

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 shows the ezyVet interface for a patient named "Nova Test Dog". The "Financial" tab is highlighted in green and has a red box around it. Below the navigation bar, there are several buttons: Send Email, Send Fax, New Memo, New Invoice, New Estimate, New Payment, Create Document, Print Label, Callback, and Send to Cubex. The main content area is divided into sections: "Estimates (0)" with "No Results", "Pending Invoices (1)" with a table of one invoice, and "Financial Records (0)" with "No Results". The invoice table has columns: Date, Number, For, Patient, Case Owner, Presenting Problem, Amount, Ready, and Last Update. The invoice row is highlighted with a red box.

| 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

The screenshot shows the top toolbar of the ezyVet interface. At the top, there are two tabs: '1763963 - "Nova Test Do...' and '2946465 - TEST, RE...'. Below the tabs is a navigation bar with options: 'Details', 'Communication', 'Memos', 'Attachments', 'Others', 'Change Log', and 'Merge'. The main toolbar contains several buttons: 'Save' (highlighted with a red box), 'Save & Close', 'Reset Items' (highlighted with a red box), 'Add Sales Template', 'Copy', 'New Memo', 'Print', and 'Print (Summary)'. Below this toolbar are two more buttons: 'RVM Dispense Report' and '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

The screenshot shows the bottom status bar of the invoice. It features a 'Pending' status indicator, a button with a checkmark and the text 'APPROVE' (highlighted with a red box), and a question mark icon.

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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 |    |

- Comments
- Department
- Staff Member
- Created
- Modified
- Inventory Location
- Account
- Quantity
- Batch
- Price
- Tax Rate
- Discount
- Total Cost
- Markup
- Total
- Date

 

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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 |