## INTEGRATING PETLY PLANS AND CORNERSTONE
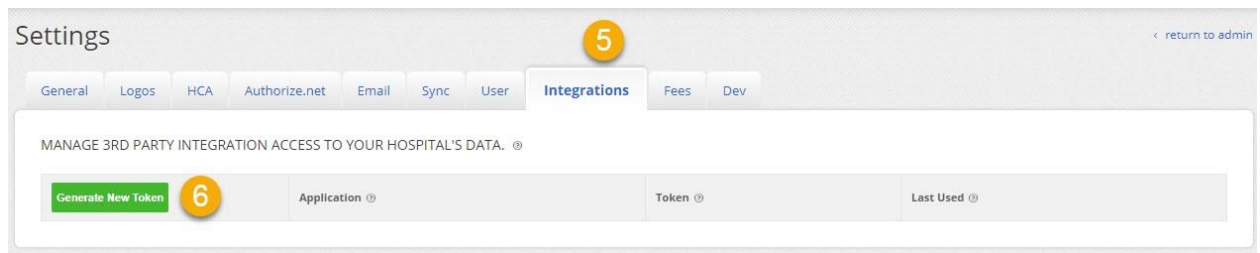
P Petly Plans and Cornerstone an integrate, which allows for all wellness plan (WP) codes to be automatically discounted 100% upon invoicing.

P Tool Tips:
   o Regenerate Button: Create a new token to be used by the third-party application to communicate with Petly Plans. This new token must be provided to the third-party to continue communications.
   o Revoke button: Deny the listed third-party application access to the Petly Plans data.
   o Application: The name used to identify the third-party application using the listed token to communicate with Petly Plans.
   o Token: The unique token used by the third-party application to access Petly Plans data.
   o Last Used: The last time the token was used to access the application.
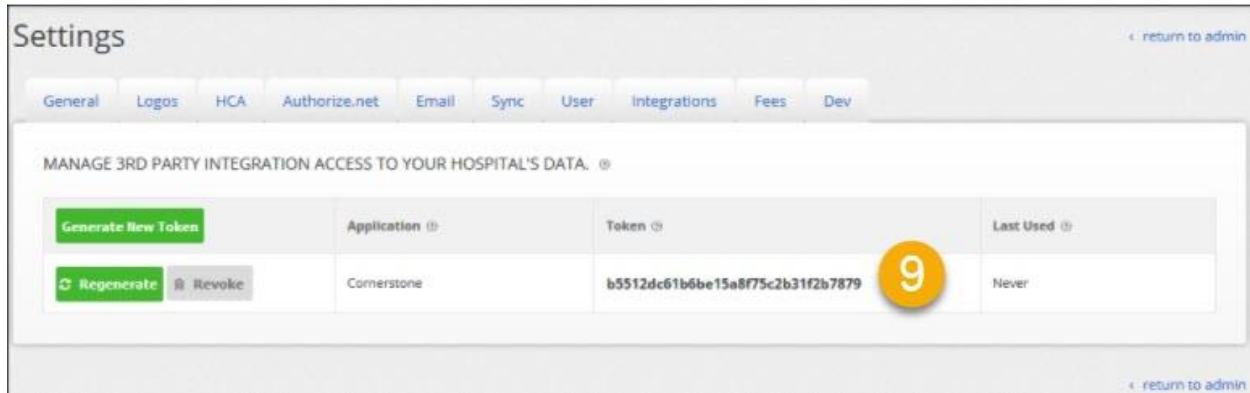   o User Role: Can only be performed with Super Admin or Admin user rights.

1. Log in to the desired hospital portal, as an Admin or Super Admin.
2. Place the mouse pointer over the menu icon, located at the top left of the screen.
3. From the list of available options select Admin
4. From the list of available options select Portal Settings
5. Locate the Integrations Tab
6. Select Generate New Token



7. Within the Third-Party Application Box type in Cornerstone
   • Important: Petly Plans can only integrate with Cornerstone at this time.
8. Select Generate

9. Select and copy the complete Token for entry into Cornerstone



10. Open and log into the hospitals Cornerstone Software.
11. From the top menu bar, select Lists
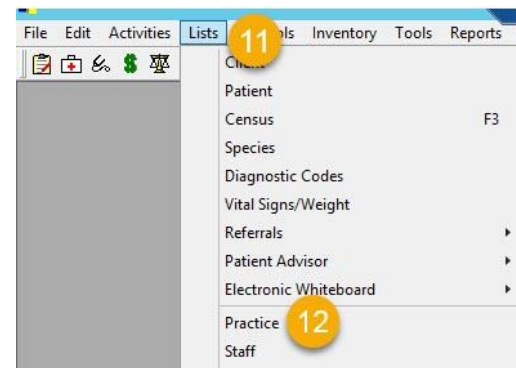12. From the available drop down list, select Practice
13. Select the appropriate Practice name and select Update.
14. Under Login/Password Management, select the drop-down function under Account Information for and select Petly Wellness Plan.
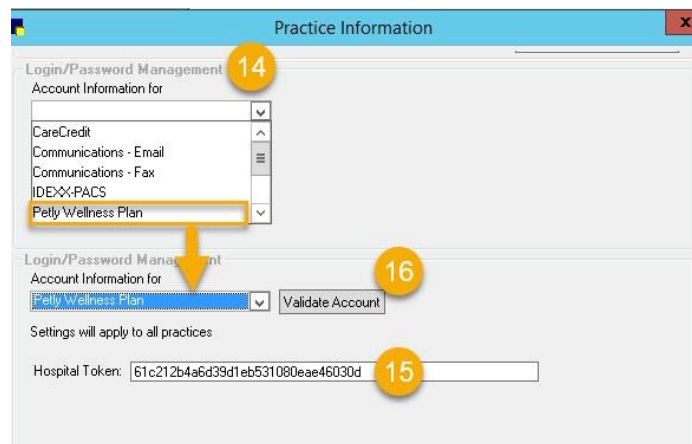15. Paste the Token in the Hospital Token field that was generated from step 9.
16. Select Validate.
17. Click Ok



- Important: Depending on the size of the hospitals database and number of active plans within Petly Plans will determine how quickly the existing plans will populate in Cornerstone.  5-15 minutes is the average synchronization of the Cornerstone and Petly Plans integration for newly implemented hospitals. Existing hospitals can take several hours.



18. To confirm connectivity within Cornerstone immediately, locate and pull up a patient clipboard.
19. Place the mouse pointer directly over the Paw Print – Not Enrolled Status
20. Right click from your mouse and select refresh.
- For optimal performance, it is best to have the token validated during Implementation while a hospital is in Test Mode.

- Please note this step will need to be performed each time a new Patient is enrolled in Petly Plans.