

Back on Track – Recovering Lost Revenue & Care Plan Management

RxWorks





- Health Plans are a vital part of any Veterinary practice. Not only do they help Clients manage continuous care for their animals, but it creates a bond between Client and Practice. This helps to keep a steady base line of revenue coming in.
- From the Task Panel click Options & Setup.
- Click Item then Manage Care Plans.

 For each Care Plan, click on the pencil icon to open/edit the Care Plan.

• Click Components.

- C	VISIC	Income Groups for Financial Reporting	
-		 Minimum Fee Levels 	
D	Finance	General Ledger Account Interface	
1	Clipboard	Discount Schemes	
I E	& Imaging	Schedules	
2	Counter	Online Scheduled Drug Register	
F	Sale		
า	Deport &	Patient Care Plans	
G	Reminder	Manage Care Plans	
		Care Plan Categories	
	Item	Global Settings	
		<u> </u>	
	User	Drug Labels	
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· ·	Cimic	Setup Assistance: Item (Fees)	
		This section maintains Options for Fee Items. Specific help is invoked when mouse is over one of the topics. More detailed assistance is available when you	
		select the topic.	
		Care Plans	l
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	Lategoi	100	

🔒 🗛 Client

😤 🔋 Patient

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Item Options

Item Categories and Stock Control Item Markup Groups

Name	Category	Rules	Status	Effective Dates	Initial Cost	Recurring Cost	Rend
Dog <10kg	Healthy Pet Scheme		Active	29/05/2019 to 29/11/2029	£10.00	£10.00 per month	~
Dog >10kg	TEST PLAN		Active	29/05/2019 to 29/11/2029	£10.00	£10.00 per month	~
HPS - Small D <10kg	log Healthy Pet Scheme		Active	From 01/08/2018	£10.00	£10.00 per month	~
Healthy Pet C Puppy	lub Healthy Pet club		Active	From 05/02/2020	£50.00	£10.00 per month	~
Kitten Club	Healthy Pet Scheme		Active	21/02/2020 to 21/02/2021	£30.00	£30.00 per month	
LTM Diabetic	Long Term Med		Active	From 07/05/2020	£0.00	None	

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- The components displayed are all the • individual elements that make up the Health Plan, i.e. Vaccinations, Flea and Wormers, Additional discount etc.
- Click Charge Filters. •

- _ 🗆 🗙 The Charge Filter will display the list of • products and/or services that have been added to the health plan discount. ID:9 •
 - If you need to add additional products or services, click Add next to the relevant charge filter criteria.
 - Click Done when you have finished. •
 - Click Save after any changes have been • made.

Work through each of the Care Plans to • ensure your most up to date products and services are included in the setup.



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How to Report on Care Plans

• From the Task Panel click Query & Mailings.



	Reports					
O o Search	1. Select Listing Patient Details					
A Till Reconciliation & Banking	2. Build Selection Criteria					
🖳 🛚 Accounts, Debtors & Tax	Client ● Patient ○ Consult ○ Financial Patient Has an Active Care Plan					
C Price Lists & Inventory Control	Restrictions	ADD Open Saved				
Reminders & Statistics	Payers has an Autor Care Harris and	Delete Line				
💋 🛯 Financial & Statistical Analysis		()				
🔍 🗉 Queries, Mail Merges & Listing	Include deactivated items	6 results found.				
G Excel Analysis		Execute				
H Setup & Document Editing	3. Select Output Style					
Scripting & Batch	● 🕾 Report Listing O 🗷 Word Mail Merge O 🗷 Spreadsheet O 🖞 Send SMS O 🔊 Send Email					
J Advanced Analysis	petient list-custom fields					

- Using Queries, Mail Merges & Listings, you can create a query to bring a list of all Patients that are on a Care Plan.
- In this example, I have asked the system to show all Patients that have an Active Care Plan, but you have the option to include Pending Care Plan too if you have any.
- Click **Execute** once you have added in all the criteria you need.
- Select the output method you would like such as PDF / Excel or to send an SMS or Email.

8	Reports					
ዖ o Search	1. Select Listing Client Details					
A Till Reconciliation & Banking	2. Build Selection Criteria					
B Accounts, Debtors & Tax	Client ®Patient ○ Consult ○ Financial Vaccinations - Leptopirouis Next Due-4All Species> ✓					
C Price Lists & Inventory Control	less than or equal to v 01/05/2020 v ADD Restrictions Open Saved					
Reminders & Statistics	PoterHas an Active Core Plan is true Armel Cough Nex Obser Plan is true Karmel Cough Nex Obser Plan Clear All Clear Al					
🗹 🛿 Financial & Statistical Analysis	Cabookuross Liev Dea Ranes and readers on all at para					
🔤 📧 Queries, Mail Merges & Listings	Include deactivated items AND OR OR Save					
🥿 🛚 Excel Analysis	Execute					
🖇 H Setup & Document Editing	3. Select Output Style					
🔤 🛯 Scripting & Batch	🧏 Report Listing 이팬 Word Mail Merge 이팬 Spreadsheet 🖲 🖥 Send SMS 이 🖉 Send Email					
J Advanced Analysis	Senter SMS Template Template V VClents will be messaged if they have phone type set to SMS' Use "Clent > Allow' selection criteria above to restrict further.					

- You can use the query builder to make the query as basic or as complex as you would like. The more layers you add to the query, you will start to see the use of AND or OR appearing.
- Remember to click **Execute** if you add a new line to the query to refresh your results.



How to use Recalls & Reminders via Queries

- ٥. Select Listing A Till Reconciliation & Banking 2. Build Selection Criteria Client
 Patient
 Consult
 Financial Accounts, Debtors & Tax ADD Price Lists & Inventory Contro A. Reminders & Statistics 🗹 🛯 Financial & Statistical Ar Queries, Mail Merges & Listings ×. 🖉 📕 Setup & Document Editing 3. Select Output Style 🖲 🔁 Report Listing 🔿 👿 Word Mail Merge 🔿 🗷 Spreadsheet 🔿 着 Send SMS 🔿 🈂 Send Email Scripting & Batch 🖉 Proview | 🎯 Print | 🧔 Sotup J Advanced Analysis
- 3. Select Output Style

 Seport Listing I Word Mail Merge I Spreadsheet 🛱 Send SMS 🗟 Send Email

 Send Selected SMS Template

 Template

 V

 Uclients will be messaged if they have phone type set to 'SMS'. Use 'Client > Allow...' selection criteria above to restrict further.

• If you use **Recalls**, you can use the query builder to search for these too.

- You can use the query builder to contact your Clients using a variety of methods:
- Excel Spreadsheet to upload to a third party to send out communications.
- Word Mail Merge to generate a document to post to all your Clients.
- Send SMS or Email to communicate directly from RxWorks to your Clients.

How to Run Revenue Reports

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	🔎 o Search	🖉 Preview 🎒 Print 🕼	Export 🗷 Excel 📆 PDF 🤻 Flag 🌛 Setup 📢 Tags Cancel		
	Till Reconciliation & Banking	This cross tab report allows revenue month, species, account type. For e default, the values in the report are	e from sales to be broken down by many different options, such as service heading, user, clinic, ach breakdown, the total revenue, average per invoice or consult and number of consults. By shown without tax.	sales li compa	om re la
	Accounts, Debtors & Tax	Date Range	Other 01/05/2020 * 31/05/2020 *	oompa	
	C Price Lists & Inventory Control	Restrictions Crosstab restrictions	Senire V V 🛤 (down the name)	 You ca 	n vi
	Reminders & Statistics		Species v III (down interpage) All Charge Values v III (across the page)	Excel o	lepe
	🗹 🗉 Financial & Statistical Analysis	Client Number	v 🚸 (restictions)	proces	s ṫh
	🔍 F Queries, Mail Merges & Listings	Options	p		
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	🔮 📕 Setup & Document Editing	Calculate averages for	Invoices Consultations		
	😂 I Scripting & Batch	Include Tax	Exclude zero involces 🐱		
	J Advanced Analysis				
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1			Production Penort) on
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Report for extended analysis of production.

Advanced Analysis

- The **E3** report can be used to generate sales from certain time periods, i.e. compare last year to this year.
- You can view the results in either PDF or Excel depending on how to would like to process the information.

• From Reports, Advanced Analysis, click Production Report. (Requires Level 9 Reports Security)



_ 0 X Start Dat 01/05/2020 End Date View Report Vet by Consultation Show by Display Sale Pric Break D Yes Clinic Name Evergree Service Type Hospital, 🗸 Use Vet Profile No Incl Deactivated Us Yes ~ Post Mortem, Promotions, Acup V Consulting Vet Cathy Masters, East, Fee Maint 🗸 Service Species Category CI Account Type Staff, Special Payment Terms, Species Category Cost Centre IStandard, Out of clinic, Emerge 🗸 Transaction Type Settlement Discount, Bad Debt 🗸 4 of ▶ ▶ | + ⊛ @ | @ 🗐 🕮 ₩,- | 100% Find Next

19/05/2020

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Month Net of 100

View Report

- It allows you to enter in various criteria such as specific staff / service headings / transaction types / date range etc.
- You can have multiple versions of the report open at any one time so if you would like to have one comparing 2019 to 2020 for instance, just click on **Production Report** twice for it to load two windows.
- Here is an example of how the data would look.
- You can use the + symbol to expand individual service headings / staff / species etc. depending on your criteria.

• From Reports, Excel Analysis, scroll down to Products and Services and click on Top Fee Sales.

- This report will show you your top sales products and services from the time criteria you set.
- This can help show you what generated most revenue in that given period.

Consulting Vet	Cathy Masters, East	t, Fee Maint ∨	Service	Post Mortem, F	Promotions, Acup 👻		
Species Category	Species Category	¥	CI Account Type	Staff, Special I	Payment Terms.		
Cost Centre	Standard, Out of cl	inic, Emergi 🗸	Transaction Type	Settlement Dis	count, Bad Debt 👻	~	
14 4 5 of 1	4 🕨 🎽 🖉 🐵	۵ 🖨 🖬 🖬	₩. • 100%	•	Find Nex	t	
Production By Production create Period : 1/1/2020	Consultation d by: All Users to 5/19/2020	Vet by Procee	lure Service Hea	ading - Mon	thly		
Service		Total		Feb-20	20	Mar-20	20
B		Units	Net of Tax	Units	Net of Tax	Units	Net of
Total		135.00	2,543.31	10.00	170.05	53.00	1,980
E Anaesthesia		20.00	771.32	0.00	0.00	20.00	771
Anaesthesia	Induction	4.00	253.23	0.00	0.00	4.00	253
Anaesthesia 15 Mins	Maintenance Per	12.00	488.45	0.00	0.00	12.00	488
Pre Anaesth	etic Evaluation	4.00	29.64	0.00	0.00	4.00	29
Consultation		3.00	147.68	2.00	98.45	0.00	0
Consumables		21.00	9.29	0.00	0.00	0.00	0
Discount		9.00	-227.88	2.00	-92.16	3.00	-127
E Flea, Worm & T	ick Preparations	5.00	218.55	2.00	92.46	0.00	0
E Foods, Nutrition	& Supplements	3.00	226.77	1.00	56.41	1.00	127
E Hospital & Nursi	ing Care	4.00	116.77	0.00	0.00	4.00	116
E Inventory Packs		8.00	93.87	0.00	0.00	8.00	93

01/01/2020

Consultation

Yes

Evergree

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Fod Date

Show by

Display

Service Type

Start Date

Vet by

Break D

Clinic Name

Use Vet Pro

Patient Care Plan 🔊 🔋 Accounts, Debtors & Tax Onregistered Plans C Price Lists & Inventory Control Products and Services Ouplicate Stock Order Codes Θ Reminders & Statistics Last Fee Sale ⊖ Multi Component Items Multiple Stock Order Codes for Supplier Financial & Statistical Analysis Procedure Price List Purchase Analysis By Category Queries, Mail Merges & Listings Stock Ideal and Critical Level Summary Θ Stock Purchase Itemised Summary Supplier List Excel Analysis Top Fee Sales Variable Fee Price Changes H Setup & Document Editing Referrals

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,o	♀ ₀ Search		Top Fee Sales				
			Excel CSV Cancel				
ã		Till Reconciliation & Banking	Transaction Date	Last Account Period V 01/01/2020 V 31/01/2020 V			
P	A Annual Dalation D. Tau	Accounts Debtors & Tay	Number of Results to Show	10			
Г		Accounts, Debtors & Tax	Restrict to Service Heading	~ v			
		Price Lists & Inventory Control	No Category Restrictions				
		Reminders & Statistics	O Restrict To Category	Income Group Categories V	(rame) (value)		
			Only Include Stock Controlled Items?	×.			
⊡ [Financial & Statistical Analysis	Include Deactivated Items?				
٩		Queries, Mail Merges & Listings	This report will show your top fee sales. You must enter a date Grouping levels are available in the report to categorize the re Units sold.	range and the number of results you wish t sults, and you can choose to base on Numb	o see (maximum of 255 items). er of Consultations or Number of		
×	G	Excel Analysis					
Ĩ	н	Setup & Document Editing					