

## Completing Research Write Offs in ezyVet

The following steps should be completed by the researcher or a designated representative

Please ensure this process is completed as soon as possible for the smoothest experience and best customer service for our clients

1. Navigate to the clinical record for the study patient
2. Click on the green “Financial” tab and double click on the invoice for the visit

The screenshot displays the ezyVet interface for a patient named "Nova Test Dog (FS)". The top navigation bar includes tabs for Medical, Ophthalmology, Dental, Image Annotations, Health Status, S.O.C., Imaging, **Financial 1** (highlighted with a red box), Summaries, and Appointments. Below the navigation bar is a toolbar with buttons for Send Email, Send Fax, New Memo, New Invoice, New Estimate, New Payment, Create Document, Print Label, Callback, and Send to Cubex. The left sidebar shows the patient's profile, including a photo of a dog, name, ID, date of birth, weight, breed, and a "Complete History" button. The main content area shows the "Financial" tab with a table of pending invoices. The table has columns for Date, Number, For, Patient, Case Owner, Presenting Problem, Amount, Ready, and Last Update. A single invoice is listed, dated 06-17-2025, with number 2946465, for OSU Veterinary Medical Center, patient Nova Test Dog, case owner Wes O'Bryan, amount \$521.92, and last update 06-17-2025 3:26:56pm by Justin Haring. The invoice is marked as "Ready" with a green checkmark. The table footer shows "Page: 1 of 1" and "1 - 1 of 1".

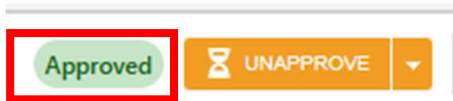
Date	Number	For	Patient	Case Owner	Presenting Problem	Amount	Ready	Last Update
06-17-2025	2946465	OSU Veterinary Medical Center	Nova Test Dog	Wes O'Bryan		\$521.92	✓	06-17-2025 3:26:56pm Justin Haring

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### 3. Ensure the invoice says “Pending” in the top right corner



- If the invoice says “Approved” click “UNAPPROVE” before proceeding to step 4



### 4. Identify the charges that needs to be paid by research, update the Staff Member to “Clinical Research” and enter the Grant Number or Gift Number in the Comments field.

Before change

<input type="checkbox"/> Product	Comments	Department	Staff Member Change All	Quantity	Discount	Total(\$)	
<input type="checkbox"/> 30460 EXAM-INITIAL		Accounting	Nick Weimer	1	5.00% (1)	\$152.00	

After change

<input type="checkbox"/> Product	Comments	Department	Staff Member Change All	Quantity	Discount	Total(\$)	
<input type="checkbox"/> 30460 EXAM-INITIAL	GR123456	Accounting	Clinical Research	1	5.00% (1)	\$152.00	

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5. Click Reset Items and then Save at the top of the invoice

1763963 - "Nova Test Do..." 2946465 - TEST, RE... X

Details Communication Memos Attachments Others Change Log Merge

Save Save & Close Reset Items Add Sales Template Copy New Memo Print Print (Summary)

RVM Dispense Report Print Labels

- The "Total(\$)" field should now show \$0 for all of the research lines. Charges not covered by research will still show an amount

<input type="checkbox"/> Product	Comments	Department	Staff Member Change All	Quantity	Discount \$ %	Total(\$)	
<input type="checkbox"/> 30460 EXAM-INITIAL	GR123456	Accounting	Clinical Research	1	100.00% (2)	\$0.00	🗑️ + ⋮

6. If the invoice was approved to begin with, ensure it is approved again by clicking the "APPROVE" button at the top right of the invoice

Pending ✓ APPROVE ?

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## Troubleshooting

### Unable to See the Comments Field

- Some users may not see a “Comments” column on the invoice. If that is the case, they can click the settings button at the top right of the header for all of the charges, ensure the “Comments” box is checked, then click Save

Staff Member  
Change All

Created

Modified


Quantity




Total Cost(\$)

Markup

\$ %

Total(\$)



Clinical Research	06-17-2025 9:27:38AM Wes O'Bryan	06-17-2025 3:54:34PM Justin Haring	1	\$109.89	-100.00%	\$0.00	  
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☒ Comments

☒ Department

☒ Staff Member

☒ Created

☒ Modified

☐ Inventory Location

☐ Account

☒ Quantity

☐ Batch

☐ Price

☐ Tax Rate


☐ Discount


☒ Total Cost

☒ Markup

☒ Total

☐ Date

 Save

 Reset Table

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## Start-Up or Release Time Funds are Being Used

- In some instances, a researcher may be using Start-Up or Release Time funds. Since these do not have a Grant or Gift Fund number, please ensure the Staff Member is set to Start-Up or Release Time rather than Clinical Research. In the Comments field, enter your Assignee number

Comments	Department	Staff Member Change All
AS123456	OSU Veterinary Medic...	Start-Up

Comments	Department	Staff Member Change All
AS123456	OSU Veterinary Medic...	Release Time