

### Removing Previous Discounts before Using Petly Plans Automatic Discounting with Cornerstone

If you have previously attached 100% wellness plan discounts to invoice items, you should manually **remove** these previous discounts before using Petly Plans automatic discounting.

#### Here's why:

The previous discounts will be removed whenever Petly Plans automatic discounting is applied to invoice items.

**However**, the previous discounts will **not** be removed whenever the Petly Plan discounts cannot be applied, for example when:

- The client has reached the quantity limit for the Petly Plans item covered under their plan.
- The item is not covered under Petly Plans.
- The client is not a Petly Plans subscriber.

Manually removing the previous discounts ensures that these discounts won't be applied in error.

Removing the previous discounts requires three steps:

1. Remove the previous discount from each Petly Plans invoice item.
2. Remove the previous discount from each Petly Plans client record.
3. Inactivate the previous discount.

#### Here's how to accomplish the tasks above:

1. Remove the previous discount from **each Petly Plans (WP code) item**.
  - a. Go to **Lists > Invoice Item**, and then search for the plan items.

**Tip:** If all plan items are set up under a single class (e.g., WP), enter the class ID in the **Classification** field on the Invoice Item List window.

The screenshot shows the 'Invoice Item List' window. At the top, there's a search bar with 'Classification: WP' and 'Wellness Plan' entered. Below this, there's a table with columns: Description, Classification, Price, ID, Type, and a status column with green and red dollar signs. The table lists various wellness plan items like 'WP Blood Pressure Check', 'WP Bordetella Booster (ORAL)', etc. On the right side, there are checkboxes for 'Include' (Group items, Inventory items, Service items, Pick items, Dispensing items, Inactive items) and buttons for 'New', 'Update', 'Delete', 'Select', and 'Close'.

Description	Classification	Price	ID	Type	Status
WP Blood Pressure Check	Wellness Plan	\$27.75	WP8256	S	\$
WP Bordetella Booster (ORAL)	Wellness Plan	\$14.00	WP2560	S	\$
WP Bordetella First vaccine	Wellness Plan	\$14.00	WP1101	S	\$
WP Copay	Wellness Plan	\$0.00	WP1010	S	\$
WP DA2 PP with lept	Wellness Plan	\$28.50	WPDL3	S	\$
WP DA2P/CPV First Vaccine	Wellness Plan	\$23.00	WP1121	S	\$
WP DA2P/CPV Second Vaccine	Wellness Plan	\$23.00	WP1122	S	\$
WP DA2P/CPV Third Vaccine	Wellness Plan	\$23.00	WP1123	S	\$
WP DA2PP booster vaccine	Wellness Plan	\$23.00	WPDA2	S	\$
WP Dental Grade 2 Feline	Wellness Plan	\$128.81	WPDG2F	S	\$

- b. Select an item, and then click **Update**.

- c. On the Tax/Discount tab, deselect your 100% plan discount and then click **OK**.

Invoice Item Information for WP Exam - Annual Wellness

ID: WP1002 WP Exam - Annual Wellness

Info Instructions Reminders **Tax/Disc** Link Items Spec. Actions Travel Whiteboard

Sales tax to apply

Tax	%
County tax	2.500%
Internal Sales (Usage) Tax	5.000%
Sales Tax	5.000%

Usage tax to apply

Tax	%
County tax	2.500%
Internal Sales (Usage) Tax	5.000%
Sales Tax	5.000%

Discounts to apply

Discount	%
Petty Plans 100% Discount	100.00%
Professional Discount	15.00%
Public Service Discount	10.00%
Senior Citizen Discount	5.00%
<b>Wellness Plan</b>	<b>100.00%</b>

Click highlighted discount to deselect

- d. Repeat these steps for each WP code item.

**Tip:** You can use Mass Markup to remove the discount from all items, but you must have exclusive use of the Cornerstone database to do so (everyone else must be logged off).

2. Remove the previous plan discount **from every client record**.

- a. To identify clients who have discounts, use the Client Discount report (**Reports > Client**), sorted by discount, with a range based on your discount plan name.

Client Discounts

Sort order

Discount

Range

Description	Starting value	Ending value	And/Or
Client Discount	well	wem	

Press F1 for help

Preview

Print

Save As

Close

- b. From the Patient Clipboard\*, search for and select a client.
- c. Right click the **Client ID**, select **Update**, and then select the **A/R Information** tab.
- d. In the Discount area, deselect the previous discount and then click **OK**.

Client Information for Gary & Linda Adams

Client ID: 1902 Gary & Linda Adams Client balance: \$0.00

Information Prompts/Notes Referrals **A/R Information**

Applicable discounts

Discount	%
Military/Veteran Services Disc	10.00%
Petty Plans 100% Discount	100.00%
Professional Discount	15.00%
Public Service Discount	10.00%
Senior Citizen Discount	5.00%
<b>Wellness Plan</b>	<b>100.00%</b>
Wellness Plan add-on	10.00%

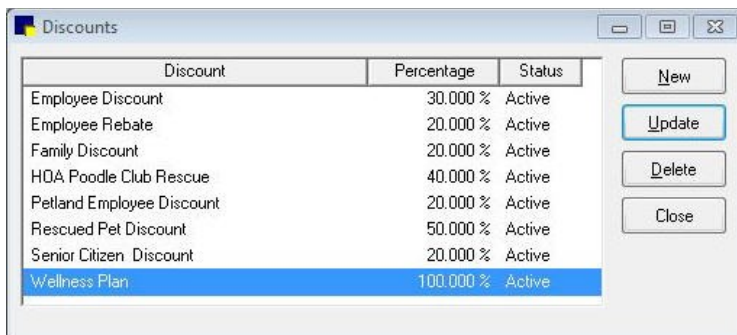
Practice affiliation

Client is ☒ not an employee ☐ a staff member ☐ a doctor on staff

click highlighted discount to deselect

- e. Repeat these steps for each client with the previous discount plan.

3. **Inactivate the previous plan discount** to ensure it is not manually applied to nonplan items in error.
  - a. Go to **Controls > Discounts**.
  - b. Select the discount, and then click **Update**.



- c. Set the Status to **Inactive** and then click **OK**.

