

Petly Plans Setup in AVImark



Purpose

This guide will serve as a high-level step-by-step tool to configure AVImark for Petly Plans. We will provide images, videos, written instructions, and best practice tips and resources to help your AVImark and Petly Plans workflow meet your practice's needs.



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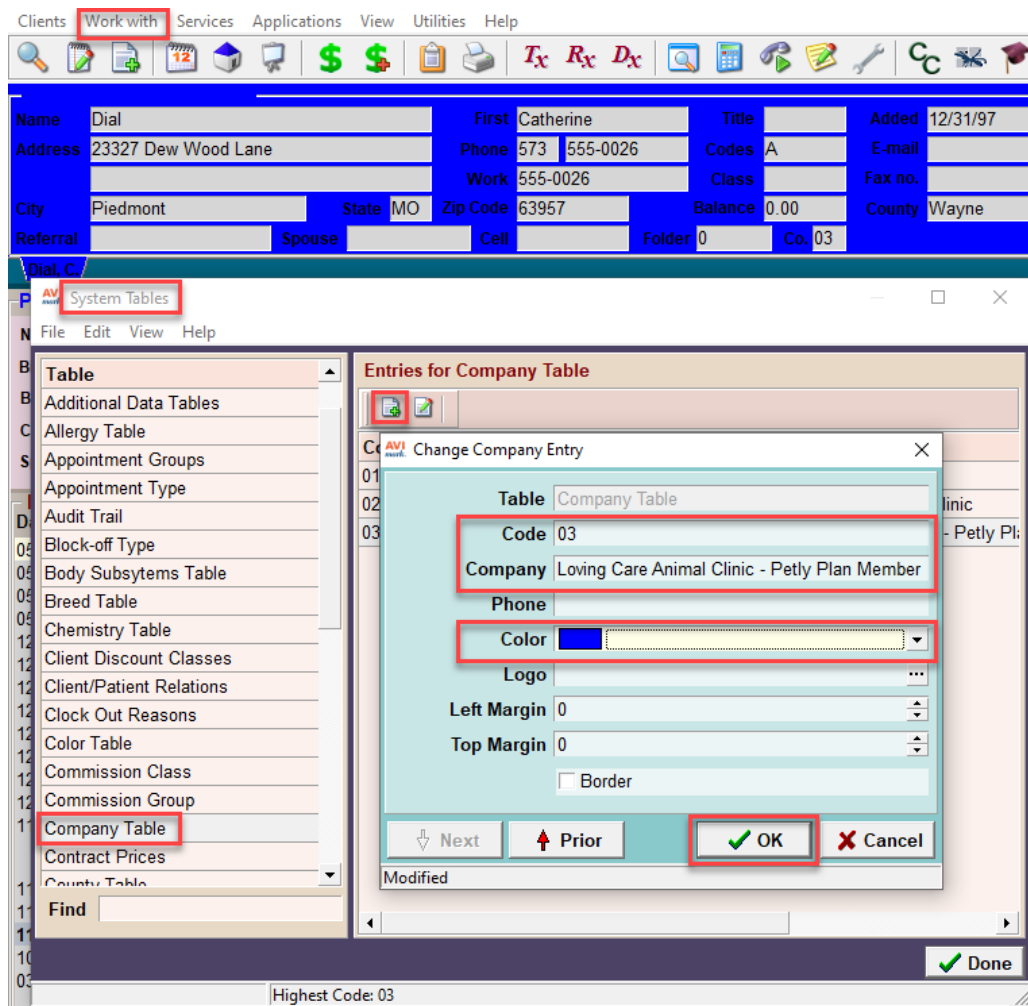


Creating a Company

Best Practice Tip: Use the “Company” feature to visually identify a plan member in AVImark. This will trigger staff to utilize WP codes on invoices for any pets enrolled in plans. Don’t forget to remove the visual reminder when or if the pet owner cancels the plan.

To Create a Company in AVImark:

- Select- Works With → System Tables → Company Tables → Add New → Assign Company Code, Company Description (practice name + Petly Plans Member) and Color → OK to save.



To Apply to a Client in AVImark:

- Right click on the client → Change → Update “Co.” to match the Company Code created for a plan member.

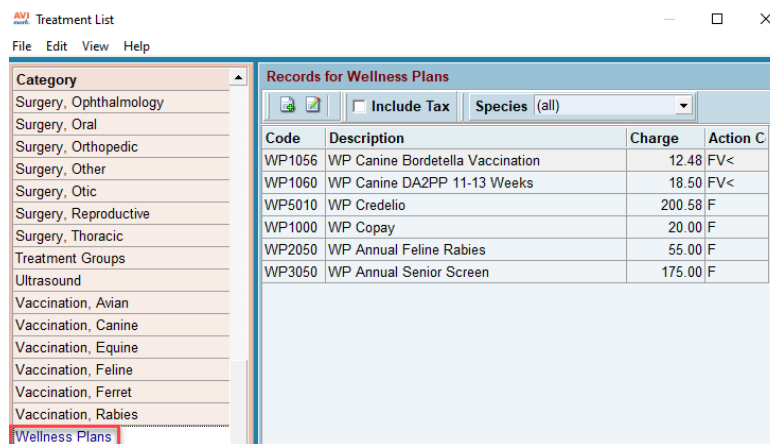


WP Code Prep Work

Best Practice Tip: Collaborate with another staff member to make WP code creation easier! Open AVImark on two separate workstations. One staff member will open the regular invoice code on their screen while the other will create the new WP code equivalent. This ensures all information is quickly replicated in your new WP codes.

Create a Treatment Category

- Works with → Treatment List → Add a new Treatment category (Wellness Plans) → Complete Setup → OK to save.

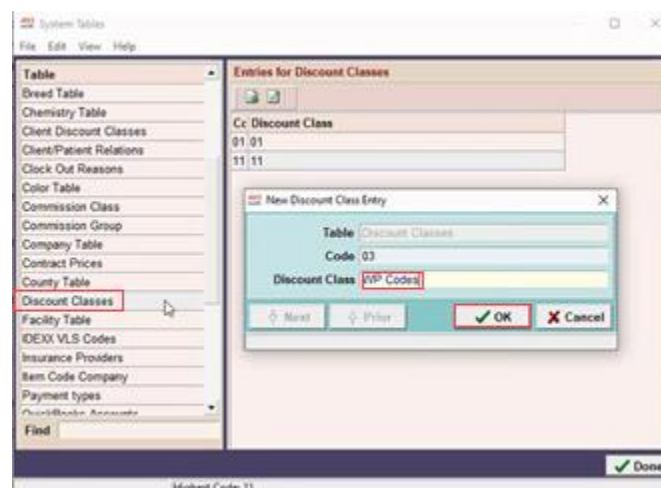


The screenshot shows the 'AVI Treatment List' window. On the left, a list of categories is shown, with 'Wellness Plans' highlighted. On the right, a table titled 'Records for Wellness Plans' displays the following data:

Code	Description	Charge	Action C
WP1056	WP Canine Bordetella Vaccination	12.48	FV<
WP1060	WP Canine DA2PP 11-13 Weeks	18.50	FV<
WP5010	WP Credelio	200.58	F
WP1000	WP Copay	20.00	F
WP2050	WP Annual Feline Rabies	55.00	F
WP3050	WP Annual Senior Screen	175.00	F

Create a Discount Class for WP Codes

- Works with → System Table → Discount Class → Add new → WP Codes → OK to save.



The screenshot shows the 'System Tables' window. The 'Discount Classes' table is selected in the left pane. A 'New Discount Class Entry' dialog box is open, showing the following fields:

- Table: Discount Classes
- Code: 03
- Discount Class: WP Codes

The dialog box has 'Next', 'Prior', 'OK', and 'Cancel' buttons. The 'Done' button is visible at the bottom right of the main window.



Creating WP Codes in AVImark

You will need a WP code for each of the Base and Optional items that are part of your plans. Your Implementation Manager will supply you with a list of suggestions for WP Codes. WP codes must follow the format of WP followed by 3-5 digits (ex, WP500, WP1000 etc). Replicate all tabs within the WP treatment code to match your currently existing treatment codes.

- The only field that should be different is the Discount Class → WP Codes

The screenshot shows the 'New Treatment' window in AVImark. The 'Discount Class' dropdown is highlighted with a red box and set to 'WP Codes'. Other fields include Code (WP2500), Description (WP Canine Rabies Vaccination), Charge (10.50), Action Codes (FVR<), Report Codes (V), List Codes, Cost (0.000), Appointment Time (0 min.), Markup Percent (0), Species 1 (Canine), Species 2 (none), Sex(es), Photo, Abbreviation, Form, Invoice, Journal, Doctor (none), Change Patient Status (None), Category (Anesthesia, Equine), and a checkbox for 'Print comments on invoice'.

Best Practice Tip: You can use the “Another” function in AVImark to replicate the first tab of the current treatment code. Search for the code you want to replicate, right click, and select “Another.”

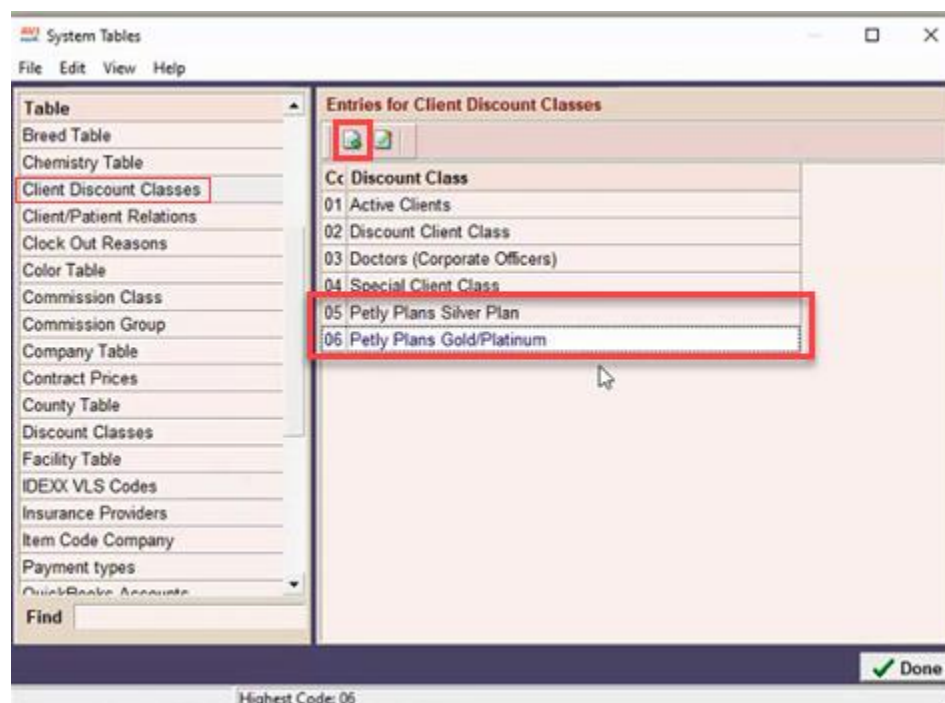
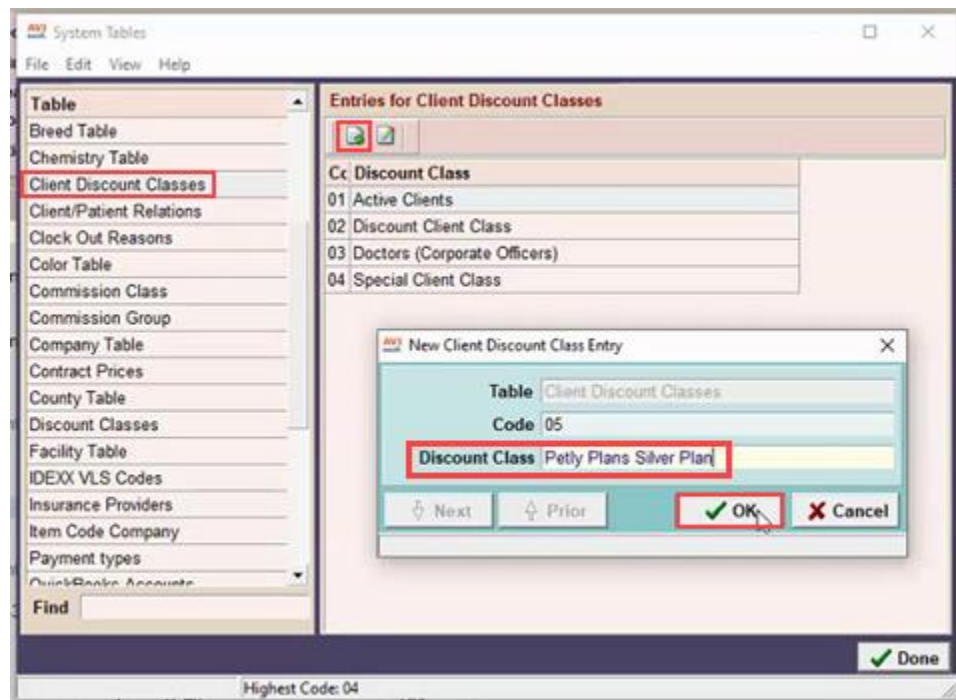
Code	Description	Charge	Action C
408	Canine Rabies Vaccination	10.50	FVR<

Context menu options: NEW (F2), CHANGE (F3), REMOVE (F4), Another... (Shift+F2).



Non-Plan Item Discounts

- If you offer a non-plan item discount, you can set this up to automatically discount items and services outside the plan.
 - Works with → System Tables → Client Discount Classes → Add a discount for each plan type → OK to save.



Non-Plan Item Discounts Continued

- Under Hospital Setup → Invoicing → Discounting → Create a discount for each plan type and choose “All” as the Discount Class. You will also want to set the rate to the corresponding non-plan discount (typically 5% or 10%).

The screenshot shows the 'Hospital Setup' window with the 'Discounting' tab selected. A 'New Discount Rate' dialog box is open, showing the following details:

- Client Class:** Petty Plans Silver Plan
- Discount Class:** (all)
- Rate:** 5.00
- Cost Plus:** ☐ All Sites

Red arrows point to the 'Client Class' and 'Discount Class' fields. The background window shows the 'Options' section with 'Non-discounted prices' and 'Print total discount' checked, and 'Line item discounts' unchecked. The 'Discount rates' table is also visible.

Client Class	Discount Class	Rate	Cost Plus	All Sites
Discount Client Class	01			
Discount Client Class	(all)	5.00		
Doctors (Corporate Office	01	100.00		
Doctors (Corporate Office	11	100.00		
Special Client Class	01	50.00		

- Then create a discount for each plan type and select WP Codes as the discount class. This rate will be set to 0%.

The screenshot shows the 'Hospital Setup' window with the 'Discounting' tab selected. A 'New Discount Rate' dialog box is open, showing the following details:

- Client Class:** Petty Plans Silver Plan
- Discount Class:** WP Codes
- Rate:** 0.00
- Cost Plus:** ☐ All Sites

A red arrow points to the 'Rate' field. The background window shows the 'Options' section with 'Non-discounted prices' and 'Print total discount' checked, and 'Line item discounts' unchecked. The 'Discount rates' table is also visible.

Client Class	Discount Class	Rate	Cost Plus	All Sites
Discount Client Class	01			
Discount Client Class	(all)	5.00		
Doctors (Corporate Office	01	100.00		
Doctors (Corporate Office	11	100.00		
Special Client Class	01	50.00		
Petty Plans Silver Plan	(all)	5.00		

Invoicing Options

This next section discusses the three main options for invoicing a pet owner in AVImark. Each method is outline below with images and video snippets to help you determine which will work best in your practice.

Negative Line Item

- A treatment code is created for use when invoicing Wellness Plan Members. Also, a “Wellness Plan” staff member can be created to put this charge under to accurately track commission.
- Staff calculate the total services covered by the plan and then input a negative amount to cover these services.
- The balance due will be paid out of pocket for the non-wellness plan items.
- Please review the [following video link](#) illustrating a negative line item invoice.

Enter payment

Date: 05-12-21 Type: visa payment Site: 0 (open)
Code: Visa payment
Amount: 14.25 Co: 4.25
Doctor: DRG David N. Sharp, DVM Entered by:
Signature:
Buttons: Done Cancel Help

INVOICE

Sugar Creek Veterinary
1000 N. Highway 100
Dew Wood Lane
Mont, MO 63957

"Our Goal Is To Make Your Pet Happy"

Printed: 05-12-21 at 4:04p
Date: 05-12-21
Account: 1
Invoice: (open)

For	Qty	Description	Price
05-12-21 Little Bit	1	WP Exam*	50.00
05-12-21	1	WP Rabies Vaccine*	30.00
05-12-21	1	WP Annual Bloodwork*	120.00
05-12-21	1	Heartgard 0-25lbs*	15.00 **
Total charges, this invoice...			215.00
**Total discount included: 0.75			
Your old balance...			0.00
Total payment(s) received			214.25
05-12-21		Petty Plans Coverage	200.00
05-12-21		Visa payment	14.25
Your new balance...			0.00

Reminders for: **Little Bit** (Weight: 11.1 lbs - 20y)

Date	Description	Last done
05-12-22	Wellness Plan Enrollment	
08-18-21	Canine Rabies Vaccination	03-14-12
08-18-21	Canine DA2PP Vaccination	12-03-10
08-18-21	Annual Physical Examination	11-11-13
08-18-21	Canine Bordetella Vaccination	11-11-13

The Doctors and Staff at Sugar Creek Veterinary would like to thank you for allowing us to care for your pets.

Payment Method

- A Payment Method (example: "Petly Plans Coverage") is added to the AVImark System tables to be used when invoicing Wellness Plan Members.
- During check out, staff will calculate the cost of rendered Wellness Plans services.
- They then select the payment method of "Petly Plans Coverage" from the drop down to cover those services.
- The balance due will be paid out of pocket for the non-wellness plan items.
- Please review the [following video link](#) illustrating an invoice with a Petly Plans payment method.

Invoice

Invoice Tools Insurance

Date: 05-12-21 *Loving Care Animal Hospital* Invoice no. (open)

Sold To: Catherine Dial
23327 Dew Wood Lane
Piedmont, MO 63957
(573) 555-0026

SSN:
D/L:

Patients: Little Bit 214.25

Date	Patient	Code	Description	Qty	Amount
05-12-21	Little Bit	3333	Heartgard 0-25lbs	1	14.25
05-12-21	Little Bit	WP4000	WP Annual Bloodwork	1	120.00
05-12-21	Little Bit	WP2000	WP Rabies Vaccine	1	30.00
05-12-21	Little Bit	WP1000	WP Exam	1	50.00

Enter payment

Date: 05-12-21 Type: Petly Plans Coverage Site: 0

Ref #

Amount: 200.00 Co

Doctor: DNS: David N. Sharp, DVM Entered by

Signature Done Cancel Help

HP LaserJet Pro

Balance: 0.00

Hospital

INVOICE

"Our Goal Is To Make Your Pet Happy"

Printed: 05-12-21 at 4:04p
Date: 05-12-21
Account: 1
Invoice: (open)

Qty	Description	Price
05-12-21	Little bit	
1	WP Exam*	50.00
1	WP Rabies Vaccine*	30.00
1	WP Annual Bloodwork*	120.00
1	Heartgard 0-25lbs*	15.00 **
Total charges, this invoice...		215.00
**Total discount included: 0.75		
Your old balance...		0.00
Total payment(s) received		214.25
05-12-21	Petly Plans Coverage	200.00
05-12-21	Visa payment	14.25
Your new balance...		0.00

Reminders for: Little Bit (Weight: 11.1 lbs - 20y) Last done

05-12-22	Wellness Plan Enrollment	
08-18-21	Canine Rabies Vaccination	03-14-12
08-18-21	Canine DA2PP Vaccination	12-03-10
08-18-21	Annual Physical Examination	11-11-13
08-18-21	Canine Bordetella Vaccination	11-11-13

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100% Automatic Discount on all WP Codes

- A 100% Discount is created and added under the Wellness Plan Classification for each pet.
- The classification will automatically discount all WP Codes to \$0.00 when added to the medical history.
- If you are using the AVImark Wellness Plan feature, this will automatically activate the discount when the plan is added.

PATIENT: Little Bit

Name	Little Bit	Codes		Sex	S	Added	08-07-94
Birthdate	01-31-20	Age	17m	Rabies	62543	Reminded	02-12-10
Breed	Dachshund, Miniature	Plan	WPSILV 06-30-22	Deceased	(none)		
Color	Red	Weight	11.05	in	lbs	Microchip	
Species	Canine	Allergy	(none)	Relation	(none)		

Medical History

Date	Time	Dr.	Type	Code	Description	Qty	Amount	By	Photo	Public?
06-30-21	11:27a	DNS	T	505	Radiograph, Primary View	1	62.07			Yes
06-30-21	11:27a	DNS	T	WP4000	WP Annual Bloodwork	1	0.00			Yes
06-30-21	11:27a	DNS	T	WP2000	WP Rabies Vaccine	1	0.00			Yes
06-30-21	11:27a	DNS	T	WP1000	WP Exam	1	0.00			Yes
06-30-21	11:27a	DNS	T	WPSILV	WP Silver Wellness Plan	1	0.00			Yes

AVI Invoice

Invoice Tools Insurance

Date: 06-30-21 **Loving Care Animal Hospital** Invoice no. (open)

Sold To: Catherine Dial
23327 Dew Wood Lane
Piedmont, MO 63957
(573) 555-0026

SSN:
D/L:

Patients: Little Bit 62.07

Date	Patient	Code	Description	Qty	Amount
06-30-21	Little Bit	505	Radiograph, Primary View	1	62.07
06-30-21	Little Bit	WP4000	WP Annual Bloodwork	1	0.00
06-30-21	Little Bit	WP2000	WP Rabies Vaccine	1	0.00
06-30-21	Little Bit	WP1000	WP Exam	1	0.00
06-30-21	Little Bit	WPSILV	WP Silver Wellness Plan	1	0.00

Balance: 0.00 Charges: 62.07 Tax: 0.00 Payments: 0.00 New balance: 62.07

HP LaserJet Professional P1102w Letter Copies 1 Preview Include notes

Print Email Close Quit Help

INVOICE

Loving Care Animal Clinic
Creek Road
MO 63957
73

"Our Goal Is To Make Your Pet Happy"

Catherine Dial
327 Dew Wood Lane
Piedmont, MO 63957

Printed: 06-30-21 at 11:33a
Date: 06-30-21
Account: 1
Invoice: (open)

For	Qty	Description	Price
Little Bit	1	WP Silver Wellness Plan*	0.00
	1	WP Exam*	50.00 **
	1	WP Rabies Vaccine*	30.00 **
	1	WP Annual Bloodwork*	120.00 **
	1	Radiograph, Primary View*	65.34 **
Total charges, this invoice...			265.34
**Total discount included: 203.27			
Your old balance...			0.00
Total payment(s) received...			62.07
06-30-21 Visa payment			62.07
Your new balance...			0.00

Reminders for: **Little Bit** (Weight: 11.1 lbs - 17m) Last done

06-30-22	WP Silver Wellness Plan	06-30-21
08-18-21	Canine Rabies Vaccination	03-14-12
08-18-21	Canine DA2PP Vaccination	12-03-10
08-18-21	Annual Physical Examination	11-11-13
08-18-21	Canine Bordetella Vaccination	11-11-13

The Doctors and Staff at Sugar Creek Veterinary would like to thank you for allowing us to care for your pets.



100% Automatic Discount Setup

- Under Hospital Setup → Invoicing → Discounting → Create a discount for each plan type and choose “WP Codes” as the Discount Class. Set this to 100%
- For each WP code, make sure to have the Charge and Cost fields match in price for reporting purposes.

Client Class	Discount Class	Rate	Cost Plus
Silver Plan	(all)	5.00	<input type="checkbox"/>
Silver Plan	Wellness Plans	100.00	<input type="checkbox"/>
Gold Plan	(all)	10.00	<input type="checkbox"/>
Gold Plan	Wellness Plans	100.00	<input type="checkbox"/>
Platinum Plan	(all)	10.00	<input type="checkbox"/>
Platinum Plan	Wellness Plans	100.00	<input type="checkbox"/>

Setting Patient Classification for Automatic Discounting without the Wellness Plan Feature

Right Click in the Patient Area → Change → update the Class to be the appropriate plan type (created in earlier steps until System Tables)

AVImark Wellness Plan Feature and Petly Plans

Using the AVImark Wellness Plan feature gives you the ability to track enrollment dates, generate reminders and automatically set a non-plan discount.

- Create a Treatment Code for each plan type (Silver, Gold, Platinum). This doesn't have to be a WP Code.
 - Add a reminder for every 12 months for this same Treatment Code.
 - Add a Plan Entry of the same Treatment Code.
 - Change the Courtesy discount to the corresponding Non-plan discount.

The screenshot shows the 'Plan Entries' tab in the AVImark software. The main table lists plan entries with columns: Code, Description, HistoryType, Count, Minimum, and Cost. The first entry is 'SILVERP' for 'Silver Wellness Plan' with a count of 1 and a cost of 0.00. A red arrow points to this entry. Below the table, there are fields for 'Auto-renew', 'Include Tag Alongs', 'Calculate Plan Charge', 'First Payment', 'Courtesy Charge', 'Courtesy Class', 'Courtesy Rate', 'Term Count', and 'Total Plan Amount'. The 'Courtesy Class' dropdown menu is open, showing options: (none), Active Clients, Discount Client Class, Doctors (Corporate Officers), Special Client Class, Petly Plans Silver Plan, and Petly Plans Gold/Platinum. A red arrow points to 'Petly Plans Silver Plan'. At the bottom, there are 'OK' and 'Cancel' buttons.

The screenshot shows the patient record for 'Little Bit'. The 'Plan' field is highlighted with a red box, showing 'WPSILV 06-29-22'. The 'Reminders' tab is selected, showing a list of reminders with dates. The patient information includes Name, Birthday, Breed, Color, Species, Codes, Rabies, Sex, Added, Reminded, Deceased, Weight, In lbs, Microchip, and Relation.

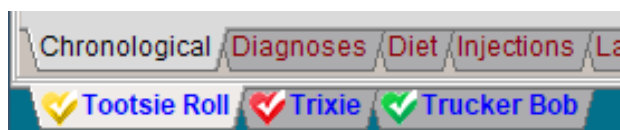
Code	Description	Date
408	Canine Rabies Vaccination	08-18-21
406	Canine DA2PP Vaccination	08-18-21
401	Canine Bordetella Vaccination	08-18-21
202	Annual Physical Examination	08-18-21
WPSILV	WP Silver Wellness Plan	06-29-22





Plan Indicator in AVImark




For Practices with AVImark 18.21.0 or higher you can set up a plan indicator to tell you the status of each plan.

- **Green:** Active
- **Yellow:** Expires within 30 days
- **Red:** Expired
- To set this up:
 - Search under the Wrench “Wellness Plan Indicator”:
 - Set Display Wellness Plan Indicators to True to activate the icons in AVImark.
 - Set Display Expired Wellness Plan Indicators for Number Days to how long the practice chooses to see the expired icons (red).





PATIENT: Trucker Bob  

Name	Trucker Bob	Codes		Sex	M
Birthday	08-09-18	Age	8w	Rabies	
Breed	Basset Hound	Plan	PUPPLAN 10-04-19		
Color	Brindle	Weight	6.53	in	lbs
Species	Canine	Allergy	(none)		

Time	Dr. N. L'Heureux
10:00a	"Trucker Bob(C)", Bakerville 
10:20a	"Tootsie Roll(C)", Bakerville 
10:40a	"Trixie(C)", Bakerville 

AVI mark Change Appointment

Treatments Opening

Date	10/05/18	Time	10:00a	Created	10-04-18	Tx, Items, Dx & Problems
Doctor	NL: Nikki L'Heureux, DVM	by	JLD			
Room	(all)	Minutes	20			
Client	Bakerville, Beth	Phone	573 -223-3676			
Patient	Trucker Bob  	Species	Canine			
Breed	Basset Hound	Weight	6.53 lbs	Type	Puppy Wellness	

Notes...

Reminders...

Patient Name

<No data to display>

☒ Unconfirmed
 ☐ Confirmed
 ☐ Left message

New Client
 New Patient
 Done
 Remove
 Quit
 Help



Invoicing Tips and Resources

- Review a patient's plan in Petly Plans before their visit to view their remaining Wellness Plan items.
- Use the "Select" feature to create a treatment plan and add up Wellness Plan Services that were invoiced: [Select Feature in Petly Plans](#).
- The [following video link](#) illustrates a negative line item invoice.
- The [following video link](#) illustrates an invoice with a Petly Plans payment method.
- Add a special image to the patient record to indicate they are on a plan.
- Use Reminders to notify clients of their plan renewal. (If not using the AVImark Wellness Plan feature).
- For questions on reporting, commission, and reminders, please call AVImark Support 1-877-838-9273 (Option 1).

