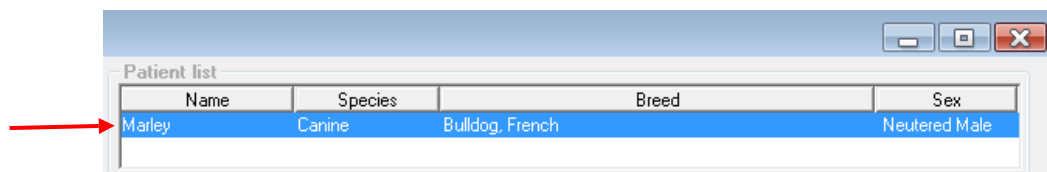


## Petly Plans: How to Enroll a Pet in a Plan

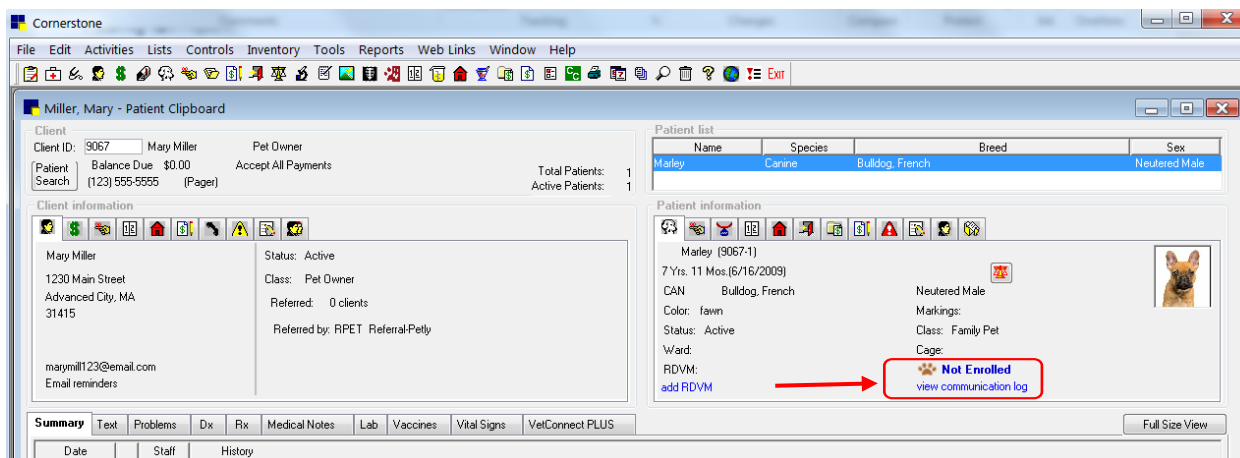
Use this step-by-step guide to help you enroll pets into Petly\* Plans preventive care plans with Cornerstone 8.6 NEXT.

Once you're in Cornerstone, follow these easy steps to ensure every pet is getting the very best care.

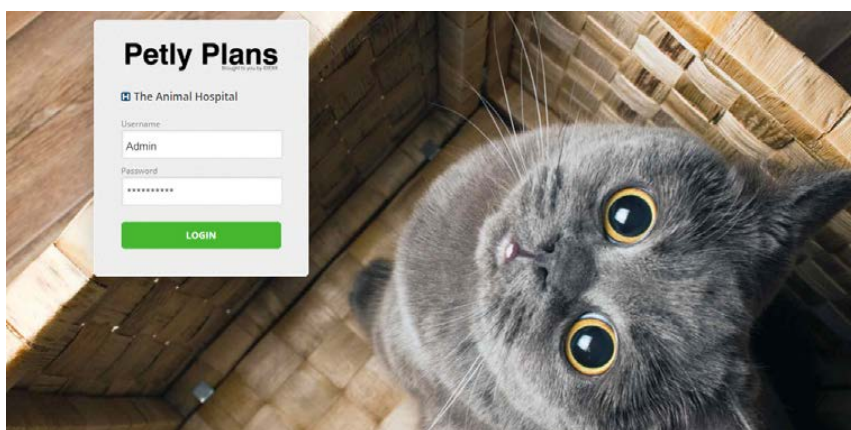
1. Search for the pet (by pet name *or* owner name *or* patient ID#). Example: Marley *or* Mary Miller *or* 9067-1
2. Select the pet's name in the Patient List.



3. From the Patient information screen, click the "Not Enrolled" paw print icon



4. Login to Petly Plans



5. Add a plan - in this window, you can see the owner's name, plan status and pet species
- a. Click + Add plan

Search...advanced

Help Me

Jessi Hancock

Client Summary Page

return to dashboard

Mary Miller

Client Administration

Client ID23473

ID9067

FirstMary

LastMiller

Home Address1230 Main Street  
Advanced City, MA 31415

Email Addressmarymil123@email.com

Marley

no active plan

Pet ID23432

ID9067-1

NameMarley

Microchipn/a

SpeciesCANINE

SexMale Neutered

Birth Date10/29/2008

Pet StatusActive

Merge Pet

This pet does not have an active plan

ADD PLAN

6. Review and select the best plan.

- a. To view items in each plan, click Base Items; a high-level list of each plan expands for easy comparison.
- b. Review the items in each plan, and then choose the one that most closely meets the pet's needs.
- c. Click the green button for the plan you want.



**Tip:** In the below step, you can add services to the plan.

PUPPY GOLD	PUPPY SILVER	PUPPY PLATINUM	CANINE SILVER	CANINE GOLD	CANINE PLATINUM
Initial Fee <b>\$99.95</b> one time	Initial Fee <b>\$99.95</b> one time	Initial Fee <b>\$99.95</b> one time	Initial Fee <b>\$99.95</b> one time	Initial Fee <b>\$99.95</b> one time	Initial Fee <b>\$99.95</b> one time
Monthly Payment <b>\$45.95 / month</b>	Monthly Payment <b>\$35.99 / month</b>	Monthly Payment <b>\$49.95 / month</b>	Monthly Payment <b>\$29.95 / month</b>	Monthly Payment <b>\$41.00 / month</b>	Monthly Payment <b>\$49.95 / month</b>
Discount <b>10.00 %</b>	Discount <b>3.00 %</b>	Discount <b>10.00 %</b>	Discount <b>3.00 %</b>	Discount <b>10.00 %</b>	Discount <b>10.00 %</b>
<a href="#">Base Items</a>	<a href="#">Base Items</a>	<a href="#">Base Items</a>	<a href="#">Base Items</a>	<a href="#">Base Items</a>	<a href="#">Base Items</a>
<div>WP100: WP Annual Examination - x 1 WP110: WP Examination (Co-Reg) - Unlimited WP115: WP Examination Pre-Anesthetic - x 1 WP120: WP Technician Office Call - Unlimited WP221: WP DA289-F+C Vaccine (PUPPY) - x 3 WP227: WP Bordetella Intranasal Vaccine PUPPY - x 3 WP231: WP Bordetella Inj Vaccine PUPPY - x 3 WP240: WP Rabies Vaccine 1 yr - x 1 WP311: WP Intestinal Par Srm (Puppy/Kitten) - x 2 WP401: WP Deworm (Puppy/Kitten) - x 2 WP503: WP Pre Surgical Bloodwork (SAB03) - x 1 WP590: WP Anesthesia Monitor Set Up - x 1 WP501: WP SRAV (Puppy) - x 1 WP710: WP Nail Trim - Unlimited WP801: WP Pain Mgmt Post Op (30-60 Sec) - x 1 WP100: WP Examination Annual - x 2</div> <div>Choose Puppy Gold</div>	<div>WP100: WP Annual Examination - x 1 WP110: WP Technician Office Call - Unlimited WP211: WP DA289-F+C Vaccine (PUPPY) - x 3 WP227: WP Bordetella Intranasal Vaccine PUPPY - x 3 WP240: WP Rabies Vaccine 1 yr - x 1 WP311: WP Intestinal Par Srm (Puppy/Kitten) - x 2 WP710: WP Nail Trim - Unlimited</div> <div>Choose Puppy Silver</div>	<div>WP110: WP Examination (Co-Reg) - Unlimited WP115: WP Examination Pre-Anesthetic - x 1 WP120: WP Technician Office Call - Unlimited WP211: WP DA289-F+C Vaccine (PUPPY) - x 3 WP227: WP Bordetella Intranasal Vaccine PUPPY - x 3 WP231: WP Bordetella Inj Vaccine PUPPY - x 3 WP240: WP Rabies Vaccine 1 yr - x 1 WP311: WP Intestinal Par Srm (Puppy/Kitten) - x 2 WP503: WP Pre Surgical Bloodwork (SAB03) - x 1 WP590: WP Anesthesia Monitor Set Up - x 1 WP720: Upstream included VET vgm group 70 - x 1 WP501: WP SRAV (Puppy) - x 1 WP110: WP Pain Mgmt Post Op (30-60 Sec) - x 1 WP410: WP Pain Mgmt Post Op (30-60 Sec) - x 1 WP801: WP Pain Mgmt Post Op (30-60 Sec) - x 1 WP200: WP C-Cellar - x 1 WP710: WP Nail Trim - Unlimited</div> <div>Choose Puppy Platinum</div>	<div>WP100: WP Annual Examination - x 1 WP110: WP Examination (Co-Reg) - Unlimited WP120: WP Technician Office Call - Unlimited WP223: WP Bordetella Inj Vaccine ADULT - x 2 WP225: WP Bordetella Intranasal Vaccine ADULT - x 2 WP231: WP DA289 Vaccine (Adult) - x 3 WP232: WP DA289 (No Legist Adult) - x 1 WP233: WP Parv Virus Vaccine (Adult) - x 1 WP240: WP Rabies Vaccine 1 yr - x 1 WP264: WP FVRCP ADULT - x 1 WP301: WP Blood Parasite Screen (TE10) - x 1 WP313: WP Intestinal Parasite Screen (Adult) - x 1 WP327: WP S/G BW/UA K9 (SAB25)Ref (SAB07) - x 1 WP710: WP Nail Trim - Unlimited</div> <div>Choose Canine Silver</div>	<div>WP100: WP Annual Examination - x 1 WP110: WP Examination (Co-Reg) - Unlimited WP115: WP Examination Pre-Anesthetic - x 1 WP120: WP Technician Office Call - Unlimited WP223: WP Bordetella Inj Vaccine ADULT - x 2 WP225: WP Bordetella Intranasal Vaccine ADULT - x 2 WP231: WP DA289 Vaccine (Adult) - x 1 WP232: WP DA289 (No Legist Adult) - x 1 WP233: WP Parv Virus Vaccine (Adult) - x 1 WP234: WP Canine Vaccine (Adult) - x 1 WP240: WP Rabies Vaccine 1 yr - x 1 WP301: WP Blood Parasite Screen (TE10) - x 1 WP313: WP Intestinal Parasite Screen (Adult) - x 1 WP327: WP S/G BW/UA K9 (SAB25)Ref (SAB07) - x 1 WP370: WP Dental Scale and Polish - x 1 WP380: WP Dental Anesthesia - x 1 WP390: WP Dental Monitoring/Suite Set Up - x 1 WP710: WP Nail Trim - Unlimited</div> <div>Choose Canine Gold</div>	<div>WP100: WP Annual Examination - x 1 WP110: WP Examination (Co-Reg) - Unlimited WP115: WP Examination Pre-Anesthetic - x 1 WP120: WP Technician Office Call - Unlimited WP223: WP Bordetella Inj Vaccine ADULT - x 2 WP225: WP Bordetella Intranasal Vaccine ADULT - x 2 WP231: WP DA289 Vaccine (Adult) - x 1 WP232: WP DA289 (No Legist Adult) - x 1 WP233: WP Parv Virus Vaccine (Adult) - x 1 WP234: WP Canine Vaccine (Adult) - x 1 WP240: WP Rabies Vaccine 1 yr - x 1 WP301: WP Blood Parasite Screen (TE10) - x 1 WP313: WP Intestinal Parasite Screen (Adult) - x 1 WP327: WP S/G BW/UA K9 (SAB25)Ref (SAB07) - x 1 WP370: WP Dental Scale and Polish - x 1 WP375: WP Dental Radiographs (Full Mouth) - x 1 WP372: WP Radiographs (2 Views) - x 1 WP380: WP Dental Anesthesia - x 1</div> <div>Choose Canine Platinum</div>

## 7. Customize the plan for the pet's individual needs.

- Click **+Add** to include an additional service, and then adjust the item quantity as needed. Choose items based on the best medical interest of the animal. Selected items are added to the Added Items section, and the cost is calculated into the fees above the plan overview.
- Add any additional services the pet requires.



**Tip:** If you need to remove a service, click **x Remove**

Client  
**Mary Miller**  
9067

Pet  
**Marley**  
9067-1

Plan  
**Canine Gold**

Initial Fee  
**\$99.95**  
one time

Monthly Fee  
**\$39.95**  
per month

Added Items  
**\$4.50**  
per month

=

Total  
**\$44.45**  
per month

Due Today  
**\$144.40**

### Add Additional Items

[cancel & return to dashboard](#)

BASE ITEMS				
Item ID	Description	Price	Qty	Total
WP100	WP Examination (Annual)	\$53.00	1	\$53.00
WP110	WP Examination (Co-Pay)	\$10.00	Unlimited	\$10.00
WP115	WP Examination Pre-Anesthetic	\$0.00	1	\$0.00
WP120	WP Technician Office Call	\$17.00	Unlimited	\$17.00
WP223	WP Bordetella Inj Vaccine ADULT <small>Adult Bord</small>	\$24.00	2	\$48.00
WP225	WP Bordetella IntraNasal Vaccine ADULT <small>Adult Bord</small>	\$24.00	2	\$48.00
WP231	WP DA2P(L) Vaccine (Adult) <small>Canine Distemper</small>	\$27.00	1	\$27.00
WP232	WP DA2P (No Lepto) Adult <small>Canine Distemper</small>	\$27.00	1	\$27.00
WP233	WP Parvo Virus Vaccine (Adult)	\$10.00	1	\$10.00
WP234	WP Corona Vaccine (Adult)	\$18.00	1	\$18.00
WP240	WP Rabies Vaccine 1 yr	\$12.00	1	\$12.00
WP301	WP Blood Parasite Screen (T615)	\$41.00	1	\$41.00
WP313	WP Intestinal Parasite Screen (Adult)	\$25.00	1	\$25.00
WP357	WP S/G BW/LA K9 (SA625)/Fei (SA607)	\$167.00	1	\$167.00
WP370	WP Dental Scale and Polish	\$95.00	1	\$95.00
WP380	WP Dental Anesthesia	\$155.00	1	\$155.00
WP385	WP Dental Monitoring/Suite Set Up	\$39.00	1	\$39.00
WP710	WP Nail Trim	\$12.00	Unlimited	\$12.00

ADDED ITEMS				
Item ID	Description	Price	Qty	Total
WP360	WP Thyroid T4 (T495)	\$54.00	<b>x Remove</b> 1 <b>+ Add</b>	\$54.00

AVAILABLE ITEMS				
Item ID	Description	Price	Qty	Total
WP290	WP Canine Influenza Vaccine	\$32.00	<b>+ Add</b>	\$32.00
WP353	WP Pre-Surgical Bloodwork (SA600)	\$89.00	<b>+ Add</b>	\$89.00
WP360	WP Thyroid T4 (T495)	\$54.00	<b>+ Add</b>	\$54.00

## 8. Review the plan fees with the pet owner.

- Review the fees located in the header ribbon at the top of the page.

Client  
**Mary Miller**  
9067

Pet  
**Marley**  
9067-1

Plan  
**Canine Gold**

Initial Fee  
**\$99.95**  
one time

Monthly Fee  
**\$39.95**  
per month

Added Items  
**\$4.50**  
per month

=

Total  
**\$44.45**  
per month

Due Today  
**\$144.40**

### Example:

- Initial fee for this practice: \$99.95. This is a one-time enrollment (or membership) fee to participate in the program.
- Monthly fee for this plan: \$39.95. This is the monthly cost for the base items in the plan.
- Added items: \$4.50. This is the monthly cost of any additional services included, beyond the base plan.
- Due today: \$144.40. This is the initial fee, plus the monthly fee, plus the cost for the added services.
- All subsequent months will cost the pet owner only the monthly fee and the added services (\$44.45).

b. Once you have reviewed and completed the plan, **click Options**.

Item ID	Description	Price	Qty	Total
WP360	WP Thyroid T4 (T495)	\$54.00	1	\$54.00

Navigation: Cancel, Back, Pet, Plan, Items, Options, Payment, Review. The 'Options' button is highlighted with a red box.



**Tip:** During the Review and Complete step, the Payment Information section outlines each payment and processing date.

## 9. Add options to the plan.

- a. Add any of the options below as needed; options can be selected or changed for each plan. In some cases, users with Staff access will require an administrator override to make changes during this step.

Options:

- Start date: This defaults to today's date; however, you can also backdate a plan here. Some practices offer up to 48 hours for pet owners to consider Petly Plans participation.
- Multi-pet discount: If your practice offers a discount on the initial enrollment fee for pet owners with more than one pet, you can enter in there. Enter the amount as a positive value.
- Paid in full: If a pet owner pays in full, mark it here.
- Waive initial fee: If the initial fee is being waived, mark it here.
- Notes: Enter any notes that other staff member should be made aware of. After selecting all needed options, **click Payment**.

Options

Start Date: 01/27/2017

Multi Pet Discount: 0.00

Paid in Full: ☐

Waive Initial Fee: ☐

Notes:

- b. After selecting all needed options, click Payment.

Options

Start Date: 01/27/2017

Multi Pet Discount: 0.00

Paid in Full: ☐

Waive Initial Fee: ☐

Notes:

Navigation: BACK, CANCEL, Pet, Plan, Items, Options, Payment, Review. The 'Payment' button is highlighted with a red box.

## 10. Add the payment method.

- a. Click +Add A New Payment Method.

Choose Payment Method

+ ADD A NEW PAYMENT METHOD

☐ Skip adding a payment method

This client has no payment profiles configured.

b. Complete the payment information form.

Important: We strongly recommend collecting two forms of unique payment, with the primary payment method being checking account (ACH draft).

**Helpful payment information:**

- ACH draft requires you to keep a copy of a voided check on file with the signed healthcare agreement.
- The AVS Mismatch box may appear if the entered address does not match the credit card or bank account address. Ask the pet owner where the card/bank statement is mailed.
- If pet owners elect to use a debit or credit card as the primary method of payment, your practice may charge a processing fee.
- Your practice settings will determine what types of credit cards are accepted
- The fields company, country, phone, fax can be left blank.

**Add a New Payment Method**

☒ Credit Card ☐ Bank Account (USA only)

Card Number:  \*

Expiration Date:  \* (mm/yy)

Card Code:  [What's this?](#)

**Billing Information**

First Name:

Last Name:

Company:

Address:

City:

State:  Zip:

Country:

Phone:

Fax:

c. When you have completed the payment section, click Review.

## 11. Review and complete the plan.

a. Review each section with the pet owner to ensure accuracy and that the pet owner understands the plan and payment details.

b. Click Complete.

**Client:** Mary Miller  
**Pet:** Marley  
**Plan:** Canine Gold  
**Initial Fee:** \$99.95  
**Monthly Fee:** \$39.95  
**Added Items:** \$4.50  
**Total:** \$144.40  
**Due Today:** \$144.40

**Review & Complete**

**WELLNESS PLAN INFORMATION**  
Plan Title: Canine Gold  
Effector Date: 11/19/2015 to 11/18/2016

**CLIENT INFORMATION**  
ID: 2729  
First Name: Mary  
Last Name: Miller  
Home Address: 1230 Main Street, Advanced City, MA 01415  
Email Address: nls

**PET INFORMATION**  
ID: 2729-1  
Name: Marley  
Breed: CANINE  
Sex: Neuter  
Birth Date: 06/15/2009

**PAYMENT INFORMATION**  
The following payment(s) are a breakdown of your Wellness Plan.

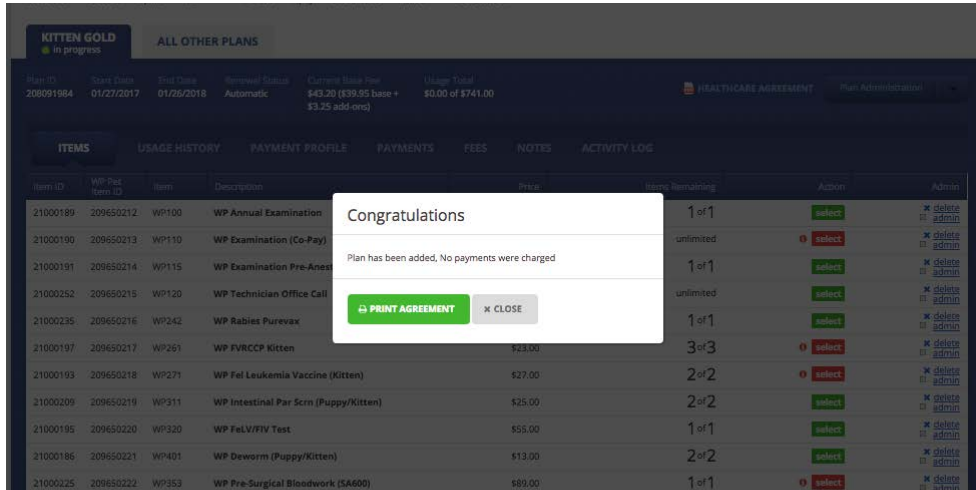
Due Date	Amount	Type	Status
2015-12-08	\$99.95	One Time Fee	Unpaid
2015-12-08	\$44.45	Monthly Fee	Unpaid
2016-01-20	\$44.45	Monthly Fee	Unpaid
2016-02-20	\$44.45	Monthly Fee	Unpaid
2016-03-20	\$44.45	Monthly Fee	Unpaid
2016-04-20	\$44.45	Monthly Fee	Unpaid
2016-05-20	\$44.45	Monthly Fee	Unpaid
2016-06-20	\$44.45	Monthly Fee	Unpaid
2016-07-20	\$44.45	Monthly Fee	Unpaid
2016-08-20	\$44.45	Monthly Fee	Unpaid
2016-09-20	\$44.45	Monthly Fee	Unpaid
2016-10-20	\$44.45	Monthly Fee	Unpaid
2016-11-20	\$44.45	Monthly Fee	Unpaid

**BASE ITEMS**

Item ID	Description	Price	Qty	Total
WP100	WP Examination (Annual)	\$53.00	1	\$53.00
WP110	WP Examination (Ex-Fee)	\$15.00	Unlimited	\$15.00
WP115	WP Examination Pre-Anesthetic	\$0.00	1	\$0.00
WP120	WP Technician Office Call	\$17.00	Unlimited	\$17.00
WP223	WP Bordetella Intranasal Vaccine ADULT	\$24.00	2	\$48.00
WP225	WP Bordetella Intranasal Vaccine ADULT	\$24.00	2	\$48.00
WP231	WP Canine Flea & Tick Prevention	\$27.00	1	\$27.00
WP232	WP Canine Flea & Tick Prevention	\$27.00	1	\$27.00

12. Print and sign the Healthcare Agreement.

- a. Click Print Agreement, and then print two copies of the Healthcare Agreement.



- b. Review the following with the pet owner and have the pet owner initial page 1 and sections 3 and 4 on page 2 and then sign the agreement.

Review with pet owner:

- This is not health insurance or property insurance.
- There is a nonrefundable membership fee.
- The plan will automatically renew each year.
- Items in the plan are administered to the pet based on the best medical interest of the animal.
- Draft of payment occurs on the 20th of every month.

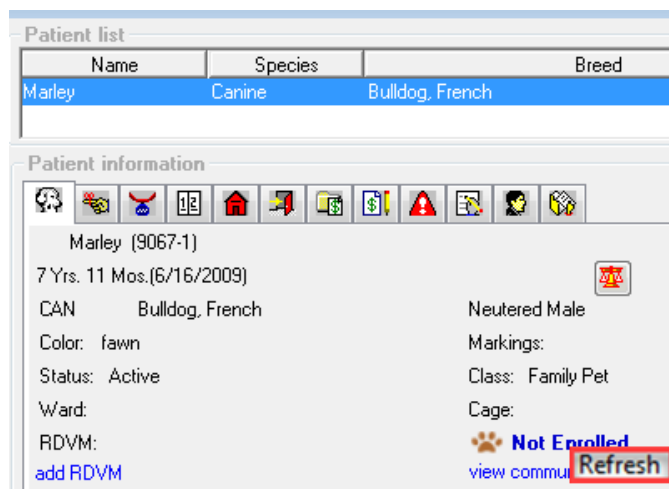
- c. Review the cancellation policy with the pet owner:

- Notice of cancellation must be provided in writing and 30 days in advance.
- If a plan is cancelled before the end of the year, the pet owner is responsible for the full cost of any services performed, but not yet covered by the plan payments made.

- d. Keep a signed copy of the healthcare agreement onsite at the practice for two years; your management team will let you know where to keep the contracts.

13. Return to pet's Patient Information tab in Cornerstone

14. Right click directly on the words "Not Enrolled" and select refresh to update the plan status in Cornerstone.





a. Plan will now show an active status.


**Patient list**

Name	Species	Breed	Sex
Marley	Canine	Bulldog, French	Neutered Male

**Patient information**

Marley (9067-1)  
 7 Yrs. 11 Mos. (6/16/2009)  
 CAN Bulldog, French Neutered Male  
 Color: fawn  
 Status: Active  
 Ward:  
 RDVM:  
[add RDVM](#)

Neutered Male  
 Markings:  
 Class: Family Pet  
 Cage:  
**Active Plan**  
[view communication log](#)



15. Right click pet's name from Patient list and select "Invoice" to open the invoice screen from the Patient Clipboard to begin an invoice.

**Cornerstone**

File Edit Activities Lists Controls Inventory Tools Reports Web Links Window Help

**Miller, Mary - Patient Clipboard**

Client: 9067 May Miller Pet Owner  
 Client ID: 9067 Balance Due: \$0.00  
 Patient Search: (123) 955-5555 (Page)

**Client information**

May Miller  
 1230 Main Street  
 Advanced City, MA 31415  
 maym123@email.com  
 Email reminders

Status: Active  
 Class: Pet Owner  
 Referred: 0 clients  
 Referred by: RPET Referral-Pelly

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

Date	Staff	History
4/22/2017	22	Preventive Care Member (COPAY) by MC
4/27/2017	22	1.00 WP Copay (WP1010) for \$0.00 by MC
4/27/2017	22	1.00 WP Examination Copay (2276) for \$20.00 by MC
4/11/2017	3	1.00 WP Exam - Annual Wellness (wP1002) for \$53.05 by MC
4/11/2017	3	1.00 WP Rabies 3 yr Canine (WP2510) for \$24.90 by MC
4/11/2017	3	1.00 WP DHPP 1 year (wP2530) for \$20.05 by MC
4/11/2017	3	1.00 WP Bordetella Booster (ORAL) (WP2560) for \$14.00 by MC

Rows 1 to 7 of 69

Find Find Next Go to Date Print History Preview

**Patient list**

Name	Species	Breed	Sex
Marley	Canine	Bulldog, French	Neutered Male

New  
 Update  
 Appointment Scheduler ...  
 Check-In ...  
 Correspondence ...  
 Diagnostics ...  
 Drug Interaction Matrix ...  
 Electronic Whiteboard  
 Estimate ...  
 Imaging  
**Invoice ...**  
 Lab Request ...  
 Medical Note ...  
 Medical Note Quick Text ...  
 New Case ...  
 Patient Advisor Exam ...  
 Patient Reports ...  
 Patient Visit List ...  
 Prescribe ...  
 Problems ...

16. Enter applicable Wellness Plan (WP) services 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.

**Cornerstone**

File Edit Activities Lists Controls Inventory Tools Reports Web Links Window Help

**Client Invoice for Rhonda Williams - New**

Client: 16055  
 Name: Rhonda Williams  
 Credit code: Accept All Payments  
 Last payment:

Invoice number: Open  
 Invoice type: Invoice - Plan Enrollee  
 Receptionist: MC  
 Michelle Campol, CVT, CVP  
 Invoice total: \$54.95

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

Balance Due: \$54.95

**Patient**

Patient ID: 65247 **Active Plan**

Patient ID	Name	Age	Weight	Sex	Breed	Status	Amount
65247	Marley	7 Yrs. 11 Mos.	0.00 pounds	Neutered Male	Bulldog, French	Active	\$4.95

**Item ID** **Item Description** **Quantity** **Amount** **Staff** **Center** **Disc** **Tax** **Date**

1	COPAY Preventive Care Member	14		H		No	No	05/16/2017
2	wP1010 WP Copay	1.00	\$0.00	14	H	No	No	05/16/2017
3	2276 WP Examination Copay	1.00	\$20.00	14	H	No	No	05/16/2017
4	wP2560 WP Bordetella Booster (ORAL)	1.00	\$14.00	14	H	No	No	05/16/2017
5	wP3000 WP Fecal Examination (Fotastat)	1.00	\$19.95	14	H	No	Yes	05/16/2017
6						No	No	00/00/0000

Rx Label Special Departing Pharmacy Make Appt Travel Sheet Copy To

Discount

Cornerstone

File Edit Activities Lists Controls Inventory Tools Reports Web Links Window Help

Client Invoice for Rhonda Williams - New

Client: Client ID: 16055 Name: Rhonda Williams Credit code: Accept All Payments Last payment:

Invoice: Invoice number: Open Invoice type: Invoice - Plan Enrollee Receptionist: MC Michelle Campoli, DVT, CVPM Invoice total: \$20.00

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

Patient: Patient ID: 65247 Active Plan Balance Due: \$20.00

Patient ID	Name	Age	Weight	Sex	Breed	Status	Amount
65247	Marley	7 Yrs 11 Mos.	0.00 pounds	Neutered Male	Bulldog, French	Active	20.00

Item ID	Item Description	Quantity	Amount	Staff	Center	Disc	Tax	Date
1	COPAY Preventive Care Member	14		H	No	No		05/16/2017
2	WP Copay	1.00	\$0.00	14	H	No	No	05/16/2017
3	2276 WP Examination Copay	1.00	\$20.00	14	H	No	No	05/16/2017
4	WP2560 WP Bordetella Booster (ORAL)	1.00	\$14.00	14	H	No	No	05/16/2017
5	WP3000 WP Fecal Examination (Flotation)	1.00	\$19.95	14	H	No	No	05/16/2017
6						No	No	00/00/0000

Ready

- a. 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.

## 17. Post invoice

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

### IDEXX Veterinary Hospital

idexx@idexx.com  
2536 Alpine Road  
Suite 103  
Eau Claire, WI 54703  
(800) 283-8386



Page 1 / 1

Rhonda Williams  
1230 Main Street  
Advanced City, MA 31415

Petty Plans Discount has been applied

Client ID: 16055  
Invoice #: 3877  
Date: 5/16/2017

 Patient ID: 65247  
Patient Name: Marley  
Species: Canine  
Breed: Bulldog, French

Weight: 06/16/2009  
Neutered Male

Description	Total
5/16/2017 * WP Copay	\$0.00
Preventive Care Member	\$20.00
* WP Bordetella Booster (ORAL)	\$14.00
* Parasite check	\$19.95
<b>Patient Subtotal:</b>	<b>\$53.95</b>
<b>Invoice Total:</b>	<b>\$53.95</b>
* Petty Plans 100% Discount:	(\$33.95)
Sales Tax :	\$0.00
<b>Total:</b>	<b>\$20.00</b>
Invoice Balance Due:	\$20.00
1-Cash :	(\$20.00)
Less Payment:	(\$20.00)
<b>Invoice Balance Due:</b>	<b>\$0.00</b>
<b>Balance Due:</b>	<b>\$0.00</b>