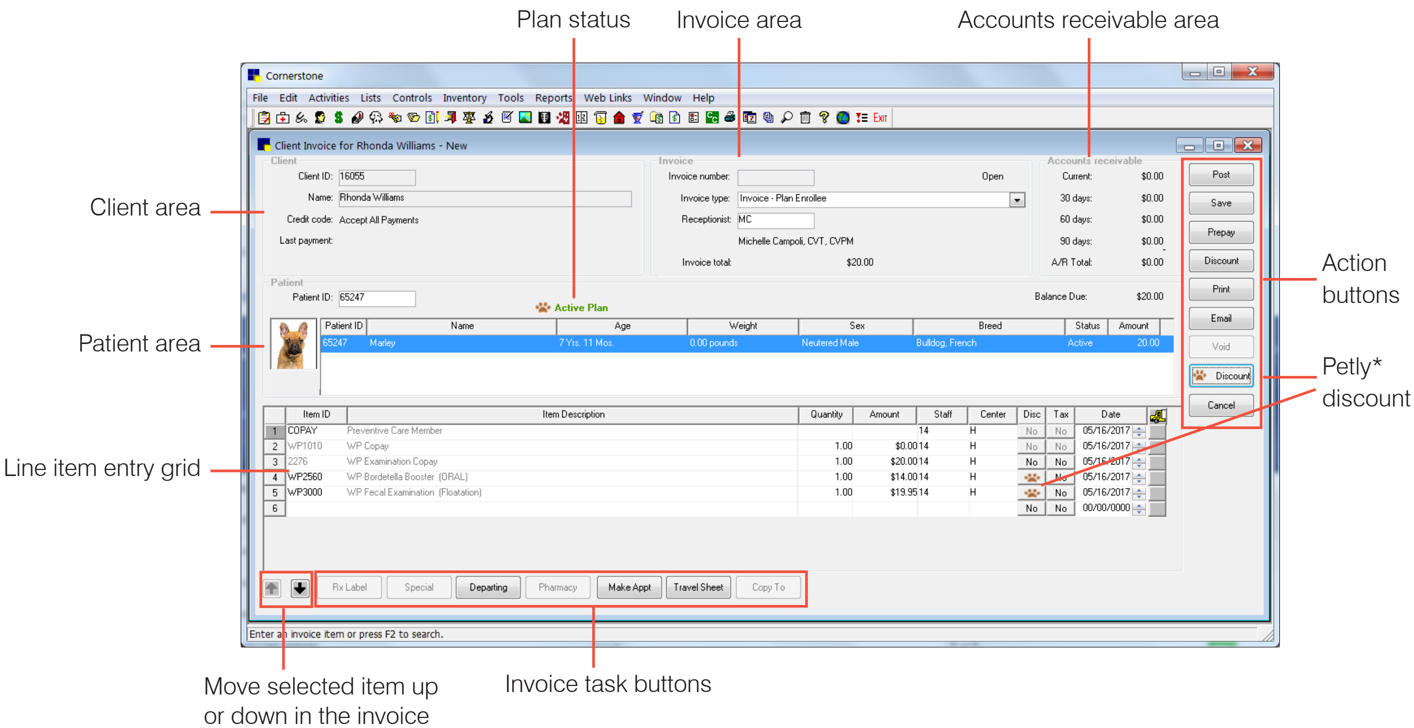
Invoicing

When you invoice a client, many related procedures happen automatically; you can also perform many tasks during the invoicing process. After an invoice is processed and posted, Cornerstone* updates the reminder information and the patient's medical file, generates any departing instructions or special actions linked to the invoice items, and adds the invoice total to the practice sales totals. For Petly* Plans subscribers, available plan items are also automatically discounted and are clearly indicated on screen as well as on the printed invoice.



Open the Client Invoice window

- **Patient Clipboard***—In the Client or Patient List area, right-click and select **Invoice**.
- **Toolbar**—Click the **Invoice** button.

Tip: Start the invoice from the Patient Visit List.

Create an invoice

1. On the Client Invoice window, if the client information is not displayed, type the ID in the Client ID box or press F2 or double-click to search for the client. If the client has an open invoice (an invoice saved but not posted), the client's oldest open invoice automatically appears.
2. In the Invoice number box, press Tab to assign the invoice number (for a new invoice) or to move to the next box (for an existing invoice). To open a different invoice, press F2 and select the invoice.
3. (Optional) From the Invoice type drop-down list, select the invoice type. **Note:** This step may be required, based on your practice invoicing default settings.
4. In the Receptionist box, verify or type the staff ID or press F2 to search for a staff member (for a new invoice) or press Tab to accept the ID and move to the next box.

5. If the patient record is not displayed, in the Patient ID box, type the patient ID or press F2 to select the patient (for a new invoice), or press Tab to accept the ID. If there are invoice items on the Patient Visit List (PVL) for this patient, the PVL window opens. **Note:** The PVL will open automatically when you open or create an invoice, unless the **Display Patient Visit Message** is selected under invoice defaults, in which case you must select **Yes** or **No** to open the PVL from the invoice.
6. Select or clear the **Include** check box for each status, if necessary, and make any other changes. Click **Transfer t**o move the items to the invoice. Add additional items as needed. To remove an item, click the item ID or quantity field and press Ctrl+D.
7. If there are additional patients to invoice, select their names from the list and add items. If you see a special action for a PVL, double-click the **Patient Visit** action to open the PVL, make updates, and click **Transfer.** Repeat for any other patients.
8. Perform any other tasks, such as applying discounts, verifying inventory details, processing special actions, resolving not-requested laboratory or imaging results, etc.
9. Click **Post**. If you are prompted to process any special actions, address open PVLs for other patients, or schedule the next appointment, complete those tasks. **Note for Petly Plans**: Posting will do a final check of available plan items and apply or remove discounts accordingly.

Other Client Invoice window actions

To...	Do this...
Post an invoice	Click **Post**. Make any changes and click **OK.** On the Payment window, process the payment. See the *Client Account–Payments Quick Reference Guide* for more information.
Save an invoice	Click **Save** to save an invoice with an open status so you can make changes or add to the invoice. Items on saved invoices are not counted until the revenue is posted.
Correct or void an invoice	To correct an open or saved invoice, make changes, and then save or post the invoice. You cannot correct a posted invoice; you must select the invoice, click **Void**, and then create a new invoice. If you are voiding specific items from an invoice, on the new invoice enter the negative quantity for the item, and save or post the invoice.
Email invoice	From either the Post Invoice or Payment window, select the **Email invoice** check box.

Invoice task buttons

Lab Work—Enter a lab request that is not on the invoice or add more lab tests to a pending request.

Pharmacy—If you have the Veterinary Pharmacy Reference* (VPR) software installed, print information sheets.

Rx Label—Create a prescription instruction; select the item ID for this item and click the button.

Make Appt—Open the Appointment Scheduler to make a new appointment.

Special—If this button is enabled, there are invoice items with special actions to process.

Travel Sheet—Open a travel sheet and select items to add to the invoice.

Departing—View departing instructions linked to items on the invoice and add more instructions.

Copy To—Copy invoice items from one patient to another.

Keyboard shortcuts

F1	Display onscreen Help for the current window.
F2	Look up values for a list, such as with ID fields.
Tab	Move the cursor to the next field.
Shift+Tab	Move the cursor to the previous field.
Ctrl+D	Delete the selected record.

Right-click menus

Use the right-click menus for quick access to many tools.

Tip: Double-click in ID fields to search for an item.

For more information

For invoicing and payment setup and detailed instructions, see the Invoicing and Payment section of the Cornerstone Help ?.

Go to idexxlearningcenter.com to view snippet videos about many other Cornerstone features, including other client account management topics.

Find this document at **idexx.com/cornerstoneresources**