

Invoicing Petly Plans in Cornerstone

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

- 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, verify the pet owner has an Active Plan in progress by reviewing the plan status paw print.

Doggett, Rich - Patient Clipboard

Client ID: 17850 Rich Doggett Pet Owner
 Patient Search: (360) 420-7663 (Cellular) Cash/Ck/Cred/Debit
 Total Patients: 1
 Active Patients: 1

Client information

Rich Doggett
 12055 Hilynn Drive
 Burlington, WA 98233
 katdog33@gmail.com
 Email reminders

Status: Active
 Class: Pet Owner
 Referred: 0 clients
 Referred by: 14788 Source: Parker Way Vet Clinic
 Home Practice: BUR

Patient list

Name	Species	Breed	Sex
Kevin	Feline	Shorthair, Domestic	Neutered Male

Patient information

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
[view communication log](#)

Summary

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	clientreward - 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	wellness 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 BABIES (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 5-15# (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	clientreward - 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

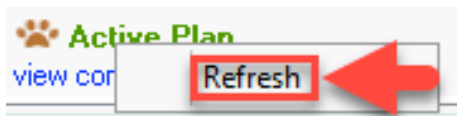
Rows 1 to 25 of 120

Find Find Next Go to Date Print History Preview

IDEXX-PACS Images Unavailable Full Size View

☐ Hide Whiteboard Notes ☒ Hide voided items

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

Petty Plan for Kevin (56545)
Client: Rich Doggett

Adult Feline Plan - In Progress

Start Date 07/20/2017 **End Date** 07/19/2018 **Non-Plan Discount** 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 Cash/Crd/Debit
Search: (360) 420-7663 (Cellular)

Client information:
Rich Doggett
12055 Hyllyn Drive
Burlington, WA 98233
kaldog33@gmail.com
Email reminders

Status: Active
Class: Pet Owner
Referred: 0 clients
Referred by: 14788 Source: Parker Way Vet Clinic
Home Practice: BUR

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

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Rows 1 to 25 of 120

Find 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

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☐ Hide Whiteboard Notes ☒ Hide voided items

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.

The screenshot shows the 'Client Invoice for Rich Doggett - New' window. The 'Client' section includes Client ID: 17850, Name: Rich Doggett, Credit code: Cash/Ck/Cred/Debit, Last payment: 4/7/2015 \$17.00, and Credit Card Payment. The 'Patient' section includes Patient ID: 56545, Name: Kevin, Age: 4 Yrs. 8 Mos., Weight: 10.70 pounds, Sex: Neutered Male, Breed: Shorthair, Domestic, Status: Active, and Amount: \$86.45. The 'Invoice' section includes Invoice number, Invoice type: <None>, Receptionist: CS, Cornerstone, and Invoice total: \$86.45. The 'Accounts receivable' section includes Current: \$29.61, 30 days: \$0.00, 60 days: \$0.00, 90 days: \$0.00, and A/R Total: \$29.61. The 'Balance Due' is \$116.06. A table lists items: 1 WP1002 WP ANNUAL EXAM ADULT, 2 WP2020 WP FVCP ANNUAL, 3 WP2040 WP FELV ANNUAL, 4 WP3000 WP FECAL EXAM, and 5 REVC1-5 REVOLUTION CAT 5-15#. The 'Discount' button is highlighted with a red arrow.

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.

The screenshot shows the 'Client Invoice for Rich Doggett - New' window with the 'Transaction Discounts' dialog box open. The dialog box lists discounts to apply: Litter Critter Grant (20.00%), MEMBER 100% discount (100.00%), OWNER DISCOUNT (80.00%), PETCO (20.00%), Petly Plan Member 10% discount (10.00%), Petly Plans 100% Discount (100.00%), and petly plans discount (100.00%). The 'Petly Plan Member 10% discount' is highlighted. The 'OK' button is highlighted with a red box. The background window shows the same invoice details as the previous screenshot, but the 'Discount' button is no longer highlighted.

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

The screenshot shows the 'Transaction Discounts' dialog box with a warning message: "Discount 'Petly Plan Member 10% discount' is not an applicable discount for this client! Do you wish to apply discount?". The 'Yes' button is highlighted with a red box.

The total amount due on the invoice will only include the non-plan items with or without an applicable discount. Cornerstone 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
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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
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Status	Amount
Active	19.80

Post

Save


Prepay

Discount

Print

Email

Void

 Discount

Cancel