam/Histamine Meds	ANTI-INFL	9133.7000	\$ -11301.3179	Total For 2023	0.0000	\$ 0.0000
Antibiotic/Antibacterial Meds	ANTIB	9045.0000	\$ 4435.9874	Total For 2023	0.0000	\$ 0.0000
Antidotes/Therapies for Toxins	TOXINS	0.0000	\$ 0.0000			
Antifungal Agents	ANTIF	-14.0000	\$ -3.0632			
Antiparasitics/Antiprotozoals	ANTIP	778.7000	\$ 5261.8172			
Behavior Modifiers	BEHAVE	-13.6600	\$ -1.1710			
Blood/Blood-Forming Units	BLOOD	0.0000	\$ 0.0000			

Impromed highly recommends running all Inventory Reports using the **Specific ID** where it can be selected. This gives you the most accurate and to-date information on your inventory.

## [Inventory Category Totals Report - Weighted Average](#)

Weighted Average - Uses an average cost based on the costs in the Specific ID method records.

NAME	ABBREV.	CURRENT QTY ON HAND	CURRENT COST OF INVENTORY	PERIOD	QTY SOLD	COST OF GOODS SOLD
Anti-Inflam/Histamine Meds	ANTI-INFL	9251.1500	\$ -11362.3083	Total For 2023	0.0000	\$ 0.0000
Antibiotic/Antibacterial Meds	ANTIB	9081.0000	\$ 4513.0239	Total For 2023	0.0000	\$ 0.0000
Antidotes/Therapies for Toxins	TOXINS	0.0000	\$ 0.0000			
Antifungal Agents	ANTIF	0.0000	\$ 0.0000			
Antiparasitics/Antiprotozoals	ANTIP	918.0000	\$ 5695.6107			
Behavior Modifiers	BEHAVE	0.0000	\$ 0.0000			
Blood/Blood-Forming Units	BLOOD	0.0000	\$ 0.0000			

## Appendix B: Additional Searches

Below are examples of additional search and sorts:

### Clients Seen This Year

Setup Search Definitions (Edit)

Search Definition:  \*VMG - Clients Seen This Year

Description: Clients seen this year. Change the year in Field or Value column.

Criteria | Output Items | Sort Order

(	Table	Field	Operator	Table or 'Value'	Field or value	)	And/Or
	Pat. Product 1	Date Performed	>=	(Value)	1/1/2015		And
	Pat. Product 1	Date Performed	<=	(Value)	12/31/2015		

Insert Row(s) | Delete Row(s)

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

Mode:  
 View  
 Edit  
 Create

OK  
Cancel  
Apply  
Copy  
Delete

Criteria | **Output Items** | Sort Order

Items to include in output:

Client  
 Patient  
 Reminder

Criteria | Output Items | **Sort Order**

Table	Field	Order
Client	Last Name	Ascending
Client	First Name	Ascending
Patient	Patient Name	Ascending





## Enhanced Reports

The following reports can be run in Impromed (Infinity) 5.2 and higher or Impromed Equine (Triple Crown) 3.2 and higher from the Enhanced Reports module.

1. Click  or  > Module > Reports (Enhanced).



New reports are introduced in each new software release. As of this writing, some reports listed here may not be available in your version. Contact Impromed's Update Team about updating your Impromed Practice Management Software to the newest version released.

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- **Total Revenue of New Clients Per Year**  
Shows total revenue for all clients with a first visit date for the selected year.
- **Total Revenue of Repeat Clients Per Year**  
Displays total revenue of all clients who have visited more than once during the same year.
- **Total Revenue of Returning Client Per Year**  
Displays total revenue for all clients who have had a visit date during the year selected and the previous year.