

DVMAX[®] Best Practices for use with Petly Plans



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There are a few different configuration options from which to choose when working setting up DVMAX to work with Petly Plans. The following document outlines the recommended “best practice” setup steps to take in DVMAX for configuration.

Steps for Configuration – Overview

- 1- Create new Wellness Plan category
- 2- Create a new Staff Code for Petly Wellness Plan Discount
- 3- Create new bill codes for all items that could be part of a wellness plan group. These codes must start with WP, followed by a 3 or 4-digit number. Ensure reminders and inventory are linked appropriately.
- 4- Create an adjustable bill item for Petly Wellness Plan Discount. Set the default doctor as Petly Wellness Plan. *The code for this item should be all letters. For example, WPDC
- 5- Create Wellness Plan Parent Bill Items
- 6- Create Wellness Plan Super Items
- 7- Link new bill items to lab requisition codes (if necessary)

Steps for Configuration – Detailed

Create New Category

- 1- From the **Section** pull-down, choose **Inventory Management**
- 2- Search for **Item Category**
- 3- Click **Add New**
 - a. Category – WP
 - b. Description – Petly Wellness Plan
 - c. GL Account Code, Label, and Travel Sort can be left blank
- 4- Click **OK** to save

Create New Staff Code

- 1- From the **Section** pull-down, choose **Patient Codes**
- 2- Search for **Staff**
- 3- Click **Add New**
 - a. Staff Code – Petly
 - b. Staff Name and Staff List Name – Petly Wellness Plan Discount
 - c. All other sections can be left blank
- 4- Click **OK** to save

Create New Bill Items

- 1- From the **Section** pull-down, choose **Inventory Management**
- 2- Search for **Bill Items** by **Keyword in Description** (*helpful hint – search for the bill item you are recreating first to ensure all *items* are duplicated in the new code)
- 3- Once you have the existing bill code general information displayed, open a new bill item creation window
 - a. Section / **Inventory Management**

- b. Search for **Bill Items**
 - c. Click **Add New**
- 4- Create a New Bill Item
 - a. Bill Code - Must start with WP, followed by 3-4 numbers
 - b. Description – DVMAX recommends using the same description as the existing item, but prefacing it with WP-
 - c. Category – WP
 - d. Bar Code or Requisition Code – this is left blank. If the item is a lab item, the link will be done in the Requisitions Setup Wizard
 - e. All other items will be duplicated based on the configuration of the existing item (Be sure to check the configuration of the Patient Links and Notes Tab as well)
- 5- Click **OK** to save

Create an Adjustable Bill Item

- 1- From the **Section** pull-down, choose **Inventory Management**
- 2- Search for **Bill Items**
- 3- Click Add New
 - a. Bill Code - Must start with WP, followed by and additional 2-4 letters *Note: this bill code configuration differs from the others because we want to differentiate this item, which will always have a negative dollar amount, from the other 'WP' items that Petly Plans pulls from DVMAX
 - b. Description – Petly Wellness Plan Discount
 - c. Category – WP
 - d. Bar Code or Requisition Code – this is left blank.
 - e. Under Constraints/Attributes, check **Adjustable**
 - f. Under Constraints/Attributes, enter Petly as the **Default Dr.**
 - g. Click **OK** to save

Create Wellness Plan Parent Bill Items – These bill items will be the items added to the patient history/invoice that trigger the Super Items

- 1- From the **Section** pull-down, choose **Inventory Management**
- 2- Search for **Bill Items**
- 3- Click Add New
 - a. Bill Code - Must start with WP, followed by 3-4 numbers
 - b. Description – Create new bill items for each Wellness Plan group (Ex: Petly Puppy Health Plan – 8 week visit, Petly Puppy Health Plan – 12 week visit, etc)
 - c. Category – WP
 - d. Bar Code or Requisition Code – this is left blank.
- 4- Click **OK** to save

Create Wellness Plan Super Items

- 1- From the **Section** pull-down, choose **Inventory Management**
- 2- Click **Add New**

- a. Item Name – this is an internal name only – the name can be the same as the Parent Bill Item
- b. Parent Bill Item – this is the bill item that will trigger the Super Item to be displayed for the user to add to the patient history/invoice
- c. User selectable child items – checking this box will allow the user to choose which items to include
- d. Child items default to unselected – by checking the ‘user selectable child items’ this box will appear. Checking this option will force the user to check off each item that should be added to the history/invoice. Leaving this box unchecked will require the user to uncheck any items that should not be included.
- e. Add each item that will be part of the Wellness Plan Group (each visit will be its own Super Item).
- f. Be sure to add the Wellness Plan Discount bill item to each group

Link Bill Items to Requisition Codes – If any of the new WP bill items created should prompt for a lab requisition form, this step must be followed

- 1- From the **Section** pull-down, choose **General Management**
- 2- Click on **Utilities**
- 3- Choose **Requisitions Setup Wizard**
- 4- Select **Provider**
- 5- Click on **Billing Codes**
- 6- Search for the Bill Code
- 7- Double-click on the correct line, search for the lab code, and click Select

Invoicing a Client Using the Petly Configuration

When invoicing a client, the Petly Wellness Plan Super Item will be added to the patient medical history (if paperless), or the patient invoice. Before checking out, the Petly Wellness Plan Discount line item will be edited to discount the appropriate amount from the client’s invoice. Staff will need to add the total of each WP line item and enter a negative dollar amount with that total in the Price field. If any other discounts are given (example – 5% off heartworm or flea/tick preventative) this discount can also be added to the total line item discount.

Appendix A

DVMAX User Manual – Bill Items

For additional information about creating bill items, please refer to the Bill Items section of the DVMAX User Manual found on our knowledgebase -

<https://wiki.idexx.com/display/DVMXS/Bill+Items>

DVMAX Tech Support – 800-950-5455

Should you have any questions, please feel free to contact support