

Invoicing Petly Plans in Cornerstone 8.6 NEXT

This work instruction will cover the following steps to invoicing Petly Plans in Cornerstone 8.6 NEXT:

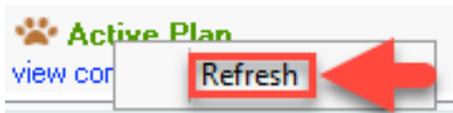
- Viewing and refreshing plan status icon in Cornerstone
- Invoicing Petly Plans
- Applying a non-plan item discount to an invoice item not covered by the plan

When invoicing a Petly Plans member in Cornerstone 8.6, verify the pet owner has an Active Plan in progress by reviewing the plan status paw print.

The screenshot displays the 'Doggett, Rich - Patient Clipboard' window. The top section shows client details for Rich Doggett, including ID 17850, balance due of \$29.61, and contact information. The 'Patient list' table shows Kevin, a 4-year-old neutered male Shorthair Domestic cat, with a weight of 10.7 pounds and an 'Active Plan' status. The 'Patient information' section provides details about Kevin's membership, including his date of birth (5/7/2013) and class (ADULT PET MEMBE). The bottom section is a 'Summary' table with columns for Date, Staff, and History, listing various medical visits and procedures from 2014 to 2018. A red box highlights the 'Active Plan' status in the patient information section.

| Date | Staff | History |
|------------|-------|--|
| 1/10/2018 | CS | 1.00 WP ANNUAL EXAM ADULT (WP1002) for \$53.05 by CS |
| 1/10/2018 | CS | 1.00 WP FVCP ANNUAL (WP2020) for \$28.00 by CS |
| 1/10/2018 | CS | 1.00 FECAL (FE) for \$32.90 by CS |
| 11/14/2017 | CS | 1.00 WP FVCP ANNUAL (WP2020) for \$28.00 by CS |
| 4/7/2015 | CVC | 1.00 MEMBERSHIP MONTHLY FEE (MEMAM) for \$17.00 by CML |
| 8/22/2014 | 7 | clienteward - FINAL 08/22/2014 |
| 8/22/2014 | 4 | Annual Wellness Feline Tentative (AWF) |
| 8/22/2014 | AJ | 10.70 pounds Vital Signs updated |
| 8/22/2014 | 4 | DVVC - Preventive Care Visit: Adult Feline Visit - CLOSED 08/23/2014 |
| 8/22/2014 | 7 | Quest - Adult Feline - CLOSED 08/23/2014 - adult quest |
| 8/22/2014 | 7 | welness and vaccs: JCP Practice: BUR |
| 8/22/2014 | 4 | Preventative Care - Adult Feline (PCAF) by CML |
| 8/22/2014 | 4 | 1.00 ANNUAL WELLNESS VISIT (AN) for \$53.05 by CML |
| 8/22/2014 | 4 | 1.00 FELINE RABIES (FR1) for \$29.05 by CML |
| 8/22/2014 | 4 | 1.00 FVRCP-3YR (FD3) for \$27.15 by CML |
| 8/22/2014 | 4 | 1.00 dose of REVOLUTION CAT 5-15H (REVC1-5) for \$21.36 by CML |
| 8/22/2014 | 4 | 1.00 TDE NAIL TRIM (TNT) for \$15.30 by CML |
| 8/22/2014 | 4 | 1.00 CASE TECHNICIAN: ASHLEY (TAJ) for \$0.00 by CML |
| 5/8/2014 | 4 | clienteward - FINAL 05/08/2014 |
| 5/8/2014 | 4 | RECHECK EXAMINATION Final (RECH) |
| 5/8/2014 | 4 | DVVC - Recheck Exam - CLOSED 05/09/2014 |
| 5/8/2014 | DJ | 9.65 pounds |
| 5/8/2014 | 4 | RE-CHECK EAR- NOT IMPROVING/ CL Practice: BUR |
| 5/8/2014 | 4 | 1.00 MEDICAL PROGRESS EXAM (OVR) for \$46.30 by MMD |
| 5/8/2014 | 4 | 1.00 bottle of FELINE WELACTIN SOFTGELS (WELACT1) for \$19.90 by MMD |

If the enrollment occurred recently on the Petly Plans website and the plan status is not reflecting accurately, right click the paw print icon, and click Refresh to refresh the plan status.



Click the Active Plan text to View Plan Details including plan start date, end date, non-plan item discount, a list of items included in the plan, price of the items, and remaining quantities within the plan. Note the Non Plan Discount for any items on the invoice not covered by the plan.

View Plan Details

Petly Plan for Kevin (56545)
Client: Rich Doggett

Adult Feline Plan - In Progress

Start Date **End Date** **Non-Plan Discount**
07/20/2017 07/19/2018 10%

Plan Items

| Item ID | Item Description | Price | Remaining Item |
|---------|----------------------|---------|----------------|
| WP1002 | WP ANNUAL EXAM ADULT | \$53.05 | Unlimited |
| WP1010 | WP EXAM COPAY | \$20.00 | Unlimited |
| WP2020 | WP FVCP ANNUAL | \$28.00 | 1 of 1 |
| WP2040 | WP FELV ANNUAL | \$32.85 | 1 of 1 |
| WP3000 | WP FECAL EXAM | \$31.60 | 1 of 1 |

Right click and select "Invoice" to open the invoice screen from the Patient Clipboard to begin an invoice.

Doggett, Rich - Patient Clipboard

Client ID: 17850 Rich Doggett Pet Owner
Balance Due: \$29.61
Search: (360) 420-7663 (Cellular)

Kevin (56545)
4 Yrs: 8 Mos (5/7/2013)
FEL Shorthair, Domestic
Color: Black
Status: Active
Ward:
RDVM:
add RDVM

10.7 pounds
Neutered Male
Markings: Petly member 7/20/15
Class: ADULT PET MEMBE
Cage:
Active Plan

Summary | Text | Problems | Dx | Rx | Medical Notes | Lab | Vaccines | Vital Signs | VetConnect PLUS

| Date | Staff | History |
|------------|-------|---|
| 1/10/2018 | CS | 1.00 WP ANNUAL EXAM ADULT (wP1002) for \$53.05 by CS |
| 1/10/2018 | CS | 1.00 WP FVCP ANNUAL (WP2020) for \$28.00 by CS |
| 1/10/2018 | CS | 1.00 FECAL (FE) for \$32.90 by CS |
| 11/14/2017 | CS | 1.00 WP FVCP ANNUAL (WP2020) for \$28.00 by CS |
| 4/7/2015 | CVC | 1.00 MEMBERSHIP MONTHLY FEE (MEMAM) for \$17.00 by CML |
| 8/22/2014 | 7 | clientward - FINAL 08/22/2014 |
| 8/22/2014 | 4 | Annual Wellness Feline Tentative (AWF) |
| 8/22/2014 | AJ | 10.70 pounds Vital Signs updated |
| 8/22/2014 | 4 | CVVC - Preventive Care Visit - Adult Feline Visit - CLOSED 08/23/2014 |
| 8/22/2014 | 7 | Quest - Adult Feline - CLOSED 08/23/2014 - adult quest |
| 8/22/2014 | 7 | welness and vaccs. JCP Practice: BUR |
| 8/22/2014 | 4 | Preventative Care - Adult Feline (PCAF) by CML |
| 8/22/2014 | 4 | 1.00 ANNUAL WELLNESS VISIT (AN) for \$53.05 by CML |
| 8/22/2014 | 4 | 1.00 FELINE RABIES (FR1) for \$23.05 by CML |
| 8/22/2014 | 4 | 1.00 FVRCP-3YR (FD3) for \$27.15 by CML |
| 8/22/2014 | 4 | 1.00 dose of REVOLUTION CAT 5-15H (REVC1-5) for \$21.36 by CML |
| 8/22/2014 | 4 | 1.00 TOE NAIL TRIM (TNT) for \$15.30 by CML |
| 8/22/2014 | 4 | 1.00 CASE TECHNICIAN: ASHLEY (TAJ) for \$0.00 by CML |
| 5/8/2014 | 4 | clientward - FINAL 05/08/2014 |
| 5/8/2014 | 4 | RECHECK EXAMINATION Final (RECH) |
| 5/8/2014 | 4 | CVVC - Recheck Exam - CLOSED 05/09/2014 |
| 5/8/2014 | DJ | 9.65 pounds |
| 5/8/2014 | 4 | RE-CHECK EAR: NOT IMPROVING/CL Practice: BUR |
| 5/8/2014 | 4 | 1.00 MEDICAL PROGRESS EXAM (DVR) for \$46.30 by MMD |
| 5/8/2014 | 4 | 1.00 bottle of FELINE WELACTIN SOFTGELS (WELACTI) for \$19.90 by MMD |

Rows 1 to 25 of 120

End Find Next Go to Date Print History Preview

Appointment Scheduler...
Check-In...
Correspondence...
Diagnosis...
Drug Interaction Matrix...
Electronic Whiteboard
Estimate...
Imaging
Invoice...
Lab Request...
Medical Note...
Medical Note Quick Text...
New Case...
Patient Advisor Exam...
Patient Visit List...
Prescribe...
Problems...
Reminders...
Reservation...
Vital Signs/Weight...
Next Check-In F8
Previous Check-In F7

Enter applicable Wellness Plan (WP) items on the invoice and click the Paw Print Discount button. This will verify the WP codes on the invoice is part of the plan and the item is available. If after clicking the paw print discount a paw print does not appear in the Discount (Disc) column, the plan item has been either consumed and is no longer available in the plan, or the code does not match the type of plan in which the pet is enrolled.

Client Invoice for Rich Doggett - New

Client: Client ID: 17850, Name: Rich Doggett, Credit code: Cash/Ck/Cred/Debit, Last payment: 4/7/2015 \$17.00, Credit Card Payment

Invoice: Invoice number: [blank], Invoice type: <None>, Receptionist: CS, Cornerstone, Invoice total: \$86.45

Accounts receivable: Current: \$29.61, 30 days: \$0.00, 60 days: \$0.00, 90 days: \$0.00, A/R Total: \$29.61

Patient: Patient ID: 56545, Active Plan, Balance Due: \$116.06

| Patient ID | Name | Age | Weight | Sex | Breed | Status | Amount |
|------------|-------|---------------|--------------|---------------|---------------------|--------|--------|
| 56545 | Kevin | 4 Yrs. 8 Mos. | 10.70 pounds | Neutered Male | Shorthair, Domestic | Active | 86.45 |

Buttons: Post, Save, Prepay, Discount, Print, Email, Void, Cancel

| Item ID | Item Description | Quantity | Amount | Staff | Center | Disc | Tax | Date |
|---------|------------------------------|----------|-----------|-------|--------|------|-----|------------|
| 1 | WP1002 WP ANNUAL EXAM ADULT | 1.00 | \$53.05CS | H | | No | No | 01/11/2018 |
| 2 | WP2020 WP FVCP ANNUAL | 1.00 | \$28.00CS | H | | No | No | 01/11/2018 |
| 3 | WP2040 WP FELV ANNUAL | 1.00 | \$32.85CS | H | | No | No | 01/11/2018 |
| 4 | WP3000 WP FECAL EXAM | 1.00 | \$31.60CS | H | | No | No | 01/11/2018 |
| 5 | REVC1-5 REVOLUTION CAT 5-15# | 1.00 | \$22.00CS | H | | No | No | 01/11/2018 |
| 6 | | | | CS | | No | No | 00/00/0000 |

For any items not included in the plan that are subject to a discount, click the Discount button, select the appropriate Petly Plan Member discount, and click OK.

Client Invoice for Rich Doggett - New

Client: Client ID: 17850, Name: Rich Doggett, Credit code: Cash/Ck/Cred/Debit, Last payment: 4/7/2015 \$17.00, Credit Card Payment

Invoice: Invoice number: [blank], Invoice type: <None>, Receptionist: CS, Cornerstone, Invoice total: \$22.00

Accounts receivable: Current: \$29.61, 30 days: \$0.00, 60 days: \$0.00, 90 days: \$0.00, A/R Total: \$29.61

Patient: Patient ID: 56545, Active Plan, Balance Due: \$51.61

| Patient ID | Name | Age | Weight | Sex | Breed | Status | Amount |
|------------|-------|---------------|--------------|---------------|---------------------|--------|--------|
| 56545 | Kevin | 4 Yrs. 8 Mos. | 10.70 pounds | Neutered Male | Shorthair, Domestic | Active | 22.00 |

Buttons: Post, Save, Prepay, Discount, Print, Email, Void, Discount, Cancel

| Item ID | Item Description | Quantity | Amount | Staff | Center | Disc | Tax | Date |
|---------|------------------------------|----------|-----------|-------|--------|------|-----|------------|
| 1 | WP1002 WP ANNUAL EXAM ADULT | 1.00 | \$53.05CS | H | | No | No | 01/11/2018 |
| 2 | WP2020 WP FVCP ANNUAL | 1.00 | \$28.00CS | H | | No | No | 01/11/2018 |
| 3 | WP2040 WP FELV ANNUAL | 1.00 | \$32.85CS | H | | No | No | 01/11/2018 |
| 4 | WP3000 WP FECAL EXAM | 1.00 | \$31.60CS | H | | No | No | 01/11/2018 |
| 5 | REVC1-5 REVOLUTION CAT 5-15# | 1.00 | \$22.00CS | H | | No | No | 01/11/2018 |
| 6 | | | | CS | | No | No | 00/00/0000 |

Transaction Discounts

Transaction: REVC1-5 REVOLUTION CAT 5-15#

Add line discounts to all lines for this patient

Discounts to Apply:

- Litter Critter Grant 20.000%
- MEMBER 100% discount 100.000%
- OWNER DISCOUNT 80.000%
- PETCO 20.000%
- Petly Plan Member 10% discount 10.000%**
- Petly Plans 100% Discount 100.000%
- petly plans discount 100.000%

Buttons: OK, Cancel

Cornerstone will display a comment box to verify the discount should apply to the item. Click "Yes" to confirm and apply the discount.

Transaction Discounts

Warning: Discount "Petly Plan Member 10% discount" is not an applicable discount for this client! Do you wish to apply discount?

Buttons: Yes, No

The total amount due on the invoice will only include the non-plan items with or without an applicable discount. Cornerstone 8.6 NEXT auto discounts Wellness Plan (WP) invoice items at 100% automatically. View the total due today in the Accounts Receivable window.

| Accounts receivable | |
|---------------------|--------|
| Current: | \$0.00 |
| 30 days: | \$0.00 |
| 60 days: | \$0.00 |
| 90 days: | \$0.00 |
| A/R Total: | \$0.00 |

Balance Due: \$19.80

Click the Post button to post the invoice and collect the remaining balance.

| Accounts receivable | |
|---------------------|--------|
| Current: | \$0.00 |
| 30 days: | \$0.00 |
| 60 days: | \$0.00 |
| 90 days: | \$0.00 |
| A/R Total: | \$0.00 |

Balance Due: \$19.80

| Status | Amount |
|--------|--------|
| Active | 19.80 |

Post
Save
Prepay
Discount
Print
Email
Void
Discount
Cancel