

Complete set of End Of Year documents for DVMax 7.0

ID: 247

Topic:

Current State: Approved

Author: Sean

Current Owner: Sean

Last Modified: 11/18/2004 2:42 PM

ENVIRONMENT

REFERENCE

This document is a compilation of all End Of Year documents typically required for DVMax 7.0 users. Each document has it's own ID and can be accessed using this ID individually.

Note: This document is several pages in length, please insure that all pages are examined.

ATTACHMENTS

Inventory Value Report in ALL versions of DVMax

ID: 229

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner: Sean

Last Modified: 11/17/2004 3:54 PM

ENVIRONMENT

This section is designed to assist in the printing of an 'Inventory Net Value' report. This report MUST be performed at the end of the year. It should be noted that the information we will be requesting is for an entire year.

REFERENCE

Note: This report should only be printed if the Inventory section is used in your practice.

Obtaining the report

1. Select 'Inventory Management' from the 'Section' menu.
2. Click the 'All Records' button.
3. Click the 'File' menu & select 'Print'
4. From the list choose 'Net Value' & print.

ATTACHMENTS

Accounts Receivable report in DVMax 7.0

ID: 245

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner:

Last Modified: 11/18/2004 7:42 AM

ENVIRONMENT

This document is designed to assist in the printing of an Accounts Receivable report.

NOTE: This report MUST be performed at the end of the year. It should be noted that the information we will be requesting is for an entire year.

REFERENCE

Obtaining the report

1. Select 'General Management' from the 'Section' menu.
2. Locate 'Receivables Report' in the list and click 'OK'.
3. Select the 'Totals only' option and click 'OK'. If you pay providers based on production, then repeat step 3 above and select and print the 'Provider Breakdown' report as well.

ATTACHMENTS

Year End Income Summary / Detailed Sales Report in DVMax 7.0

ID: 244

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner:

Last Modified: 11/18/2004 7:42 AM

ENVIRONMENT

This document is designed to assist in the printing of a 'Category' type 'Detailed Sales Report' for calculating a summary year end income. It should be noted that the information we will be requesting is for an entire year. This report needs to sift through information for the entire year and can take a long time to process. We recommend that this be left to run unattended while the practice is closed.

REFERENCE

Obtaining the report

1. Select 'General Management' from the 'Section' menu
2. Scroll down and select 'Detailed Sales Report' & choose 'OK'
3. Enter '01/01/2004' for the starting date & '12/31/2004' for the ending date.
4. Select the 'Category' option & choose 'OK'

ATTACHMENTS

Average Invoice per Doctor Report in DVMax 7.0

ID: 242

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner: Sean

Last Modified: 11/18/2004 7:42 AM

ENVIRONMENT

This document is designed to assist in the printing of an Average Invoice per Doctor Report. It should be noted that the information we will be requesting is for an entire year. This report needs to sift through information for the entire year and can take a long time to process. We recommend that this be left to run unattended while the practice is closed.

Note: This report can be run after the year-ends.

REFERENCE

Obtaining the report

1. Select 'General Management' from the 'Section' menu.
2. Scroll down until 'Average Invoice per Doctor Report' is visible & choose 'OK'.
3. Enter '01/01/2004' for the starting date & '12/31/2004' for the ending date.
4. Click 'OK'.

ATTACHMENTS

Sales Tax Charged Report in DVMax 7.0

ID: 246

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner:

Last Modified: 11/18/2004 7:43 AM

ENVIRONMENT

This document is designed to assist in the printing of a Sales Tax Charged Out Report. It should be noted that the information we will be requesting is for an entire year. This report needs to sift through information for the entire year and can take a long time to process. We recommend that this be left to run unattended while the practice is closed.

REFERENCE

Note: This report can be run after the year-ends.

Obtaining the report

1. Select 'General Management' from the 'Section' menu.
2. Scroll down until 'Sales Tax Charged Out' is visible, select it and choose 'OK'.
3. Enter '01/01/2004' for the starting date & '12/31/2004' for the ending date. Leave the starting time at '00:00:00' and the ending time at '23:59:59'.
4. Click 'OK'.

ATTACHMENTS

Updating Spent Year to Date (YTD) Field in DVMax 7.0

ID: 243

Topic: End Of Year

Current State: Approved

Author: Sean

Current Owner: Sean

Last Modified: 11/18/2004 7:42 AM

ENVIRONMENT

IMPORTANT: This procedure should be run after all other end of year procedures.

This document is designed to assist in updating the 'spent year to date' field on all client records back to zero.

REFERENCE

Note: This action should be performed on or near the first day of the year.

Obtaining the report

1. Select 'General Management' from the 'Section' menu.
2. Click on the 'Utilities' folder tab.
3. Choose 'Special Routines' & choose 'OK'.
4. Select the 'Annual update of the spent YTD field' & choose 'OK'.
5. Follow the screen prompts.

ATTACHMENTS