

Managing Copays for Petly* Plans with Cornerstone* 8.6 NEXT

With the current integration of Cornerstone* 8.6 NEXT Software and Petly* Plans, all wellness plan (WP) codes are automatically discounted 100% upon invoicing.

However, some practices want to charge a copay for examination services in excess of the number allowed by Petly Plans. For example, one physical examination is included at the 100% discount, while all subsequent examinations are charged a \$10 copay.

In this case, IDEXX recommends creating a group within Cornerstone that contains both the WP copay code (a different code than the original plan item) and a nonplan invoice item. The WP copay code allows Petly Plans to record usage, and the nonplan invoice item ensures the pet owner is charged the copay fee and that the fee is collected at the time of service.

Here's how to set up these two service codes:

1. Since the copay code won't have the 100% Petly Plans discount applied, set up or change the WP copay code to \$0.00 in Cornerstone.
2. In the **Client description** box, enter a note such as "Petly Plans member visit," so that the same item description doesn't show twice when invoicing, since a second copay item for the actual billing will also appear.

Invoice Item Information for WP Examination Copay

ID: WP1010 WP Examination Copay

Info Instructions Reminders Tax/Disc Link Items Spec. Actions Travel Whiteboard

Item information

Hospital description: WP Examination Copay

Client description: Preventive Care Member Visit

Classification

Primary: WP Petly Plan Item

Subclass: Base Plan Item

Default revenue center

Sell barcode

Pricing

Minimum price: .00

Dispersing fee: .00

Estimate markup: .00 %

Automatic

Auto calculate price

Percentage

Dollar amount

Round to:

Quantity	Amount	Markup
Base	.00	.00
	.00	.00
	.00	.00
	.00	.00

Allow change: Always

3. Create a new nonplan invoice item that will charge the correct amount for the copay.

Invoice Item Information for WP Examination Copay

ID: 2276 WP Examination Copay

Info Instructions Reminders Tax/Disc Link Items Spec. Actions Travel Whiteboard

Item information

Hospital description: WP Examination Copay

Client description:

Classification

Primary: WP Petly Plan Item

Subclass: Base Plan Item

Default revenue center

Sell barcode

Pricing

Minimum price: 10.00

Dispersing fee: .00

Estimate markup: .00 %

Automatic

Auto calculate price

Percentage

Dollar amount

Round to:

Quantity	Amount	Markup
Base	10.00	.00
	.00	.00
	.00	.00
	.00	.00

Allow change: Always

4. Create a new group code with an invoice ID that is easy for staff to remember, such as COPAY.

5. On the Group Items tab, enter both the WP code and the new nonplan invoice item.

Tip: (Optional) Set the group print option accordingly if you want only the group line or only the detail lines to be printed.

The pet owner's invoice will look like this:

Mr. Robert Albee 8820 Delmer Lane Eau Claire, WI 54703		Client ID: 54 Invoice #: 16784 Date: 2/28/2017 Open Invoice	
Patient ID: 128	Species: Feline	Weight: 16.50	Pounds
Patient Name: Chablis	Breed: Devon Rex	Birthday: 01/22/2016	Sex: Female
Description	Staff Name	Quantity	Total
2/28/2017 Preventive Care Member	Dr. Casey Stone, DVM	1.00	\$0.00
Preventive Care Member Visit		1.00	\$0.00
WP Examination Copay		1.00	\$10.00
Patient Subtotal:			\$10.00
Invoice Total:			\$10.00
State Sales Tax:			\$0.00
Total:			\$10.00
Balance Due:			\$10.00
Previous Balance:			\$0.00
Balance Due:			\$10.00

Note: The plan copay item will **not** display the paw print icon to the left of the item description because the Petly Plans 100% discount is not applied (since the plan item is already \$0).