



Multi-Business Guide



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Overview

Covetrus® provides a total practice solution in which a single database can contain multiple business entities. The ImproMed Practice Management Software provides a multi-business solution which allows operators to share a common database, accounts receivable, products, and medical record history while still maintaining unique inventory levels, financial reporting, boarding reservations, and appointment scheduling. One of the greatest benefits to businesses using ImproMed's multi-business feature is that a client is able to visit any business in the group and have all of their information, both medical and financial, available to the staff.

Here are some examples of multi-business configurations:

- Multiple physical locations owned by the same business.
- Multiple businesses under one roof.

For example, a veterinary business and a retail or boarding facility sharing a building.

- Veterinary businesses that operate during daytime hours and emergency businesses that operate outside of those hours.
- Veterinary facilities that house multiple specialties.

For example, Oncology, Dermatology, Neurology, etc.

Let's clarify some terms to help ensure complete understanding of the information in this document. A database is defined as the collection of all information related to the operation of the veterinary business; including clients, patients, accounts receivable, product and inventory lists, etc.

A business is defined as a unique business entity within the ImproMed database. When ImproMed has multiple businesses, the first business created with the database is the master. Each business generated after the initial business is a subsequent business. The master has full control over everything in all businesses, but certain items do have business level controls available to them.

A product is defined as anything sold by a business. This includes services and inventory items. To help manage multiple businesses, ImproMed offers the Multi-Business Maintenance Utility. This utility allows setup changes to be made at one business and duplicated into other businesses. The Multi-Business Maintenance Utility also has tools designed to help monitor cash flow and inventory shared between businesses.

The following choices are available for creating a subsequent business:

- A new business can be created from within the ImproMed program at any time.
- Covetrus can create a business through its data conversion services.

How do Multi-Businesses work?

The ImproMed database is housed on a dedicated server at the main location. Each subsequent business is part of this database.

All computers, Tablet PC's, and/or laptops at the main business, as well as any subsequent business at the same location, will have ImproMed loaded on them and access the program through a Local Area Network (LAN). Any other subsequent business at a different physical location will utilize a Remote Desktop Connection through that location's Internet connection to access and run ImproMed from the main business. For more details on remote connections, please review [ImproMed's Hardware Specifications](#).

While opening ImproMed, your staff will be presented with a choice of which business to log into. Each business maintains its own set of financial reports, employee production, employee commission schedules, appointment schedules, pricing, inventory control, and many other system attributes. All businesses share clients, patients, accounts receivable, medical records, product and inventory lists, and other system attributes and behaviors. ImproMed's multi-business solution consolidates critical client, patient, and setup information, and maintains unique settings where they are needed.

As an example, an employee exists in each business and uses the same name and employee ID throughout the system. Within each individual business, the employee can either be listed as available or not available. A status of not available simply means the employee cannot be used as a provider of products and services within that business, but can be used by the other businesses where they are available. Likewise, an employee may have a commission schedule that details the commission rates the employee is entitled to. An employee in this scenario could have several distinct commission schedules depending on which business they are logged into when they perform transactions. This takes us to how ImproMed's multi-business configuration handles financial data, pricing, and reporting.

One of the benefits of using multi-businesses in ImproMed is the ability to separate key components like pricing and production, and report their values per business. When an employee provides a service at the master business, the production for that employee is recorded as a part of the master business. If that same employee worked at a subsequent business, the production for that employee would be recorded at the subsequent business. At the end of the month, reports can be generated for each business to show the production of employees at each business in which they worked. Reports can also be generated to show totals for employees across multiple businesses. To take this tracking a bit further, we can also address how employee commissions are handled.

Because ImproMed tracks production within each business, and ImproMed maintains the commission schedule for employees within each business, it is possible to evaluate and pay employees based on their actual production at each business. Likewise, it is possible to pay different commission rates per business, per employee. A great example for this is how emergency practices handle commissions. Many businesses provide greater compensation as an incentive for taking emergency calls, which are often inconvenient. Pricing also plays an important role at emergency practices. Because ImproMed maintains pricing per

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business, an emergency practice can have prices that are higher than the rest of the businesses and the staff does not have to do anything different. Remember, product and inventory lists are the same at all the businesses, but the pricing and behaviors of those items can be unique to the business in which they are used.

The last item that needs to be discussed is inventory. Inventory counts are maintained per business. When multiple businesses reside in different physical locations, each business typically has its own wants and needs for their inventory. Businesses that share facilities and inventory have their own unique inventory challenges. ImproMed provides the Multi-Business Maintenance Tool to assist with reconciling inventory and maintaining consistency from one business to the next. It also allows for inventory counts to be adjusted based on the actual usage of inventory in a subsequent business.

As we move away from the handling of employees, commissions, production, and other items that are unique to each business, we can focus on the end result for the client and business. ImproMed maintains a single accounts receivable for each client and a single medical record for each patient. The consolidation of client financial information helps the business manage outstanding accounts receivable by providing the balance due to all businesses and delivering a single, unified statement to the client when monthly bills are generated.

The medical records for patients are handled in the same way. Regardless of the business in which the medical care was provided, a patient's medical record includes everything that is part of the patient's care. The medical staff can view a complete account of the patient's history from any business, not just the entries made at the business they reside at. In much the same way, we can apply this concept to how invoicing functions. When charges are entered, those charges sit on an open invoice for that business and can be viewed (but not modified) by the other businesses. When the client is ready to be checked out, it is possible to consolidate the charges from all of the businesses into a single invoice for the client. A good example of this is an emergency case. If care is provided to a patient during emergency hours and that patient is transferred to another business during the day, charges are entered under the appropriate business with the desired price structure. At the end of the day, the client is given one invoice with all of the appropriate information and charges provided.

These are just a few of the key points associated with multi-business implementations of the ImproMed Practice Management Software. There are many solutions that can be delivered by ImproMed for businesses with multiple locations or multiple business entities within a single location.

If questions remain about using multi-businesses in the ImproMed Practice Management Software, please do not hesitate to contact an ImproMed System Specialist.

Master Business Functionality

The Master Business has several distinct attributes. First, it is the business on which all subsequent businesses are created from, and, to a certain extent, are dependent upon. Second, the Master Business assumes the responsibility for maintaining consistency across all businesses in terms of the look and feel of communications between any business and its clients. Lastly, and most important, is the Master Business' role of standardizing the Product and Inventory lists. By controlling these key items, the Master Business insures that any report concerning revenue, employee production, or business analysis will be consistent regardless of which business(es) are being evaluated. This controlled consistency lays the foundation on which ImproMed's multi-business solution lies. Once a new product or inventory item is created by the Master Business, each subsequent business has the ability to make that item available.

When a subsequent business is created the following will be automatically included in the new business:

- Product List - Includes all services and retail items that are sold.
- Product Attachments - Includes anything updated by the sale or use of a product (reminder dates, prescription information, medical record forms, etc.).
- Inventory List - Includes all of the items in the master business inventory lists.
- Communication and Medical Record Print Templates.
- Certificate Templates.
- Take Home Templates.
- Payment Methods.

When the product and inventory lists are copied, any product item that is linked to the inventory will maintain the links from the Master Business. The employees will also be in all businesses with the ability to make any desired employee(s) available for use per business. Any Communication and Medical Record Print Templates within the Master Business the subsequent businesses will only be able to create or edit the main template. Any template header, body, and/or footer will be controlled by the Master Business. Additionally, the Take Home Instruction templates are also controlled by the Master Business.

This is a list of items that are controlled by the Master Business:

- Client/Patient Database
 - ◇ Client Record Layout
 - ◇ Patient Record Layout
- Take Home Instructions
 - ◇ Template Options
- Medical Records
 - ◇ Global Medical Record Settings
 - ◇ Terms Diagnosis/Problem Links
 - ◇ VetNotes Diagnosis/Problem Links

Subsequent Business Functionality

Before a subsequent business is created, operators will want to go through the product and inventory lists, payment methods, communication templates, and medical record print templates to ensure that the correct information is ready for the new business. Once the new business is created, a few of the following items will need to be configured:

- **Operators** - Operators pull from the list of employees. Therefore, every staff member should be created as an employee.
- **Security** - Assign employees from each business to a security group with appropriate rights to areas of ImproMed.
- **Report Lists** - A way to print multiple reports at once (i.e. End of Day).
- **Reports Security** - Each Desktop in ImproMed can be granted access to specific reports.
- **Estimate/Invoice Templates** - Templates used to customize how invoices/estimates are printed for that business' clientele.
- **Patient Processing Programs and Database View Settings** - Within the Patient Processing Module all of the programs available are per desktop, but can be imported to be the same as an existing business. The Dashboard View Settings work in the same fashion, but in more modules than just Patient Processing (i.e. Medical Records, Take Home Instructions, Certificates, etc.).
- **Boarding and EasyTime** - Can be setup to meet the specific needs for each business.
- **Product Spreadsheet** - Allows items to be modified en masse, but items cannot be removed from the product spreadsheet while in a subsequent business.

The following is a list of what can be viewed from a subsequent business' configuration:

- Accounts Receivable
 - ◇ Payment Plans
 - ◇ Statement Letters
 - ◇ Statement Templates
- Businesses
- Certificates
 - ◇ Certificates
- Communications
 - ◇ Export Templates
 - ◇ Formula Items
 - ◇ Report Formulas
- Inventory
 - ◇ Inventory Categories
- Labels
 - ◇ Printers

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- Medical Records
 - ◇ Custom Sort Orders
 - ◇ Diagnosis Categories
 - ◇ Document Export Templates
 - ◇ Forms
 - ◇ Lab History Sheets
 - ◇ Lab Screens
 - ◇ Macro Text
 - ◇ Macro Text Categories
 - ◇ Radiograph Areas
 - ◇ Radiograph Views
 - ◇ Templates
- Patient Processing
 - ◇ Discount Types
 - ◇ Discounts
 - ◇ Health Plans
- Prescriptions
 - ◇ Pharmacies
 - ◇ Remarks
 - ◇ Sig Codes
- Products
 - ◇ Categories
 - ◇ Profit Centers
 - ◇ Types
- Rechecks
 - ◇ Categories
 - ◇ Rechecks

- Take Home Instructions
 - ◇ Categories
 - ◇ Messages

The following is a list of what can be modified from a subsequent business' configuration:

- Workstation Preferences
- Inventory
 - ◇ Inventory Items
- Medical Records
 - ◇ Diagnoses
- Patient Processing
 - ◇ Payment Methods
 - ◇ Taxes
- Products
 - ◇ Product Items

The following is a list of what can be modified from a subsequent business, however, changes are made for all businesses:

- Accounts Receivable
 - ◇ Assign Templates
 - ◇ Global Options
- Client/Patient Database
 - ◇ Duplicate Client Warning Options
- Communications
 - ◇ Email Settings
- General Ledger Link
- Global Preferences

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- Lab Results Import
 - ◇ Dynamic Desktop Preference Options
 - ◇ AXIS-Q
- Rapport
 - ◇ Canned Messages
 - ◇ Phone Priorities for Voice and Text
 - ◇ Settings

The following templates are available for subsequent businesses to create, however, the maintenance of the actual template still resides within the Master Business:

- Communications
 - ◇ Letter Templates
 - ◇ Postcard Templates
 - ◇ Report Templates

The following is a list of what can be created from a subsequent business' configuration:

- Boarding
 - ◇ Assign Block Days
 - ◇ Block Days
 - ◇ Boarding Options
 - ◇ Cages
 - ◇ Status Types
 - ◇ Wards
- Certificates
 - ◇ Certificate Templates
 - ◇ Export Templates

- Client/Patient Database
 - ◇ Breeds
 - ◇ City, State
 - ◇ Client Types
 - ◇ Coat Colors
 - ◇ Copy Database Fields
 - ◇ Database Alerts
 - ◇ List Values
 - ◇ Pre-defined Client Alerts
 - ◇ Pre-defined Patient Alerts
 - ◇ Referral Sources
 - ◇ Reminders
 - ◇ Sex Pronouns
 - ◇ Species
 - ◇ Stables
 - ◇ Trainers
- Clinic Census
 - ◇ Locations
 - ◇ Options
 - ◇ Resources
 - ◇ Visit Reasons
- Clinic Schedule
- Communications
 - ◇ Block Senders
 - ◇ Email Address Book
 - ◇ Email Templates
 - ◇ Email Topics
 - ◇ Search Details

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- ◇ Appointment Call Path
- ◇ Vetstreet Options
- Desktop Preferences
- EasyTime
 - ◇ Assign Block Times
 - ◇ Block Times
 - ◇ Color Schemes
 - ◇ EasyTime Options
 - ◇ Resource Groups
 - ◇ Resources
 - ◇ Resources Display Order
 - ◇ Status Types
 - ◇ Visit Reasons
 - ◇ Visit Reasons Display Order
- Employees
 - ◇ Apply Work Schedules
 - ◇ Bundles
 - ◇ Commission Schedules
 - ◇ Employees
 - ◇ Groups
 - ◇ Spreadsheet
 - ◇ Work Schedules
- Episodes of Care
 - ◇ Canned Checklist
 - ◇ Settings
- Estimates
 - ◇ Canned Estimates
 - ◇ Consent Forms
- ◇ Groups
- ◇ Options
- ◇ Templates
- Global Icons
- Global Images
- GlobalVetLINK Web Service
- Inventory
 - ◇ Defaults
 - ◇ Options
 - ◇ Storage Locations
 - ◇ Vendors
- Invoicing
 - ◇ Receipt Templates
 - ◇ Templates
- Lab Results Import
 - ◇ Antech Requests
 - ◇ Field Reference Ranges
 - ◇ IDEXX VetLab Station (IVLS) Links
 - ◇ IDEXX Reference Lab Links
 - ◇ Lab Field Links
 - ◇ Lab Requests
 - ◇ Lab Results Paths
- Labels
 - ◇ Defaults
 - ◇ Groups
 - ◇ Lab+ Labels
 - ◇ Standard Label Page Layouts
 - ◇ Standard Labels

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- Medical Records
 - ◇ Desktop Preferences
 - ◇ Form Fields
 - ◇ SOAP Lab Fields
 - ◇ Terms
 - ◇ VetNotes
- Mobile Stations
- Patient Processing
 - ◇ Banks
 - ◇ Cash Drawers
 - ◇ SuperModes
- Pedigree
- Process Management
 - ◇ Pre-defined Tasks
 - ◇ Task Status Colors
- Products
 - ◇ Linked Products
 - ◇ Product Attachments
 - ◇ Timers
- Secured Items
- Security
- Take Home Instructions
 - ◇ Category Sort Order
- Time Management
 - ◇ Employees
 - ◇ Options
- Travel Sheets
- Treatment Plans
 - ◇ Activity Tasks
 - ◇ Canned Instances
 - ◇ Canned Treatment Plans
 - ◇ Monitoring Defaults
 - ◇ Monitoring Tasks
 - ◇ Sections
 - ◇ Settings
- Wellness Plans
 - ◇ Canned Wellness Plans
 - ◇ Settings

Multi-Business Maintenance Utility

With this tool, ImproMed operators can easily make changes to one business and then pass those changes on to any other business. This is beneficial because changes only need to be made once rather than multiple times between each business. There are five pages of options that will be discussed. Each page will be covered in detail. First, here is an idea of what changes can be made between businesses.

When using the Multi-Business Maintenance Utility, tasks on each page are performed separately from the others.

- Product settings and restrictions, including Sales Tax settings
- Inventory Settings and Cost
- Product Prices
- Product Attachments
- Moving Inventory
- Linked Products
- EasyTime Visit Reasons
- Employee Commission Schedules
- Accounts Receivable Adjustments
- Travel Sheets

Multi-Business Abilities

Each different multi-business scenario will dictate which of the following features will be used. Each scenario presents its own unique needs.

Scenario: A clinic with multiple physical locations will most likely take advantage of the ability to schedule appointments for each location, but may not choose to allow invoice items to be generated from other locations. A clinic that houses separate businesses may rely heavily on the invoicing features.

Multiple physical locations owned by the same business AND multiple businesses under one roof.

Scenario: A veterinary business and a retail or boarding facility sharing a building.

For both of the examples above, most businesses will use the EasyTime and Boarding modules to assist clients in making appointments or reservations for each other. In some cases they will conclude invoices, which if done, will include any balance owed for that client between all businesses.

Scenario: Veterinary businesses that operate during daytime hours and emergency businesses that operate outside of those hours.

For the example above, most will use the EasyTime Appointment Scheduler, Boarding, Invoicing, Estimates, Treatment Plans, Travel Sheets, and Compliance Lists in combination with each business.

Scenario: Veterinary facilities that house multiple specialties, for example, Oncology, Dermatology, Neurology, etc.

For the example above, invoicing will be the most common feature shared between businesses because of the ability to conclude an invoice for each business at once.

The EasyTime module is used for creating, viewing, and managing appointment schedules. The appointment schedule acts as the base of the veterinary business. By and large your business is controlled and dependent on customer service and efficient processing of your clients. EasyTime is a flexible and easy interface designed to provide you with an at-a-glance view of your business' obligations for the day. In addition, it also provides a quick and easy way to see when a sick patient can be squeezed in and it gives you the ability to manage your business' work flow.

The Boarding module provides a paperless, computerized method for managing a boarding facility. The module is used for creating, managing, and displaying patient reservations. The Boarding module has many powerful features. For instance, it can be used for managing reservations across multiple businesses. This allows you to view and create reservations for any business, regardless of the business where you are located.

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The invoicing portion of the ImproMed program is designed for the generation of paper invoices containing the products sold and the prices charged to the client. There are several locations in ImproMed where operators may add products to an invoice.

ImproMed's multi-business feature provides several key options when it comes time to handle the charges for the client's current visit. The first of these options centers around the ability to associate charges on the invoice to a specific business. Anywhere charges are entered, the Business Selector allows the operator to add products to the desired business. This selector defaults to the business the operator is currently logged in to, but can be changed, if needed. It is important to note that products can only be modified or deleted by the business they belong to. If a charge is added to the invoice for Business A from Business B, it is up to Business A to make any changes or to delete the item if it is incorrect. This feature is optional and is most often used in multi-business configurations that place multiple businesses under a single roof such as the multi-specialty referral center.

Also built into the invoicing capabilities of the multi-business solution is the ability to conclude invoices that span multiple businesses. This option allows for a client to have open charges in multiple businesses and receive a single invoice in which all charges and payments are displayed. In this situation, ImproMed works behind the scenes to process all of the invoice items appropriately for each business.

While the primary function of the Estimates Module is generating personalized estimates for clients and patients, there are several other important aspects of the module: Consent Forms, Canned Estimates, Multi-Module Estimate Creation, Multi-Estimate Creation, and transferring the estimate to an invoice.

Treatment Plans are a centralized, business-wide view of all procedures that need to be performed for patients currently in the hospital. The Treatment Plan allows operators to enter tasks that need to be performed while a patient is in the practice. Product tasks, when completed, are moved to the invoice; activity and monitoring tasks when completed are stored as part of the patient's medical record. Treatment Plans create a virtual whiteboard that is accessible by every computer in real-time. Using the search filters allows operators to view the business they are operating in or all businesses.

The ability to track and verify treatment compliance within a veterinary business is growing increasingly critical. For example, if you recommend that a specific treatment be provided to a patient and the client declines, it is important you are able to verify that fact in the future.

To help you monitor this important aspect of your business, ImproMed contains three types of compliance lists: Recommended, Deferred, and Declined.

Recommended products are inventory items and services that the doctor has advised be administered to the patient. Deferred products are inventory items and services that the client wishes to be provided at a later time. Declined products are inventory items and services that the client never wants to be provided.

Products on the Recommended list can also be moved to the Deferred list or Declined list. Moving the products to the Deferred or Declined lists leaves a record of the product as being recommended and

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shows the product as deferred or declined. This provides the necessary ability to track compliance as recommended by AAHA.

The Travel Sheets module converts traditional paper-based travel sheets into an electronic, paperless travel sheet system. Any product marked as being administered on an electronic travel sheet can automatically be moved to a patient's invoice, treatment plan, compliance list or estimate. If a business uses travel sheets to add products to any destination for another business, operators cannot remove or modify that product unless an operator logs into that business.

Invoices, Estimates, Treatment Plans, Compliance Lists, and Travel Sheets are all part of ImproMed's invoicing system and can be used together or separately, as needed, to help the veterinary business charge for products. When used in a multi-business environment, there are many exciting possibilities that can be realized by taking advantage of ImproMed's multi-business capabilities. For those businesses that are separate locations the primary benefit comes from being able to know and handle open charges from the other locations. A business that houses two distinctly different businesses in the same building, like a general business and a boarding facility, will benefit from the consolidated invoice at the end but may also gain additional functionality through the estimate, compliance, and treatment plan options. For example, because the items displayed in the treatment plans can be viewed per business, it may be beneficial for the boarding facility to add exams, vaccines, or other medical services to the general business' treatment plan. Not only does this help ensure that charges are going into the appropriate business, it also helps ensure that patient care is being handled correctly.

If we turn our attention to the multi-specialty referral center, we can quickly see where the benefits of multi-business estimates, treatment plans, and invoices are. An estimate can be created which contains services that need to be performed by different specialties. These items are added to the estimate for the respective specialty. Once the estimate has been agreed to, the estimate can be transferred to invoicing or to the treatment plan. The products on that estimate will maintain their respective business settings. As an example, a patient visiting an oncologist may need radiographs, a hospital stay, medication, and an examination. An estimate could be created that would place the radiograph charges into a radiology business, the hospital charges into the main business, and the medications and exam fees into the oncology business. The client would receive a single estimate for the patient with what needs to be done. Once processed with the client, the estimate can be transferred and each item will be transferred to its appropriate destination within the business for which it was created.

Conclusion

As we can see, the ImproMed Practice Management Software supports innumerable configurations of multiple businesses in a single database. This support facilitates the setup, configuration and use of the ImproMed program in any environment and can be tailored to meet the specific needs for any business arrangement. ImproMed's multi-business solutions allow the operator to pick and choose the pieces that are needed and not use the parts that do not apply while providing the proper controls to the financial, employee, and production areas of the programs. This combination of information governance and flexible program usage makes the ImproMed software multi-business solution a perfect fit.