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Production Tracking

Overview

Tracking doctor production is an essential part of any veterinary business. Doctors may have a multitude of relationships with a particular practice, from employee to independent contractor. Furthermore, production can be based on fees charges or income received. Animal Intelligence (AI) is designed to handle all of these relationships in order to provide you with just the information you need.

The AI Report Generator provides the capability of creating custom reports that display the information desired in the format requested.

Information Storage in AI

The heart of the production tracking system is the “line item”. Each item on a posted invoice contains critical information that is used to create and run reports. The following table lists those data (fields) that are most commonly used in production tracking.

Line Item Field	Description
Item Date	Date the item was placed on the invoice
Invoice Date	Date the invoice was posted
Register Date	Date of the register that contains the posted invoice
Date Paid	Date the item was “paid off” entirely
Register	Register number that contains the posted invoice
Item Doctor	Doctor responsible for the line item
Quantity	Item quantity
Item Value	The adjusted price of the item (not including sales tax)
Amount Owed	The amount of money still owed on this item.

Filters

The Report Generator allows information to be filtered. The use of filters can be demonstrated by example. The “Closed Order” table contains the line items of all invoices ever posted in AI since the first day it was used. Think of this as a file cabinet containing records for every patient you have ever seen in your practice. Let’s assume that you want to gather some information on just those patients you saw in July of last year. The first step in gathering this information is to separate the records of just those patients seen during that month.

This exercise of separating data is called *filtering*. The records are put through a process that strains out everything except the information you need. In this instance, your filter is a time period (the beginning of July to the end of July). The same method is used for applying filters to data tables in the Report Generator.

If you wanted to calculate the total fees charged by a certain doctor during July of 1999, the following filters could be applied to the Closed Order table (see Report Generator documentation for more information on creating reports and applying filters):

```
(COF_IVDATE>=CTOD('07-01-1999'))  
AND (COF_IVDATE<=CTOD('07-31-1999'))  
AND (COF_ITDOC=3)
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This filter applies the following range to the closed order table: the invoice date must be greater than or equal to July 1, 1999 AND the invoice date must be less than or equal to July 31, 1999 AND the doctor associated with the invoice item must be doctor number three. Once this filter is applied, the only information that appears in this report are items that fall within the given date range AND are assigned to doctor number three.

Dates

There are four dates associated with each line item on an invoice. Each has a specific purpose, but one is not more important than the other. They are provided so that you will have maximum flexibility in creating your reports.

An invoice (and thus a line item on an invoice) goes through several levels of processing. Depending on your practice situation, the processing may occur all on the same date, or it may occur over a range of dates. Out-patient practices generally do all processing on the same day. The invoice is created (line items are placed on the invoice), posted (the invoice is permanently stored) and the end of day is closed (the invoice is associated with a particular register posting date). In this instance, the item date, invoice date and register date will all be the same.

Hospitals that admit patients for lengthy stays or those that don't balance the cash drawer every day will notice that these three dates may differ for invoices that were started on the same day. Assume that a patient is admitted on a Monday and released on a Thursday evening, after the day has been closed. New fees (line items) are added each day. This means that the item dates for items on the same invoice will differ from each other and correspond to the date each was added to the invoice (Monday through Thursday). The invoice was closed Thursday night which means that the invoice date is Thursday. However, the invoice won't be included on an end of day report until Friday. Therefore, the register date will be Friday.

Why does this matter? The date you choose impacts production totals. Hospitals that routinely have invoices spread over several days run the risk of miscalculations especially when invoices are left open from one month to the next. Therefore, we strongly recommend that all production reports are filtered by register date only unless there is a specific need to do otherwise.

Tracking by Fees Charged

The most common production tracking scenario is the employee veterinarian who is evaluated by fees charged over a given period of time (usually monthly). A standard report, called "Production", comes standard with the AI sample reports. This is a typical filter that might be applied:

**(COF_REGDAT>=CTOD('|LASTMONTHSTART|'))
AND (COF_REGDAT<=CTOD('|LASTMONTHEND|'))**

Since most production reports will be run for the previous month, this filter selects all line items from the Closed Order table that have a register date greater than or equal to the beginning of last month and less than or equal to the end of last month. Of course, you could add in extra filters to select for a specific register or doctor.

Tracking by Income Received

This method of production tracking is generally used in hospitals where the doctors are independent contractors and the management pays on fees collected versus fees charged. This method is inherently more complicated and requires some explanation.

Tracking by fees charged is simple because the data are permanent and unchangeable. Once an invoice is posted, the production amounts are fixed. Regardless of when the report is generated, the totals will be the same.

This is not true for tracking by income received. Payments are not always applied at the time the invoice is posted, and some payments for a particular invoice may trickle in over a period of several months. This means that an account may require tracking for months.

There are two methods of calculating income. One can either track the actual payments or the amount still owed on line items. AI uses the latter tracking method because it is based on sound accounting principles and it doesn't involve subjective decisions by staff members regarding the division of payments between multiple doctors and services.

AI uses the following principles to track amounts owed:

- New items placed on an invoice are assigned an amount owed equal to the fee charged.
- When an invoice is posted, any new payments or outstanding credits are applied to the outstanding items on the oldest invoice first. These items are "paid off" (the amount owed is decreased or set to zero) until there is no credit left.
- The "date paid" for an item is set to the current date when it is "paid off".
- Each payment subsequently received is applied in the same fashion.

The Client Activity Review window (exposed by clicking the Review button in the client tabsheet) displays any outstanding amounts owed, item by item, in red. This information is also available through the Report Generator, allowing you to create reports based upon income received.

There are several methods of tracking income. The simplest method, which requires only one report to be run for each doctor, is revealed in the following filter:

**(COF_RESDAT>=CTOD('|LASTMONTHSTART|'))
AND (COF_RESDAT<=CTOD('|LASTMONTHEND|'))**

The only change is the date field used. Note that we used the "Date Paid" filter which corresponds to the field COF_RESDAT (date resolved) instead of COF_REGDAT (register date). You do not need to

memorize these field names. All you need to do is to select the “Date Paid” filter variable and specify the starting and ending date.

This filter can be used to display a production report that displays totals for only those items that were “paid in full” during the time period. Further filters, such as doctor or register, may be included as well.

The one issue with this method is that the date paid will not be assigned until the item is paid in full. This may be significant for high priced items such as surgical procedures. If a surgery costs \$500 and the client only pays \$300 the first month, this item has not been paid in full and therefore will not be included on that month’s report. If the client pays the rest during the following month, the entire \$500 will show up on the subsequent production report.