

## Vet2Pet Invoice Proven Process

**Purpose:** To obtain payment from a client who uses the app and is not in the building

**Objectives:** To have a consistent process to quickly obtain full payment and enter into financial records correctly

**Time frame:** Training is implemented upon hire and upon taking on responsibilities that utilize technician or client care duties

**Oversight Responsibility:** Bookkeeper, Practice Manager, Client Care Supervisors

**Performance Responsibility:** Veterinary Technicians, Client Care Team Members

Check!	Action - full details to follow
	1) Complete invoice closing process in eVet
	2) Create chat in Vet2Pet indicating to owner you are sending invoice
	3) Send invoice
	4) Send payment request
	5) Receive payment, thanking owner
	6) Copy the chat into eVet communication
	7) Appropriately process the payment through eVet being sure to choose Clover Vet2Pet
	8) Be sure chat has been ended

### \*\*\*EVET\*\*\*

- 1) Enter your appropriate charges under the pet and in the patient screen click the blue **checkout** button.
- 2) *If the pet is present*, complete appropriate appointments (do not complete appointments that have not yet occurred!) and then **click update appointments**.
- 3) While you are on this page, note at the top of the client screen in grey next to the client's name their **balance owed** amount and write it down carefully on your paper tablet! (You will need this later.)
- 4) Scroll to the appropriate invoice that has what you are invoicing the owner for, select the **pencil icon** and mark "changed to closed" and then click "**ok**". On the right side of the screen choose the **printer icon** drop down arrow and select "**print invoice**"
- 5) At the bottom left of the screen, you will see the "**invoice**" **download tab** -click on this tab. Then click on the down pointing **arrow** on the top right of the screen. This allows you to **change the**

name from “invoice” to “pet’s name invoice” and save. (If you have a Mac, you can right click the download tab, choose open and save as above.)

\*\*\*VET2PET\*\*\*

- 1) Vet2Pet Dashboard *logged in with your credentials* - choose **users** on the left side of the screen
- 2) Search by last name the owner of the pet in the upper right corner of screen and choose the **chat** button next to the owners name (OR if filling a prescription from an order request chat, perform the steps below starting at #5 in your current active chat)
- 3) In the **title spot** type “Hello! Here is your invoice for Fluffy’s appointment/medication/etc. Please let me know if you have any questions!” (this is in our google doc text templates document if you are a slow typer). Choose the appropriate **pet** from the drop down (do not choose none!) select **High Urgency** and then click **Start Chat**
- 4) To the left of the chat line click on the **paper with a checkmark icon** - choose from the “downloads” folder the invoice that you titled “Fluffy’s invoice” and then click “open”
- 5) To the left of the chat line click on the **dollar icon** - in the title section type “Fluffy’s **appt/medications/etc**” enter the \$ amount the owner owes (*this must be the grey color BALANCE amount you wrote down from eVet*) and click “send”
- 6) Your job is done until the payment **line turns green** as successful then type “Thank you, your medication is ready for pick up! or “Thank you, let us know if you need anything else.” (Again, these are in the template doc if you desire.) Press the **blue paper airplane** *If the line turns red it means the owner has declined so you will need to go out to talk to them if they are present or call them and discuss how they would like to pay.*  
→
- 7) **Highlight the words in the chat** from the first step of your conversation to include “thank you” press **right click on your mouse and choose copy** or press “control button and C key” to copy. Towards the top right of the screen choose “end chat”. You **do not click any boxes**, just click the green “yes”.

\*\*\*EVET\*\*\*

- 1) Go to “patient” in eVet, middle of the page **blue boxes** and choose “add communication”. Mid-way down the page is “communication type” choose from the bottom of the drop down choices “vet2pet” and click the circle for “communication method” (not specified) - you do not

change anything else in this section. Put your cursor in the text box - either right click "paste" or hit "control button and V key" and this should enter your chat from Vet2Pet. Click Save!!!

- 2) Go to the middle of the page blue boxes and choose "check out". (*do not mark update appointments*). Scroll down and uncheck both print receipt and email receipt
- 3) Be sure the dollar amount matches what you charged via Vet2Pet. If it does not, type in the dollar amount you charged. (If it does not match, you must immediately whiteboard bookkeeper to have that on record.) Leave the payment type as Vet2Pet Gravity. *If the client paid cash, clover Gravity, check etc, choose the appropriate type.*
- 4) Click the blue box "process payment". If it gives you a second screen about invoices with the choice to "process payment" click "process payment" again (if this scenario happens whiteboard bookkeeper to evaluate)