

- From the **Section** menu, select **General Management**. The Management Functions dialog opens.
- Click the Financials tab.
- Select **Release Current Open Batch for Settlement** and click **OK**.
- If batch closes successfully, DVMAX will display a notice on the screen indicating a successful close and a Batch Close report will print from the receipt printer.

Accessing the Intuit Merchant Service Centre from DVMAX

Intuit Quickbooks users can securely access the Quickbooks/Intuit Merchant Service Centre from DVMAX at any time.

To access the MSC:

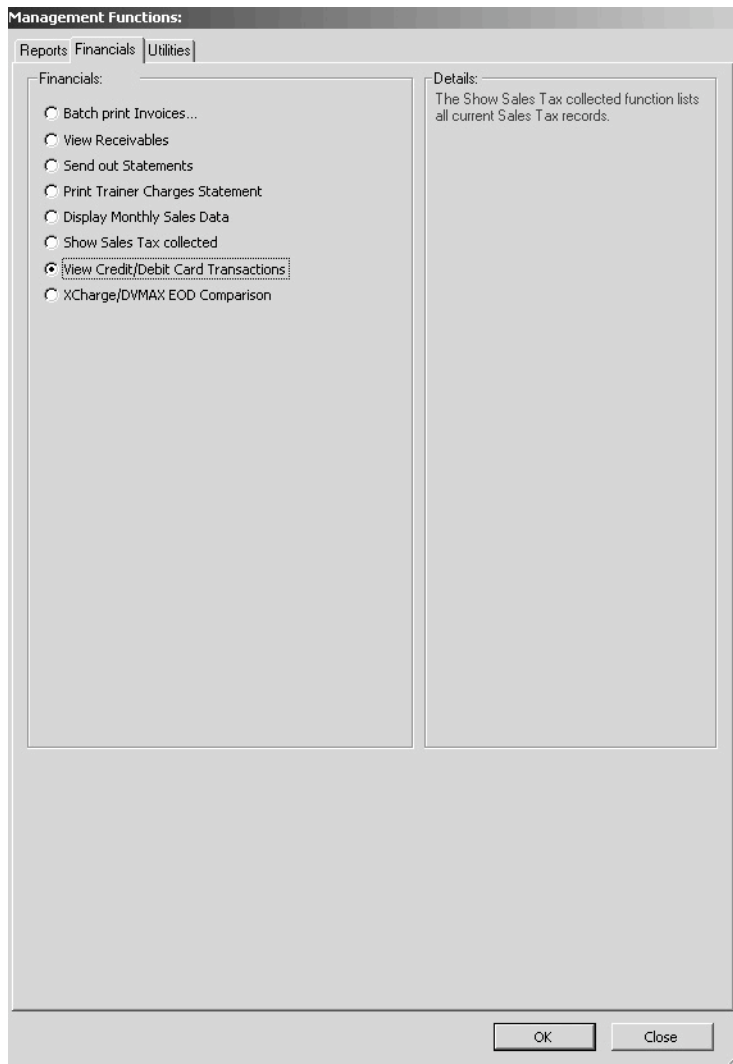
- From the **Section** menu, select **General Management**. The Management Functions dialog opens.
- Click the Financials tab.
- Select **Intuit Quickbooks Merchant Service Centre** and click **OK**.
- The MSC secure webpage will open in your browser.

Credit and Debit Card Transaction Logs

DVMAX logs all incoming and outgoing credit and debit card transaction requests. DVMAX audit logs are automatically enabled, and cannot be disabled. These logs can be exported and then purged. For Batch Close users, the amount of the closed batch will be reflected in the log as well.


To view the Credit and Debit Card transaction log:


- From the **Section** menu, select **General Management** and go to the Financials tab.
- Select **View Credit/Debit Card Transactions** and click **OK**.



Custom Reports

Custom Reports are available from the General Management Reports tab, and from the Reports button on the Command Palette. These reports are web-based; that is, they require an internet connection to generate the report. DVMAX's reporting engine allows custom reports to be sent to the clinics independent of release cycle. The reporting engine respects existing DVMAX security and logins. Each report's security is mapped to an existing Practice security group. CSS style sheets are used for display and printing.

 From time to time new reports are added. **The list provided in this Reports chapter may not cover all existing custom reports.** There is a description of each report included in the list of custom reports. You can review the selection of reports by choosing *General Management* from the *Section* menu of the DVMAX main screen.

 The webserver must be running, and you must have a valid IP address.

To verify that the webserver is running:

- Log in to DVMAX as Administrator.
- From the *Section* menu, select *System Constants*. Go to the *User Settings* tab.
- Verify that the Web Server is ON and that there is a valid Port number.
- Close *System Constants*.

About Custom Reports

Custom reports not only offer a powerful addition to DVMAX's report generating function but the reports offer the data in a more presentation-ready layout. Reports are written in Active 4D, and are stored in the "customReports" folder in the web folder. Each report is contained in its own folder inside the "customReports" folder. Any patient names in the reports (where applicable) will link to DVMAX Anywhere. This feature will let you click the link and the patient record will open in DVMAX Anywhere. In each report's folder are two files:

- **index.shtml** - this is the report code.
- **Definition.xml** - the report definition. This contains the report's name, security access, and description.

The name of the report and its description appear on the Reports list.

Appointment List By Staff

The Appointment by Staff list shows patient, client and appointment information for selected staff by date range. Report columns are configurable and can be exported to Excel. Click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the **DVMAX Anywhere** chapter in the user guide.

Appointment Range Report

This report shows Client, Patient and Appointment data and can be used to share information with third-party vendors. Click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the DVMAX Anywhere chapter in the user guide.

Appointment Type Count and Sales

This report totals appointments by appointment type and roughly estimated sales.

Boarding Report

The Boarding Report shows all canine patients who visited within the requested date range. Click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the DVMAX Anywhere chapter in the user guide.

Call Up List

This report functions the same as the Call Up List report built into DVMAX, but has the extended ability to list more than 5 reminders per patient if in existence. It excludes inactive/deceased patients.

Client Retention Analysis

This report gathers client activity based on two user-specified time periods to make comparisons.

Complete Audit Trail – All Transactions

Complete Audit Trail lists all transactions, broken down by client, for a given time period. All unfinished invoices are included, regardless of specified date. Click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the DVMAX Anywhere chapter in the user guide.

Consult Retention

This report allows referral practices to determine if patients who visited for an initial consult return to the referral clinic for another visit. In most cases, the patient typically comes in to be seen once for specific reason and then returns to their primary hospital.

Current Visit Report

The Visit Report presents a list of active visits for reference by care staff away from the Front Desk/Waiting Area. The report shows the most recently checked-in visit at the top of the list and is refreshed every 30 seconds. This report is ideal to display on a monitor rather than a paper print out. Click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the **DVMAX Anywhere** chapter in the user guide.

Deleted Appointments

Shows a list of deleted appointments for a given date range. Click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the DVMAX Anywhere chapter in the user guide.

Detailed Doctor Production

The Detailed Doctor Production report allows you to configure and perform bonus calculations by provider. The report gathers information from the Detailed Sales Report, Receivables Report and the Average Invoices per Doctor report.

Detailed Sales Report

The Detailed Sales Report is the standard DVMAX sales report, which allows you to report on any combination of doctors, time periods and bill items.

Discount Report

This report gathers all undefined discounts (global/default discounts, etc) and reports on them. Separately, it reports on bill item discounts as well and then returns a grand total value.

GL Account

This report makes full use of the GL Account codes in DVMAX. If assigned to Bill items, DVMAX will search for and group sales totals based on GL Account codes. The report can be copy/pasted into excel, and then imported into accounting software like Quickbooks.

Initial Referral Report

The Initial Referral Report provides a comparison of referral numbers between two time periods, broken down by referring DVM, Practice and referral recipient. It allows users to measure impact of marketing efforts.

Invoice to Line Item Comparison Report

Find how an adjustable bill item is used on invoices. The output shows the invoice number, the invoice total, whether the queried bill item was used and how much money was associated with it.

MRE Search Report

The MRE Search report gathers medical record entries with a specified code and within a date range and reports on client/patient, medical record code/description and totals them per active doctor or provider.

Multi Site Detailed Doctor Production

The multi site detailed doctor production report lets you configure and perform bonus calculations per provider.

Patient Visits

This report looks over invoices in a date range, and reports on how many Patients were invoiced. As a result, it gives an idea of how many unique patient visits have occurred for a specific provider compared to revenue.

Price Increase/Revenue Projection

This report shows the top-selling items in your practice over the last 12 months, and what the net increase in revenue would be were you to increase the prices of these items 5%, 10% or 15%.

Rabies Vaccine Report

The Rabies Vaccine report displays or exports information on patients who have received a rabies vaccination within a specified time period. Click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the DVMAX Anywhere chapter in the user guide.

Recall Reason

This report searches a date range for recalls and their reason, summarized in a compact view.

Referral Line Item Report

The Referral Line Item report gathers invoice line items in a specified date range and category and reports on patient, provider and referral revenue associated with them. This report is meant to be exported. Click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the DVMAX Anywhere chapter in the user guide.

Reminder Compliance Helper

The Reminder Compliance Helper gathers all reminders due in a date range, grouped by reminder type. It will help you track compliance for specific reminder types.

Species Revenue Report

The species revenue report groups sales totals by species.

Transaction Report

The transaction report shows all transactions for a given time period. You can report on one or multiple transaction types.

Visit Overview Report

A report on a per doctor basis that estimates average visit duration, wait time and revenue per visit. This report works when using the Visit Check-In and Status features associated with the Appointment Scheduler. Click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the DVMAX Anywhere chapter in the user guide.

Generating a Custom Report

- Click the *Reports* button on the *Command Palette*, or choose *General Management* from the *Section* drop-down menu and click the *Reports* tab. The *Report List* appears.
- The Standard and Custom report lists display. Double-click the report in the Custom list you want to generate.
- Type the requested information such as Start Date and End Date in the appropriate fields.
- Click *Generate Report*.
- The report opens in a new browser window
- Where applicable, click a patient name link on in the report to open the record in DVMAX Anywhere. For more on using DVMAX Anywhere, refer to the DVMAX Anywhere chapter in the user guide.

Appointments from 5/18/2016 to 5/21/2016: Carrollton Animal Hospital Print

Dr. Shanna:

Appt Column	Appt Time	Appt Comments	Client Name	Home Phone	Work Phone	Patient Name	Patient File	Species
Dr. Shanna	8:30 AM		Ruth Schwandt	355-2222	882-2912	Cassy		Canine
Dr. Shanna	8:45 AM		Donald Swisher	333-3333		Dillon		Canine

Dr. Sean:

Appt Column	Appt Time	Appt Comments	Client Name	Home Phone	Work Phone	Patient Name	Patient File	Species
Dr. Sean	8:30 AM		Roslyn Sailer	353-0982	433-1341	Angel		Canine
Dr. Sean	8:15 AM		Rachael Bonita	298-2211		Abby		Canine
Dr. Sean	8:45 AM		Rachael Ace	937-0778		Bella		Feline

Dr. Johnathan:


Appt Column	Appt Time	Appt Comments	Client Name	Home Phone	Work Phone	Patient Name	Patient File	Species
Dr. Johnathan	8:30 AM		Appt Inhouse	937-2912	937-1112	Ann		Canine
Dr. Johnathan	8:45 AM		Tamika Isaacson	322-2231		Bambi		Canine

Dr. Mike:

Appt Column	Appt Time	Appt Comments	Client Name	Home Phone	Work Phone	Patient Name	Patient File	Species
Dr. Mike	8:15 AM		Joseph Miller	265-7783		Boo		Canine

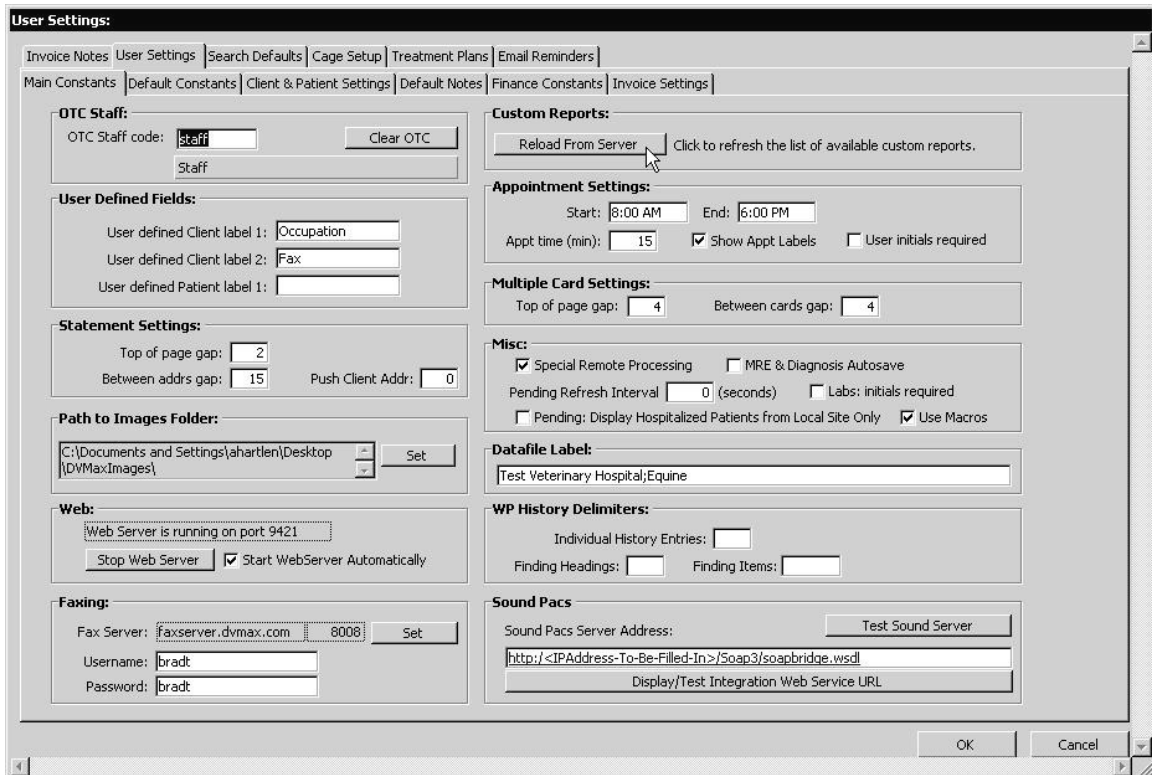
Adding a New Custom Report to the Custom Report List

When a new report is received (typically by e-mail from your DVMAX Technical Support team), you must place it in its proper folder.

 Only alphanumeric codes and the underscore character can appear in the XML element definitions.

To add a new custom report:

- From the *Section* menu, select *System Constants*. Click the *User Settings* tab. In the Custom Report section, click *Reload From Server*.



User Settings:

Invoice Notes | **User Settings** | Search Defaults | Cage Setup | Treatment Plans | Email Reminders

Main Constants | Default Constants | Client & Patient Settings | Default Notes | Finance Constants | Invoice Settings

OTC Staff:
 OTC Staff code:

User Defined Fields:
 User defined Client label 1:
 User defined Client label 2:
 User defined Patient label 1:

Statement Settings:
 Top of page gap:
 Between adhrs gap: Push Client Addr:

Path to Images Folder:

Web:

 Start WebServer Automatically

Faxing:
 Fax Server:
 Username:
 Password:

Custom Reports:
 Click to refresh the list of available custom reports.

Appointment Settings:
 Start: End:
 Appt time (min): Show Appt Labels User initials required

Multiple Card Settings:
 Top of page gap: Between cards gap:

Misc:
 Special Remote Processing MRE & Diagnosis Autosave
 Pending Refresh Interval (seconds) Labs: initials required
 Pending: Display Hospitalized Patients from Local Site Only Use Macros

Datafile Label:

WP History Delimiters:
 Individual History Entries:
 Finding Headings: Finding Items:

Sound Pacs
 Sound Pacs Server Address:

 Display/Test Integration Web Service URL